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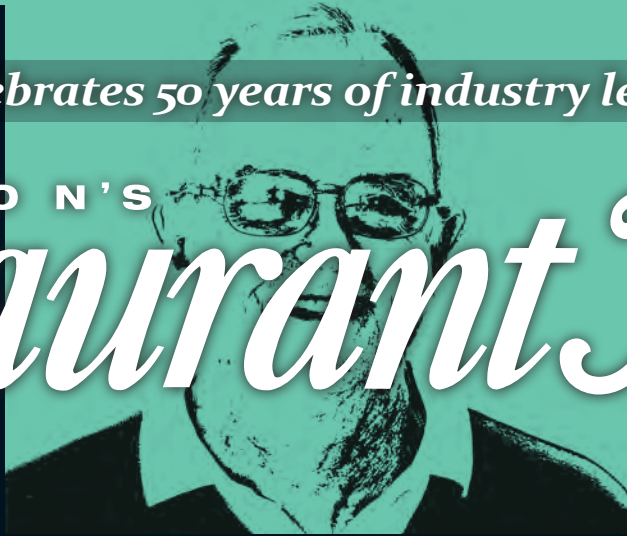
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CONSUMER PICKS

THE DEFINITIVE ANNUAL RANKING OF TOP RESTAURANT BRANDS, PAGE 10



CONSUMER PICKS™



Love. It isn't a word often used *in* businesses, but it is a word often used *about* businesses.

Whether a customer loves your brand, loves your menu, loves your servers or loves your culture translates into whether your business will thrive. Love is a word businesses should get comfortable with.

The annual Consumer Picks special report from Nation's Restaurant News and WD Partners is a measure of restaurant brand success from the eyes of their guests. Surveying customers to the tune of 37,339 ratings, including specific data points on 10 restaurant brand attributes like Cleanliness, Value, Service and Craveability, Consumer Picks ranks 173 chains on whether or not their guests are feeling the love.

In this year's report, starting on page 10, there is valuable analysis on top strategies to win over the customer, from the simplicity of cleaning the restaurant to the more complex undertaking of introducing an app to provide guests access to quick mobile payment options. Some winning brands relaunched menus and others redesigned restaurants. It is very clear through this report's data and operator insights that to satisfy today's demanding consumer, a holistic approach to your brand — who you are, what you stand for, the menu items you serve, the style in which you serve it and the atmosphere you provide to your guest — is required.

This isn't anything new. Anyone in the restaurant business knows what is expected. But it's the execution that counts. And it's the execution that is so hard — mostly because it requires people, in real life, making it happen, to the best of their abilities, day in and day out.

In-N-Out is a dominant player in Consumer Picks, each year winning top scores nearly across the board. The burgers are great; it's fun to see the hand-cut fries; and the service is fast and accurate. But it's the team that makes that happen.

"We hire friendly, hard-working associates who are committed to making sure that every time a customer visits one of our 311 restaurants, that customer enjoys a great experience," said Carl Van Fleet, an In-N-Out spokesman.

It doesn't stop at the hire. In-N-Out pays higher wages than many limited-service restaurant chains and offers some full- and part-time benefits like paid vacations, free meals and a 401(k) plan.

Morton's the Steakhouse, also a winner with top scores across the board, said investment in re-training of servers and staff was key to customer appreciation. The brand worked on the menu and on the restaurant atmosphere, but it doubled down on the team.

Time and time again we hear — and see — that efforts placed against engaging and strengthening a restaurant's workforce, from the corporate C-suite to the hourly worker, is the best indicator of success with the customer and success with the business.

Spreading the love through your workforce is the best way to feel the love from your guests.

Sarah Lockyer

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FIND OUT WHICH BRANDS ARE WINNING OVER TODAY'S DINERS

CONSUMER PICKS

Brand love. It's what matters most for restaurants fighting day in and day out to win a new customer, a repeat guest, a regular, an advocate.

In the sixth annual Consumer Picks special report, Nation's Restaurant News reveals what consumers really think about more than 170 brands in the restaurant industry, from fine dining to fast food.

In partnership with WD Partners, a restaurant strategy and design firm, this proprietary study uses 37,339 survey rating from customers who have dined out in the past six months to dig into what guests want from restaurants, and which brands are providing — or not providing — a quality experience. Each brand is rated on 10 attributes: Atmosphere, Cleanliness, Craveability, Food Quality, Likely to Recommend, Likely to Return,

Menu Variety, Reputation, Service and Value. In addition, consumers tell us which of those attributes are most important to them and to each type of restaurant. The data leads to not only a rich ranking of restaurant brands, but also to insights into consumer demographics and demands.

This special report pays particular attention to the five winning chains within the Limited-Service, Casual-Dining, Fine-Dining and Family-Dining segments. While these winning brands vary in approach, they all show a commitment to what they do best, and a strategy that is clearly leading to results.

Consumer Picks, with data and rankings, analysis and insights and consumer infographics and information, is a deep dive into consumer tastes and trends every operator will want to study to help move their businesses forward.

KEY TERMS:

ATTRIBUTES
10 areas of customer ranking, including: Atmosphere, Cleanliness, Craveability, Food Quality, Likely to Recommend, Likely to Return, Menu Variety, Reputation, Service and Value

ATTRIBUTE SCORES
The percentage of respondents who said a brand excelled in an attribute area, or who said they were highly likely to revisit or recommend the brand

OVERALL SCORE
An average of a brand's Attribute Scores, weighted by the level of importance customers in their respective segments placed on each attribute

DEMOGRAPHIC TRENDS
Insights represent areas where a difference of +/- 5 percentage points was present between demographic groups' responses



WINNING BRANDS

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w*d* The Consumer Picks survey was developed by WD Partners' Insights group, a division of WD Partners. For more detailed or customized data, contact mary.rea@wdpartners.com.

The restaurant brands featured on the following pages vary widely in cuisine and service style, but they've each found ways to resonate with consumers. NRN takes a closer look at the top-scoring brands in Limited Service, Casual Dining, Fine Dining and Family Dining. For the largest segment, Limited Service, which includes 112 brands offering everything from ice cream to tacos, we showcase the top scorers among both treat brands and savory brands.

LIMITED-SERVICE WINNER / SWEET

BEN & JERRY'S

BY JONATHAN MAZE

Ben Cohen and Jerry Greenfield took a \$5 correspondence course on ice cream making and in 1978 used that knowledge to start their first shop in a Burlington, Vt., renovated gas station.

After they rented space in an old spoon and bobbin mill, it was the packaged ice cream the two started selling in 1980 that would make Ben & Jerry's a nationally known brand with ice cream names like "Cherry Garcia" and "Chubby Hubby."

But the company's franchise system remains an important element of that brand and that, too, remains beloved among consumers — enough so that the 579-unit chain received top marks among Limited-Service chains in a highly competitive field.

"We consider it a crucial part of who we are because it brings the Ben & Jerry's brand to life," said Eric Thomas, the franchise development manager for the chain. "The shops have remained near and dear to our hearts as we've grown."

The chain was the overall leader among Limited-Service chains, earning top scores in that category in a variety of measures, including Food Quality, Menu Variety and Reputation.

Ben & Jerry's believes that its success is rooted in training and its location strategy. The company concentrates on building new stores in places where people are walking and enjoying themselves, leisure-time destinations.

"We focus on leisure-time destinations where people are on foot and having a great time, whether they're dining at restaurants, an upscale boutique style shopping, going to the movies or the theater," Thomas said. "They're spending money because they want to, not because they have to."

The chain is careful in selecting new locations that fit this definition, and build between 10 and 15 locations each year.



#1
OF 112
LIMITED-SERVICE
CHAINS

SURVEY STRENGTH: CRAVEABILITY The limited-service ice cream chain's location strategy concentrates on building new stores in places where people are walking and having a good time.

"Our growth is focused more on quality over quantity," he said. "We know that finding those fun, leisure-time destinations is a challenge, and we want to make sure we're opening in the right spots." And with the right operators, he said.

The system's operators generally own two or three locations at a time so they are closer to the customer base.

"We have to feel comfortable with our franchise candidates," Thomas said. "They have to be passionate believers in Ben & Jerry's values. It's a different sort of franchisee who becomes a Ben & Jerry's franchisee. We're looking for people who want to own a business that puts smiles on people's faces."

He added that the company's mission

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PHOTOS: BEN & JERRY'S

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and values — which include using sustainable methods to make its ice cream; ensuring the company can manage growth along with an active social mission — fits well with today's younger consumers.

“Our iconic flavors have served us well over the years,” Thomas said. “But the mission and values really resonates, particularly with younger folks and the Millennial generation. It's a really nice fit.”

Ben & Jerry's also focuses heavily on training and development. The company invites prominent guest speakers to talk about customer service at the company's annual franchise meetings. It works with franchisees on developing young workers and has a program for store managers.

The company's field team works with store managers as well as with franchisees. Ben & Jerry's has a store manager advisory council, as well as a franchisee advisory

council, that gives the company feedback and helps work on service issues.

“It's different to manage a young person who is working in a scoop shop today than it was 15 years ago,”

Thomas said.

“Ice cream is supposed to be an uplifting, fun, rewarding element in someone's day,” he added. “Whether they're celebrating a great event, or if they're coming for a pick-me-up. Our job is in making that moment happen.” ■

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JAMIE MCCARTHY/GETTY IMAGES FOR BEN & JERRY'S

Ben & Jerry's uses sustainable methods to make its ice cream in order to manage the chain's growth in popularity among Millennials.

LIMITED-SERVICE WINNER / SAVORY

IN-N-OUT BURGER



IN-N-OUT BURGER

SURVEY STRENGTH: REPUTATION In-N-Out Burger's cult-like following deems it a must-go destination for people who live on the East Coast when they travel to California. The iconic chain garners a great deal of customer enthusiasm.

BY JONATHAN MAZE

In-N-Out Burger bested its burger competition to finish tops in the Consumer Picks survey among Limited-Service chains.

This is no surprise. It's almost a rite of passage for the iconic chain. It makes a frequent appearance at the top of that list, including 2013 and 2015, and when it doesn't finish at the top it is not far behind.

Why does In-N-Out garner so much enthusiasm and such a loyal following when burgers in the restaurant business are so ubiquitous — and when numerous other chains have emerged in recent years that target quality consumers? Why do people who live on the East Coast

consider a visit to In-N-Out a must whenever they travel to California?

The answer to that is its simplicity. In-N-Out has focused on a very limited menu of burgers and fries, and has served that menu very well since Harry and Esther Snyder opened the first location in a 10-square-foot space in Baldwin Park, Calif., in 1948.

“It's so beautifully, incredibly simple,” said John Gordon, a restaurant consultant based in San Diego. “It's burgers, fries and shakes and there's little else.”

That simple menu enables the chain to avoid shortcuts. The burgers are fresh and not frozen. The fries are cut in house.

“Somebody is peeling potatoes somewhere,” Gordon said. “They're sliced from the whole potato into

French fries in a bowl right before they're put into a fryer. And it's very visible to the customers in the store. There's a little stagecraft.”

For all of its simplicity, In-N-Out has its own menu expansion in the form of a “secret menu” that its loyal customers know about, which can build loyalty. Indeed, the secret menu has been so successful that many other chains have since adopted their own secret menus over the years.

And the company has kept price points to a minimum. That has enabled In-N-Out to remain under many competitors in the emerging better burger category.

Perhaps most importantly, the chain is dedicated to operations and customer service.

“We have always been extremely focused on quality and we've always placed a heavy emphasis on custom-

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LIMITED-SERVICE WINNERS

BEN & JERRY'S / IN-N-OUT BURGER



IN-N-OUT BURGER

In-N-Out has focused on a very limited menu of burgers and fries, and that simplicity has served the chain very well.

CONTINUED FROM PAGE 14
er service,” said Carl Van Fleet, an In-N-Out spokesman. “In fact, our mission statement contains these words: “The customer is our most important asset.”

“We hire friendly, hard-working associates who are committed to making sure that every time a customer visits one of our 311 restaurants, that customer enjoys a great experience.”

The hiring piece is important. The company pays higher wages, generally over \$11 an hour, according to the employer rating website Glassdoor. The chain also provides a good environment for those workers; the company’s employees and former employees give the chain high marks on Glassdoor.

“The quality of the crews are considerably better than what you’ll find almost anywhere else,” Gordon said.

The hamburger patties are prepared in a commissary, Gordon noted, and no store is more than 200 miles away from one, a fact that has

limited the chain’s expansion opportunities over the years, but helped it maintain that important quality.

This strategy would not likely be possible if In-N-Out didn’t remain a family company. When investors buy equity in a chain, or a company goes public and starts selling stock, it can force compromises in the name of growth and profits. The family-owned

nature of the business has enabled it to remain remarkably disciplined. So the company doesn’t have outside pressure to lower wages or raise prices or build more units or serve frozen burgers.

Of course, most readers probably know all of this. In-N-Out is famous for it. Customers know about the secret menu and the low prices and the hard-working employees and the company’s refusal to sell out to Wall Street. And maybe that’s why it continues to remain at the top of the Consumer Picks list year after year. ■

#12
OF ALL 173
RESTAURANT
CHAINS

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CASUAL-DINING WINNER

THE CHEESECAKE FACTORY

BY LISA JENNINGS

At a time when consumer tastes are changing, fans of The Cheesecake Factory know they can always find what they want on the menu: Something for everyone.

The 187-unit chain was the top pick within Casual Dining in this year's Consumer Picks survey, earning the highest marks for Food Quality, Cleanliness, Reputation, Likely to Recommend and, unsurprisingly, for Menu Variety.

Perhaps more than anything else, it is The Cheesecake Factory's broad menu of more than 250 items made from scratch — from Avocado Eggrolls to Pasta Carbonara — that sets the brand apart.

The trick has been keeping the vast menu relevant. Over the past year, The Cheesecake Factory has struck a chord in that regard with the addition of a new "Super" Foods menu, with dishes like almond-crusting salmon served over kale; shaved Brussels sprouts and quinoa; and the Super Antioxidant Salad with spinach, kale, broccoli, avocado, roasted pear and blueberries with a lemon-blueberry vinaigrette.

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CASUAL-DINING
CHAINS



PHOTOS: THE CHEESECAKE FACTORY

SURVEY STRENGTH: MENU VARIETY The Cheesecake Factory's broad menu of more than 250 items made from scratch, including the Oreo Cheesecake slice pictured left, is what sets the brand apart. The chain keeps the vast menu relevant with the addition of the "Super" Foods and SkinnyLicious menus.

David Gordon, president of The Cheesecake Factory Inc., said the new lineup was such a hit after it was introduced last summer that it was expanded with a new menu rollout earlier this year.

"We knew 'Super' Foods would resonate, especially with Millennials," Gordon said. "'Super Foods' is probably one of our greatest areas of competitive advantage."

The Calabasas Hills, Calif.-based

chain also struck gold with the addition three years ago of its SkinnyLicious menu, a platform of dishes under 590 calories, as well as more small plates and snacks. The move added options for health-minded customers, even though more often than not those customers finish their lower-calorie meal with a slice of indulgent cheesecake.

Gordon said internal surveys indicate
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that about one quarter of customers say they come specifically for the legendary cheesecakes, which are available in about 70 varieties throughout the year, from White Chocolate Raspberry Truffle to Caramel Pecan Turtle.

Food may be a focal point, but the experience is also a top priority, Overton said, during an earnings call with analysts in February.

The company is increasingly turning to technology to enhance the customer experience.

In the second quarter, The Cheesecake Factory will roll out a new mobile app dubbed Cake Pay that will allow customers to pay their bill with a smartphone, eliminating the pain point of waiting for servers to bring the check.

After testing the app in three units, Overton said, "We feel like it certainly can enhance somebody's experience towards the end of their meal and give them that convenience to be able to pay whenever they'd like."

Other casual-dining chains have moved further into consumer-facing technologies, like touchscreen tablets for ordering, but that's not something that customers will see at Cheesecake Factory anytime soon, Gordon said.

Instead, technological advances are happening behind the scenes. For example, the chain recently rolled out a system of end-to-end encryption in restaurants to ensure that no customer credit card

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RESTAURANT
CHAINS



SURVEY STRENGTH: LIKELY TO RECOMMEND Although food is a focal point for the chain, overall experience is also a top priority, according to The Cheesecake Factory's chairman and CEO David Overton. The company is turning to technology to enhance customer experience, such as rolling out a mobile app to allow customers to pay their bill with a smartphone. That emphasis on experience likely is a key factor in the chain's segment-leading Likely to Recommend score.

data is in the possession of the restaurant. In the event of a security breach, an increasingly common occurrence in the restaurant industry, hackers would come away empty handed.

Technology will also play a role in a new server training program set to roll out this year that will focus on "meeting today's guests' needs in service and hospitality," Gordon said.

"We do think guests today are willing to wait for something that's experiential," he said. "It's not just about the food."

Given the challenges of executing the vast menu and keeping customer experience in mind, The Cheesecake Factory also takes pride in hiring and retaining top talent, Gordon said. In March, the chain was named among Fortune magazine's 100 Best Companies to Work For, for the third consecutive year. It was the only restaurant company to make the list.

Meanwhile, The Cheesecake Factory is also exploring ways to meet customer needs outside its restaurants. About 10 percent of sales already come from take-out.

Within the next two months or so, the chain plans to begin testing the use of various third-party services to offer delivery.

Gordon said the test would be in California, but he declined to say where specifically.

The Cheesecake Factory attempted delivery years ago, but that was before the recent wave of tech-minded, third-party specialists began changing the landscape, allowing customers to use their smartphones to order their favorite restaurant meals to their homes with a few taps.

"We're seeing Millennials wanting to eat at home more than ever before,"



SURVEY STRENGTH: FOOD QUALITY The Cheesecake Factory's Reese's Peanut Butter Chocolate Cake, shown here, is one of the 70 cheesecake varieties offered, in addition to salads, sandwiches, pizzas and entrees. The chain received the highest Food Quality score of any Casual-Dining chain.

Gordon said. "But we want to make sure our brand is protected and that people feel its part of The Cheesecake Factory experience; that food is delivered the way we want."

If delivery takes off, the move could open up a new line of incremental revenue for The Cheesecake Factory, which surpassed \$2 billion in sales for the first time in 2015. The chain's average unit volume for domestic restaurants grew to \$10.6 million last year.

Still, like most concepts in casual dining, growing traffic remains a challenge.

The Cheesecake Factory's same-store sales rose 1.1 percent in the fourth quarter ended Dec. 29, but that included a 2.5-percent increase from pricing and 0.5-percent growth in positive mix. Traffic declined 1.9 percent, and company officials project traffic trends in fiscal 2016 to be flat to down 1 percent.

However, Overton said the brand is "navigating the challenging landscape by continuing with our successful recipe of menu and design innovation and operational excellence that is served to make The Cheesecake Factory one of the most differentiated restaurant concepts in the casual-dining industry."

The brand is also growing in popu-

larity overseas, and international expansion is accelerating. The chain has opened licensed units in the Middle East and Mexico.

This year, four to five international locations will open, including the first unit in China, within the Shanghai Disney Resort, a high-profile location that is likely to introduce the brand to a new global audience.

Domestically, the company expects to open eight restaurants, including one unit of sister brand Grand Lux Cafe. The goal is to reach 300 units in the U.S., which Overton said is well within the company's reach.

In addition to the core brand and Grand Lux Cafe, the company operates one RockSugar Pan Asian Kitchen location.

And executives are actively looking for a new brand for expansion, either by acquisition or a concept grown internally, possibly taking a step away from casual dining.

"Fast casual is interesting to us, although fit and growth potential are our key priorities," said Doug Benn, The Cheesecake Factory chief financial officer and executive vice president, during the February earnings call. ■

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OVERALL
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PHOTOS: THE CHEESECAKE FACTORY

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FINE-DINING WINNER

MORTON'S THE STEAKHOUSE

BY BRET THORN

Morton's The Steakhouse, squeezed past Ruth's Chris Steak House, last year's winner, to be the top scoring Fine-Dining chain in the Consumer Picks survey.

"We've done a lot of things differently than the old Morton's," said Tim Whitlock, Morton's chief operating officer. Whitlock worked at Morton's more than 20 years ago before leaving the chain. He eventually came to work for Landry's, and when company chairman and CEO Tilman Fertitta bought Morton's, he made Whitlock its COO.

Since then, Whitlock and his team have worked to upgrade Morton's training procedures, revamp the menu and take the decor in a different direction.

All five of the white tablecloth chains in the survey — Morton's, Ruth's Chris Steak House, The Capital Grill, Fleming's Prime Steakhouse & Wine Bar and McCormick & Schmick's round out the quintet — scored in a pretty tight range,



PHOTOS: MORTON'S THE STEAKHOUSE

SURVEY STRENGTH: CRAVEABILITY Four years ago, Morton's added 15 new menu items, including surf and turf platters that paired filet with shrimp, scallops and a crab cake. It has recently added seasonal salads, and lower-priced side dishes and desserts. Morton's was slated to introduce an 8-ounce Snake River Farms Wagyu strip steak, above, on April 1.

with the difference in most of the scores being statistically insignificant. Ruth's Chris, for one, had high scores for Food Quality, Cleanliness, Reputation and Likelihood to Recommend.

However Morton's was markedly higher in terms of Value, Atmosphere and Craveability — all factors that the chain's management has been working to improve since Houston-based Landry's took it over in 2012.

When it comes to decor, Morton's locations traditionally have been big, masculine steakhouses with shuttered windows and Rat Pack era music of the 1950s and '60s. Whitlock's team changed the

carpet, chairs and upholstery, making it all slightly darker, but they also opened the windows to let in natural light, sometimes to dramatic effect.

"We have a restaurant in San Juan, Puerto Rico. We took the shutters off the windows and now we have an oceanfront restaurant," Whitlock said.

The team also introduced a musical format more suitable to the 21st century.

The systemwide remodeling of the chain's 73 restaurants is about 90 percent complete, Whitlock said.

When it comes to service, Morton's has "a great team of people — great

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OF FIVE
FINE-DINING
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regional managers, great servers and managers who love the hospitality business,” Whitlock said. “We’ve really focused on hospitality over the past four years: Great service, great upscale food, paying attention to the flavors and the plate presentation. We’ve made a commitment to retrain our teams — not only managers, but also our service staff, with our training department going to restaurants and retraining.”

That has included switching out training materials from a “kind of a self-guiding tool that was a bit dated in my opinion,” to a more traditional, but up-to-date training manual. “And hopefully soon we’re going to update that with video training as well.”

When it comes to food, Morton’s has started to do something it had rarely done in the past: Change it.

“The menu was pretty much the same for the last 30 years,” Whitlock said.

Then four years ago the company introduced 15 new menu items, including surf and turf platters that paired filet with shrimp, scallops or a crab cake.

“They pretty much went to the top of the list of sales of items that were sold,” Whitlock said.

Morton’s also introduced lower-priced items, including a 6-ounce filet, now its top selling steak.

“A lot of people don’t want a 12- or 14-ounce filet mignon,” Whitlock said. “They want a nice filet, but they don’t want that much of it.”

As a result, he said, more customers are ordering items with lower-food costs, such as salads, side dishes and desserts, making the meals more profitable.

“If you get a dessert or salad, I’m a very happy person,” Whitlock said.

Morton’s also introduced short ribs and a mixed grill, along with new plating that veered from the traditional round and oval steak plates into new rectangular and oblong dishes.

Morton’s also introduced bar specials for its early evening Power Hour, including a trio of 2-ounce filet medallions, each with its own sauce — peppercorn, Béarnaise and blue-cheese butter — for a total of \$8.

“That has been a big seller for us. People seem to really enjoy that,” Whitlock said.

Customers also like the Prime mini cheeseburgers that start at \$7. Last month the chain introduced a Million Dollar Burger, a cheeseburger topped with foie



SURVEY STRENGTH: ATMOSPHERE Morton’s locations traditionally have been big, masculine steakhouses with shuttered windows and Rat Pack era music of the 1950s and ’60s. However, recent changes have been made to the carpet, chairs and upholstery, which are slightly darker but now offset by natural light from open windows.

#1
OF ALL 173
RESTAURANT
CHAINS

gras and truffle butter for \$18.

Recent seasonal specials, which change every six months, include the Bacon Steak, composed of two thick, broiled 6-ounce slabs of Nueske’s bacon served with a bourbon glaze, “so it’s crunchy on the outside and moist on the inside,” Whitlock said.

Seasonal salads are on the menu, too, now, along with specials such as bone-in filets and New York strips and mashed cauliflower with Parmesan cheese.

On April 1 the chain was slated to introduce an 8-ounce Snake River Farms

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PHOTOS: MORTON'S THE STEAKHOUSE



Morton’s has added smaller steaks to its menu, which has led more customers to order desserts and side dishes, which often have lower food costs. Its Strawberry Rhubarb Crisp, above, and Shrimp Alexander, left, are two such options.

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FINE-DINING WINNER

MORTON'S THE STEAKHOUSE



MORTON'S THE STEAKHOUSE

Morton's has a diverse menu that includes items such as tagliatelle bolognese, pictured above.

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Wagyu strip, too.

The team led by Tylor Field III, Morton's vice president of wine and spirits, has also upgraded beverage options, with seasonal cocktails changing every six months, and premium wines by the glass, rotated out twice a year.

"The consumer is always looking for something new and fresh and different," Whitlock said.

To that end, Field has worked with Raymond Vineyards in St. Helena, Calif., to make a proprietary wine blend.

"It has been very, very successful for us," Whitlock said.

Field also has brought in Coravin, a wine-dispensing device that replaces the wine in a bottle with inert argon gas, allowing restaurants to offer more premium wines by the glass without waste.

So now the restaurant, which has long offered about 40 wines by the glass, now also offers four high-end wines between \$25 and \$30 per glass.

Whitlock said customers have responded well to the chance to try just one glass of pricey wine rather than committing to a whole bottle.

"They love it," he said. "And they like to come back and have another

glass of that wine," resulting in more repeat business.

Field also upgraded the chain's craft beer program. Morton's has developed a national program and enabled local managers to source beers that are popular in their markets.

"It makes the restaurant feel a bit more local — part of the community," Whitlock said, adding that each unit also gets involved with local charity events.

The upshot of all of those changes, apart from higher Consumer Picks scores, has been a somewhat younger customer base that has joined the "traditional VIPs" that have been Morton's core audience. The price point is down a little, but so are food costs.

Morton's has been opening new restaurants, too, including one in downtown Manhattan three years ago and in Taipei, Taiwan, in 2015.

In the coming year, Morton's plans to open two new restaurants, both in upstate New York — one in Saratoga and the other in Niagara Falls.

"We're going to be their steakhouse of choice," Whitlock said. ■

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OVERALL
SCORE:
79.9%

FAMILY-DINING WINNER

CRACKER BARREL OLD COUNTRY STORE

BY RON RUGGLESS

Cracker Barrel Old Country Store Inc. regained the top spot among full-service Family-Dining restaurants in the 2016 Consumer Picks survey. The chain succeeded First Watch, which was ranked No. 1 in Family Dining in 2015.

The Lebanon, Tenn.-based chain returned to the top Family-Dining spot after being edged out last year for the first time in the six years of the survey, said Dennis Lombardi, consultant for the WD Partners Consumer Picks survey and president of Insight Dynamics LLC.

This year, University Park, Fla.-based First Watch Restaurants Inc. moved down to the second-place position, and Beaverton, Ore.-based Shari's Café & Pies — which statistically has a much smaller base — moved up.

“Shari's made a material improvement, going from 12th out of 16 last year to third out of 16 this year,” Lombardi said. “In addition to having the sub category high score in Menu Variety, it materially improved its scores in a number of other attributes.”

Cracker Barrel took the top spot in four of 10 surveyed attributes: Reputation, Service, Cleanliness and Atmosphere.

Christopher A. Ciavarra, Cracker Barrel's senior vice president of marketing told NRN that the brand is always looking for ways to enhance all four of those areas to contribute to its overall top ranking.

“We've got a pretty clear idea of who we are and the kind of experience we are trying to create,” Ciavarra said.

Positioned along major arterials in 42 states, Cracker Barrel has made itself the home away from home for travelers and, with its Old Country Store gifts shops, offers something of a quick vacation to a more nostalgic time. That distinguished atmosphere extends to the



SURVEY STRENGTH: ATMOSPHERE Cracker Barrel's atmosphere includes white, wooden rocking chairs on the front porch, below, and the retail store, above, gives the brand a unique twist over other Family-Dining competitors.



PHOTOS: CRACKER BARREL OLD COUNTRY STORE

#1
OF 16
FAMILY-DINING
CHAINS

lines of white, wooden rocking chairs on the front porch of Cracker Barrel units. And, of course, they are for sale.

Once guests are on the property, Ciavarra said, “we have pretty clear standards. We know when they come up on the front porch, what it should look like. And then through the gift shop, what that should look like.”

The retail store gives the brand a unique twist over other Family-Dining competitors. “We're an Old Country Store,” he said. “The gift shop does a lot of that work for us at the end of the day.”

The retail shop offers the chain, which is only closed on Christmas Day, an opportunity to give guests a two-fer: a dual shopping and dining experience.

CONTINUED ON PAGE 28

CONTINUED FROM PAGE 27

And the rotating merchandise is a way to make each visit fresh, Ciavarra added.

"It creates a sense of change with guests for new and interesting things and serves as a waiting room for those guests whose names are on the waiting list," he said.

The retail shop also is lucrative. "We generate more than \$420 a square foot in that space," he said. "Most small retailers would be delighted with those kind of sales. But, for us, it's an important part of the experience."

In the restaurant space, bathrooms are critical, Ciavarra said. And that point is especially important for Cracker Barrel, which because of its roadside locations, gets a higher percentage of travelers than many competitors.

"We source about 30 to 35 percent of our guests from traveling," Ciavarra said, explaining on of the brand's chief marketing pushes: billboards. "For us, if the customers are stepping off the road and they are looking for a place to eat but also a bathroom."

In addition to spic-and-span restrooms, the



#22
OF ALL 173
RESTAURANT
CHAINS



PHOTOS: CRACKER BARREL OLD COUNTRY STORE

company trains cleanliness at every employee position, he said. "Every position has cleanliness tied to it in some way, be it server, back-up cook, grill cook, a dishwasher," he said. "They all have cleanliness standards tied to them."

Each employee is trained with a "clean

as you go" model throughout their shift, he added. On top of what the store day and evening teams do toward cleanliness, each restaurant has a night maintenance who does additional cleaning beyond what the store operating teams have done.

SURVEY STRENGTH: CLEANLINESS Each Cracker Barrel restaurant has a night maintenance crew that does additional cleaning beyond what the store's teams do around their shifts.

Left: The brand embraces patriotism and works with a number of military-based causes.

If any brand in the restaurant space embraces patriotism more than Cracker Barrel, it would be hard to find.

The company works with a number of military-based causes and, because of its Tennessee roots, taps into country music like few other restaurant concepts can do. Both enhance the brand's red-white-and-blue reputation.

"Cracker has a lot of commitment to military families," Ciavarra said.

"For a long time, our guests have associated us with patriotism, America and, to a degree, military. It's also a place of family bonding, so military families are quite important to us. We have a number of past service people on our teams. Over the course of time, we invest in supporting that cause."

The company last year, for example, continued its Annual Four-Star Salute, an online auction where proceeds benefit the United Services Organizations, or USO, and Disabled American Veterans.

The company bridged its patriotism

and music reputations last year by tying into a program with the Academy of Country Music that featured a life-size checkers board game with country artists to raise money for philanthropic groups.

"This can be a very lifestyle-driven brand," Ciavarra said.

"We use music as a way to connect culturally with different groups. For example, to improve our reputation with the younger market we target artists that can help build affinity with them."

This past fall, Cracker Barrel worked older artists as well as with more teen-focused singers such as the vocal group Pentatonix and singer-songwriter Rachel Platten, who had the pop hits "Fight Song" and "Stand by You."

Cracker Barrel has a music catalog program that at any one time will include between five and eight artists who provide content or music packaging that is exclusive to the brand.

"We recognize music is important to us," Ciavarra said. "It is important to our

guests. It's just one of those nice intersection points."

The full-service chain has a mission stated as: "Pleasing People." And that is the core of the service model.

"It's a pretty straightforward mission," Ciavarra said. "If you speak to hourly, they know that.

They sense the tone and the general rules around which we operate: general respect. We have a pretty clear understanding about our brand. We want to create a home away from home where our guests are treated like family."

Employees in the restaurants wear stars on their aprons that reflect where they stand in Cracker Barrel's Personal Achievement Responsibility, or PAR, program, distinguishing how far they have advanced.

"If you can continue to take on increasing skills and increasing skills and you demonstrate different behaviors, you can increase in pay and benefits. You can move up in the organization."

The brand's e-learning program has a series of modules to the levels, that go up to PAR 4.

In addition, some service secrets are less based on e-learning than on simple, tried-and-true techniques such as a medallion program.

"That's a literal medallion that one shift leader hands over to another person if someone at the front of the house has to leave for floor," Ciavarra said, assuring that someone is always in charge.

The company also last year rolled out a new dining-room management technology system to the system. "We think that allows us to better manage the floor, and we think will allow us future capabilities that we're excited to unlock," he said.

Cracker Barrel has made many advances in the areas of Atmosphere, Cleanliness, Reputation and Service, but Ciavarra said the company continues to make changes.

"The consumer space is pretty dynamic and changing

quickly," he said.

"And we are working hard to evolve and meet that changing world while preserving the pieces that we think remain

important to our guests and future guests."

One area the company has been working on is the Hispanic customer demo-

OVERALL
SCORE:
68.0%

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Simple Operations =
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**Return on Effort

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CONSUMER
PICKS

*#1 LSR Beverages & #6 Overall LSR

The challenge of staying relevant

Consumer Picks results paint a picture of shifting fortunes as brands race to keep up with changing consumer preferences

BY LISA JENNINGS

T

he top scorers in key categories within this year's Consumer Picks survey brought no surprises.

The lineup of consumer favorites like In-N-Out Burger, The Cheesecake Factory, Morton's the Steakhouse, Ben & Jerry's and Cracker Barrel Old Country Store include a solid

group of brands that have largely stuck to their knitting in their respective categories but also stayed relevant.

They do what they do well and have continued to do so for the younger generations that appear to be reshaping consumer preferences today.

But it's within the restaurant segment niches — Casual-Dining/Seafood restaurants, for instance — where we see more dramatic stories being told about consumer preferences.

Chains like Red Lobster, Ninety Nine Restaurants & Pub, Smashburger and Rubio's climbed the ranks in their respective categories this year, indicating that brand revamps and efforts to update are resonating with customers.

"Brands have to evolve to stay relevant," said Dennis Lombardi, consultant for WD Partners, which conducted the Consumer Picks survey for NRN.

"The trick is to not get too far behind the consumer and not too far ahead," Lombardi, who is also president of Insight Dynamics LLC, said.

And it takes time for consumers to notice efforts to evolve a brand, he noted.

"Brands and their perception by consumers turn at about the same speed as large supertanker oil freighters," Lombardi said. "It takes some time for enough consumers to

SMASHBURGER



Smashburger climbed the overall Limited-Service rankings this year and landed a spot as the No. 2 player within the Limited Service/Burger category. The chain has earned consumer favor by focusing on food quality and targeting Millennials.

experience the brand for it to show up in the rankings."

It doesn't take long, however, for brands to fall out of favor.

Within the limited-service Mexican category, for example, Chipotle Mexican Grill dropped significantly this year, allowing other players a leg up.

"It's like a roller coaster," Lombardi said. "You go up very slowly but come down real fast."

Among those that improved their standings this year include Red Lobster, which climbed significantly in the rankings for Casual-Dining chains. Red Lobster, acquired by Golden Gate Capital in 2014, went from the No. 14 slot last year to No. 4 among overall Casual-Dining restaurants in 2016.

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RED LOBSTER



Red Lobster has kept a steady pace of change by giving restaurants a facelift with remodels that sport a new Bar Harbor design.

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Over the past two years, the chain has kept a steady pace of change by giving the restaurants a facelift with remodels, catering the menu to new food trends and engaging with customers on social media.

Red Lobster units now sport a new Bar Harbor design, and

the menu includes more wood-grilled items, larger shrimp and the scampi sauce is now made from scratch in house, all the better for dipping the popular Cheddar Bay Biscuits.

Within the Casual Dining/Seafood subcategory, Red Lobster scored the highest on Service, Menu Variety, and Craveability, indicating that efforts to invigorate the menu are meeting consumer preferences.

Other chains made an impression on consumers by emphasizing value and focusing on building a regular customer base with consistency.

Also in Casual Dining, Ninety Nine Restaurant & Pub made a surprise showing at eight place — up from No. 25 last year — earning the highest score for both Value and Likelihood to Return.

Owned by Nashville, Tenn.-based American Blue Ribbon Holdings, the 106-unit Ninety Nine was born in Boston and is known for its New England-style menu, including

signature broiled sirloin tips, hand-breaded boneless wings and frosty mugs of beer.

Charlie Noyes, president of Ninety Nine, said the chain has long focused on “all day, everyday value, not at all on discounting,” including entrées at the wallet-friendly \$9.99 price point.

Also, over the past three years, the chain has been remodel-

Several chains made a positive impression by emphasizing value and focusing on building a regular customer base.

ing restaurants, opening up the bar area and adding more high-top and communal tables. With that has come more pop-up promotions around holidays or sporting events that generate buzz, though, Noyes said, “It’s not the food fad of the month. Guests know they’ll get great consistent quality here.”

Today’s consumers, especially younger generations, are focused on quality and sourcing of ingredients more than ever, and that trend could be seen throughout the Consumer Picks rankings.

Among Burger players, Smashburger climbed the overall Limited-Service rankings, moving to No. 19 from last year’s 49th place. This year, Smashburger was the second-highest-ranking player within the overall Limited Service/Burger category, behind perennial favorite In-N-Out Burger.

It’s a competitive category, but Smashburger has earned consumer love by focusing messaging on the quality of its food.

Over the past year, Smashburger has increased its marketing focus on Millennials, particularly using Instagram and Snapchat, said Josh Kern, Smashburger’s chief marketing officer.

“We significantly grew our fan base on both social channels by enhancing our food photography and video assets, building brand loyalists through engagement, and testing a variety of

CONTINUED ON PAGE 34



NINETY NINE RESTAURANT & PUB

Ninety Nine Restaurant & Pub, a chain with \$9.99 entrées, moved up the Casual-Dining rankings with high scores for Value and Likelihood to Return.

CONTINUED FROM PAGE 32

targeted campaigns that resulted in meaningful conversations and connections,” he said.

The chain also had great success with limited-time offers promoting regional burgers. The Sin City Burger promotion that began late last year, a Las Vegas-inspired alleged hangover cure with bacon, cheese, haystack fried onions and a fried egg, was the chain’s best-selling limited-time offers.

Among Family-Dining chains, Cracker Barrel regained its leading position, winning top scores for Service, Reputation and Atmosphere.

Last year, First Watch pushed Cracker Barrel out of the lead

after six years as a top Consumer Picks brand. This year, however, consumers put First Watch in the No. 2 slot. The morning-daypart chain scored highest on the attributes of Cleanliness and Likely to Recommend.

Original Pancake House, meanwhile, won for Food Quality and Craveability.

Within the Limited Service/Mexican category, however, the big story was Chipotle Mexican Grill, proving Lombardi’s sentiment that it takes a long time to build a brand’s reputation, but that reputation can fall quickly.

Chipotle slid in the overall Limited-Service chains rankings from the modest No. 27 slot last year to No. 65 in this year’s survey, behind Noodles & Company, Sbarro, Au Bon Pain, and Zaxby’s.

Within the Limited Service/Mexican subcategory, it was nearly a clean sweep for Rubio’s,

which won top scores for all attributes except Food Quality, which went to fast-casual Qdoba Mexican Eats, and Value, which went to Del Taco.

And even though Chipotle beat Rubio’s ever so slightly on Food Quality, the Denver-based chain scored the lowest within the subcategory for Value and Menu Variety.

Chipotle also had low scores, along with Baja Fresh Mexican Grill and Taco Bell, for the attribute of Likely to Return. Among the eight Limited-Service Mexican brands on the survey, Chipotle ranked fourth.

The survey, however, was conducted in January, at a time

Today’s consumers, especially younger generations, are focused on the **quality and **sourcing** of ingredients more than ever.**

when Chipotle was emerging from multiple foodborne illness outbreaks that sent same-store sales plummeting 36.4 percent in January.

After launching a strict new food-safety program, Chipotle in February began a marketing blitz that included freebies along with messages of food quality and flavor. Officials at Chipotle contend the recovery will take time, and Wall Street analysts don’t expect same-store sales to turn positive until the end of the year at best.

While Chipotle suffered, other chains distinguished themselves in this year’s ranking. The 194-unit Rubio’s, meanwhile, moved up to fifth place among all Limited-Service brands.

Over the past two years, fish-taco specialist Rubio’s has been working to differentiate itself by beginning the process of changing its name and branding to focus more on seafood in a move to pull away from its fresh-Mex competitors.

What was once known as Rubio’s Fresh Mexican Grill is evolving into Rubio’s Coastal Grill. The chain is using the more simplified “Rubio’s” during the transition, until more restaurants are remodeled.

With that has come a new restaurant design and improved ingredients across the menu to cater to changing consumer desire to know the story behind the meal.

As part of a new “Made with a Mission” marketing theme, the chain this year shifted to using only all-natural chicken raised without antibiotics and bacon made without added nitrates or nitrites. The next step may include a shift to sustainable salmon, beef raised without antibiotics and tortillas made with simpler ingredients.

“Our promise to source quality ingredients started when we opened the first Rubio’s restaurant in San Diego more than 30 years ago,” said Ralph Rubio, the chain’s co-founder, in a statement earlier this year.

“It’s always been important to us that our guests feel good about what they are eating, and that starts with the ingredients we use. As guests’ expectations progress over time and the demand for simple ingredients and transparency grows, we will continue to evolve our ingredients to stay ahead of the changing expectations.” ■



Above: Smashburger’s Sin City burger. Smashburger has earned consumer love by focusing messaging on the quality of its food.

Right: Rubio’s has been working to differentiate itself from its fresh-Mex competitors with a new brand name and a focus on sustainable and antibiotic-free ingredients.



PHOTOS: TOP, SMASHBURGER; ABOVE, RUBIO’S COASTAL GRILL

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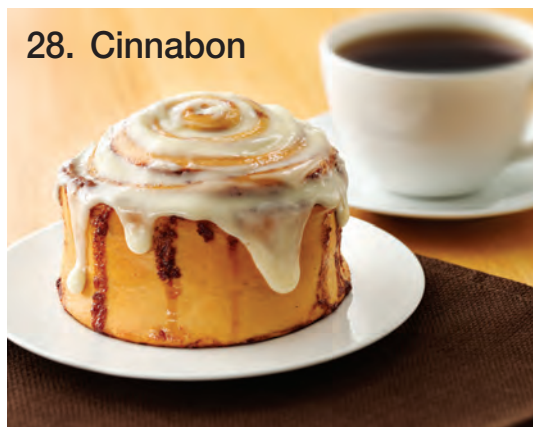
1. Ben & Jerry's
SEGMENT WINNER: Frozen Treats
TOP SCORE: Craveability
2. Häagen-Dazs
TOP SCORE: Cleanliness
3. In-N-Out Burger
SEGMENT WINNER: Burger
TOP SCORES: Food Quality • Reputation • Likely to Recommend
4. Chick-fil-A
SEGMENT WINNER: Chicken
TOP SCORE: Service
5. Rubio's**
SEGMENT WINNER: Mexican
TOP SCORE: Atmosphere
6. Smoothie King
SEGMENT WINNER: Beverage-Snack
7. Bruster's Real Ice Cream
8. Red Mango**

9. Pei Wei Asian Diner



9. Pei Wei Asian Diner
SEGMENT WINNER: Asian
10. Krispy Kreme Doughnuts
11. Godfather's Pizza
SEGMENT WINNER: Pizza
12. Corner Bakery Cafe**
SEGMENT WINNER: Bakery-Cafe
13. Baskin-Robbins
14. Blimpie America's Sub Shop**
SEGMENT WINNER: Sandwich
15. Pollo Tropical
16. Peet's Coffee & Tea
17. Papa Murphy's Take 'N' Bake Pizza
TOP SCORE: Likely to Return
18. Charley's Grilled Subs
19. Smashburger
20. Quiznos
21. Sarku Japan**
22. Marble Slab Creamery**
23. Starbucks Coffee
24. Panera Bread
25. Five Guys Burgers and Fries
26. McAlister's Deli
27. Jason's Deli

28. Cinnabon



28. Cinnabon
29. Culver's
30. Einstein Bros. Bagels
31. Penn Station East Coast Subs
32. Qdoba Mexican Eats
33. Rita's Italian Ice
34. Tropical Smoothie Café**
35. Raising Cane's Chicken Fingers
36. Marco's Pizza
37. Firehouse Subs
38. Cold Stone Creamery
39. Caribou Coffee**
40. Potbelly Sandwich Shop
41. Jamba Juice
42. Round Table Pizza**
43. Sizzler**
SEGMENT WINNER: Buffet
44. Baja Fresh Mexican Grill
45. Which Wich
46. Fuddruggers
47. Whataburger
48. Braum's Ice Cream & Dairy Stores
49. Bruegger's Bagels
50. Jet's Pizza
51. HomeTown Buffet**
52. Mrs. Fields Cookies
53. Jersey Mike's Subs
54. Great American Cookies
55. Togo's**
56. Papa John's Pizza
57. Tim Hortons
58. Souplantation/Sweet Tomatoes
59. Hungry Howie's Pizza**
60. El Pollo Loco
61. Noodles & Company
62. Sbarro
63. Au Bon Pain
64. Zaxby's
65. Chipotle Mexican Grill
66. Jimmy John's Gourmet Sandwiches
67. Boston Market
68. Pizza Hut
69. Carvel
70. Wingstop
71. Schlotzsky's

72. Subway
73. Golden Corral
TOP SCORE: Menu Variety
74. Dickey's Barbecue Pit
SEGMENT WINNER: Specialty
75. Ponderosa Steakhouse/
Bonanza Steakhouse
76. Steak 'n Shake
77. Panda Express
78. Domino's
79. Moe's Southwest Grill
80. Orange Julius
81. Wendy's
82. Fazoli's
83. Bojangles' Famous Chicken 'n Biscuits
84. Taco John's**
85. Ryan's
86. Church's Chicken
87. Sonic America's Drive-In
88. Popeyes Louisiana Kitchen
89. KFC
90. Carl's Jr.
91. Captain D's Seafood Kitchen
92. Checkers
93. Old Country Buffet
94. Arby's
95. CiCi's Pizza
96. Del Taco
97. Dunkin' Donuts
98. Wienerschnitzel
99. Jack in the Box
100. Rally's Hamburgers

101. Little Caesars Pizza



101. Little Caesars Pizza
TOP SCORE: Value
102. Hardee's
103. White Castle
104. Burger King
105. Taco Bell
106. Auntie Anne's
107. Dairy Queen
108. Long John Silver's
109. Krystal
110. McDonald's
111. A&W Restaurants
112. Chuck E. Cheese's

** 120-149 RESPONSES

ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES



PEI WEI ASIAN DINER

ASIAN

| CHAIN | OVERALL SCORE* | OVERALL LSR RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|---------------------|----------------|------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| PEI WEI ASIAN DINER | 64.6 | 9 | 70.4 | 48.4 | 68.5 | 60.0 | 65.8 | 67.4 | 60.7 | 68.3 | 68.0 | 64.1 |
| SARKU JAPAN** | 62.7 | 21 | 61.4 | 65.1 | 59.1 | 59.3 | 59.7 | 66.0 | 61.2 | 57.9 | 69.8 | 65.5 |
| NOODLES & COMPANY | 55.8 | 61 | 71.7 | 38.6 | 63.1 | 49.2 | 51.3 | 62.9 | 38.3 | 55.2 | 63.1 | 57.2 |
| PANDA EXPRESS | 53.3 | 77 | 55.1 | 49.2 | 53.3 | 50.8 | 56.1 | 51.1 | 43.9 | 59.2 | 60.7 | 61.4 |



CORNER BAKERY CAFE

BAKERY-CAFE

| CHAIN | OVERALL SCORE* | OVERALL LSR RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|-----------------------|----------------|------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| CORNER BAKERY CAFE** | 64.4 | 12 | 69.2 | 45.9 | 70.5 | 63.5 | 66.3 | 67.9 | 60.3 | 59.2 | 70.8 | 66.9 |
| PANERA BREAD | 62.2 | 24 | 80.8 | 40.1 | 66.7 | 57.0 | 59.3 | 72.5 | 61.0 | 50.7 | 67.2 | 61.4 |
| EINSTEIN BROS. BAGELS | 61.4 | 30 | 68.4 | 55.4 | 62.3 | 64.2 | 56.5 | 61.0 | 51.4 | 61.5 | 64.9 | 62.7 |
| BRUEGGER'S BAGELS | 58.0 | 49 | 66.9 | 51.3 | 65.3 | 60.1 | 51.8 | 59.6 | 46.6 | 50.6 | 62.9 | 61.5 |
| TIM HORTONS | 56.5 | 57 | 55.4 | 46.6 | 65.0 | 59.7 | 47.1 | 63.3 | 48.4 | 51.1 | 68.0 | 63.9 |
| AU BON PAIN | 55.6 | 63 | 65.2 | 43.5 | 69.1 | 49.1 | 55.0 | 60.5 | 47.4 | 44.7 | 58.3 | 58.8 |



SMOOTHIE KING

BEVERAGE-SNACK

| CHAIN | OVERALL SCORE* | OVERALL LSR RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|--------------------------|----------------|------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| SMOOTHIE KING | 67.0 | 6 | 72.8 | 52.7 | 67.1 | 70.3 | 69.6 | 67.0 | 58.0 | 69.6 | 72.4 | 71.4 |
| KRISPY KREME DOUGHNUTS | 64.5 | 10 | 75.6 | 53.7 | 66.5 | 56.9 | 48.2 | 72.0 | 53.3 | 73.9 | 77.9 | 71.2 |
| PEET'S COFFEE & TEA | 63.8 | 16 | 63.4 | 46.0 | 72.7 | 68.2 | 50.2 | 74.2 | 64.9 | 60.2 | 67.8 | 64.4 |
| STARBUCKS COFFEE | 62.3 | 23 | 65.7 | 26.5 | 73.4 | 72.1 | 50.4 | 78.7 | 66.0 | 59.7 | 67.2 | 71.0 |
| CINNABON | 61.5 | 28 | 76.1 | 47.0 | 59.2 | 64.7 | 41.2 | 68.6 | 49.8 | 68.7 | 76.2 | 62.2 |
| TROPICAL SMOOTHIE CAFÉ** | 60.9 | 34 | 64.7 | 43.2 | 63.0 | 61.7 | 65.9 | 61.2 | 54.3 | 60.5 | 69.7 | 69.2 |
| CARIBOU COFFEE** | 59.5 | 39 | 61.8 | 44.4 | 68.2 | 67.7 | 44.6 | 60.9 | 66.2 | 51.8 | 69.6 | 66.3 |
| JAMBA JUICE | 59.2 | 41 | 69.5 | 40.1 | 68.0 | 62.8 | 50.7 | 63.0 | 50.8 | 56.1 | 61.6 | 60.2 |
| MRS. FIELDS COOKIES | 57.5 | 52 | 64.4 | 44.0 | 60.2 | 54.1 | 44.6 | 64.6 | 47.4 | 66.6 | 62.9 | 58.5 |
| GREAT AMERICAN COOKIES | 57.5 | 54 | 69.1 | 41.8 | 57.9 | 62.0 | 49.3 | 65.6 | 44.2 | 58.9 | 65.6 | 60.6 |
| ORANGE JULIUS | 52.2 | 80 | 54.6 | 42.8 | 55.2 | 50.6 | 44.6 | 54.6 | 43.9 | 62.4 | 58.8 | 56.6 |
| DUNKIN' DONUTS | 46.5 | 97 | 43.8 | 42.3 | 48.9 | 46.4 | 36.5 | 58.3 | 32.5 | 48.2 | 60.5 | 66.6 |
| AUNTIE ANNE'S | 43.6 | 106 | 56.8 | 35.1 | 39.2 | 40.4 | 26.8 | 51.2 | 25.3 | 59.2 | 57.7 | 53.0 |



SIZZLER

BUFFET

| CHAIN | OVERALL SCORE* | OVERALL LSR RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|---|----------------|------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| SIZZLER** | 59.2 | 43 | 63.6 | 53.2 | 61.8 | 59.1 | 62.4 | 57.8 | 51.2 | 54.6 | 68.6 | 57.8 |
| HOMETOWN BUFFET** | 57.8 | 51 | 48.9 | 57.3 | 53.9 | 57.5 | 72.0 | 52.8 | 48.2 | 60.4 | 62.5 | 57.5 |
| SOULPLANTATION/SWEET TOMATOES | 56.4 | 58 | 66.3 | 51.2 | 65.2 | 43.1 | 54.6 | 51.7 | 50.8 | 51.6 | 66.0 | 67.6 |
| GOLDEN CORRAL | 53.8 | 73 | 51.8 | 54.6 | 46.1 | 50.7 | 76.1 | 56.7 | 41.8 | 47.6 | 60.7 | 59.1 |
| PONDEROSA STEAKHOUSE/ BONANZA STEAKHOUSE | 53.3 | 75 | 56.1 | 56.2 | 50.9 | 57.4 | 54.6 | 52.4 | 46.2 | 46.2 | 54.9 | 46.0 |
| RYAN'S | 50.2 | 85 | 46.5 | 44.5 | 48.5 | 51.8 | 66.9 | 47.1 | 40.7 | 43.0 | 62.5 | 54.5 |
| OLD COUNTRY BUFFET | 47.5 | 93 | 45.8 | 50.3 | 40.7 | 39.6 | 67.8 | 44.7 | 39.9 | 42.1 | 55.2 | 50.0 |



CHICK-FIL-A

CHICKEN

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|--|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| CHICK-FIL-A | 69.6 | 4 | 78.2 | 54.6 | 76.3 | 77.8 | 48.2 | 80.2 | 60.5 | 63.9 | 80.7 | 74.9 |
| POLLO TROPICAL | 63.8 | 15 | 71.3 | 67.7 | 66.8 | 61.2 | 54.5 | 64.7 | 53.6 | 54.7 | 72.9 | 71.7 |
| RAISING CANE'S CHICKEN FINGERS | 60.9 | 35 | 74.6 | 42.3 | 65.3 | 70.2 | 24.3 | 71.4 | 50.3 | 64.9 | 74.7 | 68.2 |
| EL POLLO LOCO | 56.1 | 60 | 68.7 | 52.5 | 56.3 | 52.4 | 51.1 | 54.2 | 42.0 | 57.5 | 66.6 | 61.5 |
| ZAXBY'S | 55.4 | 64 | 67.8 | 39.5 | 54.8 | 54.8 | 42.3 | 61.6 | 49.6 | 59.8 | 66.8 | 67.7 |
| BOSTON MARKET | 54.7 | 67 | 64.4 | 46.9 | 59.3 | 52.6 | 53.0 | 57.2 | 37.8 | 51.8 | 64.8 | 58.2 |
| WINGSTOP | 54.3 | 70 | 62.2 | 45.0 | 52.4 | 52.2 | 44.7 | 53.2 | 47.6 | 62.4 | 62.2 | 58.8 |
| BOJANGLES' FAMOUS CHICKEN 'N BISCUITS | 51.1 | 83 | 61.1 | 48.4 | 47.9 | 47.1 | 40.2 | 55.8 | 33.1 | 51.8 | 68.8 | 67.2 |
| CHURCH'S CHICKEN | 50.2 | 86 | 55.6 | 58.8 | 43.7 | 47.6 | 41.3 | 52.4 | 39.6 | 52.3 | 57.3 | 59.4 |
| POPEYES LOUISIANA KITCHEN | 50.0 | 88 | 63.0 | 48.9 | 42.2 | 44.6 | 40.2 | 52.7 | 32.7 | 59.1 | 61.4 | 59.7 |
| KFC | 48.6 | 89 | 60.0 | 38.6 | 41.4 | 46.2 | 40.7 | 52.1 | 34.5 | 59.0 | 60.6 | 59.3 |

ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES

*OVERALL SCORES ARE AN AVERAGE OF ATTRIBUTE SCORES, EXCEPT FOR LIKELY TO RETURN, AND ARE WEIGHTED BY ATTRIBUTE IMPORTANCE. ATTRIBUTE SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID A CHAIN WAS "OUTSTANDING" OR "ABOVE AVERAGE" IN THAT AREA. LIKELY TO RETURN SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID THEY "DEFINITELY" OR "PROBABLY" WILL VISIT A CHAIN AGAIN. **120-149 RESPONSES



IN-N-OUT BURGER

BURGER

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|-----------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| IN-N-OUT BURGER | 70.6 | 3 | 84.5 | 71.8 | 72.5 | 75.4 | 34.6 | 85.0 | 53.6 | 72.7 | 82.5 | 74.3 |
| SMASHBURGER | 62.8 | 19 | 79.0 | 53.4 | 66.8 | 66.2 | 53.0 | 61.1 | 52.3 | 62.1 | 67.9 | 67.2 |
| FIVE GUYS BURGERS AND FRIES | 62.1 | 25 | 82.9 | 45.3 | 56.5 | 64.3 | 34.6 | 78.4 | 47.6 | 70.6 | 75.0 | 66.3 |
| CULVER'S | 61.5 | 29 | 72.7 | 44.3 | 64.7 | 65.0 | 61.0 | 68.1 | 47.4 | 56.8 | 70.5 | 63.8 |
| FUDDRUCKERS | 58.5 | 46 | 71.0 | 44.7 | 60.1 | 47.6 | 48.0 | 62.0 | 58.2 | 61.0 | 71.9 | 61.1 |
| WHATABURGER | 58.3 | 47 | 69.4 | 45.8 | 52.9 | 55.1 | 53.3 | 69.2 | 41.7 | 60.8 | 74.2 | 72.8 |
| STEAK 'N SHAKE | 53.3 | 76 | 50.4 | 64.2 | 49.5 | 44.2 | 56.2 | 50.0 | 45.7 | 56.8 | 60.6 | 60.2 |
| WENDY'S | 51.7 | 81 | 57.9 | 55.3 | 47.3 | 50.3 | 53.9 | 53.3 | 34.0 | 50.9 | 57.4 | 59.1 |
| SONIC AMERICA'S DRIVE-IN | 50.1 | 87 | 50.3 | 47.3 | 37.0 | 52.0 | 65.6 | 50.5 | 36.6 | 53.8 | 59.2 | 67.5 |
| CARL'S JR. | 48.2 | 90 | 53.7 | 46.3 | 44.6 | 44.1 | 53.7 | 50.7 | 32.6 | 49.0 | 53.6 | 58.7 |
| CHECKERS | 47.8 | 92 | 52.3 | 61.8 | 37.9 | 44.0 | 46.0 | 43.4 | 32.2 | 53.5 | 57.3 | 54.2 |
| JACK IN THE BOX | 45.8 | 99 | 43.6 | 49.5 | 43.2 | 42.1 | 57.9 | 41.4 | 28.7 | 49.8 | 54.3 | 62.0 |
| RALLY'S HAMBURGERS | 45.5 | 100 | 40.5 | 50.1 | 38.6 | 41.0 | 48.4 | 44.6 | 34.4 | 53.1 | 55.3 | 49.5 |
| HARDEE'S | 45.3 | 102 | 53.3 | 40.0 | 44.1 | 40.4 | 50.1 | 41.7 | 34.2 | 46.0 | 55.8 | 59.1 |
| WHITE CASTLE | 45.3 | 103 | 39.7 | 55.1 | 37.6 | 39.1 | 32.8 | 48.7 | 27.7 | 69.1 | 63.2 | 67.8 |
| BURGER KING | 44.5 | 104 | 45.4 | 50.6 | 41.9 | 42.2 | 43.7 | 39.0 | 26.4 | 46.5 | 51.2 | 59.0 |
| KRYSTAL | 40.3 | 109 | 31.3 | 58.9 | 38.7 | 36.0 | 27.9 | 35.3 | 23.1 | 50.8 | 56.2 | 60.0 |
| MCDONALD'S | 39.5 | 110 | 28.6 | 53.0 | 39.0 | 39.1 | 39.4 | 40.2 | 25.7 | 39.3 | 43.6 | 61.1 |
| A&W RESTAURANTS | 38.6 | 111 | 40.2 | 36.4 | 39.9 | 39.5 | 28.3 | 44.5 | 31.6 | 40.2 | 45.2 | 37.8 |



BEN & JERRY'S

FROZEN TREATS

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|----------------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| BEN & JERRY'S | 73.4 | 1 | 83.6 | 52.0 | 71.9 | 75.9 | 74.7 | 81.5 | 65.1 | 77.2 | 77.5 | 66.5 |
| HÄAGEN-DAZS | 70.9 | 2 | 79.8 | 53.2 | 77.9 | 65.9 | 64.3 | 77.5 | 62.8 | 74.4 | 78.1 | 69.8 |
| BRUSTER'S REAL ICE CREAM | 65.6 | 7 | 72.7 | 57.4 | 66.0 | 68.3 | 64.5 | 67.2 | 54.1 | 64.3 | 73.7 | 63.8 |
| RED MANGO** | 64.7 | 8 | 70.7 | 60.1 | 71.5 | 60.2 | 60.5 | 67.1 | 60.5 | 60.5 | 62.6 | 63.0 |
| BASKIN-ROBBINS | 64.2 | 13 | 72.3 | 49.6 | 63.8 | 61.3 | 66.8 | 66.6 | 52.2 | 70.8 | 73.3 | 66.2 |
| MARBLE SLAB CREAMERY** | 62.5 | 22 | 72.7 | 53.0 | 63.5 | 58.7 | 66.0 | 62.5 | 55.2 | 63.7 | 62.1 | 55.1 |
| RITA'S ITALIAN ICE | 61.0 | 33 | 66.3 | 55.1 | 60.1 | 62.7 | 54.7 | 66.7 | 46.4 | 67.5 | 73.8 | 46.7 |
| COLD STONE CREAMERY | 59.9 | 38 | 77.9 | 25.8 | 62.5 | 59.2 | 61.7 | 67.7 | 46.3 | 68.7 | 66.5 | 49.9 |
| BRAUM'S ICE CREAM & DAIRY STORES | 58.2 | 48 | 65.5 | 53.6 | 55.2 | 54.5 | 52.0 | 63.2 | 50.0 | 57.9 | 70.9 | 66.6 |
| CARVEL | 54.4 | 69 | 68.1 | 41.8 | 51.9 | 54.0 | 48.2 | 56.1 | 39.3 | 59.9 | 67.6 | 65.5 |
| DAIRY QUEEN | 43.2 | 107 | 44.9 | 38.1 | 43.7 | 42.0 | 40.2 | 48.5 | 26.9 | 49.5 | 55.0 | 49.9 |



RUBIO'S

MEXICAN

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|--------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| RUBIO'S** | 67.0 | 5 | 70.6 | 55.8 | 70.2 | 69.8 | 59.4 | 62.7 | 66.4 | 63.9 | 78.9 | 75.7 |
| QDOBA MEXICAN EATS | 61.0 | 32 | 72.8 | 56.6 | 60.2 | 61.2 | 51.3 | 62.2 | 48.1 | 62.2 | 69.9 | 61.5 |
| BAJA FRESH MEXICAN GRILL | 59.1 | 44 | 69.0 | 55.8 | 60.1 | 56.8 | 55.8 | 59.1 | 52.9 | 56.3 | 58.6 | 53.3 |
| CHIPOTLE MEXICAN GRILL | 55.1 | 65 | 70.9 | 47.3 | 55.2 | 59.6 | 42.8 | 47.3 | 46.2 | 60.5 | 58.5 | 59.4 |
| MOE'S SOUTHWEST GRILL | 52.5 | 79 | 63.3 | 50.1 | 47.7 | 55.5 | 43.2 | 51.3 | 40.8 | 54.2 | 63.6 | 63.2 |
| TACO JOHN'S** | 50.4 | 84 | 50.6 | 54.9 | 42.0 | 50.6 | 46.2 | 45.9 | 41.2 | 56.6 | 62.2 | 65.7 |
| DEL TACO | 46.8 | 96 | 38.0 | 65.9 | 43.9 | 40.7 | 55.4 | 36.7 | 30.7 | 50.4 | 56.4 | 62.3 |
| TACO BELL | 43.6 | 105 | 37.9 | 57.6 | 35.9 | 39.2 | 50.2 | 39.9 | 25.6 | 51.1 | 51.0 | 59.8 |



GODFATHER'S PIZZA

PIZZA

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|-----------------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| GODFATHER'S PIZZA | 64.5 | 11 | 69.4 | 59.4 | 61.9 | 63.8 | 63.5 | 68.2 | 53.9 | 63.1 | 70.1 | 64.5 |
| PAPA MURPHY'S TAKE 'N' BAKE PIZZA | 63.4 | 17 | 76.8 | 70.0 | 65.0 | 61.7 | 50.5 | 66.7 | 35.6 | 59.6 | 73.1 | 77.2 |
| MARCO'S PIZZA | 60.8 | 36 | 69.9 | 58.4 | 64.3 | 62.2 | 52.4 | 54.6 | 45.3 | 62.2 | 71.1 | 64.8 |
| ROUND TABLE PIZZA** | 59.2 | 42 | 78.5 | 44.7 | 51.3 | 57.1 | 49.1 | 59.0 | 50.0 | 66.1 | 72.8 | 63.3 |
| JET'S PIZZA | 57.8 | 50 | 74.6 | 50.0 | 49.9 | 55.9 | 48.9 | 63.2 | 36.0 | 62.6 | 77.4 | 68.2 |
| PAPA JOHN'S PIZZA | 56.9 | 56 | 68.0 | 54.5 | 54.9 | 54.9 | 47.3 | 61.0 | 38.0 | 57.7 | 66.1 | 63.2 |
| HUNGRY HOWIE'S PIZZA** | 56.2 | 59 | 57.3 | 56.3 | 53.8 | 55.3 | 51.1 | 58.2 | 40.6 | 57.4 | 69.8 | 67.8 |
| SBARRO | 55.7 | 62 | 63.2 | 51.5 | 53.3 | 53.2 | 53.3 | 54.7 | 46.3 | 60.8 | 60.2 | 52.2 |
| PIZZA HUT | 54.5 | 68 | 62.5 | 51.5 | 51.3 | 50.7 | 51.4 | 57.0 | 40.2 | 55.7 | 65.9 | 64.2 |
| DOMINO'S | 52.9 | 78 | 55.0 | 58.3 | 49.8 | 57.0 | 49.6 | 53.4 | 32.9 | 53.1 | 60.9 | 65.2 |
| FAZOLI'S | 51.4 | 82 | 53.6 | 47.2 | 54.3 | 54.4 | 46.5 | 47.0 | 45.7 | 53.0 | 56.7 | 49.5 |
| CICI'S PIZZA | 47.2 | 95 | 38.7 | 70.4 | 39.4 | 44.2 | 48.0 | 44.2 | 42.7 | 42.1 | 53.5 | 56.2 |
| LITTLE CAESARS PIZZA | 45.5 | 101 | 37.8 | 76.6 | 44.9 | 52.1 | 22.5 | 40.2 | 26.7 | 40.2 | 57.6 | 63.1 |
| CHUCK E. CHEESE'S | 32.4 | 112 | 28.3 | 20.3 | 29.9 | 35.3 | 22.1 | 45.2 | 47.0 | 25.1 | 45.5 | 43.5 |

PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES; BEN & JERRY'S: JAMIE MCCARTHY/GETTY IMAGES

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BLIMPIE AMERICA'S SUB SHOP

ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES

SANDWICH

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|---------------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| BLIMPIE AMERICA'S SUB SHOP ** | 64.0 | 14 | 71.1 | 61.2 | 60.7 | 65.8 | 63.3 | 59.1 | 53.9 | 62.5 | 71.4 | 66.1 |
| CHARLEY'S GRILLED SUBS | 62.9 | 18 | 68.4 | 60.0 | 56.6 | 63.8 | 56.5 | 61.0 | 56.5 | 69.5 | 70.4 | 63.4 |
| QUIZNOS | 62.8 | 20 | 70.2 | 53.6 | 65.1 | 63.0 | 60.5 | 61.2 | 51.5 | 61.9 | 68.2 | 66.0 |
| McALISTER'S DELI | 62.0 | 26 | 74.6 | 37.2 | 69.9 | 62.0 | 71.7 | 66.6 | 52.3 | 49.9 | 66.4 | 56.8 |
| JASON'S DELI | 61.7 | 27 | 72.1 | 51.6 | 63.6 | 61.1 | 71.1 | 66.7 | 46.1 | 53.1 | 65.6 | 60.1 |
| PENN STATION EAST COAST SUBS | 61.4 | 31 | 78.5 | 44.7 | 65.8 | 65.8 | 51.8 | 63.1 | 42.4 | 58.4 | 74.4 | 68.8 |
| FIREHOUSE SUBS | 59.9 | 37 | 76.0 | 42.0 | 60.2 | 60.5 | 53.3 | 64.4 | 52.0 | 59.5 | 68.2 | 59.2 |
| POTBELLY SANDWICH SHOP | 59.4 | 40 | 67.9 | 49.5 | 65.2 | 60.7 | 48.5 | 56.9 | 58.6 | 50.0 | 67.7 | 60.3 |
| WHICH WICH | 58.7 | 45 | 63.6 | 43.0 | 67.6 | 58.3 | 65.9 | 55.3 | 48.2 | 56.2 | 66.5 | 63.6 |
| JERSEY MIKE'S SUBS | 57.5 | 53 | 69.5 | 43.7 | 61.8 | 65.4 | 45.2 | 60.5 | 43.2 | 53.4 | 69.0 | 60.7 |
| TOGO'S ** | 57.3 | 55 | 63.9 | 44.1 | 60.9 | 65.8 | 62.3 | 53.6 | 45.5 | 51.1 | 60.6 | 54.8 |
| JIMMY JOHN'S GOURMET SANDWICHES | 55.0 | 66 | 65.1 | 40.8 | 56.9 | 69.7 | 42.4 | 61.0 | 41.4 | 51.3 | 64.7 | 62.4 |
| SCHLOTZSKY'S | 54.3 | 71 | 68.4 | 33.8 | 55.8 | 54.6 | 51.4 | 56.5 | 44.1 | 52.9 | 68.4 | 58.7 |
| SUBWAY | 54.0 | 72 | 58.9 | 58.3 | 56.2 | 55.3 | 54.1 | 54.5 | 36.3 | 45.5 | 59.5 | 61.9 |
| ARBY'S | 47.4 | 94 | 57.9 | 41.8 | 46.0 | 44.5 | 48.7 | 44.0 | 34.5 | 48.8 | 57.1 | 54.0 |
| WIENERSCHNITZEL | 46.5 | 98 | 47.1 | 54.2 | 38.8 | 50.7 | 40.9 | 38.9 | 36.2 | 51.1 | 61.0 | 62.1 |



DICKEY'S BARBECUE PIT

SPECIALTY

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|-----------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| DICKEY'S BARBECUE PIT | 53.6 | 74 | 58.7 | 43.1 | 54.0 | 55.1 | 48.8 | 58.7 | 44.8 | 55.8 | 58.2 | 50.9 |
| CAPTAIN D'S SEAFOOD KITCHEN | 47.8 | 91 | 51.2 | 47.8 | 44.1 | 43.4 | 47.7 | 45.8 | 34.2 | 53.2 | 59.7 | 62.0 |
| LONG JOHN SILVER'S | 42.7 | 108 | 47.0 | 40.3 | 40.9 | 43.2 | 38.2 | 42.0 | 31.6 | 45.2 | 51.2 | 47.6 |

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Consumer Picks report continues on page 83



BURGERFI

WILL NATURALLY BEEF UP YOUR BUSINESS PORTFOLIO.



2013 FRANCHISE OF THE YEAR*



'15 BEST NYC VEGGIE BURGER
'13 BEST NYC FOOD



TOP 50 BRANDS 2015 AND 2014



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1. The Cheesecake Factory

- 1. The Cheesecake Factory
SEGMENT WINNER: Varied menu
TOP SCORE: Food Quality • Menu Variety
Reputation • Likely to Recommend
- 2. The Melting Pot
TOP SCORES: Service • Atmosphere
- 3. Bonefish Grill
SEGMENT WINNER: Seafood
TOP SCORE: Cleanliness
- 4. Red Lobster
- 5. Romano's Macaroni Grill
SEGMENT WINNER: Italian/Pizza
- 6. Carrabba's Italian Grill
- 7. Olive Garden
- 8. Ninety Nine Restaurant & Pub**
TOP SCORES: Value • Likely to Return
- 9. Mellow Mushroom Pizza Bakers
- 10. Chevys Fresh Mex
- 11. P.F. Chang's China Bistro

** 120-149 RESPONSES

- 12. BJ's Restaurant & Brewhouse
- 13. Texas Roadhouse
SEGMENT WINNER: Steak
- 14. Mimi's Cafe
- 15. Buca di Beppo
- 16. Johnny Carino's/Carino's Italian
- 17. Genghis Grill**
TOP SCORE: Craveability
- 18. Cheddar's Scratch Kitchen
- 19. Hard Rock Cafe
- 20. Old Chicago Pizza & Taproom
- 21. Lone Star Steakhouse
- 22. LongHorn Steakhouse
- 23. Outback Steakhouse
- 24. Joe's Crab Shack
- 25. California Pizza Kitchen
- 26. O'Charley's
- 27. Red Robin Gourmet Burgers & Brews



27. Red Robin Gourmet Burgers & Brews

- 28. Famous Dave's
- 29. TGI Fridays
- 30. Beef 'O' Brady's**



31. Applebee's Neighborhood Grill & Bar

- 31. Applebee's Neighborhood Grill & Bar
- 32. Sonny's Real Pit Bar-B-Q**
- 33. Hooters
- 34. Dave & Buster's
- 35. Chili's Grill & Bar
- 36. Uno Chicago Grill/Uno Pizzeria & Grill
- 37. On the Border Mexican Grill & Cantina
- 38. Ruby Tuesday
- 39. Logan's Roadhouse
- 40. Buffalo Wild Wings Grill & Bar



40. Buffalo Wild Wings Grill & Bar

ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES

Start planning now for the SEPTEMBER Franchise Focus

FranchiseFocus

September 19, 2016

Closing: August 16, 2016 • Materials Due: August 19, 2016

Contact: Leslie Wolowitz
212-204-4399 • leslie.wolowitz@penton.com

ITALIAN/PIZZA



ROMANO'S MACARONI GRILL

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|----------------------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|------------|-------------|--------------|---------------------|------------------|
| ROMANO'S MACARONI GRILL | 70.5 | 5 | 77.3 | 48.2 | 83.1 | 74.8 | 66.1 | 69.0 | 75.7 | 62.2 | 70.8 | 62.6 |
| CARRABBA'S ITALIAN GRILL | 70.4 | 6 | 80.7 | 42.1 | 77.2 | 75.7 | 70.8 | 74.6 | 71.8 | 61.6 | 71.7 | 59.3 |
| OLIVE GARDEN | 70.0 | 7 | 74.8 | 53.4 | 74.5 | 74.0 | 68.1 | 73.1 | 69.5 | 64.7 | 74.8 | 64.2 |
| MELLOW MUSHROOM PIZZA BAKERS | 69.0 | 9 | 78.6 | 43.8 | 68.6 | 71.5 | 76.3 | 70.9 | 69.2 | 76.3 | 61.7 | |
| BUCA DI BEPPO | 66.8 | 15 | 78.6 | 53.1 | 62.7 | 68.5 | 69.1 | 67.0 | 67.7 | 57.0 | 74.9 | 61.4 |
| JOHNNY CARINO'S/CARINO'S ITALIAN | 66.4 | 16 | 70.8 | 50.3 | 73.9 | 71.6 | 62.8 | 65.2 | 64.7 | 58.5 | 71.3 | 63.5 |

SEAFOOD



BONEFISH GRILL

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| BONEFISH GRILL | 71.7 | 3 | 83.3 | 38.5 | 84.0 | 72.7 | 66.4 | 83.2 | 74.5 | 58.2 | 77.6 | 60.5 |
| RED LOBSTER | 71.1 | 4 | 81.9 | 43.2 | 73.5 | 75.5 | 69.3 | 75.5 | 69.3 | 70.1 | 72.8 | 60.1 |
| JOE'S CRAB SHACK | 64.9 | 24 | 67.5 | 52.3 | 60.7 | 70.1 | 61.1 | 69.3 | 65.2 | 62.3 | 73.8 | 58.0 |

STEAK



TEXAS ROADHOUSE

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|----------------------|----------------|---------------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| TEXAS ROADHOUSE | 67.5 | 13 | 78.5 | 55.7 | 60.2 | 72.6 | 63.6 | 70.0 | 66.1 | 63.6 | 73.9 | 60.2 |
| LONE STAR STEAKHOUSE | 65.4 | 21 | 70.5 | 48.1 | 73.9 | 65.0 | 62.8 | 65.2 | 63.4 | 61.2 | 73.7 | 60.6 |
| LONGHORN STEAKHOUSE | 65.2 | 22 | 78.2 | 37.7 | 72.0 | 71.4 | 62.8 | 67.3 | 62.0 | 57.3 | 69.6 | 58.7 |
| OUTBACK STEAKHOUSE | 65.1 | 23 | 75.3 | 42.8 | 69.0 | 71.9 | 62.2 | 68.3 | 62.3 | 57.7 | 66.7 | 58.6 |
| LOGAN'S ROADHOUSE | 54.9 | 39 | 63.6 | 41.0 | 51.1 | 55.7 | 50.9 | 57.2 | 59.4 | 46.1 | 65.0 | 53.7 |

VARIED MENU



THE CHEESECAKE FACTORY

| CHAIN | OVERALL SCORE* | OVERALL CASUAL RANK | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|--|----------------|---------------------|--------------|-------|-------------|---------|--------------|-------------|-------------|--------------|---------------------|------------------|
| THE CHEESECAKE FACTORY | 74.2 | 1 | 83.5 | 43.3 | 81.6 | 73.6 | 81.6 | 83.3 | 73.1 | 66.8 | 77.8 | 62.4 |
| THE MELTING POT | 73.0 | 2 | 78.9 | 48.7 | 75.1 | 76.4 | 63.2 | 79.7 | 80.8 | 69.6 | 74.9 | 55.4 |
| NINETY NINE RESTAURANT & PUB | 69.9 | 8 | 65.9 | 72.3 | 73.5 | 69.8 | 69.7 | 65.9 | 63.9 | 73.5 | 71.1 | |
| CHEVYS FRESH MEX | 68.9 | 10 | 69.0 | 60.2 | 70.6 | 72.2 | 68.5 | 68.2 | 63.6 | 65.5 | 71.6 | 62.9 |
| P.F. CHANG'S CHINA BISTRO | 68.3 | 11 | 74.5 | 40.6 | 75.3 | 67.2 | 70.1 | 74.9 | 73.4 | 63.1 | 71.7 | 60.1 |
| BJ'S RESTAURANT & BREWHOUSE | 68.0 | 12 | 75.8 | 45.0 | 74.3 | 66.5 | 77.5 | 68.8 | 70.8 | 55.3 | 72.1 | 66.4 |
| MIMI'S CAFE | 66.9 | 14 | 75.4 | 55.2 | 65.8 | 73.3 | 71.0 | 67.4 | 66.2 | 58.1 | 66.2 | 61.5 |
| GENGHIS GRILL** | 66.2 | 17 | 71.1 | 53.2 | 68.6 | 62.3 | 66.7 | 63.6 | 63.9 | 72.3 | 72.5 | 67.9 |
| CHEDDAR'S SCRATCH KITCHEN | 66.0 | 18 | 72.5 | 59.2 | 69.4 | 65.2 | 67.6 | 68.5 | 65.9 | 52.2 | 68.9 | 57.3 |
| HARD ROCK CAFE | 65.9 | 19 | 68.5 | 52.5 | 66.1 | 66.3 | 59.2 | 73.4 | 75.2 | 60.4 | 66.3 | 59.1 |
| OLD CHICAGO PIZZA & TAPROOM | 65.6 | 20 | 68.1 | 50.5 | 64.7 | 69.9 | 68.3 | 65.5 | 65.0 | 64.6 | 69.4 | 62.4 |
| CALIFORNIA PIZZA KITCHEN | 63.1 | 25 | 77.8 | 39.4 | 66.0 | 65.7 | 62.3 | 65.6 | 58.8 | 60.3 | 64.9 | 59.4 |
| O'CHARLEY'S | 62.7 | 26 | 73.5 | 47.8 | 66.2 | 60.4 | 64.5 | 62.2 | 60.1 | 55.6 | 70.3 | 62.9 |
| RED ROBIN GOURMET BURGERS & BREWS | 62.3 | 27 | 73.7 | 42.1 | 64.9 | 67.0 | 62.8 | 61.1 | 59.8 | 60.8 | 63.6 | 56.4 |
| FAMOUS DAVE'S | 61.8 | 28 | 71.6 | 46.5 | 58.7 | 64.4 | 58.8 | 66.4 | 62.9 | 58.1 | 62.5 | 50.8 |
| TGI FRIDAYS | 61.6 | 29 | 66.5 | 49.3 | 63.5 | 68.0 | 67.9 | 62.1 | 54.6 | 50.5 | 65.9 | 60.6 |
| BEEF 'O' BRADY'S** | 60.4 | 30 | 60.1 | 57.9 | 65.6 | 64.1 | 58.0 | 56.8 | 57.5 | 49.6 | 69.3 | 65.0 |
| APPLEBEE'S NEIGHBORHOOD GRILL & BAR | 58.8 | 31 | 65.7 | 45.4 | 62.1 | 61.1 | 63.4 | 60.1 | 58.0 | 46.9 | 62.4 | 56.1 |
| SONNY'S REAL PIT BAR-B-Q** | 58.3 | 32 | 69.8 | 58.5 | 56.0 | 50.7 | 47.6 | 64.0 | 48.3 | 59.8 | 69.2 | 59.3 |
| HOOTERS | 58.0 | 33 | 55.3 | 46.5 | 58.3 | 68.0 | 46.8 | 64.6 | 70.0 | 49.9 | 57.6 | 56.3 |
| DAVE & BUSTER'S | 57.3 | 34 | 54.2 | 37.9 | 58.2 | 58.9 | 60.7 | 62.3 | 69.6 | 48.8 | 66.2 | 55.3 |
| CHILI'S GRILL & BAR | 56.8 | 35 | 62.8 | 42.0 | 56.2 | 60.4 | 67.1 | 55.7 | 51.3 | 49.1 | 63.0 | 56.5 |
| UNO CHICAGO GRILL/UNO PIZZERIA & GRILL | 56.7 | 36 | 63.5 | 42.9 | 62.5 | 59.8 | 54.8 | 55.9 | 49.1 | 64.2 | 57.9 | |
| ON THE BORDER MEXICAN GRILL & CANTINA | 56.3 | 37 | 58.1 | 45.4 | 58.1 | 54.7 | 62.4 | 53.4 | 55.7 | 53.8 | 62.5 | 50.0 |
| RUBY TUESDAY | 55.7 | 38 | 62.5 | 40.7 | 56.6 | 59.3 | 61.9 | 53.0 | 55.2 | 48.0 | 60.3 | 50.9 |
| BUFFALO WILD WINGS GRILL & BAR | 54.3 | 40 | 58.5 | 38.3 | 55.2 | 58.3 | 45.9 | 59.0 | 59.7 | 52.7 | 56.1 | 53.6 |

ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES

*OVERALL SCORES ARE AN AVERAGE OF ATTRIBUTE SCORES, EXCEPT FOR LIKELY TO RETURN, AND ARE WEIGHTED BY ATTRIBUTE IMPORTANCE. ATTRIBUTE SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID A CHAIN WAS "OUTSTANDING" OR "ABOVE AVERAGE" IN THAT AREA. LIKELY TO RETURN SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID THEY "DEFINITELY" OR "PROBABLY" WILL VISIT A CHAIN AGAIN. **120-149 RESPONSES

FAMILY DINING

- 1. Cracker Barrel Old Country Store
TOP SCORES: Service • Reputation • Atmosphere
- 2. First Watch**
TOP SCORES: Cleanliness • Likely to Recommend
- 3. Shari's Cafe and Pies**
TOP SCORES: Menu Variety • Likely to Return
- 4. Original Pancake House
TOP SCORES: Food Quality • Craveability
- 5. Bob Evans Restaurants
- 6. Shoney's
TOP SCORE: Value
- 7. Coco's Bakery Restaurant
- 8. Johnny Rockets
- 9. IHOP
- 10. Big Boy
- 11. Perkins Restaurant & Bakery
- 12. Village Inn
- 13. Huddle House**
- 14. Denny's
- 15. Friendly's
- 16. Waffle House



1. Cracker Barrel Old Country Store

COMPLETE RANKINGS (BLUE BOLDFACE: HIGHEST SCORE IN ATTRIBUTE CATEGORY)

| CHAIN | OVERALL SCORE* | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|----------------------------------|----------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| CRACKER BARREL OLD COUNTRY STORE | 68.0 | 72.4 | 53.8 | 70.4 | 70.9 | 72.0 | 73.6 | 69.0 | 58.5 | 70.5 | 58.0 |
| FIRST WATCH** | 65.5 | 72.0 | 50.7 | 70.5 | 64.9 | 66.8 | 72.5 | 59.6 | 53.8 | 72.0 | 59.0 |
| SHARI'S CAFE AND PIES** | 64.3 | 58.4 | 53.3 | 66.3 | 67.8 | 72.5 | 62.0 | 61.7 | 60.3 | 67.7 | 65.2 |
| ORIGINAL PANCAKE HOUSE | 64.0 | 76.5 | 59.3 | 59.1 | 65.9 | 65.9 | 63.8 | 52.9 | 60.7 | 66.1 | 59.3 |
| BOB EVANS RESTAURANTS | 62.9 | 67.0 | 57.6 | 65.9 | 64.5 | 69.3 | 64.3 | 53.6 | 50.4 | 69.0 | 64.4 |
| SHONEY'S | 61.0 | 62.7 | 60.6 | 62.0 | 65.9 | 64.9 | 56.4 | 51.9 | 54.3 | 65.1 | 55.2 |
| COCO'S BAKERY RESTAURANT | 59.9 | 61.4 | 46.3 | 68.2 | 62.8 | 62.8 | 56.8 | 53.4 | 53.2 | 67.4 | 59.9 |
| JOHNNY ROCKETS | 57.3 | 61.3 | 44.6 | 58.8 | 64.1 | 56.6 | 54.5 | 59.6 | 53.7 | 55.5 | 48.3 |
| IHOP | 57.2 | 61.0 | 49.3 | 54.6 | 59.0 | 65.9 | 57.4 | 47.8 | 57.7 | 63.5 | 54.2 |
| BIG BOY | 55.4 | 57.6 | 52.1 | 54.0 | 57.8 | 55.4 | 60.2 | 48.8 | 51.7 | 58.8 | 57.8 |
| PERKINS RESTAURANT & BAKERY | 55.0 | 52.0 | 49.1 | 62.4 | 60.8 | 64.9 | 52.0 | 44.2 | 48.0 | 55.9 | 54.6 |
| VILLAGE INN | 54.2 | 51.4 | 56.6 | 54.3 | 59.6 | 64.8 | 51.1 | 44.7 | 45.4 | 55.2 | 51.8 |
| HUDDLE HOUSE** | 52.9 | 53.1 | 52.8 | 53.0 | 57.1 | 54.2 | 46.3 | 43.7 | 48.9 | 61.6 | 56.2 |
| DENNY'S | 51.9 | 51.7 | 56.3 | 49.2 | 55.5 | 65.4 | 46.2 | 41.0 | 44.0 | 51.8 | 52.8 |
| FRIENDLY'S | 48.6 | 50.2 | 47.2 | 53.5 | 47.6 | 50.2 | 47.3 | 35.6 | 46.2 | 55.3 | 53.6 |
| WAFFLE HOUSE | 42.9 | 40.0 | 57.5 | 32.7 | 46.5 | 46.5 | 34.8 | 31.1 | 46.0 | 49.9 | 56.1 |



ORIGINAL PANCAKE HOUSE

FINE DINING

- 1. Morton's the Steakhouse
TOP SCORES: Atmosphere • Craveability • Value
- 2. Ruth's Chris Steak House
TOP SCORES: Food Quality • Cleanliness • Service • Menu Variety • Reputation • Likely to Recommend
- 3. The Capital Grille**
TOP SCORE: Likely to Return
- 4. Fleming's Prime Steakhouse & Wine Bar
- 5. McCormick & Schmick's**



1. Morton's the Steakhouse

COMPLETE RANKINGS (BLUE BOLDFACE: HIGHEST SCORE IN ATTRIBUTE CATEGORY)

| CHAIN | OVERALL SCORE* | FOOD QUALITY | VALUE | CLEANLINESS | SERVICE | MENU VARIETY | REPUTATION | ATMOSPHERE | CRAVEABILITY | LIKELY TO RECOMMEND | LIKELY TO RETURN |
|---------------------------------------|----------------|--------------|-------------|-------------|-------------|--------------|-------------|-------------|--------------|---------------------|------------------|
| MORTON'S THE STEAKHOUSE | 79.9 | 84.1 | 68.8 | 82.3 | 82.8 | 73.9 | 75.9 | 84.8 | 79.6 | 79.6 | 70.7 |
| RUTH'S CHRIS STEAK HOUSE | 79.7 | 91.5 | 53.5 | 87.0 | 84.8 | 75.0 | 82.0 | 80.3 | 74.0 | 82.5 | 70.1 |
| THE CAPITAL GRILLE** | 75.9 | 84.9 | 62.0 | 76.3 | 82.3 | 72.6 | 76.0 | 75.0 | 68.6 | 77.5 | 71.4 |
| FLEMING'S PRIME STEAKHOUSE & WINE BAR | 75.7 | 83.0 | 58.6 | 80.2 | 75.1 | 72.4 | 75.8 | 75.5 | 75.4 | 77.7 | 71.3 |
| MCCORMICK & SCHMICK'S** | 75.0 | 77.1 | 61.5 | 75.4 | 79.8 | 71.5 | 81.6 | 78.8 | 70.2 | 72.5 | 64.8 |



RUTH'S CHRIS STEAK HOUSE

*OVERALL SCORES ARE AN AVERAGE OF ATTRIBUTE SCORES, EXCEPT FOR LIKELY TO RETURN, AND ARE WEIGHTED BY ATTRIBUTE IMPORTANCE. ATTRIBUTE SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID A CHAIN WAS "OUTSTANDING" OR "ABOVE AVERAGE" IN THAT AREA. LIKELY TO RETURN SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID THEY "DEFINITELY" OR "PROBABLY" WILL VISIT A CHAIN AGAIN. **120-149 RESPONSES
ALL PHOTOS COURTESY OF THE RESPECTIVE RESTAURANT COMPANIES

THE GENDER GAP

Men and women have a lot in common in their restaurant preferences. They care a lot about **FOOD QUALITY, SERVICE, CLEANLINESS** and **VALUE**

But there are some differences.



Women care even more than men (who already care a lot) about **CLEANLINESS**

Women tend to favor **SAVORY** restaurants.

These are the **brands women like best**:

- The Cheesecake Factory
- P.F. Chang's China Bistro
- Chick-fil-A
- Carrabba's Italian Grill
- Red Lobster

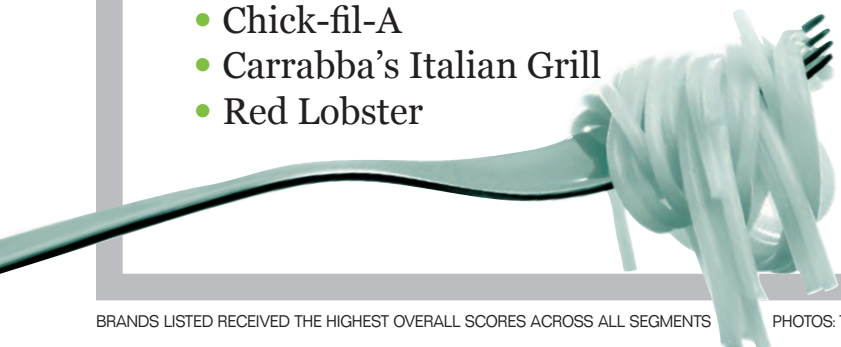


And men care more than women whether a restaurant was likely to be **RECOMMENDED**

Men have more of a **SWEET** tooth.

These are the **brands men like best**:

- Ben & Jerry's
- The Melting Pot
- Bonefish Grill
- Johnny Carino's/
Carino's Italian
- Häagen-Dazs



BRANDS LISTED RECEIVED THE HIGHEST OVERALL SCORES ACROSS ALL SEGMENTS PHOTOS: THINKSTOCK

Consumer Picks respondents rated the survey's attributes by importance and also scored their favorite brands, and results were then categorized by demographic group. Insights represent areas where importance rankings between groups differed by a statistically significant margin (+/- 5 points).

THE IMPACT OF AGE

Restaurant consumers of all ages have a lot in common on restaurant preferences.

They all care a lot about:

FOOD QUALITY, CLEANLINESS, VALUE and **SERVICE**

But brand preferences vary widely.

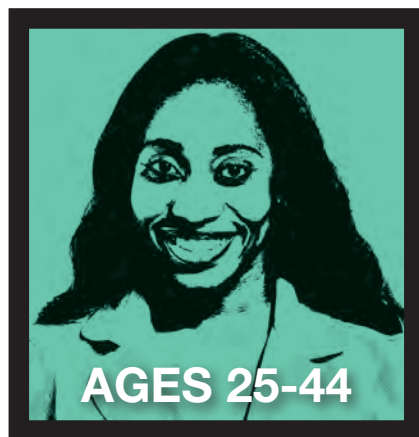
Here's a look at what restaurant brands resonate most with consumers of various age groups.



Customers in their teens and early twenties gave the highest scores to **Casual- and Family-Dining brands**.



- Red Lobster
- Cracker Barrel Old Country Store
- First Watch



Brands specializing in **sweet treats** had the highest scores among customers in their late 20s, 30s and early 40s.



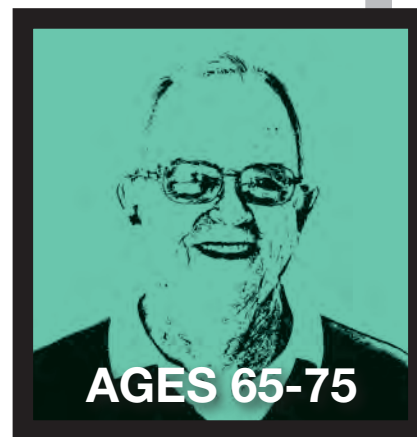
- Häagen-Dazs
- Ben & Jerry's
- Ninety Nine Restaurant & Pub



Middle-aged consumers favored **savory Casual-Dining chains**, but their top-ranked brand is also known for its signature desserts.



- The Cheesecake Factory
- Romano's Macaroni Grill
- Olive Garden



For the oldest consumers in the survey, **Limited-Service chains** took the top scores.



- Rubio's
- Corner Bakery Cafe
- Jet's Pizza

MONEY MATTERS

Consumers in all income groups care relatively equally about:
**FOOD QUALITY, CLEANLINESS, SERVICE,
 MENU VARIETY, REPUTATION, CRAVEABILITY**



But there are a few areas where their preferences diverge.

**EARN LESS THAN
\$50K A YEAR**

Consumers in the **lower income group** care more about **VALUE** than those in higher income brackets.

**EARN MORE THAN
\$100K A YEAR**

Consumers in the **higher income group** care more about whether a brand is likely to be **RECOMMENDED**

Household income had a big impact on brand preferences as well.

Here are the top-scoring Limited-Service, Casual-Dining and Family-Dining brands in each income bracket:

LESS THAN \$50,000 A YEAR

- Ben & Jerry's
- The Melting Pot
- Cracker Barrel
- Old Country Store



\$50,000-\$99,999 A YEAR

- In-N-Out Burger
- The Melting Pot
- First Watch



MORE THAN \$100,000 A YEAR

- Häagen-Dazs
- The Cheesecake Factory
- Shari's Cafe and Pies



Understanding the numbers

The Consumer Picks survey, now in its sixth year, is a joint venture of WD Partners and Nation's Restaurant News. Each year, the number of brands reviewed in the survey has grown, creating a more complete picture of restaurant brand strength and customer preferences.

This year's report includes 173 brands, one more than last year — newcomer Pollo Tropical — and 34 more chains than the first survey in 2011.

Importantly, the survey instrument itself has remained consistent allowing for multi-year comparisons, which enable users to gain insight to a brand's increasing — or decreasing — competitive position in the perspective of the consumer.

Interpreting the results

In Consumer Picks — or any other statistical survey of its type — small differences in ratings are not material and closely ranked ratings should

be considered statistically equivalent. When two or more brands appear tied in the report with similar scores, the order of listing is based on the next level of decimal point(s).

One question I am often asked is why the Overall Score is not the mathematical average of a brand's reported individual attribute scores. The answer is that the Overall Score for each brand is calculated by weighting attributes by how important respondents say they are to the dining experience. This gives us an Overall Score for each evaluation that more accurately reflects how the person rates the brand. These weighted individual overall scores are then used to obtain the brand's average Overall Score.

For more information on how the survey is conducted, see the detailed methodology below.

Drawing comparisons

As in prior years, brands are grouped into four major categories: Limited

Service, Casual Dining, Fine Dining and Family Dining. Both Limited Service and Casual Dining have a number of subcategories by menu focus. The survey's design allows a user to compare any brand to any other subsegment within the larger segment, without loss of accuracy, so long as they do not compare across the four main segments. Crossing these primary categories will introduce some error in the overall scores, as they are weighted by the importance attributes for their respective segments.

To do a multi-year comparison, do not look just at the difference in a brand's scores from year to year, as you run the risk of drawing incorrect conclusions. This approach does not take into account the time difference between the two studies as well as social factors that took place during the



Dennis Lombardi

year that may have impacted consumers' responses. A better process is to compare one brand's performance against the average score for an identical group of competitors for both this year and prior years.

Another option is to consider the difference in ranking from year to year. However, this approach will lose some of the insights as to the magnitude of year-to-changes.

A copy of survey results can be downloaded at NRN.com, and additional materials are also available from WD Partners.

WD Partners and NRN hope you find Consumer Picks 2016 to be a useful and valuable tool. ■

Dennis Lombardi is a consultant to WD Partners on the Consumer Picks project and president of Insight Dynamics LLC.

METHODOLOGY

The Consumer Picks survey was developed by WD Partners' Insights group and is designed to provide relative benchmarks on major attribute ratings across restaurant brands.

The survey was conducted online in January, and respondents were given a list of restaurant chains organized into groups depending on the chain's service model and the respondent's location. Respondents were asked to identify which restaurants they had patronized in the last six months, or since July 1, 2015, and how many times they visited during that time period. Respondents were then asked to rate their experiences for up to eight of the restaurants they had patronized in that six-month period. The six-month time frame is designed to increase the likelihood of reasonable recall by respondents and ensure that respondents would represent a broad range of consumers.

Responses were screened for inconsistent answers; "straight lining," or selecting the same response repeatedly; and excessive haste in completing the questionnaire. This scrubbing process reduced the number of acceptable

responses to 4,805 from a total of 5,171. The 173 restaurant chains in this year's Consumer Picks received a total of 37,339 individual ratings from those respondents.

Restaurants that received fewer than 100 ratings are not included in this report. This year all the included restaurant brands had 120 or more ratings. The restaurant brands with 120 to 149 responses are noted in rankings with a "***". All other brands had 150 or more responses. Seventy-eight restaurant brands had 200 or more respondents.

The questionnaire was designed and tested by WD Partners. To administer it, the firm worked with Instantly Inc., which supplied panel respondents, and SurveyGizmo, which provided the survey administration software.

The survey addresses ten attributes: Atmosphere, Cleanliness, Craveability, Food Quality, Likelihood to Recommend, Likelihood to Return, Menu Variety, Reputation, Service and Value.

Results are shown as the percentage of top-two-box ratings received, based on a standard five-box scale. For most attributes, scores are the percentage of respondents who said a brand was "outstanding" or "above average" in that area. For Likely to Return and

Likely to Recommend, scores are the percentage respondents who "definitely" or "probably" will recommend the brand or visit again. Brands' Overall Scores are a weighted average of attribute scores, weighted by the importance of each attribute to customers in their respective segments.

Restaurant chains with similar scores should be considered statistically equivalent.

Demographic information on the respondents was obtained to align the survey results with the U.S. population based on reports from the U.S. Census Bureau's 2015 Current Population Survey.

Detailed data is available for purchase, and additional survey results such as percentage of top-box scores and custom data analysis are available by contacting Mary Rea at mary.rea@wdpartners.com.

WD Partners is a Dublin, Ohio-based firm specializing in the customer experience that helps global food and retail brands innovate through strategy and design. Research conducted by WD Partners' Insights group is part of the company's integrated approach to enhancing the performance of foodservice brands.