

cleanliness winning choices atmosphere
fresh creative food fresh service appealing menu
quality craveability menu reputation variety
creative fresh attentive food delicious
service cleanliness quality friendly
creative atmosphere attentive reputation
unique welcoming hospitality fresh
variety



CONSUMER PICKS

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price
service appealing innovative welcoming
craveability food appealing choices food
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favorite reputation attentive hospitality price
delicious unique service top well designed atmosphere
reputation great price value appealing

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CONSUMER PICKS

See which brands win diners' devotions and why in the fourth annual survey

BY ROBIN LEE ALLEN

Restaurants have questioned and studied for years the impacts the Millennial age group will have on their businesses — and the answers have arrived.

In the fourth annual Consumer Picks survey from Nation's Restaurant News and WD Partners, the rising importance of peer or social reviews, best tied to survey attributes Likely to Recommend and Likely to Return, showcase the dominant nature of sharing among Millennials.

With the bulk of the estimated 90 million people born between 1980 and 2000 now in their 20s and 30s, Millennials are dining out in droves, loudly voicing their

desires and rewarding brands that listen to their preferences. Three out of the four top-performing brands in their respective Consumer Picks restaurant industry segments — In-N-Out Burger in Limited Service, The Original Pancake House in Family Dining and Ruth's Chris Steak House in Fine Dining — were buoyed by high scores in many attributes, but most importantly in Likely to Recommend. Many of the highest-ranking brands within the report's subsegments, like Limited-Service Beverage/Snack or Casual-Dining Italian/Pizza, also scored high in Likely to Recommend.

"[The results are] tied to the increasing consumer power of

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IN-N-OUT BURGER'S
DOUBLE-DOUBLE CHEESEBURGER



THE CHEESECAKE FACTORY'S
CAJUN JAMBALAYA PASTA



RUTH'S CHRIS STEAK HOUSE'S
HERO RIBEYE



THE ORIGINAL PANCAKE HOUSE'S
APPLE PANCAKES



Taco Bell's breakfast rollout, featuring such innovative offerings as the Waffle Taco, is set to occur March 27.

Fight for breakfast escalates

BY LISA JENNINGS

Armed with a Waffle Taco and a few years of Millennial-driven momentum, Taco Bell is taking a bold step into the morning daypart with its national rollout of breakfast March 27.

Many see the move as a direct

attack on the beloved Egg McMuffin and McDonald's dominance at breakfast. But Taco Bell joins a growing crowd of morning quick-service competitors, all hoping to tempt consumers out of bed with innovative yet affordable offerings served with convenience, speed and a decent cup of coffee.

Burger players like Burger King, Jack in the Box and Hardee's have long fought to chip away at McDonald's morning market share. Subway has trained consumers to buy both a morning meal and a sandwich to eat later for lunch. Chick-fil-A is spreading love for

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Learn how diners measure your brand in the fourth annual survey from NRN and WD Partners

CONTINUED FROM PAGE 3

the Millennials, where two-thirds of Millennials will probably ask friends for their opinions before going to a restaurant,” said Dennis Lombardi, executive vice president, foodservice strategies at WD Partners. The Dublin, Ohio-based consulting firm oversees the Consumer Picks survey.

Combine this Millennial need to seek out opinions with the dominance of social media — research firm eMarketer estimates that two-thirds of U.S. Internet users, or 163.5 million people, were part of social media networks by the end of 2013 — and that’s a lot of sharing. Restaurants need to be sure they are listening.

As Millennials make more and more restaurant visits and share their opinions on social media, restaurant brand scores for Likely to Recommend and Likely to Return within the Consumer Picks survey will take on even more importance, Lombardi said.

“Likely to Recommend and Likely to Return are the best ways to tell us their impressions,” he said. “Those scores are an aggregation of emotions and feelings.”

The 2014 Consumer Picks report includes survey results for 162 restaurant brands representing four segments: Limited Service, Casual Dining, Family Dining and Fine Dining. The survey was fielded in January, and the results reflect more than 44,000 consumer attitudes on 10 attributes: Food Quality, Value, Cleanliness, Service, Menu Variety, Reputation, Atmosphere, Craveability, Likely to Recommend and Likely to Return.

Beyond the growing importance of recommendations, the survey also revealed that Millennials placed more value than the older baby boomer generation and seniors on Craveability, no matter the restaurant segment.

Those preferences led to a notable upset within the Family-Dining segment, where The Original Pancake House this year dethroned longtime top-scorer Cracker Barrel Old Country Store. Original Pancake House garnered the highest scores for seven of the 10 attributes in that segment, pushing it from its



Consumer Picks measures customers’ opinions of restaurant brands using 10 attributes, offering insights into where they’re excelling and where there’s room for improvement.

third-place position in 2013 to No. 1 in 2014.

One of the attributes in which it excelled was Craveability, where Original Pancake House was nearly 16 percentage points higher than runner-up Cracker Barrel. Original Pancake House also won the highest score for Likely to Recommend, coming in 5.8 percentage points higher than runner-up Cracker Barrel.

Jon Liss, general counsel and corporate chef for Portland, Ore.-based Original Pancake House, noted that social media had helped to raise the profile of the 121-unit chain, which operates as a network of franchises.

“There’s a viral quorum, if you want to put it that way,” Liss said. “In the past two to three years we’ve broken through to get a national reputation. There are more franchisees involving themselves in social media, and that might have some impact.”

Although Cracker Barrel edged ahead of Original Pancake House in its score for Atmosphere — another attribute Millennials value more within the Family-Dining segment than baby boomers and seniors do — and Menu Variety, it was not able to maintain its hold on the No. 1 spot for the fourth year in a row.

While Millennials are throwing their weight around and the increased importance of the Likely to Recommend attribute is shifting

results, the importance of the Food Quality, Cleanliness, Value and Service attributes was not diminished. Success in those attributes remained crucial to all consumers across all of the segments. The next most important attribute — one that differs from segment to segment and we call the ‘X factor’ — includes Craveability for Limited Service, Atmosphere for Casual Dining and Menu Variety for Family Dining.

Brands that win over guests with the X factor tend to win overall consumer preference. For more insights into brand strengths and the demographic trends driving dining-out choices, turn the page for the full special report, including the full methodology and breakdown from WD Partners on page 50. ■

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BY THE NUMBERS:

162 restaurant chains ranked

9 new brands represented

44,458 ratings collected

4 industry segments analyzed

10 attributes addressed



For more detailed or customized data, please contact Dennis.Lombardi@WDPartners.com.

The Consumer Picks survey was developed by WD Partners’ Insights group, a division of WD Partners. For

The four chains featured here placed No. 1 in their respective segments, with consumers reporting their love for characteristics ranging from the brands' food quality to a reputation for excellence. The factors driving their success with guests are detailed below.

LIMITED-SERVICE WINNER

In-N-Out Burger

Irvine, Calif.; 292 units

SURVEY STRENGTHS:

Food Quality: The burgers are made from never-frozen, 100-percent beef patties ground in-house and served on house-baked buns. Potatoes are cut and fried in-house for fries, and milk shakes are made from real ice cream. Order your burger "animal style," and your patty will be grilled with mustard, and topped with grilled onions and extra sauce.

Value: A Double-Double cheeseburger with fries is roughly \$5 near Los Angeles. Given the quality, In-N-Out's prices are hard to beat.

Service: The starting wage for employees is higher than the minimum wages in its markets, and the chain is known for low turnover.

Reputation: People have loved the concept since 1948 in California. Slow growth has brought outlets to Nevada, Arizona, Utah and Texas, where it has maintained its popularity.

Likely to Recommend/Return: Fans are unwavering in their devotion. In California, in particular, all other burger brands are compared to In-N-Out, and visitors are advised to visit the chain at least once.



IN-N-OUT BURGER

IN-N-OUT BURGER'S DOUBLE-DOUBLE CHEESEBURGER WITH FRENCH FRIES



THE CHEESECAKE FACTORY'S MISO SALMON

CASUAL-DINING WINNER

The Cheesecake Factory

Calabasas Hills, Calif.; 181 units

SURVEY STRENGTHS:

Menu Variety: The Cheesecake Factory's voluminous menu features more than 200 items and spans all dayparts. Menu items are made from scratch daily, except for desserts, which are manufactured at separate bakeries. The menu boasts inventive combinations that are hard to recreate at home, like Avocado Eggrolls and Miso Salmon, and 36 varieties of cheesecake, including indulgent items like the Toasted Marshmallow S'mores Galore cheesecake.

Reputation: The chain's unit and sales growth has come with little to no broadcast advertising since the first restaurant opened in 1978, though the brand drives word-of-mouth buzz through social media and local-store marketing.



THE CHEESECAKE FACTORY'S TOASTED MARSHMALLOW S'MORES GALORE

FAMILY-DINING WINNER

The Original Pancake House

Portland, Ore.; 121 units

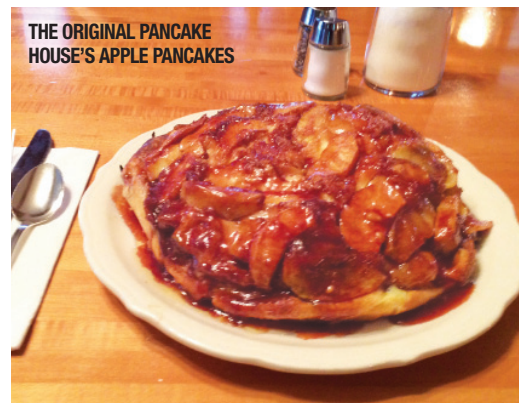
SURVEY STRENGTHS:

Food Quality: The brand seeks franchisees that already love the restaurant's food and focuses on consistency.

Reputation: This chain has recently made the leap from a cult favorite to one with national buzz.

Craveability: Specialties such as Apple Pancakes and a focus on top-quality ingredients garner the chain high ratings in this attribute.

Likely to Recommend/Return: Original Pancake House leaves local marketing in the hands of franchisees that understand what their customers want, with the goal of turning them into regulars.



THE ORIGINAL PANCAKE HOUSE'S APPLE PANCAKES

FINE-DINING WINNER

Ruth's Chris Steak House

Heathrow, Fla.; 118 units



RUTH'S CHRIS STEAK HOUSE'S HERO FILET WITH ASPARAGUS

SURVEY STRENGTHS:

Value: The chain's Sizzle, Swizzle & Swirl Happy Hour program offers premium items at casual-dining prices.

Cleanliness: Training programs impart a corporate culture that encourages attention to detail.

Menu Variety: Apart from the steak and traditional steakhouse sides, Ruth's also offers seasonal seafood, vegetarian options, and creative sides and appetizers.

Reputation: Years of consistency and maintenance of its heritage keep Ruth's in good stead with customers looking for a special-occasion restaurant.

Craveability: With a focus on sizzling steaks topped with butter, the chain doesn't have a problem getting mouths to water.

Pleasing their palates

BY LISA JENNINGS

Proving a consistent standout, In-N-Out Burger once again took the top spot in the Consumer Picks ranking for Limited-Service chains, receiving the highest scores in six of 10 categories in 2014.

It was somewhat of a repeat performance for the Irvine, Calif.-based chain, which also topped last year's list. In both 2013 and 2014, In-N-Out scored the highest in such attributes as Food Quality, Service, Reputation and Likelihood to Recommend. This year, In-N-Out picked up the highest scores for Value and Likelihood to Return, as well.

With 292 units across California, Utah, Arizona, Nevada and Texas, In-N-Out's simple menu of burgers, milk shakes and French fries has changed very little over the past six decades.



Carl Van Fleet, In-N-Out's spokesman, said the chain remains committed to maintaining an intense focus on quality and customer service.

"We really do continue to adhere to the values that our founders, Harry and Esther Snyder, established for us in 1948," he said. "Quality and customer service were of the utmost importance then, and they remain so today."

This year, however, other Limited-Service brands beat In-N-Out on four attributes that are key to consumers.

Caribou Coffee took the lead spots for Cleanliness and Atmosphere, though fewer than 150 consumers ranked the chain. That could be because some stores have been converted to other concepts in some markets.

The Minneapolis-based coffeehouse brand was acquired by German holding company Joh. A. Benckiser in 2012, and the company is converting some Caribou locations to sister brand Peet's Coffee & Tea. However, Caribou is beefing up core markets with new food offerings to boost traffic.

Golden Corral topped the Limited-Service list for Menu Variety, with its vast buffet lines of salads, soups, desserts and entrées ranging from steaks to fried chicken. Still, the buffet chain dropped in the segment's overall rankings to No. 64, compared with No. 38 last year.

Krispy Kreme Doughnuts scored the highest for Craveability,



an important attribute in the Limited-Service segment, which helped to boost the Winston-Salem, N.C.-based doughnut chain to No. 4 in the segment overall.

Within all segments, consumers said the most important attributes for any brand are Food Quality, Cleanliness, Value and Service. For the Limited-Service segment, however, the next most important factor — or X factor — is Craveability.

With an inherently addictive menu of doughnuts and coffees, Krispy Kreme has been keeping its lineup fresh with limited-time offers, such as the recent coffee-flavored Lotta Latte promotion, which included new Mocha Kreme and Caramel Coffee Kreme doughnuts.

In the overall ranking for Limited Service, there was an upset this year for the No. 2 slot.

The ice cream chain Häagen-Dazs, which placed No. 13 last year, climbed up the chart, with the second highest Overall Score. Meanwhile, last year's No. 2, Cold Stone Creamery, fell out of the top 10.

Minneapolis-based Häagen-Dazs, which has 215 U.S. units and another 600 international ones, has been working on improving customer service and fine-tuning its signage and in-

store promotional material to align more closely with its grocery products. A new gelato platform was also launched last April.

Chick-fil-A also climbed the ranks this year to the No. 3 slot, up from No. 7 last year. The growing consumer love comes as the 1,800-unit Atlanta-based chain has been quietly removing artificial dyes, high-fructose corn syrup and some preservatives from its menu in an ongoing effort to improve food quality. More recently, Chick-fil-A announced plans to switch to using only chickens raised without antibiotics.

St. Louis-based Panera Bread rounded out the top five this year, climbing up from No. 14 last year.

A high scorer for Food Quality, in particular, Panera has been working on improving throughput and order accuracy at its 1,770 restaurants. ■

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The X factor

Beyond Food Quality, Cleanliness, Value and Service — which are universally important across segments — Craveability is the attribute that consumers said can most set a Limited-Service chain apart.



Food Quality:
87.7%



Cleanliness:
83.4%



Value:
71.4%



Service:
62.1%



CRAVEABILITY:
51.8%



Menu Variety:
47.0%



Reputation:
43.8%



Atmosphere:
40.5%



Likely to Recommend:
23.6%

SCORES ARE PERCENTAGE OF RESPONDENTS WHO SAID EACH ATTRIBUTE WAS "ESSENTIAL" OR "VERY IMPORTANT."

Chains shown received the highest score in the attribute(s) listed



RANK	CHAIN	SCORE*							
1	In-N-Out Burger	75.2	38	Steak 'n Shake	57.6	72	ciCi's Pizza	50.3	
2	Häagen-Dazs	73.1	39	Bojangles' Famous	57.5	73	Blimpie	50.3	
3	Chick-fil-A	69.3		Chicken 'n Biscuits		74	Pizza Hut	49.5	
4	Krispy Kreme Doughnuts	68.1	40	Smashburger	57.3	75	Captain D's Seafood	49.4	
5	Panera Bread	67.1	41	Zaxby's	57.2	76	Quiznos	48.1	
6	Marble Slab Creamery	67.1	42	Five Guys Burgers and Fries	57.1	77	Panda Express	48.0	
7	Corner Bakery Cafe	67.0	43	Whataburger	56.9	78	Tim Hortons	47.8	
8	Bruster's Real Ice Cream**	66.5	44	Starbucks Coffee	56.7	79	El Pollo Loco	47.6	
9	Ben & Jerry's	66.2	45	Jimmy John's Gourmet Sandwiches	56.4	80	Dunkin' Donuts	47.4	
10	McAlister's Deli	65.8	46	Braum's Ice Cream and	56.1	81	Domino's Pizza	47.2	
11	Cold Stone Creamery	65.0		Dairy Stores**		82	Wendy's	46.6	
12	Papa Murphy's Take 'N' Bake Pizza	64.7	47	Moe's Southwest Grill	56.0	83	Auntie Anne's Pretzels	46.4	
13	Tropical Smoothie Café**	64.0	48	Carvel	55.9	84	Church's Chicken	45.9	
14	Rita's	63.8	49	Baskin-Robbins	55.7	85	Long John Silver's	45.7	
15	Caribou Coffee**	63.7	50	Subway	55.4	86	A&W Restaurants	45.2	
16	Noodles & Company	62.8	51	Boston Market	55.2	87	Sonic, America's Drive-In	44.6	
17	Potbelly Sandwich Works	62.4	52	Ponderosa Steakhouse/	55.2	88	Taco Bell	44.5	
18	Culver's	62.2		Bonanza Steakhouse**		89	Checkers	44.4	
19	Firehouse Subs	61.9	53	Au Bon Pain	54.8	90	White Castle	43.5	
20	Pei Wei Asian Diner	61.6	54	Great American Cookies**	54.8	91	Dairy Queen	43.3	
21	Chipotle Mexican Grill	61.6	55	Bruegger's Bagels	54.7	92	Orange Julius	43.2	
22	Jason's Deli	61.0	56	Round Table Pizza	54.6	93	Jack in the Box	43.2	
23	Smoothie King	60.7	57	Fazoli's**	54.2	94	KFC	42.9	
24	Jamba Juice	60.6	58	Einstein Bros Bagels	54.1	95	Sbarro	42.7	
25	Rubio's Fresh Mexican Grill**	60.5	59	Sizzler	53.8	96	Del Taco	42.5	
26	Mrs. Fields Cookies	60.4	60	Old Country Buffet	53.7	97	Krystal	42.4	
27	Jet's Pizza**	60.4	61	Baja Fresh Mexican Grill	53.1	98	Little Caesars Pizza	42.3	
28	Charley's Grilled Subs**	60.2	62	Cinnabon	53.0	99	Arby's	42.1	
29	Souplantation/Sweet Tomatoes	60.1	63	Popeyes Louisiana Kitchen	52.7	100	Wienerschnitzel	42.0	
30	Wingstop	59.9	64	Golden Corral	52.6	101	Taco John's**	41.7	
31	Jersey Mike's Subs	59.9	65	Rally's Hamburgers**	51.8	102	Hardee's	40.5	
32	Schlottsky's Deli	59.0	66	Ryan's	51.6	103	Burger King	38.0	
33	Sarku Japan**	58.9	67	Papa John's Pizza	51.5	104	McDonald's	37.4	
34	Qdoba Mexican Grill	58.2	68	Carl's Jr.	51.0	105	Chuck E. Cheese's	34.8	
35	Godfather's Pizza**	58.1	69	HomeTown Buffet	50.9	*AVERAGE OF ATTRIBUTE SCORES, WEIGHTED BY ATTRIBUTE IMPORTANCE. LIKELY TO RETURN DATA ARE NOT WEIGHTED AND ARE THEREFORE NOT INCLUDED IN CHAINS' OVERALL SCORES.			
36	Togo's**	58.1	70	Hungry Howie's Pizza**	50.9	**100-149 RESPONSES			
37	Fuddruckers	57.6	71	Dickey's Barbecue Pit	50.4				

**100-149 RESPONSES

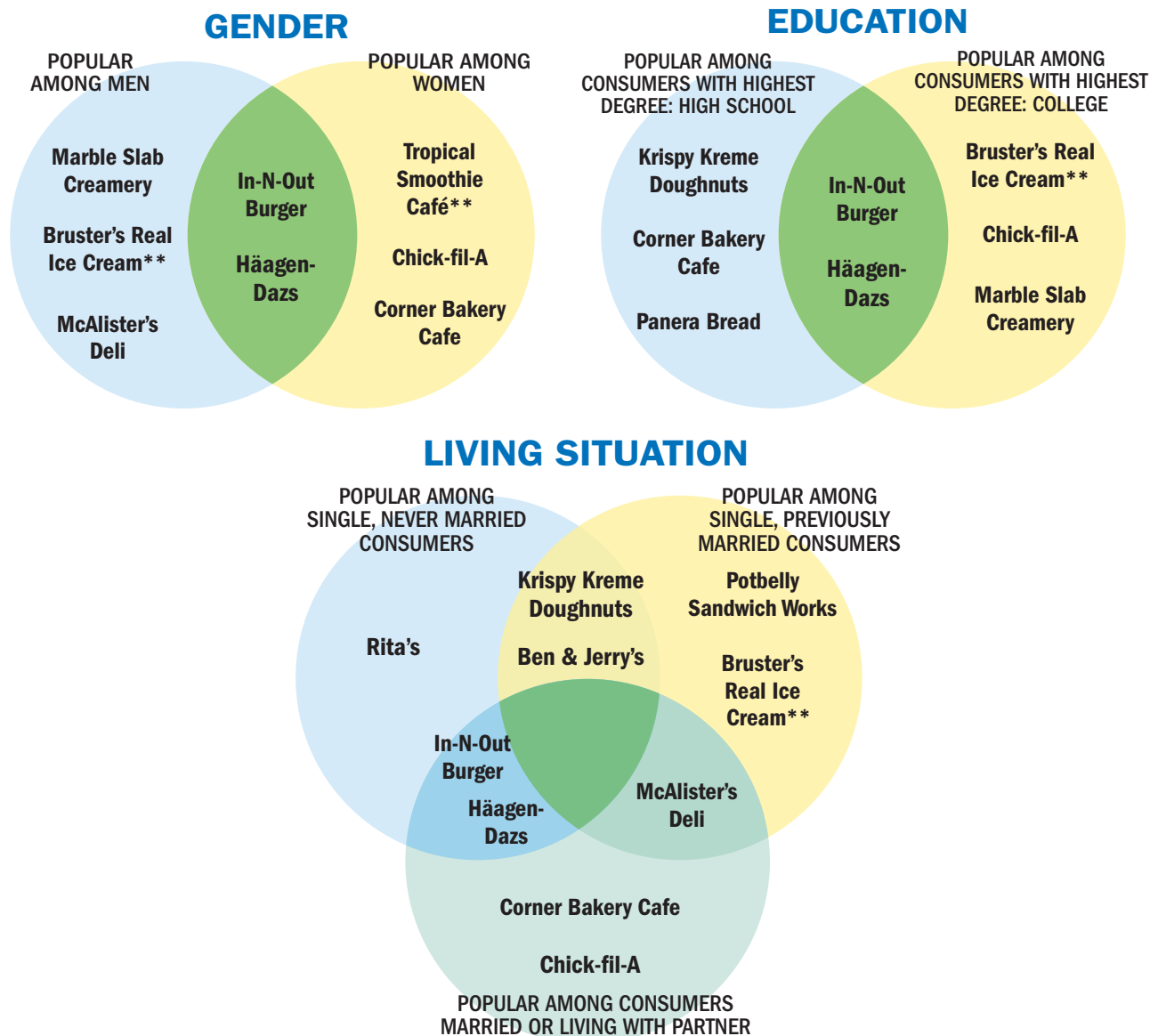
Whether or not a customer comes back is the true test of any brand. Below are the five Limited-Service chains with the most consumers saying they “definitely” or “probably” would return.



DEMOGRAPHIC TRENDS After respondents completed this year's Consumer Picks survey, their answers were sorted using commonly accepted demographic groups based on a respondent's gender, age, income and living situation. The result is a look at what brands scored well with the various groups as well as insights into the factors driving their dining decisions.

People's choice

Charts represent the five chains with the highest Overall Scores among each demographic



Demographic differences

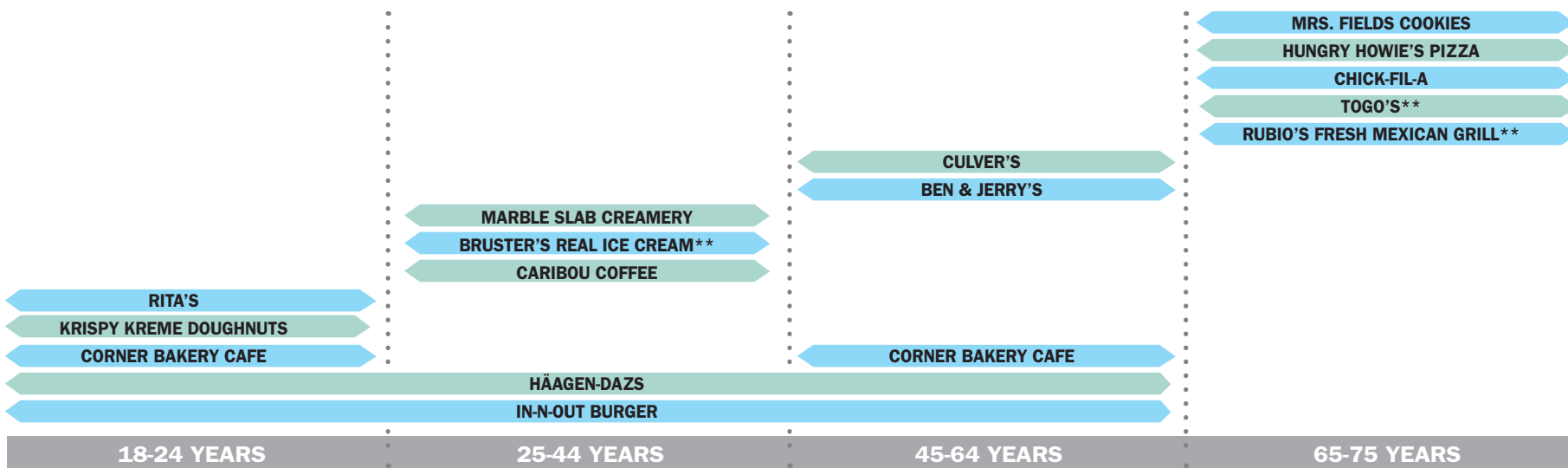
Consumer Picks respondents ranked the importance of the survey's dining-out attributes. Results were categorized by demographic groupings, and insights here represent areas where importance rankings differed by a statistically significant margin, or at least five percentage points.

- **Boomers and seniors** placed a higher priority on **Cleanliness** and **Service** than did Millennials.
- **Millennial** diners placed a greater importance than older consumers on **Craveability** and the **Likely to Recommend** metric.
- **Married/partnered consumers** said **Service** and **Menu Variety** were more important than their single counterparts did.
- Consumers with annual household incomes of **less than \$50,000** paid more attention to **Value** than their peers with annual household incomes of \$100,000 or more.
- Those **lower-income consumers** also placed higher emphasis on **Craveability** and **Menu Variety** than did those with higher income levels.



Generation gaps and overlaps

Top five Limited-Service brands among each age group



**100-149 RESPONSES

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

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
NOODLES & COMPANY	62.8%	16	73.0%	46.2%	69.7%	62.1%	58.4%	66.0%	55.7%	54.4%	70.8%	62.8%
PEI WEI ASIAN DINER	61.6	20	71.6	49.4	67.7	58.7	59.1	61.0	50.3	62.4	68.8	53.9
SARKU JAPAN**	58.9	33	66.3	55.7	57.7	56.7	50.8	52.4	51.7	62.7	70.4	62.0
PANDA EXPRESS	48.0	77	49.9	45.4	51.4	46.1	48.5	47.2	35.9	47.2	53.9	54.3

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
PANERA BREAD	67.1%	5	83.2%	42.7%	74.4%	64.6%	65.3%	74.4%	63.1%	53.5%	75.1%	72.6%
CORNER BAKERY CAFE	67.0	7	77.3	54.3	74.9	70.6	64.6	62.6	59.1	61.0	71.5	70.9
AU BON PAIN	54.8	53	67.2	41.3	62.7	50.5	54.4	60.5	44.2	44.5	60.4	58.1
BRUEGGER'S BAGELS	54.7	55	70.1	41.3	61.0	56.0	42.4	59.1	46.8	46.0	60.7	59.0
EINSTEIN BROS BAGELS	54.1	58	62.2	43.8	64.3	55.1	46.2	57.7	44.0	52.6	55.5	55.3

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
KRISPY KREME DOUGHNUTS	68.1%	4	76.4%	56.9%	67.5%	62.1%	52.6%	76.5%	57.0%	81.5%	81.3%	76.1%
TROPICAL SMOOTHIE CAFE**	64.0	13	71.5	46.4	70.6	63.9	61.0	68.7	59.0	60.8	70.4	72.4
CARIBOU COFFEE**	63.7	15	60.6	42.9	77.8	74.3	44.1	71.1	71.2	57.3	71.2	66.0
SMOOTHIE KING	60.7	23	71.9	42.8	66.9	63.9	62.8	59.3	52.8	55.6	67.8	56.2
JAMBA JUICE	60.6	24	73.6	40.3	67.1	58.7	53.4	68.7	53.1	61.1	64.4	60.3
MRS. FIELDS COOKIES	60.4	26	76.6	44.5	61.0	55.2	40.9	66.9	50.1	71.5	69.3	62.8
STARBUCKS COFFEE	56.7	44	59.4	20.4	67.5	68.6	43.1	76.7	60.4	53.9	60.8	71.6
GREAT AMERICAN COOKIES**	54.8	54	63.0	28.8	50.4	55.5	57.9	64.7	43.0	70.3	66.1	60.4
CINNABON	53.0	62	69.4	36.7	51.5	48.5	29.8	66.0	39.2	70.9	63.8	59.8
TIM HORTONS	47.8	78	48.7	44.4	56.9	44.2	34.9	59.1	39.5	41.3	55.1	59.0
DUNKIN' DONUTS	47.4	80	47.6	46.2	44.8	47.8	37.8	55.6	33.5	53.8	57.8	65.2
AUNTIE ANNE'S PRETZELS	46.4	83	59.4	38.0	42.3	39.1	27.3	52.2	32.0	62.9	61.7	54.4
ORANGE JULIUS	43.2	92	48.0	35.2	43.1	44.9	36.3	44.8	31.7	48.2	54.6	48.3

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
SOUPLANTATION/SWEET TOMATOES	60.1%	29	71.6%	61.3%	61.9%	54.0%	57.6%	57.4%	42.9%	55.8%	71.4%	64.5%
PONDEROSA STEAKHOUSE/ BONANZA STEAKHOUSE**	55.2	52	53.0	55.0	59.9	53.6	56.9	50.2	46.3	57.3	60.4	55.4
SIZZLER	53.8	59	51.0	55.3	55.1	53.3	59.2	47.5	43.5	49.1	65.8	56.9
OLD COUNTRY BUFFET	53.7	60	46.7	66.4	47.4	45.8	72.4	54.0	43.7	43.8	60.5	51.8
GOLDEN CORRAL	52.6	64	51.5	57.0	43.7	46.4	74.3	50.0	38.3	49.3	63.4	57.7
RYAN'S	51.6	66	51.8	56.5	46.3	51.4	61.3	45.0	43.0	46.2	60.3	54.3
HOMETOWN BUFFET	50.9	69	40.8	63.8	39.7	40.6	70.6	50.3	41.6	48.6	60.7	57.4

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CHICK-FIL-A	69.3%	3	80.9%	54.2%	75.0%	78.8%	46.4%	77.6%	60.1%	68.2%	78.2%	73.5%
WINGSTOP	59.9	30	69.2	47.4	57.5	51.2	50.2	66.3	55.8	70.3	70.9	62.0
BOJANGLES' FAMOUS CHICKEN 'N BISCUITS	57.5	39	65.0	51.6	54.2	53.6	45.8	65.0	40.9	63.8	72.1	72.0
ZAXBY'S	57.2	41	72.8	39.9	63.1	55.0	41.1	61.4	46.7	57.7	68.7	71.2
BOSTON MARKET	55.2	51	62.2	51.2	64.1	52.6	48.1	54.3	43.0	52.8	59.6	58.9
POPEYES LOUISIANA KITCHEN	52.7	63	64.4	53.5	42.7	42.6	46.2	53.6	39.0	62.0	66.3	66.8
EL POLLO LOCO	47.6	79	59.3	52.7	45.4	35.8	42.9	43.3	33.9	49.9	60.9	59.2
CHURCH'S CHICKEN	45.9	84	51.3	56.2	35.3	40.3	34.9	45.0	33.6	53.5	60.5	58.6
KFC	42.9	94	50.2	39.0	36.7	39.3	35.8	48.3	29.6	51.8	51.1	52.5

Sarku JAPAN®

The more than 250-unit food court concept **Sarku Japan**, a new-comer to the survey, snagged the top scores for Value and Craveability, as well as strong scores from consumers who said they were Likely to Recommend the brand and Likely to Return. **Noodles & Company**, however, won the sub-category with the highest scores in seven attributes, knocking last year's leader **Pei Wei Asian Diner** to the No. 2 slot for Overall Score.



Panera Bread just barely maintained its hold on the No. 1 spot within the Bakery/Cafe subsegment, as **Corner Bakery Café** nipped at its heels. Both brands won Overall Scores a solid 12 percentage points above the rest of their subsegment peers, and between them excelled in every attribute.



Krispy Kreme Doughnuts took the top score within the Beverage/Snack subset again this year, scoring highest on Value, Craveability, Likelihood to Recommend and Likelihood to Return. **Mrs. Fields Cookies** scored highest for Food Quality, and **Caribou Coffee** was a strong winner on Cleanliness, Service and Atmosphere. Two new brands joined the subset: **Tropical Smoothie Café** and **Great American Cookies**.



Chick-fil-A took the lead on seven of 10 attributes with scores that were significantly higher than others in the subset. For the attribute of Service, Chick-fil-A's score was more than 20 percentage points higher than the closest-ranked brand of **Zaxby's**. Consumers ranked **Church's Chicken** the highest for Value, and **Wingstop** took the honors for both Menu Variety and Craveability.

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

Frozen Treats

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
HÅGEN-DAZS	73.1%	2	81.9%	58.0%	75.2%	68.2%	71.1%	80.0%	68.2%	75.2%	78.3%	72.3%
MARBLE SLAB CREAMERY	67.1	6	81.8	37.9	67.4	65.0	64.7	70.4	64.3	73.4	74.9	72.2
BRUSTER'S REAL ICE CREAM**	66.5	8	81.9	48.9	63.5	64.6	58.2	74.0	48.2	70.7	82.6	73.2
BEN & JERRY'S	66.2	9	75.7	38.4	66.2	66.0	65.1	76.6	53.8	72.4	75.6	64.4
COLD STONE CREAMERY	65.0	11	82.4	29.8	59.7	65.4	69.5	74.7	54.2	75.2	74.1	59.0
RITA'S	63.8	14	65.9	64.9	61.1	69.6	52.3	69.5	43.8	66.3	79.8	58.7
BRAUM'S ICE CREAM AND DAIRY STORES**	56.1	46	67.9	50.3	56.5	53.6	52.8	62.1	40.7	48.3	68.0	69.3
CARVEL	55.9	48	66.3	47.1	54.4	51.6	52.7	56.3	44.3	60.7	65.6	59.0
BASKIN-ROBBINS	55.7	49	64.0	37.7	56.3	54.6	52.0	61.9	42.9	63.8	64.5	62.4
DAIRY QUEEN	43.3	91	47.6	39.2	40.6	41.5	37.2	41.8	28.9	53.6	55.6	53.0



Winning in eight attributes, **In-N-Out Burger** stood head and shoulders above the rest with an Overall Score that was 13 points above the subset's No. 2 finisher, **Culver's**. Still, Culver's, with its deep menu of ButterBurgers, sandwiches, fried chicken, salads and ice cream, took the lead for Menu Variety, and **Fuddruckers** was given the highest score for Atmosphere. New to the survey this year was **Smashburger**, which snagged a No. 5 position among the burger players.

Hamburger

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
IN-N-OUT BURGER	75.2%	1	86.1%	77.7%	75.5%	83.8%	32.0%	89.8%	58.0%	80.5%	86.5%	83.3%
CULVER'S	62.2	18	71.8	43.8	68.5	69.1	61.5	66.8	43.6	56.4	67.9	69.4
FUDDRUCKERS	57.6	37	70.5	38.9	56.1	55.3	45.5	65.8	59.7	56.6	67.1	58.0
STEAK 'N SHAKE	57.6	38	59.6	59.1	53.5	56.4	58.6	53.8	48.6	58.1	64.0	61.0
SMASHBURGER	57.3	40	69.8	39.2	60.6	62.6	43.0	62.7	47.8	60.1	62.6	58.6
FIVE GUYS BURGERS AND FRIES	57.1	42	79.4	45.7	51.0	56.4	29.0	69.8	44.0	62.9	66.5	57.9
WHATABURGER	56.9	43	68.1	51.3	49.6	48.1	52.3	65.3	39.9	63.8	69.3	70.5
RALLY'S HAMBURGERS**	51.8	65	49.7	69.7	46.2	52.7	49.4	41.2	28.9	61.1	63.2	65.7
CARL'S JR.	51.0	68	55.9	41.5	45.9	43.1	60.5	56.7	39.5	54.1	63.3	66.8
WENDY'S	46.6	82	52.8	52.1	40.9	39.6	48.9	45.5	32.0	47.6	55.0	61.7
A&W RESTAURANTS	45.2	86	48.1	40.3	44.4	44.5	42.8	48.3	33.6	51.0	54.9	50.4
SONIC, AMERICA'S DRIVE-IN	44.6	87	41.2	39.6	36.1	52.1	55.7	44.5	36.9	44.5	53.9	51.3
CHECKERS	44.4	89	43.5	58.5	37.6	39.0	46.1	40.6	30.6	47.5	52.1	60.3
WHITE CASTLE	43.5	90	38.2	57.6	38.8	34.7	31.9	37.4	27.0	62.5	55.6	60.0
JACK IN THE BOX	43.2	93	40.7	55.3	36.2	39.5	51.1	38.4	23.9	45.6	54.8	60.7
KRYSTAL	42.4	97	38.6	54.1	35.4	38.6	34.5	40.6	26.8	52.9	54.2	58.5
HARDEE'S	40.5	102	50.2	36.0	36.7	37.7	41.5	36.5	27.0	40.4	50.7	56.9
BURGER KING	38.0	103	40.7	46.3	32.7	35.8	34.2	36.7	25.9	37.5	45.2	54.8
MCDONALD'S	37.4	104	27.4	53.1	33.4	30.2	38.9	42.4	23.3	40.7	42.8	61.0



Newcomer **Rubio's Fresh Mexican Grill**, the fish taco specialist based in San Diego with 193 restaurants in western states, made quite a mark on the subcategory, winning top scores for six attributes, including the Limited-Service X Factor of Craveability. **Chipotle Mexican Grill** took the top spot for Overall Score, but the difference was statistically insignificant, with Rubio's close behind. Still, consumers love **Taco Bell** for Value and rated **Moe's Southwest Grill** most highly for its Atmosphere.

Mexican

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CHIPOTLE MEXICAN GRILL	61.6%	21	76.9%	53.5%	62.9%	58.9%	41.6%	71.7%	49.2%	60.6%	68.9%	67.4%
RUBIO'S FRESH MEXICAN GRILL**	60.5	25	64.1	38.8	68.0	63.0	55.5	62.3	50.3	64.4	73.2	70.9
QDOBA MEXICAN GRILL	58.2	34	68.0	52.6	61.1	59.8	44.7	58.8	47.9	57.4	64.7	63.5
MOE'S SOUTHWEST GRILL	56.0	47	61.5	52.5	53.3	57.1	43.5	59.2	51.2	57.8	62.5	57.1
BAJA FRESH MEXICAN GRILL	53.1	61	65.5	48.1	58.6	51.7	44.0	51.4	39.8	51.9	58.6	51.5
TACO BELL	44.5	88	37.8	65.9	33.2	35.9	48.5	39.1	28.9	55.6	52.7	60.9
DEL TACO	42.5	96	38.9	65.3	34.1	39.1	48.5	31.1	22.5	47.0	51.0	62.3
TACO JOHN'S**	41.7	101	35.7	54.9	33.3	36.7	41.0	35.0	28.1	51.3	54.0	62.2



First timer **Jet's Pizza**, based in Sterling Heights, Mich., with more than 300 locations, shook up the pizza players, taking the top scores for Food Quality, Reputation, Craveability, Likely to Recommend and Likely to Return. Consumers love category winner **Papa Murphy's Take 'N' Bake Pizza** for Cleanliness and Service, but **Godfather's Pizza** won in Menu Variety. **Little Caesars Pizza**, with its \$5 Hot-N-Ready lunch combo, took the honors for Value, while **Chuck E. Cheese's** won in Atmosphere.

Pizza/Italian

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
PAPA MURPHY'S TAKE 'N' BAKE PIZZA	64.7%	12	73.1%	74.7%	71.1%	67.0%	50.1%	64.7%	39.9%	56.5%	69.7%	73.8%
JET'S PIZZA**	60.4	27	75.9	51.0	57.0	60.9	45.1	65.0	41.3	66.7	76.9	74.9
GODFATHER'S PIZZA**	58.1	35	68.8	49.2	52.0	62.2	55.2	57.0	50.1	54.8	69.8	66.2
ROUND TABLE PIZZA	54.6	56	70.6	36.4	49.7	48.1	41.7	63.2	45.4	59.1	67.4	61.9
FAZOLI'S**	54.2	57	56.8	54.5	55.3	52.3	51.3	51.0	47.8	53.3	61.6	55.7
PAPA JOHN'S PIZZA	51.5	67	60.5	54.3	47.6	52.3	40.8	56.5	32.7	53.1	57.8	59.9
HUNGRY HOWIE'S PIZZA**	50.9	70	55.8	64.4	38.4	49.6	37.4	49.3	33.5	53.6	71.0	64.0
CICI'S PIZZA	50.3	72	44.0	72.2	41.1	47.1	47.8	46.9	36.5	50.3	60.0	56.7
PIZZA HUT	49.5	74	57.3	48.5	44.7	46.8	45.1	50.7	37.7	54.1	56.5	60.3
DOMINO'S PIZZA	47.2	81	49.1	57.3	40.1	46.6	44.6	47.2	29.5	51.9	53.4	56.9
SBARRO	42.7	95	49.6	40.9	41.2	37.1	40.2	38.9	34.6	47.0	50.1	48.7
LITTLE CAESARS PIZZA	42.3	98	35.6	76.8	39.0	42.8	23.0	38.6	23.3	40.9	51.6	59.1
CHUCK E. CHEESE'S	34.8	105	28.8	28.3	32.5	36.9	24.9	42.7	52.6	23.7	49.0	43.8

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

Sandwich

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
McALISTER'S DELI	65.8%	10	78.6%	49.2%	74.8%	67.8%	68.2%	67.1%	53.5%	53.5%	70.3%	62.9%
POTBELLY SANDWICH WORKS	62.4	17	70.2	50.3	72.4	67.2	42.0	65.8	59.4	57.9	68.7	65.8
FIREHOUSE SUBS	61.9	19	76.3	42.9	62.7	62.4	54.7	66.7	51.2	63.1	71.8	67.3
JASON'S DELI	61.0	22	74.0	46.3	59.3	55.3	70.7	65.7	48.8	50.1	73.9	66.1
CHARLEY'S GRILLED SUBS**	60.2	28	73.2	52.3	57.1	58.1	54.6	59.2	49.2	65.2	70.4	60.1
JERSEY MIKE'S SUBS	59.9	31	73.8	46.4	63.5	69.5	50.0	59.7	43.4	54.7	69.0	65.5
SCHLOTZSKY'S DELI	59.0	32	77.9	42.5	62.3	56.6	48.5	59.0	50.0	59.2	67.0	62.6
TOGO'S**	58.1	36	64.7	50.2	63.8	63.2	51.9	52.8	46.6	57.4	67.2	65.4
JIMMY JOHN'S GOURMET SANDWICHES	56.4	45	63.6	51.9	60.0	67.0	43.7	61.3	39.7	51.3	63.3	53.8
SUBWAY	55.4	50	59.5	68.1	52.5	53.4	51.7	60.0	36.1	46.4	61.7	70.4
BLIMPIE	50.3	73	56.3	51.1	52.9	50.2	39.8	43.0	44.3	45.7	57.8	52.3
QUIZNOS	48.1	76	57.4	44.5	50.2	47.1	48.2	45.3	37.0	47.3	52.2	46.6
ARBY'S	42.1	99	51.1	34.1	40.3	39.6	40.7	41.7	28.8	45.6	51.2	49.9
WIENERSCHNITZEL	42.0	100	41.4	53.2	36.2	34.2	34.7	42.4	26.5	49.4	56.2	62.6



McAlister's Deli, which finished sixth in this category in last year's survey, rose this year to the top spot, and took top scores in Food Quality, Cleanliness and Reputation. **Potbelly Sandwich Works**, which last year had the highest Overall Score, moved to second place but remained No.1 in Atmosphere for the second year in a row. **Jason's Deli**, which offers a variety of sandwiches, soups, salads and wraps, won for Menu Variety and Likely to Recommend. Meanwhile, **Subway**, known for its \$5 Footlongs and frequent limited-time offers, clinched the top scores in Value and Likely to Return.

Specialty

CHAIN	OVERALL SCORE*	OVERALL LSR RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
DICKEY'S BARBECUE PIT	50.4%	71	64.9%	38.8%	55.5%	50.8%	38.7%	49.6%	38.8%	53.3%	56.9%	54.0%
CAPTAIN D'S SEAFOOD	49.4	75	53.0	49.3	49.4	46.3	44.2	46.1	38.2	52.1	55.5	58.2
LONG JOHN SILVER'S	45.7	85	51.2	44.5	42.8	43.4	37.5	43.4	36.5	54.2	55.6	55.0

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Setting the mood

BY MARK BRANDAU

The Cheesecake Factory recaptured its spot as the top-ranked Casual-Dining chain overall in the 2014 Consumer Picks survey, leading all the segment's brands by a statistically significant margin in scores for Menu Variety and Reputation, but eking out only a small lead in its Overall Score.

The Calabasas Hills, Calif.-based chain, which is known for its voluminous menu, was bested by runner-up Bonefish Grill in such attributes as Cleanliness and Service, and by Mellow Mushroom Pizza Bakers, at No. 5 overall, in Food Quality, Craveability, Likely to Recommend and Likely to Return.

And when it comes to Atmosphere — the so-called X factor

by more than 23 percentage points in that attribute.

Some brands that ranked highly overall did not necessarily achieve stellar marks for guests' Likelihood to Return, probably owing to their reputations as special-occasion restaurants with relatively lower value perceptions. The Melting Pot, for instance, had the fourth-lowest Likely to Return score of all Casual-Dining chains in the survey, despite attaining the sixth highest Overall Score. Hard Rock Cafe had the second-lowest Likely to Return score, likely due in large part to its international footprint comprised mostly of tourist destinations that many respondents would not visit regularly.

Dave & Buster's adult arcade positioning netted the chain the third-highest attribute score for Atmosphere, yet lower scores for Craveability, Food Quality and Service dragged the Dallas-based chain down to the No. 29 ranking.

The Consumer Picks data also found that Menu Variety was a way many Casual-Dining brands were able to differentiate themselves within their subsegments — so long as that variety was paired with high marks for Food Quality. The study's top two brands overall, Cheesecake Factory and Bonefish Grill, locked up the No. 1 spots in the Varied-Menu and Seafood categories, respectively, by having the highest scores for both Menu Variety and Food Quality.

The next three top overall brands came from the Italian subsegment: Carrabba's Italian Grill, Olive Garden and Mellow Mushroom Pizza Bakers. All three received above-median Menu Variety scores and above-median Food Quality marks.

But even brands that gained credibility from consumers for their Menu Variety suffered low Overall Scores if other attributes failed to achieve similar marks. Established bar-and-grill chains such as Applebee's Neighborhood Grill & Bar, Chili's Grill & Bar and Ruby Tuesday had respectable scores for Menu Variety, but they finished Nos. 36, 35 and 32 overall, respectively, due to lower scores for Cleanliness, Reputation, Craveability and the all-important Atmosphere. ■

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**NO. 1 OVERALL SCORER
THE CHEESECAKE
FACTORY**



for Casual Dining, or the attribute that matters most to consumers after the basics of Food Quality, Cleanliness, Service and Value are met — Hard Rock Cafe was the category standout. High scores for both Atmosphere and Reputation, where it was second only to Cheesecake Factory, helped to push the Orlando, Fla.-based chain up to No. 14 overall from No. 27 in the 2013 survey.

Interestingly, a report last November from social media research firm MomentFeed noted that Hard Rock and Cheesecake Factory were two of the three restaurants most photographed per location on Instagram, supporting the finding that guests like Hard Rock's memorabilia-driven decor and Cheesecake Factory's upscale-casual atmosphere enough to share photos of those settings on social media.

Romano's Macaroni Grill also jumped up this year's list, from No. 17 overall in 2013 to the No. 9 spot. It was buoyed by comparatively high scores for Atmosphere, Food Quality, Cleanliness and Service.

Brands that ranked higher overall scored significantly lower for Value, with Cheesecake Factory lagging No. 12 Cheddar's

**NO. 2 OVERALL SCORER
BONEFISH GRILL**



**NO. 3 OVERALL SCORER
CARRABBA'S ITALIAN GRILL**



The X factor

Beyond Food Quality, Cleanliness, Service and Value — which are universally important across segments — Atmosphere is the attribute that consumers said can most set a Casual-Dining chain apart.



Food Quality:
93.1%



Cleanliness:
89.0%



Service:
84.8%



Value:
69.2%



ATMOSPHERE:
67.8%



Menu Variety:
65.9%



Craveability:
59.6%



Reputation:
57.9%



Likely to Recommend:
38.5%

SCORES ARE PERCENTAGE OF RESPONDENTS WHO SAID EACH ATTRIBUTE WAS "ESSENTIAL" OR "VERY IMPORTANT."

Winning them over Chains shown received the highest score in the attribute(s) listed



- FOOD QUALITY • CRAVEABILITY
- LIKELY TO RECOMMEND
- LIKELY TO RETURN



- CLEANLINESS
- SERVICE



- VALUE



- MENU VARIETY
- REPUTATION



- ATMOSPHERE

Casual-Dining brands ranked by Overall Scores

RANK	CHAIN	SCORE*	RANK	CHAIN	SCORE*	RANK	CHAIN	SCORE*
1	The Cheesecake Factory	74.9	14	Hard Rock Cafe	67.1	27	Old Chicago**	61.4
2	Bonefish Grill	74.1	15	California Pizza Kitchen	66.7	28	O'Charley's	60.8
3	Carrabba's Italian Grill	72.7	16	Joe's Crab Shack	66.4	29	Dave & Buster's	60.8
4	Olive Garden	70.7	17	Outback Steakhouse	66.1	30	Sonny's BBQ**	60.3
5	Mellow Mushroom Pizza Bakers	70.0	18	BJ's Restaurant & Brewhouse	65.6	31	Hooters	60.1
6	The Melting Pot	70.0	19	Red Robin Gourmet Burgers	65.1	32	Ruby Tuesday	59.9
7	Buca di Beppo	69.9	20	Famous Dave's	63.6	33	Ninety Nine Restaurant & Pub**	58.7
8	P.F. Chang's	69.5	21	Lone Star Steakhouse	63.3	34	Johnny Carino's Italian/ Carino's Italian Grill	58.3
9	Romano's Macaroni Grill	69.1	22	Uno Chicago Grill/Pizzeria Uno	63.2	35	Chili's Grill & Bar	57.9
10	LongHorn Steakhouse	68.9	23	Chevys Fresh Mex	62.9	36	Applebee's Neighborhood Grill & Bar	56.8
11	Texas Roadhouse	68.1	24	Logan's Roadhouse	62.7	37	Buffalo Wild Wings Grill & Bar	54.3
12	Cheddar's	67.7	25	Mimi's Cafe	62.4	38	On the Border Mexican Grill & Cantina	51.2
13	Red Lobster	67.7	26	TGI Fridays	62.2			



1 THE CHEESECAKE FACTORY'S FRESH STRAWBERRY CHEESECAKE



38 ON THE BORDER MEXICAN GRILL & CANTINA'S HAND-ROLLED ENCHILADAS

*AVERAGE OF ATTRIBUTE SCORES, WEIGHTED BY ATTRIBUTE IMPORTANCE. LIKELY TO RETURN DATA ARE NOT WEIGHTED AND ARE THEREFORE NOT INCLUDED IN CHAINS' OVERALL SCORES.
**100-149 RESPONSES

Coming back for more

Whether or not a customer comes back is the true test of any brand. Below are the five Casual-Dining chains with the most consumers saying they "definitely" or "probably" would return.



MELLOW MUSHROOM PIZZA BAKERS



CARRABBA'S ITALIAN GRILL



NINETY NINE RESTAURANT & PUB**



OLIVE GARDEN



RED LOBSTER

**100-149 RESPONSES

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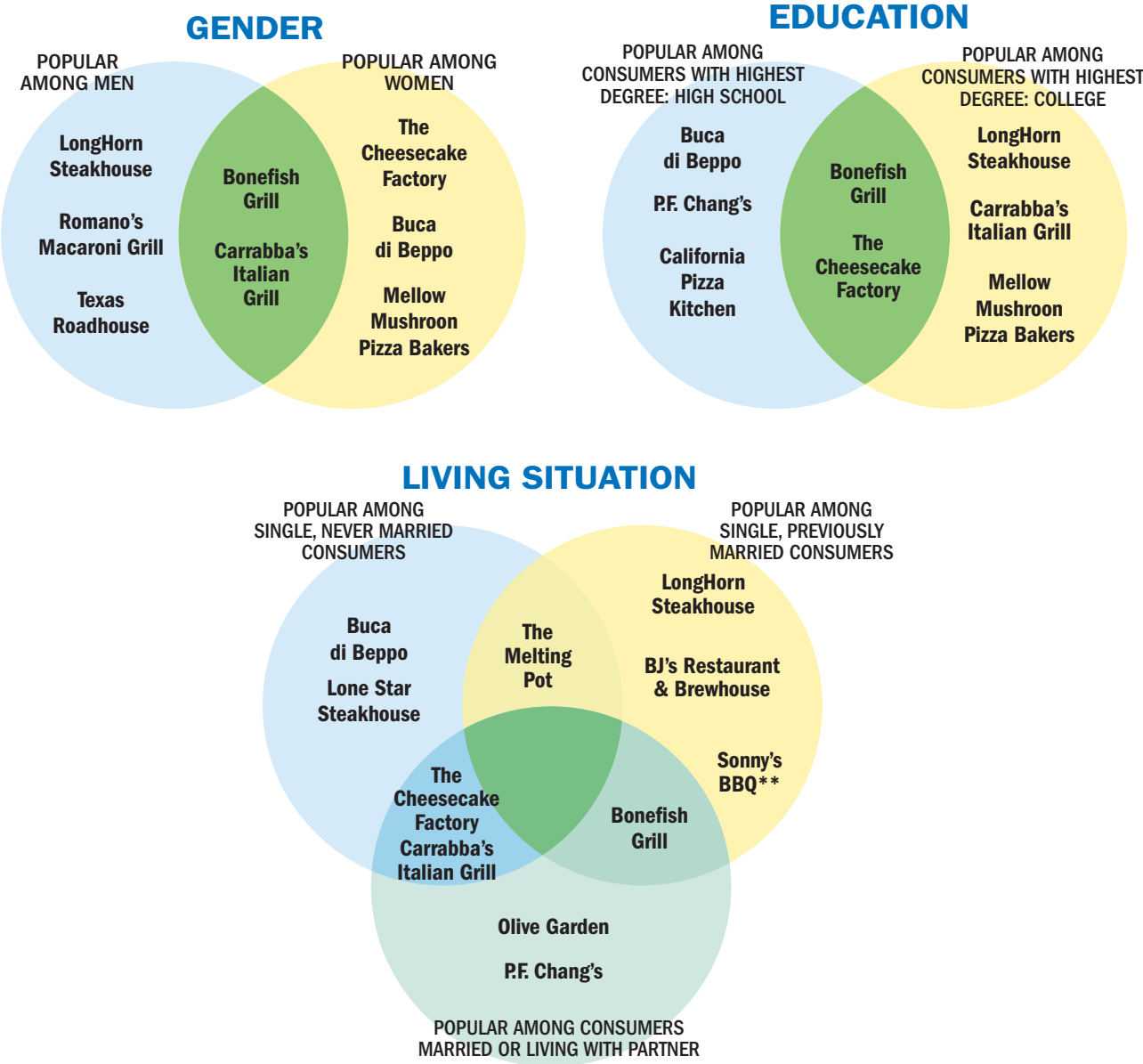


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DEMOGRAPHIC TRENDS After respondents completed this year's Consumer Picks survey, their answers were sorted using commonly accepted demographic groups based on a respondent's gender, age, income and living situation. The result is a look at what brands scored well with the various groups as well as insights into the factors driving their dining decisions.

People's choice

Charts represent the five chains with the highest Overall Scores among each demographic



Demographic differences

Consumer Picks respondents ranked the importance of the survey's dining-out attributes. Results were categorized by demographic groupings, and insights here represent areas where importance rankings differed by a statistically significant margin, or at least five percentage points.

● Baby boomers and seniors

gave noticeably more importance to the **Service** and **Menu Variety** attributes than did their younger counterparts.

● Millennials

placed greater importance than older diners on **Craveability** and the **Likely to Recommend** metric.

● Survey participants with annual household incomes of less than \$50,000

gave more weight than those with higher income levels to **Menu Variety**.

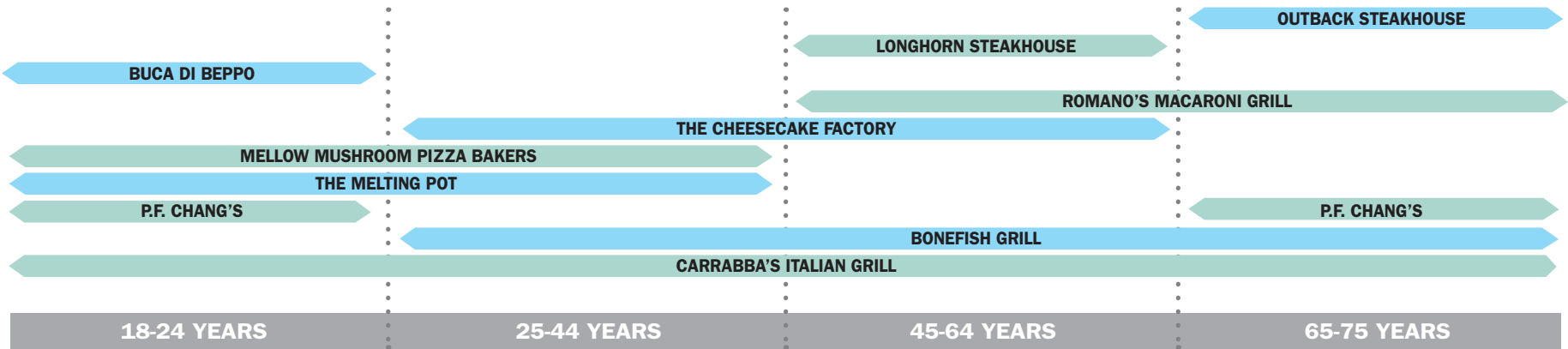


● Those lower-income consumers

also paid greater attention to **Value** than did their peers with annual household incomes of \$100,000 or more. Those consumers also placed higher emphasis on **Craveability**.

Generation gaps and overlaps

Top five Casual-Dining brands among each age group



**100-149 RESPONSES

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

Italian/Pizza

CHAIN	OVERALL SCORE*	OVERALL CASUAL RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CARRABBA'S ITALIAN GRILL	72.7%	3	83.4%	45.6%	76.3%	74.5%	71.0%	76.0%	75.7%	66.6%	76.4%	68.4%
OLIVE GARDEN	70.7	4	75.9	52.3	77.8	73.7	70.2	73.0	72.2	62.1	72.8	65.4
MELLOW MUSHROOM PIZZA BAKERS	70.0	5	87.9	43.0	66.1	61.2	65.8	76.8	70.2	73.6	82.4	68.8
BUCA DI BEPPO	69.9	7	77.7	57.7	69.5	70.7	65.9	74.3	72.9	61.0	77.1	55.5
ROMANO'S MACARONI GRILL	69.1	9	74.5	48.7	78.4	71.7	64.6	68.3	78.4	60.7	67.3	56.5
JOHNNY CARINO'S ITALIAN/ CARINO'S ITALIAN GRILL	58.3	34	66.3	37.2	61.4	67.2	59.6	53.7	60.5	42.7	60.4	51.6



Mellow Mushroom Pizza Bakers led its subsegment peers in Food Quality, Reputation, Craveability, Likely to Recommend and Likely to Return. The Atlanta-based brand with more than 150 units jumped five spots in the Casual-Dining overall rankings, from No. 10 last year to No. 5 this year.

Seafood

CHAIN	OVERALL SCORE*	OVERALL CASUAL RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
BONEFISH GRILL	74.1%	2	83.7%	37.2%	81.4%	82.9%	72.2%	79.2%	77.0%	64.4%	80.8%	62.9%
RED LOBSTER	67.7	13	77.1	43.7	73.6	71.4	67.3	66.3	65.1	64.6	73.8	65.3
JOE'S CRAB SHACK	66.4	16	69.0	44.8	61.4	69.1	69.7	70.9	72.3	68.7	67.0	54.9



Bonefish Grill ran away with the seafood category by netting the top scores in seven of 10 attributes. **Joe's Crab Shack** took the top spots for Value and Craveability within the subsegment, and consumers said they were most Likely to Return to **Red Lobster**. Bonefish Grill, however, blew both away on Service, an attribute in which it led all Casual-Dining chains.

Steak

CHAIN	OVERALL SCORE*	OVERALL CASUAL RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
LONGHORN STEAKHOUSE	68.9%	10	81.9%	48.0%	75.5%	72.3%	61.0%	69.6%	68.1%	61.5%	72.8%	62.4%
TEXAS ROADHOUSE	68.1	11	82.7	48.0	60.8	73.6	63.2	68.2	68.5	64.5	77.5	64.5
OUTBACK STEAKHOUSE	66.1	17	77.0	43.1	71.0	70.7	63.1	71.7	65.0	59.9	67.8	59.3
LONE STAR STEAKHOUSE	63.3	21	68.7	42.8	69.6	68.6	66.5	64.8	61.0	55.9	62.8	56.8
LOGAN'S ROADHOUSE	62.7	24	73.2	52.2	61.4	68.0	61.2	58.9	59.8	52.9	71.0	62.2



Despite having the best Reputation score among the five brands in the steak subsegment, **Outback Steakhouse** took a step back in Consumer Picks this year, falling to No. 17 overall in Casual Dining from No. 9 last year, and from second to third place among its steak peers. **LongHorn Steakhouse** continued its rein in the subsegment, despite **Texas Roadhouse** dominating six of the 10 attributes.

Varied Menu/Specialty

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	74.9%	1	83.1%	42.4%	78.5%	77.5%	85.8%	84.2%	75.3%	67.7%	72.4%	59.6%
THE MELTING POT	70.0	6	74.9	32.7	79.2	78.4	55.8	78.1	79.2	62.9	77.2	51.4
P.F. CHANG'S	69.5	8	81.7	35.7	77.1	67.9	66.7	79.4	74.3	62.4	71.8	58.8
CHEDDAR'S	67.7	12	72.2	65.9	71.6	61.5	75.8	65.6	64.5	56.5	73.0	61.7
HARD ROCK CAFE	67.1	14	67.3	43.2	75.5	68.0	64.4	80.1	80.4	55.1	64.7	49.4
CALIFORNIA PIZZA KITCHEN	66.7	15	82.5	37.3	73.6	63.1	68.8	72.5	66.1	57.0	70.8	53.8
BJ'S RESTAURANT & BREWHOUSE	65.6	18	68.7	35.9	76.8	63.6	77.0	66.9	73.0	53.8	66.5	56.2
RED ROBIN GOURMET BURGERS	65.1	19	77.3	39.7	66.6	65.9	63.3	67.8	64.7	65.3	69.4	61.8
FAMOUS DAVE'S	63.6	20	76.1	47.1	60.0	65.8	53.8	65.6	60.7	62.7	72.1	57.5
UNO CHICAGO GRILL/PIZZERIA UNO	63.2	22	67.2	52.2	68.5	63.4	63.7	62.2	60.1	59.5	63.7	52.9
CHEVYS FRESH MEX	62.9	23	65.4	57.9	62.0	64.8	63.2	57.5	60.5	60.2	67.3	64.3
MIMI'S CAFE	62.4	25	72.5	40.5	73.4	65.0	61.0	60.3	65.0	50.4	62.9	50.6
TGI FRIDAYS	62.2	26	64.0	51.3	64.7	61.0	67.6	60.3	62.8	55.8	67.9	61.9
OLD CHICAGO**	61.4	27	73.2	43.9	67.2	61.2	57.4	61.6	60.8	53.8	66.1	65.1
O'CHARLEY'S	60.8	28	70.3	47.3	70.4	57.9	61.8	60.0	57.2	45.5	70.3	63.0
DAVE & BUSTER'S	60.8	29	58.0	46.8	67.0	60.2	62.7	66.0	77.2	44.5	61.8	52.8
SONNY'S BBQ**	60.3	30	67.3	59.3	58.3	62.3	55.5	65.3	47.6	59.3	64.5	63.7
HOOTERS	60.1	31	58.6	44.6	58.2	73.6	53.2	62.3	70.1	53.6	62.5	59.5
RUBY TUESDAY	59.9	32	68.6	44.0	64.7	60.6	65.3	57.4	56.3	48.4	62.6	55.7
NINETY NINE RESTAURANT & PUB**	58.7	33	60.2	58.6	60.5	57.2	60.4	53.5	59.2	42.1	66.8	66.1
CHILI'S GRILL & BAR	57.9	35	62.3	47.0	59.8	60.8	66.2	53.7	51.3	53.2	60.6	58.2
APPLEBEE'S NEIGHBORHOOD GRILL & BAR	56.8	36	59.5	42.6	59.6	62.0	66.9	55.9	52.7	43.0	62.1	61.7
BUFFALO WILD WINGS GRILL & BAR	54.3	37	61.9	39.0	50.9	51.2	48.8	59.3	56.9	57.2	61.0	55.7
ON THE BORDER MEXICAN GRILL & CANTINA	51.2	38	57.1	46.3	47.8	54.0	54.9	45.0	50.2	48.1	53.2	49.1



Buffalo Wild Wings finished second to last in overall rankings for Casual-Dining brands in the Consumer Picks survey. Its category scores were among the lowest of all brands in Value, Cleanliness and Service, and it had the lowest score for Menu Variety. Its major brand initiatives for 2014 are aimed at addressing several of these attributes.

*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 "EXCELLENT" OR "GOOD" IN THAT AREA. LIKELY TO RETURN SCORES REFLECT THE PERCENT OF RESPONDENTS WHO SAID THEY "DEFINITELY" OR "PROBABLY" WILL VISIT A CHAIN AGAIN.

**100-149 RESPONSES

BY BRET THORN

Although the fine-dining category grew more robust in the 2014 Consumer Picks survey with the addition of two new chains, Ruth's Chris Steak House maintained its grip on the top spot. The Heathrow, Fla.-based chain, with 118 units, won top scores for seven of 10 attributes, including Value, Cleanliness, Service, Menu Variety, Reputation, Craveability and Likelihood to Recommend. Morton's the Steakhouse, No. 2 overall in the category for the second straight year, won on Atmosphere. With the exception of scores for Value, Craveability and Likelihood to Recommend, the scores for Ruth's Chris and Morton's were statistically equivalent.



New to the Fine-Dining category in this year's Consumer Picks report, Fleming's Prime Steakhouse & Wine Bar snagged the top score in Food Quality.

The highest marks for Food Quality went to newcomer Fleming's Prime Steakhouse & Wine Bar, a 65-unit chain owned by Tampa, Fla.-based Bloomin' Brands Inc. The category's other newcomer, The Capital Grille, a 50-unit chain owned by Orlando, Fla.-based Darden Restaurants Inc., grabbed the top score for Likelihood to Return. McCormick & Schmick's, the only chain in the category not intimately associated with steak, landed at the bottom of the list, with significantly lower marks than the other four chains in terms of Craveability. Ruth's Chris, with its distinctive, butter-topped steaks, scored more than 21 percentage points higher. Ruth's Chris' top marks for Menu Variety and Value can be linked to its Sizzle, Swizzle & Swirl Happy Hour promotion of bar snacks, including smoked salmon with lemon crème fraîche and herbed flatbread crisps, sliced seared ahi tuna, and a crab BLT on grilled garlic bread served with zucchini fries and roasted red pepper-ranch sauce. All of those items are priced at \$7 during happy hour and \$11 to \$16 afterward. ■

CHAIN	OVERALL SCORE*	OVERALL FINE-DINING RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
RUTH'S CHRIS STEAK HOUSE	83.3%	1	92.2%	47.8%	88.6%	91.2%	76.2%	91.5%	85.6%	81.0%	85.6%	67.0%
MORTON'S THE STEAKHOUSE	80.7	2	93.1	41.0	85.6	89.0	73.3	91.4	86.9	73.1	78.4	64.4
FLEMING'S PRIME STEAKHOUSE & WINE BAR**	79.9	3	94.1	47.1	86.3	85.0	71.3	83.2	85.9	73.7	78.4	64.4
THE CAPITAL GRILLE	78.3	4	87.9	47.1	82.8	79.5	74.3	82.2	80.9	74.1	85.0	69.7
MCCORMICK & SCHMICK'S	75.8	5	86.2	43.9	83.1	79.7	72.1	83.3	84.0	59.9	77.1	53.2

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Giving them options

BY BRET THORN

Boasting the highest scores in seven of 10 attributes, The Original Pancake House ousted Cracker Barrel Old Country Store from the No. 1 position it had held in three prior Consumer Picks surveys.

Although 616-unit Cracker Barrel still garnered top scores for Atmosphere and Menu Variety — the attribute most important to Family-Dining customers after Food Quality, Cleanliness, Service and Value — Original Pancake House, a 121-unit chain based in Portland, Ore., won the highest scores for Food Quality, Value, Service, Reputation, Craveability, Likely to Recommend and Likely to Return. Last year, Original Pancake House ranked third among its Family-Dining peers.

Bob Evans Restaurants, which was in second place last year, dropped to third place, but it earned the top score in Cleanliness.

“We just try to recreate what my children’s great grandfather did 60 years ago,” said Jon Liss, general counsel and corporate chef for Original Pancake House. Liss was given that title after marrying into the family that franchises the chain.

Original Pancake House’s headquarters is located over the concept’s original restaurant in Portland. Liss and three other family



members are the only employees. They have no additional support staff in the field or in-house and rely on their franchisees — every location except for the first one is franchised — to run and market the restaurants, Liss said.

“We eschew all social media at the corporate level,” he said. “Our focus is simply the next plate of food on the table.”

The chain has an ardent fan base, however, that has recently pushed it from a cult favorite to a national phenomenon, Liss noted. Original Pancake House’s score for Craveability was notably higher than those of other Family-Dining chains and nearly 16 percentage points higher than runner-up Cracker Barrel. Original Pancake House is known for such unique menu items as its Apple Pancake, Dutch Baby and Sourdough Flap Jacks.

“There’s a viral quorum, if you want to put it that way,” Liss said. “In the past two to three years we’ve broken through to get a national reputation. There are more franchisees involving themselves in social media, and that might have some impact.”

The brand opened six restaurants in the past year and plans to open at least four more this year, Liss said — a respectable speed for a family-dining concept given the current economic climate.

Cracker Barrel’s strength in Menu Variety derives from offer-

ings that range from country ham and fried catfish to chicken and dumplings, pork chops and chopped steak, as well as more than 20 side dishes. The Lebanon, Tenn.-based chain also offers hamburgers, turkey sandwiches, open-faced roast beef sandwiches, soups, salads, desserts and a comprehensive breakfast menu. Last August, Cracker Barrel further expanded its offerings with its lower-calorie Wholesome Fixin’s menu line, featuring dishes with fewer than 550 calories.

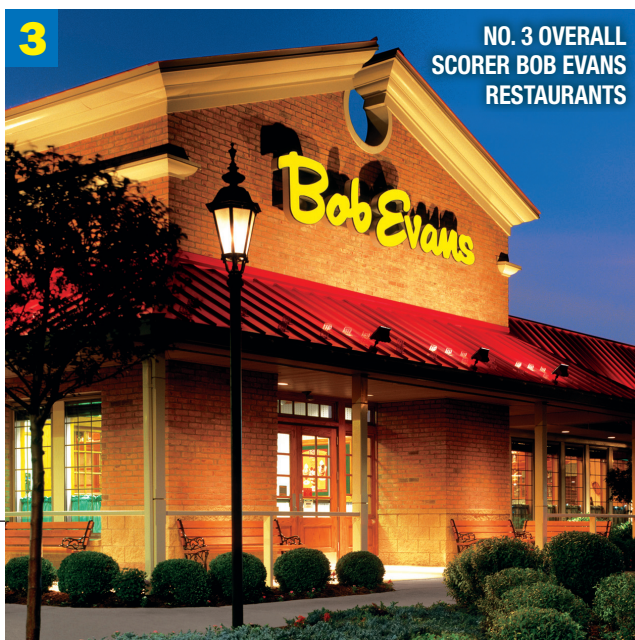
IHOP also scored well in terms of Menu Variety, helping it to move up one slot to the No. 4 position overall. The 1,500-unit subsidiary of Glendale, Calif.-based DineEquity Inc. introduced several new items in the past year, including a line of sandwiches on grilled sourdough called Griddle Melts and Belgian waffles covered with whipped cream and a choice of three fruit toppings.

IHOP also kept its guests engaged with limited-time offerings, including seasonal varieties of its Stuffed French Toast and, this past summer, a line of sweet pancakes that included Jelly Donut, Tiramisu and Banana Nut Graham varieties.

Many of the Family-Dining chains maintained similar rankings to last year’s, except for Big Boy, which moved from fourth place to eighth place, and Village Inn, which went from eighth place to fifth.

Coco’s, a 110-unit chain based in Carlsbad, Calif., is new to the list this year, ranking No. 6 overall with only 100 to 149 responses. Village Inn, Big Boy, Shoney’s and Huddle House also only received between 100 and 149 responses. ■

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The X factor

Beyond Food Quality, Cleanliness, Service and Value — which are universally important across segments — Menu Variety is the attribute that consumers said can most set a Family-Dining chain apart.



Food Quality:
89.5%



Cleanliness:
86.3%



Service:
76.1%



Value:
73.1%



MENU VARIETY:
60.3%



Atmosphere:
53.4%



Craveability:
52.5%



Reputation:
48.7%



Likely to Recommend:
30.2%

SCORES ARE PERCENTAGE OF RESPONDENTS WHO SAID EACH ATTRIBUTE WAS “ESSENTIAL” OR “VERY IMPORTANT.”

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

Family

CHAIN	OVERALL SCORE*	OVERALL FAMILY RANK	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
THE ORIGINAL PANCAKE HOUSE	70.6%	1	72.9%	62.6%	67.4%	74.8%	66.8%	74.3%	65.0%	71.0%	78.8%	70.7%
CRACKER BARREL OLD COUNTRY STORE	67.8	2	68.7	58.8	68.3	69.0	73.9	72.9	66.2	55.1	73.0	64.7
BOB EVANS RESTAURANTS	63.4	3	65.6	58.1	69.4	68.1	71.4	63.9	56.4	45.6	65.5	62.5
IHOP	56.6	4	58.5	54.9	54.1	54.9	67.8	57.5	43.9	52.4	62.6	58.6
VILLAGE INN**	54.6	5	56.2	55.4	54.8	58.0	55.3	53.6	46.5	49.1	56.3	56.5
JOHNNY ROCKETS	52.7	6	54.8	43.7	55.2	58.9	42.9	48.4	61.0	47.8	59.3	48.2
COCO'S**	51.0	7	54.8	45.8	61.6	56.8	56.2	41.0	35.5	36.9	59.2	47.2
BIG BOY**	50.7	8	52.2	48.1	49.4	51.5	57.1	46.3	40.5	49.8	57.3	57.0
PERKINS RESTAURANT & BAKERY	49.1	9	50.6	47.9	51.9	50.6	62.3	47.3	34.6	36.0	53.8	54.1
DENNY'S	48.3	10	45.8	55.6	40.6	46.5	60.6	45.9	39.8	43.4	51.2	51.1
SHONEY'S**	46.4	11	45.6	43.3	42.0	52.8	51.2	45.1	36.8	40.2	57.2	50.6
WAFFLE HOUSE	45.2	12	43.1	56.2	32.8	45.9	51.7	40.8	32.0	49.9	57.0	58.4
FRIENDLY'S	44.2	13	44.3	50.5	40.0	45.5	49.3	36.2	31.9	45.1	51.0	51.2
HUDDLE HOUSE**	36.2	14	29.4	54.0	26.7	38.1	37.1	32.1	32.3	34.0	43.3	44.4



The Original Pancake House moved up the list in the Family-Dining segment this year, capturing the No. 1 spot and pushing longtime leader Cracker Barrel Old Country Store to the runner-up position and Bob Evans Restaurants, last year's No. 2, down to third place. Between the three brands, they captured top scores for all 10 attributes. Original Pancake House held a huge advantage over its peers for Craveability, winning a score nearly 16 percentage points higher than the next closest brand, Cracker Barrel.

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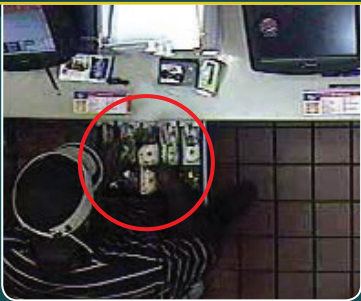
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Family-Dining brands ranked by Overall Scores

RANK	CHAIN	SCORE*
1	Original Pancake House	70.6%
2	Cracker Barrel Old Country Store	67.8
3	Bob Evans Restaurants	63.4
4	IHOP	56.6
5	Village Inn**	54.6
6	Johnny Rockets	52.7
7	Coco's**	51.0
8	Big Boy**	50.7
9	Perkins Restaurant & Bakery	49.1
10	Denny's	48.3
11	Shoney's**	46.4
12	Waffle House	45.2
13	Friendly's	44.2
14	Huddle House**	36.2

Coming back for more

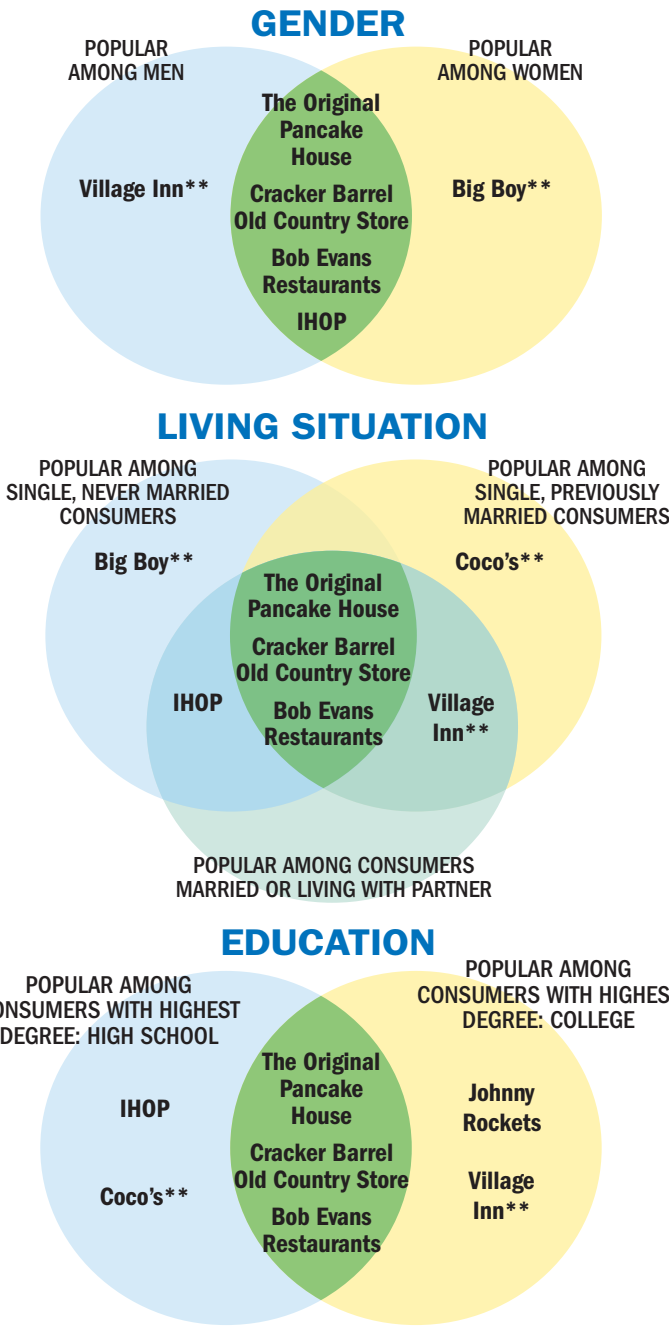
Whether or not a customer comes back is the true test of any brand. Below are the five Family-Dining chains with the most consumers saying they “definitely” or “probably” would return.



DEMOGRAPHIC TRENDS After respondents completed this year’s Consumer Picks survey, their answers were sorted using commonly accepted demographic groups based on a respondent’s gender, age, income and living situation. The result is a look at what brands scored well with which groups and what factors are driving their dining decisions.

People’s choice

Charts represent the five chains with the highest Overall Scores among each demographic



Demographic differences

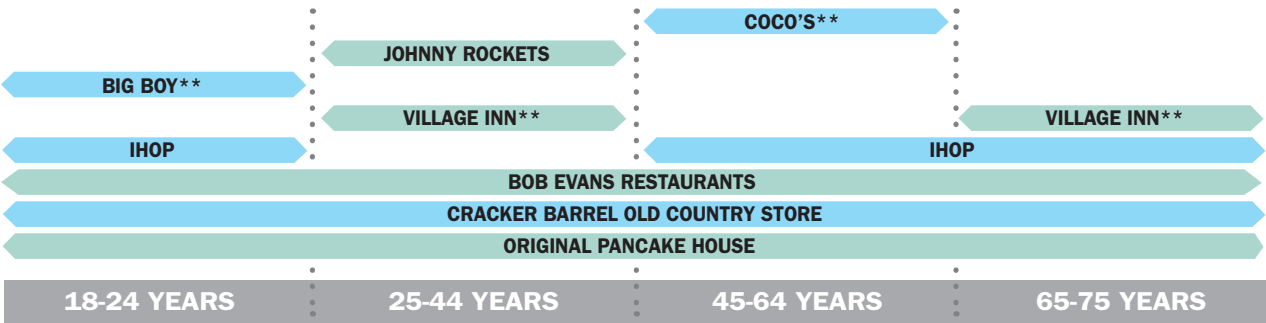
Consumer Picks respondents ranked the importance of the survey’s dining-out attributes. Results were categorized by demographic groupings, and insights here represent areas where importance rankings differed by a statistically significant margin, or at least five percentage points.

- Boomers and seniors** placed a higher priority on **Cleanliness** than did their Millennial counterparts.
- Millennial** consumers, meanwhile, placed a greater value than did older consumers on **Craveability** and the **Likely to Recommend** metric. They also reported that **Atmosphere** is important to them in a family-dining setting.
- Consumers who are **married or living with a partner** placed a higher value on **Service** and **Menu Variety** than respondents who are single.
- Consumers with annual household incomes of **less than \$50,000** paid greater attention to **Value, Craveability** and **Reputation** than did respondents with annual household incomes of \$100,000 or more.



Generation gaps and overlaps

Top five Family-Dining brands among each age group



*OVERALL SCORES ARE AN AVERAGE OF ATTRIBUTE SCORES, EXCEPT FOR LIKELY TO RETURN, AND ARE WEIGHTED BY ATTRIBUTE IMPORTANCE. **100-149 RESPONSES

Understanding the numbers

This issue of Nation's Restaurant News contains the fourth annual Consumer Picks survey. Each year the survey has gotten bigger and better, containing more restaurant brands and new insights. The 2014 study keeps this trend intact.

This year the survey includes 162 different brands, eight more than last year and 23 more than appeared in our first survey in 2011. In addition, nine new concepts are represented in this year's Consumer Picks: Limited-Service brands Great American Cookie, Jet's Pizza, Rubio's, Sarku Japan, Togo's and Tropical Smoothie Café; the Family-Dining brand Coco's; and two Fine-Dining brands, The Capital Grille and Fleming's Prime Steakhouse & Wine Bar.

This year's survey reflects more than 44,000 vetted consumer ratings. More detail on how we conduct the survey can be found in the methodology below. Suffice it to say, we use multiple screening techniques to identify and eliminate those responses that do not meet our tests for reliability.

Each year we make the point that, as in all surveys of this type, differences in closely ranked ratings should be considered statistically equivalent. This point is driven home when there is no difference in the reported scores, such as the score of 75.2 achieved



Dennis Lombardi

by both Häagen-Dazs and Cold Stone Creamery for Craveability. Digging a bit deeper, Häagen-Dazs had a score that was merely 0.013 percentage points higher. That small difference might matter in the Olympics, but not in Consumer Picks — or any other statistical survey of its type.

For reporting purposes, when two or more brands appear tied in the report, the order of listing is based on the next level of decimal point.

As in prior years, the survey looks at four industry segments: Limited Service, Casual Dining, Family Dining and Fine Dining. Both the Limited-Service and Casual-Dining segments have a number of subcategories. A minimum of three brands is needed to create a subcategory. There are always a few chains that do not fit neatly into any one category. The study allows a user to move any brand to any other subsegment without loss of accuracy — but not to any other of the four industry segments. Crossing these primary categories will introduce some error into the Overall Scores, as they are weighted by the importance attributes for the segment in which the brand appears.

The 2014 survey is consistent with those in prior years to facilitate year-to-year comparisons. These comparisons will, no doubt, be a rather common use of the data. For

that reason, I would like to offer a few suggestions and warnings.

If you look only at the difference in a brand's scores from year to year, you run the risk of drawing incorrect conclusions because that comparison does not take into ac-



Among the nine new entrants in the Consumer Picks survey this year are, clockwise from top, Togo's, Tropical Smoothie Café and Sarku Japan.

count the social and economic factors that may have changed over time and affected consumers' responses. A better process is to compare one brand's score against the average score for an identical group of competitors for both this year and last year. Then compare the relative difference between the subject brand and its group of competitors. WD Partners has created an Excel file to aid



you in making such comparisons. It can be downloaded at www.wdpartners.com/dennis-lombardi/downloads/.

WD Partners and NRN hope you find Consumer Picks 2014 to be a useful and valuable tool. ■

Dennis Lombardi is executive vice president of foodservice strategies for WD Partners.

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, and respondents were given a list of 178 restaurant chains organized into groups depending on the chain's service model as well as the respondent's location. They were asked to identify which restaurants they had patronized in the last six months, or since July 15, 2013, and if they had visited one, two, or three or more times during that time period.

Respondents were then asked to rate their experiences for up to eight of the restaurants they had patronized in the last six months. The six-month time was designed to increase the likelihood of reasonable recall by respondents and also ensure that respondents would represent a broader range of consumers and not just a brand's raving fans.

Responses were screened for inconsistent answers; "straight lining," or selecting the same response repeatedly; and excessive haste in completing the questionnaire.

This process reduced the number of acceptable responses to 5,761 from 6,868.

Sixteen of the 178 restaurants had fewer than 100 customer ratings and are not included in this report. The remaining 162 restaurant chains yielded a total of 44,458 ratings.

Twenty-five of these remaining 162 restaurant chains had between 100 and 149 ratings and are included in this report but are marked with a double asterisk to indicate they received less than the desired quota of 150 ratings. The final report includes 137 restaurant chains that were rated by at least 150 respondents, and the vast majority — 103 restaurant brands — were rated by more than 200 respondents.

The questionnaire was designed in-house by WD Partners and pre-tested by staff members familiar with survey methodologies. The firm worked with Survey Sampling International, which supplied panel respondents, and SurveyGizmo, which provided the survey administration software.

Results are shown as the percentage of top-two-box ratings received on a standard five-box scale. In the case of brand attribute scores, for example, the figures are the percentage of respondents who said a chain was "excellent" or "good." Brands' Overall Scores are a weighted average of attribute scores as calculated using their respective customer-reported

importance ratings, or the percentage of respondents who said an attribute was "essential" or "very important."

The survey addresses 10 attributes: Atmosphere, Cleanliness, Craveability, Food Quality, Likelihood to Recommend, Likelihood to Return, Menu Variety, Reputation, Service and Value.

Demographic information on the respondents was obtained to align the survey results with the U.S. population based on 2010 Census and 2010 Bureau of Labor Statistics reports.

As in all surveys of this type, closely ranked restaurant chains should be considered statistically equivalent.

The 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 Dennis. Lombardi@WDPartners.com. ■



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