



CONSUMER PICKS

NRN and WD Partners' second annual survey reveals how diners really feel about your brand

BY ROBIN LEE ALLEN

Restaurants have always been about the food, but the quality of that food has never been more important, according to the folks who matter most — your customers.

In the 2012 Consumer Picks survey, Food Quality rose to the top as the most important attribute across all three industry segments — Limited Service, Casual and Family — as determined by the 5,346 responses reflected in the survey. In the case of Limited Service and Family, Food Quality ousted Cleanliness, the attribute that had risen to the top for those segments in last year's survey.

That's just one of the notable findings to surface in this year's study — one that Nation's Restaurant News and WD Partners have strived to make bigger, better and more insightful than our inaugural survey last year.

To that end, this year's report includes 13 new restaurant chains, bumping the number of represented brands to 152; a new attribute, Craveability; and instructions on how to compare what consumers said about a brand in 2012 with what they said in 2011 — in other words, how to gauge their changing perceptions against a benchmark.

The 2012 survey results are based on 130,000 restaurant visits made in the six months since Dec. 15, 2012. Consumers, who were queried online, were asked to rate brands based on 10 attributes: Atmosphere, Cleanliness, Craveability, Food Quality, Likely to Recommend, Likely to Return, Menu Variety, Reputation, Service and Value. The methodology on the next page has more information about how responses were calculated and presented.

Along with Food Quality, Cleanliness and Service also ranked high in terms of importance to diners. Value only came in at No. 3 for Limited Service and placed as No. 4 for Family and Casual, underscoring again a finding from last year that Value is relatively unimportant compared to other attributes. Indeed, of the top Overall Scorers in each segment — newcomer Marble Slab Creamery in Limited Service, The Cheesecake Factory in Casual and Cracker Barrel Old Country Store in Family — none won the top score for Value, although they all clearly emerged as customer favorites.

Not surprisingly, the more customers pay, the more they expect restaurant brands to execute on all attributes. This is reflected in the average importance rating score, which rises from 57.4 percent for Limited Service to 63.8 percent for Family and 69.6 percent for Casual.

Given higher expectations for more expensive brands, this year we broke Fine Dining out as its own category to further refine the survey process and establish a set of metrics that more fully reflects the similarities and differences among the brands evaluated here.

In last year's Consumer Picks report, the two Fine-Dining chains — Ruth's Chris Steak House, based in Heathrow, Fla., and McCormick & Schmick's in Houston — were incorporated into the Casual-Dining category. But because both are high-ticket brands, the results were somewhat distorted and, consequently, the pair tended to outperform other chains in the category in the eyes of the consumers.

Clearly, when customers shell out more than \$30 for an entrée, they form different expectations about the dining experience, particularly where Food Quality, Atmosphere,

Service and Craveability are concerned. The decision to evaluate fine-dining chains apart from casual-dining brands is intended to address this issue more fairly and present more of an "apples to apples" comparison as the category expands in the future.

The survey's new attribute, Craveability, proved to have a big influence in the Limited-Service segment, where Food Quality and Craveability tended to go hand in hand for those brands ranked highest within their subsegments. Among those rewarded for both by consumers were Panera Bread, Krispy Kreme Doughnuts, In-N-Out Burger, Pei Wei Asian Diner, Souplantation/Sweet Tomatoes, Chick-fil-A and Chipotle Mexican Grill.

In the Casual segment, Menu Variety had the same impact. The brands that scored highest within their subsegments also had the highest score for Menu Variety, suggesting that consumers appreciate options even when they seek out a specialized cuisine such as Italian, Mexican, steak or seafood. Among those subsegment top scorers were Olive Garden, Bonefish Grill, Texas Roadhouse and The Cheesecake Factory.

In the following pages we dive further into the segments, the data and the surveys demographic findings. So turn the page to learn more about your patrons and what they think about you and your competition. ■

Paul Frumkin contributed to this article.



INSIDE

Survey insights	p2
Limited-Service rankings	p4
Casual/Fine-Dining rankings	p8
Family-Dining rankings	p11
Demographic preferences	p13

wd WD Partners developed the survey and administered it online to 6,800 restaurant customers.

Importance Rankings

Percent respondents reporting each attribute as important

LIMITED SERVICE

Food Quality	87.2%
Cleanliness	84.7
Value	71.7
Service	65.9
Craveability	52.8
Menu Variety	50.6
Reputation	43.5
Atmosphere	39.9
Likely to Recommend	20.7

FAMILY DINING

Food Quality	91.7%
Cleanliness	88.0
Service	78.5
Value	73.5
Menu Variety	61.6
Craveability	54.5
Atmosphere	52.9
Reputation	48.2
Likely to Recommend	25.6

CASUAL

Food Quality	94.1%
Cleanliness	90.0
Service	85.4
Value	69.8
Menu Variety	68.0
Atmosphere	66.1
Craveability	61.2
Reputation	57.1
Likely to Recommend	34.3

Understanding the numbers

This issue marks the second year of Consumer Picks, an industrywide survey reflecting how customers rate select restaurant chains. Because of the success of last year's survey, we were encouraged to make this year's review bigger and better.

The 2012 survey has attribute ratings on 152 chains, up from 139 chains in 2011. This year we also added an extra attribute, Craveability, to measure if a chain has menu items people crave.

In addition, this year we created a separate category for Fine Dining. While this segment only includes two chains represented in the survey, it will be easier to read and review the Casual-Dining segment without having to mentally "subtract" the Fine-Dining brands. Of course, we hope to grow the number of brands included in that segment in the 2013 Consumer Picks.

This year we are also including importance ratings for Limited Service, Family Dining and Casual. It is interesting to note that the importance attributes increase as check averages increase between each of these segments. Consumers are clear that if they are paying

more, they will expect more across the attribute spectrum.

These changes aside, much of the survey is consistent in format to the 2011 report in order to facilitate year-to-year comparisons. These assessments will undoubtedly be a common use of the data. As such, I would like to offer a few suggestions and warnings.

First, a warning: If you look at just the difference in a brand's scores from 2011 to 2012, you run the risk of drawing incorrect conclusions. To look only at one year over the other for any one brand does not take into account the time difference between the research or the economic and social factors that took place during the year, impacting consumers' responses.

A better way to make the comparison is to take one brand's score against the average score for an identical group of competitors, comparing the relative difference between the subject brand and its group of rivals.



Dennis Lombardi

Directly comparing how the subject brand is doing against a competitive set allows for more insightful evaluations.

In the example provided below, we use Red Robin Gourmet Burgers as the subject brand. To make the comparison, five competitors were chosen. I would recommend using a minimum of five competitors as the basis for comparison, although you can use more.

Looking at Red Robin's Overall Score in isolation shows almost no change — 66.5 percent in 2011 versus 66.6 percent in 2012. But when you look at these scores against the competitive set, where the average score dropped from 63.9 percent to 61.4 percent, a much more noticeable improvement in Red Robin's relative position becomes apparent.

This same pattern can be seen in the Food Quality attribute. In the Service attribute it may appear that Red Robin had a lower performance in 2012, yet in comparison to the competi-

tive set, the casual-dining brand actually improved by a slight degree.

If you would like to make a similar comparison of your brand, WD Partners has created a blank Excel file that you can download. It is available at: www.wdpartners.com/lombardi/downloads.php.

Finally, when reviewing this survey data, please keep any one brand's set of attribute ratings in perspective with the brand's positioning and historic offer. For example, In-N-Out Burger scores somewhat lower for Menu Variety, but a limited menu is part of that brand's positioning strategy and needs to be taken into account.

Likewise, when looking at the Atmosphere attribute ratings for Papa Murphy's Take 'N' Bake Pizza, it is good to keep in mind this is a takeout-only brand where there is very little time spent inside the store, making the Atmosphere attribute less critical.

As with any other data, the more the user understands the correct interpretation of the results, the more value the data provides. ■

Comparison example

The below model demonstrates the method for best comparing a chain's 2012 attribute scores with its 2011 scores using the relative difference between the subject brand's scores and the average scores of an identical group of competitors.



2011 attribute scores

	OVERALL SCORE	FOOD QUALITY	SERVICE
COMPETITIVE SET			
Cheddar's	73.2%	80.1%	63.1%
Chili's Grill & Bar	64.9	69.0	68.0
Applebee's	62.1	68.4	68.6
T.G.I. Friday's	61.1	67.2	63.0
Ruby Tuesday	58.1	65.0	62.8
COMPETITORS' AVERAGE SCORE	63.9	69.9	65.1
RED ROBIN GOURMET BURGERS	66.5	78.6	72.0
2011 NET DIFFERENCE	2.6	8.7	6.9

2012 attribute scores

	OVERALL SCORE	FOOD QUALITY	SERVICE
COMPETITIVE SET			
Cheddar's	63.7%	70.9%	59.3%
Chili's Grill & Bar	61.4	67.5	63.9
Applebee's	61.0	65.8	61.3
T.G.I. Friday's	62.4	66.9	65.2
Ruby Tuesday	58.5	67.6	61.6
COMPETITORS' AVERAGE SCORE	61.4	67.7	62.3
RED ROBIN GOURMET BURGERS	66.6	78.9	69.4
2012 NET DIFFERENCE	5.2	11.2	7.1
CHANGE IN NET DIFFERENCE SCORES (2012-2011)	2.6	2.5	0.2

While it may seem that Red Robin Gourmet Burgers' Service score declined from last year, this model comparing the score against a group average shows it actually increased slightly.

Methodology

The Consumer Picks survey was developed by WD Partners' Consumer Insights group to provide relative benchmark ratings on major attributes across restaurant brands.

Respondents, who participated online, were given a list of 171 restaurant chains organized into groups depending on service model and the respondent's geographic location.

They were asked:

- To identify which restaurants they had patronized in the last six months, or since Dec. 15, 2011. This time frame increased the likelihood of reasonable recall and ensured that respondents would represent a broader range of consumers and not just a brand's frequent users.

- How many times they visited a brand during that time period: one to two, or three or more times.

- To rate their experiences for up to eight of the restaurants they had patronized in the last six months.

Responses were scrubbed for inconsistent answers; straight lining, or selecting the same response repeatedly; and excessive haste in

completing the questionnaire. This reduced the number of acceptable responses to 5,346 from 6,328.

Accepted respondents reported approximately 130,000 restaurant visits over the last six months, which resulted in more than 41,000 restaurant ratings of the 171 restaurant chains.

Nineteen of the 171 restaurants had fewer than 100 ratings and are not included in this report. The remaining 152 restaurant chains yielded 40,782 ratings.

Twenty of the 152 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. Consequently, 132 chains were rated by at least 150 respondents, with 101 of them rated by more than 200 respondents.

WD Partners 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, based on a standard five-box scale. Overall Scores are a weighted

average of attribute scores as calculated using their respective customer-reported importance ratings.

The survey addresses 10 attributes: Atmosphere, Cleanliness, Craveability, Food Quality, Likely to Recommend, Likely 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.

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 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.

The industry's most robust look at the largest players in foodservice



Nation's Restaurant News' annual Top 200 special report includes three-year data sets of performance metrics, including U.S. system sales, units and estimated sales per unit. It takes a look at corporate mergers and acquisitions that shift billions of dollars of revenue and segment analysis covering casual dining, quick service, beverage-snack providers and family dining, among others.

ONLINE EXCLUSIVE CONTENT:

- Interview with Project Leader Alan J. Liddle
- Profiles of Top 5 fastest growing chains
- Top 200 Methodology
- Frequently Asked Questions
- and much more!

To get all this info, visit:
www.nrn.com/nrn-top-100

Get downloadable versions of NRN's Top 200 Special Report



NRN Top 100 Report 2012 (PDF) - *available now*
NRN Second 100 Report 2012 (PDF) - *available now*
NRN Top 200 Datafiles 2012 (Excel) - *coming soon*

Purchase them at
<http://bit.ly/nrntop200>

Diversity of desires

BY LISA JENNINGS

This issue marks the second year of Consumer Picks, an industry-wide survey reflecting how customers rate select restaurant chains. Because of the success of last year's survey, we were encouraged to make this year's review bigger and better.

The 2012 survey has attribute ratings on 152 chains, up from 139 chains in 2011. This year we also added an extra attribute, Craveability, to measure if a chain has menu items people crave.

In addition, this year we created a separate category for Fine Dining. While this segment only includes two chains represented in the survey, it will be easier to read and review the Casual-Dining segment without having to mentally "subtract" the Fine-Dining brands. Of course, we hope to grow the number of brands included in that segment in the 2013 Consumer Picks.

This year we are also including importance ratings for Limited Service, Family Dining and Casual. It is interesting to note that the importance attributes increase as check averages increase between each of these segments. Consumers are clear that if they are paying more, they will expect more across the attribute spectrum.

These changes aside, much of the survey is consistent in format to the 2011 report in order to facilitate year-to-year comparisons. These assessments will undoubtedly be a common use of the data. As such, I would like to offer a few suggestions and warnings.

First, a warning: If you look at just the difference in a brand's scores from 2011 to 2012, you run the risk of drawing incorrect conclusions. To look only at one year over the other for any one brand does not take into account the time difference between the research or the economic and social factors that took place during the year, impacting consumers' responses.

A better way to make the comparison is to take one brand's score against the average score for an identical group of competitors, comparing the relative difference

between the subject brand and its group of rivals. Directly comparing how the subject brand is doing against a competitive set allows for more insightful evaluations.

In the example provided below, we use Red Robin Gourmet Burgers as the subject brand. To make the comparison, five competitors were chosen. I would recommend using a minimum of five competitors as the basis for comparison, although you can use more.

Looking at Red Robin's Overall Score in isolation shows almost no change — 66.5 percent in 2011 versus 66.6 percent in 2012. But when you look at these scores against the competitive set, where the average score dropped from 63.9 percent to 61.4 percent, a much more noticeable improvement in Red Robin's relative position becomes apparent.

This same pattern can be seen in the Food Quality attribute. In the

Service attribute it may appear that Red Robin had a lower performance in 2012, yet in comparison to the competitive set, the casual-dining brand actually improved by a slight degree.

If you would like to make a similar comparison of your brand, WD Partners has created a blank Excel file that you can download. It is available at: www.wdpartners.com/lombardi/downloads.php.

Finally, when reviewing this survey data, please keep any one brand's set of attribute ratings in perspective with the brand's positioning and historic offer. For example, In-N-Out Burger scores somewhat lower for Menu Variety, but a limited menu is part of that brand's positioning strategy and needs to be taken into account.

Likewise, when looking at the Atmosphere attribute ratings for Papa Murphy's Take 'N' Bake Pizza, it is good to keep in mind this is a takeout-only brand where there is very little time spent inside the store, making the Atmosphere attribute less critical.

As with any other data, the more the user understands the correct interpretation of the results, the more value the data provides. ■



Consumer Picks newcomer Marble Slab Creamery took the top spot in this year's survey.

DAN MOURFIE/NEWSCOM

Marble Slab Creamery

NUMBER OF UNITS: 250*

U.S. SYSTEMWIDE SALES: \$66.5 million*

SURVEY STRENGTHS: Cleanliness, Menu Variety, Atmosphere, Craveability

LAST YEAR'S RANK: N/A

RECENT NEWS: opened first location in Saudi Arabia, plans to merge with Maggie Moo's Ice Cream and Treatory under a redesigned Marble Slab brand



1st

Papa Murphy's Take 'N' Bake Pizza

NUMBER OF UNITS: 1,283

U.S. SYSTEMWIDE SALES: \$695.9 million

SURVEY STRENGTHS: Value, Cleanliness, Reputation, Likely to Recommend, Likely to Return

LAST YEAR'S RANK: 1

RECENT NEWS: named Ken Calwell president, CEO; celebrated 30th anniversary; launched "Take 'N' Bake Revolution" ad campaign focused on customization



2nd

In-N-Out Burger

NUMBER OF UNITS: 266

U.S. SYSTEMWIDE SALES: \$596 million

SURVEY STRENGTHS: Value, Service, Reputation, Craveability

LAST YEAR'S RANK: 2

RECENT NEWS: expanded east of Arizona for first time with opening of units in Frisco and Allen, Texas



3rd

Ben & Jerry's

NUMBER OF UNITS: 298*

U.S. SYSTEMWIDE SALES: \$103 million*

SURVEY STRENGTHS: Reputation, Food Quality, Craveability

LAST YEAR'S RANK: 3

RECENT NEWS: introduced new Greek frozen yogurt flavors

RICHARD B. LEVINE/NEWSCOM



4th

Chick-fil-A

NUMBER OF UNITS: 1,592

U.S. SYSTEMWIDE SALES: \$3.99 billion

SURVEY STRENGTHS: Food Quality, Cleanliness, Service, Reputation

LAST YEAR'S RANK: 7

RECENT NEWS: promoted four senior vice presidents to executive vice presidents, planned 92 restaurant openings in 2012, set goal of \$10 billion in systemwide sales before 2020



5th

NOTE: ALL FIGURES TAKEN FROM NATION'S RESTAURANT NEWS TOP 200 RESEARCH UNLESS OTHERWISE NOTED
*SOURCE: TECHNOMIC TOP 500

Giving them what they want

Top scorers in each survey category in order of importance to diners

	1	2	3
FOOD QUALITY	COLD STONE CREAMERY	MARBLE SLAB CREAMERY**	IN-N-OUT BURGER
CLEANLINESS	MARBLE SLAB CREAMERY**	PAPA MURPHY'S TAKE 'N' BAKE PIZZA	CORNER BAKERY CAFE**
VALUE	PAPA MURPHY'S TAKE 'N' BAKE PIZZA	CICI'S PIZZA	LITTLE CAESARS PIZZA
SERVICE	IN-N-OUT BURGER	CHICK-FIL-A	CULVER'S
CRAVEABILITY	MARBLE SLAB CREAMERY**	BEN & JERRY	KRISPY KREME DOUGHNUTS
MENU VARIETY	GOLDEN CORRAL	MARBLE SLAB CREAMERY**	HOMETOWN BUFFET
REPUTATION	IN-N-OUT BURGER	BEN & JERRY	COLD STONE CREAMERY
ATMOSPHERE	MARBLE SLAB CREAMERY**	PANERA BREAD	STARBUCKS COFFEE
LIKELY TO RECOMMEND	PAPA MURPHY'S TAKE 'N' BAKE PIZZA	IN-N-OUT BURGER	HÄAGEN-DAZS

**100-149 RESPONSES

Who likes what?

Top-scoring Limited-Service chain among each group

CATEGORY	CHAIN
WOMEN	MARBLE SLAB CREAMERY**
MEN	POTBELLY SANDWICH WORKS**
MILLENNIALS	IN-N-OUT BURGER
GEN X	MARBLE SLAB CREAMERY**
BOOMERS	MARBLE SLAB CREAMERY**
MATURES	PAPA MURPHY'S TAKE 'N' BAKE PIZZA
INCOME	
<\$25K	SOUPLANTATION/SWEET TOMATOES
\$25K-\$49,999K	MARBLE SLAB CREAMERY**
\$50K-\$74,999K	IN-N-OUT BURGER
\$75K-\$100K	PAPA MURPHY'S TAKE 'N' BAKE PIZZA
>\$100K	BRUSTER'S REAL ICE CREAM

**100-149 RESPONSES

KEY FINDING: The attributes consumers consider most important among Limited-Service brands are Food Quality, a brand's Reputation and Cleanliness.



TOP 10

Likely to Return

1	Papa Murphy's Take 'N' Bake Pizza	79.2%
2	Rita's Ice	74.2
3	Chick-fil-A	73.0
4	Whataburger	72.8
5	In-N-Out Burger	72.6
6	Braum's Ice Cream & Dairy Stores**	71.2
7	Häagen-Dazs	70.0
8	Wingstop	69.1
9	Dunkin' Donuts	69.0
10	Subway	68.8

**100-149 RESPONSES

RANK	CHAIN	SCORE*
1	MARBLE SLAB CREAMERY**	73.3%
2	PAPA MURPHY'S TAKE 'N' BAKE PIZZA	72.1
3	IN-N-OUT BURGER	70.9
4	BEN & JERRY'S	68.7
5	CHICK-FIL-A	67.3
6	HÄAGEN-DAZS	67.2
7	COLD STONE CREAMERY	67.1
8	BRUSTER'S REAL ICE CREAM**	66.7
8	FIREHOUSE SUBS	66.7
10	CULVER'S	66.1
11	PANERA BREAD	65.2
12	KRISPY KREME DOUGHNUTS	64.3
13	CORNER BAKERY CAFE**	63.8
14	JASON'S DELI	63.3
15	SOUPLANTATION/SWEET TOMATOES	62.7
16	PEI WEI ASIAN DINER	62.6
17	FUDDRUCKERS	61.7
18	BASKIN-ROBBINS	60.9
19	ZAXBY'S	60.4
20	SMOOTHIE KING	59.9
21	McALISTER'S DELI	59.8
22	RITA'S ICE	59.7
23	FIVE GUYS BURGERS AND FRIES	59.6
24	CHIPOTLE MEXICAN GRILL	59.4
24	MRS. FIELDS COOKIES	59.4
26	JET'S PIZZA**	59.3
26	POTBELLY SANDWICH WORKS**	59.3
28	BAJA FRESH MEXICAN GRILL	59.2
28	GOLDEN CORRAL	59.2
30	MOE'S SOUTHWEST GRILL	58.9
31	JAMBA JUICE	57.7
32	SCHLOTZSKY'S DELI	57.4
33	STARBUCKS COFFEE	56.8
34	EINSTEIN BROS BAGELS	56.6
35	BRäum'S ICE CREAM & DAIRY STORES**	56.1
36	CARVEL	55.8
37	BOSTON MARKET	55.4
38	CHARLEY'S GRILLED SUBS**	55.3
39	BRUEGGER'S BAGEL BAKERY	54.8
39	PIZZA INN**	54.8
41	SUBWAY	54.7
41	WINGSTOP	54.7
43	CARIBOU COFFEE	54.6
43	NOODLES & COMPANY	54.6
45	JIMMY JOHN'S	54.0
45	WHATABURGER	54.0
47	CINNABON	53.5
48	PONDEROSA/BONANZA STEAKHOUSE	52.9
48	ROUND TABLE PIZZA**	52.9
50	PANDA EXPRESS	52.7
51	QDOBA MEXICAN GRILL	52.5
52	TIM HORTONS	52.2
53	SIZZLER	52.0
54	PAPA JOHN'S PIZZA	51.8
55	JERSEY MIKE'S	51.2
56	AU BON PAIN**	51.1
56	EL POLLO LOCO	51.1
56	GODFATHER'S PIZZA**	51.1
59	RYAN'S	49.8
60	AUNTIE ANNE'S PRETZELS	49.6
61	HOMETOWN BUFFET	49.5
62	OLD COUNTRY BUFFET	49.3
63	BOJANGLES' FAMOUS CHICKEN 'N BISCUITS	48.8
63	SONIC, AMERICA'S DRIVE-IN	48.8
65	PIZZA HUT	48.4
66	QUINOS	48.2
67	BLIMPIE	47.8
68	CICI'S PIZZA	47.4
69	DUNKIN' DONUTS	47.1
70	HUNGRY HOWIE'S PIZZA	47.0
70	POPEYES LOUISIANA KITCHEN	47.0
70	WENDY'S	47.0
73	FAZOLI'S	45.8
74	CAPTAIN D'S	45.6
75	DOMINO'S PIZZA	45.5
76	DAIRY QUEEN	45.3
77	CARL'S JR.	45.1
78	TACO JOHN'S**	45.0
79	ARBY'S	44.9
79	DEL TACO	44.9
79	WHITE CASTLE	44.9
82	KRYSTAL	43.3
82	LONG JOHN SILVER'S	43.3
84	JACK IN THE BOX	42.8
85	HARDEE'S	42.7
86	KFC	42.4
86	LITTLE CAESARS PIZZA	42.4
88	CHECKERS DRIVE-IN	41.7
89	TACO BELL	41.2
90	ORANGE JULIUS	40.6
90	RALLY'S HAMBURGERS	40.6
92	A&W RESTAURANTS	40.5
93	WIENERSCHNITZEL	39.9
94	SBARRO	39.5
95	BURGER KING	38.1
95	MCDONALD'S	38.1
97	CHURCH'S CHICKEN	37.5
98	CHUCK E. CHEESE'S	36.4

*WEIGHTED BY ATTRIBUTE IMPORTANCE **100-149 RESPONSES

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



Asian/Noodles

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
PEI WEI ASIAN DINER	62.6%	75.2%	47.6%	72.8%	58.1%	53.1%	57.4%	57.2%	61.5%	72.7%	62.6%
NOODLES & COMPANY	54.6	71.8	39.2	62.4	60.9	41.1	52.6	41.6	50.9	61.6	53.1
PANDA EXPRESS	52.7	58.4	50.8	52.5	52.3	50.8	49.2	39.3	56.3	55.6	55.1

Bakery/Cafe

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
PANERA BREAD	65.2%	83.5%	35.3%	71.6%	63.6%	64.0%	76.5%	64.0%	56.9%	66.7%	66.7%
CORNER BAKERY CAFE**	63.8	74.0	47.8	77.1	60.9	61.6	67.4	60.6	50.0	65.5	64.9
EINSTEIN BROS BAGELS	56.6	72.4	40.1	64.8	60.0	45.9	59.9	40.1	52.5	62.1	59.6
BRUEGGER'S BAGEL BAKERY	54.8	66.7	40.8	60.3	57.1	42.6	63.6	45.5	46.5	67.9	66.3
AU BON PAIN**	51.1	69.5	38.5	61.7	42.6	45.7	50.9	39.8	43.1	52.0	49.9

Beverage/Snack

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
KRISPY KREME DOUGHNUTS	64.3%	74.5%	51.1%	63.1%	61.1%	48.4%	73.2%	54.5%	76.3%	74.3%	64.3%
SMOOTHIE KING	59.9	65.8	39.8	72.8	59.9	60.0	56.8	48.4	60.7	67.1	66.0
MRS. FIELDS COOKIES	59.4	76.2	41.4	60.6	54.9	44.7	68.2	45.4	71.9	69.8	57.1
JAMBA JUICE	57.7	70.9	33.8	64.0	59.4	54.6	64.6	46.8	55.1	63.3	63.5
STARBUCKS COFFEE	56.8	58.7	21.9	67.3	66.8	39.6	73.5	63.5	58.5	59.2	65.4
CARIBOU COFFEE	54.6	56.0	30.6	71.6	64.7	38.9	59.8	56.3	51.6	58.6	59.5
CINNABON	53.5	69.2	38.3	55.5	47.2	27.0	66.2	37.2	72.3	62.5	49.0
TIM HORTONS	52.2	56.0	44.8	64.4	53.8	39.1	60.0	39.1	46.1	63.5	64.7
AUNTIE ANNE'S PRETZELS	49.6	65.0	33.9	51.3	48.8	30.3	56.3	29.8	64.1	60.2	55.1
DUNKIN' DONUTS	47.1	50.0	43.0	46.9	43.4	34.4	61.7	29.8	51.1	61.3	69.0
ORANGE JULIUS	40.6	48.9	33.6	39.2	39.1	32.1	40.4	29.5	48.4	53.7	46.2

Last year's No. 2, Krispy Kreme Doughnuts, slipped into first place this year, scoring high on Value, Craveability and Likely to Recommend. Jamba Juice lost its first-place position from last year and sank to No. 4 in the Overall Score despite ongoing efforts to improve the menu with new food offerings, frozen yogurt and more healthful smoothies. Mrs. Fields Cookies took the top score for Food Quality this year. Meanwhile, although Starbucks was rated highest for Service, Reputation and Atmosphere, the coffeehouse giant was hampered by low scores for Value and Menu Variety. Dunkin' Donuts also sank in the rankings, moving from No. 8 last year to No. 10 this year despite winning the top score for Likely to Return. At the bottom once again: Orange Julius, with below-average scores on all attributes.



Buffet/Steak

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
SOULPLANTATION/SWEET TOMATOES	62.7%	76.3%	56.2%	68.9%	50.1%	63.3%	63.0%	49.4%	60.8%	68.6%	64.7%
GOLDEN CORRAL	59.2	58.8	62.7	51.6	50.4	80.7	61.1	42.0	52.9	72.9	63.4
PONDEROSA/BONANZA STEAKHOUSE	52.9	52.3	59.2	55.7	52.5	60.8	44.5	40.7	48.1	58.2	54.7
SIZZLER	52.0	56.2	52.1	52.6	52.5	57.6	49.1	35.1	51.8	55.4	56.0
RYAN'S	49.8	48.3	53.0	43.3	47.2	66.5	46.6	41.3	45.0	56.7	46.8
HOMETOWN BUFFET	49.5	44.8	58.9	44.6	39.7	69.4	48.6	36.9	44.6	59.5	56.5
OLD COUNTRY BUFFET	49.3	43.9	62.9	46.7	42.9	66.8	43.9	34.3	41.4	56.4	50.9

Chicken

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CHICK-FIL-A	67.3%	80.3%	52.0%	74.6%	75.1%	47.3%	75.6%	56.2%	66.3%	71.5%	73.0%
ZAXBY'S	60.4	75.5	42.1	69.0	54.2	46.6	62.8	55.1	61.4	70.5	68.4
BOSTON MARKET	55.4	64.1	46.9	63.2	55.1	48.9	58.7	40.0	49.5	57.3	60.8
WINGSTOP	54.7	67.6	46.9	51.2	48.1	41.3	57.3	44.4	64.7	68.8	69.1
EL POLLO LOCO	51.1	68.5	55.3	51.3	43.3	39.3	53.1	30.6	49.5	57.4	57.8
BOJANGLES' FAMOUS CHICKEN 'N BISCUITS	48.8	60.6	53.0	45.2	43.8	36.0	49.0	32.2	51.7	58.1	62.6
POPEYES LOUISIANA KITCHEN	47.0	62.8	48.6	39.1	36.2	38.4	51.8	29.3	55.6	58.7	60.2
KFC	42.4	53.1	39.3	38.4	37.8	35.1	48.2	24.8	50.1	49.3	55.1
CHURCH'S CHICKEN	37.5	44.9	48.9	30.2	35.6	28.3	36.3	21.3	40.7	48.4	48.3

Frozen Treats

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
MARBLE SLAB CREAMERY**	73.3%	84.9%	41.7%	82.0%	69.1%	73.9%	77.8%	68.6%	79.9%	75.9%	67.4%
BEN & JERRY'S	68.7	82.3	43.4	64.8	67.2	66.5	82.4	59.7	78.4	72.6	65.3
HÄAGEN-DAZS	67.2	80.7	43.0	71.5	65.7	60.2	75.0	54.6	72.8	76.3	70.0
COLD STONE CREAMERY	67.1	86.8	32.1	71.2	70.5	65.4	78.0	55.5	75.0	69.6	60.8
BRUSTER'S REAL ICE CREAM**	66.7	83.9	48.1	67.3	64.9	62.4	70.6	53.6	72.5	72.8	68.6
BASKIN-ROBBINS	60.9	75.0	35.7	59.8	59.0	58.5	67.2	48.4	70.6	71.1	67.6
RITA'S ICE	59.7	69.3	48.6	61.7	61.2	49.2	70.0	43.6	63.5	71.0	74.2
BRAUM'S ICE CREAM & DAIRY STORES**	56.1	68.8	48.8	55.2	50.6	48.1	60.8	38.9	58.7	70.2	71.2
CARVEL	55.8	63.6	42.2	52.6	55.6	47.3	61.8	43.2	65.2	65.9	66.6
DAIRY QUEEN	45.3	49.0	35.1	42.6	44.3	40.4	48.8	32.3	57.5	57.4	60.4

Chick-fil-A and Zaxby's held their two top-scoring positions this year as No. 1 and No. 2, respectively. Chick-fil-A swept all but two attributes: Menu Variety and Value. Boston Market held onto the highest rating for Menu Variety. The chain has spent the past two years revamping its menu and enhancing the guest experience with such moves as serving dine-in meals on real plates and using real silverware. El Pollo Loco won the top spot for Value, indicating that consumers are responding to promotions like the three-course family meal that serves four for \$20. Bringing up the rear for the second year in a row is Church's Chicken, which scored above average only on one attribute: Value.

Hamburger

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
IN-N-OUT BURGER	70.9%	84.1%	71.3%	73.6%	75.3%	33.2%	85.2%	54.6%	73.4%	79.2%	72.6%
CULVER'S	66.1	77.5	47.1	73.2	71.7	65.7	70.2	55.6	56.4	68.4	68.1
FUDDRUCKERS	61.7	73.1	48.7	64.2	57.8	52.9	63.4	58.9	60.5	68.5	60.6
FIVE GUYS BURGERS AND FRIES	59.6	78.8	43.4	58.9	61.0	35.3	74.3	46.7	64.1	70.6	62.1
WHATABURGER	54.0	65.4	49.7	48.2	52.9	41.3	61.2	35.7	58.8	66.4	72.8
SONIC, AMERICA'S DRIVE-IN	48.8	50.7	43.6	37.1	53.1	55.5	48.1	40.8	51.0	58.0	60.3
WENDY'S	47.0	55.9	49.8	46.6	40.3	46.1	48.0	28.7	42.9	55.0	61.6
CARL'S JR.	45.1	55.3	39.5	44.6	40.1	48.8	44.7	27.2	46.4	51.4	54.2
WHITE CASTLE	44.9	45.8	61.1	37.2	36.3	30.3	46.2	23.6	66.7	53.0	60.2
KRYSTAL	43.3	42.5	55.8	40.7	41.7	30.6	41.5	26.1	51.5	57.0	56.9
JACK IN THE BOX	42.8	43.1	54.7	36.5	37.8	54.6	38.0	24.8	41.4	48.3	58.0
HARDEE'S	42.7	50.6	38.1	43.6	42.8	39.9	37.3	28.0	41.0	55.5	58.7
CHECKERS DRIVE-IN	41.7	45.0	53.4	30.1	37.0	44.7	42.7	24.9	44.9	51.5	53.0
RALLY'S HAMBURGERS	40.6	42.9	56.5	30.4	35.4	40.0	35.1	22.0	47.2	53.7	55.2
A&W RESTAURANTS	40.5	44.5	37.0	39.4	42.0	37.3	40.5	31.4	41.7	43.9	40.5
BURGER KING	38.1	41.5	43.3	36.8	34.8	38.2	36.0	23.8	39.5	42.0	52.8
MCDONALD'S	38.1	28.0	53.3	37.6	32.8	39.4	45.1	23.3	35.0	44.4	62.8



For the second year, In-N-Out Burger won top ratings in seven out of 10 attributes, scoring much higher than its peers on Food Quality, Craveability and Reputation, in particular. Culver's once again snagged the top score for Menu Variety, and Whataburger came in No. 1 for Likely to Return – although In-N-Out Burger was only slightly behind. In a tie for lowest Overall Score were McDonald's and Burger King. McDonald's strongest attributes were Value and Likely to Return.



Mexican

Consumer perceptions of players in this category haven't changed much, and rankings were the same as last year, with fan-favorite Chipotle Mexican Grill claiming top scores in a respectable five out of 10 attributes. Consumers rated Chipotle's Food Quality, in particular, well above its peers. However, Baja Fresh Mexican Grill virtually tied Chipotle's Overall Score, improving its ratings in several categories this year. Consumers rated Baja Fresh the highest for Cleanliness and Atmosphere within the category. Although Taco Bell's popular Doritos Locos Tacos debuted weeks before the survey was conducted, the product launch didn't appear to improve the chain's scores. Taco Bell earned low scores across the board, except in Likely to Return, which beat out several other brands.

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CHIPOTLE MEXICAN GRILL	59.4%	76.2%	51.1%	63.6%	59.4%	38.3%	65.4%	47.6%	60.9%	68.0%	66.9%
BAJA FRESH MEXICAN GRILL	59.2	71.8	49.2	65.4	54.7	49.6	60.1	54.3	58.1	63.0	59.7
MOE'S SOUTHWEST GRILL	58.9	69.6	49.6	59.4	69.7	46.3	60.0	50.3	55.1	65.3	60.5
QDOBA MEXICAN GRILL	52.5	69.4	36.2	60.1	49.9	40.8	52.0	41.0	53.7	60.5	55.0
TACO JOHN'S**	45.0	50.1	51.7	40.0	37.2	40.9	40.0	28.2	49.8	53.0	65.3
DEL TACO	44.9	37.8	67.2	34.5	40.9	50.6	37.0	26.4	48.0	53.1	60.6
TACO BELL	41.2	34.3	61.4	34.0	36.0	42.4	35.9	23.7	48.0	49.2	62.0

Pizza/Italian

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
PAPA MURPHY'S TAKE 'N' BAKE PIZZA	72.1%	82.9%	80.5%	77.4%	71.2%	60.9%	76.3%	42.8%	63.6%	80.1%	79.2%
JET'S PIZZA**	59.3	76.3	55.3	52.9	60.2	53.9	63.0	39.1	60.3	67.6	63.7
PIZZA INN**	54.8	59.8	59.6	49.5	51.8	46.0	52.9	45.9	58.3	62.9	64.7
ROUND TABLE PIZZA**	52.9	70.0	38.3	50.2	50.2	46.6	58.8	40.4	55.9	60.5	58.6
PAPA JOHN'S PIZZA	51.8	65.0	53.6	47.2	51.3	40.6	57.0	33.4	54.7	56.9	57.9
GODFATHER'S PIZZA**	51.1	58.8	45.9	44.6	45.1	44.5	54.4	42.3	59.4	58.5	57.6
PIZZA HUT	48.4	56.8	46.6	45.0	46.1	38.8	52.3	37.6	51.8	57.7	61.8
CICI'S PIZZA	47.4	38.5	78.8	39.0	46.4	45.5	40.1	32.2	45.2	53.1	51.0
HUNGRY HOWIE'S PIZZA	47.0	58.5	56.6	43.6	44.1	33.8	42.1	28.5	48.3	59.4	60.3
FAZOLI'S	45.8	50.0	44.8	51.8	43.4	43.3	38.9	35.3	43.2	55.5	48.9
DOMINO'S PIZZA	45.5	50.3	49.9	42.3	46.8	41.5	45.4	27.7	48.4	53.9	56.3
LITTLE CAESARS PIZZA	42.4	35.3	76.1	39.4	44.4	20.0	41.1	23.9	40.8	54.3	58.1
SBARRO	39.5	49.0	33.6	41.6	37.4	33.7	37.3	29.0	45.8	42.9	38.1
CHUCK E. CHEESE'S	36.4	30.8	26.2	35.8	40.4	22.3	48.1	53.7	24.9	52.3	47.7

Sandwich

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
FIREHOUSE SUBS	66.7%	79.6%	48.2%	71.3%	69.1%	59.1%	71.5%	59.9%	65.4%	71.5%	68.4%
JASON'S DELI	63.3	76.3	44.5	68.3	56.8	68.4	72.8	46.7	55.7	73.9	68.0
McALISTER'S DELI	59.8	68.2	40.4	68.1	61.3	67.6	62.0	53.4	46.9	65.7	63.6
POTBELLY SANDWICH WORKS**	59.3	72.4	44.7	66.4	65.5	37.9	58.3	56.0	55.6	67.1	61.2
SCHLOTZSKY'S DELI	57.4	71.2	38.4	65.5	60.3	56.3	59.4	41.4	55.9	62.3	55.6
CHARLEY'S GRILLED SUBS**	55.3	69.4	48.3	56.9	59.9	49.6	47.5	43.2	59.1	59.3	58.8
SUBWAY	54.7	61.5	63.0	54.3	52.2	51.2	61.4	30.1	46.2	63.5	68.8
JIMMY JOHN'S	54.0	60.8	43.0	61.7	62.2	43.7	59.5	39.9	51.1	58.6	56.0
JERSEY MIKE'S	51.2	59.8	40.0	54.7	61.6	42.7	55.0	34.6	49.5	61.5	54.7
QUINZIOS	48.2	63.6	39.2	55.9	47.8	45.2	44.4	31.6	42.5	49.3	45.7
BLIMPIE	47.8	53.4	48.4	49.8	53.4	44.5	41.6	33.8	43.5	52.5	55.0
ARBY'S	44.9	55.1	36.2	46.7	40.4	43.0	47.1	32.0	46.2	52.1	51.5
WIENERSCHNITZEL	39.9	33.1	53.6	38.0	39.5	30.1	34.9	23.8	48.5	53.4	61.8



Firehouse Subs shook up the category, taking first place and earning top scores for five attributes, including Food Quality and Craveability. Jason's Deli, last year's No. 3, climbed to the No. 2 spot, pushing McAlister's Deli, last year's top sandwich brand, to third place. Jason's Deli took the top rating for Menu Variety, Reputation and Likely to Recommend. Subway held onto its top score for Value, but this year consumers also said they were Likely to Return. Wienerschnitzel earned the lowest scores again this year.

Seafood

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
CAPTAIN D'S	45.6%	54.2%	47.5%	41.4%	42.6%	43.8%	45.6%	31.7%	44.0%	55.5%	56.0%
LONG JOHN SILVER'S	43.3	52.1	39.9	38.6	39.6	39.0	41.6	29.2	50.8	55.1	55.0

*WEIGHTED BY ATTRIBUTE IMPORTANCE **100-149 RESPONSES

Quality counts

BY MARK BRANDAU

It may not shock casual-dining operators that customers choose to visit them for their food quality, cleanliness and menu variety, but they may be surprised to learn that having a reputation for value doesn't cinch their status as a consumer favorite either.

Consider The Cheesecake Factory, which emerged as the most preferred Casual-Dining brand in the Varied-Menu subcategory despite tying for the lowest rating for Value. Although the chain fell short on Value, it nearly swept the rest

highest Value score of 43.6 percent.

With its top Value score in the Italian/Pizza subcategory, Olive Garden beat out Carrabba's Italian Grill for the top Overall Score in the subsegment, despite Carrabba's having the highest rating for Food Quality.

Price-value propositions do tend to correlate with consumers' intent to return to a particular brand, however, which likely says more about consumers' price sensitivity than a restaurant's ability to be a customer favorite.

In the Varied-Menu subsegment, the chains with the top-two Likely to Return scores — in order, Sonny's Real Pit Bar-B-Q and Cheddar's — had the No. 3 and No. 1 Value scores, respectively. But Cheddar's Overall Score of 63.7 percent rose barely above the subcategory average of 63.4 percent, and Sonny's was second-to-last overall with a 55.6-percent score.

The more specialized subsegments became, the more brands were rewarded for Menu Variety. In Italian/Pizza, Seafood and Steak, the respective overall subsegment winners Olive Garden, Bonefish Grill and Texas Roadhouse also received the top attribute ratings for Menu Variety — just like The Cheesecake Factory.

Coincidentally, Carrabba's, Red Lobster and Outback finished second in those subsegments, both in terms of Menu Variety rating and Overall Scores.

Other top-performing brands scored high on Food Quality, which not surprisingly tracked closely to their ratings for Craveability. Such examples included P.F. Chang's China Bistro, LongHorn Steakhouse, Famous Dave's and Mellow Mushroom Pizza Bakers, one of three new brands to join the Casual category in 2012.

Some chains owed their success in overall ratings to being very good at one particular thing, thus propelling them above a middling performance stemming from average rankings for most attributes.

BJ's Restaurant & Brewhouse, for example, rose to the fourth-highest Overall Score on the strength of its No. 2 rating for Menu Variety — despite not getting particularly high ratings for Craveability or Value.

Likewise, Hard Rock Cafe and Buca di Beppo landed in the top portion of their subsegment scores by having the top rankings for Atmosphere, even though consumers rated them as lacking in Menu Variety and Cleanliness. ■



Cheddar's scored the top position in its subsegment for Value but had an Overall Score that barely beat the subsegment's average.

of the survey's attribute ratings, netting the top considerations for Food Quality, Cleanliness, Menu Variety, Reputation, Craveability and Likely to Recommend.

Interestingly, the brand that tied as having the lowest perceived Value in the Varied-Menu subsegment, Buffalo Wild Wings, has not seen its same-store sales or unit growth suffer in the past several years. Buffalo Wild Wings finished near the bottom in overall preference rankings, however, illustrating that repeat traffic and sales growth can occur even if a brand is not ranked as a favored choice among its competitors.

Value did more to distinguish niche brands from their competitors in specialized segments, as in the case of Texas Roadhouse. The Steak subsegment had the least disparity in overall preference scores between the leader, Texas Roadhouse, and the bottom finisher, Lone Star Steakhouse.

But Texas Roadhouse's significant lead in the Value rating, finishing with a 54.8 percent rating, compared with the next-closest result of 47.1 percent for Logan's Roadhouse, helped push Texas Roadhouse to the top in a tight race with No. 2 Overall Scorer Outback Steakhouse, which had the third-

The Cheesecake Factory

NUMBER OF UNITS: 156
U.S. SYSTEMWIDE SALES: \$1.55 billion
SURVEY STRENGTHS: Food Quality, Cleanliness, Menu Variety, Reputation
LAST YEAR'S RANK: 4
RECENT NEWS: debuted SkinnyLicious line of low-calorie items, exploring overseas growth, honored at MenuMasters



P.F. Chang's China Bistro

NUMBER OF UNITS: 206
U.S. SYSTEMWIDE SALES: \$930.4 million
SURVEY STRENGTHS: Food Quality, Cleanliness, Service
LAST YEAR'S RANK: 3
RECENT NEWS: purchased by Centerbridge Partners LP in \$1.1 billion deal, debuted fast-casual concept Pei Wei Asian Market



Bonefish Grill

NUMBER OF UNITS: 158
U.S. SYSTEMWIDE SALES: \$459 million
SURVEY STRENGTHS: Food Quality, Cleanliness, Reputation
LAST YEAR'S RANK: 2
RECENT NEWS: parent company planning initial public offering, president John Cooper being honored with 2012 Golden Chain Award



PR NEWSFOTO/NEWSCOM

Olive Garden

NUMBER OF UNITS: 784
U.S. SYSTEMWIDE SALES: \$3.59 billion
SURVEY STRENGTHS: Value, Menu Variety, Reputation
LAST YEAR'S RANK: 8
RECENT NEWS: emphasizing value-based promotions, including 2 for \$25 dinner and \$6.95 Create Your Own Lunch options; introduced branded salad dressing in retail outlets



Carrabba's Italian Grill

NUMBER OF UNITS: 232
U.S. SYSTEMWIDE SALES: \$686 million
SURVEY STRENGTHS: Food Quality, Service
LAST YEAR'S RANK: 5
RECENT NEWS: featuring seasonal hand-prepared specials, with most dishes made from scratch in restaurants



MAURICE RIVENBARK/NEWSCOM

NOTE: ALL FIGURES TAKEN FROM NATION'S RESTAURANT NEWS TOP 200 RESEARCH UNLESS OTHERWISE NOTED

Giving them what they want

Top scorers in each survey category in order of importance to diners

	1	2	3
FOOD QUALITY	BONEFISH GRILL	THE CHEESECAKE FACTORY	CARRABBA'S ITALIAN GRILL
CLEANLINESS	BONEFISH GRILL	THE CHEESECAKE FACTORY	BJ'S RESTAURANT & BREWHOUSE
VALUE	BONEFISH GRILL	CARRABBA'S ITALIAN GRILL	P.F. CHANG'S CHINA BISTRO
SERVICE	CHEDDAR'S	TEXAS ROADHOUSE	NINETY NINE RESTAURANTS**
 CRAVEABILITY	THE CHEESECAKE FACTORY	BJ'S RESTAURANT & BREWHOUSE	P.F. CHANG'S CHINA BISTRO
MENU VARIETY	HARD ROCK CAFE	P.F. CHANG'S CHINA BISTRO	DAVE & BUSTER'S
REPUTATION	THE CHEESECAKE FACTORY	P.F. CHANG'S CHINA BISTRO	RED LOSTER
ATMOSPHERE	THE CHEESECAKE FACTORY	P.F. CHANG'S CHINA BISTRO	BONEFISH GRILL
LIKELY TO RECOMMEND	THE CHEESECAKE FACTORY	FAMOUS DAVE'S	MELLOW MUSHROOM PIZZA BAKERS**

**100-149 RESPONSES

Overall Scores (Casual)

RANK	CHAIN	SCORE*
1	THE CHEESECAKE FACTORY	75.8%
2	P.F. CHANG'S CHINA BISTRO	74.0
3	BONEFISH GRILL	73.9
4	OLIVE GARDEN	72.2
5	CARRABBA'S ITALIAN GRILL	71.4
6	MIMI'S CAFE	69.9
7	TEXAS ROADHOUSE	69.5
8	OUTBACK STEAKHOUSE	69.2
9	RED LOBSTER	69.1
10	BUCA DI BEPPO	69.0
11	MELLOW MUSHROOM PIZZA BAKERS**	68.8
12	BJ'S RESTAURANT & BREWHOUSE	68.7
13	LONGHORN STEAKHOUSE	68.1
14	CALIFORNIA PIZZA KITCHEN	67.9
14	ROMANO'S MACARONI GRILL	67.9
16	HARD ROCK CAFE	67.3
17	RED ROBIN GOURMET BURGERS	66.6
18	FAMOUS DAVE'S	66.1
19	SMOKEY BONES BAR & FIRE GRILL	64.9
20	O'CHARLEY'S	64.2
21	CHEDDAR'S	63.7
22	JOE'S CRAB SHACK	63.1
23	UNO CHICAGO GRILL/PIZZERIA UNO	62.8
24	T.G.I. FRIDAY'S	62.4
25	NINETY NINE RESTAURANTS**	62.3
26	CHILI'S GRILL & BAR	61.4
27	APPLEBEE'S	61.0
28	LOGAN'S ROADHOUSE	60.7
29	LONE STAR STEAKHOUSE	60.3
30	CARINO'S ITALIAN**	60.2
30	ON THE BORDER MEXICAN GRILL & CANTINA	60.2
32	CHEVYS FRESH MEX**	60.1
33	DAVE & BUSTER'S	59.2
34	HOOTERS	58.6
35	RUBY TUESDAY	58.5
36	BUFFALO WILD WINGS	58.1
37	SONNY'S REAL PIT BAR-B-Q**	55.6
38	JOHNNY ROCKETS	51.6

*WEIGHTED BY ATTRIBUTE IMPORTANCE **100-149 RESPONSES

Who likes what?

Top-scoring Casual chain among each group

CATEGORY	CHAIN
WOMEN	THE CHEESECAKE FACTORY
MEN	P.F. CHANG'S CHINA BISTRO
MILLENNIALS	BONEFISH GRILL
GEN X	P.F. CHANG'S CHINA BISTRO
BOOMERS	BJ'S RESTAURANT & BREWHOUSE
MATURES	THE CHEESECAKE FACTORY
INCOME	
<\$25K	THE CHEESECAKE FACTORY
\$25K-\$49,999K	THE CHEESECAKE FACTORY
\$50K-\$74,999K	BJ'S RESTAURANT & BREWHOUSE
\$75K-\$100K	BUCCA DI BEPPO
>\$100K	MELLOW MUSHROOM PIZZA BAKERS**



**100-149 RESPONSES



ZUMA PRESS/NEWSCOM

TOP 10 Likely to Return

1	Mellow Mushroom Pizza Bakers**	68.8%
2	Olive Garden	68.4
3	Red Lobster	67.0
4	Sonny's Real Pit Bar-B-Q**	66.3
5	Cheddar's	64.9
6	Chili's Grill & Bar	64.7
7	Outback Steakhouse	64.4
8	O'Charley's	64.2
9	Applebee's	63.5
10	Famous Dave's	63.3

**100-149 RESPONSES

Fine Dining

In the newly created Fine-Dining category, Ruth's Chris Steak House, based in Heathrow, Fla., and McCormick & Schmick's in Houston — both of which performed well in 2011 as part of the Casual category — once again gave a strong showing.

In terms of Overall Score, high-end steak brand Ruth's Chris achieved a first-place ranking of 78.6 percent, followed by seafood purveyor McCormick & Schmick's at 76.3 percent. As expected, the two Fine-Dining chains also scored high in Food Quality, with ratings of 93.6 percent and 86.8 percent, respectively. But while the 120-plus-unit Ruth's Chris remained statistically flat versus last year's food rating of 93.8 percent, McCormick & Schmick's climbed more than seven points from 79.7 percent in 2011.

Chris Westcott, divisional vice president for McCormick & Schmick's, attributed the rise to the 80-unit seafood chain's current initiative to improve its fare, which has been underway since last year. In 2011 officials reviewed the brand's core items — which represent about 70 percent of orders — updating and refining a number of recipes.

The two Fine-Dining chains also tended to perform well in other areas. The Service ratings for both were nearly identical, with Ruth's Chris scoring 83.0 percent and McCormick & Schmick's tallying 83.3 percent; meanwhile, Atmosphere was 81.7 percent and 84.5 percent, respectively. Menu Variety ratings also ran neck and neck, with Ruth's Chris registering 71.2 percent and McCormick & Schmick's 70.9 percent. However, a larger point spread could be found when measuring Craveability, with Ruth's Chris and McCormick & Schmick's scoring 75.1 percent and 63.8 percent, respectively — a possible indication that a great high-end steak-and-potatoes dinner remains a true aspirational meal for American diners.

— Paul Frumkin

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

Italian/Pizza

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
OLIVE GARDEN	72.2%	80.9%	49.1%	78.4%	73.3%	71.2%	77.3%	72.1%	66.7%	72.8%	68.4%
CARRABBA'S ITALIAN GRILL	71.4	83.0	43.5	78.5	77.3	69.0	74.4	70.6	66.0	71.4	59.7
BUCA DI BEPPO	69.0	82.0	46.0	70.1	73.1	64.5	68.3	74.9	59.2	72.6	52.6
MELLOW MUSHROOM PIZZA BAKERS**	68.8	82.7	38.3	73.8	63.6	64.2	76.0	73.6	67.6	75.5	68.8
ROMANO'S MACARONI GRILL	67.9	79.5	36.1	79.6	75.2	64.8	69.6	71.3	55.8	66.5	53.3
UNO CHICAGO GRILL/PIZZERIA UNO	62.8	71.5	44.1	67.0	60.8	58.2	68.3	61.7	57.5	70.9	62.2
CARINO'S ITALIAN**	60.2	74.8	36.5	71.7	61.9	53.9	53.3	62.9	55.1	62.5	48.2



Overall segment leader Olive Garden finished just outside the top-three rating for Food Quality but managed top scores for Value, Menu Variety and Reputation. Olive Garden's longstanding effort to frequently refresh its limited-time offers likely has much to do with its top Value and Menu Variety ratings, particularly when many are as value-driven as its 2 for \$25 Italian Dinner and frequent offerings for unlimited salad and breadsticks. By attaining the top marks for Food Quality and Service, Carrabba's Italian Grill finished close behind Olive Garden in Overall Scores.

Bonefish Grill, Red Lobster and Joe's Crab Shack finished first, second and third overall, respectively, and many individual attribute ratings followed a similar one-two-three pattern. Promoting specials like Dynamite King Salmon and Lobster Rolls helped Bonefish hold off Red Lobster in the Menu Variety category, while the chain built a bigger lead in terms of Food Quality, Cleanliness, Service and Reputation. Red Lobster's leading Value rating drove it toward the top in Likely to Recommend and Likely to Return, and Joe's underperformance in those metrics helped lead to its third-place finish.



Seafood

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
BONEFISH GRILL	73.9%	87.2%	38.4%	86.6%	78.1%	68.8%	80.0%	76.4%	63.8%	74.1%	63.1%
RED LOBSTER	69.1	79.1	42.3	74.1	70.8	67.9	73.2	65.0	67.7	74.9	67.0
JOE'S CRAB SHACK	63.1	76.1	34.3	56.6	66.4	58.3	69.1	70.1	65.2	69.4	53.1

Steak

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
TEXAS ROADHOUSE	69.5%	82.7%	54.8%	62.8%	72.8%	68.2%	74.1%	68.2%	65.3%	70.9%	61.1%
OUTBACK STEAKHOUSE	69.2	81.5	43.6	73.5	76.4	63.5	75.2	67.7	63.1	72.9	64.4
LONGHORN STEAKHOUSE	68.1	79.9	41.1	76.6	72.8	62.5	68.2	68.3	65.7	68.3	59.7
LOGAN'S ROADHOUSE	60.7	74.7	47.1	56.4	62.6	61.7	58.9	55.9	55.2	68.1	59.6
LONE STAR STEAKHOUSE	60.3	77.5	41.1	63.4	62.6	53.0	61.0	57.7	55.0	63.3	54.8



Varied Menu/Other

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
THE CHEESECAKE FACTORY	75.8%	86.1%	35.6%	83.2%	76.0%	84.3%	85.9%	74.8%	73.0%	79.3%	62.4%
P.F. CHANG'S CHINA BISTRO	74.0	82.6	39.2	79.7	76.7	76.5	81.4	79.0	70.0	71.7	63.2
MIMI'S CAFE	69.9	79.8	49.1	78.4	72.5	74.8	70.7	73.2	53.0	70.6	55.2
BJ'S RESTAURANT & BREWHOUSE	68.7	76.0	41.0	80.5	67.2	77.4	70.3	70.4	55.9	73.0	63.2
CALIFORNIA PIZZA KITCHEN	67.9	78.8	40.3	77.9	67.9	67.2	71.8	61.6	65.9	71.7	60.7
HARD ROCK CAFE	67.3	64.8	36.8	75.6	70.9	62.8	78.0	82.9	57.7	71.1	56.8
RED ROBIN GOURMET BURGERS	66.6	78.9	44.9	71.8	69.4	64.9	69.7	63.7	60.5	68.2	62.5
FAMOUS DAVE'S	66.1	80.6	48.4	64.6	65.0	58.0	68.9	64.1	65.2	75.7	63.3
SMOKEY BONES BAR & FIRE GRILL	64.9	76.9	48.7	68.7	64.6	63.2	61.7	58.7	59.9	73.6	59.0
O'CHARLEY'S	64.2	72.1	45.9	69.9	67.2	67.8	64.2	59.2	53.3	70.5	64.2
CHEDDAR'S	63.7	70.9	57.8	67.5	59.3	63.6	59.2	65.2	55.7	73.6	64.9
T.G.I. FRIDAY'S	62.4	66.9	46.8	65.0	65.2	70.0	63.6	60.3	54.4	63.9	61.1
NINETY NINE RESTAURANTS**	62.3	68.0	53.7	71.3	67.7	66.3	55.2	51.5	48.8	70.9	61.2
CHILI'S GRILL & BAR	61.4	67.5	41.8	61.6	63.9	70.8	62.0	59.6	56.5	65.0	64.7
APPLEBEE'S	61.0	65.8	49.5	63.8	61.3	67.5	61.1	60.2	51.3	63.3	63.5
ON THE BORDER MEXICAN GRILL & CANTINA	60.2	69.9	46.0	62.1	57.6	62.6	54.6	64.0	55.5	61.2	55.5
CHEVYS FRESH MEX**	60.1	71.6	46.9	62.4	58.2	58.9	50.7	62.4	58.4	66.6	54.8
DAVE & BUSTER'S	59.2	59.1	36.6	61.6	56.6	58.1	66.1	78.1	49.0	65.5	52.9
HOOTERS	58.6	56.9	41.7	57.4	69.5	46.1	63.5	71.0	60.6	60.7	57.3
RUBY TUESDAY	58.5	67.6	38.0	65.7	61.6	62.1	58.3	58.7	46.6	60.7	56.9
BUFFALO WILD WINGS	58.1	61.0	35.6	57.7	59.0	51.3	61.6	67.4	60.6	65.9	57.9
SONNY'S REAL PIT BAR-B-Q**	55.6	64.7	53.2	53.6	59.4	45.5	56.6	42.8	55.5	68.6	66.3
JOHNNY ROCKETTS	51.6	55.6	35.9	55.0	58.7	37.7	54.2	57.1	51.5	55.7	45.2

The Cheesecake Factory and P.F. Chang's China Bistro took the top two overall spots by placing near the top of most attribute ratings, and Mimi's Cafe rose to the No. 3 overall ranking with a different grouping of attribute strengths. That chain, which has struggled recently to reverse falling same-store sales, achieved the third-highest rating for Service and was among the best performers for Value and Food Quality, while lagging in Craveability. Casual Dining's two biggest chains, Applebee's and Chili's Grill & Bar, finished in the middle of the pack, with Overall Scores just below the category average. Cheddar's leading Value perception did not lift it much higher in overall preference scores.

Fine Dining

CHAIN	OVERALL SCORE*	FOOD QUALITY	VALUE	CLEANLINESS	SERVICE	MENU VARIETY	REPUTATION	ATMOSPHERE	CRAVEABILITY	LIKELY TO RECOMMEND	LIKELY TO RETURN
RUTH'S CHRIS STEAK HOUSE	78.6%	93.6%	38.7%	84.8%	83.0%	71.2%	90.1%	81.7%	75.1%	81.3%	63.8%
McCORMICK & SCHMICK'S	76.3	86.8	40.1	87.7	83.3	70.9	85.1	84.5	63.8	71.1	61.7

*WEIGHTED BY ATTRIBUTE IMPORTANCE **100-149 RESPONSES

Cracker Barrel Old Country Store

NUMBER OF UNITS: 603
U.S. SYSTEMWIDE SALES: \$1.93 billion
SURVEY STRENGTHS: Menu Variety, Reputation, Atmosphere, Likely to Recommend
LAST YEAR'S RANK: 1
RECENT NEWS: activist investor Sardar Biglari increased his stake in the chain's parent company, founder Dan Evins passed away



1st

Marie Callender's

NUMBER OF UNITS: 80
U.S. SYSTEMWIDE SALES: \$196.6 million
SURVEY STRENGTHS: Food Quality
LAST YEAR'S RANK: 3
RECENT NEWS: parent company Perkins & Marie Callender's Inc. exited Chapter 11 bankruptcy, named Jeffrey Warne Chief Executive



2nd

Bob Evans Restaurants

NUMBER OF UNITS: 565
U.S. SYSTEMWIDE SALES: \$959 million
SURVEY STRENGTHS: Food Quality, Menu Variety
LAST YEAR'S RANK: 2
RECENT NEWS: continuing remodeling efforts and new menu initiatives



3rd

The Original Pancake House

NUMBER OF UNITS: 116
U.S. SYSTEMWIDE SALES: \$160 million for 2011*
SURVEY STRENGTHS: Food Quality, Cleanliness, Craveability
LAST YEAR'S RANK: N/A
RECENT NEWS: continuing to use fresh-made batters and sauces for signature pancakes and omelets



4th

IHOP

NUMBER OF UNITS: 1,514
U.S. SYSTEMWIDE SALES: \$2.62 billion
SURVEY STRENGTHS: Food Quality, Value, Menu Variety
LAST YEAR'S RANK: 5
RECENT NEWS: refocused on breakfast with new ad campaign, began retailing syrup line



5th

Taking the initiative

BY RON RUGGLESS

Cracker Barrel Old Country Store continued to rock its way to the top of the Family-Dining pack in the 2012 Consumer Picks survey.

The Lebanon, Tenn.-based full-service operator led in eight of the 10 attribute categories, pulling ahead by a significant 14-point margin in the case of Atmosphere and more than 12 points in the case of Reputation.

Cracker Barrel slipped to No. 2 only in the categories of Value, in which Norcross, Ga.-based Waffle House edged into No. 1, and Food Quality, where Memphis, Tenn.-based Marie Callender's took the top spot.

Marie Callender's and Columbus, Ohio-based Bob Evans Restaurants remained solidly in the top three rankings in nearly every category, with newcomer to the survey The Original Pancake House edging out Bob Evans in the Likely to Recommend and Likely to Return categories.

Marie Callender's was able to maintain its rating strength while its parent company, Perkins & Marie Callender's Inc., emerged from Chapter 11 bankruptcy in December 2011.

Bob Evans Farms, meanwhile, tied Marie Callender's in Reputation and nudged up its Atmosphere scores, linked no doubt to an ongoing refurbishment program.

In June, Bob Evans chief executive Steve Davis said the chain would continue remodeling its restaurants and creating value-driven menu offerings. The ongoing Farm-Fresh Refresh program at Bob Evans produced 87 remodels in fiscal 2012, with refurbished units showing 5-percent higher sales over the rest of the chain, the company said. Bob Evans plans to remodel 150 restaurants in fiscal 2013, including 40 locations in the Columbus market in the first quarter.

One of the big shifts in rankings was in the Value category. Last year Denny's topped the list, likely influenced heavily by the promotional jet fuel of its \$2 \$4 \$6 \$8 Value Menu. Frances Allen, Denny's chief marketing officer, has told Nation's Restaurant News that quad-level pricing "has over 60 percent awareness among all restaurant customers." This year, however, Denny's was pushed to fifth place, with Waffle House taking the lead.

The Family-Dining segment has flexibility in pricing because its operators tend to focus less heavily on proteins, but it faces many of the development costs of casual dining.

Cracker Barrel's clear Consumer Picks leadership in the Family-Dining segment relies on a halo effect from several initiatives the company has

undertaken in the past year. Executives cited five areas that it has emphasized, including:

Marketing. The company, which is under pressure from San Antonio-based activist investor Sardar Biglari, whose company owns Steak n Shake, refocused its advertising last fall, running national cable TV advertising from mid-November to mid-December. It centered on a new branding message of "Handcrafted by Cracker Barrel" and was the first time Cracker Barrel has advertised nationally. The company said research found the message reached targeted users and



Cracker Barrel Old Country Store reclaimed the top spot in this year's survey, thanks in part to its \$5.99 weekday lunch specials.

strengthened their perceptions of Cracker Barrel.

Social and digital media. The company has gained momentum in this area, which it said extends the Cracker Barrel experience outside the stores. The company grew its Facebook follower base by 49 percent in the third quarter, is working to engage Twitter users and launched a Pinterest pinboard in April.

Music. Relying on its Tennessee-steeped country roots, Cracker Barrel capitalizes on music artists to differentiate itself from competitors. In April the company released a DVD/CD set by Dolly Parton called "An Evening with Dolly." It held the No. 2 spot on Billboard's Top Music DVD Chart for three consecutive weeks.

Menu. Cracker Barrel refined its menu and pricing strategies to focus on value, affordability and variety. The company introduced \$5.99 weekday lunch specials last September. Officials said such moves helped to improve guest loyalty scores, and lunchtime traffic grew the most of any daypart in the third quarter.

Operations. Cracker Barrel updated equipment and technology in its stores, including enhancing the production planning system to help managers better organize food preparation. The company said it expects improved food quality and reduced waste. ■

*SOURCE: COMPANY REPORTED
 NOTE: ALL FIGURES TAKEN FROM NATION'S RESTAURANT NEWS TOP 200 RESEARCH UNLESS OTHERWISE NOTED

Overall Scores

RANK	CHAIN	SCORE*
1	CRACKER BARREL OLD COUNTRY STORE	70.3%
2	MARIE CALLENDER'S**	62.1
3	BOB EVANS RESTAURANTS	61.2
4	THE ORIGINAL PANCAKE HOUSE**	59.7
5	IHOP	53.5
6	STEAK N SHAKE	52.1
7	VILLAGE INN	51.9
8	PERKINS RESTAURANT & BAKERY	51.5
9	BIG BOY	50.2
10	FRIENDLY'S ICE CREAM	47.5
11	SHONEY'S	45.5
12	HUDDLE HOUSE**	44.8
13	DENNY'S	43.9
14	WAFFLE HOUSE	41.4

*WEIGHTED BY ATTRIBUTE IMPORTANCE

**100-149 RESPONSES



Consumer Picks survey newcomer The Original Pancake House edged out Cracker Barrel Old Country Store in two attribute categories – Likely to Recommend and Likely to Return – helping it to claim a fourth-place overall finish in the Family-Dining category.



TOP 10 Likely to Return

1	Cracker Barrel Old Country Store	68.5%
2	Bob Evans Restaurants	62.9
3	The Original Pancake House**	62.7
4	Huddle House**	59.6
5	Marie Callender's**	59.1
6	Steak n Shake	58.5
7	Big Boy	55.1
8	Village Inn	54.1
9	Friendly's Ice Cream	53.8
10	IHOP	53.2

**100-149 RESPONSES

Giving them what they want

Top scorers in each survey category in order of importance to diners

	1	2	3
FOOD QUALITY	MARIE CALLENDER'S**	CRACKER BARREL OLD COUNTRY STORE	BOB EVANS RESTAURANTS
CLEANLINESS	CRACKER BARREL OLD COUNTRY STORE	MARIE CALLENDER'S**	BOB EVANS RESTAURANTS
SERVICE	CRACKER BARREL OLD COUNTRY STORE	MARIE CALLENDER'S**	BOB EVANS RESTAURANTS
VALUE	WAFFLE HOUSE	CRACKER BARREL OLD COUNTRY STORE	HUDDLE HOUSE**
MENU VARIETY	CRACKER BARREL OLD COUNTRY STORE	BOB EVANS RESTAURANTS	MARIE CALLENDER'S**
CRAVEABILITY	CRACKER BARREL OLD COUNTRY STORE	STEAK N SHAKE	THE ORIGINAL PANCAKE HOUSE**
ATMOSPHERE	CRACKER BARREL OLD COUNTRY STORE	MARIE CALLENDER'S**	BOB EVANS RESTAURANTS
REPUTATION	CRACKER BARREL OLD COUNTRY STORE	MARIE CALLENDER'S**	BOB EVANS RESTAURANTS
LIKELY TO RECOMMEND	CRACKER BARREL OLD COUNTRY STORE	BOB EVANS RESTAURANTS	THE ORIGINAL PANCAKE HOUSE**

**100-149 RESPONSES

Family Dining 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	70.3%	74.8%	55.6%	72.2%	72.1%	74.9%	75.5%	69.7%	58.7%	77.0%	68.5%
MARIE CALLENDER'S**	62.1	76.9	43.5	68.0	64.7	67.4	63.1	55.7	53.6	61.4	59.1
BOB EVANS RESTAURANTS	61.2	68.5	47.7	67.6	63.0	71.5	63.1	51.2	44.1	65.7	62.9
THE ORIGINAL PANCAKE HOUSE**	59.7	67.8	48.0	64.7	62.8	63.9	59.4	44.5	55.5	63.6	62.7
IHOP	53.5	58.6	52.0	51.0	53.2	63.6	53.9	39.8	47.7	57.0	53.2
STEAK N SHAKE	52.1	57.5	53.0	49.4	49.9	45.7	52.8	41.0	55.7	60.8	58.5
VILLAGE INN	51.9	51.9	47.8	50.4	55.0	63.9	49.4	40.8	44.7	57.3	54.1
PERKINS RESTAURANT & BAKERY	51.5	55.2	44.1	53.7	55.5	66.4	48.3	38.3	40.9	53.0	50.9
BIG BOY	50.2	50.2	43.8	54.4	51.8	54.5	56.3	34.1	45.7	54.4	55.1
FRIENDLY'S ICE CREAM	47.5	44.9	45.4	48.6	46.3	50.6	50.3	37.3	45.3	54.7	53.8
SHONEY'S	45.5	39.7	47.2	49.0	47.8	50.6	43.8	37.4	40.1	51.1	40.4
HUDDLE HOUSE**	44.8	46.7	53.2	42.3	40.7	46.2	40.3	32.7	38.5	59.0	59.6
DENNY'S	43.9	42.8	52.1	39.5	44.6	55.8	37.5	33.8	36.2	47.3	48.9
WAFFLE HOUSE	41.4	43.8	56.5	26.1	48.7	40.7	38.2	23.9	43.0	47.0	49.6

*WEIGHTED BY ATTRIBUTE IMPORTANCE **100-149 RESPONSES

KEY FINDING: One of the most notable shakeups was in the Value attribute. Last year Denny's topped the list, likely influenced by its \$2 \$4 \$6 \$8 Value Menu. This year, however, the top Value spot went to Waffle House, and Denny's fell to fifth place.

LIMITED SERVICE

Chains with the highest overall scores among each demographic group*

Female

- Marble Slab Creamery**
- Papa Murphy's Take 'N' Bake Pizza
- Chick-fil-A
- In-N-Out Burger
- Ben & Jerry's

Male

- Potbelly Sandwich Works**
- Marble Slab Creamery**
- In-N-Out Burger
- Papa Murphy's Take 'N' Bake Pizza
- Firehouse Subs

Millennials

- In-N-Out Burger
- Starbucks Coffee
- Panera Bread
- Marble Slab Creamery**
- Ben & Jerry's

Gen X

- Marble Slab Creamery**
- Bruster's Real Ice Cream**
- Papa Murphy's Take 'N' Bake Pizza
- Ben & Jerry's
- Corner Bakery Cafe**

Boomers

- Marble Slab Creamery**
- Papa Murphy's Take 'N' Bake Pizza
- In-N-Out Burger
- Häagen-Dazs
- Culver's

Seniors

- Papa Murphy's Take 'N' Bake Pizza
- Tim Hortons
- In-N-Out Burger
- McAlister's Deli
- Baskin-Robbins

Household income: LESS THAN \$25,000

- Souplantation/Sweet Tomatoes
- Jason's Deli
- Culver's
- Taco John's**
- Papa Murphy's Take 'N' Bake Pizza

\$25,000 to \$49,999

- Marble Slab Creamery**
- In-N-Out Burger
- Jason's Deli
- Culver's
- Firehouse Subs

\$50,000 to \$74,999

- In-N-Out Burger
- Papa Murphy's Take 'N' Bake Pizza
- Corner Bakery Cafe**
- Ben & Jerry's
- Cold Stone Creamery

\$75,000 to \$100,000

- Papa Murphy's Take 'N' Bake Pizza
- Firehouse Subs
- McAlister's Deli
- In-N-Out Burger
- Chick-fil-A

MORE THAN \$100,000

- Bruster's Real Ice Cream**
- Jet's Pizza**
- Häagen-Dazs
- Marble Slab Creamery**
- Chick-fil-A



CASUAL DINING

Chains with the highest overall scores among each demographic group*

Female

- The Cheesecake Factory
- Bonefish Grill
- Carrabba's Italian Grill
- Olive Garden
- P.F. Chang's

Male

- P.F. Chang's China Bistro
- Bonefish Grill
- The Cheesecake Factory
- Olive Garden
- Mellow Mushroom Pizza Bakers**

Millennials

- Bonefish Grill
- The Cheesecake Factory
- Olive Garden
- Carrabba's Italian Grill
- P.F. Chang's China Bistro

Gen X

- P.F. Chang's China Bistro
- The Cheesecake Factory
- Mellow Mushroom Pizza Bakers**
- Bonefish Grill
- Texas Roadhouse

Boomers

- BJ's Restaurant & Brewhouse
- The Cheesecake Factory
- Bonefish Grill
- Carrabba's Italian Grill
- California Pizza Kitchen

Seniors

- The Cheesecake Factory
- Romano's Macaroni Grill
- Cheddar's
- Mimi's Cafe
- California Pizza Kitchen



Household income: LESS THAN \$25,000

- The Cheesecake Factory
- BJ's Restaurant & Brewhouse
- Uno Chicago Grill/Pizzeria Uno
- Smokey Bones Bar & Fire Grill
- Olive Garden

\$25,000 to \$49,999

- The Cheesecake Factory
- Romano's Macaroni Grill
- Olive Garden
- Red Lobster
- P.F. Chang's China Bistro

\$50,000 to \$74,999

- Cracker Barrel Old Country Store
- Bob Evans Restaurants
- Marie Callender's**
- The Original Pancake House**
- Big Boy
- IHOP
- Steak n Shake

\$75,000 to \$100,000

- Cracker Barrel Old Country Store
- Bob Evans Restaurants
- Village Inn
- Huddle House**
- Perkins Restaurant & Bakery

MORE THAN \$100,000

- Huddle House**
- The Original Pancake House**
- Marie Callender's**
- Cracker Barrel Old Country Store
- Steak n Shake

- \$50,000 to \$74,999
- BJ's Restaurant & Brewhouse
- The Cheesecake Factory
- Outback Steakhouse
- Bonefish Grill
- Mimi's Cafe

- \$75,000 to \$100,000
- Buca di Beppo
- The Cheesecake Factory
- P.F. Chang's China Bistro
- Bonefish Grill
- Red Lobster

- MORE THAN \$100,000
- Mellow Mushroom Pizza Bakers**
- Bonefish Grill
- P.F. Chang's China Bistro
- LongHorn Steakhouse
- Romano's Macaroni Grill

FAMILY DINING

Chains with the highest overall scores among each demographic group*

Female

- Cracker Barrel Old Country Store
- Bob Evans Restaurants
- Marie Callender's**
- IHOP
- Village Inn

Male

- Cracker Barrel Old Country Store
- The Original Pancake House**
- Marie Callender's**
- Bob Evans Restaurants
- Perkins Restaurant & Bakery

Millennials

- Cracker Barrel Old Country Store
- The Original Pancake House**
- Marie Callender's**
- Perkins Restaurant & Bakery
- Big Boy

Gen X

- Cracker Barrel Old Country Store
- Bob Evans Restaurants
- Marie Callender's**
- The Original Pancake House**
- Big Boy

Boomers

- Cracker Barrel Old Country Store
- Marie Callender's**
- The Original Pancake House**
- Bob Evans Restaurants
- Village Inn

Seniors

- Bob Evans Restaurants
- Cracker Barrel Old Country Store
- Marie Callender's**
- IHOP
- Steak n Shake

Household income: LESS THAN \$25,000

- Cracker Barrel Old Country Store
- The Original Pancake House**
- Big Boy
- IHOP
- Steak n Shake

\$25,000 to \$49,999

- Cracker Barrel Old Country Store
- Marie Callender's**
- Bob Evans Restaurants
- Friendly's Ice Cream
- Village Inn

\$50,000 to \$74,999

- Cracker Barrel Old Country Store
- Marie Callender's**
- The Original Pancake House**
- Bob Evans Restaurants
- IHOP

\$75,000 to \$100,000

- Cracker Barrel Old Country Store
- Bob Evans Restaurants
- Village Inn
- Huddle House**
- Perkins Restaurant & Bakery

MORE THAN \$100,000

- Huddle House**
- The Original Pancake House**
- Marie Callender's**
- Cracker Barrel Old Country Store
- Steak n Shake



*MILLENNIALS BORN 1982-2000. ONLY MILLENNIALS 17 OR OLDER QUALIFIED TO TAKE THE SURVEY; GEN X BORN 1965-1981; BOOMERS BORN 1946-1964; SENIORS BORN 1945 OR EARLIER

** BRANDS WITH 100 TO 149 RESPONSES

The lists on this page do not reflect any actual scores, but rather which chains' responses skewed heavily toward certain groups.

Family favorites

Brands that appealed most to diners with children under 7:

- Chick-fil-A
- Chevys Fresh Mex**
- Cracker Barrel Old Country Store
- Häagen-Dazs
- In-N-Out Burger
- Marie Callender's**
- Olive Garden
- The Original Pancake House**
- P.F. Chang's China Bistro



Brands that appealed most to families with children 7 to 17:

- Ben & Jerry's
- Bob Evans Restaurants
- The Cheesecake Factory
- Cracker Barrel Old Country Store
- Häagen-Dazs
- Marble Slab Creamery**
- The Original Pancake House**
- P.F. Chang's China Bistro
- Red Lobster



Brands that appealed most to families with children in both age groups:

- Big Boy
- Chick-fil-A
- Chevys Fresh Mex**
- Cracker Barrel Old Country Store
- Johnny Rockets
- Panera Bread
- Pei Wei Asian Diner
- Romano's Macaroni Grill
- Shoney's



Broad appeal

Brands that saw little difference in scores across generational groups:

- Au Bon Pain**
- Big Boy
- Bonefish Grill
- The Cheesecake Factory
- Cold Stone Creamery
- Cracker Barrel Old Country Store
- Denny's
- Domino's Pizza
- Friendly's Ice Cream
- LongHorn Steakhouse
- On the Border Mexican Grill & Cantina
- Qdoba Mexican Grill
- Red Lobster
- Shoney's
- Whataburger

**BRANDS WITH 100 TO 149 RESPONSES

Get inside the minds of retail experts.
And your customers.
Expert Insights. In-Depth Analysis.
Surprising Predictions.

sign up
for quarterly e-magazine

WAYFIND
WDWAYFIND.COM



wd

888.335.0014
WDPARTNERS.COM

For more information:



WD Partners is a customer experience expert for global food and retail brands. The company helps brands innovate through strategy, design, architecture & engineering, and fabrication & installation services.

For information about additional industry insights, or custom runs of the Consumer Picks data, please contact:

Dennis Lombardi

Executive Vice President, Foodservice Strategies

WD Partners

614 634 7182

dennis.lombardi@wdpartners.com

ATLANTA
COLUMBUS
HONG KONG
KUALA LUMPUR
LOS ANGELES
MUMBAI
NEW YORK METRO
PHOENIX
SAN FRANCISCO
SHENZHEN
TORONTO

WDPARTNERS.COM



Chris Keating

Associate Publisher

Nation's Restaurant News

212.204.4391

Chris.Keating@Penton.com