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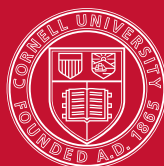


Online, Mobile, and Text Food Ordering in the U.S. Restaurant Industry

Cornell Hospitality Report

Vol. 11, No. 7, March 2011

by Sheryl E. Kimes, Ph.D., and Philipp F. Laqué



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Cornell Hospitality Reports,
Vol. 11, No. 7 (March 2011)

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Cornell Hospitality Report is produced for
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Center for Hospitality Research
Cornell University
School of Hotel Administration
489 Statler Hall
Ithaca, NY 14853

Phone: 607-255-9780

Fax: 607-254-2922

www.chr.cornell.edu

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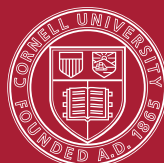
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EXECUTIVE SUMMARY

A survey of the top 326 U.S. restaurant chains in all categories finds the industry gradually adopting electronic ordering, in the form of online, mobile, and text orders. Quick-service chains, most notably those selling pizza, and fast-casual chains are far ahead of other segments in adopting electronic ordering, particularly using online approaches. Mobile apps are less common, although their use is growing. Although order-placing functionality is limited for mobile apps, the fast-casual chains are leading the way in allowing customers to place orders. Nearly all restaurant chains have a Facebook presence, but just 3 percent allowed ordering through that channel. The advantages of electronic ordering include increased sales, particularly through automatic upselling and by storing order information so that customers are encouraged to repeat their previous orders with a single click. Other than the cost of installation and operation, the chief disadvantage of electronic ordering is the potential for amplifying rush time volume, with the potential of overwhelming the kitchen. Creating a separate line for electronic orders and pickups is one way to address that problem.

ABOUT THE AUTHORS

Sheryl E. Kimes, Ph.D., is Singapore Tourism Board Distinguished Professor of Asian Hospitality Management at the Cornell University School of Hotel Administration, where she has also served as interim dean (sek6@cornell.edu). In teaching restaurant revenue management, yield management, and food and beverage management, she has been named the school's graduate teacher of the year three times. Her research interests include revenue management and forecasting in the restaurant, hotel, and golf industries. She has published over fifty articles in leading journals such as *Interfaces*, *Journal of Operations Management*, *Journal of Service Research*, *Decision Sciences*, and *Cornell Hospitality Quarterly*. She has served as a consultant to many hospitality enterprises around the world, including Chevy's FreshMex Restaurants, Walt Disney World Resorts, Ruby's Diners, Starwood Asia-Pacific, and Troon Golf.



Philipp Laqué is a student in the Master of Management in Hospitality program at the School of Hotel Administration (pfl23@cornell.edu). During his time at Cornell University, Philipp concentrated in multiunit restaurant management. Prior to joining the MMH class of 2011 he worked for Starbucks Coffee in Germany and the trade publications *FoodService Europe & Middle East* and *food-service*. Philipp completed internships at The Savoy Hotel London, The Palace Hotel Beijing, and Darden Orlando. Philipp holds a Bachelor of Science Degree in International Hospitality Management from the Ecole hôtelière de Lausanne Switzerland.



The authors and the Cornell Center for Hospitality Research greatly appreciate the sponsorship of *Nation's Restaurant News* in supporting this research study.

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Online, mobile, and text food ordering is growing in popularity among both consumers and restaurants, because electronic ordering can benefit all concerned. Consumers are embracing electronic ordering because of its ease, speed, and precision,¹ while restaurants see the potential for increased revenue and fewer errors—and they are responding to obvious consumer demand. Electronic ordering has become particularly successful for pizza chains. After launching an updated online ordering system in 2009, Domino's is now the number-four online retailer in the U.S.,² and Papa John's has reported that over 25 percent of its traffic comes from electronic orders.³

¹ Michael J. Dixon, Sheryl E. Kimes, and Rohit Verma, "Customer Preferences and Use of Technology-Based Service Innovations in Restaurants," *Cornell Hospitality Report*, Vol. 9, No. 7 (2009), Center for Hospitality Research; <http://www.hotelschool.cornell.edu/research/chr/pubs/reports/abstract-15027.html>; and Technomic, "Leveraging Social Media and Technology Use," Technomic Associates, 2010.

² Claire Cain Miller, "On the Go and Hungry? Dinner Is an App Away," *New York Times*. May 31, 2010; http://www.nytimes.com/2010/05/31/technology/31snapfinger.html?_r=1&dbk, viewed December 23, 2010.

³ Papa John's, "Online Ordering Leader Papa John's First to Surpass \$2 Billion in Online Sales," May 3, 2010; <http://ir.papajohns.com/releasedetail.cfm?ReleaseID=465852>, viewed December 26, 2010.

This report reviews the restaurant industry's current status regarding electronic ordering, including restaurants' current electronic ordering capabilities, and examines the issues involved in its adoption. Subsequent reports will present the results of a survey of U.S. consumers' attitudes toward and use of different electronic ordering options and a survey of how U.S. fast-casual and quick-service restaurants are using electronic ordering processes and what experience they have had with these technologies.

We will start by reviewing ordering and distribution channels and vendors and then discuss the potential advantages and disadvantages of using online, texting, and mobile sources for ordering. We will next consider customer adoption and reaction to electronic ordering. Subsequently, we will present the results of a study of the electronic ordering capabilities of the largest 326 U.S. restaurant chains. We will conclude with a discussion of issues that restaurant operators should consider before implementing electronic ordering.

Electronic Distribution Channels and Providers

Restaurants can offer electronic ordering both through their own internet or mobile site and through multi-restaurant sites. If a restaurant wants to use its own site, it needs to make sure (1) it has ordering capability and (2) it does its best to link the electronic order engine to the POS system as directly as possible. Developing a proprietary system can be expensive in terms of development costs, but would offer a modest cost per order once the system is established. Several vendors develop proprietary systems or support restaurants' electronic ordering systems, including Exit 41, Kudzu/Snapfinger, ONOSYS, orderTalk, QuikOrder, and TakeOut Technologies. All of these vendors offer online ordering and most also offer mobile apps. Exit 41, Kudzu/Snapfinger, and orderTalk also support Facebook ordering and text ordering. For these systems,

upfront development costs would be fairly low, but the cost per order would be a continuing expense.

Multi-restaurant site. Even if a restaurant establishes its own site, it may also want to appear on a multi-restaurant site such as Snapfinger.com or Grubhub.com. While these sites increase a restaurant's visibility they also risk possible commoditization of the restaurant, and they incur per-order costs.

The largest multi-restaurant electronic ordering site, Snapfinger/Kudzu lists 28,000 restaurants, and other major players also have a substantial number of clients: CampusFood.com (25,000 restaurants), GrubHub (13,000 restaurants), and Delivery.com (10,000 restaurants). The volume of mobile app ordering has grown for these sites. In 2010, Snapfinger's mobile order volume rose to 17 percent within one year of the launch of its mobile apps.⁴

Facebook ordering. Although most restaurants have a Facebook presence, few offer Facebook ordering. Exceptions include Pizza Hut, which began Facebook ordering in 2008, Jimmy John's Gourmet Sandwiches, and California Pizza Kitchen.⁵ Facebook users can also "Like" a particular menu item, and their friends can click into the restaurant's online ordering system if they want to order the "Liked" item.⁶

⁴ Alan J. Liddle, "More Consumers Using Mobile Apps for Restaurants," *Nation's Restaurant News*, November 9, 2010; <http://www.nrn.com/article/more-consumers-using-mobile-apps-restaurants?ad=marketing>, viewed December 23, 2010.

⁵ Alan J. Liddle, "Restaurants Using Facebook to Drive Online Orders," *Nation's Restaurant News*, November 19, 2010; <http://www.nrn.com/article/restaurants-using-facebook-drive-online-orders>, viewed December 23, 2010.

⁶ *Ibid.*

Text ordering. Papa John's, Subway, and McDonald's are among the restaurants that have given customers a specific texting number to enter into their mobile phone. When the restaurant receives the text order, a confirmation text is sent back to the customer, who can then just go to the restaurant to pick up the order. Among the multi-restaurant sites that support text ordering are Exit41, GoMobo, and Zingle. We expect text ordering to diminish as people install ordering apps on their smartphones, but we still see great potential in text-message marketing.

Potential Advantages of Electronic Food Ordering

We see the following four potential benefits from electronic ordering: (1) increased revenue, (2) improved capacity management, (3) improved productivity, and (4) improved transactional marketing and customer relationship management.

- (1) **Increased revenue.** Electronic ordering has the potential to increase revenue in four ways: (a) higher average check through upselling, (b) increased volume, (c) increased order frequency (by facilitating repeat orders), and (d) prepaid orders.
 - (a) **Increased average check.** Restaurants using electronic ordering report an average check increase of 25 percent, primarily due to successful upselling.⁷ Upselling is enhanced with electronic ordering since the upsell offer is made automatically.
 - (b) **Increased volume.** Restaurants using electronic ordering also report more frequent orders and increases in group and catering orders because of the ease of placing an order. The simple addition of new distribution channels has a high probability of attracting customers.
 - (c) **Increased frequency.** By the same token, restaurants using electronic ordering report an increase in repeat business because it is easier for customers to place repeat orders, especially when the system stores past orders so that customers can simply click on their previous order.
 - (d) **Increase in prepaid orders.** When customers place electronic orders, they often pay upfront with a credit (or debit) card, meaning that there's little chance for a person to order and never show, or otherwise fail to pay.
- (2) **Improved capacity management.** Capacity management is improved in two ways. If orders are placed ahead of time (as is often the case with catering and group orders), the restaurant can better plan when to

prepare the order and better spread out the load on the kitchen. More to the point, increased order volume can help the restaurant make better use of any slack in kitchen capacity.

- (3) **Improved order accuracy and productivity.** Electronic ordering can help restaurants improve order accuracy and employee productivity. Electronic ordering improves order accuracy since the orders are all in written form, and product waste and rework should be reduced. In addition, electronic ordering reduces or eliminates the order taking function freeing employees to focus on producing and delivering an order.
- (4) **Improved customer relationship management.** Finally, electronic ordering routines provide restaurant operators with key customer information that can be useful for developing promotion strategies, including targeted promotions designed to build off-peak demand, specials aimed at certain customer segments, and couponing strategies. With electronic ordering, customers' data are stored automatically: who the customers are and how (and whether) to contact them, what they like to order, how much they usually spend, and when they like to order.

Potential Disadvantages

Possible disadvantages of online, mobile, and text ordering include increased cost, overburdened facilities, and potential commoditization.

Increased costs. The cost of each order (typically 5 to 7 percent of the order amount paid to the order-system vendor) or the capital cost of building a system and integrating it with the POS must be considered, especially if the electronic ordering cannibalizes traditional ordering mechanisms and average check remains the same.

Impact on food quality and customer satisfaction. While we anticipate that electronic ordering will help with work flow, it is possible that demand will not be smooth. Production peaks may overwhelm the kitchen, to the detriment of food quality and customer satisfaction.

The kitchen overload issue is not hypothetical. Although electronic ordering systems can offer incentives for off-peak or advance ordering, restaurants still cannot control when electronic orders will come in (any more than they can control conventional orders). If electronic orders pile on top of a normally busy time for the restaurant, the kitchen may not be able to keep up with the increased demand. For example, Chipotle encountered this problem when it launched online ordering in 2005. In particular, an increase in group orders overburdened its kitchens during busy periods. To deal with this, Chipotle remodeled its busiest restaurants with a line dedicated to online orders during peak periods. When the

⁷ Miller, *op.cit.*

in-store peak ends, the online orders are switched back to the regular line.⁸

Possible commoditization. As we indicated above, when a restaurant is listed on a third-party ordering site, it is possible that customers might be more likely to view that restaurant as a commodity since there a number of restaurants to choose from.

Customer Adoption of and Reactions to Electronic Ordering

As made clear by the example of Chipotle, customers have embraced online, mobile, and text ordering. A 2010 Technomic study of 1,000 adults showed that 43 percent of survey respondents had ordered online with a computer and 23 percent had ordered food via text message.⁹ Younger consumers were more likely to have used electronic ordering. For example, 60 percent of respondents between 18 and 34 years old had ordered online as opposed to 35 percent of people aged 35 or over. Similarly, younger respondents were more likely to have ordered via text message (29% vs. 20%) or by smartphone app (8% vs. 2%).

The 54.1 percent of respondents who had used electronic ordering found it easier than speaking to a live person (18–34 years old, 59%; 35 years and older, 52%), faster (18–34, 59%, 35+, 45%), and more accurate (18–34, 42%; 35+, 35%). Respondents also reported that they felt more comfortable placing electronic orders because they did not feel as rushed as when they were talking with a restaurant employee (18–34, 37%; 35+, 30%). The availability of discounts and promotions influenced about 25 percent of respondents.

Respondents who had not used electronic ordering said they preferred placing orders over the phone with a live person (male, 42%; female, 39%) and preferred to place orders in person even if it meant a wait (male, 22%; female, 19%). Lack of awareness of online, mobile, or text ordering technology also played a role. A good portion of respondents had never considered ordering online (male, 30%; female, 40%) or via text (male, 15%; female, 26%). Lack of availability was also an issue, since about a quarter of respondents said that none of the restaurants they patronized offered electronic ordering.

Distribution channel use. Most customers (57%) place electronic orders directly with the restaurant rather than through multi-restaurant sites.¹⁰ Of the multi-restaurant sites Technomic found that Delivery.com had the highest

Restaurant customers have embraced online, mobile, and text ordering, particularly for fast-casual and quick-service concepts.

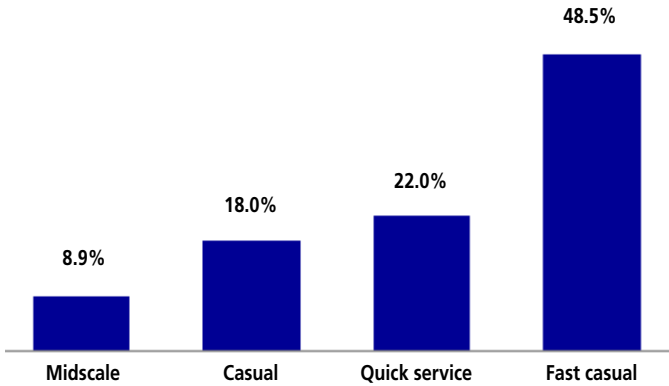
⁸ Steve Coomes, “Chipotle Turns Curses of Online Ordering into Blessings,” *Nation’s Restaurant News*, May 12, 2009; <http://www.nrn.com/article/chipotle-turns-curses-online-ordering-blessings>, viewed December 23, 2010.

⁹ Technomic, *loc. cit.*

¹⁰ *Ibid.*

EXHIBIT 1

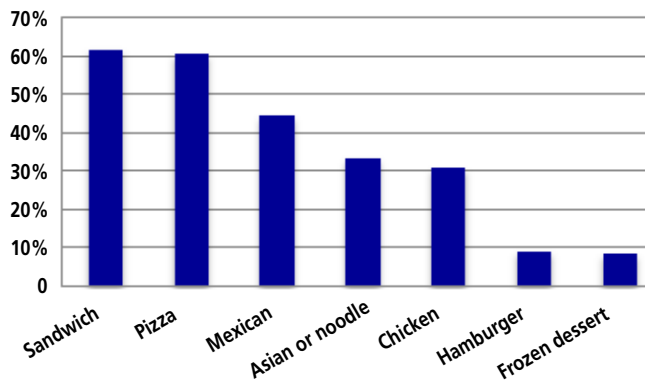
Online ordering frequency by restaurant segment



Note: Fine-dining restaurants recorded no online ordering.

EXHIBIT 2

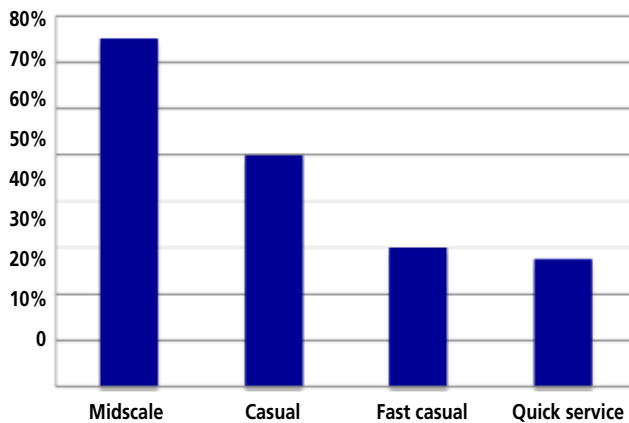
Online ordering frequency by cuisine



Note: Cafeteria and buffet, donut, and coffee and beverage restaurants recorded insufficient online ordering to appear on this graph.

EXHIBIT 3

Upselling screen frequency by segment



usage (11%), followed by Diningin.com (7%), campusfood.com (6%), Grubhub.com (6%), and orderlunch.com (6%).

Our Study

We studied the online ordering capability of the websites of the largest 100 casual-dining restaurants, 66 fast-casual restaurants, 45 full-service midscale restaurants, 15 fine-dining restaurants, and 100 QSRs. We used recent data from Technomic, Inc., to identify the restaurants (listed in the appendix). As part of this study we looked at whether each chain (1) offered online food ordering capabilities, (2) had a Facebook presence, and (3) had a smartphone app.

Online Food Ordering

We wanted to find out the following: whether online food ordering varied by restaurant segment and by cuisine type; the extent of available payment options and the use of upselling screens; and whether the chain had a custom-built ordering system or if they employed a vendor. We evaluated the websites of the 326 largest restaurant chains as listed by Technomic. We believe the results are also of use to independent operators, who face issues identical to those of the chains.

We found that 23 percent of the chains accept online orders, most frequently in the fast-casual (48.5% of all restaurants) and the quick-service segments (22.0%). Online ordering was much less prevalent in the casual (18.0%) and the full-service midscale (8.9%) segments, and it was nonexistent among fine-dining chains (Exhibit 1).

As we indicated at the outset, pizza (60.7%) and sandwich (61.9%) restaurants were most likely to accept electronic orders (Exhibit 2). Mexican (44.4%) restaurants were not far behind in frequency, followed by Asian or noodle (33.3%) and chicken (30.8%) concepts.

About 36 percent of restaurant chains maintained an upselling screen, most commonly in the midscale (75.0%) and casual (50.0%) segments, as compared with the fast-casual (30.0%) and quick-service (27.7%) sectors (Exhibit 3).

Payment options also varied. About half (47%) gave customers the opportunity to either pay online or at the restaurant, about a third (32%) permitted only online settlement, and the remaining 21 percent did not offer online payment (Exhibit 4). As with upselling screens, payment options varied by sector. Three of the five casual restaurants that offered online ordering did not offer online settlement, while

only about 20 percent of fast casual and quick service restaurants did not offer this option.

About one-third (34.2%) of chains with online ordering capabilities had installed a custom-built solution. Our review of restaurant websites showed the use of Snapfinger (17.1%), orderTalk (7.9%), ONOSYS (6.6%), Take Out Tech (5.3%), and Exit 41 (5.3%), as well as numerous smaller vendors.

Facebook presence. Nearly all of the restaurants (96%) were present on Facebook, but only 3 percent offered ordering capabilities through Facebook.

Apps. We believe that smartphone apps present a great opportunity, given that only 16 percent of the restaurants surveyed offered them. QSRs were further ahead on this, as nearly a quarter (22.0%) had apps, while 18.2 percent of fast-casual restaurants did so. Once again few restaurants in the other segments were on board with this trend: fine dining (6.7%), midscale (6.5%), and casual (5.0%) (Exhibit 5).¹¹

However, offering an app didn't mean that customers could order using their smartphone. Of the thirty-four QSR and fast-casual restaurants that offered smartphone apps, just 35.2 percent had ordering capabilities associated with the app. Ordering capability was more common in the fast-casual sector (58.3%) than the quick-service sector (22.7%). It should come as little surprise that all five of the quick-service chains that offered ordering capabilities were pizza restaurants.

Issues to Consider

As restaurant operators consider whether to offer electronic ordering, we believe they need to consider the following issues.

Cost. As a starting point, restaurateurs should determine whether the potential for incremental business from electronic ordering will be sufficient to offset their investment. For the moment, we'll set aside the likelihood that customers will simply expect a restaurant to offer online, text, or mobile apps for ordering as time goes on. Evidence from the field indicates that both volume and average check should increase, but operators should consider this decision carefully and develop plans on how they will promote their electronic ordering capability to build volume.

Production capacity. In conjunction with considerations of system cost, operators also need to carefully consider whether their kitchen can handle the increased number of users that may result from electronic orders, especially during peak times for conventional traffic. The restaurant might set up a dedicated line, as Chipotle did (assuming there is space available), or consider off-site production, streamlined food production, or an increase in personnel. These issues become part of the cost-benefit consideration.

¹¹ For a few examples of fine dining apps, please see apps from: Alain Ducasse, Michael Roux Jr., and Ruth's Chris Steak House.

EXHIBIT 4

Relative frequency of online payment practices

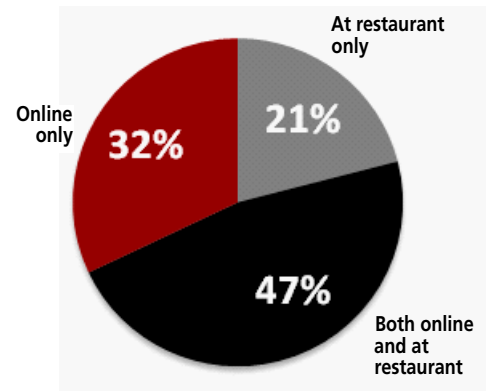
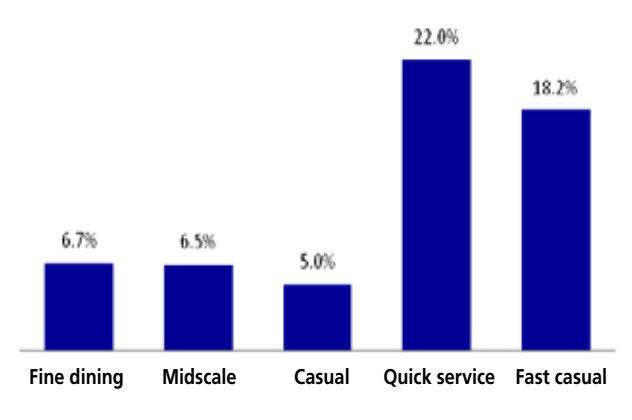


EXHIBIT 5

Frequency of smartphone apps by segment



Delivery capacity. Similar considerations apply to delivery capacity. If the kitchen can produce the food items, but delivery cannot keep up, the restaurant may have to add delivery drivers or vehicles to accommodate increased electronic orders.

Group orders. Restaurateurs must also take into account the effects of a possible increase in group and catering orders. One way to get ahead of the inevitable production bulges from group orders is to consider policies regarding how far ahead group orders need to be placed, or have the system give completion time estimates to set appropriate expectations for the customer and to manage production flow.

Carryout concerns. Restaurateurs also must determine how to handle their carryout traffic, if they offer carryout. Having customers wait in line to pick up their order defeats the purpose of electronic ordering, since speed is essential. The Chipotle solution of having a separate line also applies here. One Ithaca restaurant recently set up an entirely separate location for carryout orders, to direct that traffic away from their main operation, which includes a bar and table service (and avoid clogging the bar entrance with people waiting for pickup orders).

Make or buy? Once the decision has been made to go forward with electronic ordering, the restaurant operator must consider whether to develop their own electronic ordering capabilities or use an outside vendor. As with any make-or-buy decision, the trade-off between upfront costs and operating costs must be analyzed, as we discussed earlier.

If a restaurant wants to build its own system, the company must take into account the need for payment card data security standards (PCI certification), the need for an internal team to maintain the electronic system, and the costs associated with developing and maintaining a safe and secure hosting environment. Most vendors include these features and often include system upgrades and improvements as part of their fee.

Restaurateurs who plan to engage a vendor should consider whether the vendor offers a flat monthly fee or a percentage-based fee model. Monthly fees make it easier to budget, and depending on the volume of electronic orders, may be a less expensive option. Percentage-based fees can be a lower cost option when electronic volume is low, but the costs will quickly add up as order volume increases. In addition, percentage-based fee approaches are more difficult

to budget for, since it's not possible to predict the precise volume of electronic orders from month to month.

System integration. It is essential that electronic orders are clearly communicated to the kitchen. This can be accomplished with full integration with the POS system (ideal, but the most costly) or by email, fax, or text (fairly low cost, but a staff member needs to ensure that the kitchen actually receives the orders).

Payment options. Restaurants should consider offering online credit (or debit) card payment for electronic customers. This provides added convenience for the customers, and also helps speed the transaction for both carryout and delivery orders.

Completion-time estimates. We mentioned posting completion-time estimates in conjunction with group business, but this can be helpful for all customers. When customers order at the restaurant, they can see the queue and remain informed regarding how long it will take to fulfill their order. Operators should consider offering time estimates for electronic orders as well. The challenge of how to develop a reasonably accurate time estimate should be overcome as the operator gains experience with the system.

Placement on a multi-restaurant site. Once a restaurant's online ordering system is up, the restaurateur can determine whether to be listed on a multi-restaurant site as an additional distribution channel. Multi-restaurant sites offer the advantage of increased exposure, but the restaurant then becomes just one of many restaurants for customers to choose from.

Conclusion

In conclusion, electronic ordering offers great potential for the restaurant industry—and almost certainly will become a feature that most customers expect to have available to them. Over 40 percent of U.S. adults have ordered food online, and restaurants using electronic ordering report increases in both average check and order frequency.¹² Setting aside customer expectations, the advantages of electronic ordering (improved order accuracy, improved productivity, and enhanced customer relationship management abilities) will probably offset the costs and operational challenges for most restaurant types. ■

¹² Technomic, *loc. cit.*

Restaurant chains included in this study

Fast Casual Chains

1	Panera Bread/Saint Louis Bread Co.	58
2	Chipotle Mexican Grill	59
3	Panda Express	60
4	Zaxby's	61
5	El Pollo Loco	62
6	Boston Market	63
7	Jason's Deli	64
8	Five Guys Burgers and Fries	65
9	Qdoba Mexican Grill	66
10	Einstein Bros. Bagels	
11	Moe's Southwest Grill	
12	McAlister's Deli	
13	Fuddruggers	
14	Au Bon Pain	
15	Wingstop	
16	Pei Wei Asian Diner	
17	Baja Fresh Mexican Grill	
18	Taco Cabana	
19	Schlotzsky's	
20	Corner Bakery Café	
21	Fazoli's	
22	Noodles & Company	
23	Portillo's Hot Dogs	
24	Taco Bueno	
25	Bruegger's	
26	Rubio's Fresh Mexican Grill	
27	Donatos Pizza	
28	Pollo Tropical	
29	Coji	
30	Raising Cane's Chicken Fingers	
31	Paradise Bakery & Café	
32	Atlanta Bread Company	
33	Back Yard Burgers	
34	la Madeleine Country French Cafe	
35	D'Angelo Grilled Sandwiches	
36	Farmer Boys	
37	Taco Del Mar	
38	Wolfgang Puck Express	
39	Jazzman's Cafe	
40	Pick Up Stix	
41	La Salsa Fresh Mexican Grill	
42	Saladworks	
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44	Pollo Campero	
45	Sandella's Flatbread Café	
46	Tijuana Flats	
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78	Cinnabon	
79	Charley's Grilled Subs	
80	WesterN SizzliN	
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2	Chili's Grill & Bar	60	Saltgrass Steak House
3	Olive Garden	61	Black Angus Steakhouse
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5	Outback Steakhouse	63	Grand Lux Cafe
6	T.G.I. Friday's	64	Bahama Breeze
7	Ruby Tuesday	65	Abuelo's
8	Buffalo Wild Wings Grill & Bar	66	Rock Bottom Restaurant & Brewery
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14	LongHorn Steakhouse	72	Damon's Grill
15	California Pizza Kitchen	73	Gordon Biersch Brewery Restaurant
16	Carrabba's Italian Grill	74	El Chico Cafe
17	Romano's Macaroni Grill	75	Lucille's Smokehouse Bar-B-Que
18	O'Charley's	76	Quaker Steak & Lube
19	Logan's Roadhouse	77	Cheeseburger in Paradise
20	Famous Dave's	78	Bennigan's Grill & Tavern
21	BJ's Restaurant & Brewhouse	79	Wow Cafe & Wingery
22	On The Border Mexican Grill & Cantina	80	Tony Roma's
23	Mimi's Cafe	81	ESPN Zone
24	Uno Chicago Grill	82	Chart House
25	Bonefish Grill	83	Fatz Cafe
26	Maggiano's Little Italy	84	Ted's Montana Grill
27	Carino's Italian	85	Cantina Laredo
28	Hard Rock Cafe	86	Bugaboo Creek Steak House
29	McCormick & Schmick's	87	Old Spaghetti Factory, The
30	Joe's Crab Shack	88	Uncle Julio's
31	Claim Jumper	89	Granite City Food & Brewery
32	Ninety Nine Restaurants	90	Kona Grill
33	Cheddar's Casual Cafe	91	Don Pablo's
34	Houlihan's	92	Landry's Seafood House
35	Johnny Rockets	93	Daily Grill
36	Benihana	94	Sullivan's Steakhouse
37	Dave & Buster's	95	Carlos O'Kelly's
38	Chevys Fresh Mex	96	Mellow Mushroom
39	Lone Star Steakhouse & Saloon	97	Texas Land & Cattle Steak House
40	Old Chicago Restaurants	98	House of Blues
41	Champps Entertainment Inc.	99	Cheeburger Cheeburger
42	Buca di Beppo	100	Black-eyed Pea
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44	Beef 'O' Brady's		
45	Bertucci's Italian Restaurant		
46	Max & Erma's		
47	El Torito		
48	Elephant Bar Restaurant		
49	Rainforest Cafe		
50	Miller's Ale House		
51	Yard House		
52	Legal Sea Foods		
53	Islands Fine Burgers & Drinks		
54	Fox and Hound English Pub & Grille		
55	Smokey Bones Bar & Fire Grill		
56	Brio Tuscan Grille		
57	Bubba Gump Shrimp Co. Restaurant & Market		
58	Bravo! Cucina Italiana		

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Restaurant chains included in this study (concluded)

Midscale Chains

1	Pappas Bar-B-Q
2	Perkins Restaurant & Bakery
3	Perko's Cafe Grill
4	Ram's Horn Family Restaurant
5	Original Pancake House, The
6	Olga's Kitchen
7	Kings Family Restaurants
8	LaRosa's Pizzeria
9	Le Peep
10	Marie Callender's Restaurant & Bakery
11	Rib Crib BBQ & Grill
12	Ruby's Diner
13	Valentino's
14	Village Inn
15	Waffle House
16	Winger's Grill & Bar
17	Steak n Shake
18	Sonny's Real Pit Bar-B-Q
19	Shari's Restaurants
20	Shoney's
21	Silver Diner
22	Johnny's New York Style Pizza
23	Jim 'N Nick's Bar-B-Q
24	Country Kitchen
25	Country Market Restaurant & Buffet, The
26	Country Pride
27	Cracker Barrel Old Country Store
28	Coco's Bakery Restaurant
29	Carrows Restaurants
30	Big Boy
31	Bill Miller Bar-B-Q
32	Black Bear Diner
33	Bob Evans
34	Denny's
35	Dickey's Barbecue Pit
36	Huddle House
37	IHOP
38	Iron Skillet
39	JB's Restaurants
40	Friendly's
41	First Watch
42	Eat'n Park
43	Egg & I Breakfast & Lunch
44	Elmer's
45	Bakers Square

Fine Dining Chains

1	Ruth's Chris Steak House
2	Roy's Restaurants
3	Shula's Steak House
4	Smith & Wollensky
5	Texas de Brazil Churrascaria
6	SushiSamba
7	Palm Restaurant
8	Oceanaire Seafood Room
9	Fleming's Prime Steakhouse & Wine Bar
10	Del Frisco's Double Eagle Steak House
11	Fogo de Chão
12	Melting Pot
13	Nobu
14	Morton's The Steakhouse
15	Capital Grille, The

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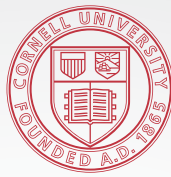
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