

CUISINE

18.1 Regional Cuisine

Virtually every city and state in America has a dish that is its culinary signature.

The following are some cuisines and dishes for which states are noted (sources: *USA Today*, *Go*, and various local media sources):

- Alabama: Vegetable plate
- Alaska: King salmon
- Arizona: Chimichanga
- Arkansas: Catfish
- California: Fresh, seasonal organic vegetables
- Colorado: Lamb chops
- Connecticut: Whole clam bellies
- Delaware: French fries sprinkled with salt and malt vinegar
- Florida: Key lime pie, fresh seafood at local fish shacks, Floribbean cuisine
- Georgia: Peach cobbler
- Hawaii: Grilled mahi-mahi
- Idaho: Baked russet potato
- Illinois: Corn dogs
- Indiana: Perch
- Iowa: Grilled pork chops
- Kansas: Fried chicken
- Kentucky: Corn pudding
- Louisiana: Crawfish
- Maine: Lobster roll
- Maryland: Steamed blue crabs
- Massachusetts: New England clam chowder
- Michigan: Cherry pies
- Minnesota: Walleye
- Mississippi: Pecan pie
- Missouri: Prime rib
- Montana: Rainbow trout
- Nebraska: Strip steak
- Nevada: All-you-can-eat buffets, celebrity-chef steakhouses
- New Hampshire: New England boiled dinner
- New Jersey: Diner fare

- New Mexico: Enchiladas
- New York: Reuben sandwich
- North Carolina: Grilled quail
- North Dakota: Cinnamon rolls
- Ohio: German chocolate cake
- Oklahoma: Chicken-fried steak
- Oregon: Marionberry cobbler
- Pennsylvania: Shoo-fly pie
- Rhode Island: Jonnycakes
- South Carolina: Shrimp and grits
- South Dakota: Buffalo rib-eye steak
- Tennessee: Buttermilk biscuits
- Texas: Chili con carne; Tex-Mex cuisine
- Utah: Brownie chocolate sundae
- Vermont: Pancakes and maple syrup
- Virginia: Country hams
- Washington: Olympia oysters
- West Virginia: Ramps (wild onions)
- Wisconsin: Grilled bratwurst slathered with brown mustard; fried cheese curds
- Wyoming: Western breakfast

The following are some local specialties (sources: *Forbes*, *Sky Magazine*, *USA Today*, and various local media sources):

- Albuquerque, NM: Blue corn enchiladas, green chili sauce
- Atlanta, GA: Pot likker
- Baltimore, MD: Maryland crabs
- Boston, MA: Indian pudding, baked beans, surf & turf tacos, scrod
- Buffalo, NY: Buffalo wings
- Charleston, SC: Creamy grits; shrimp and grits
- Chicago, IL: Italian beef sandwiches, hot dogs, deep dish pizza
- Cincinnati, OH: Double-decker sandwich; Cincinnati chili
- Dallas, TX: Barbeque brisket
- Indianapolis, IN: Port tenderloin sandwiches
- Kansas City, MO: Fried chicken dinner, barbecue
- Key West, FL: Key lime pie
- Los Angeles, CA: Fish tacos
- Louisville, KY: Hot Brown
- Memphis, TN: Pulled pork sandwich
- Miami, FL: Stone Crabs, Key Lime pie, Cuban sandwiches
- Milwaukee, WI: Frozen custard
- Mobile, AL: West Indies salad
- Nashville, TN: Ham and red-eye gravy
- New Orleans, LA: Oyster loaf, jambalaya, gumbo, boiled crawfish
- New York, NY: Pastrami sandwich, pizza, bagels

- Philadelphia, PA: Cheese steak sandwich
- Portland, OR: Oyster stew
- San Diego, CA: Fish tacos
- San Francisco, CA: Sourdough bread
- Seattle, WA: Salmon
- Tampa, FL: Cubano (Cuban sandwich)
- Tucson, AZ: Chimichanga

The following are popular regional flavor profiles (source: *Nation's Restaurant News*):

Midwest

- American cheese
- Cherry
- Corned beef
- Italian beef
- Italian sausage
- Ranch

South

- Catfish
- Crawfish
- Key lime pie
- Pecan
- Queso
- Sweet tea

Northwest

- Anchovy
- Eggplant
- Ginger ale
- Iced coffee
- Lobster
- Mesclun
- Parmigiana
- Plum tomatoes
- Veal
- Ziti

West

- Avocado
- Burrito
- Cabbage
- Cilantro
- Green chile
- Latte
- Sourdough
- Tostada
- Zucchini

18.2 Ethnic Cuisine

Global Palates, Ethnic And Flavors In America, published in August 2015 by the National Restaurant Association (www.restaurant.org), reported adult consumption of ethnic and regional cuisine as follows:

	> Once A Month	A Few Times A Year
• Italian:	62%	25%
• Mexican:	50%	30%
• Chinese:	35%	42%
• Regional American:	29%	27%
• Mediterranean:	17%	23%
• Sushi/Sashimi:	13%	17%
• Fusion:	12%	24%
• Japanese (other than sushi):	12%	27%

• Regional ethnic:	11%	23%
• Spanish:	8%	22%
• Middle Eastern:	8%	35%
• Southeast Asian:	8%	15%
• Belgian:	7%	25%
• Thai:	7%	16%
• German:	6%	30%
• French:	6%	26%
• Vietnamese:	6%	10%
• Greek:	5%	24%
• Indian:	5%	12%
• Latin American/Nuevo Latino:	5%	43%
• Caribbean:	4%	16%
• Korean:	3%	7%
• Russian/Eastern European:	3%	12%
• Peruvian:	2%	10%
• Scandinavian/Nordic:	1%	8%
• Brazilian/Argentine:	1%	7%
• Ethiopian:	1%	1%

Other findings of the study are as follows:

- Italian, Mexican and Chinese are the top three cuisines in terms of familiarity, trial, and frequency of eating.
- Ethiopian, Brazilian/Argentinian, and Korean are the three least known cuisines.
- Cuisines most commonly eaten on-premises in restaurants are sushi, Thai, Vietnamese, Brazilian/Argentinian, Greek, and Southeast Asian.
- Chinese is by far the most common cuisine for restaurant takeout and delivery, followed by Mexican, and Italian.
- Restaurants are the primary point of access for trying new cuisines, as well as the source where frequent eaters typically get their ethnic food.
- Eighty-five percent (85%) of consumers say they prefer to eat ethnic cuisine in a restaurant focused on that cuisine.
- Eighty percent (80%) consumers eat at least one ethnic cuisine per month.
- Seventy-five percent (75%) of consumers say they like it when restaurants with mainstream menus also serve ethnic cuisine.
- Sixty-six percent (66%) of consumers eat a wider variety of ethnic cuisines now than five years ago.
- Fifty-six percent (56%) of consumers customize ethnic cuisine dishes to fit their taste.
- Forty-three percent (43%) of consumers say the ethnic foods they like to eat are tied to their ancestry or heritage.
- Twenty-nine percent (29%) of consumers tried a new ethnic cuisine in the last year.

- Twenty-five percent (25%) of consumers like trying unconventional ingredients like snails, brains, or ants.
- Seventeen percent (17%) of consumers eat seven or more cuisines on a monthly basis.

“Some of the trendiest cuisines in the United States are still unknown to many Americans who continue to do most of their culinary adventuring within the ‘big three’ cuisines of Italian, Chinese, and Mexican.”

Nation’s Restaurant News, 9/14/15

According to Mintel (www.mintel.com), ethnic foods garner \$75 billion annually in the United States. Italian, Mexican, Chinese, Pan-Asian, and Japanese cuisine were found by Mintel to be the most popular ethnic foods, with 66.6% of respondents to a Mintel survey saying authenticity was their top expectation when it comes to ethnic foods.

A recent survey by The Harris Poll (www.theharrispoll.com) asked adults their favorite types of ethnic food. Responses were as follows:

- Italian: 28%
- Mexican: 24%
- Chinese: 22%
- Japanese: 7%
- Thai: 5%
- Indian: 3%
- Cajun: 2%
- Other: 8%

According to The NPD Group (www.npd.com), the following are the 10 fastest-growing ethnic cuisines on restaurant menus:

- Cuban
- Asian
- Shanghai
- Tuscan
- Mandarin
- Mediterranean
- Hong Kong
- Thai

- Japanese
- Italian

18.3 Market Resources

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

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700.
(www.npd.com)

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DAYPARTS

19.1 Daypart Spending and Traffic

According to a May 2015 report by Datassential (www.datassential.com), restaurant sales are distributed by daypart as follows:

- Breakfast: 20%
- a.m. snack: 5%
- Lunch: 38%
- p.m. snack: 7%
- Dinner: 27%
- Late night: 3%

The NPD Group (www.npd.com) assesses the distribution of total restaurant traffic, including takeout and delivery, as follows:

- Breakfast: 21%
- Lunch: 34%
- Dinner: 31%
- Snacks: 14%

Various assessments of restaurant patrons recognize that few eat the traditional three meals each day. Consumers increasingly eat one or two formal meals and snack throughout the day. Snacks are discussed in Chapter 71 of this handbook.

19.2 Breakfast

According to NPD, the breakfast category is a \$50 billion market, with more than 12.5 billion visits to restaurants at breakfast time. Overall, 21% of all restaurant visits are for breakfast. Breakfast/morning meal visits grew by 5% in the 12-month period ending June 2015.

“Breakfast is the fastest-growing foodservice daypart and is accelerating.”

The NPD Group, 12/21/15

Sixty-three percent (63%) of all restaurants serve breakfast, according to Datassential. By segment, the percentages that do so are as follows:

- Quick-service: 74%
- Fast-casual: 59%
- Casual-dining: 52%
- Fine-dining: 4%

Quick-service restaurants (QSRs) garner 80% of all morning meal visits, according to The NPD Group.

A March 2015 assessment by Sandelman & Associates (www.sandelman.com) reported the breakfast marketshare distribution among QSRs as follows:

- McDonald's: 29%
- Starbucks: 21%
- Dunkin' Donuts: 12%
- Carl's Jr. and Hardee's: 3%
- Chick-fil-A: 3%
- Taco Bell: 2%
- Subway: 2%

Technomic's (www.technomic.com) *Breakfast Consumer Trend Report* found the following trends for breakfast day-part patronage:

- Limited-service breakfast customers place high importance on value menus, breakfast sandwiches and portability, while full-service customers are most interested in variety, all-day breakfast options and signature meal offerings.
- Coffee is key: 64% of consumers drink coffee at breakfast; 54% of these consumers prefer a restaurant that offers free coffee refills; and 30% say that they are loyal to concepts that serve their preferred brand of java.
- Consumers link breakfast with health: 63% of consumers feel it is unhealthy to skip breakfast; open-ended data shows that many consumers want more healthful breakfast options.

The top items consumed at breakfast are as follows (source: Datassential):

	Pct. Who Have Eaten		Away From
	In Past 2 Weeks	At Home	Home
• Cold cereal:	23%	94%	6%
• Eggs:	23%	77%	23%
• Breakfast sandwich:	11%	52%	48%
• Bacon:	11%	73%	27%
• Sausage:	10%	66%	34%
• Yogurt:	10%	86%	14%
• Oatmeal:	10%	90%	10%
• Fruit/fruit cup:	9%	85%	15%
• Pancakes:	9%	65%	35%
• Bagel:	9%	81%	19%

• Breakfast potatoes:	7%	53%	47%
• Omelet:	6%	67%	33%
• French toast:	6%	77%	23%
• Waffles:	6%	75%	25%
• Muffin:	5%	73%	27%

19.3 Lunch

Lunch accounts for 34% of restaurant visits. According to The NPD Group, lunch visits to restaurants increased 1% year-over-year in the 12-month period ending June 2015.

When adults were asked in a survey where they usually had lunch, responses were as follows (source: *USA Today*):

• Home:	48%
• Desk at work:	32%
• Restaurant:	6%
• Car:	5%
• Other:	9%

The NPD Group reports that 60% of all lunches are prepared at home. Another 32% of lunch meals are eaten at school or work, as takeout, eaten on-the-run, or skipped altogether. Only 8% of lunch meals are eaten at a restaurant.

Although lunch comprises the largest percentage of restaurant visits, at 34%, lunch traffic has been on the decline for several years. The decline is attributed, in large part, to workers having less time for lunch during the workday; 81% of workers say they have less time for lunch because of their work schedule or recent increases in their workload.

“Once upon a time, visiting a restaurant [for lunch] meant an hour break from work, and for some it stretched to making deals over three martinis. Today, the reality lies in stark contrast.”

Nation’s Restaurant News, 12/8/15

By restaurant category, lunch traffic at restaurants is distributed as follows (source: The NPD Group):

- Hamburger: 28%
- Other sandwich: 10%
- QSR pizza: 7%
- QSR Mexican: 5%
- Mid-scale varied menu: 4%
- QSR varied menu: 4%
- Casual-dining bar and grill: 3%
- Chicken: 3%
- Convenience stores: 3%
- Deli: 3%
- QSR Asian: 3%
- Casual-dining varied menu: 2%
- Family style: 2%
- All other: 22%

Tacos, deli sandwiches, and combo meals have gained in popularity during lunchtime. And like the restaurant industry as a whole, more consumers are requesting more healthful fare for their midday meals, with lower calorie meals being the most sought after for lunch.

19.4 Dinner

Second only to lunchtime restaurant visits, dinner accounts for 31% of patronage at restaurants. Year-over-year visits, however, have been on the decline for several years. The NPD Group reported that visits to restaurants for dinner dropped 2% year-over-year in the 12-month period ending June 2015.

National Eating Trend, by The NPD Group, found the dinner daypart suffered a per capita drop of 15 fewer restaurant dinners compared to in-home suppers over the past decade.

Dinner accounts for 27% of restaurant sales. But the percentage varies by sector. The daypart accounts for slightly over one-half of casual-dining sales and 64% of fine-dining sales, according to Datassential.

The distribution of restaurant traffic for the dinner daypart, by customer age, is as follows (source: The NPD Group):

	Supper Meal Occasions	Share of Traffic
• 18-to-31:	66	28%
• 32-to-43:	63	19%
• 44-to-51:	60	20%
• 52-to-61:	56	16%
• 62 and older:	49	17%

In the short term, demographic trends do not bode well for growth in dinner traffic at restaurants, according to *A Look Into The Future of Foodservice*, a report by The NPD Group. The report found those ages 18-to-49, the most frequent age group of

supper-time diners, were the most impacted by the economic downturn and have yet to increase their dinner occasions since cutting back. Though older consumers have increased their restaurant dinner occasions, they haven't offset the losses from the cutbacks by their younger counterparts.

Among patrons dining out for supper, the following are the primary reasons they select a restaurant for dinner (sources: Mintel and *Nation's Restaurant News*):

- Want to order something great: 59%
- Want to satisfy my hunger: 35%
- Want to treat myself to a big meal: 25%
- Want to eat a healthful meal: 23%
- Cheap items on the menu: 9%
- Want a meal that won't fill me up too much: 9%
- None of the above: 7%

Technomic found that 71% of consumers skip dinner at least sometimes, primarily because of the lack of hunger or eating a late lunch instead of dinner.

19.5 Late-Night

Some family-dining chains such as Denny's, IHOP, Steak 'n Shake, and Waffle House have long had late-night service. Several years ago, many quick-service restaurants began operating with extended hours. More than 95% of McDonald's restaurants now have extended hours; several thousand are open 24 hours. More recently, casual-dining chains have been extending operating hours.

According to Technomic, late-night hours appeal to patrons of various age demographics as follows:

- 18-to-24: 66%
- 25-to-34: 56%
- 35-to-44: 50%
- 45-to-54: 48%
- 55 and older: 43%

At under 5% of restaurant visits, the late-hour daypart presents opportunities for innovative operators.

TOP RESTAURANT FRANCHISEES

47.1 Market Leaders

Annually, franchising.com compiles a list of the largest multi-unit franchise companies. Based on total unit count and brands in operation, the following were the Top Restaurant Franchisees in 2015:

Company	Units	Brands
• NPC International:	1,390	Pizza Hut, Wendy's
• Target Corp:	1,183	Cold Stone Creamery, Pizza Hut, Jamba Juice
• Carrols Restaurant Group:	650	Burger King
• Flynn Restaurant Group:	640	Applebee's, Taco Bell
• Dhanani Group/Houston Foods:	540	Burger King, Popeyes Louisiana Kitchen
• Aramark:	532	Ben & Jerry's Scoop Shop, Chick-fil-A, Chili's, Cosi, Denny's, Dunkin' Donuts, Einstein Bros. Bagels, Erbert & Gerbert's, the Extreme Pita, IHOP, Jack in the Box, KFC, Mcalister's Deli, Moe's Southwest Grill, Noble Roman's, Papa John's Pizza, Pinkberry, Pizza Hut, Qdoba Mexican Grill, Quiznos, Raising Cane's Chicken Fingers, Sbarro, Seattle's Best Coffee, Subway, Taco Bell, Tim Hortons, Togo's, Villa Pizza, Wendy's, Jamba Juice, Which Wich, Quaker Steak & Lube, Freshii, Mooyah Burgers & Fries, Panda Express, Salad Creations
• Army & Air Force Exchange Services:	473	Arby's, Blimpie, Burger King, Church's Chicken, Cinnabon, Domino's Pizza, Einstein Bros. Bagels, Godfather's Pizza, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco Bell, Taco John's, Wing Zone, Charley's Grilled Subs

• Sun Holdings:	453	Burger King, Popeyes Louisiana Kitchen, Krispy Kreme, Cici's, Arby's, T-mobile, Golden Corral
• HMShost Corp:	393	Baja Fresh, Blimpie, Burger King, Chick-fil-A, Chili's, Cinnabon, Cold Stone Creamery, Dunkin' Donuts, Einstein Bros. Bagels, Godfather's Pizza, the Great American Bagel, Great Steak & Potato Company, Johnny Rockets, Kelly's Cajun Grill, KFC, La Salsa, Moe's Southwest Grill, Nathan's Famous, Pinkberry, Pizza Hut, Popeyes Louisiana Kitchen, Quiznos, Ranch One, Romano's Macaroni Grill, Roy Rogers, Ruby's Diner, Salsarita's, Sbarro, Steak 'N Shake, Subway, Villa Pizza, Yeung's Lotus Express, Jamba Juice, Smashburger, Famous Famiglia, Sonny Bryan's Salad Creations, Smokehouse, Max & Erma's
• Tacala:	384	Pizza Hut, Sonic Drive-in, Taco Bell
• Rottinghaus Company:	382	Subway
• Sodexo:	378	Baja Fresh, Blimpie, Burger King, Carl's Jr., Chester's, Chick-fil-A, Einstein Bros. Bagels, Godfather's Pizza, KFC, Mcalister's Deli, Moe's Southwest Grill, Papa John's Pizza, Pizza Hut, Quiznos, Seattle's Best Coffee, Subway, Taco Bell, Tim Hortons, Wow Cafe & Wingery, Jamba Juice, Pj's Coffee of New Orleans, Nrgize Lifestyle Cafe, Quaker Steak & Lube, Erbert & Gerbert's, Planet Sub
• Pilot Travel Centers:	369	Arby's, Carvel, Cinnabon, Huddle House, KFC, Moe's Southwest Grill, Pizza Hut, Subway, Taco Bell, Wendy's, Dairy Queen
• Muy Brands:	365	Pizza Hut, Taco Bell, Wendy's
• Manna Inc.:	361	Wendy's, Chili's, Fazoli's, Perkins Restaurant & Bakery
• Boddie-Noell Enterprises:	330	Hardee's

• United States Beef Corp:	327	Arby's, Taco Bueno
• Harman Management Corp:	307	A&W, KFC, Long John Silver's, Taco Bell, Pizza Hut
• ADF Companies:	303	Pizza Hut
• Apex Restaurant Management:	300	KFC, Long John Silver's, Taco Bell
• Loves Travel Stops:	300	Arby's, Godfather's Pizza, Subway
• Strategic Restaurants Acq. Co.:	291	Burger King
• Wilcohes:	280	Arby's, Dunkin' Donuts, Godfather's Pizza, Subway, Wendy's
• KBPBP Foods:	276	KFC, Taco Bell, Long John Silver's
• K-MAC Enterprises:	276	KFC, Taco Bell
• Mason-Harrison-Ratliff Enterprises:	267	Sonic Drive-in
• Richard Lawlor:	263	Dunkin' Donuts
• Southern California Pizza:	262	Pizza Hut
• The Covelli Family Ltd.:	260	Panera Bread
• JIB Management:	255	Jack in the Box
• Hess Corp:	251	Burger King, Godfather's Pizza, Quiznos:
• Fugate Enterprises:	245	Pizza Hut, Taco Bell
• Quality Dining:	214	Burger King, Chili's
• D L Rogers Corp:	210	Sonic Drive-in
• The Pantry:	210	Chester's, Church's Chicken, Little Caesars Pizza, Quiznos, Subway, Dairy Queen
• Marlu Investment Group:	205	Arby's, Church's Chicken, TGI Fridays, Jack in the Box, Little Caesars Pizza, Sizzler, Captain D's, Sears Outlets & Appliance Stores
• TA Operating:	201	Burger King, Knights Inn, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco Bell, Tim Hortons
• Servus!:	183	Denny's, Long John Silver's, Wendy's, Grandy's, Papa John's Pizza
• Charter Foods:	177	A&W, Long John Silver's, Taco Bell
• JRN:	177	KFC, Pizza Hut
• Sizzling Platter:	176	Little Caesars Pizza, Sizzler
• Kmart:	175	Little Caesars Pizza
• Cedar Enterprises:	170	Burger King, Wendy's
• Compass Group USA:	156	Bojangles', Burger King, Einstein Bros. Bagels, Jerry's Subs & Pizza, Johnny Rockets, Moe's Southwest Grill, Papa John's Pizza, Pinkberry, Pizza Hut, Quiznos, Rollerz,

		Subway, Taco Bell, Wendy's, Jamba Juice, Uno Due Go
• Pacpizza:	156	Pizza Hut
• Desert De Oro Foods:	155	Pizza Hut, Taco Bell, KFC, Long John Silver's
• Restaurant Mgt. Co. of Wichita:	155	Long John Silver's, Pizza Hut
• B & B Consultants:	153	Sonic Drive-in
• Fourteen Foods:	153	DQ Grill & Chill, Dairy Queen Braziers
• Davco Restaurants:	153	Wendy's
• PJ United:	152	Papa John's Pizza
• Interfoods of America:	140	Popeyes Louisiana Kitchen
• Chalak Mitra Group:	140	KFC
• Celebration Restaurant Group:	139	Pizza Hut, Taco Bell
• Valenti Management:	139	Chili's, Wendy's
• RMH Franchise Corp:	137	Applebee's
• RPM Pizza:	135	Domino's Pizza
• Doherty Enterprises:	134	Applebee's, Panera Bread
• Apple Gold:	132	Applebee's
• Summit Restaurant Group:	131	A&W, Wingstreet, Pizza Hut, Long John Silver's
• America's Pizza Co.:	128	Pizza Hut
• Cafua Management Company:	128	Dunkin' Donuts, Dunkin' Donuts/Baskin-Robbins:
• Las Vegas Pizza:	127	Pizza Hut
• Palo Alto:	124	KFC, Pizza Hut, Taco Bell
• Rage:	123	Pizza Hut
• Marchelle Stewart:	123	KFC
• Wisconsin Hospitality Group:	121	Applebee's, Pizza Hut
• Bajco:	121	Papa John's Pizza
• JEM Restaurant Group:	119	Pizza Hut, Taco Bell
• The Scrivanos Group:	118	Dunkin' Donuts, Dunkin' Donuts/Baskin-Robbins:
• South American Restaurants Corp.:	117	Church's Chicken
• Neighborhood Restau. Partners:	115	Applebee's
• Briad Restaurant Group:	114	TGI Fridays, Wendy's
• Dipasqua Enterprises:	114	Subway
• Western Reserve Restaurant Mgt.:	113	Wendy's
• Randolph S Katz:	111	Midas
• Daland Corp:	110	Pizza Hut
• Goldco:	109	Burger King
• Pepper Dining:	104	Chili's
• Magic Burgers:	103	Burger King
• Brij Agrawal:	102	Subway

• Northeast Foods:	101	Burger King
• Paradigm Investment Group:	98	Hardee's
• Luhn Food System:	97	KFC, Taco Bell, Long John Silver's, Hurricane Grill & Wings
• Tanweer Ahmed:	97	KFC, Taco Bell
• Boom:	97	Sonic Drive-in
• A3H Foods LP:	95	Jack in the Box
• Houston Foods:	95	Burger King
• William B. Graves:	95	Domino's Pizza
• Burgerbusters:	94	Pizza Hut, Taco Bell
• John Boike:	94	Subway

47.2 Market Resources

Franchise Update Media Group, P.O. Box 20547, San Jose, CA 95160.
(408) 402-5681. (www.franchising.com)

TOP FRANCHISERS

48.1 Overview

According to *Nation's Restaurant News* (June 2015), 139 of the Top 200 chain restaurants offer franchises. Combined, these chains have 155,136 franchised units. This represents 73% of the units operated by the Top 200 chains. Sixty-one (61) of the Top 200 chains do not offer franchises.

48.2 Franchised Units

The number of franchised units and percentage of total units that are franchised for the Top 200 chains are as follows:

	Franchised Units	Pct. of Total
• Subway:	26,530	100%
• McDonald's:	12,836	89%
• Dunkin' Donuts:	8,047	99%
• Pizza Hut:	7,337	93%
• Burger King:	7,077	99%
• 7-Eleven:	6,390	87%
• Taco Bell:	4,995	84%
• Wendy's:	4,895	85%
• Domino's:	4,690	93%
• Starbucks Coffee:	4,659	39%
• Dairy Queen:	4,444	99%
• KFC:	4,164	95%
• Little Caesars Pizza:	3,528	86%
• Sonic America's Drive-In:	3,127	89%
• Papa John's Pizza:	2,564	79%
• Baskin-Robbins:	2,478	99%
• Arby's:	2,286	71%
• Jimmy John's Gourmet Sandwiches:	2,071	98%
• Chick-fil-A:	1,871	100%
• Applebee's Neighborhood Grill & Bar:	1,847	99%
• Jack in the Box:	1,818	80%
• Popeyes Louisiana Kitchen:	1,805	96%
• IHOP:	1,568	99%
• Denny's:	1,435	90%

• Hardee's:	1,370	77%
• Papa Murphy's Take 'N' Bake Pizza:	1,342	94%
• Auntie Anne's:	1,154	99%
• Quiznos:	978	99%
• Cold Stone Creamery:	912	99%
• Church's Chicken:	907	78%
• Tim Hortons:	881	99%
• Jersey Mike's Subs:	823	96%
• Long John Silver's:	815	100%
• Firehouse Subs:	808	96%
• Five Guys Burgers and Fries:	785	67%
• Carl's Jr.:	758	66%
• Waffle House:	750	41%
• Circle K:	706	18%
• A&W All American Food:	674	99%
• Wingstop:	652	97%
• Buffalo Wild Wings Grill & Bar:	579	55%
• Marco's Pizza:	578	100%
• Moe's Southwest Grill:	577	99%
• Smoothie King:	568	96%
• Godfather's Pizza:	553	97%
• Zaxby's:	546	83%
• Jamba Juice:	543	67%
• Hungry Howie's Pizza:	533	97%
• Culver's:	521	99%
• Dickey's Barbecue Pit:	506	98%
• Chili's Grill & Bar:	435	34%
• CiCi's Pizza:	433	96%
• Tropical Smoothie Cafe:	410	100%
• Charley's Grilled Subs/Charleys Philly Steaks:	398	89%
• Golden Corral:	392	78%
• Taco John's:	383	97%
• Round Table Pizza:	369	84%
• Bojangles' Famous Chicken 'n Biscuits:	368	59%
• Einstein Bros. Bagels:	360	47%
• Huddle House:	359	97%
• Qdoba Mexican Grill:	324	51%
• Wienerschnitzel:	322	100%
• Checkers:	321	63%
• Schlotzsky's:	309	89%
• TGI Fridays:	308	61%
• McAlister's Deli:	293	87%
• Penn Station East Coast Subs:	286	100%
• Perkins Restaurant & Bakery:	260	66%

• El Pollo Loco:	243	59%
• Del Taco:	242	44%
• Captain D's Seafood Kitchen:	238	47%
• Beef 'O' Brady's Family Sports Pub:	191	96%
• Pizza Ranch:	181	96%
• Johnny Rockets:	175	86%
• Krispy Kreme Doughnuts:	167	60%
• Baja Fresh Mexican Grill:	159	92%
• Hooters:	153	45%
• Sbarro, the Italian Eatery:	149	42%
• Rally's Hamburgers:	145	49%
• Friendly's:	144	51%
• Famous Dave's:	136	73%
• Caribou Coffee:	129	32%
• Krystal:	127	36%
• The Melting Pot:	126	98%
• Smashburger:	122	42%
• Steak 'n Shake:	122	23%
• Freddy's Frozen Custard & Steakburgers:	121	90%
• Whataburger:	118	15%
• Sizzler:	110	87%
• Sonny's Real Pit Bar-B-Q:	109	92%
• Jason's Deli:	106	42%
• Big Boy/Frisch's Big Boy:	105	47%
• Outback Steakhouse:	105	14%
• Shoney's:	103	63%
• Fuddruckers:	102	59%
• Donatos Pizza:	100	66%
• Red Robin Gourmet Burgers & Brews:	99	20%
• Bruegger's Bagels:	98	35%
• Fazoli's:	88	42%
• Village Inn:	86	41%
• Panda Express:	75	4%
• Au Bon Pain:	74	35%
• Corner Bakery Cafe:	70	38%
• Texas Roadhouse:	70	16%
• Sarku Japan:	68	29%
• Cheddar's:	65	41%
• Black Bear Diner:	61	91%
• Ruth's Chris Steak House:	56	46%
• Carino's Italian:	55	56%
• Noodles & Company:	53	12%
• Raising Cane's Chicken Fingers:	51	25%
• Houlihan's:	44	58%

• Quaker Steak & Lube:	44	73%
• Uno Chicago Grill/Pizzeria Uno:	44	34%
• Twin Peaks:	39	68%
• Old Chicago:	38	39%
• Ruby Tuesday:	36	5%
• Chuck E. Cheese's:	32	59%
• Marie Callender's Restaurant & Bakery:	31	42%
• Logan's Roadhouse:	26	10%
• Bar Louie:	20	22%
• On the Border Mexican Grill & Cantina:	20	14%
• Taco Bueno:	19	11%
• California Pizza Kitchen:	17	8%
• Potbelly Sandwich Works:	17	5%
• La Madeleine Country French Cafe:	11	15%
• Benihana of Tokyo:	9	12%
• Pei Wei Asian Diner:	8	4%
• O'Charley's:	7	3%
• Taco Cabana:	7	4%
• Bonefish Grill:	5	2%
• Pollo Tropical:	5	4%
• Romano's Macaroni Grill:	5	3%
• Rubio's Fresh Mexican Grill:	4	2%
• Hard Rock Cafe:	3	4%
• Boston Market:	3	1%
• Zoes Kitchen:	3	2%
• P.F. Chang's China Bistro:	2	1%

48.3 Non-Franchising Chains

The following restaurant chains do not offer franchises:

- Bahama Breeze
- Barnes & Noble Cafe
- Bertucci's Italian Restaurant
- BJ's Restaurant & Brewhouse
- Bob Evans Restaurants
- Braum's Ice Cream and Dairy Stores
- Bravo! Cucina Italiana
- Brio Tuscan Grille
- Bubba Gump Shrimp Co.
- Buca di Beppo
- Cafe Rio Mexican Grill
- Carrabba's Italian Grill
- Casey's General Stores
- Chipotle Mexican Grill
- Chuy's
- Claim Jumper
- Costco
- Cracker Barrel Old Country Store
- Dave & Buster's
- Eat'n Park
- El Torito
- Fogo de Chao
- Frisco's Double Eagle Steak House
- Hard Rock Cafe
- HomeTown Buffet
- Houston's
- In-N-Out Burger
- J. Alexander's

- Joe's Crab Shack
- Legal Sea Foods
- LongHorn Steakhouse
- Luby's Cafeteria
- Maggiano's Little Italy
- Mastro's Steakhouse/Ocean Club
- McCormick & Schmick's
- Miller's Ale House
- Mimi's Cafe
- Morton's the Steakhouse
- Ninety Nine Restaurant & Pub
- Old Country Buffet
- Olive Garden
- Peet's Coffee & Tea
- Portillo's
- Rainforest Cafe
- Red Lobster
- Ryan's Grill, Buffet & Bakery
- Saltgrass Steak House
- Sam's Cafe (Walmart stores)
- Seasons 52
- Shari's Restaurants
- Sheetz
- Smokey Bones Bar & Fire Grill
- Stripes
- Sweet Tomatoes
- Target Cafe (Target stores)
- The Capital Grille
- The Cheesecake Factory
- The Habit Burger Grill
- Wawa
- White Castle
- Yard House

48.4 Market Resources

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