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

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Abstract
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Keywords
restaurants, electronic ordering, online ordering

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

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by Sheryl E. Kimes, Ph.D., and Philipp F. Laqué
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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.
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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.\(^3\)

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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

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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
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

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9 Technomic, *loc. cit.*

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.
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. 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.
### Fast Casual Chains

1. Panera Bread/Saint Louis Bread Co. 58. Pancho's Mexican Grill
2. Chipotle Mexican Grill 59. Shane's Rib Shack
3. Panda Express 60. Pat & Oscar's
4. Zaxby's 61. Leeann Chin
5. El Pollo Loco 62. Straw Hat Pizza
7. Jason's Deli 64. Counter, The
8. Five Guys Burgers and Fries 65. Salad Creations
9. Qdoba Mexican Grill 66. Nature's Table Café
10. Einstein Bros. Bagels

### QSR Chains

1. McDonald's
2. Subway
3. Burger King
4. Wendy's Old Fashioned Hamburgers
5. Starbucks
6. Taco Bell
7. Dunkin' Donuts
8. Pizza Hut
9. KFC
10. SONIC Drive-Ins
11. Arby's
12. Chick-fil-A
13. Jack in the Box
14. Domino's Pizza
15. Dairy Queen
16. Papa John's
17. Quiznos
18. Popeyes Louisiana Kitchen
19. Golden Corral
21. Little Caesars
22. Whataburger
23. Church's Chicken
24. Old Country Buffet/HomeTown Buffet
25. Long John Silver's
26. Bojangles' Famous Chicken 'N Biscuits
27. Culver's Frozen Custard
28. Papa Murphy's Take 'N' Bake Pizza
29. Jimmy John's Gourmet Sandwich Shop
30. CiCi's Pizza
31. Baskin-Robbins
32. Del Taco
33. White Castle
34. Fatburger
35. Sbarro
36. Dairy Queen
37. Tim Hortons
38. Jamba Juice
39. Arby's
40. Jimmy John's Gourmet Sandwich Shop
41. Burger King
42. Dunkin' Donuts
43. Papa Gino's Pizzeria
44. Papa Murphy's Take 'N' Bake Pizza
45. Jake's Pizza
46. Checkers Drive-In Restaurants
47. Sizzler
48. Godfather's Pizza
49. Auntie Anne's
50. Braum's Ice Cream & Dairy Stores
51. Rally's Hamburgers
52. Ponderosa/Bonanza
53. Caribou Coffee
54. Taco John's
55. Hungry Howie's Pizza
56. Souplantation & Sweet Tomatoes
57. Luby's
58. Wienerschnitzel
59. Potbelly Sandwich Shop
60. Piccadilly
61. Peet's Coffee & Tea
62. A&W All-American Food
63. Blimpie Subs & Salads
64. Fox's Pizza Den
65. Cinnabon
66. Charley's Grilled Subs
67. WesterN SizzliN
68. Jersey Mike's Subs
69. Peter Piper Pizza
70. Mazzio's Italian Eatery
71. Papa Gino's Pizzeria
72. Jet's Pizza
73. Smoothie King
74. Freshbys
75. Gatti's Pizza
76. TCBY
77. Coffee Bean & Tea Leaf, The
78. Carvel Ice Cream
79. Pizza Pro
80. Togo's Sandwiches
81. TacoTime
82. Nathan's Famous
83. Sarku Japan
84. Pizza Inn
85. Penn Station East Coast Subs
86. Ben & Jerry's
87. Furr's Family Dining
88. Rita's Ice
89. Tastee Freez
90. Villa Fresh Italian Kitchen
91. Pizza Ranch
92. Pinkberry
93. Tropical Smoothie Café
94. L&L Hawaiian Barbecue
95. Marco's Pizza
96. Häagen-Dazs
97. Rosati's Pizza
98. K&W Cafeterias
99. Lee's Famous Recipe Chicken

### Continued on next page
Appendix

Restaurant chains included in this study (continued)

Casual Chains
1. Applebee's Neighborhood Grill & Bar
2. Chili's Grill & Bar
3. Olive Garden
4. Red Lobster
5. Outback Steakhouse
6. T.G.I. Friday's
7. Ruby Tuesday
8. Buffalo Wild Wings Grill & Bar
9. Cheesecake Factory, The
10. Texas Roadhouse
11. Red Robin Gourmet Burgers
12. P.F. Chang's China Bistro
13. Hooters
14. LongHorn Steakhouse
15. California Pizza Kitchen
16. Carrabba's Italian Grill
17. Romano's Macaroni Grill
18. O'Charley's
19. Logan's Roadhouse
20. Famous Dave's
21. BJ's Restaurant & Brewhouse
22. On The Border Mexican Grill & Cantina
23. Mimi's Cafe
24. Uno Chicago Grill
25. Bonefish Grill
26. Maggiano's Little Italy
27. Carino's Italian
28. Hard Rock Cafe
29. McCormick & Schmick's
30. Joe's Crab Shack
31. Claim Jumper
32. Ninety Nine Restaurants
33. Cheddar's Casual Cafe
34. Houlihan's
35. Johnny Rockets
36. Benihana
37. Dave & Buster's
38. Chevys Fresh Mex
39. Lone Star Steakhouse & Saloon
40. Old Chicago Restaurants
41. Champs Entertainment Inc.
42. Buca di Beppo
43. Houston's
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

59. J. Alexander's
60. Saltgrass Steak House
61. Black Angus Steakhouse
63. Grand Lux Cafe
64. Bahama Breeze
65. Abuelo's
66. Rock Bottom Restaurant & Brewery
67. Pappadeaux Seafood Kitchen
68. Jimmy Buffett's Margaritaville
69. Charlie Brown's Steakhouses
70. Bar Louie
71. Il Fornaio
72. Damon's Grill
73. Gordon Biersch Brewery Restaurant
74. El Chico Cafe
75. Lucille's Smokehouse Bar-B-Que
76. Quaker Steak & Lube
77. Cheeseburger in Paradise
78. Bennigan's Grill & Tavern
79. Wow Cafe & Wingery
80. Tony Roma's
81. ESPN Zone
82. Chart House
83. Fatz Cafe
84. Ted's Montana Grill
85. Cantina Laredo
86. Bugaboo Creek Steak House
87. Old Spaghetti Factory, The
88. Uncle Julio's
89. Granite City Food & Brewery
90. Kona Grill
91. Don Pablo's
92. Landry's Seafood House
93. Daily Grill
94. Sullivan's Steakhouse
95. Carlos O'Kelly's
96. Mellow Mushroom
97. Texas Land & Cattle Steak House
98. House of Blues
99. Cheeburger Cheeburger
100. Black-eyed Pea

Concluded on next page
### 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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Vol. 11 No. 6 Hotel Guests' Reactions to Guest Room Sustainability Initiatives, by Alex Susskind, Ph.D. and Rohit Verma, Ph.D.
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