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The top restaurant chains, people, trends and technologies shaping the fast casual segment

Who's our #1?

(hint: It's real and fast.)







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Top 100: Fast casuals are growing up

Choosing the top brands and trends for the annual Fast Casual Top 100 Movers & Shakers is never an easy task, and this year—the 8th edition—was no exception. It seems that 2012 was a year of growth for many chains, and I don't just mean opening new stores or increasing revenues. From enhancing menus with healthy and innovative recipes to launching a variety



of technologies from mobile payments to marketing analytics, fast casual restaurateurs are proving that although it's still the newest kid on the block, it's growing up.

It's growing so quickly, in fact, that the entire restaurant industry continues to take notice and strive to pick up some of its luster. For example, casual dining chains, including Applebee's and Red Lobster, have launched fast casual lunch hours, while Taco Bell and Wendy's recently introduced fresher menu items and remodeled stores to provide a more upscale environment.

Our methodology for selecting the brands in this year's Top 100 Movers & Shakers allowed our readers to nominate the brands, an egalitarian approach we've taken before. Helping us evaluate the nominations for the ultimate ranking were former FastCasual.com editor Valerie Killifer, now head of marketing firm P-O-P Content, and Warren Solochek, vice president of NPD Group. We applied multiple criteria against the nominees, including innovation, growth, and contribution to the industry.

This year's Top 100 is dedicated to the fast casual brands leading the innovation and demanding the respect of their peers.

Thanks for reading.

Cherryh Butler Senior editor FastCasual.com

Table of Contents

- 4 Top 50 restaurants
- **16** Top 10 menu innovations
- **20** Top 20 people
- 28 Top 10 technology trends
- **31** Top 10 industry trends

2013 TOPIDO MOVERS & SHRKERS

RESTRURANT CHAINS

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Fazoli's

Although it was launched in 1988 as more of a quick-service restaurant, Fazoli's is now thriving in the fast casual sector. Under the leadership of CEO Carl Howard, the brand has undergone a rebranding and menu overhaul that has garnered significant attention, not only from the industry but also customers, who are visiting the brand in droves. In fact, sales in 2012 hit \$226 million, a 5.1-percent year-over-year increase, and both company and franchise restaurants posted 28 consecutive months of samestore sales growth (through November 2012). That's the longest sustained year-over-year sales gain in the company's 24-year history. The brand, which operates 216 units in 26 states, has been "sales positive" for 30 out of the last 31 months and eight consecutive quarters, Howard said.

Increased sales aren't the only goal on Howard's agenda. He also wants to grow the Fazoli's footprint; 2012 saw the opening of three new units, and Howard is planning to open another nine. Fazoli's, which has landed on our Top 100 four years in a row, operates not only traditional freestanding units with drive-thru service but also nontraditional locations, including c-stores, kiosks and in-line units.

All of those successes have helped Fazoli's take the top spot on our list, but we aren't the only member of the media that's impressed. In 2012, Fazoli's earned Zagat ratings for No. 1 in appearance, No. 2 overall and No. 4 in service, and Franchise Times named it as No. 10 on its list of 20 companies to watch.

Success, however, is not always about money and recognition, said Howard, who in 2012 guided Fazoli's to its first national charitable partnership. In conjunction with Feed the Children, Fazoli's launched a 17-city "Breadstick Tour" this past summer, promoting Feed the Children and raising more than \$50,000 for the organization. Also, Fazoli's in-house charitable fund, Seeds of Compassion Inc., hopes to reach the \$500,000-donation level by the end of 2013. Seeds of Compassion provides Fazoli's employees who are in crisis with financial grants. An annual golf scramble headed by Howard, along with donations from associates, funds the program.





2013 TOPIDO MOVERS & SHAKERS

McAlister's Deli

When Frank Paci took over as CEO of McAlister's Deli in 2010, his mission was to grow the concept. Mission accomplished. In Q4 of 2012, sales at company-owned restaurants were up 9.2 percent compared to the previous year, while sales at franchise restaurants were up by 8.2 percent. The 300-plus-unit chain, known for its signature



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sweet tea and fresh deli sandwiches made with premium ingredients, isn't focused only

on growing sales in existing units, but also is increasing the number of locations. It opened 12 units in 2012 and hopes to have another 20 open by the end of 2013.

The brand, owned by Atlanta-based private equity firm Roark Capital Group, also is focusing more on catering. In fact, catering was up by 3 percent in 2012, Paci said.



Freebirds World Burrito

The burrito chain known for its rock 'n' roll-themed restaurants has quadrupled in size since Tavistock Restaurants purchased it in 2007. In 2012, more than 30 new units popped up all over the nation, bringing the chain's total to more than 60. Freebirds is still expanding with plans for double-digit percentile growth by the end of 2013. That's no surprise, considering the chain touts freedom of choice when it comes to burritos and bowls, letting guests customize their meals using more than 40 freshly prepared ingredients, including grass-fed beef, hormone-free chicken, all-natural slow-roasted carnitas and hand-cut veggies. The brand boasts more than 35 trillion combinations. Rock out!





Firehouse seems to be smoking most of its competition: it grew by 98 restaurants in 2012, added 144 new franchisees and entered nine new markets. Under the direction of CEO Don Fox, the Jacksonville, Fla.-based chain also continues

growth outside the continental U.S., with seven restaurants already open in Puerto Rico and more planned to open there this year. Firehouse also plans to have a presence in Mexico by the end of the year and to be in Canada by 2014.

Overall, Firehouse is poised to open 100 new restaurants by the end of the year, with the ultimate goal of reaching 2,000 by 2020. If that's not impressive enough, the average unit volume increased by 12.7 percent, and overall system-wide sales grew by 35.2 percent. That's a lot of subs!

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Denver-based Chipotle is still enjoying its reputation as the king of fast casual, but it's not resting on its laurels. This past

year, the chain tested a variety of new menu items, including margaritas and tofu; updated its mobile app; and previewed a secret menu item called The Quesarito, a burrito wrapped in a cheese quesadilla. (It's not officially on the menu but has its own Facebook page.)



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Sure, Chipotle has caught some heat over the past few years since it was accused in 2006 of buying tomatoes grown on farms that treated workers unfairly, but that scandal hasn't really hurt its growth. It is up to nearly 1,500 locations, is still growing and at the end of 2012, made a commitment to buy only tomatoes grown on farms with at least a minimum wage and basic sound working conditions.



Freshii not only offers a healthy, custom-built alternative to fast food, but it also is rapidly expanding, with deals signed in 2012 for Colombia, China and Sweden, and with units already open in Dubai and Austria. That's in addition to its units in the U.S. and Canada, where CEO Matthew Corrin launched the concept at age 29 in 2005. Corrin, who made the list of Top 100 people this year as well as last year, has more than 50 units running now and plans to have 120 open by 2013.

Corrin brought the brand attention this year when he donned a fat suit and appeared on an episode of "Undercover Boss Canada" to interact with employees and to uncover where improvements could be made to maximize efficiency.

"'Undercover Boss' was such a great experience that I purchased my disguise and use it to check in on other stores around the world as I travel," Corrin said.



•. Penn Station : East Coast Subs

Penn Station East Coast Subs boasts a 99.9-percent success rate, according to its president Craig Dunaway. The Ohio-based chain, which opened in 1985, serves grilled sub sandwiches in its nearly 300 locations. It opened 21 restaurants in 2012, entering several new markets, including Chattanooga, Tenn.; Columbia, Mo.; Grand Rapids, Mich.; and Lansing, Mich.

Even more growth is on Dunaway's agenda over the next two years: He plans for more than 40 more units to open by the end of the year and is planning to add up to 45 in 2014.

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Climbing four spots higher from its No. 12 spot on last year's Top 100 is MOOYAH, a fast casual concept based in Texas that plays in the better-burger space. The chain doubled in size in 2012, reaching more than 50 units. Several new markets, including Oklahoma, Florida, Virginia, Latin America and the Middle East, are also on the chain's radar for 2013. Alan Hixon, VP of development, said the growth has



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been possible because of the restaurant's focus on high-quality ingredients and customizable menu options.

MOOYAH also connects with customers via technology, including a mobile app that allows them to order and pay for their food.

"Whether it's our ordering kiosks or mobile app, part of the MOOYAH model is dedicated to innovation, and we expect to make further technology enhancements in the future," Hixon said.



Bruegger's Bagels

With more than 300 bakeries open since the chain first launched nearly 30 years ago, Bruegger's Bagels is in the midst of a growth spurt. It opened nine new locations in 2012 and has plans to open at least 18 by the end of 2013. The chain known for its freshly baked, New York-style bagels also is gaining a reputation as a solid franchise investment. In fact, Franchise Business Review added it to its list of 2012 Top 50 Franchise Opportunities.



]: Zoës Kitchen

Since the first Zoës Kitchen opened in 1995, in downtown Birmingham, Ala., the chain has seen steady, double-digit growth across 12 states from Arizona to Virginia. It opened 18 units in 2012, bringing its total to more than 80. The Mediterranean café serves original recipes created by founder Zoë Cassimus, focusing on wholesome ingredients to make its chicken and steak kabobs, hummus, fresh salads and soups.

Zoës, which is similar to the word "life" in Greek, isn't focused only on the dinein experience; the chain recently launched "Fresh Take Tubs" for customers wanting healthy grab-and-go options. The tubs include easy-to-make recipes that use the restaurant's most popular sides and salads as key ingredients for dinner, parties and snack time.



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Wildflower Bread Company

When it comes to a good sandwich, everyone knows it's all about the bread, a concept Wildflower Bread Company has down pat. Each location produces about 600 loaves of bread and rolls daily, through a process that takes about 48 hours from start to finish.

It's not just the bread that sets this chain apart. It also cares about its communities; instead of throwing out leftovers, each restaurant donates them to help feed the needy. In the past two years, Wildflower has given more than \$500,000 in donated leftover bread and bakery items to help the impoverished.

That commitment, along with its goal to serve natural foods and handmade bread, has helped land Wildflower on the Top 100 for the past three years in a row.



12 Freakin' Unbelievable Burgers

Although Freakin' Unbelievable Burgers plays in the better-burger segment, the restaurant caters to a crowd on the go. It's the only national better-burger restaurant to have a drive-thru, where it pushes out many of its gourmet burgers. One of its top sellers is the Upper Crust Burger, which combines Boursin and gouda cheese, roasted garlic and onion jam and cucumbers. For its veggie-only customers, Freakin' offers grilled or deep-fried Portobello mushrooms in place of meat patties.

Having launched the brand just last year in Flint, Mich., founder Brent Skaggs already is rolling out a franchise program and plans to open five units by 2014.



plans to open 35 to 40 annually for at least the next three years. Talk about flexing your muscles; this concept is going big.

Giraffas

In these economic times, opening a restaurant is risky business, but founder and CEO Carlos Guerra was positive that Americans would fall in love with Giraffas, one of Brazil's fastest-growing fast casual concepts. The chain, which has more than 400 locations across Brazil and Latin America, made its U.S. debut in 2011, opening units in south Florida. Another 12 will open by 2014, and the growth spurt isn't stopping there. The chain, which is focused mainly on burgers, sandwiches and Brazilian comfort food, is also looking to expand outside Florida.

Muscle Maker Grill

With a goal of providing delicious yet healthy lunches to New Jersey residents, Rod Silva launched Muscle Maker Grill in 1995. He began franchising the now-65unit chain in 2009, when he partnered with veteran Arthur Gunther, former president of Pizza Hut. The partners now have more than 20 restaurants in development with

5 Garbanzo Mediterranean Grill

The past year has been one of growth for this chain, specializing in healthy Mediterranean fare. It not only opened its first franchised location, but it also gained an outside investor in private-equity firm Gemini Investors to help grow outside its home base of Colorado.

Founded in 2008 by Israeli native Alon Mor, Garbanzo has locations in Oklahoma and Texas. Mor also has plans for Orange County, Calif., and northern New Jersey and anticipates doubling the chain's 15 units by the beginning of 2014.



It may seem gutsy to open a restaurant that serves "100 percent plant-based food," but Veggie Grill seems to be getting it right. The Santa Monica-based chain recently secured \$20 million in funding to



17 Wingstop

With more than 550 locations open in the U.S. and Mexico, Wingstop has achieved nine consecutive years of same-store sales increases and opened 53 new locations in 2012. According to Technomic, 36 percent of the top 500 restaurant chains now offer wings, but the "Wing Experts" aren't worried. They served about 2 million wings on Super Bowl Sunday alone. And thanks to the introduction of Wingstop's first phone app and an increased focus on online ordering, online sales in 2012 increased 70 percent for the year to date.

18 Smashburger

Because Smashburger experienced such strong growth in 2011, observers might

expect the chain to be slowing down a bit. Nope. Growth continues to rev. The betterburger chain, launched in 2007, added 58 new locations globally in 2012, ending the year with 193 restaurants. (So far in 2013, that number is already above 200.)

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Under the direction of David Prokupek, chairman and CEO, the brand debuted last year in Calgary, Kuwait, Saudi Arabia and Costa Rica, and is targeting 30-percent unit growth with the addition of 50-60 openings planned for 2013.

19 Blaze Pizza

Since its launch in August 2011, this buildyour-own pizza company has flourished to 10 units. Elise and Rick Wetzel, co-founders of Wetzel's Pretzels, created the brand, but have a variety of impressive investors, including Tom Werner, co-owner of the Boston Red Sox, and Maria Shriver.

Of course, it all comes down to the pizza, which isn't an issue for Blaze. Each location

Blazing Onion

uses an open-hearth pizza oven that cooks pies in two minutes flat. Guests choose the cheese, sauce and toppings for their 11inch crusts for \$6.85.

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20 Blazing Onion

With a reputation for being technology-savvy, this Washington-based, better-burger chain allows its customers to order their meals via kiosk or guest-initiated, tableside iPads.

David Jones, CEO, and his wife have opened their fifth restaurant in as many years and believe their success is due in part to its service style — full-service lounge meets fast casual speed. Although technology speeds up wait times, Jones said, it mainly provides customers with the best possible service. It's their choice when it comes to ordering; they may use the technology or rely on the old-fashioned way of interacting with employees.

21 Cedars Woodfire Grill

Under the watchful eyes of Randy Gier, CEO of Pizza Inn and Pie Five, and his business partner Laurie Curtis, Cedars Woodfire Grill is gaining a following for not using freezers, fryers or microwaves. Instead, the chain uses a wood-fired grill, infusing natural flavors of its special blend of cedar, cherry and mesquite woods into its meats and vegetables. Did we mention everything is under \$10? The concept launched in 2011, in Plano, Texas, and a second opened in Frisco this year. A third is slated to open in May 2013 in Dallas. 2013 TOPIDO MOVERS & SHRKERS





Most people probably associate burgers with red meat, but at Burger 21, nearly 69 percent of sales come from non-beef patties, including the Black Bean, Ahi Tuna and Chicken Parmesan burgers.

The chain, founded by the owners of The Melting Pot Restaurants, even created an infographic highlighting how its guests are buying into its better burgers, especially its non-beef options.

Burger 21, which boasts 21 varieties of burgers, three all-beef hot dogs and five fresh salads, has grown to five locations in seven states with 10 in development on the East Coast.



California Tortilla saw a third straight year of positive comp store-sales growth in 2012, and it also revamped the brand with a new look. Its goal, however, is to always engage customers while maintaining its witty personality, said Stacey Kane, the chain's director of marketing. For example, the brand's customers successfully predicted the presidential election with its Presidential Bowl Poll. Romney's Mexican Mitt-Loaf Bowl lost to Obama's Chicken Teriyaki Luau Bowl. Election Day 2012 was the chain's highest-traffic day in its almost 20-year history. Guests can expect more cuttingedge menu and promotional initiatives plus a 20 percent growth in the number of units in 2013, Kane said.

Elevation Burger

Its commitment to organic, grass-fed and

free-range burgers has helped the 33-

unit burger joint break into our Top 25.

Its sustainability commitment motivated it

recently to join the Organic Trade Associa-

tion, a business association for the organ-

ic industry whose members serve certified

organic products.

Dubai. Although there is only one location, it's inside Latifa Tower, a 56-story office building topped by a lighted 18-by-14 Elevation sign. Locals already are calling it the "Elevation Burger Tower," which is better than any marketing tactic the chain could have launched.

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25 Cowboy Chicken

Rounding out our Top 25 is Cowboy Chicken, the Dallas-based, rotisserie chicken concept, headed by CEO Sean Kennedy. For more than 30 years, these "down home Cowboys" have been cooking all-natural chicken over a wood-burning fire, but the chain has done most of its growing in the past couple years. It's up to eight locations with plans to open at least two more by the end of the year. It was Forbes' No. 1 pick on its 2012 list of "Hot Restaurant Chain To Buy Into Now."



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26 Noodles and Co.

With more than 300 units, Noodles and Co. seems to be thriving under CEO Kelly Reddy and EVP of Operations Phil Petrilli, who took on the roles in 2012. The former Chipotle executives shook up everything from the menu to the service model. The chain expanded its beer and wine selection and also upgraded the experience with new glassware and a focus on "wines from around the world and beers from down the street."

The not-quite-full-table service, rolled out last year, is helping to build dinner sales. Initial testing was in Colorado, Maryland, North Carolina and Illinois and will be systemwide by the end of 2013. Under the format, restaurants add hosts to the dining room floor starting around 4:30 p.m. Guests still order at the counter, but the host welcomes diners, delivers food and takes drink and dessert orders at the table.

27 *Five Guys Burgers and Fries*

While many chains are expanding their menus to include everything from shakes to chicken wings, Five Guys is sticking to its roots — burgers, fries and hotdogs. Why fix what's not broken? The chain, which has about 1,100 units, has more than doubled its footprint since 2009, and has grown 792 percent since 2006, according to Technomic. That's a lot of burgers and dogs.



With its modern take on the Vietnamese banh mi sandwich, noodle bowls and sal-



ads, Bun Mee opened in San Francisco in 2011 under the direction of Denise Tran. She moved from Vietnam to New Orleans when she was 2, and she grew up eating both American and Vietnamese cuisine. With this concept, Tran strives to integrate traditional Vietnamese flavors with familiar American fare. For example, she combined her two faves — sloppy Joes and banh mi — to bring her customers The Sloppy, made with red curry ground beef, house garlic aioli, shaved onion, Thai basil and jalapeños.

Since opening, the restaurant has been featured in The San Francisco Chronicle, in The San Francisco Examiner, in 7x7 Magazine and on Thrillist.com.



Many brands help their communities, but few have gone as far as Panera Bread has. The 1,600-plus chain has opened five Panera Cares cafes, where customers pay what they can. The first debuted in 2010, and founder Ron Shaich said in March at the South by Southwest conference that he's gearing up to open more. And although the brand is helping those less fortunate, to say it's still profiting is an understatement. In fact, it recently launched its largest ad campaign in company history — \$70 million to inspire guests to "Live Consciously. Eat Deliciously."

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30 Famous Dave's

With units already open in Minnesota, Chicago and Oregon, Famous Dave's BBQ Shack is quickly making a name for itself in the fast casual market. Backed by casual dining concept Famous Dave's, the shack features most of the products served in the full-service restaurants but in a faster, less expensive and more casual environment.

Famous Dave's, which has nearly 200 restaurants, is looking to use the Shack model to expand the brand throughout markets that already have full-service versions of the restaurant, said Victor Salamone, vice president of franchise operations and development.

"This will allow us to go from having only a few locations to double-digit locations throughout markets," he said.

31 Fatburger

After closing several dozen struggling locations, it seems Fatburger is now enjoying 2013 TOP 100 MOVERS &

fat sales. In 2005, CEO Andrew Wiederhorn and his company, Fog Cutter, went on a mission to turn around the brand, and it seems to be working. The chain, founded in 1947, now has more than 150 units, almost quadruple the number it had in 2003. And it's not only Americans who love their Fatburgers; the chain has locations in Dubai and Asia, too. Fatburger is also getting into the chicken wing business with its 2011 purchase of Buffalo's Cafe, a casual dining restaurant. Coming soon to Santa Monica, Calif.,

32 The Counter

For The Counter, "custom built burgers" is all about innovating, so much so that the chain has launched a new prototype to showcase its burgers in unconventional locations, such as airports and college campuses. The Counter is still growing — it recently signed a deal to open 33 units in the Middle East throughout the next seven years — and co-founders Jeff Weinstein and Craig Albert believe the new design, tagged BUILT, will thrive in smaller settings.

The chain's dedication to the better-burger market and its 2012 sales of \$87 million helped land it on Forbes' 2013 Top 100 list of America's most promising companies. The Counter plans to open up 15 units this year.

33 *Giardino Gourmet Salads*

It's been a wild ride for Oddy and Kenny Lugo, a south Florida-based husband and wife team who traded in their careers as a teacher and firefighter to open what is now an eight-unit salad chain in 2004. Although the Lugos started the concept on their own, others, including Julio Ramirez, former executive vice president of global operations and former president of the Latin America region for Burger King Corporation, are seeing the potential.

"We believe that we can be the premier gourmet salad, wrap and soup concept in other regions as well," said Ramirez, who is not only on the chain's board of directors but also a financial backer. "I invested in this concept because I know it stands out amongst its competitors in this market."

Ramirez's plans for Giardino go beyond serving the chain's wraps, salads and soups to only south Floridians. His goal: Take the entire Southeast.

How Do You Roll?

Brothers Yuen and Peter Yung launched what they call a "Sushi Revolution" in 2008, when they opened their first buildyour-own-roll sushi restaurant. They have since opened 10 more and recently landed a \$1-million deal to grow the concept when they appeared on the reality TV show "Shark Tank." Investor Kevin O'Leary gave them the funds for 20 percent equity in the company.

"We felt that Kevin's offer provided a strategic alliance and that he could help us with growth," Yuen said.

The chain plans to have 20 locations open by the end of year and an additional 25 ready in 2014, with 20 to 25 units opening each year thereafter. Looks like this chain is on a roll!

35 Jake's Wayback Burgers

Double and triple cheeseburgers are so five minutes ago at this burger joint, where guests take on the nine-patty Triple, Triple Burger. The burger, weighing in at nearly 2,000 calories, has brought the 70-unit chain a lot of attention from media, including Yahoo, Perez Hilton, Good Morning America, CBS, Huffington Post and the New York Post.

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Burgers aren't the only offering on the menu, however. The Delaware-based chain, formerly called Jake's Hamburgers, also serves hot dogs, sandwiches and shakes.



36 *I Dream of Falafel*

Picky eaters feel at home at I Dream of Falafel, where they can choose from vegan, gluten-free, low-fat, low-carb and high-protein options. The chain, opened by brothers Imran and Munaf Kasbati and partners Shoib Aziz and Henry Nuguid in 2009 in Chicago's Loop, has grown to four locations and now offers catering, online ordering and delivery.

2013 TOP 100 MOVERS &

37 *Menchie's Frozen Yogurt*

Husband and wife duo Danna and Adam Caldwell opened the doors to their first Menchie's in 2007, outside L.A. Six years and \$26 million later, it's safe to say their success in the fro-yo market isn't melting anytime soon. The couple's first date was in a yogurt shop, which inspired the Caldwells to eventually launch the concept that has since turned into a chain of 230 self-serve frozen yogurt shops. Their success has not only put Menchie's on our radar, but it is also No. 49 on Forbes' 2013 list of America's most promising companies.

38 *Meatheads*

Although Meatheads operates in the fast casual space, CEO Lyn Devorkin prides herself on the fact that from the time customers walk through the door, the atmosphere feels like a comfortable, fullservice restaurant.

"We are a family restaurant," said Devorkin, who helped grow the brand's revenue by 45 percent in 2012.

The 11-unit chain also supports local charities and is active in chambers of commerce and business groups and even incorporates local high school sports scoreboards and design elements into the décor.

"The theory is that if you take care of the community, the community will take care of you," Devorkin said.

The chain, founded in 2007, opened its 11th location in March and should have at least three more this year. Devorkin said she also plans to increase revenue by another 50 percent.



39 *Moe's Southwest Grill*

The 500-plus chain that serves Tex Mex in a fast casual setting is a master of all things marketing and technology. It not only has a quarter of a million Facebook fans and more than 13,000 Twitter followers, Moe's also boasts an online ordering app, a Check-In Club platform that rewards fans for checking in across social platforms and locations, social campaigns for consumer-generated content and digital menu boards.

In fact, it had such success with digital menu boards deployed by Allure Global Solutions in two of its locations that the Digital Signage Expo recognized its efforts with a Silver Award at its 2013 February awards ceremony in Las Vegas.



Dubbed as an interactive pizza experience, Pie Five allows guests to create their own 9-inch pizzas that bake in less than five minutes, thanks to the latest advancements in high-speed baking techniques. The nine-unit chain, owned by casual dining giant Pizza Inn, offers more than 41 pizza elements for guests to choose from when designing pizzas. They give their orders to "Pie-tech" experts, who assemble each pie by hand with guest input throughout the entire creating process.

Plans are under way to launch 20-plus more units within two years.

41 Rubio's

It's no surprise that Rubio's is famous for its fish tacos when you consider that 85 percent of the seafood it serves is certified sustainable. Another way the 196-unit California-based chain stands out is through its retail website, which has experienced steady sales since it launched last year. Its most popular item is the No. 1 Marquee Men's Shirt Design that sells for \$18.99. The site also sells mugs, flip flops, bumper stickers and aprons so fans can declare their love of the brand's fish tacos.

2013 TOPIDO MOVERS & SHRKERS



Meateaters come in all demographics, a fact not lost on Russ Bendel, president and CEO of The Habit, a better-burger concept that not only serves charbroiled red meat burgers, but also specializes in fresh chicken, salads and sushi-grade albacore tuna flown in three times a week. Pair that with the upscale décor of high-grade finishes, hardwood floors, stone and maximum use of natural light, and it's a burger joint where women can feel at home, Bendel said. However, don't count out the men; The Habit also includes more traditional burger options, including the Double Charburger and the BBQ Bacon Charburger.

The strategy of embracing gender-neutral messaging seems to be working well for The Habit, where sales have grown by 40 percent each year throughout the past four years. The 68-unit chain is also expanding in 2013, with plans to open more than 20 locations by the end of the year.

43 Top That! Pizza

Known as one of the first—if not the first —build-your-own pizza chain, Top That! Pizza has grown to 11 units since its 2010 inception by Lori Walderich and her husband, Jeff. The duo has 12 more in the works for this year and opened the first international location last year in Abu Dhabi. Other Middle Eastern countries will also soon be home to Top That! units.

Hey, Americans aren't the only people who want to craft their own pizza for less than eight bucks and have it out of the oven in less than five minutes.



VooDoo BBQ & Grill

True to its New Orleans roots, the first Voo-Doo location opened on Mardi Gras on St. Charles Avenue in the heart of NOLA. That was 11 years ago, and the chain known for its laid-back atmosphere and slow-smoked barbecue, has grown to nearly 60 units. It plans to open five this year and will start developing 38 additional licenses.

45 BUCU Burger Bar & Bakery

Burgers: good. Cupcakes: good. Burgers and cupcakes: genius. BUCU Burger Bar & Bakery opened in 2011 in New Jersey, and although it has just one location, owner Rick Ross plans to open more Jersey units, as well as some in New York and in the Middle East.

The restaurant has two bars, but you won't find booze at either one. Instead, guests belly up to the Burger Bar or the Bakery & Milk Bar. The Burger Bar allows customers to choose all the elements of their burgers from the bun and meat to toppings and sauces, while the Bakery & Milk Bar serves made-from-scratch cupcakes, cookies, frozen yogurt and customizable cookie/ice cream sandwiches.

46 Wow Bao

With the tagline, "Hot Asian Buns," it's no surprise the Chicago-based chain has garnered a lot of attention, scoring a spot on the Top 100 three years in a row. Wow Bao's innovation doesn't stop with clever marketing, nor does it end with its original menu items, such as bao, potstickers and homemade ginger ale.

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Technology also sets this chain apart from its competitors. CEO Geoff Alexander engages customers with free WiFi, text messaging marketing, and online, kiosk and mobile ordering. He also has a strong focus on social media, including Pinterest, Foursquare, Facebook and Twitter, all of which better connect Wow Bao and its customers.

The chain has four locations as well as a food truck that it dispatches throughout Chicago to help deliver its steamed Asian buns to the masses. Fans can follow the truck via Twitter, using #bunsontherun, to find out where the truck will stop and even to request a visit to their neighborhood.







Concepts often land on the Top 100 for being innovative, and Red Mango is no exception. The Dallas-based chain, however, is known just as much for its savvy use of social media as its menu items. Not to knock the fro-yo, because its fans rave about it, but they especially enjoy raving via social media. The brand has more than 750,000 Facebook likes and 80,000 Twitter followers.

Owner Dan Kim opened the first unit in 2007 and has since grown the brand to more than 200, crediting social media for helping facilitate a dialogue between Red Mango and consumers.

Kim, who is known as a social media guru and often shares his success story at industry conferences, said it's important for any brand to be "likeable," because consumers want to spend their money on companies they connect to.

And when 750,000 people like you, that's a lot of connecting over fro-yo.



Although "SanSai" translates into "mountain vegetables," there's more than just fresh greens on the menu at SanSai Japanese Grill. The California-based fast casual concept also has several locations in Missouri and is looking to grow throughout both states. The menu boasts a variety of meats grilled to order, and chefs roll the sushi in front of guests. SanSai also serves salads tossed with made-from-scratch dressings. None of its fare has MSG or other preservatives.

49 Charleys Philly Steaks

With about 500 locations worldwide, Charleys lays claim to being the world's largest Philly steak restaurant franchisor. Known for its hot Philly cheesesteaks, the Columbus, Ohio-based company, founded in 1986, is still growing strong. In fact, the chain ended 2012 with domestic sales surpassing \$227 million, and owner Charley Shin plans to open another 30 to 40 domestic and 15 to 20 international locations by the end of 2013.



Australian-born Pie Face went stateside last year, serving New Yorkers what look

like mini-pot pies. The chain has more than 70 units in Australia and plans to expand its footprint in the U.S.

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What makes this concept different from those serving standard burritos and burgers is that its main cuisine comes in pie form. Aussies purchase mini pies to go in the same fashion as Americans often pick up a slice of pizza. The non-dessert pies known as "savory pies" are similar to a small pot pie with a fluffier crust and come in little cardboard sleeves to allow customers to eat on the run.

Popular flavors include barbecue, tandoori vegetable, chicken mushroom, steak and the Australian favorite, mince beef and tomato. Standard pie lovers have no need to worry, however; the chain also serves a variety of sweet flavors, including cherry, lemon and chocolate.



MENU INNOVATIONS

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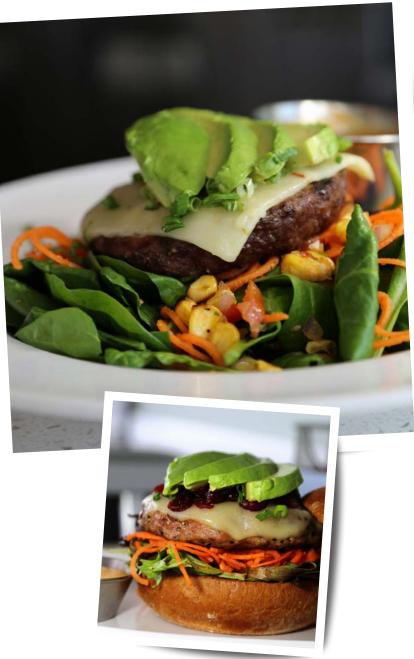


2013 TOP 100 MOVERS &

This year's No. 1 menu innovation is Burger 21's glutenfree menu, and there are at least 21 reasons why it tops the list. (This menu is huge!) A decade ago, gluten-free items were almost impossible to find, and if they were around they lacked in the taste department.

"Considering one in 100 Americans has celiac disease, our guests have requested gluten-free options, so we worked with [Gluten Intolerance Group] to provide a gluten-free menu as a service to our guests," said Shane Schaibly, corporate chef for Front Burner Brands, restaurant management company for Burger 21. "With GIG's help, we developed an easy-to-read gluten-free menu featuring a variety of options for guests affected by gluten intolerance."

Burger 21's gluten-free menu includes seven gluten-free Angus beef burgers served on French Meadow Bakery gluten-free buns, fries and sweet potato fries, fresh salads served without croutons and a variety of hand-dipped shakes and floats. This menu sounds like something people with gluten allergies will find irresistible.



2 McAlister's Tea Bar

McAlister's Deli announced last year that it was updating its store design with several new features; the coolest – we think – is its Tea Bar. McAlister's, famous for its sweet tea, launched the bar to allow guests not only to customize



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their tea but to try new flavors, including Citrus and Mango Green Tea. Guests can further personalize their tea by mixing half sweet tea and half unsweet tea or by adding lemonade. Arnold Palmer, anyone?

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The Tea Bar provides customers with a separate area where McAlister's employees serve the company's signature iced tea to guests, rather than from behind the POS. In addition to extending employee and customer engagement, the Tea Bar provides a fun atmosphere while increasing the speed of service, said Frank Paci, president and CEO of McAlister's Deli. Fans rave about their tea so much that the chain affectionately calls them "tea freaks."

"It's such a big part of our concept that when we unveiled our new prototype last spring, we wanted to elevate our offering by creating the Tea Bar," Paci said. "We think the Tea Bar, as a platform, gives them greater choices and elevates the total tea experience."



Restaurants are finally catching on that diners want healthy, tasty options. Entire concepts, including Veggie Grill and Muscle Maker Grill, are growing rapidly as this trend gains traction, but more mainstream chains are also adding healthy options to their menus.

A recent Hudson Institute study found that restaurants offering more low-calorie menu options experienced higher foot traffic and sales. The study measured the amount of "low-cal" offerings against the restaurants' foot traffic and same-store sales from 2006 to 2011. Restaurants that increased their lower-calorie offerings enjoyed a nearly 11 percent increase in foot traffic and a 5.5 percent rise in samestore sales between 2006 and 2011.



Fast casuals of every type are responding to the customer demand. For example, Cowboy Chicken, a Dallas-based rotisserie chicken brand, recently introduced its new low-cal Corral menu, offering five entrées with less than 500 calories each. Fazoli's recently introduced four new Mini Bakes, all with 400 calories or less this year, and Red Mango launched Skinny Sorbettos. It seems that low-cal menu options are more than just a fleeting trend.

2013 TOPIDO MOVERS & SHRKERS



Fusion offerings

Fusion restaurants are accommodating our varied palates with unique menu items that combine a variety of culinary traditions. Take Taya Indian Kitchen, for example. The Chipotle-style, fast-casual Indian food restaurant opened in San Francisco last year and serves rice bowls, salad bowls and "burroti" (Indian burritos) with options for sauce, protein (chicken, lamb, paneer) and chutney, which comes in mild, medium or hot. If this doesn't reflect a fusion-esque menu, we don't know what does! Consumers can try another example of fusion cooking at another San Francisco eatery, Bun Mee, which is famous for The Sloppy, a hybrid of sloppy Joes combined with Vietnam's banh mi. It's made with red curry ground beef, house garlic aioli, shaved onion, Thai basil and jalapeños.

Miami Subs Grill went a step further and launched an entire Latin Fusion menu that includes "Latin-inspired Miami subs." We can't wait to see what food genres become the next fusion sensation.

Scratch cooking

This year's No. 5 spot is no stranger to the Top 100 — it was our No. 3 on last year's list - so it looks like made-from-scratchcooking is a trend that is about to become mainstream. The myth that it is impossible for any restaurant with more than one location to serve "real food" cooked from scratch is a thing of the past. Fast casual chains are finding great value and profitability in promoting such cooking. While biggie Five Guys promotes its daily use of fresh potatoes for its fries, a smaller chain, Utah-based Costa Vida, has a total of two canned items in all of its kitchens. What 2012 taught us is that eating meals made from fresh, high-quality ingredients is something that consumers want.

5 Use of organics in core menus

The U.S. organic industry grew by 9.5 percent overall in 2011, to reach \$31.5 billion in sales, and there is no doubt that fast casual chains helped to grow it. Californiabased Tender Greens is one restaurant that sees the value in knowing exactly where its food is grown. The majority of its produce is fresh-picked at Scarborough Farms in Oxnard. Even pizza places are embracing the use of organic foods in their core menus. Florida-based Pizza Fusion, for example, boasts a 75 percent organic menu, untainted by artificial additives such as preservatives, growth hormones, pesticides, nitrates and trans fats.

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Greek yogurt

Greek yogurt has emerged as the newest trend in fro-yo. While still a delicious treat, it's also regarded as healthier than traditional yogurt or ice cream because it's made through a straining process that allows more of the whey to drain out, leaving a thicker, smoother yogurt texture.

TCBY, Pinkberry and Yogurtland each recently added Greek options to their menus.

"With Yogurtland's new flavors and new Greek frozen yogurt, you don't have to sacrifice taste to find a healthy snack that supports your New Year's resolutions," said Charlotte Lucich, director of marketing at Yogurtland, which welcomed the year with its first Greek yogurt flavor — raspberry banana.

Even chains known for their outrageously fatty desserts, like Ben & Jerry's, are dipping their spoons into Greek yogurt. The brand's Scoop Shops across the country carry Greek fro-yo flavors, including strawberry shortcake, raspberry fudge chunk, banana peanut butter and blueberry vanilla graham. The addition of these Greek yogurt options allows people to feel like they are indulging without going overboard with a high-calorie dessert. Innovative burgers

Burgers continually top restaurants' sales charts because they are affordable, portable and customizable, which guests love. In fact, the variety of better-burger chains thriving today is proof that customers want innovation. For example, Burger 21 offers 21 burger varieties, including lamb, veal and veggie, while MOOYAH recently introduced its versions of the turkey and veggie burgers. If those aren't innovative enough, Bull City Burger and Brewery brewpub, a fast casual concept based in North Carolina, might do it for the most adventurous eaters. The chain recently celebrated its second annual Exotic Meat Month, serving burgers made with exotic meats, including python, elk, ostrich, beaver and alligator.

Milkshake innovations

Maybe it has to do with how trendy nostalgia is these days, but milkshakes are becoming more popular, and they're not just for kids. From 2011 to 2012, Technomic's analysis of the Top 500 restaurant chains found a 16 percent increase in adult-focused beverages featuring ice cream. And in order to provide a little variety, many brands have rolled out more upscale or unique flavors, including the Salted Caramel shake from Smashburger and Fatburger's Strawberry-Banana shake.

Chains offering booze-spiked ice cream drinks rose by 17 percent, as well. The Counter, for example, offers an Adult Apple Pie Shake, featuring Flor de Cana Rum.

Condiment/salsa innovation

2013 TOP 100 MOVERS &

One way to jazz up any run-of-the-mill meal is with exciting condiments, and 2012 saw plenty of innovations in that department. For example, Pancheros Mexican Grill debuted two new condiments in late 2012, a cilantro-lime vinaigrette and a salsa verde that can top both salads and burritos.

Flavor innovation presents a solid competitive advantage for both operators and manufacturers, especially when it comes to dips, sauces, condiments and marinades, said Darren Tristano, EVP of Technomic. "The punch of heat and spice, and the balance of creaminess or sweetness, underscores the uniqueness in the preparation. An unusual flavor profile could be one that drives repeat visits by consumers," he said.

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PEOPLE

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CEO, Firehouse Subs

Topping our list this year is Firehouse Subs CEO Don Fox, who has been throwing gasoline on the chain's fiery growth since he took over in 2003. With locations across the nation and in Puerto Rico, the 600-plus unit chain shows no signs of stamping out growth. In fact, Fox plans to open locations in Mexico by the end of the year and hopes to be in Canada by 2014. His ultimate goal is to reach 2,000 units worldwide by 2020.

2013 TOP 100 MOVERS &

That's pretty impressive, but it's not the only reason Fox has taken our top honor this year: Not only is he guiding his own chain to grow and succeed, but he is also doing so for the fast casual industry overall. As a speaker and panelist at conferences all over the nation, Fox often shares his go-to strategies and success stories and isn't afraid to talk about failures to teach others how to grow their brands — even when

competitors are in the audience.

"The desire to share my experience and insight is driven by a firm belief that if our industry performs better as a whole, people are likely to dine out more often," Fox said. "The success and growth of Firehouse Subs does not have to be dependent on another restaurant operator's loss."

Fox's leadership commitments don't stop there; he also serves on most of the industry's top organizations, including the National Restaurant Association, MUFSO, Fast Casual Executive Summit Advisory council, the Restaurant Leadership Council and the Fast Casual Advisory Council. "The industry has also been incredibly good to me for 38 years," Fox said. "The longer I am in the business, the more I am compelled to pay it forward. When it is all said and done, I hope that my contribution has helped make the industry just a little bit better, and will have inspired the leaders of tomorrow to take it even further."

But don't think this Fox is only about work. He's also passionate about traveling to baseball games with his family, playing the trumpet and studying history. He wrote the book "Patton's Vanguard," about the United States Army Fourth Armored Division.



2013 TOPIDO MOVERS & SHRKERS



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• **Carl Howard** • CEO, Fazoli's

When Carl Howard took over as CEO of Fazoli's in 2008, he knew he had a lot of work to do to pull the struggling brand out of its downward spiral. Although Howard was the driving force behind the chain's new menu and rebranding

efforts, he credits his customers for demanding the changes in the first place.

"Through in-depth consumer analysis, it was our current guests who were clearly telling us that they wanted a better food experience, and the lapsed users were migrating away from the brand to other concepts that were providing a better food, service and environment option," Howard said. "So the guest clearly gave us the license to elevate the experience."

Upgrading everything from the food and design to the service style was expensive, but Howard knew the key to making it work was balancing the price points to pay for the improvements without alienating the consumer who used the brand for value.

"Having a great leadership team was key in our brand repositioning," he said. "The team assisted me in engineering the brand and finding model improvements that allowed us to absorb most of the cost for the experience upgrades. The improved brand allowed us to attract a new consumer base without losing our core consumer, and sales took off."

That strategy seems to be paying off; in 2012, Fazoli's hit \$226 million, a 5.1 percent year-over-year increase, and both company and franchise restaurants posted 28 consecutive months of samestore sales growth (through November 2012). That's the longest sustained year-over-year sales gain in the company's 24-year history. The brand, which operates 216 units in 26 states, has been "sales positive" in 30 of the last 31 months and through eight consecutive quarters, Howard said.

"We see another sales breakout coming in the back half of the year, and we should see the brand really take off again," Howard said.



This Canadian entrepreneur launched MonkeyMedia Software 16 years ago to help restaurant operators grow sales and increase profits by becoming experts in catering. The company has helped Dardick build his reputation as a catering guru. He's become not only a respected blogger and conference speaker on the topic, but he's also written a book on it, "Get Catering and Grow Sales! A Strategic Perspective for the Multi-Unit Restaurant Executive," which was published in 2011.



Dardick's latest project is a documentary film. Back to Basics, due in 2014, examines the future of the U.S. restaurant industry in a global economy and includes interviews with a variety of restaurant CEOs and industry leaders.

2013 TOPIDO MOVERS & SHRKERS



Jim Vinz Co-CEO, Le Duff America

During Jim Vinz's 15-year tenure at The Corner Bakery, where he served as COO and then CEO, he helped expand the brand from a four-store startup in Chicago to a nationwide brand of more than 140 company and franchise locations.

After enjoying such success, it makes sense that Vinz would be ready for a new challenge. Last year he became co-CEO at Le Duff America, where he has been instrumental in the growth of three of the firm's fast casual concepts: Bruegger's Bagels, La Madeleine and Brioche Dorée are thriving and have opened several new locations and rolled out new designs in the past year.

Deeply committed to ending childhood hunger, Vinz has also served on the advisory board for Share Our Strength's Dine Out for No Kid Hungry since 2008 and was chairman from 2011 - 2012.

Bryan Lockwood CEO, Tavistock Restaurants

Running one restaurant brand is stressful, but imagine being in charge of 15. Bryan Lockwood doesn't have to use his imagination. As president of Tavistock, he oversees a portfolio of 15 restaurant concepts, which includes 125 restaurant units, more than 60 of which belong to Freebirds World Burrito. Since buying the fast casual concept in 2007, Lockwood has spearheaded initiatives to help grow the chain, quadrupling the number of open units since 2010. It now has more than 60 open, and Lockwood is predicting another year of doubledigit percentile growth by the end of 2013. That success may have something to do with Lockwood's commitment to his employees.

"My leadership philosophy has always been 'bubble up' vs. 'top down,'" he said. "I see my role as CEO as an inverted pyramid with me at the bottom, and the people who manage the day-to-day nearer the top."

Lockwood understands that being on the front lines isn't for everyone and is dedicated to finding the best employees for the job.





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Steve Ells Founder, Chipotle

There is more to Chipotle founder Steve Ells than just burritos and bowls. He's a classically trained chef, who is viewed throughout the fast casual industry as a true visionary. He's helped grow the chain to nearly 1,500 U.S. locations, all while the menu has stayed relatively simple and consistent. Why mess with a good thing?

His original vision was to provide a place where customers could eat a delicious meal, with fresh ingredients at an affordable price. Ells has changed the way people view fast food, and has done so while maintaining a true commitment to using fresh ingredients. And he's not done. His new mission is providing food with integrity to ensure he and his employees run their business in a way that doesn't exploit animals, people or the environment. Ells isn't your typical CEO. The "green" he is most concerned about is the environment — and maybe the guac.

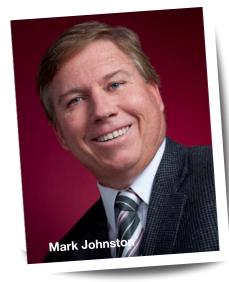
2013 TOP 100 MOVERS & SHRKERS

7 Mark Johnston CEO, Burger 21

Mark Johnston has had a busy year. The chief concept officer of Front Burner Brands, the management company behind The Melting Pot, Burger 21 and GrillSmith, has specifically been focusing on the growth and expansion of Burger 21.

In fact, the chain recently announced the signing of two new franchise deals in Albany, N.Y., and Sarasota, Fla., increasing the brand's footprint to cover seven states.

Johnston, who has spent more than 30 years in the industry, got his start in 1976 as a server at The Melting Pot. A few years later, he and his brother Mike opened their own location in Tallahassee, and by 1985, they owned the brand. Seeing the potential profit in the fast-casual market in 2010, Johnston launched Burger 21 with his wife, Arlene, Mike and their other brother, Bob. With five locations and 12 more in development, Johnston is proof that working your way up from server to exec is possible.





Phil Petrilli EVP of Operations, Noodles & Company

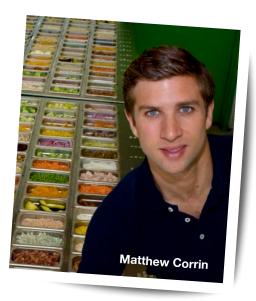
Phil Petrilli is no stranger to the fast casual concept. After spending 13 years helping grow Chipotle Mexican Grill, Petrilli accepted the job of EVP of operations at Noodles & Company in May 2012. Petrilli is bringing the same commitment to noodles that he had for burritos and bowls. The chain has more than 300 restaurants and is still growing, concentrating on company-owned stores. By opening and running company-run stores as opposed to franchises, Petrilli expects the chain to become one of the fastest-growing concepts in the restaurant industry.

Matthew Corrin CEO, Freshii

Just when you thought Freshii's 30-something founder Matthew Corrin couldn't get any cooler, he goes undercover. Corrin recently appeared on an episode of "Undercover Boss Canada," where he donned a fat suit and posed as a new employee. He learned not only about workers' commitments to the brand, but also a few things to help streamline operations. Corrin, however, knows a thing or two about operations. In the seven years since he opened the first Freshii in Canada, he's grown the brand into a successful international franchise, leading what he calls the "healthcasual industry."

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With his environmentally sustainable approach, Corrin has skyrocketed his concept into more than 100 locations and continues to reach current and new customers through social media. Customers can even build virtual meals and track all nutritional information online.





We can officially rule out "beginner's luck" when it comes to Greg Dollarhyde and his success in the restaurant industry. This fast casual guru has not only grown the California-based Veggie Grill to 17 units since he took over in 2011, but he's also credited with helping expand Zoës Kitchen, a Mediterranean concept that now has more than 80 units, where he was former CEO and still serves as executive chairman.



Also in his portfolio is Dollarhyde Enterprise Group, which provides operational, financial and strategic counsel to new restaurant owners or those seeking help to rebrand.



Randy Gier and Laurie Curtis Co-founders, Cedars Woodfire Grill

"Eat Well, Live Well, Feel Good" — that's the slogan of Texas-based Cedars Woodfire Grill. Since opening in Plano in January 2011, it has expanded into a second location in Frisco, with a third getting ready to open in Dallas. Gier, who is also the CEO of Pizza Inn and Pie Five, and Curtis have



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combined their 45 years of restaurant experience to fill a need that the fast casual industry is just starting to realize exists: budget-friendly food that is fresh, healthy, and caters to the whole family.

With a marathon runner and a mom at the helm, a menu designed with the help of a master chef — including kids' menu options chosen by actual kids — and close community ties with youth sports teams among its many advantages, Cedars is poised to deliver truly healthy family-oriented food to an ever-widening consumer base.



Frank Paci CEO, McAlister's Deli

Prior to Paci's appointment as CEO in 2010, McAlister's Deli was primarily known as a place to grab a quick sandwich. Since then, however, Paci has dramatically shifted the image with a more varied menu. Everything is made-to-order, including the loaded baked potatoes. As is only right for a chain with southern roots (the first location opened in Oxford, Miss.), employees brew the sweet tea on-site in several fresh batches throughout the day. The focus also is on customer service. Paci's goal is to provide an environment in which diners can either grab a quick bite and run or have a leisurely meal with friends without feeling rushed. He also has a strong commitment to expansion; he opened 12 new locations in 2012 and has 20 on the 2013 agenda. Paci attributes his success to a commitment to work closely with his franchisees.

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B Rod Silva Founder, Muscle Maker Grill

While many fast casual concepts are just now moving toward healthier options, Rod Silva, CEO of Muscle Maker Grill, was one of the first to launch a restaurant aimed specifically at the health-conscious eater. His motto is "Great food with your health in mind," and the menu is engineered to provide meals with the optimum balance of nutrients to keep diners feeling full and satisfied, without using fillers like fats and empty carbs. Thanks to Silva's passion for physical fitness, his customers have meal options for practically any type of lifestyle, whether they're professional athletes or casual consumers just looking to eat a little better



2013 TOPIDO MOVERS & SHRKERS



Russ Bendel CEO, The Habit Burger Grill

The Habit Burger Grill has been open since 1969, but it didn't hit its growth spurt until 2007, when Russ Bendel came aboard. Bendel, who once served as president of The Cheesecake Factory and CEO of Mimi's Café, has taken the chain from 21 to 66 units, and sales have increased by 845 percent since he took charge. Growing the brand isn't his only goal, however; he's also passionate about sustainability.

"We know we are a burger joint, but it's important that we do our part," Bendel said, about the company's rain chain that catches rain water from the roof that's used for landscaping. The chain also uses a waterless urinal that saves 40,000 gallons of water a year, and it is evaluating solar panels in some units.

15 *Betsy Craig* CEO, MenuTrinfo

For kids, food allergies can mean feeling left out when dining out; for parents, it means constant stress about their child's health, and for restaurants, it means an entire pop-



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ulation of eaters that they can't feed. Colorado resident Betsy Craig aims to change all that.









Her company, MenuTrinfo, takes a twopronged approach to food safety. The first is to take the guesswork out of food safety by using her proprietary software that allows chefs and restaurant owners to use a reverse ingredient lookup to obtain full and accurate nutritional information, which results in creating healthier menu items. The service includes allergen tagging for all the recipes on their menus. The second half of Craig's initiative is AllerTrain, a kitchen and front-of-house stafftraining program in food safety, recognized by the American Culinary Federation and the Acadmemy of Nutrition and Dietetics.

16 *Carlos Guerra* CEO, Giraffas

With more than 400 locations open, Giraffas is the third-largest fast casual concept in its home country of Brazil, despite direct competition from U.S.-based brands such as burger giant McDonald's. Still, homefield success doesn't necessarily mean a smash hit abroad, so when Carlos Guerra decided last year to expand to the U.S., he played it smart. The city of Miami is a popular destination for Brazilians on vacation, and with that established customer base it made sense to test the first U.S. location there. Not even two years later, Giraffas has expanded to five Miami locations, proving that Americans are welcoming the same high-quality Brazilian foods made popular by upscale steakhouses in a fast casual setting. Guerra plans to open at least 12 more American units by the end of 2013.

2013 TOP OD MOVERS &

Kevin Miles President and CEO, Zoës Kitchen

Founded in 1995, Zoës Kitchen started out as a way for founder Zoe Cassimus to share with the world her southern-influenced Mediterranean cuisine. Her original





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Zoës chicken salad recipe is still one of its best-selling menu items, but since taking over as COO in 2009 and then as CEO two years later, Kevin Miles has expanded the menu to appeal to a wider customer base, such as those looking for low-carb or gluten-free options. He's also focused on the concept's carryout service, which provides meals for four that can be ordered ahead for a quick, healthy family dinner, as well as fresh-made side items sold by the pint. With 20-25 locations expected to open in 2013, Miles is looking to bring Zoës fresh, family-oriented fare to the next level.



Since changing ownership in 2003, California Tortilla has expanded from two Maryland locations to more than 40 spread across the Mid-Atlantic and into the Northeast. During that growth, Kane has worked hard to keep the brand's quirky,

2013 DP DD MOVERS & SHRKERS



offbeat personality. By using social media and the chain's e-newsletter, Taco Talk, Kane maintains it well. She launches funny contests and innovative marketing ploys to keep customers guessing; she even launched one campaign around her own birthday. By embracing the power of new media, Kane has helped California Tortilla reach thousands of customers while keeping advertising costs relatively low.



Maria Pourteymour Co-founder and Chief Cuisine Officer, Luna Grill

With two-earner couples becoming more and more common, people are looking for affordable dining options that are still healthy. Maria Pourteymour and her husband, Sean, opened Luna in 2004, after Maria became concerned that her kids didn't have healthy choices at most restaurants. Maria, who oversees every menu addition, wants customers to allow her to "replace their kitchens" by offering food choices that they'd make if cooking their own meals. All of the restaurant's proteins are hormone- and antibiotic-free, and they use no trans fats. The Pourteymours are so confident in their ingredients that their list of delivery providers is available for customers to see on their website. Pourteymour hopes that when other fast casual concepts see Luna Grill achieving success while holding to such high standards, they will be inspired to do the same.

Alon Mor Founder, president, and CEO, Garbanzo Mediterranean Grill

A native of the Mediterranean, Alon Mor has made it his personal mission to bring fresh, authentic Mediterranean flavors to U.S. customers. By allowing customers to build their own entrees and providing calorie information for specific ingredients rather than whole dishes, Garbanzo gives diners control over what goes into their food. With everything scratch-made, including the pitas baked on site throughout the day, Garbanzo is bringing a fresh take to fast-casual Mediterranean. Although Mor, who founded Garbanzo with Panera Bread founder Ken Rosenthal in 2007, is passionate about his business and the fast casual industry, he is also just as passionate about his family. He has a wife and three daughters and loves spending time with them in his at-home kitchen.

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Social media: marketing and analytics

It shouldn't come as a shock that the use of social media to gain customer feedback tops our list. This clever use of social media is exploding within the foodservice industry. Restaurant execs have learned that sites like Facebook can analyze customer behavior to help improve operations and service. The instant feedback is giving restaurant owners a very accurate look at how customers perceive their products and services. Venuelabs and newBrandAnalytics are just two of the social media tools that fast casual restaurants are using to reach and analyze their customer base. Venuelabs taps into social media to track what customers are saying about brands, and similarly, newBrandAnalytics analyzes social media feedback and translates it into operational insights.

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Digital menu boards



Digital menu boards give restaurants a modern, trendy way to communicate prices and promotions as opposed to outdated static boards. This technology not only allows restaurateurs to incorporate video into their menu displays and update menus for last-minute product and price changes, but also gives them the ability to remotely update menu boards from anywhere in the world. They're more visually appealing, and they can help restaurant owners cut out printing and shipping. When a new product hits the menu, instead of ordering new signage, removing the old and replacing with the new, staff members can simply make the change with a push of a button.

The FreshBerry Frozen Yogurt Café and The Cereal Bowl are two of many fast casual chains finding success by incorporating digital menu boards. While listing menu items and their prices is the primary function of the boards, another great feature is the ability to list nutritional information by each product.

No one likes waiting in line, and self-order kiosks, iPads and mobile apps give consumers the opportunity to skip traditional face-to-face transactions to speed up the process.

Self-ordering

Boar's Head deli has incorporated self-ordering kiosks in its new locations, and about 60 percent to 70 percent of customers are using them. The result is higher ticket averages for Boar's and better customer service for customers. To ensure customers still see a friendly face, however, Boar's Head still has customers pay at the cash register, but ordering is much faster.

The use of iPads and mobile apps takes self-ordering one step further. Restaurant chains, including Blazing Onion, are now placing iPads at each table in their restaurants to allow customers to order drinks, food and dessert when they are ready for each. A variety of chains also have mobile apps that allow customers to order before arriving to pick up their food. This cool innovation puts the customers in charge of the timing for each phase of their meal. 2013 DP 100 MOVERS &

L Mobile payments

Leading journalists and analysts say the time to think about mobile payments is now. Mobile Payments Today, a news site for the industry, said 2013 will be yet another big year for solutions among small and medium businesses. Research from Juniper predicts the value of mobile payment transactions will reach \$1.3 trillion per year by 2017. The fast casual segment will make up its fair share of the volume.

Companies such as eThor, Square, Isis and LevelUp are paving the way for owners to incorporate mobile payments into their restaurants. Starbucks has seen great success with its branded-mobile payment option, while LevelUp has helped more than 3,000 businesses, including Sweetgreen and Organic Avenue, launch branded apps. These chains are just a few that see mobile payment as a cutting-edge convenience for customers. Another chain touting mobile payments is Jamba Juice in Emeryville, Calif. It's testing Isis virtual wallet in several of its units, so it will be interesting to see which mobile payment format gains the most traction in the restaurant industry.

🕤 Mobile apps

Mobile apps are not just for huge franchises anymore. Whether at a multi-million-dollar business or a mom-and-pop restaurant with a handful of employees, mobile app usage is on the rise among consumers. A recent study by the Pew Internet & American Life Project determined that 46 percent of Americans use smartphones and that there will be nearly 1.7 billion mobile Web users around the world by 2013. You don't have to be a statistician to see the importance of having a mobile presence! Biggies such as Chipotle and Panera Bread, of

interesting example, Appsbar offers free platforms for restaurants to create their own apps.
industry.
Mobile loyalty programs Paper punch cards coupons are so yes-

reaper punch cards coupons are so yesterday! To entice customers into their restaurants, business owners are now using mobile loyalty programs, such as Punchh, a social media platform that engages customers and tracks exactly who is dining with you and when.

course, have impressive mobile apps, but

there's help out there for smaller compa-

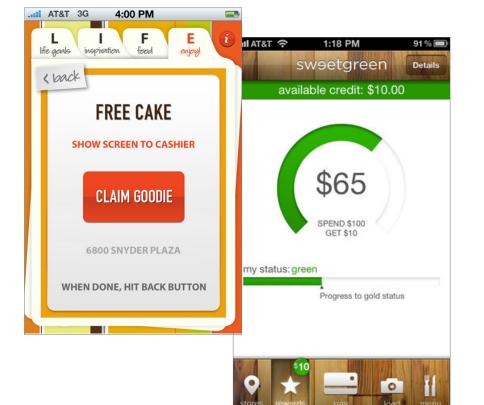
nies looking to build an app cheaply. For

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These programs are win-win: customers love them because they're convenient. The worry of having to keep track of one more piece of paper disappears. Business owners love them because they can target their marketing to relevant customers and reach out with personal touches. Who wouldn't like a text on their birthday, offering a discount at one of your favorite restaurants? California-based Baja Fresh Mexican Grill, for example, uses Punchh to give customers \$6 off after their fifth visit. Paperless loyalty programs allow restaurant operators to connect with customers in real time and increase loyalty using rewards, all while being earth-friendly.

ChowNow

With the smartphone revolution in full effect, ChowNow has seized the opportunity to provide restaurants, and their sometimes impatient customers, a mobile and Facebook online ordering system. In just a few steps, customers can order and pay for food and receive email confirmation when



the order is ready. The innovative app launched in March 2012, and in January of 2013, already had thousands of restaurants using it in 43 states, and tens of thousands of customers participating daily. Perhaps the most intriguing feature is that Facebook users can order right from their accounts. That's 800 million-plus people who could send an online order daily.

🔒 MenuTrinfo

It's no surprise MenuTrinfo made it on our Top 100 for the second year in a row. For those restaurant owners looking for a way to provide detailed nutritional analysis to customers, MenuTrinfo could be the answer. This full-service nutrition solution provides reverse ingredient lookup and allergen tagging for every recipe on your menu. Through the use of its proprietary software, MenuTrinfo can complete nutrition reports and provide suggestions to make menus more nutritious. And its innovation doesn't stop there; the company will also help restaurants market their new health-conscious



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menu to health-conscious eaters. Whether your motivation is to bring in those healthy eaters or to provide a transparent look at your menu for people with food allergies, MenuTrinfo can help. Fast casual restaurants such as I Dream of Falafel and Sweetgreen are using the technology to reach diners with specific dietary needs.

9 TurboChef 2020 ventless oven

TurboChef Technologies' High h Conveyor 2020 oven allows restaurants to deliver delicious, warm, made-to-order meals in less than 5 minutes. Restaurants like Pie Five and Quiznos are using these ovens to give customers exactly what they want and in the timeframe they demand. In many



cases, these ovens can have your pizza cooked before you have even paid for it. The HhC 2020 is capable of cooking 60 12-inch pizzas in one hour. Compact versions of the TurboChef ovens are found at restaurants including Sushi-Yo and Chicago Rock Cafe'. These ovens can do more than pizza and sandwiches: If wings are in order, it can cook eight frozen wings in five minutes.

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Coca-Cola Freestyle

The Coca-Cola Freestyle machine has become more than a futuristic-looking soda machine since its launch in 2004. It has become the ultimate method of self-expression for this generation of Millennials who want everything customized specifically for them. Whether you are a run-of-the-mill Coke drinker, or a fan of raspberry-vanillacherry Coke Zero, this machine can create it. Offering more than 100 flavors, the Jetson-esque machine creates endless possibilities for soda drinkers. The Freestyle PurePour system uses concentrated 46-ounce cartridges to mix drinks, all coming from one spout. Noodles & Company, Qdoba, Five Guys and Wingstop are just a few fast casuals using the Freestyle.

Taking its techy innovation a step further, Coca-Cola recently launched its Coca-Cola Freestyle app for Android and iPhone that includes a memory game and a Freestyle locator.

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Catering

The demand for quick, simple food options for meetings and parties continues to grow, and fast casuals are reaping the benefits from delivering high-quality catering options at affordable prices. In fact, fast casual chains are predicted to outperform all others in the catering market in 2013, with a projected 12 percent growth. Today, restaurants are now earning four times the revenue of retailers for catering occasions — \$19.3 billion versus \$4.0 billion.

Fast casual chain Capriotti's is one business seeing huge growth in this area. Last year, about 5 percent of its business came from catering, a number that's expected to double this year. Other chains, including Firehouse Subs, McAlister's Deli and Boston Market, also have increased catering options and expect to have bigger numbers this year than ever.



Many restaurants are finding success by opening units outside the United States. Today, the Middle East has become a hotspot for American fast casual chains. Top That! Pizza already has a unit open in the Middle East, and plans to open 20 locations throughout the Gulf countries. Smashburger, Freshii, FreshBerry and Buffalo Wild Wings are just a few of the fast casuals that have planted flags in the Middle East over the past year.

Other chains, including Johnny Rockets, also are taking a stab at international launches by opening in airports. The brand launched two new restaurants in New Mariscal International Airport in Ecuador and is looking to expand in South America, Brazil, Colombia and Peru.



Brands need to pay attention to the two facets of mobile marketing: the inbound component and the outbound component.

Inbound, the first need is to deploy a mobile-optimized website. While many news and information sites function well enough when the desktop version is opened on a tablet or smartphone, visitors to a restaurant's URL usually are task-oriented. They want to see any special offers, to get phone numbers or directions, or even to preview nutritional information as part of deciding where to eat. Anything that impedes that quest—such as giant photos or long load-time animations—can quickly send their fingers tapping to another brand. Outbound, the mobile interaction usually ties into location-based marketing and the desire to grab the customer's attention when he is in the neighborhood. The archetype of this marketing strategy is seen when the would-be customer drives somewhere in the vicinity of your brand and software sends a text message with an offer for a burrito at a discount. The strategy is immediate and works well in a world where paper coupons are no longer cut it.

Mobile also comes into play during the decision-making process when customers search online reviews. Brands can get help competing in this arena from companies such as Rewards Network, which tracks online and mobile reviews to help its restaurants better market to customers via phone, email and social media. 2013 TOP 100 MOVERS &

L Customization

People want what they want, when they want it. The fact is neither new nor lost on successful restaurant chains. Whether it's the ability for customers to make menu choices - fries or apples - or technology-related options - paying at the counter or via phone - customizing the quest experience is more significant than ever. The Coca-Cola Freestyle machine, for example, gives people more than 100 soda flavor combinations. Smaller restaurants, such as Mucho Burrito Fresh Mexican Grill, are learning from the Chipotles of the world that customers want to build their own meals, whether that's a pizza or a burrito. Customization doesn't stop when it comes to food, however. Rockbot, backed by Google, gets rid of annoying background music at restaurants and replaces it with a personalized music experience via a mobile app, and customers dining at Washington-based Blazing Onion can place their orders via employee, kiosk or iPad. The choice is theirs!

5 Corporate consciousness

Customers love the warm, fuzzy feeling they get when giving their business to companies that help their communities, which is why companies who care made No. 5 on our list.

"Corporate consciousness is the growing belief you can do good and make money at the same time," said Denise Lee Yohn, strategy consultant and president of Denise Lee Yohn Inc. Many fast casual chains are doing just that. Panda Express, for example, raised more than \$813,000 last year at its 14th Annual Panda Cares Charity Golf Invitational. Also last year, to celebrate the opening of a new location, The Habit Burger Grill hosted preopening events and donated 100 percent of its profits to the MDA, Contra Costa food bank and the Humane Society. Wildflower Bread Company, based in California, donates its daily leftovers to help feed the hungry. And don't forget Panera Bread, which has gained a lot of notoriety for opening Panera Cares cafes, where guests order food and simply pay what they can afford.

Although helping the community is obviously the right thing to do, said Lyn Devorkin, CEO of Meatheads, it's also good for business.

"If you take care of the community, they'll take care of you," she said.





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Sustainability/Recycling Starbucks reusable cups

Sustainability is all about companies treating the environment with respect. Consumers not only are becoming more aware of this idea, but also are choosing to give their business to companies who show concern. Sustainability has economic, environmental and social implications, and companies that find a way to market their attempt to give something back are seeing rewards at the cash registers. One easy way companies are doing this, is by recycling. Last year, one Panera Bread location in San Francisco created a recycling program that diverted 75 percent of its waste from California landfills. Similarly, Starbucks debuted a reusable cup in 2012. It looks just like its popular paper cups and costs \$1. Customers who bring back the cups get discounts on their drinks, which is a win for the customer receiving the discount, but also for Starbucks, which attracts a repeat customer.



Alcohol on the menu

Although a few fast casual chains, such as Shake Shack and Chipotle, have offered alcohol since Day 1, most are just now starting to come around. It may seem like an easy way to pad the bottom line, but according to Technomic, fast casual chains average only about 2 to 4 percent of total sales from beverage alcohol. What they are noticing, however, is that serving booze is a way to differentiate themselves from QSR competitors and to compete with casual dining restaurants.

Big-name brands, including Freebirds, Smashburger and Noodles and Co., each increased their craft beer offerings in 2012, while smaller chains such as The Counter started offering more innovative beverages, including spiked milkshakes. Even Chipotle is adding to its liquor lineup, with most of its units now serving margaritas. The pizza as a fast casual trend has also lent itself to an increase in healthier components, including whole wheat crusts, organic toppings and gluten-free varieties.

"This will be very strong, especially at lunchtime." Because customers are wanting better pizzas, as a whole they are willing to spend a little more," Tristano said.

9 *Rise of the salad concepts*

Remember when salads were simply a way to start a meal? Yeah, we didn't either. Concepts built around salads are growing like weeds. From The Big Salad, which advertises more than 17 million ways to create a salad, and Tossed, the first salad concept to hit the Big Apple, to Sweetgreen, Saladworks and Chop't, salad chains are giving customers looking for healthy options a variety of ingredients to upgrade a once

healthy side item into a meal.

Adding fruits, grilled veggies, cheese, spicy nuts, pureed purple onions and potatoes are just a few ways chefs are livening up the greens.

Snacking

One aspect of eating that has changed over the past few years is the amount of people snacking. A recent Technomic study found that 48 percent of respondents said they snack at least twice a day, compared to only 25 percent in 2010. Fast casuals are catching onto this trend and are offering smaller-portioned and portable menu items to fit the snack craze. Another way restaurants are helping customers get their snack on is by staying open longer to cater to the younger, late-night crowd.

Pizza as a fast casual concept

Pizza is quickly becoming the new darling of the fast casual industry, but it will take a little bit of time to see which concept—Top That!, Uncle Maddio's, Fresh Bros, Mod, Pie Five, Blaze, etc.—will reign supreme. What most of the concepts have in common is their assembly-line style of allowing guests to create their very own mini pizzas.

"These pizzas are made in three minutes and they're made to order, and this is really an area pizza hasn't seen before, but it's what consumers want," said Technomic's Darren Tristano.



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