Fifth Annual

FastCasual.com

TOP 100

2009 MOVERS & SHAKERS

The Fifth Act of Fast Casual

Paul Barron, publisher

Over the past 15 years since I coined the term "fast casual," I have seen the segment of restaurant it describes go from virtually nonexistent to become the fastest growing in the restaurant industry. So many concepts based on creativity, passion and innovation have sprung forth in that time that, in essence, their collective emergence heralds the era of Restaurant 2.0. I credit the spread of fast casual concepts across the nation for that reinvention of creativity.

In 2009, I visited my 610th fast casual concept. It was called The Cheese Course, in Weston, Fla. At the same time, recalling the variety of brands I had experienced, I began to question my term. What, really, was fast casual? Were the restaurants I was experiencing worthy of being called fast casual, whatever it was?

In its early years, even I mistook the segment's pioneers as just new expressions of the quick-service model, believing further that consumers would never really "get it" when it came to the differences between the latest representatives and the more traditional ones. But when, in the 1990s, the segment congealed and consumers not only recognized but embraced the differences, I came to my senses and began to respond in four critical acts.

First, I sought a corporate home for FastCasual.com, the Web site I had developed to begin covering the segment, and I found a good one in NetWorld Alliance. Second, my partners and I produced a new industry event, the Fast Casual Executive Summit. Third, we published the Fast Casual Top 100 and the Fast Casual Annual Benchmark Study. Fourth, we built the Fast Casual Alliance, an industry group that could impact policy and influence the national restaurant scene.

This year, for the first time, the segment is included in the National Restaurant Association's Annual Forecast Report. More than 650 concepts in the United States call themselves fast casual. The global aspect of fast casual is emerging and invading multiple continents. Most consumers really do understand the value proposition that fast casual brings to eating out. And most of all, fast casual has built its own identity in an industry with more than 13 million people employed and more than $580 billion in sales.

No wonder, then, so many operators want to launch fast casual concepts, or to identify their current ones as fast casual. But it takes more than merely adopting the label to fulfill the promise of quality and atmosphere increasingly inherent in it. We now have concepts that falsely believe they have crossed the bridge to fast casual, and some that just believe they have been delivered to the Promised Land just because they say so. As a result, the integrity of the segment is threatened.

These realizations have led us to a fifth act in the evolution of fast casual, which is to refine the application of the term itself. First, the definition. A fast casual concept is one that creates a unique value and quality experience, with gourmet-level food or drink, that delivers an interior that wows the guest, all at a price that is driven by value. Second, the culling of concepts that meet the definition. You will see the results in this edition of the Top 100, where many concepts that might have made the list last year were deemed outright ineligible after the application of the standard, or that were close enough to be called wannabes.

We have a major responsibility not only to the operators who have sweated the details to create a fast casual concept, but also to the customers who have come to associate the term with a high-level, very specific type of dining experience. Please, then, understand our new focus, and contact me anytime with objection or reasonable argument about why a concept should be — or, for that matter, should not be — considered fast casual. I would welcome the dialogue.

Dine tastefully,

Paul Barron
Publisher
Twitter.com/paulbarron

74. CPK ASAP
Los Angeles / No. of units: 9

A smaller version of California Pizza Kitchen, the company's ASAP locations are more for the dash-and-dine consumer still looking for a quality meal. New menu items for ASAP locations include Moroccan Chicken Salad, Tuscan White Bean Minestrone and the Cranberry Walnut Chicken Salad Sandwich. In 2009, a franchisee also opened the company's first fast casual restaurant on the college campus of Hofstra University.

75. EVOS
Tampa, Fla. / No. of units: 7

EVOS solidified its reputation as one of the country's most environmentally conscious franchises when Greenopia recognized it for its efforts to be as "green" as possible and to keep its environmental impacts to a minimum. Greenopia is a directory to help guide consumers looking to make environmentally and socially conscious purchases. In its review, Greenopia claims EVOS is "arguably the greenest burger chain in the U.S."

76. Rising Roll Gourmet
Atlanta / No. of units: 10

Rising Roll Franchising LLC plans to launch an express version of the concept for airport, university and hospital locations. The idea to create an express version came after an office management company approached Rising Roll president Mike Lassiter and asked him to put it in other office buildings. The first Rising Roll Gourmet Express opened in early 2009 in Atlanta.

77. Bread & Company
Nashville, Tenn. / No. of units: 4

Bread & Company serves up fresh-baked bread at the concept's four units and is so popular it has a cult-like following in its hometown of Nashville. Fans rave about the fresh ingredients and unusual bread, like its Iroquois sandwich with Almond-Tarragon Chicken Salad on Cranberry Pecan Bread. The bread is the base for the chain's extensive menu, which includes the option of create-your-own sandwiches.

78. Back Yard Burgers
Nashville / No. of units: 120+

At 27 years old, the better burger chain is almost like a grandfather in the category compared to some newer upstarts. With new media partner Paramore|Redd Online Marketing, the company recently relaunched its Web site and kicked off a social media campaign. Via Facebook and Twitter, the company is aggressively marketing its brand to spread the word about its homemade style burger and chicken sandwiches in an effort to engage loyal fans and gain new ones.

Rising Roll Gourmet

79. Sandella's Flatbread
No of units: 150+ worldwide

In addition to opening its first location in Dubai, Sandella's Flatbread opened up San Diego County in the United States for franchise opportunities last year. The company also signed a franchise deal for three restaurants in Ohio. In 2009, Sandella's opened six new locations to in Houston; Dubai, United Arab Emirates; Washington, D.C.; Fargo, N.D.; Urbana, Ill.; and Aliso Viejo, Calif.

Sandella's Flatbread

80. Capriotti's Sandwich Shop
Las Vegas / No. of units: 55

This gourmet sandwich chain started as a shop in the Little Italy area of Wilmington, Del., more than 30 years ago. The concept found its niche in roasting fresh, whole turkeys overnight for sandwiches. A successful franchising program proved the chain was just as successful in Las Vegas as in its home state. Capriotti's has expanded to 10 states and has plans to open franchises in 20 major cities across the United States within the next five years.

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