

ConcepTrac™

Continuous Tracking of Emerging Restaurant Chains

April 2010

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By Lauren Edwards, Associate Editor

Gourmet Burger Chains Boast Fast-Casual Prices, FSR Settings

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The burger segment shows no signs of slowing down. After all, by many accounts, Americans eat more hamburgers than any other type of food—more than 14 billion burgers annually. The last time we visited the category, we focused on niche burger concepts with limited-service platforms and a notable point of differentiation—for example, **Smashburger**, which styles itself a “better burger” concept and uses 100% Angus beef and premium ingredients. Now, some 18 months later, it is clear that the burger category continues to expand with the introduction of countless new concepts, many of which have gone Smashburger’s better-burger route and represent a step up from QSRs, both in terms of price point and the quality of the overall dining experience. In addition, the category has diversified with the emergence of an interesting sub-segment: restaurants that specialize in premium burgers with gourmet toppings, offered at fast-casual prices and served up in high-end, FSR-like settings. These concepts typically have adult-beverage programs, which, combined with the upscale décor, make it crystal clear to customers that they’re not the equivalent of **McDonald’s** or **Burger King**. **Blanc Burgers + Bottles** operates two units in the greater Kansas City area. The concept sets itself apart in a number of ways. Notably, Blanc Burgers offers full service at fast-casual prices. To complement its 15 gourmet burgers, it offers an extensive selection of bottled sodas and beers as well as wine—some 220 drink selections in all—poured at an all-white bar that matches the trendy setting and contemporary décor. **Blazing Onion Burger Company** is a three-store concept operating in Washington State. It combines counter ordering with full table service provided by every member of the waitstaff (as opposed to a single server). The concept offers full bar service; units feature TVs tuned to sporting events, making Blazing onion a lower-priced alternative to sports bars. **Bobby’s Burger Palace**, the latest concept from celebrity chef Bobby Flay, operates four units in the Northeast. Customers order at a counter before seating themselves in a brightly colored dining area with long, communal tables and diner-style counter seating. Two of the four restaurants serve alcohol, which can boost check averages to as much as \$16—on par with casual-dining establishments. Finally, **Shake Shack**, with three units throughout the New York City metro area, represents multi concept restaurateur Danny Meyer’s first fast-casual concept. Shake Shack operates in three very different milieus: in the middle of Madison Square Park, in a street level site on the Upper West Side and at Citi Field in Queens. The concept’s small lineup of burgers is complemented by frozen custard as well as beer and wine—a straightforward menu of perennial American comfort foods, which resonate strongly with consumers during tough economic times. Clearly, the burger category is continuing to evolve to meet the needs of increasingly discriminating restaurant-goers who want full service dining experiences at wallet-friendly prices.

Concepts in Action

Blanc Burgers + Bottles

4710 Jefferson St.

Kansas City, MO 64112

816/931 6200

Number of Units: 2

Segment: Full Service

www.blancburgers.com

www.circlerestaurants.com

Parent: Circle Restaurant Group

(privately held)



Blanc's Burgers + Bottles' two units operate in the greater Kansas City area. The newest unit is located in Kansas City's upscale shopping area, The Plaza.

Better burgers with gourmet toppings, together with a large selection of bottled beers and sodas, form the cornerstones of Blanc Burgers + Bottles. The concept further differentiates itself by making its own condiments—ketchup, mustard and aioli—onsite daily; the three sauces are presented to customers in small three-section serving dishes. The concept's extensive alcoholic and non-alcoholic beverage selection includes more than 50 types of bottled sodas and other nonalcoholic drinks, 120 types of beer, and more than 50 types of wine. Food and drink are served in a contemporary, mostly white space that marries hard-edged industrial elements with elements from nature, such as bamboo. Blanc Burgers prides itself on its buy-local philosophy, which has led to alliances with other Kansas City companies. Blanc serves beer-battered onion rings made with beer from local Boulevard Brewing Co., and brioche and wheat buns baked fresh daily by area bakery Farm to Market Bread. Blanc Burgers + Bottles exemplifies two major industry trends: better burgers with gourmet toppings and local sourcing. That combination differentiates the concept from the rest of the “better burger” crop.

Inside the Menu

The menu kicks off with a handful of starters, including cheese curds, flash-fried Peppadew peppers and fried calamari. Although a few entrée salads are on offer, the main menu attraction is the concept's line of 14 gourmet burgers, the majority prepared with a half-pound of what's billed as “premium vintage natural beef.” Gourmet burger toppings include green peppercorn sauce, truffle butter and made-from-scratch ketchup. Each burger comes with a housemade pickle. Menu highlights include:

American Kobe Burger—with port wine-infused onions, truffle butter, mustard, aioli and watercress on a salt-and pepper brioche bun (\$12)

Inside Out Burger—with bleu cheese-stuffed beef, smoked bacon, onion rings, ketchup, mustard and butter lettuce on an onion brioche bun (\$10)

Au Poivre Burger—with pepper-crusted beef, watercress, green peppercorn sauce and grilled onions on a salt-and pepper brioche bun (\$9)

Grilled Mahi Mahi Burger—with house made pickles, dill tartar sauce and napa cabbage on a sesame brioche bun (\$10)

Spiced Lentil Burger—with curried lentils and vegetables, spiced yogurt, cucumber-onion salad, avocado and radish sprouts on a bun flavored with Boulevard Unfiltered Wheat beer (\$7)

“À La Cart” Sides—choice of Hand-Cut Fries, Truffle Fries, Sweet-Potato Fries or Boulevard Pale Ale Onion Rings, (\$4–\$5) Blanc Burgers + Bottles serves its fries and onion rings “à la cart,” meaning that instead of being served on a plate or in a basket, the items are served in miniature tabletop shopping carts. Dessert options include artisanal chocolates and frozen-custard shakes and floats, including a create-your-own float option. Blanc Burgers also offers a Quick Fix menu during weekday lunch hours and after 10 p.m. every day; it includes a choice of burger and a choice of side or salad. Given that “bottles” are promised in the concept’s name, it makes sense that Blanc Burgers + Bottles offers a large beverage list, including both non-alcoholic and alcoholic options.



The management team at Blanc Burgers +Bottles sums up its interior design with the phrase “white and contemporary.” Bold orange accents inject the modern industrial space with added color.

Company Characteristics

Ernesto Peralta Jr. and several partners established Blanc Burgers + Bottles in Kansas City’s Westport entertainment district in early 2008. A second unit followed in early 2009 at Mission Farms in suburban Leawood, KS. In early 2010, Peralta and company closed the original location in Westport and relocated to a larger location on the Country Club Plaza in Kansas City. Peralta has said that he envisions Blanc Burgers + Bottles as a Midwest brand with outposts in cities such as Omaha, NE; Des Moines, IA; and St. Louis. The Country Club Plaza location operates in a 5,300-squarefoot space that formerly housed an Uno Chicago Grill restaurant. It is nearly three times the size of the original Westport restaurant. The newest unit offers seating for about 200 guests, which includes seating for 25 at the bar and 40 on at outdoor patio. Seating is provided via white-plastic chairs with woven backs and silver legs as well as un-cushioned white tables and booths. The Plaza unit also includes two private party rooms. Inside, Blanc Burgers + Bottles restaurants feature sleek, contemporary and industrial elements. The color palette is mostly orange and white. Tables and chairs are white, but there are bursts of color in the form of orange accent walls and exposed red brick. A combination of large windows and track and recessed lighting contribute to make for a brightly lit space. Giant stocks of bamboo are found in the main dining room. The earthy touch is juxtaposed with industrial construction elements such as exposed ductwork and gray cement floors. Found in both units is a white bar whose shelves display liquor and soft drink bottles bathed by ever-changing colored lights. Flat-screen TVs in the bar area provide patrons with in-house entertainment. Restaurants interiors are designed by Peralta’s wife, Jennifer Price. Restaurants are open daily for lunch and dinner daily and late night dining on the weekends. Takeout and catering services are also offered. The management team reports that lunchtime check averages are \$11 and dinnertime check averages range from \$15–\$20. Average unit volumes are estimated to range from \$2.9–\$3.1 million. Key management includes Peralta, co-owner; Price, designer; Josh Eans, executive chef and partner; and David McMullin, beverage director and partner.

Concepts in Action

Blazing Onion Burger Company

15115 Main St.

Mill Creek, WA 98012

425/338 4445; Fax: 425/338 4446

www.blazingonion.com

Segment: Modified Full Service

Number of Units: 3

Parent: Blazing Onion Burger Company
(privately held)



Blazing Onion Burger Company restaurants are freestanding and average 4,500 square feet. An extensive outdoor seating area is found at the original location in Mill Creek, WA.

Operating three units in northern Washington State, Blazing Onion Burger Company is a “better burger” concept that began with the idea that fast food could be good food. The concept differentiates itself with an unusual service platform that blends fast-casual counter ordering with table service. Patrons order at a large ordering counter complete with giant menu board before seating themselves in the dining room or at the bar. However, instead of being served by a dedicated server, as they would be at a full-service restaurant, customers are served by any staff member acting as a table runner. Each table is equipped with a “Service Alert” stop sign. When guests require service, they place the sign on the condiment holder atop their table; whichever staff member is closest assists the dining party. The management team calls the practice “service on demand.” The concept’s full-service bar, combined with its numerous TVs, makes it a welcoming environment for younger adults, particularly sports enthusiasts and customers looking for a place to grab some drinks and socialize with friends.

Inside the Menu

The Blazing Onion menu centers on gourmet burgers, most of which are prepared with $\frac{1}{3}$ pound of ground all-natural, 100% ground chuck. Many of the burgers are topped with a proprietary seasoned sauce dubbed BOB Sauce. Three alternative proteins—chicken breast, turkey patty and veggie patty—are on offer and may be substituted for the beef for the same price. The five types of burger buns used at Blazing Onion are baked at a Seattle-area bakery, Coeur d’Alene French Baking company, and delivered daily. Burgers are served with all-you-can-eat fries, which are prepared using a European cooking process wherein fries are first cooked with steam before being quickly fried in zero-trans-fat oil. Customers may elect to switch out the fries for beer-battered onion rings, sweet-potato fries or any combination of the above. For an additional cost, they can substitute house salad or chili. In addition to some two-dozen burger varieties, the menu also features specialty sandwiches; seafood, steak and chicken dinners; salads, soups and chili; and appetizers. A sample of entrées includes: **Blazing Onion Burger**—with Cheddar, lettuce, tomatoes, pickles, grilled onions and BOB Sauce on an onion and cheese kaiser roll (\$8.49)

Kung Fu Burger—with Swiss cheese, pineapples, teriyaki sauce, lettuce, tomatoes and POW Sauce (wasabi mayonnaise) on a kaiser roll (\$8.79)

Wild Boar Burger—with wild boar, Cheddar, coleslaw, onion straws, BOB Sauce and barbecue sauce on an onion and cheese kaiser roll (\$9.99)

Crispy Cod Burger—beer-battered cod, shredded cabbage and housemade tartar sauce on a kaiser roll (\$9.49)

Pastrami Reuben—Swiss cheese, pastrami, sauerkraut and BOB Sauce between slices of marbled rye bread (\$9.49)

Chicken-Fried Steak Dinner—chicken-fried steak smothered in country gravy, served over garlic mashed potatoes along with a choice of house salad or soup and garlic cheese bread (\$11.99)

The dessert menu showcases an ice-cream cookie sandwich, apple turnover, New York cheesecake, milkshakes and sundaes. Nonalcoholic beverages include Coca-Cola-brand soft drinks, Jones brand soda, bottled water, milk and fair-trade coffee. Full bar service is offered, including regional wines and numerous draught beers. A Little Blazers kids' menu offers chicken strips, mini-cheeseburgers, macaroni-and-cheese wedges and a jumbo hot dog.



Despite the fact that Blazing Onion offers counter ordering via a large menu board, the concept actually offers full table service. The interior of the Snohomish, WA, unit features medium woods, stone accents and abundant natural lighting.

Company Characteristics

Husband-wife duo David and Lorri Jones, who had been longtime Subway franchisees in the Pacific Northwest before they decided to go into business for themselves, launched Blazing Onion Burger Company in early 2007 in Mill Creek, WA. A second unit followed in Snohomish, WA. The most recent unit opening was in the fall of 2009 in Gig Harbor, WA. In late March, the management team at Blazing Onion inked a deal with multi concept franchisor Beautiful Brands International (BBI) to begin franchising the concept. The agreement calls for BBI to open some 100 Blazing Onion units. Initial growth will likely be focused in the Pacific Northwest. Units are freestanding and located in proximity to high-end strip malls, often sharing the same parking space. They are reported to average 4,500 square feet. Exteriors are typically constructed with a combination of red brick and beige stone; they are accented by and feature black trim and black-metal awnings. Inside, seating is divided into several distinct areas. The Gig Harbor unit's total seating capacity is about 220, which is broken down into 80 seats in the indoor dining room, 80 seats in the indoor full-service bar area, 30 seats at the outdoor bar area and 30 at the outdoor patio area. Seating is a mixture of upholstered leather booths and leather-cushioned light wooden chairs. Interiors feature neutral colors marked by wood-trimmed beige walls with medium wooden trim, caramel-colored tiled floors and light stone accents, with the latter incorporated into the built-in fireplaces found inside every restaurant. Floor-to-ceiling windows contribute to a brightly lit space that let in plenty of outside light. Numerous interior windows provide customers with views into the kitchen. At the Gig Harbor restaurant, there are some 14 HD TVs in the dining area and bar, as well as an additional two TVs in the bathrooms. Walls are adorned with framed, colored photographs, mainly of the local area, as well as historical black-and-white photographs. Restaurants are open daily for lunch and dinner, offering counter service. Customers may dine in or take their food to go. Check averages are reported to be \$12 for lunch and \$15-plus for dinner. Average unit volumes are estimated to be \$3–3.2 million. Key management includes David Jones, co-founder.

Concepts in Action

Bobby's Burger Palace

1140 Broadway, Room 1203

New York, NY 10001

212/460 0928

www.bobbysburgerpalace.com

Number of Units: 4

Segment: Limited Service

Parent: Bold Food, LLC (privately held)



Three of the four Bobby's Burger Palace units are located in high-visibility areas within shopping malls. To many of its loyal customers, the concept is known simply as BBP—a moniker that is displayed on signage at the entrance of restaurants.

Restaurateur Bobby Flay's newest concept, Bobby's Burger Palace, features a straightforward, back-to-basics menu that centers on a dozen gourmet burgers, sandwiches, salads, fries and milkshakes. The fast-casual concept offers counter ordering, self-seating and table delivery. Seating is provided via long, communal tables and counter style seats that call to mind old-fashioned diners while contributing to a shared dining environment that encourages strangers to chat over burgers, milkshakes and malts. Two of the four units serve beer, wine and margaritas. The serving of adult beverages, combined with a retail area where BBP's proprietary sauces and rubs are available for sale, help to boost check averages at this affordably priced concept that draws on the star power of Bobby Flay.

Inside the Menu

The main attractions at Bobby's Burger Palace are the griddled burgers inspired by distinct cities and regions across the U.S. They are prepared with Certified Angus chuck lightly seasoned with kosher salt and freshly ground pepper and are completed with gourmet toppings. Any burger can be made with chicken breast or ground turkey instead of the chuck. At no extra cost, customers may request that their burger be "crunchified," with a stack of potato chips sandwiched between the patty and the bun. In addition to some 10 always-on-offer burgers, units also showcase a Burger of the Month. A snapshot of the menu reveals:

Crunchburger—with two slices of American cheese and potato chips (\$7.50)

Santa Fe Burger—with queso sauce, pickled jalapeños and blue corn chips (\$7.50)

L.A. Burger—with avocado relish, watercress, Cheddar cheese and tomatoes (\$7.50)

Philadelphia Burger—with provolone, griddled onions and hot peppers (\$7.50)

Griddled Cheese Deluxe—with Brie, goat cheese, tomato and bacon (\$7.50)

Crunch Salad—with chopped vegetables, romaine, crispy tortilla strips, white Cheddar and balsamic dressing (\$7.50)

Topless Burger Salad—any burger served on top of baby greens with balsamic dressing (\$8.50)

Burgers are served à la carte. Many customers order french fries, sweet-potato fries or beer-battered onion rings as an accompaniment. Beyond burgers and fries, the menu also includes a handful of sandwiches and salads as well as milkshakes, malteds and beverages. Milkshakes and malts are available in a choice of 10 flavors, including unusual options such as

pistachio and coconut. Non-alcoholic beverages include Coca-Cola products, Boylan's sodas, lemonade, iced tea and bottled water. In addition, two of the four units serve bottled beers, house wines by the glass, and frozen margaritas.



The interior of Bobby's Burger Palace restaurants feature bold colors and eye-catching accents. Swivel counter-style seating suggests a modern spin on classic diners of yesteryear. Long, shared tables contribute to a communal dining experience.

Company Characteristics

Bobby Flay launched Bobby's Burger Palace at Smith Haven Mall in Lake Grove, NY, in the summer of 2008. The venture was the latest in a series of restaurant concepts developed by the chef, restaurateur, cookbook author and TV personality, whose other concepts include Bar Americain, Mesa Grill and Bobby Flay Steak. A second Bobby's Burger Palace unit followed in Eatontown, NJ, in late 2008. Shortly thereafter, a third unit opened at the Bergen Town Center in Paramus, NJ. In mid-2009, Flay opened a fourth outpost at the Mohegan Sun, a casino, hotel and resort located in Uncasville, CT. In early January, Flay announced that a fifth Bobby's Burger Palace store would open in a new market: Philadelphia. An opening date has not been disclosed for the new unit, which is scheduled to open at 3925 Walnut Street at The Radian, a student apartment community located near the University of Pennsylvania. Beyond that, future expansion plans have not been revealed. Units can be freestanding or within shopping malls. The Mohegan Sun casino outpost is the largest, operating in a 4,100-square-foot space. Other units are estimated to range from 2,000–2,400 square feet. Units are divided into three areas: a small adult-beverage bar, an ordering counter and the dining room. Décor throughout is contemporary and colorful. Seating for about 75 guests is provided via lime lime-green-leather armless swivel chairs. Guests eat at curved wooden counters that face the kitchen or at a handful of long, glossy wooden communal tables; both seating options contribute to a shared dining environment that encourages interaction amongst guests. The kitchen is mostly hidden, although a long, rectangular opening provides a limited view inside. Back-of-house employees pass customers' food through an opening on the counter; through the opening, runners pick up the food and deliver it to customers' tables, all without leaving the dining area. Atop tables are condiment trays that feature BBP's four proprietary sauces: chipotle ketchup, yellow mustard, jalapeño and burger sauce. The same sauces are also available for retail purchase near the ordering counter. Décor is contemporary and colorful, with lime-green or red-brick walls. The accent walls are adorned with contemporary artwork consisting of brightly colored swirly shapes in vibrant colors against a white background. Lighting illumination is a mixture of track lighting and giant oversized bulbs that hang suspended on thin wire chords. Check averages are estimated to be from \$12.50–\$13.50. Average unit volumes are estimated to be \$2 million. Key management includes Flay, founder.

Concepts in Action

Shake Shack

24 Union Square East

New York, NY 10003

212/228 3585

Segment: Limited Service

Number of Units: 3

<http://shakeshack.com>

www.ushgny.com

Parent: Union Square Hospitality Group



Shake Shack's flagship unit is located in the center of Madison Square Park in New York City. The concept also operates in a street-level storefront location on the upper West Side.

Styling itself a “modern-day roadside burger stand,” Shake Shack is restaurateur Danny Meyer’s first foray into the fast-casual realm; his other portfolio concepts are all fine-dining establishments. Shake Shack offers classic American fare—burgers, fries and milkshakes—at moderate prices. An environmentally conscious concept, Shake Shack employs a number of eco-friendly practices, including offsetting 100% of its energy use through sustainable wind power credits; planting trees; using sustainable materials in unit construction; and recycling grease into biodiesel.

Inside the Menu

Shake Shack’s limited menu is anchored by a small selection of gourmet burgers, all but one prepared with ground antibiotic- and hormone-free Black Angus beef. Burgers are served plain unless customers request specific toppings and condiments. The menu also includes a handful of hot dogs, including the concept’s take on the classic Chicago-style dog. Burgers and hot dogs are served à la carte, with french fries a commonly ordered side item. Menu offerings include:

ShackBurger—with American cheese, lettuce, tomatoes and Shack Sauce (single, \$4.75; double, \$7.25)

Hamburger (single, \$3.75; double, \$5.75)

Cheeseburger (single, \$4.25; double, \$6.75)

’Shroom Burger—a vegetarian burger featuring a fried portobello mushroom filled with melted Muenster and Cheddar, topped with lettuce, tomatoes and Shack Sauce (\$6.75)

Shack Shack—a cheeseburger and a ’Shroom Burger topped with lettuce, tomatoes and Shack Sauce (\$8.75)

Shack-cago Dog—Vienna all-beef hot dog on a poppy-seed bun, topped with mustard, Rick’s Picks Shake Shack Relish, onions, cucumbers, pickles, tomatoes, sport peppers and celery salt (\$4.25)

French Fries—made from Yukon Gold potatoes, fried in trans fat-free oil (\$2.75; with cheese, \$3.75)

Dessert options center on frozen custard, available in vanilla, chocolate and the flavor of the day. Customers may choose to order frozen custard in shakes, cups, cones, sundaes, to-go pints, or the concept’s signature concretes (frozen custard blended at high speed with a choice of mix-ins for a dense texture). The list of beverages includes Coca-Cola products, fresh-squeezed lemonade, fresh-brewed iced tea, a lemonade-iced tea mix (Arnold Palmer), Abita Root Beer and bottled water. Also available is a small selection of bottled and draught beers as well as wines by the glass.



As a fast-casual concept, Shake Shack has its customers peruse a menu board before ordering at a counter. The Columbus Avenue unit in New York City features what the management team calls a "sidewalk shed," or a glass-enclosed dining area.

Company Characteristics

Shake Shack is the brainchild of Danny Meyer, a veteran restaurateur who has created 11 restaurant concepts that operate under the umbrella of his MCO, Union Square Hospitality Group (USHG). Meyer is often best known for his fine-dining concepts, especially Gramercy Tavern and Union Square Café, both of which are located in New York City. After deciding to create a more affordably priced concept, Meyer launched Shake Shack, which debuted in New York's Madison Square Park in 2004. Bucking his longstanding habit of forgoing expansion in favor of single-unit concepts, Meyer elected to add a second Shake Shack unit, which opened on Columbus Avenue on Manhattan's Upper West Side in 2008. A third outpost followed at Citi Field in Flushing, Queens—home of the New York Mets. In the fall of 2009, USHG announced that it intended to open its fourth systemwide store, at the intersection of Prince and Mulberry streets in the Nolita neighborhood of New York City. However, strong opposition from many of the neighborhood's residents prompted USHG to withdraw plans to operate in that site. The company has since amended its expansion plans for the Big Apple. This year, two more New York outlets are scheduled to open, the first at 8th Avenue and 44th Street the base of the InterContinental in the city's theater district, and the other will be located between Lexington Avenue and 3rd Avenue on the Upper East Side. Also on the horizon for the concept is the opening of its the first out-of-state unit, which is scheduled to open this year in Florida, in a storefront site on the Lincoln Road pedestrian promenade in Miami. All U.S. Shake Shacks in the U.S. are and will be company-owned. In addition, the company is prepping for the opening of its first international Shake Shack store, which is scheduled for a 2010 opening in Kuwait City, Kuwait. The Kuwait City unit will be managed by franchise group Alshaya, a local multi concept operator whose portfolio includes a number of U.S.-based chains. Meyer has called Shake Shack his company's primary vehicle for growth. Units operate using very different prototypes. The flagship Madison Square Park unit operates in a freestanding gray building that is estimated to be less than 700 square feet. It features counter service and no interior seating. Customers sit in one of many nearby chairs in an open-air seating area. Standing in contrast to the flagship store is the Columbus Avenue store. That store operates in a street level end cap site with interior seating. That unit features a distinctive element that the management team calls a glass "sidewalk shed," which functions as an indoor café. Customers are able to sit in a glass-enclosed space just inches from the sidewalk and watch cars and passersby as they eat. Union Square Hospitality Group reports that Shake Shack's per person check averages are \$13. Average unit volumes are estimated to range from \$2.2–\$2.4 million. Key management includes Meyer, founder; David Swinghmer, CEO; and Theresa Mullen, director of public relations.

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We welcome your comments.

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