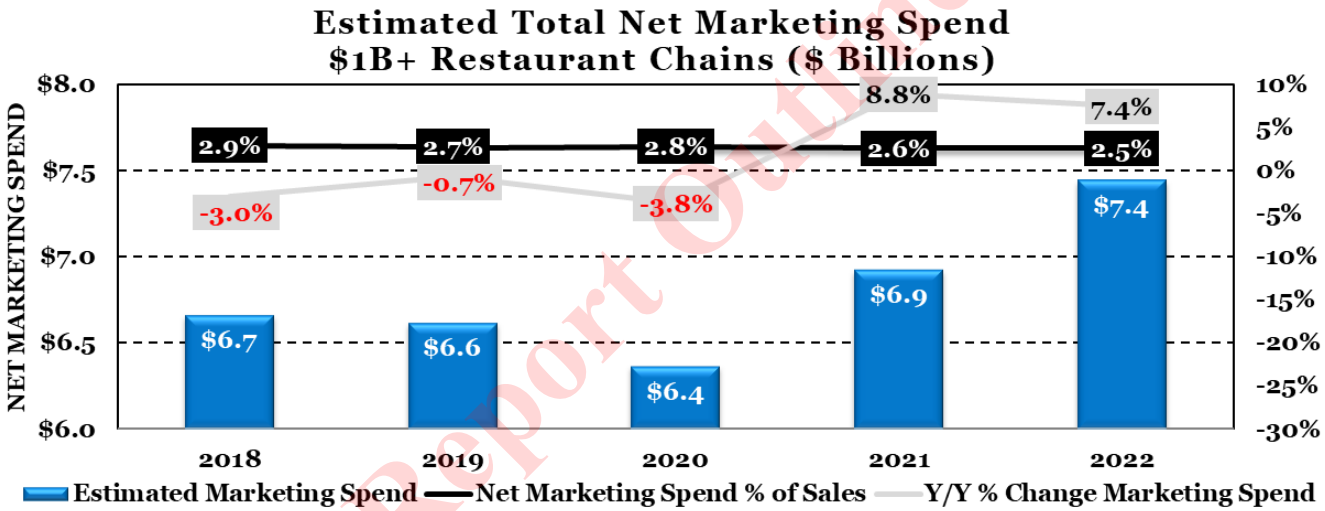
Marketing Spend

- Total 2022 net marketing spend for the $1B+ Chain restaurants increased +7.4% y/y to $7.4B, reflecting +9.2% systemwide sales growth partially off-set by lower net marketing spend as a percent of sales which has steadily declined from 3.2% in 2016 to 2.5% in 2022 (partially reflecting that full-serve chains have sharply curtailed their ad spend post-covid).
- Chain restaurants have been losing their share of voice as their total net restaurant marketing spend as a % of total domestic marketing spend across all industries declined from 2.9% in 2017 to 2.3% in 2022.
- Further, a relatively high level of creative ad agency turnover is notable with 10 chains switching creative ad agencies over the last 12 months (Bob Evans, Buffalo Wild Wings, Church's, Domino's, Dunkin', Krispy Kreme, Papa John's, Popeyes, T.G.I. Friday's, Wingstop).
- While digital marketing[1] across all domestic industries grew +7% y/y during 2022 (to a 49.1% mix of total marketing spend), growth slowed to +2.4% for the LTM 9/30/23 period.
- Also, several chains have increased and/or reallocated more funds to support more cost-effective national advertising in 2023 as marketers look to increase their marketing ROI.



Report Outline

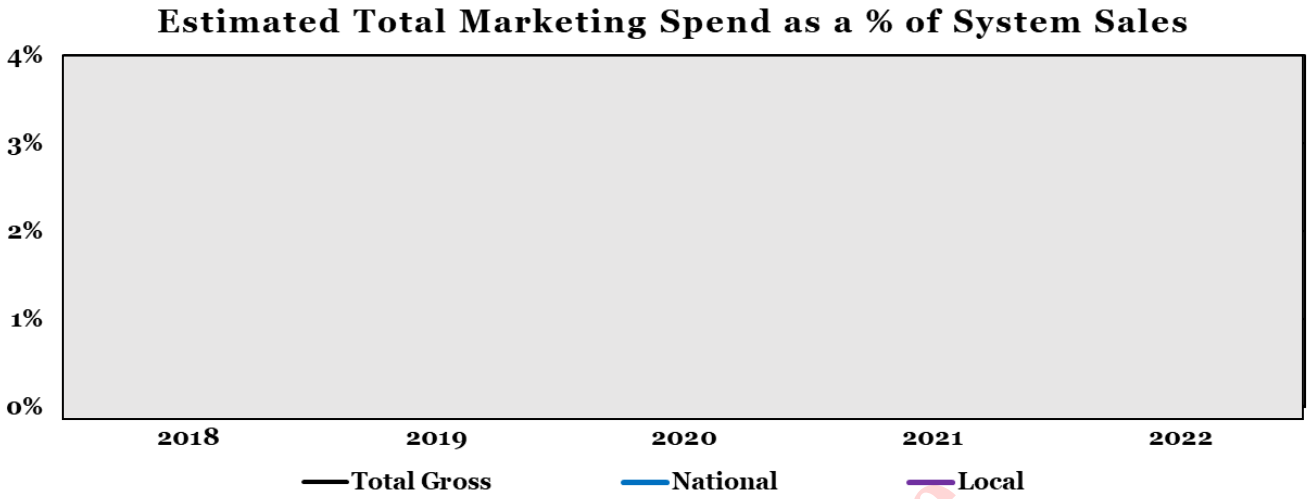
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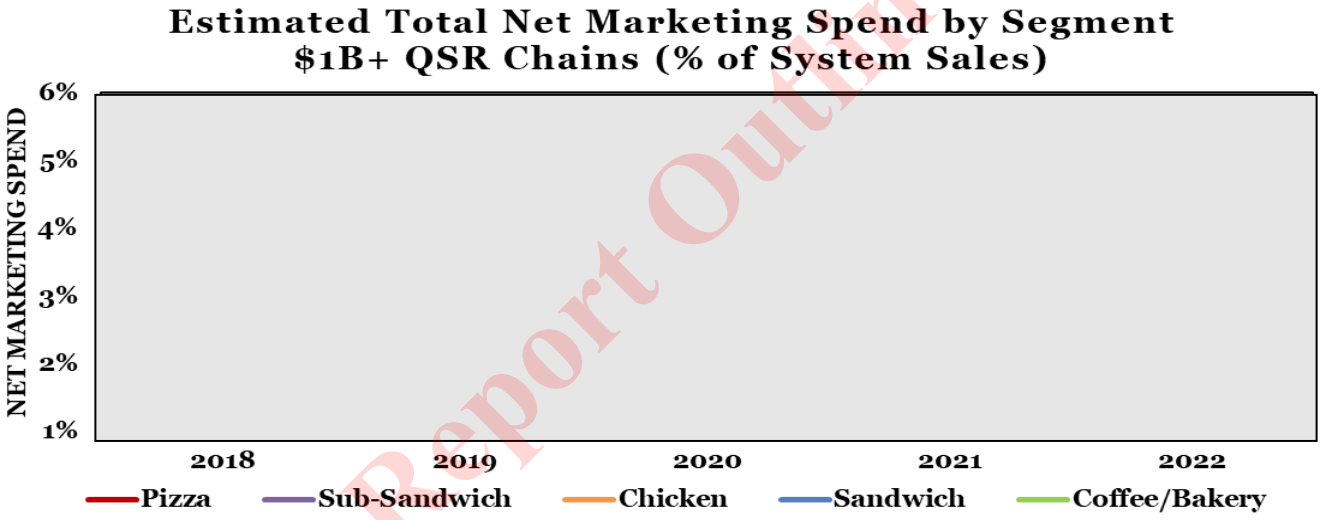
Data in spreadsheet form available at http://www.ChainRestaurantData.com

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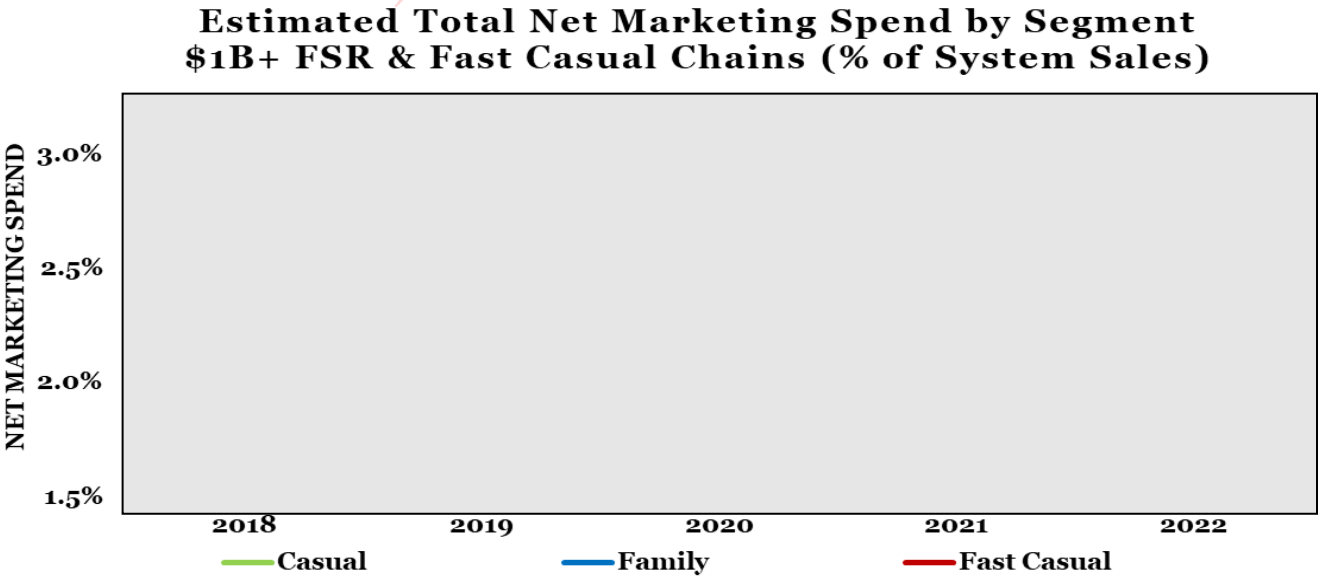
[1] Digital marketing based on U.S. ad revenue for Alphabet, Meta (Facebook/Instagram/Messenger/WhatsApp), Twitter & Snap.

Changes to Marketing Allocations by Segment





Report Outline



Changes to Marketing Spend Allocations (2022 – 2023)

Chain	Changes to Marketing Allocations				
	Effective Date	National	Local/ Co-op	Net Budget Impact	Incremental 2022 Franchisor Contributions
Burger King [1]					
Chili's [2]					
Domino's [3]					
Firehouse Subs [4]					
Little Caesars [5]					
Moe's [6]					
Panera [7]					
Qdoba [8]					
TGI Friday's [9]					
Wendy's [10]					
Wingstop [11]					

Report Outline

Changes to Creative Ad Agencies

•

Creative Ad Agency of Record

Chain	Agency	Year Hired		Chain	Agency	Year Hired

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$1B+ Chain Marketing Summary
(Ranked by Estimated 2022 U.S. Net Marketing Spend)

Chain	Gross Store Level Marketing Contributions				Incremental Franchisor Contributions	Total Marketing Admin [1]	2022 Net Marketing Spend	
	National/ Brand Fee	Local/ Co-op	Support/ Admin.	Total Gross			% of Sales	Spend ($ MM)
McDonald's								
Taco Bell								
Wendy's								
Burger King								
Sonic Drive-In								
Arby's								
Dairy Queen								
Jack in the Box								
Chick-fil-A								
Hardee's								
Carl's Jr.								
Culver's								
Zaxby's								
Checkers/ Rally's								
Del Taco								
Five Guys								
Sandwich								
Domino's								
Pizza Hut								
Papa John's								
Little Caesars								
Pizza								
Starbucks								
Dunkin'								
Dutch Bros Coffee								
Krispy Kreme								
Tim Horton's								
Coffee/Bakery								
KFC								
Popeyes								
Wingstop								
Bojangles'								
Church's								
Chicken								
Subway								
Jersey Mike's								
Jimmy John's								
Firehouse Subs								
Sub-Sandwich								

Report Outline

Restaurant Research®

$1B+ Chain Marketing Summary
(Ranked by Estimated 2022 U.S. Net Marketing Spend)

Chain	Gross Store Level Marketing Contributions				Incremental Franchisor Contributions	Total Marketing Admin (1)	2022 Net Marketing Spend	
	National/ Brand Fee	Local/ Co-op	Support/ Admin.	Total Gross			% of Sales	Spend ($ MM)
Applebee's								
Buffalo Wild Wings								
Outback								
Olive Garden								
Red Robin								
LongHorn								
Texas Roadhouse								
BJ's Restaurants								
T.G.I. Friday's								
Cheesecake Factory								
Chili's Grill & Bar								
Casual								
Chipotle								
Panera Bread								
Moe's Southwest Grill								
Qdoba								
Fast Casual								
IHOP								
Cracker Barrel								
Denny's								
Golden Corral								
Perkins								
Family								
Total								

(1) Total marketing administrative expense = mandated support/administrative fees + total national/brand fund production/ administrative expenses (included in the gross national/brand fee % requirement).

Report Outline

Restaurant Research®

Net Marketing Spend $MM by Chain (2018 - 2022)

Ranked by $ Change in Estimated 2022 U.S. Net Marketing Spend

	Net Marketing Spend $ Millions					Net Marketing Spend % System Sales					Change '22/'21	
Chain	**2018**	**2019**	**2020**	**2021**	**2022**	**2018**	**2019**	**2020**	**2021**	**2022**	**$ Spend**	**% Spend**
McDonald's												
Taco Bell												
Burger King												
Chick-fil-A												
Culver's												
Arby's												
Zaxby's												
Wendy's												
Jack in the Box												
Carl's Jr.												
Five Guys												
Dairy Queen												
Checkers/ Rally's												
Hardee's												
Sonic Drive-In												
Sandwich												
Little Caesars												
Pizza Hut												
Domino's												
Papa John's												
Pizza												
Starbucks												
Dunkin'												
Krispy Kreme												
Tim Horton's												
Coffee/Bakery												
Wingstop												
Popeyes												
Bojangles'												
Church's												
KFC												
Chicken												
Jersey Mike's												
Subway												
Firehouse Subs												
Jimmy John's												
Sub-Sandwich												

Report Outline

Restaurant Research®

Net Marketing Spend $MM by Chain (2018 - 2022)

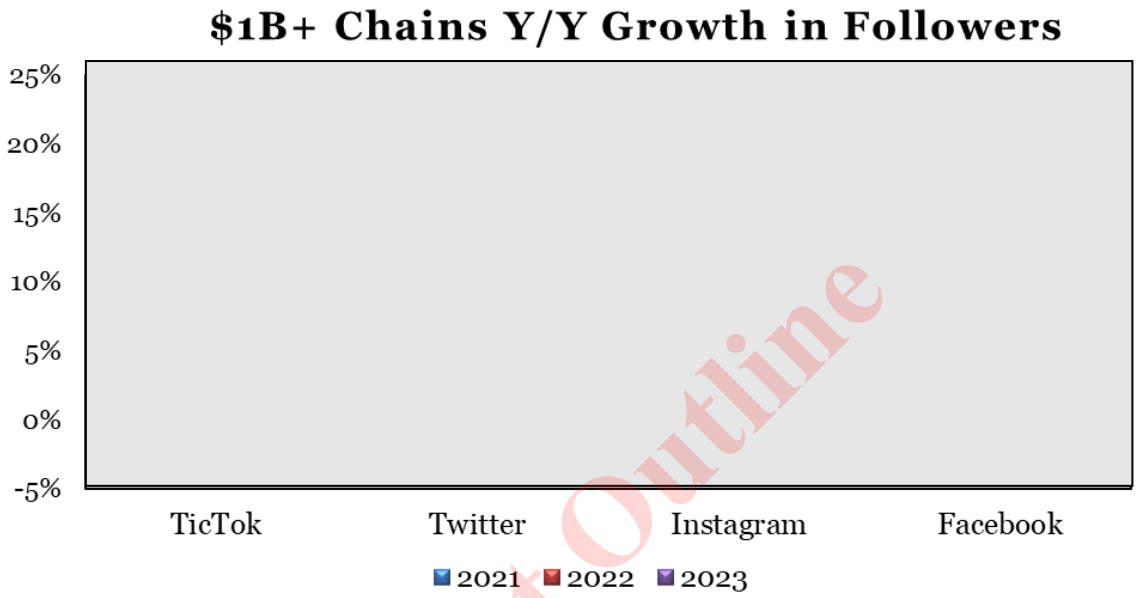
Ranked by $ Change in Estimated 2022 U.S. Net Marketing Spend

Chain	Net Marketing Spend $ Millions					Net Marketing Spend % System Sales					Change '22/'21	
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	$ Spend	% Spend
Applebee's												
BJ's Restaurants												
Texas Roadhouse												
Cheesecake Factory												
Buffalo Wild Wings												
Outback												
Red Robin												
T.G.I. Friday's												
Olive Garden												
Chili's Grill & Bar												
LongHorn												
Casual												
Panera Bread												
Chipotle												
Moe's Southwest Grill												
Qdoba												
Fast Casual												
Cracker Barrel												
Golden Corral												
IHOP												
Denny's												
Perkins												
Family												
Total												

Report Outline

Social Media Stats

-
-



Report Outline

$1B+ Chains 2023 y/y Follower Growth

Segment	TicTok	Twitter	Instagram	Facebook
Chicken				
Coffee/Bakery				
Family				
Sandwich				
Fast Casual				
Casual				
Sub-Sandwich				
Pizza				

Restaurant Research®

$1B+ Chains Social Media Followers

Ranked by Change in Facebook Followers (Dec. '23/Dec. '22)

Chain	Social Media Followers (Dec. '23)				Social Media Followers Y/Y % Change (Dec. '23/Dec. '22)			
	TikTok	Twitter	Instagram	Facebook	TikToc	Twitter	Instagram	Facebook
Checkers/ Rally's								
Wendy's								
Burger King								
Jack in the Box								
McDonald's								
Taco Bell								
Carl's Jr.								
Chick-fil-A								
Sonic Drive-In								
Whataburger								
Arby's								
Five Guys								
Culver's								
Dairy Queen								
Zaxby's								
Hardee's								
Sandwich								
Papa John's								
Little Caesars								
Pizza Hut								
Domino's								
Pizza								
Popeyes								
Bojangles'								
KFC								
Church's								
Chicken								
Jersey Mike's								
Firehouse Subs								
Subway								
Jimmy John's								
Sub-Sandwich								
Krispy Kreme								
Starbucks								
Tim Horton's								
Dunkin'								
Coffee/Bakery								

Report Outline

Restaurant Research®

$1B+ Chains Social Media Followers

Ranked by Change in Facebook Followers (Dec. '23/Dec. '22)

Chain	Social Media Followers (Dec. '23)				Social Media Followers Y/Y % Change (Dec. '23/Dec. '22)			
	TikTok	Twitter	Instagram	Facebook	TikToc	Twitter	Instagram	Facebook
Texas Roadhouse								
BJ's Restaurants								
Cheesecake Factory								
Applebee's								
Red Robin								
T.G.I. Friday's								
Chili's Grill & Bar								
Red Lobster								
Olive Garden								
Outback								
LongHorn								
Buffalo Wild Wings								
Casual								
Moe's Southwest Grill								
Corner Bakery Café								
Qdoba								
Panera Bread								
Chipotle								
Fast Casual								
Perkins								
Golden Corral								
Bob Evans								
Cracker Barrel								
IHOP								
Denny's								
Family								
Total								

Report Outline

Restaurant Research®

Restaurant Research Coverage

Concept Reports	Industry Data Reports
Applebee's	Restaurant Lending & 2nd Half Unit Valuations
Arby's	Ad Spending
Burger King	Menus & Promotions
Carl's Jr.	Unit Growth & Sales Analysis
Chili's Grill & Bar	Unit Economics
Church's	1st Half Unit Valuations & Lending Update
Denny's	New Build Costs & Franchise Fees
Domino's	Remodeling
Hardee's	
IHOP	**Databases & Special Reports**
Jack in the Box	RR Databook (Annual Data Summary 50+ Chains)
KFC	RR LTOverview (Monthly Promotions 50+ Chains)
McDonald's	FDD Library (40+ Chains)
Panera Bread	Concept Updates (Quarterly 20+ Public Chains)
Papa John's	Same Store Sales Database (Quarterly 25+ Chains)
Pizza Hut	New Store ROI Model
Popeyes	SBA Lending Database
Sonic Drive-In	
Subway	
Taco Bell	
Wendy's	**www.ChainRestaurantData.com**

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