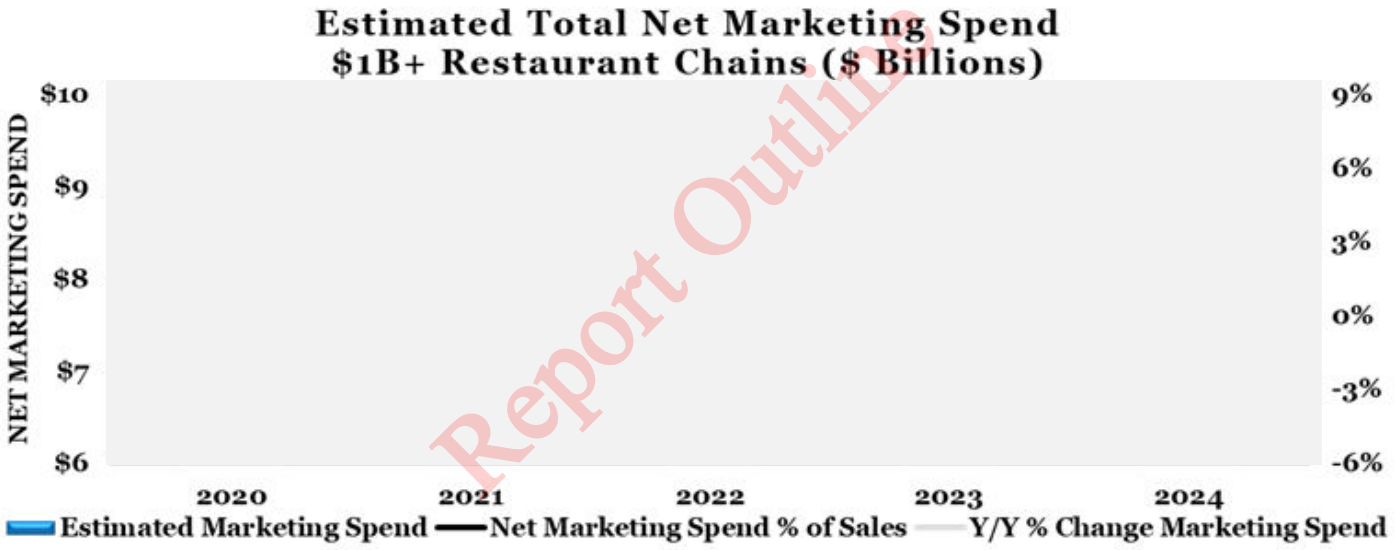
Restaurant Research®

Building Bridges between Franchisees, Franchisors & Financiers

Industry Data Report - Marketing Spend

- Total 2024 net marketing spend for the $1B+ Chain restaurants increased +5.1% y/y to $8.0B, reflecting +2.5% systemwide sales growth coupled with a slight increase in net marketing spend as a percent of sales (+0.06% to 2.49% in 2024).
- In general, the $1B+ Chain restaurants have been cutting back on marketing expenditures since 2017 when total net restaurant marketing spend as a % of systemwide sales peaked at 3.1% (compared to 2.5% in 2024).
- The pizza segment experienced the most significant decline in marketing spend during 2023 & 2024 (down 1% since 2022) which came out of local/co-op marketing budgets.
- Agency turnover remains elevated with 10 chains switching creative ad agencies over the last 12 months (Cracker Barrel, Dairy Queen, Firehouse Subs, Panera, Pizza Hut, Qdoba, Red Robin, Starbucks, Subway and Zaxby's) while Arby's is under review and IHOP moved its creative in house.
- Notably, several chains plan to increase and/or reallocate additional funds to support more cost-effective national advertising and digital media in 2025 as marketers seek 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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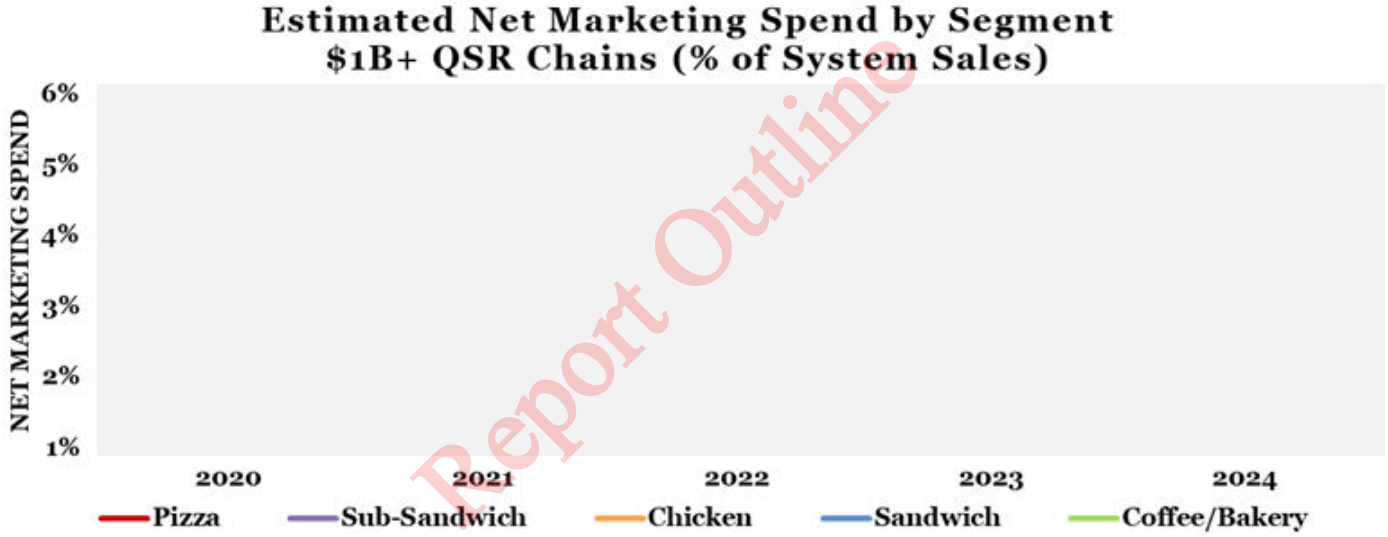
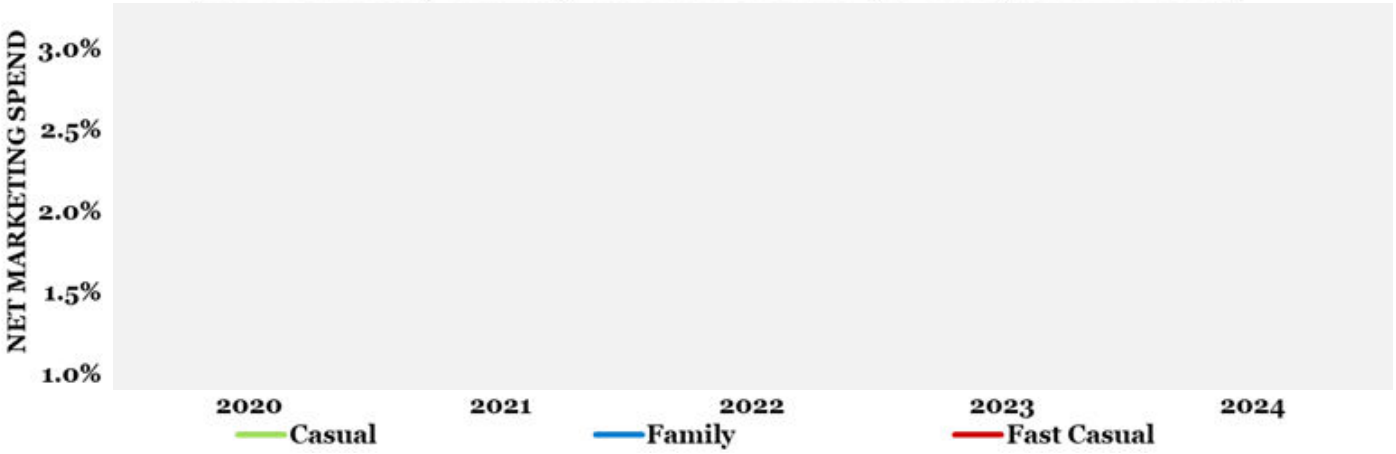
Changes to Marketing Allocations by Segment





Report Outline



Changes to Marketing Spend Allocations (2024 – 2025)

Chain	Changes to Marketing Allocations				
	Effective Date	National	Local/ Co-op	Net Budget Impact	Incremental Franchisor Contributions
Buffalo Wild Wings [1]					
Burger King [2]					
Checkers [3]					
Chili's [4]					
Denny's [5]					
Domino's [6]					
McDonald's [7]					
Panera [8]					
Papa John's [9]					
Popeyes [10]					
Qdoba [11]					
Wendy's [12]					
Wingstop [13]					

Report Outline

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Concept	Company Comments on Digital Marketing Strategies
Applebee's	
Carl's Jr.	
Chili's	
Chipotle	
Domino's	
Dunkin'	
Dutch Bros.	
IHOP	
KFC	
McDonald's	
Papa John's	
Red Robin	
Sonic	
Starbucks	
Wingstop	
Yum! Brands	

Report Outline

Changes to Creative Ad Agencies

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Creative Ad Agency of Record

Chain	Agency	Year Hired	Chain	Agency	Year Hired
Applebee's			Jimmy John's		
Arby's			KFC		
BJ's Restaurants			Krispy Kreme		
Bojangles'			Little Caesars		
Buffalo Wild Wings			LongHorn		
Burger King			McDonald's		
Carl's Jr.			Moe's Southwest		
Checkers/ Rally's			Olive Garden		
Cheesecake			Outback		
Chick-fil-A			Panera Bread		
Chili's Grill & Bar			Papa John's		
Chipotle			Perkins		
Church's			Pizza Hut		
Cracker Barrel			Popeyes		
Culver's			Qdoba		
Dairy Queen			Red Robin		
Del Taco			Sonic Drive-In		
Denny's			Starbucks		
Domino's			Subway		
Dunkin'			T.G.I. Friday's		
Dutch Bros Coffee			Taco Bell		
Firehouse Subs			Texas Roadhouse		
Five Guys			Tim Horton's		
Golden Corral			Wendy's		
Hardee's			Whataburger		
IHOP			Wingstop		
Jack in the Box			Zaxby's		
Jersey Mike's					

Recent Creative Ad Agency Changes

Report Online

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$1B+ Chain Marketing Summary
(Ranked by Estimated 2024 U.S. Net Marketing Spend)

Chain	Gross Store Level Marketing Contributions				Incremental Franchisor Contributions	Total Marketing Admin [1]	2024 Net Marketing Spend	
	National/ Brand Fee	Local/ Co-op	Support/ Admin.	Total Gross			% of Sales	Spend ($MM)
Applebee's								
Buffalo Wild Wings								
Chili's Grill & Bar								
Outback								
Olive Garden								
LongHorn								
Cheesecake Factory								
Texas Roadhouse								
BJ's Restaurants								
Red Robin								
Casual								
Popeyes								
KFC								
Wingstop								
Bojangles'								
Church's								
Chicken								
Starbucks								
Dunkin'								
Dutch Bros Coffee								
Krispy Kreme								
Tim Horton's								
Coffee/Bakery								
Cracker Barrel								
IHOP								
Denny's								
Golden Corral								
Perkins								
Family								
Chipotle								
Panera Bread								
Qdoba								
Moe's Southwest Grill								
Fast Casual								

Report Outline

Restaurant Research®

$1B+ Chain Marketing Summary
(Ranked by Estimated 2024 U.S. Net Marketing Spend)

Chain	Gross Store Level Marketing Contributions				Incremental Franchisor Contributions	Total Marketing Admin [1]	2024 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								
Chick-fil-A								
Dairy Queen								
Jack in the Box								
Arby's								
Culver's								
Hardee's								
Carl's Jr.								
Zaxby's								
Checkers/ Rally's								
Del Taco								
Five Guys								
Sandwich								
Domino's								
Papa John's								
Pizza Hut								
Little Caesars								
Pizza								
Subway								
Jersey Mike's								
Jimmy John's								
Firehouse Subs								
Total								

RR Estimate

Report Outline

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Net Marketing Spend $MM by Chain (2020 - 2024)

Ranked by $ Change in Estimated 2024 U.S. Net Marketing Spend

	Net Marketing Spend $ Millions					Net Marketing Spend % System Sales					Change '24/'23	
Chain	**2020**	**2021**	**2022**	**2023**	**2024**	**2020**	**2021**	**2022**	**2023**	**2024**	**$ Spend**	**% Spend**
Wendy's												
Taco Bell												
Chick-fil-A												
Culver's												
McDonald's												
Zaxby's												
Burger King												
Hardee's												
Five Guys												
Jack in the Box												
Checkers/ Rally's												
Dairy Queen												
Carl's Jr.												
Sonic Drive-In												
Arby's												
Sandwich												
Domino's												
Little Caesars												
Pizza Hut												
Papa John's												
Pizza												
Starbucks												
Dunkin'												
Krispy Kreme												
Tim Horton's												
Coffee/Bakery												
Wingstop												
Popeyes												
Bojangles'												
Church's												
KFC												
Chicken												

Report Outline

Restaurant Research®

Net Marketing Spend $MM by Chain (2020 - 2024)

Ranked by $ Change in Estimated 2024 U.S. Net Marketing Spend

	Net Marketing Spend $ Millions					Net Marketing Spend % System Sales					Change '24/'23	
Chain	**2020**	**2021**	**2022**	**2023**	**2024**	**2020**	**2021**	**2022**	**2023**	**2024**	**$ Spend**	**% Spend**
Jersey Mike's												
Jimmy John's												
Firehouse Subs												
Subway												
Sub-Sandwich												
Chili's Grill & Bar												
Outback												
Cheesecake Factory												
Buffalo Wild Wings												
BJ's Restaurants												
Texas Roadhouse												
LongHorn												
Olive Garden												
Applebee's												
Red Robin												
Casual												
Qdoba												
Moe's Southwest Grill												
Chipotle												
Panera Bread												
Fast Casual												
Cracker Barrel												
Denny's												
Perkins												
IHOP												
Golden Corral												
Family												
Total												

Report Outline

Social Media Stats

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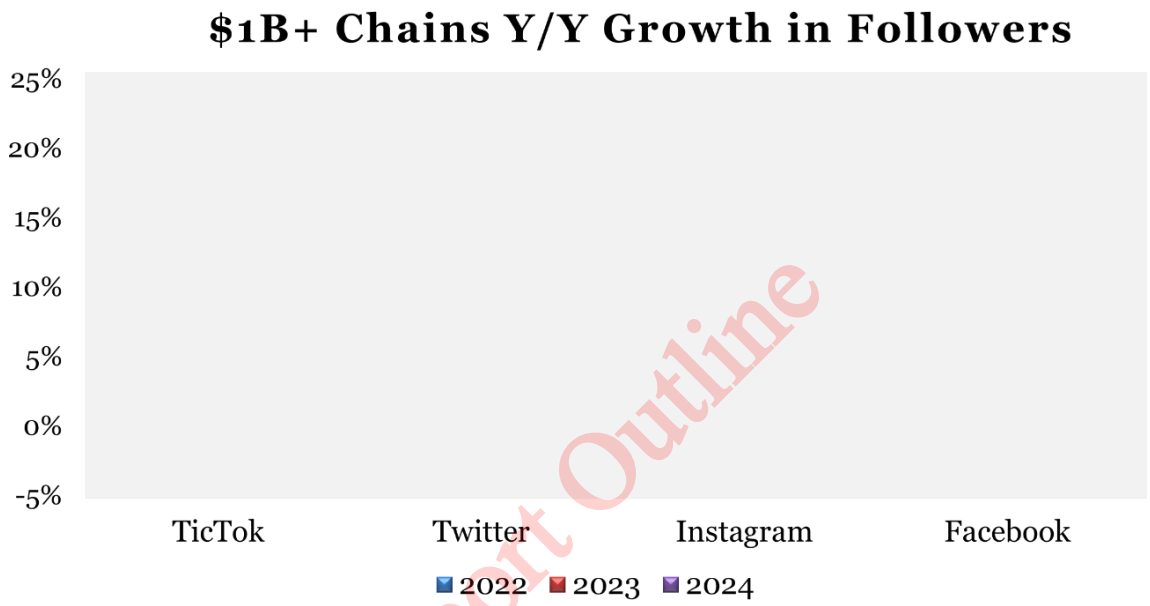

Report Outline

$1B+ Chains 2024 y/y Follower Growth

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

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$1B+ Chains Social Media Followers

Ranked by Change in Facebook Followers (Dec. '24/Dec. '23)

Chain	Social Media Followers (Dec. '24)			Social Media Followers Y/Y % Change (Dec. '24/Dec. '23)		
	Twitter	Instagram	Facebook	Twitter	Instagram	Facebook
Checkers/ Rally's						
Wendy's						
Carl's Jr.						
Five Guys						
Hardee's						
Dairy Queen						
McDonald's						
Culver's						
Whataburger						
Zaxby's						
Chick-fil-A						
Arby's						
Jack in the Box						
Sonic Drive-In						
Taco Bell						
Burger King						
Sandwich						
Domino's						
Little Caesars						
Papa John's						
Pizza Hut						
Pizza						
Popeyes						
Bojangles'						
KFC						
Church's						
Chicken						
Firehouse Subs						
Jersey Mike's						
Subway						
Jimmy John's						
Sub-Sandwich						
Tim Horton's						
Krispy Kreme						
Dunkin'						
Starbucks						
Coffee/Bakery						

Report Outline

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$1B+ Chains Social Media Followers

Ranked by Change in Facebook Followers (Dec. '24/Dec. '23)

Chain	Social Media Followers (Dec. '24)			Social Media Followers Y/Y % Change (Dec. '24/Dec. '23)		
	Twitter	Instagram	Facebook	Twitter	Instagram	Facebook
BJ's Restaurants						
Texas Roadhouse						
T.G.I. Friday's						
LongHorn						
Cheesecake Factory						
Buffalo Wild Wings						
Olive Garden						
Chili's Grill & Bar						
Outback						
Applebee's						
Red Robin						
Casual						
Chipotle						
Moe's Southwest Grill						
Panera Bread						
Qdoba						
Fast Casual						
Perkins						
Golden Corral						
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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