

BrandVue's Most Loved
EATING OUT BRANDS
2023

Who is winning the hearts of US diners?

CONTENTS

Introduction	03
The power of love	03
Which brands are the top performers?	04
Asian	05
Burger	05
Cafés & bakery	06
Chicken	06
Delivery	06
Family style	06
Frozen desserts	07
Italian or Pizza	07
Mexican	07
Sandwich	07
Seafood	08
Specialty	08
Steak	08
Varied menu	08
Observation and analysis	09
Our strong, stable relationship with Mexican food?	10
Changing times, changing tastes	11
Eating out but staying in; We love delivery apps	12
The complete ranking	14
No 01-100	15
How Savanta can help you	18
Our core areas of service delivery	19
Our BrandVue data engine	20
The team behind the report	21

The power of *Love*

Welcome to BrandVue's Most Loved Eating Out Brands 2023 – a recognition and celebration of the most emotively connected Eating Out brands in 2023, brought to you by Savanta.

Within this report, we reveal America's most loved Eating Out brands – with performance rankings from across all major categories – Asian, burger, Café or Bakery, chicken, delivery, family style, frozen dessert, Italian or Pizza, Mexican, sandwich, seafood, specialty, steak, and varied menu.

The consumer insight is drawn from the opinions of over 72,000 consumers through Savanta's market intelligence platform, BrandVue Eating Out: the largest and most comprehensive brand, audience, and customer tracking engine in the market.

Over the following pages, we explore Americans' enduring love affair with Mexican cuisine, investigating its widespread popularity and the Mexican cultural influence ingrained in the American culinary fabric. We also examine the evolution of American palates, highlighting the growing sophistication and adventurousness of food consumers nationwide. Lastly, we focus on the significant trend towards take-out eating. We analyze the reasons behind this shift, its implications for the food industry, and the innovative ways businesses are adapting to meet this increasing demand.

We hope you enjoy this report and the insights found within and look forward to bringing you more best-in-class insights to help you make better decisions.

Sincerely,



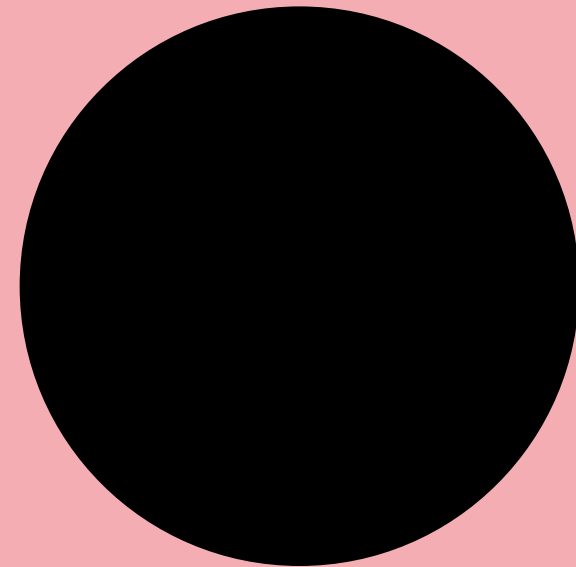
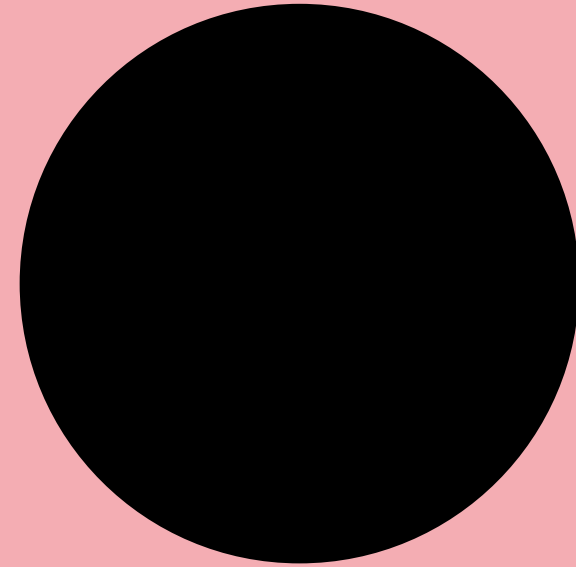
Vin DeRobertis

CEO – Savanta Americas
New York – Toronto – San Francisco – Philadelphia



Which brands are the
TOP PERFORMERS?

Asian	05
Burger	05
Cafés & bakery	06
Chicken	06
Delivery	06
Family style	06
Frozen desserts	07
Italian or Pizza	07
Mexican	07
Sandwich	07
Seafood	08
Specialty	08
Steak	08
Varied menu	08



Top 3

Category medalists



CATEGORY MEDALISTS

Asian

- 1 Panda Express 
- 2 Noodles & Company 
- 3 P.F. Chang's 



CATEGORY MEDALISTS

Burger

- 1 McDonald's 
- 2 In-N-Out Burger 
- 3 Wendy's 




CATEGORY MEDALISTS

Café or Bakery

- 1 Starbucks 
- 2 Dunkin' Donuts 
- 3 Dutch Bros Coffee 




CATEGORY MEDALISTS

Chicken

- 1 Chick-fil-A 
- 2 Raising Cane's 
- 3 KFC 

CATEGORY MEDALISTS

Delivery

- 1 Caviar 
- 2 DoorDash 
- 3 UberEats 




CATEGORY MEDALISTS

Family style

- 1 Cracker Barrel Old Country Store 
- 2 IHOP 
- 3 Golden Corral 

CATEGORY MEDALISTS

Frozen dessert

- 1 Cold Stone Creamery 
- 2 Rita's 
- 3 Baskin Robbins 

CATEGORY MEDALISTS

Italian or Pizza

- 1 Olive Garden 
- 2 Pizza Hut Restaurant 
- 3 Pizza Ranch 

CATEGORY MEDALISTS

Mexican

- 1 Taco Bell 
- 2 Chipotle 
- 3 Uncle Julio's 

CATEGORY MEDALISTS

Sandwich

- 1 Subway 
- 2 Jason's Deli 
- 3 McAllister's Deli 




CATEGORY MEDALISTS

Seafood

- 1 Red Lobster 
- 2 Captain D's Seafood Kitchen 
- 3 Bonefish Grill 


CATEGORY MEDALISTS

Specialty

- 1 Krispy Kreme 
- 2 Auntie Anne's 
- 3 Cinnabon 

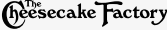


CATEGORY MEDALISTS

Steak

- 1 Texas Roadhouse 
- 2 Outback Steakhouse 
- 3 LongHorn Steakhouse 

CATEGORY MEDALISTS

Varied Menu

- 1 The Cheesecake Factory 
- 2 Joe & The Juice 
- 3 Applebee's 

Observation & **ANALYSIS**

Our strong, stable relationship with Mexican food?	11
Changing times, changing tastes	12
Eating out but staying in; We love delivery apps	13

Our strong, stable relationship with

Mexican Food



Mexican cuisine has long found a home in the U.S., transforming from a niche ethnic offering to a mainstream staple over decades. Its notable ascent in consumer rankings further underscores its enduring appeal and adaptability to evolving American palates. Beyond mere numbers, this trend reflects not just the changing cultural dynamics but also the historical and socio-economic ties between the U.S. and Mexico. These insights emphasize the need for brands to recognize both the legacy and the future of global cuisines.



Andrew Trudeau,
Director, Client Development

In a fluctuating Top 10, led by Chick-fil-A and Starbucks, only one other brand has held onto its position since 2022 – Taco Bell.

The Tex-Mex brand broke into the Top 10 last year and has now secured its status there at No.8 after an impressive 2023 so far.

First, they won the battle for Taco Tuesday to be free of trademark restrictions in 49 states. Then they celebrated generously by opening a \$5m DoorDash taco tab for Tuesday, September 12th, covering

taco-lovers' orders from any Mexican outlet, not just Taco Bell's!

A distinctive social media strategy wins through a bold take on subliminal instant messaging (e.g., "the best nights end with taco bell"), and for the last two Super Bowls, marketers have done a great job capitalizing on the hype for their Mexican Pizzas.

Let the celebrations begin!

September 15th to October 15th is National Hispanic Heritage Month, a great time to celebrate the rich cultural contributions – including the cuisine.

Plus, with the popularity of Margarita Mondays, Fajita Fridays, and, of course Taco Tuesdays, Mexican food is

well-placed to be America's next favorite international cuisine after Italian. Taco Bell sits not far behind Olive Garden (#6).

One thing's for sure... as Taco Bell likes to say, it's time to Live Más and embrace our love of the Mexican eating-out experience!

Mouth-watering Mexican meals

Out of the eight Mexican cuisine brands in our Top 100 table, almost all of them have gained places year-on-year.

In ranking order, the list includes #45 Uncle Julio's (+19), #56 Taco John's (+19), #70 Rubio's (+26), #90 El Pollo Loco (+18), #95 Del Taco (+8) and #96 Qdoba (+5).

The only exception is Chipotle, ranking #30 since last year's #26 position, but still the second most loved Mexican food brand.

Chipotle is looking for new admirers, announcing in January ambitious plans to double their footprint by expanding to 7,000 new locations.

Changing times,

Changing tastes



The American palate has evolved from a predominantly meat-and-potatoes diet to embracing a diverse spectrum of global cuisines as well as culinary innovations that embrace ethical and environmental considerations. This shift is a testament to America's melting pot identity, constantly reshaped by waves of immigration, travel, technological advancements, and climate change. Our data reveals that while classic American burger joints have seen a dip, various global flavors are on the rise. While traditional cuisines remain comfort foods in many households, we see long-term changes in day-to-day dining preferences. From Meatless Mondays to a completely plant-based diet, we see a rising prioritization of health, ethics, and the environment over tradition and culture when choosing our next meal.



Nicole Beremovica,
Research Analyst, Research, Insights and Consulting

Lots of brands are feeling the love in 2023. Including new entrants, 52 brands in the Top 100 have gained places since last year.

Astonishingly, a quarter of our Top 100 brands have achieved a YoY double-digit ranking climb. In contrast, our 2022 league table saw 46 climbers, including

new entrants, with only four seeing double-digit rises. Not only that, but this year, 11 brands have risen 20+ places. No brand rose so high in 2022.

Higher love

America has a craving for Caviar (#22). Rising a remarkable 52 places since 2022, the upmarket takeaway service is this year's biggest YoY winner. Other delivery apps impressing include Seamless (#53) and Postmates (#94), up 32 and 35 places, respectively, since last year.

Aside from delivery services, the biggest gain comes from seafood specialist Bonefish Grill, rising 39 places at #89, followed by #91 Einstein Bros Bagels

(+36). Other brands have jumped up over 30 places, too – #76 Bojangles (+31) and #97 Tim Hortons (+34).

Canadian favorite Tim Hortons is enjoying extra brand love alongside its recent US moves. In a sector where convenience is king, Timmies has put app-integrated drive-thru restaurants at the heart of its recent strategy. And the QSR chain's Cold Brew going on sale in Walmart last month can only boost its brand recognition.

Variety is the spice of love

Climbing over 20 ranks, we have #15 Pizza Ranch (+29), #18 Wingstop (+27), #66 Wetzel's Pretzels (+22), and #70 Rubio's (+26) – something to suit all tastes.

While these wide-ranging flavors are on the rise, some classic American burger brands are falling. Among those slipping at least ten places are Burger King, Dairy Queen, Five Guys, Whataburger and Shake Shack.

Is this a coincidence or part of a nascent trend? Well, it's been widely reported that the younger generations –

Millennials and Gen Z – have more varied tastes than their predecessors.

Faced with more choices, they're enjoying the chance to experiment. The rise of Instagram is also a probable contributing factor as younger consumers seek something different that stands out as a 'gram-able' snap.

But one thing's for sure – there's plenty of brand love to go around in our Top 100 league table. Tastes change over time, and lots of brands are enjoying a surge in consumer affection.

Eating out but staying in;

We love delivery apps

Delivery apps are in demand. Every delivery brand in our Top 100 has improved its ranking since last year.

In our busy lives, sometimes we want to eat out – but we wish our favorite restaurant could visit us, not vice versa. Delivery services have made that dream come true.

Market leaders DoorDash and Uber Eats are winning hearts and minds, not just through their own brands, but via their subsidiaries too.

Dinner to your door

Impressively, for brands that are only ten years old or younger, these apps are already household names. Nine in ten US consumers are aware of DoorDash (92%) and Uber Eats (88%), thanks to some high-profile advertising.

DoorDash (#27) has climbed 11 places since last year. Its recent Super Bowl ad, We Get Groceries, has helped spearhead an expansion beyond takeaways into regular

shopping – this move opens up potentially vast opportunities for delivery apps.

Uber Eats, at #42 and climbing 14 ranks, also used a Super Bowl ad spot to promote a different direction – Uber One.

The monthly membership leverages the strength of the Uber brand, combining savings on food orders and taxi rides. Could this be the differentiator to help Uber catch up with DoorDash?



Rivals on the roads

More and more delivery drivers are hitting the streets, as we just can't get our fill of dinner on demand. Several other delivery brands have high rankings, with some making big gains since 2022.

DoorDash acquisition Caviar – covering upscale urban restaurants – is enjoying a resounding 52 ranking rise to reach #22. And the Uber Eats subsidiary Postmates joins the Top 100 this year, climbing 35 places since 2022.

So, in terms of brand love, DoorDash and Uber Eats are already receiving the

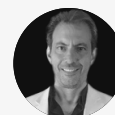
rewards from their recent consolidations in 2019 and 2020, respectively. Also rising through the ranks this year is #53 Seamless, soaring 32 spots.

But by moving into groceries, delivery services are coming into competition with supermarkets, plus the Meal-kit category headed by Plated (#68).

Will grocery deliveries drive growth for DoorDash, or has the brand bitten off more than it can chew? So far, it's the former but watch this space. In this disruptive sector, DoorDash isn't the only competitor that makes its moves quickly!

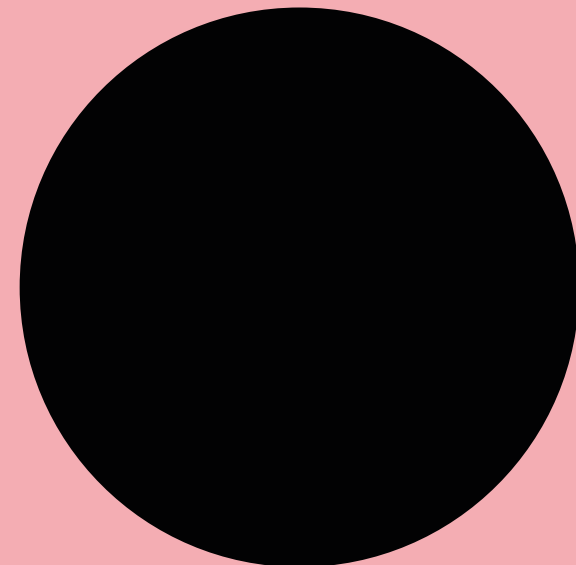
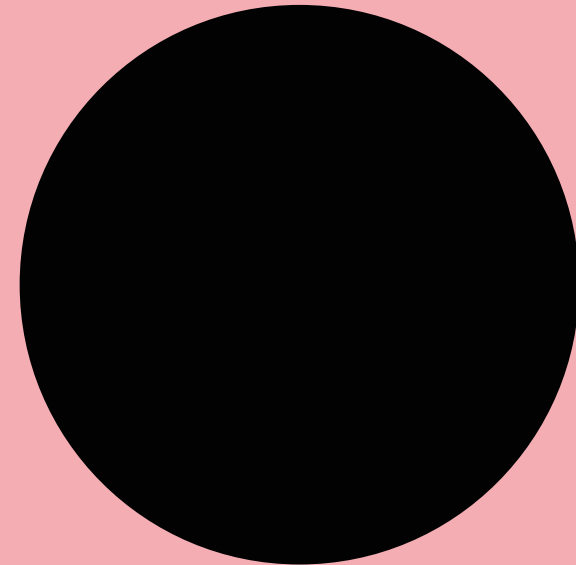


The U.S. has witnessed a profound metamorphosis in its food delivery landscape. What was once a niche convenience has catapulted into a ubiquitous service, echoing America's fast-paced, technology-driven lifestyle. Brands like DoorDash and Uber Eats, though relatively young, have deeply integrated into the daily rhythms of Americans, a fact reinforced by their swift ascent in consumer rankings. Their strategic consolidations and forays beyond traditional meal delivery, venturing into realms like groceries, reflect a vision of serving a holistic consumer need. Historical context reveals that Americans have long favored convenience, from TV dinners in the 1950s to today's on-demand food apps. As delivery apps encroach on territories traditionally held by supermarkets and meal-kit services, the dynamic and fiercely competitive nature of this industry demands careful observation.













Chuck Woelfel,
SVP, Research, Insights and Consulting

The complete
RANKING



No. 01-100


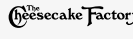














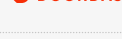



Ranking	Brand	Category	Change vs 2022 (ranking)
1	Chick-fil-A 	Chicken	—
2	Starbucks 	Café or Bakery	—
3	McDonald's 	Burger	↑
4	Texas Roadhouse 	Steak	↓
5	Krispy Kreme 	Specialty	↓
6	Olive Garden 	Italian or Pizza	—
7	Raising Cane's 	Chicken	↑
8	Taco Bell 	Mexican	—
9	Dunkin' Donuts 	Café or Bakery	↓
10	In-N-Out Burger 	Burger	↑





















Our Methodology:





















We capture people's love for Eating Out brands through BrandVue Eating Out, our continuous brand tracking study. Brand Love is calculated as the percentage of people stating that they 'love' a brand, based on the question: 'What is your opinion of the following brand', with option 1 being love and option 7 being hate.




















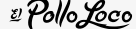
The league table of our Top 100 Eating Out Brands is created by ranking the organizations by their Brand Love score, having met suitable brand awareness criteria.










Fieldwork dates: 1ST September 2022 - 31ST August 2023

Ranking	Brand	Category	Change vs 2022 (ranking)
11	Subway 	Sandwich	—
12	The Cheesecake Factory 	Varied Menu	↓
13	KFC 	Chicken	↑
14	Pizza Hut Restaurants 	Italian or Pizza	↓
15	Pizza Ranch 	Italian or Pizza	↑
16	Wendy's 	Burger	↓
17	Popeyes 	Chicken	↑
18	Wingstop 	Chicken	↑
19	Auntie Anne's 	Specialty	↓
20	Braum's 	Burger	↑
21	Cinnabon 	Specialty	↓
22	Caviar 	Delivery	↑
23	Culver's 	Burger	↑
24	Cold Stone Creamery 	Frozen Dessert	↓
25	Red Lobster 	Seafood	↓
26	Domino's 	Italian or Pizza	↓
27	DoorDash 	Delivery	↑
28	Great American Cookies 	Specialty	↑
29	Dutch Bros Coffee 	Café or Bakery	↑
30	Chipotle 	Mexican	↓

Ranking	Brand	Category	Change vs 2022 (ranking)
31	Jet's Pizza 	Italian or Pizza	↑
32	Outback Steakhouse 	Steak	↓
33	Rita's 	Frozen Dessert	↑
34	Baskin Robbins 	Frozen Dessert	↓
35	LongHorn Steakhouse 	Steak	↓
36	Penn Station East Coast Subs 	Specialty	—
37	Tropical Smoothie Cafe 	Specialty	↓
38	Zaxby's 	Chicken	↓
39	Yogurtland 	Frozen Dessert	↑
40	Cracker Barrel Old Country Store 	Family Style	↓
41	Menchie's 	Frozen Dessert	↑
42	UberEats 	Delivery	↑
43	Mellow Mushroom 	Italian or Pizza	↑
44	Burger King 	Burger	↓
45	Uncle Julio's Mexican from Scratch 	Mexican	↑
46	Sonic Drive-In 	Burger	↓
47	Whataburger 	Burger	↓
48	Smoothie King 	Specialty	↑
49	Panera Bread 	Café or Bakery	↓
50	Panda Express 	Asian	↓

Ranking	Brand	Category	Change vs 2022 (ranking)
51	Joe & The Juice 	Varied Menu	NEW
52	Five Guys 	Burger	↓
53	Seamless 	Delivery	↑
54	Applebee's 	Varied Menu	↓
55	Freddy's 	Burger	↑
56	Taco John's 	Mexican	↑
57	Charleys Philly Steaks 	Varied Menu	NEW
58	Buffalo Wild Wings 	Sports Bar	↓
59	Arby's 	Varied Menu	NEW
60	IHOP 	Family Style	↓
61	The Coffee Bean & Tea Leaf 	Café or Bakery	↑
62	Anthony's Coal Fired Pizza & Wings 	Italian or Pizza	↑
63	MOD Pizza 	Italian or Pizza	↓
64	Golden Corral 	Family Style	↓
65	Dairy Queen 	Burger	↓
66	Wetzel's Pretzels 	Specialty	↑
67	Marco's Pizza 	Italian or Pizza	↑
68	Plated 	Meal-kit	NEW
69	Rally's 	Burger	↑
70	Rubio's 	Mexican	↑

Ranking	Brand	Category	Change vs 2022 (ranking)
71	Papa John's 	Italian or Pizza	↓
72	Chili's 	Varied Menu	↓
73	Jason's Deli 	Sandwich	NEW
74	Noodles & Company 	Asian	↑
75	Jamba Juice 	Specialty	↑
76	Bojangles 	Chicken	↑
77	Little Caesars 	Italian or Pizza	↓
78	Shake Shack 	Burger	↓
79	Steak 'n Shake 	Burger	↓
80	McAlister's Deli 	Sandwich	NEW
81	Waffle House 	Family Style	↓
82	Jersey Mike's Subs 	Sandwich	↑
83	Logan's Roadhouse 	Steak	↓
84	Krystal 	Burger	↑
85	O'Charley's 	Varied Menu	↓
86	Checkers 	Burger	↑
87	Firehouse Subs 	Sandwich	NEW
88	Captain D's Seafood Kitchen 	Seafood	↓
89	Bonefish Grill 	Seafood	↑
90	El Pollo Loco 	Mexican	↑

Ranking	Brand	Category	Change vs 2022 (ranking)
91	Einstein Bros Bagels 	Café or Bakery	↑
92	Church's Texas Chicken 	Chicken	↑
93	Dickey's Barbecue Pit 	Specialty	↓
94	Postmates Postmates	Delivery	↑
95	Del Taco 	Mexican	↑
96	Qdoba 	Mexican	↑
97	Tim Hortons 	Café or Bakery	↑
98	Papa Murphy's 	Italian or Pizza	↓
99	Fazoli's 	Italian or Pizza	↑
100	White Castle 	Burger	↓



How Savanta
CAN HELP YOU

Our core areas of service delivery **19**

Our BrandVue data engine **20**

The team behind the report **21**

Our core areas of *Service delivery*

Coverage and capabilities

Market Intelligence

Understand your sector, beyond a brand level

- Who's in growth?
- Who's in decline?
- Identify trends
- Spot opportunities & threats

Brand Performance

Plot where you (and competitors) sit within the market

- Brand scale
- Brand prestige
- Brand perceptions
- Brand health

Audience Understanding

What makes your customers unique?

- Top line demographics (age, gender, region, SEG)
- Media consumption
- Content types
- Social media usage
- Sports followed & hobbies

Marketing Performance

Track saliency measures in-line with your activity

- Are you being heard/seen through the noise?
- Is it being received positively or negatively?
- How are your brand perceptions shifting with increases/decreases in ad spend?

Customer Acquisition

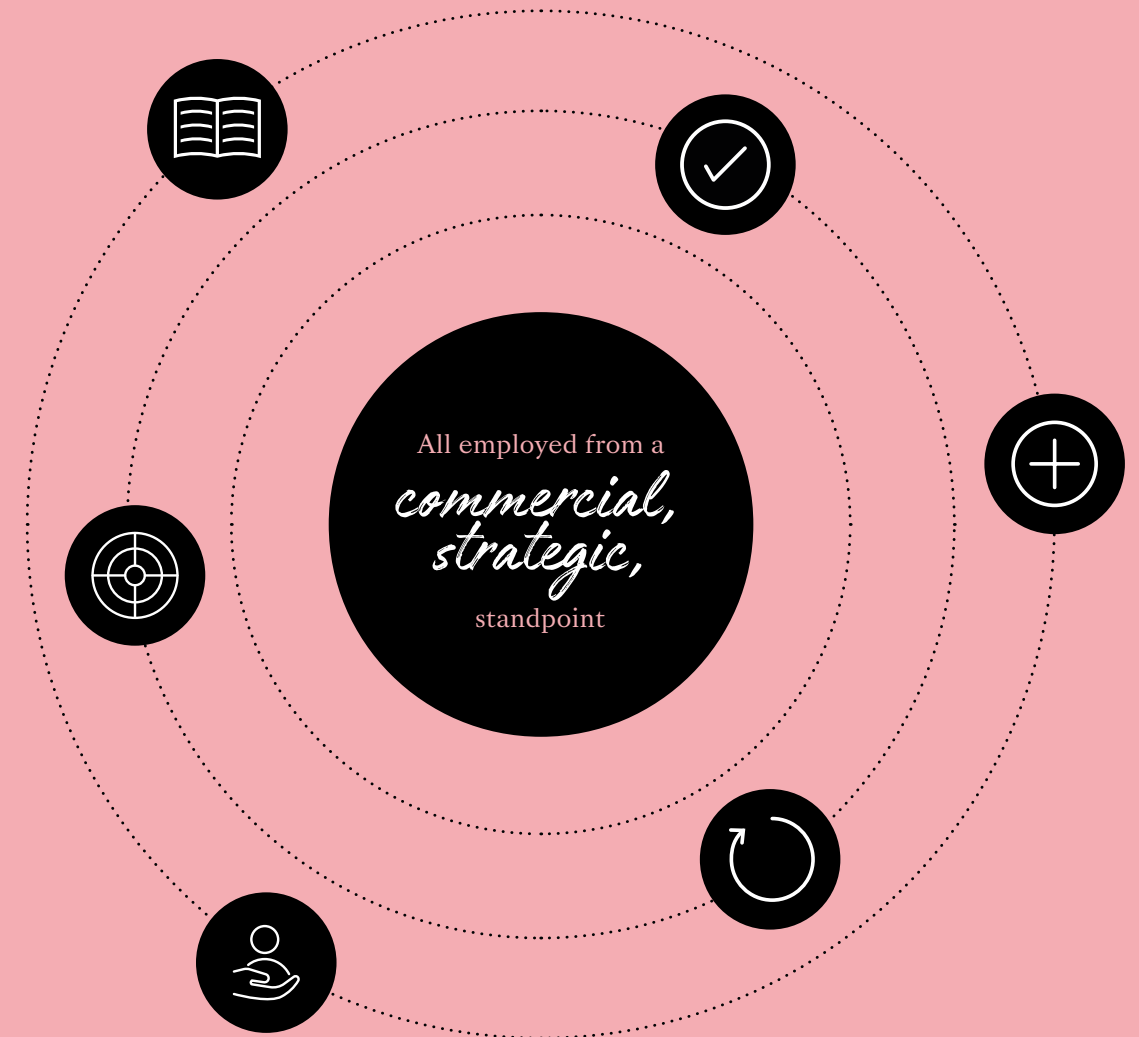
Where are your opportunities to drive efficiency through the customer journey?

- Adoption Funnel analysis
- Brand mapping
- Spontaneous awareness positioning

Customer Retention

How often are your customers returning to you, and how can you get them to do so more often?

- Customer Experience analysis
- Customer satisfaction (online and in-store)
- Net-Promoter Score
- Lapsed customer analysis



Our BrandVue *data engine*

Leveraging the full power
of BrandVue for eating out brands



We ask 72,000
consumers annually



158 eating out
brands surveyed



50+ brand
metrics



15+ category
metrics



Intuitive and
always-on dashboard



The team

behind the report



Marni Hirschorn
EVP, Research, Insights
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EATING OUT

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