

# Brandwatch Report/ Social Listening in the Restaurant, Food & Beverage Industry/ 2015



Brandwatch



# Brandwatch Report

## Restaurant, Food & Beverage/ 2015

### A Rising Imperative

Restaurant, food & beverage businesses, operating at the mercy of consumers' shifting tastes and preferences, face a rising imperative to proactively listen, understand, and respond to their consumers' opinions and interests.

Social media, both instant and highly public, provides brands with the significant opportunity to maintain an awareness of their audience and the greater consumer landscape. The following report examines the online activity of leading restaurant, food & beverage brands, evaluating the performance of industry leaders and identifying key strategies to leverage the power of social media.

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Thank you

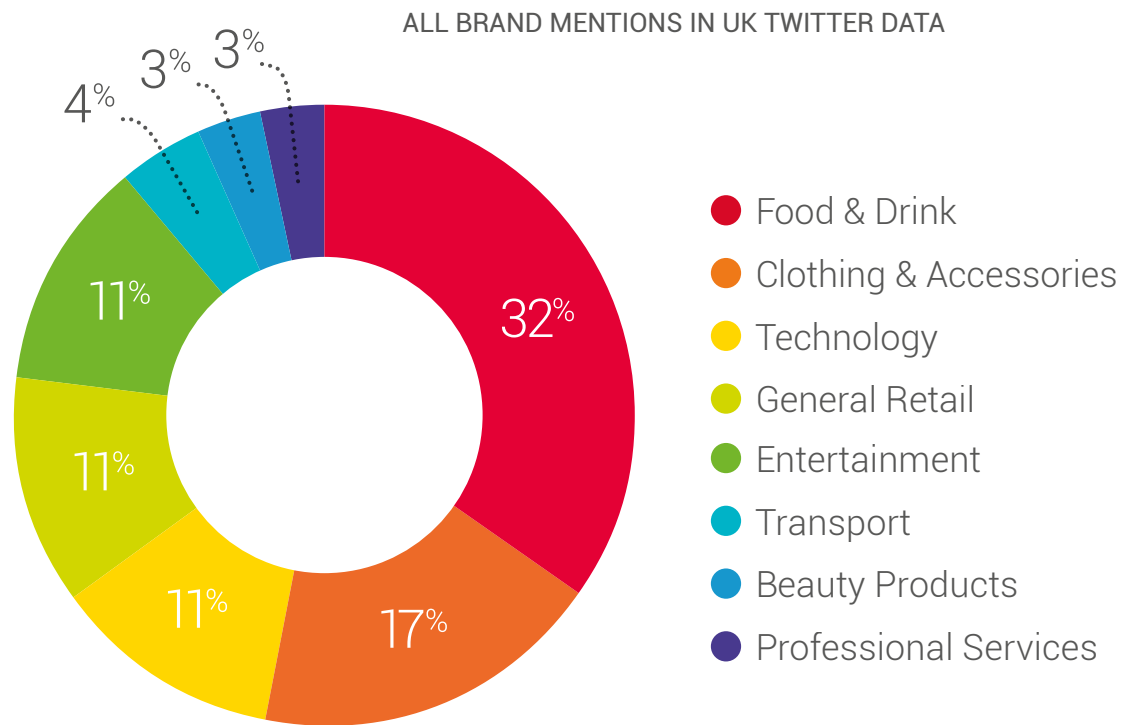
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# Restaurant, Food & Beverage

## A Primer on Restaurant, Food & Beverage

**Vulnerable to the tumultuous flux in agricultural supply and consumer demand, the industry is characterized by seemingly unpredictable change.**



For businesses operating in such a competitive and turbulent environment, having a keen awareness of consumers' shifting tastes is paramount to maintaining the social favor that greatly influences a company's success. Both widespread and rapid, social media offers an immediate wealth of insight into the conversations and opinions that define the consumer pulse.

With an estimated 32% of UK brand mentions centered around the food & drink industry, the opportunities for these businesses to leverage social media data are especially apparent. Beneath these online discussions lies opportunities for customer service teams, community managers, marketers, product development and more.

# Restaurant, Food & Beverage

## Scope of the Report

**The following report outlines the online activity, social media applications, and performance of leading restaurant, food & beverage businesses.**

The aim is to both provide meaningful insights and benchmarks for businesses and to provoke some thought on how social media can be leveraged to promote a variety of endeavors.

**The report is divided into four sections:**

- **Industry Benchmarks** examines the average Twitter and Facebook activity of 50 industry-leading brands and their audiences, providing broad tips to improve content performance.
- **Sector Insights** provides the share of voice and key insights for leading brands across quick serve restaurants, chain restaurants, beverage brands, cereal brands and food manufacturers.
- **Social Media Intelligence Applications** explores a few of the unique ways in which businesses can leverage social media to inform, optimize and facilitate their organization's operations.
- **The Restaurant, Food & Beverage Social Index** ranks the performance of 50 industry leaders across four key aspects

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# Restaurant, Food & Beverage

## Facebook Channel Benchmarks

**Restaurant, food & beverage brands' Facebook channels benefit from an audience that is passionate about what they consume.**

AN AVERAGE DAY FOR LEADING RESTAURANT,  
FOOD & BEVERAGE BRANDS' FACEBOOK CONTENT



These businesses are drawing considerable media attention and driving effective social campaigns through an average of only 1.55 Facebook posts per day.

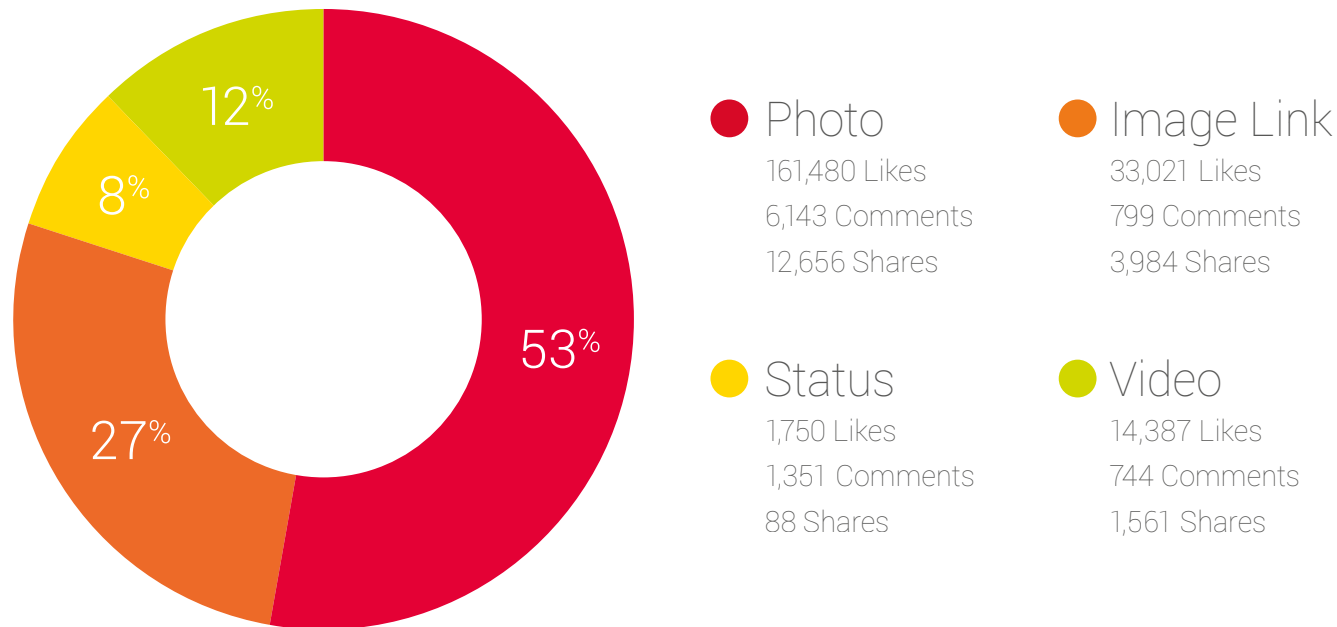
However, the level of audience engagement somewhat pales in the context of a mean follower base of over 11 million. Certainly there is room for these brands to better leverage their massive follower base and increase the volume of daily interactions with their target audience.

Yet in order for brands to optimize their content strategies, they will first need effective ways of managing, tracking and evaluating how well their online activities resonate with their consumers.

# Restaurant, Food & Beverage Facebook Channel Benchmarks/ Content Type

An analysis of the Facebook content formats that restaurant, food & beverage brands use reveals that certain types of posts consistently perform better than others.

LEVEL OF ENGAGEMENT BY POST TYPE FOR 50 LEADING RESTAURANT, FOOD & BEVERAGE FACEBOOK CHANNELS



While images that link to other websites or content are the highest performing posts for most industries, simple photos perform substantially higher than any other format for restaurant, food & beverage brands.

Indeed, the top 10 performing posts are comprised of 4 posts announcing new products, 3 posts advertising existing products, 1 post advertising a discount, and 1 brand campaign. Aside from a Subway post depicting their iconic Jared alongside an Avengers mural, all of them center around a large photo of a food or beverage product.

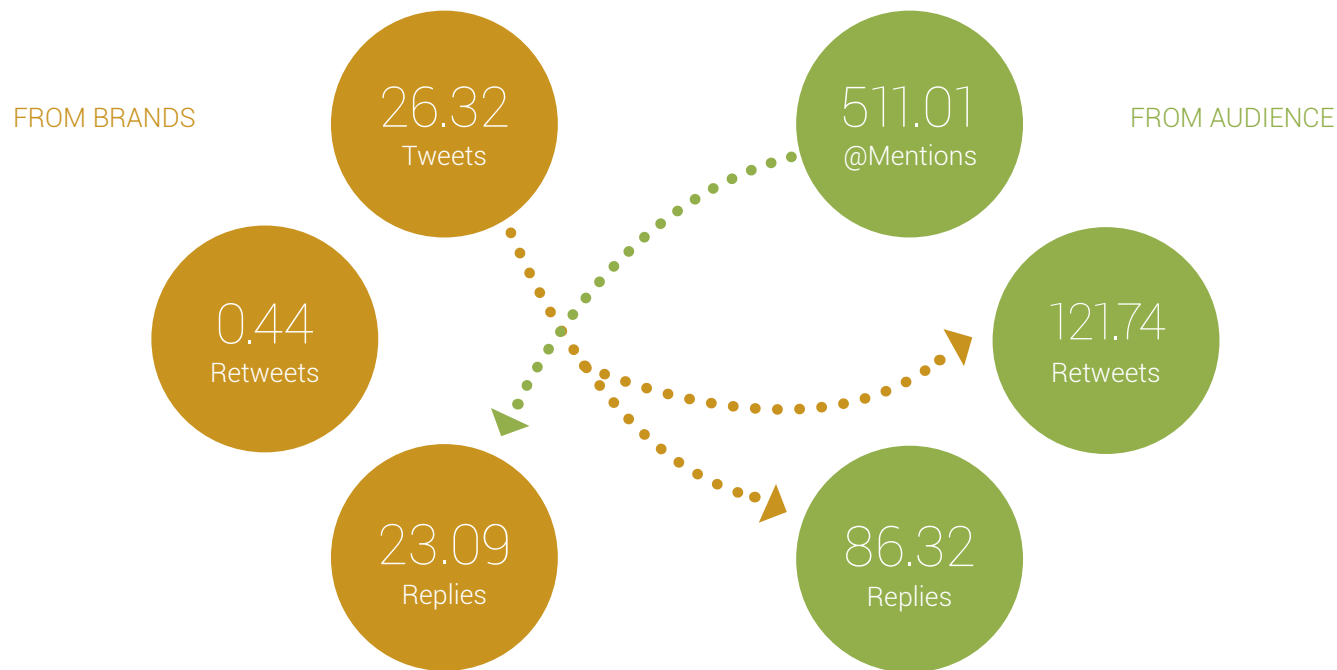
While maintaining a diverse stream of social content can be valuable, brands should center their strategies around photos. By continuously tracking their social performance, brands can identify the balance of formats that is the most successful for them.

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# Restaurant, Food & Beverage Twitter Channel Benchmarks

While the Twitter presence of restaurant, food & beverage brands varies dramatically, the industry as a whole is exceptionally effective at communicating with their audience.

AN AVERAGE DAY FOR LEADING RESTAURANT,  
FOOD & BEVERAGE TWITTER ACCOUNTS



An overview of these brands' Twitter channels exposes the ways that these major businesses communicate with their followers.

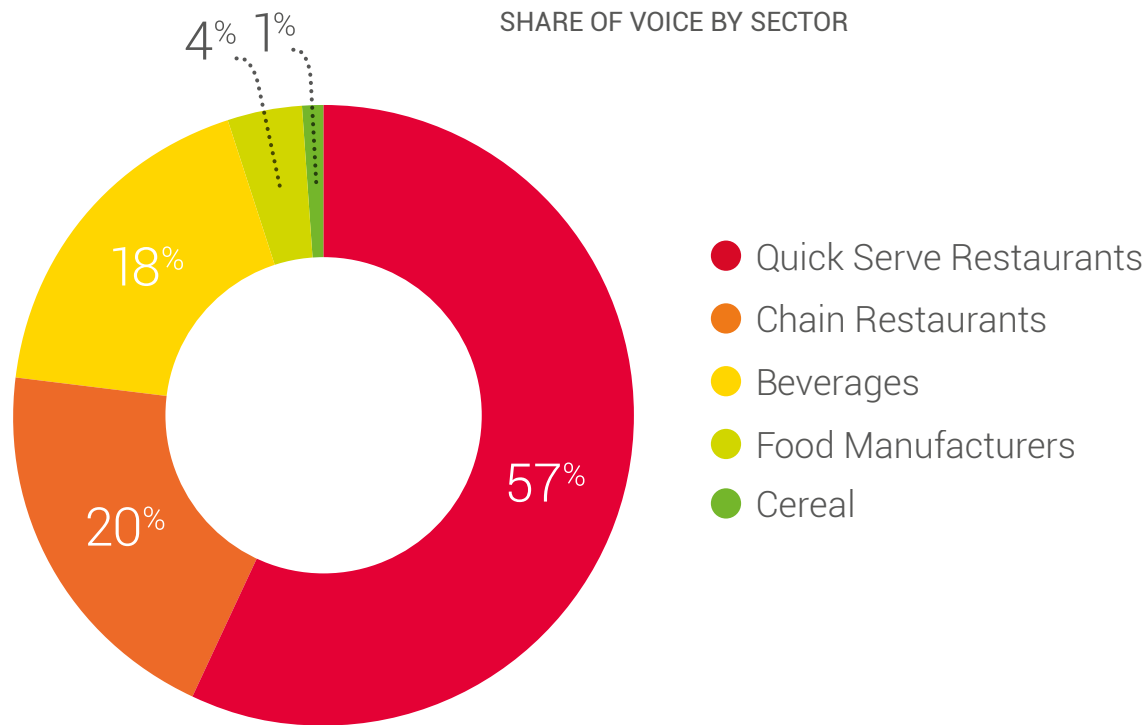
Receiving a mean of over 500 @mentions and publishing an average of 23.09 replies per day, these leading brands are definitely maintaining a consistent dialogue with their audience. Still, the data includes a diverse range of social media prowess, with leading brands earning around 2,000 @mentions per day and smaller brands garnering just over 50 @mentions per day.

Hashtags such as Coca-Cola's **#shareacoke** and **#makehappinessZA** as well as Applebee's **#shareables** and **#livelunch** were among the most successful and stand testament to the influential capability of coordinated social campaigns.

# Restaurant, Food & Beverage

## Sectors Insights

The following section examines the share of voice for various sectors within the restaurant, food & beverage industry.



In this analysis, over 1 million mentions of 50 leading restaurant, food and beverage brands are collected.

Quick serve restaurants, which include multinational corporations like McDonalds, Burger King and Subway, maintain a strong majority of the conversation. Chain restaurants, such as Nando's or Applebee's, are the second most discussed sector, closely followed by beverage brands.

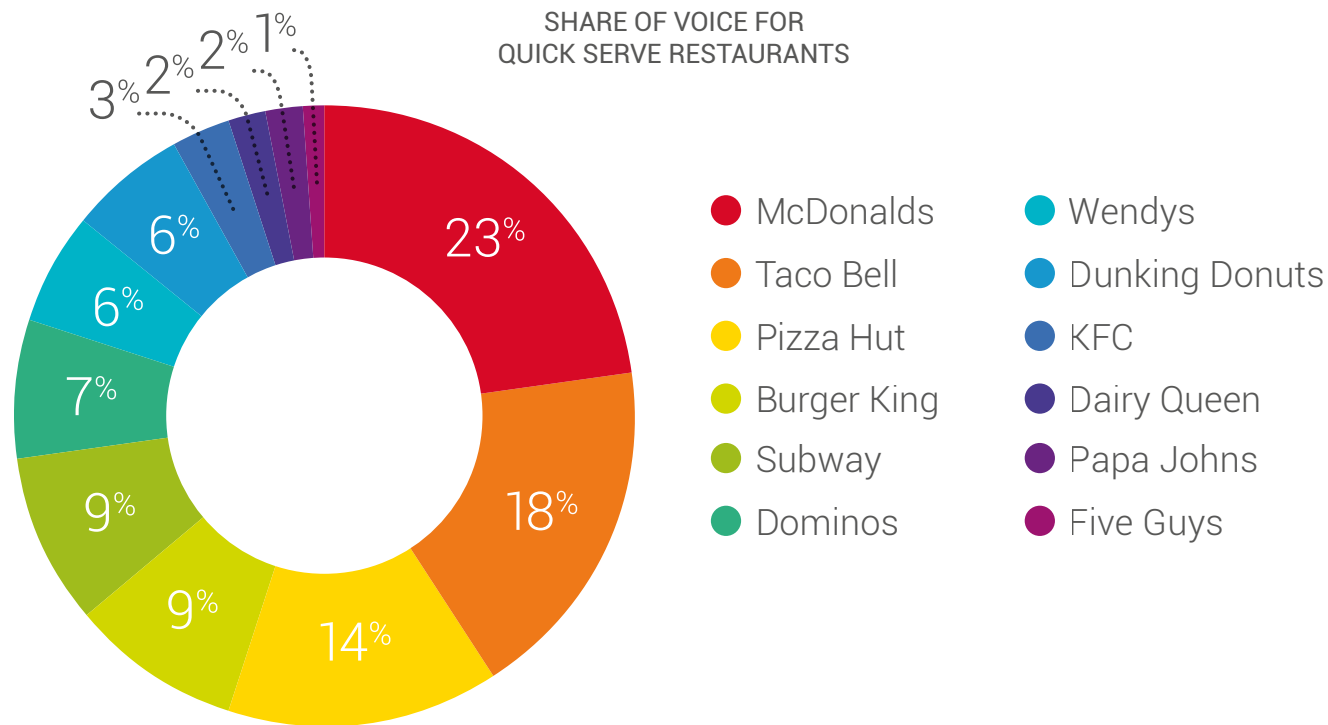
For each sector examined, brief insights are provided alongside the share of voice that shed light on some of the key factors affecting the distribution of conversation.



# Restaurant, Food & Beverage

## Sector Analysis/ Quick Serve Restaurants

For quick serve restaurants, the share of voice on Twitter is fairly evenly distributed across brands.



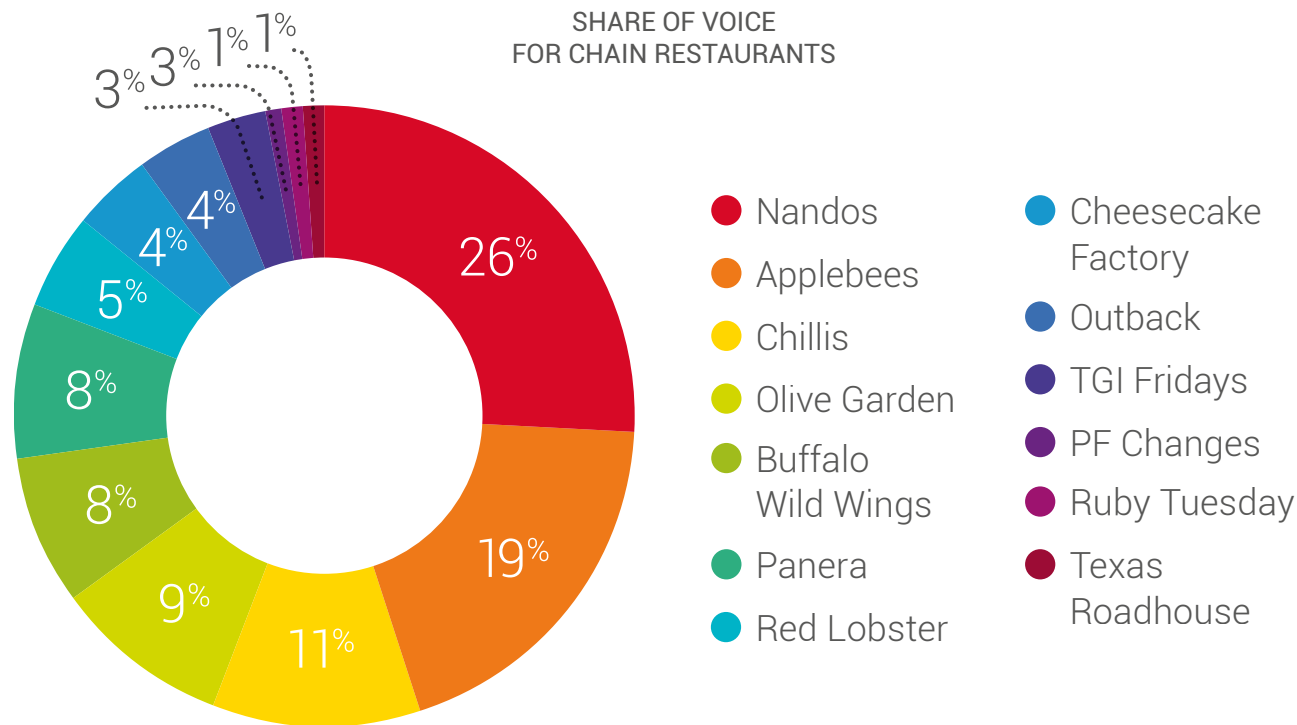
These conversations are driven by both an organic interest in brands as well as a variety of deliberate social media strategies. McDonald's, Taco Bell, Domino's and Papa John's all had a sweepstakes offer among their top three most tweeted hashtags. For Wendy's and Pizza Hut, associating their brand with major sporting events helped extend their reach.

However, a large share of voice does not always translate to a strong social presence. For Burger King, **#deforestation**, **#climate**, and **#palmoil**, all of which deride the brand's use of palm oil, were among the top 10 most frequently used hashtags. While all large brands endure a range of support and complaints, finding ways to effectively listen, understand and respond to these conversations is paramount.

# Restaurant, Food & Beverage

## Sector Analysis/ Chain Restaurants

**The conversation around chain restaurants is dominated by three clear leaders: Nando's, Applebee's and Chili's.**



Unsurprisingly, these also happen to be the brands that maintain the most active Twitter accounts.

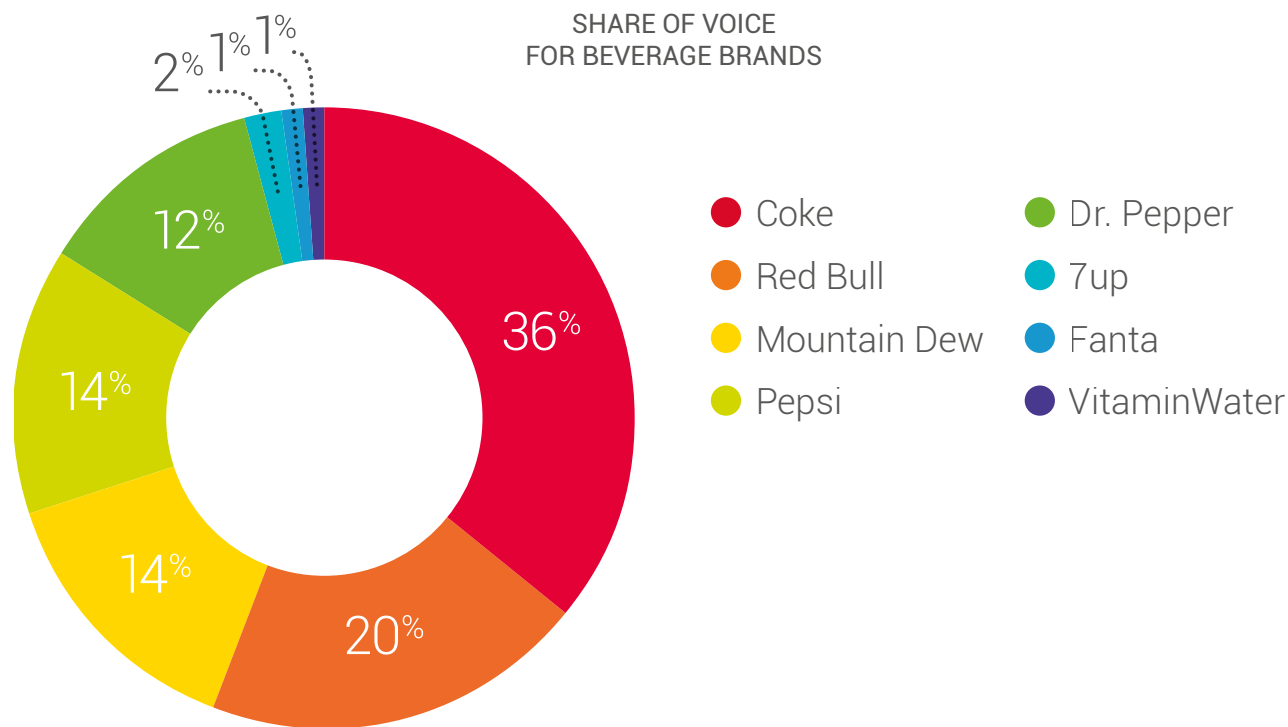
However, account activity cannot entirely explain a brand's success. While Chili's comprises 31% of chain restaurants' owned content, Nando's generates more conversation with only 21% of owned chatter. Nando's produces more buzz with less content than their counterparts.

Nando's success also comes from their large follower base as well as their tactical and creative social strategy. They've chosen celebrity endorsements that fit their Twitter audience, created engaging hashtag campaigns around their new products, and generated clever tweets about their existing items.

# Restaurant, Food & Beverage

## Sector Analysis/ Beverages

**Coca-Cola maintains the strongest social presence among major beverage brands with a share of voice over 16 percentage points higher than the runner-up, Red Bull.**

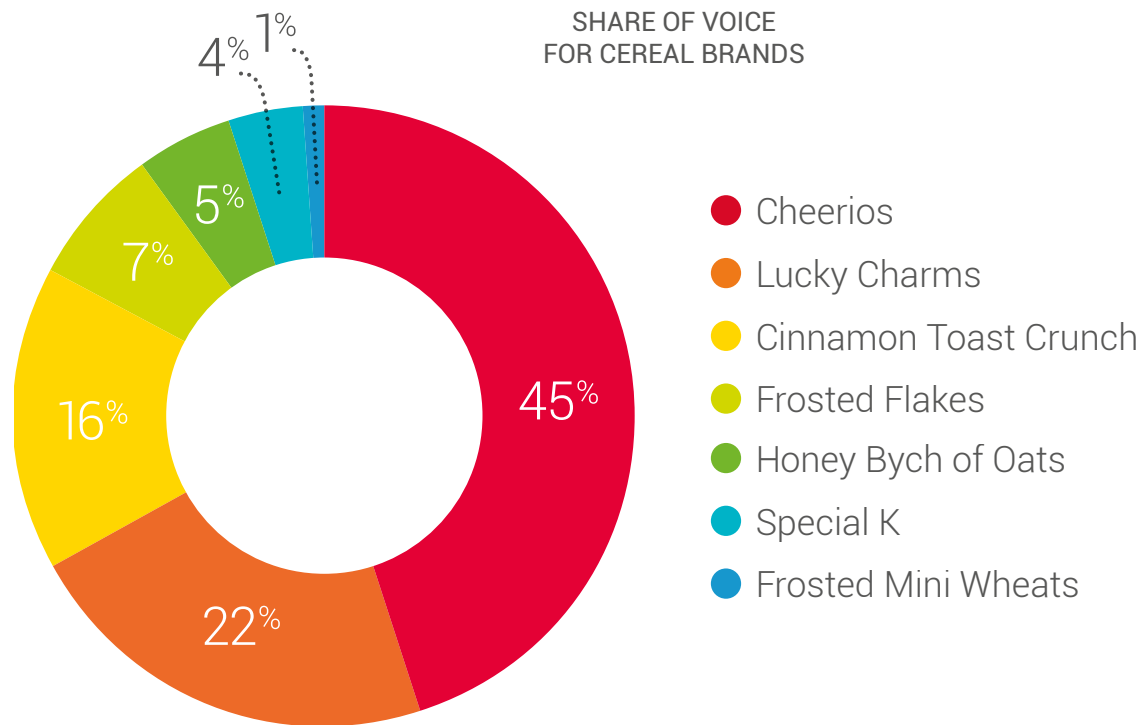


Coca-Cola's performance is largely driven by the success of their **#shareacoke** campaign. To amplify the campaign's reintroduction, Coca-Cola uses a social intelligence platform to identify and respond to tweets referencing "share a coke." Coca-Cola's replies offer users the ability to customize a Coke bottle with any name on it, ultimately driving new forms of revenue and increased interest in Coca-Cola's brand.

On the other hand Red Bull, one of the most formidable brands in the industry, garners considerable social media attention from its extreme sports sponsors, but also capitalizes on events. On Earth Day, Red Bull earned social attention through their video emphasizing the product's relatively lower carbon footprint.

# Restaurant, Food & Beverage Sector Analysis/ Cereal Brands

Among the cereal brands examined, Cheerios garners the greatest volume of directed tweets.



Overall, the cereal sector is less mature and generates far fewer conversations than any other sector analyzed.

A common social media tactic for these brands is to provide sweepstakes opportunities in return for social media coverage. Indeed, the leading hashtag across cereal brands is **#giveaway**.

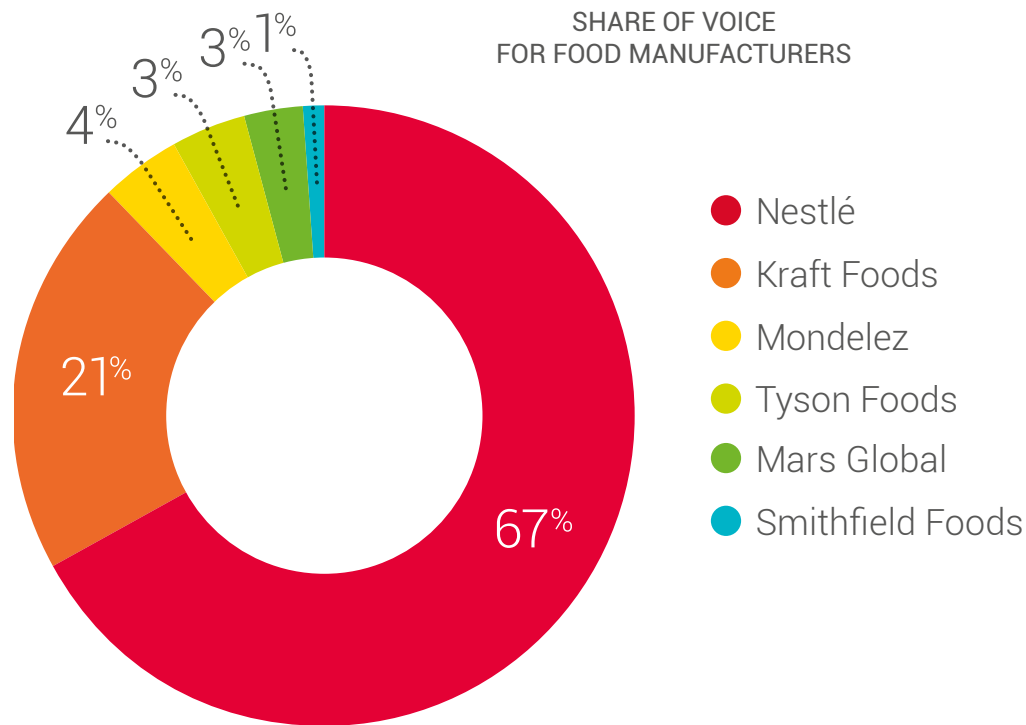
However, while Cheerios does use a sweepstakes strategy, their performance is additionally propelled by strong user generated content. Namely, Cheerios benefits from a number of homemade recipes that incorporate its product.

For the restaurant, food & beverage industry, encouraging and leveraging the creative ideas of an existing community of followers consistently proves to be an effective strategy for generating conversation and newfound passion for products and brands.

# Restaurant, Food & Beverage

## Sector Analysis/ Food Manufacturers

**Of the food manufacturers examined, Nestlé is the central focus of a strong majority of the Twitter conversation.**



However, for most of these major food manufacturers, the holding company acts as a backdrop to their products. While social buzz around specific products is generally positive, a spike in attention toward the larger corporation often indicates negative press.

For Nestlé, their share of voice is indeed largely the result of negative press. In April, nearly 60% of the tweets directed at Nestlé scorn the company for bottling water in the currently drought-ridden state of California.

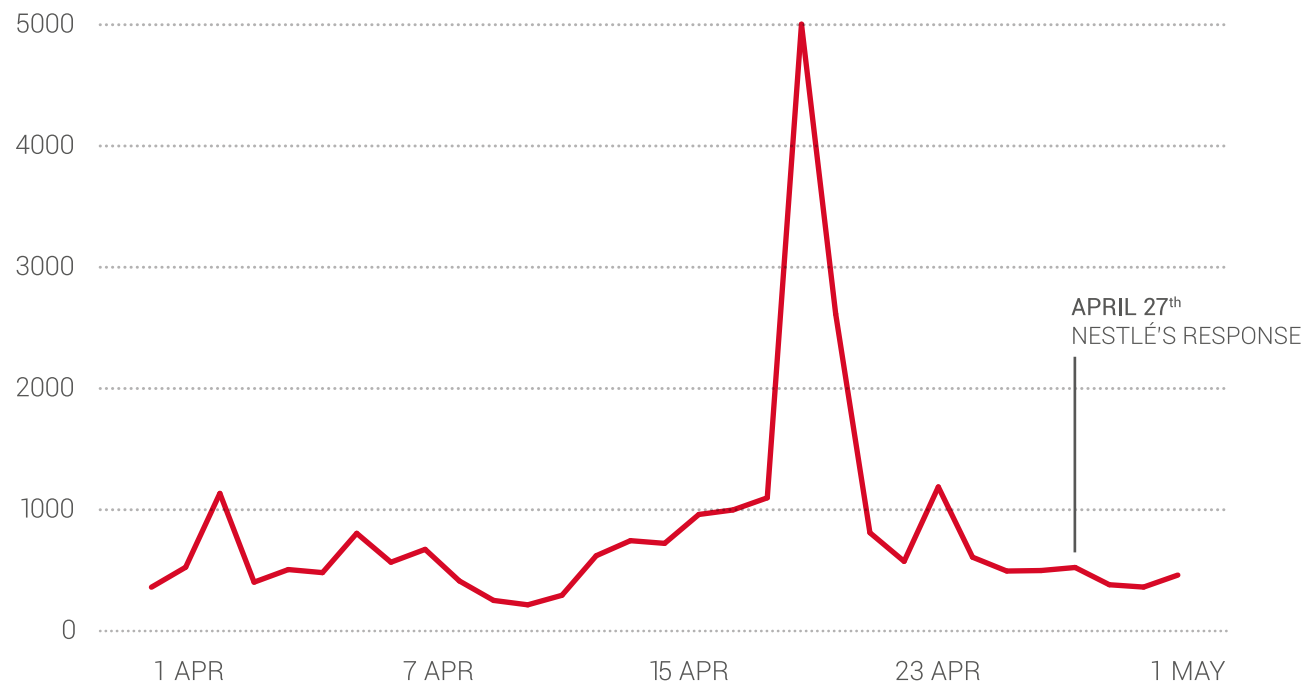
Such crises are common for most major businesses. As is addressed in the following section on Social Media Intelligence Applications, the course of a crisis and its effect on consumers is determined by the way brands respond to the social unrest.

# Restaurant, Food & Beverage

## SMIA/ Nestlé's Crisis Management

**A public relations crisis is an inevitable prospect for many major brands. The effects of a crisis is multiplied when consumers are both passionate and well informed.**

CONVERSATIONS ON NESTLÉ'S BOTTLING PRACTICE IN APRIL



On April 2<sup>nd</sup>, tweets bearing **#deforestation** or **#saveourwater** derided Nestlé's bottling factories in drought-ridden California. However, the issue did not spike until April 19<sup>th</sup>, when **@sumofus** leveraged the activist accounts to petition against Nestlé.

Acting with confidence and poise, Nestlé mimicked other effective PR responses by educating themselves on the issue, creating a website explaining their position and directing their followers to the website. While Nestlé's response was appropriate, their execution eight days after the peak, when the majority of buzz had already passed.

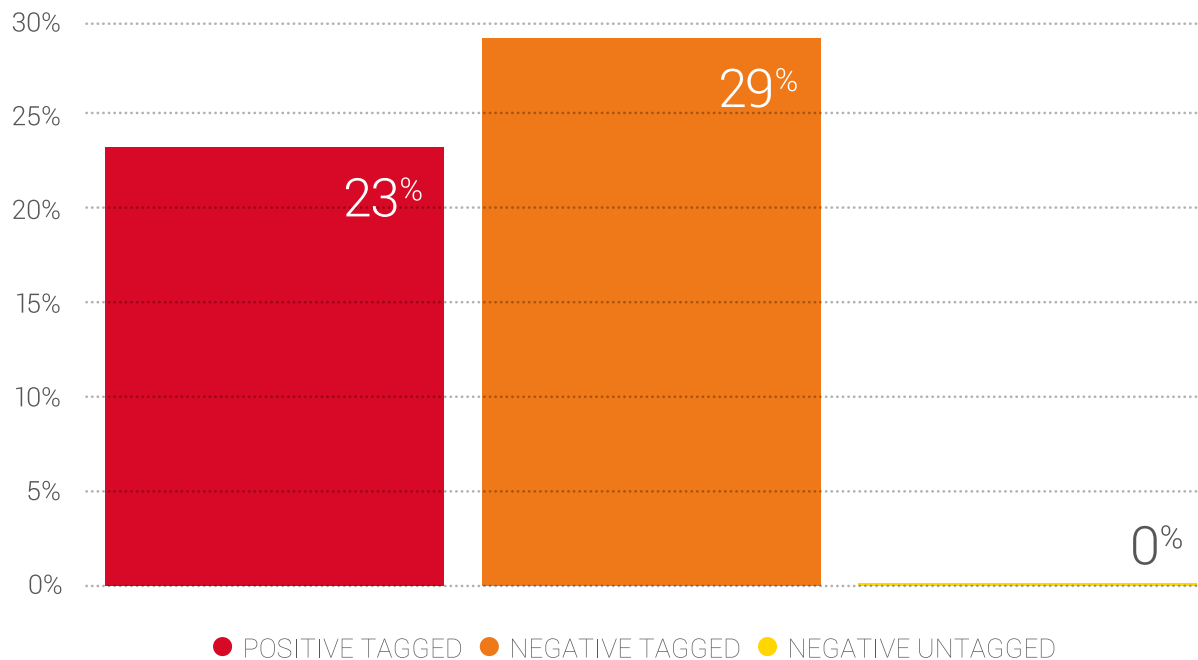
The aim of a social intelligence platform is to both bring awareness to such rising issues early and to provide comprehensive analysis on the conversation so responses are better informed.

# Restaurant, Food & Beverage

## SMIA/ Study on Brand Responsiveness

**Analyzing consumer tweets reveals how effective these brands are at responding to their audience's praise and criticisms.**

LIKELIHOOD OF BRANDS RESPONDING BY TWEET TYPE



The results indicate that these 40 industry-leading brands do not respond to the majority of consumer tweets. Complaints directed at a brand's account are the most likely to receive a reply. The study did not identify a single reply to an untagged complaint.

Of the sectors analyzed, chain restaurants performed the best, responding to 46% of tagged complaints and 38% of tagged praise. However, even these rates are still disparagingly low.

Indeed, multiple studies note the tangible benefits of responding to the consumers.<sup>3,4</sup> It's clear that restaurant, food & beverage brands are missing important opportunities to mitigate crises and amplify praise by engaging with their audience.

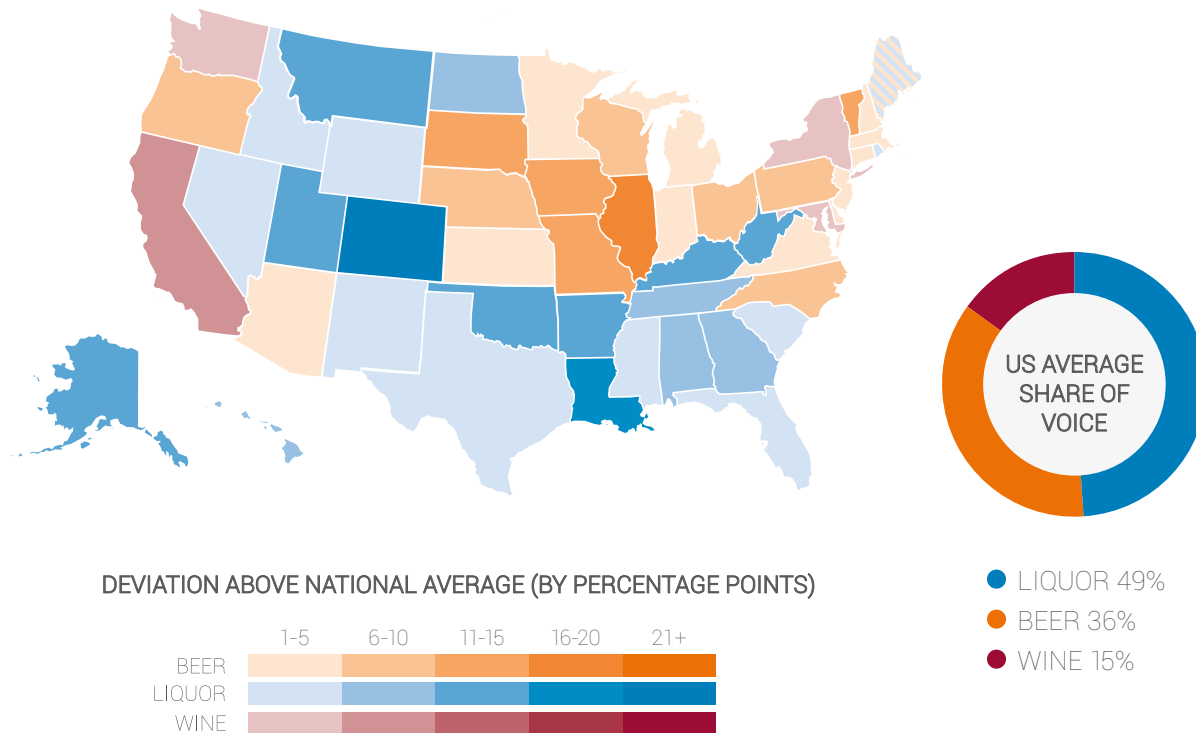
<sup>3</sup>Abeler et al., 2009, <sup>4</sup>Evans et al., 2012

# Restaurant, Food & Beverage

## SMIA/ Market Research: US Alcohol Trends

**Social media data, organic and robust, provides unique opportunities to research, understand and appropriately adjust to public opinion.**

ALCOHOL PREFERENCE RELATIVE TO NATIONAL AVERAGE BY STATE



In this analysis, liquor (49%) maintained more conversation than beer (36%) or wine (15%).

Comparing each state against the national average, while Illinois (18) and Vermont (15) are more likely to discuss beer, Colorado (21) is more likely to discuss liquor. Within Colorado, whisky comprises 28% of liquor chatter. Interestingly, conversation around wine is fairly evenly distributed throughout the US, never deviating more than 6 above or 8 below the national average.

Businesses, looking to identify new markets, can use such analyses to understand how interest in certain topics, products or brands is divided geographically.

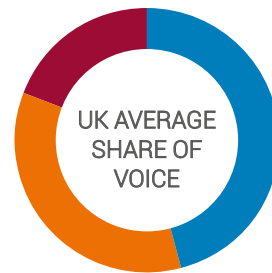
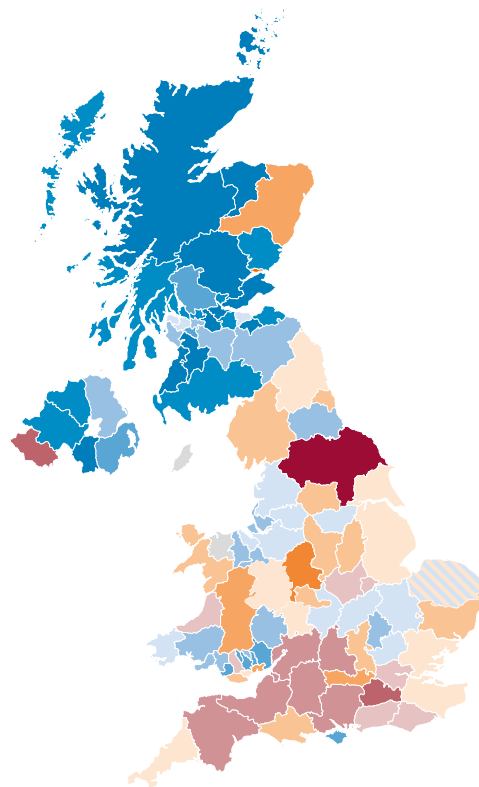


# Restaurant, Food & Beverage

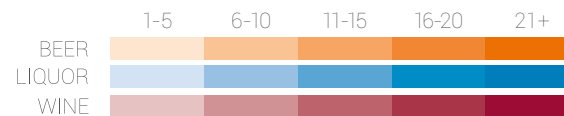
## SMIA/ Market Research: UK Alcohol Trends

**Acknowledging the interest for certain topics is divided geographically, businesses can begin to infer the market landscape and potential opportunities within certain regions.**

ALCOHOL PREFERENCE RELATIVE TO NATIONAL AVERAGE BY COUNTY



DEVIATION ABOVE NATIONAL AVERAGE (BY PERCENTAGE POINTS)



Such analyses help businesses identify a more natural fit for their brand, product or restaurant. For example, recognizing North Yorkshire's predilection for wine, beer brands may be discouraged from devoting their focus to that area.

Yet the implications extend far beyond alcohol preference. On social media, the word "burger" is used alongside "beer" over seven times more often than it's used alongside "wine." In this case, the linguistic association reflects a well-known truth: beer pairs better with a burger than wine does. A burger restaurant may consider that association before operating in North Yorkshire.

However, while burgers and beers are an obvious match, such linguistic analysis can be used to compare the association of any two products.

# Restaurant, Food & Beverage

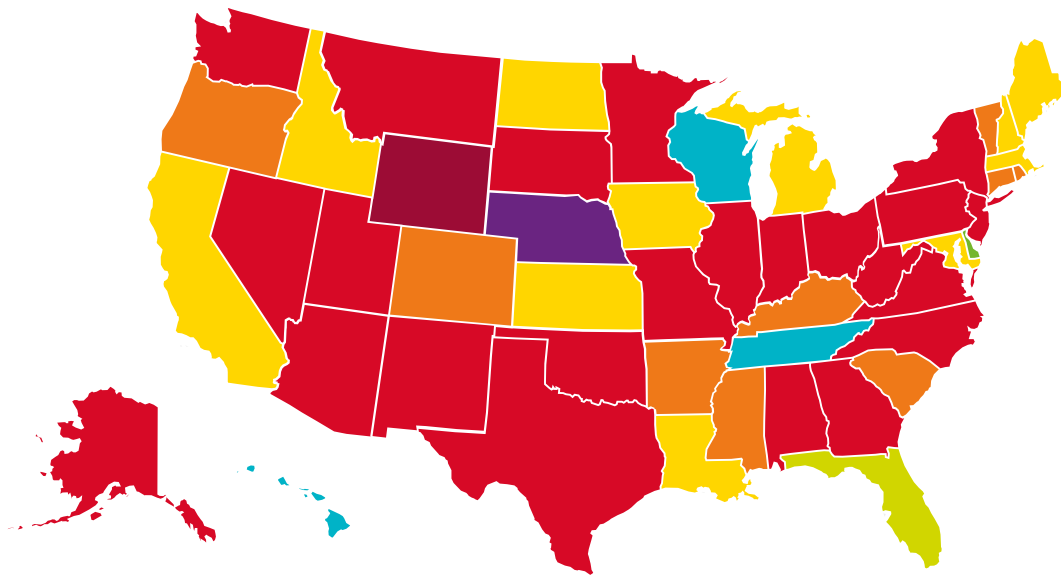
## SMIA/ Intent to Purchase: Pizza Toppings

**While measuring the raw volume of mentions for a product is valuable, uncovering conversations in a certain context helps answer more specific questions.**

The Intent to Purchase Pizza Toppings map depicts the Domino's topping that people most often express a direct interest to buy across the US. By only analyzing conversations with an intent to purchase, the results more accurately reflect sales rather than general interest in the topping.

Businesses can use such research to identify and map out interest or demand across store locations, providing insights that can inform advertising, sales and distribution.

INTENT TO PURCHASE DOMINOES TOPPINGS BY STATE



● PEPPERONI ● BACON ● CHICKEN ● MUSHROOMS ● PEPPERS  
● PINEAPPLE ● STEAK ● BEEF

**James Lovejoy/** @JA\_Lovejoy



Yerp, would love to get a Domino's pizza with Bacon right about now

# Restaurant, Food & Beverage

## Industry-Leading Brands Social Index

The Restaurant, Food & Beverage Social Index ranks the performance of 50 industry-leading brands.

RANK	BRAND	SOCIAL VISIBILITY	SENTIMENT	REACH GROWTH	SOCIAL ENGAGEMENT	OVERALL SCORE
1	Burger King	71.40	8.32	72.96	97.98	250.66
2	Red Lobster	44.90	25.63	78.84	100.00	249.36
3	Oreo	35.23	41.80	35.77	89.35	202.15
4	Smithfield Foods	5.72	63.90	29.55	76.59	175.75
5	Hersheys	8.31	72.73	11.72	81.61	174.37
6	Olive Garden	43.87	25.40	58.02	42.83	170.12
7	TGI Fridays	31.25	6.97	100.00	30.99	169.21
8	7up	10.24	100.00	40.24	14.76	165.25
9	Taco Bell	100.00	8.08	29.07	25.53	162.68
10	Applebees	76.87	27.01	38.16	18.62	160.66
11	Wendys	66.46	8.17	51.08	32.82	158.53
12	Panera Bread	34.57	20.43	84.04	15.19	154.24
13	Anheuser-Busch	15.98	16.08	99.12	16.65	147.84
14	Chilis	37.13	23.18	25.42	56.55	142.28
15	Mondelez	10.58	27.27	53.06	38.98	129.89

Using a unique set of algorithms, each brand is evaluated from 0-100 across four categories:

- **Social Visibility:**  
Measures the amount of buzz a brand generates across social
- **Sentiment:**  
Evaluates the net sentiment of conversation toward brands
- **Reach Growth:**  
Measures the extent to which a brand's social presence is growing
- **Social Engagement & Content:**  
Evaluates how effective brands are at communicating to their audience and how well their content performs

The Composite Score reflects a brand's overall performance across the four categories. For each column, the top 10 performers are highlighted in green while the bottom 10 are highlighted in red.

# Restaurant, Food & Beverage Industry-Leading Brands Social Index

RANK	BRAND	SOCIAL VISIBILITY	SENTIMENT	REACH GROWTH	SOCIAL ENGAGEMENT	OVERALL SCORE
16	Dr. Pepper	28.18	44.48	17.50	27.37	117.53
17	Mountain Dew	55.14	25.09	27.85	7.83	115.91
18	Nestlé	33.05	4.15	59.49	18.38	115.07
19	Coca-Cola	45.53	37.84	9.58	19.22	112.16
20	Dairy Queen	42.08	21.31	30.34	18.18	111.92
21	Cheerios	13.27	44.03	32.31	13.55	103.16
22	Red Bull	48.04	31.23	14.62	9.23	103.12
23	Cheesecake Factory	41.64	14.80	24.95	19.00	100.39
24	KFC	43.85	5.53	22.06	27.53	98.96
25	Dominos	54.47	5.47	15.86	21.99	97.80
26	Subway	57.39	7.69	10.75	19.15	94.98
27	Five Guys	12.00	35.68	20.18	25.76	93.61
28	Outback Steakhouse	28.26	24.29	22.17	13.66	88.38
29	Sprite	9.27	12.46	10.01	54.89	86.63
30	Pepsi	40.47	21.37	4.34	15.56	81.73
31	Buffalo Wild Wings	40.22	11.48	18.99	10.25	80.94
32	Kraft Foods	27.57	12.43	32.46	8.38	80.84
33	McDonalds	50.54	8.62	7.57	11.39	78.12

# Restaurant, Food & Beverage Industry-Leading Brands Social Index

RANK	BRAND	SOCIAL VISIBILITY	SENTIMENT	REACH GROWTH	SOCIAL ENGAGEMENT	OVERALL SCORE
34	Dunkin' Donuts	26.73	13.16	15.11	21.86	76.86
35	Texas Roadhouse	28.89	24.83	15.92	5.87	75.51
36	Papa Johns	34.03	6.56	15.37	18.92	74.89
37	Mars Inc	7.65	18.81	35.07	12.49	74.02
38	Ruby Tuesday	10.32	15.66	15.02	29.83	70.83
39	Pizza Hut	28.18	10.74	14.89	15.62	69.44
40	Nandos	30.58	19.20	4.69	13.49	67.96
41	VitaminWater	9.09	17.97	1.92	22.80	51.78
42	Tyson Foods	9.01	18.98	10.01	12.58	50.58
43	Frosted Mini-Wheats	6.05	1.36	28.26	11.37	47.05
44	Lucky Charms	8.29	10.79	16.43	9.45	44.95
45	Special K	6.68	12.55	0.06	24.30	43.59
46	Fanta	5.38	33.27	3.09	1.73	43.47
47	PF Changs	15.12	15.24	2.89	8.23	41.49
48	Cinnamon Toast Crunch	8.22	14.81	2.31	8.98	34.32
49	Honey Bunches of Oats	18.58	5.26	2.48	6.79	33.11
50	Frosted Flakes	4.71	13.01	0.09	12.66	30.47

Contact @brandwatch to request to add a brand to the next publication of this index.

# Brandwatch Report

## Restaurant, Food & Beverage/ 2015

### Thank you

We hope this report provides your business with some helpful insights on the capabilities and considerations surrounding restaurant, food & beverage industry. Please get in touch if you have any questions on how businesses are leveraging online communication to inform, optimize and facilitate their organization's operations.

### About Brandwatch

Brandwatch is one of the world's leading social intelligence companies. Its social media listening and analytics technology platform gathers millions of online conversations every day and provides users with the tools to analyze them, empowering brands and agencies to make smarter, data-driven business decisions.

Acquiring social influencer analytics firm PeerIndex in December 2014, Brandwatch continues on its aggressive business trajectory following on its most recent round of venture funding to the tune of \$22 million. The Brandwatch platform is used by over 1000 brands and agencies, including Cisco, Whole Foods, Whirlpool, British Airways, Papa John's, and Dell.

**Brandwatch. Now You Know.**

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**Four Peaks Review**