ChangeUp

TOP 100

EXPERIENCE REPORT

THE TOP RETAIL & RESTAURANT BRANDS THAT RESONATE WITH CUSTOMERS

2026

ChangeUp is an award-winning brand strategy and retail design agency designing for the moments where brands and customers meet. We develop brand-led experiences that create change for businesses through strategy, brand design, store design, and architecture. We drive change for fast-moving brands, from startups to the F500. We believe change is inevitable. We make it intentional.

ChangeUp's annual Experience Report is more than a ranking. It is a barometer of how well brands are meeting rising expectations and a guide for those ready to seize the competitive advantage that only great experiences can deliver. It offers a lens for monitoring change over time: what to protect, what to fix, and where to push forward.

Now in its second year, we can see how the landscape is evolving, not just where it stands.

A LOOK BACK

ChangeUp's inaugural Experience Report last year surveyed customers on 200 brands across 20 categories. We found that grocers, outfitters, and specialty retailers filled the upper ranks because they turned ordinary errands into something people looked forward to.

The through-line was willingness. Customers said they would pay more, wait longer, and drive further when a visit felt worth it. Experience had become the competitive frontier, and the brands that treated it that way were pulling away from the ones that didn't.

THE *SHIFT*

That willingness has narrowed this year. People still spend on experience, just on fewer occasions. And every occasion now carries more expectation. Customers have gotten far more selective about what earns a trip.

That selectivity is why we expanded the Report. This year, we surveyed customers on almost twice as many brands. We've also separated our rankings for retail and restaurants. Last year, both categories competed on the same list. This year, each stands on its own, measured against its own field.

Retail held steadier at the top. The stores people walk into weekly kept their footing, and grocery held steady. Discretionary retail didn't. Apparel gave back the most, with home, outdoor, and pet close behind. Those are the trips easiest to postpone and the easiest to hand off to a pickup order.

Meanwhile, dining traffic has softened across the year, even as newer concepts kept pulling people in. Last year, value-seeking looked like a reaction to a rough stretch of prices. This year, it looks like a habit.

The pattern underneath both: A memorable experience is no longer enough on its own. People want a visit that does something for them. Teaches a skill, solves a problem, sharpens a routine, or makes a day better in a way they can name out loud. Pleasant and polished get remembered short-term. Useful gets remembered as a habit.

HIGHER STANDARDS

Two hard years have reset what a visit has to deliver. Labor costs rose, tariffs moved unpredictably, and prices kept climbing. Customers feel all of it, and they are choosing more carefully about where, when, and why they spend.

You can see it in where attention holds. Grocery and mass, the trips people cannot skip, held their experience steady. The instability was in discretionary categories, like apparel and specialty, where a visit that does not feel worth it is the easiest thing to drop. Cause is hard to prove, but the pattern is consistent.

When money is tight, the visit must earn itself.

A place that creates an experience gets kept.

One that only sells gets cut.

INCREASING PRESSURES

Convenience changed what a store visit is for. Pickup, curbside, and third-party delivery each removed a reason to walk in, and where those channels were never given meaning of their own, the visit thinned into a transaction.

There are bright spots.

In-N-Out makes a meal worth retelling, and Texas Roadhouse makes it a habit people keep. Costco and H-E-B stay genuinely hard to replace. Newcomers like Playa Bowls and Chicken Salad Chick pulled people in on purpose in the same year the field slipped. Across categories, the draw holds when a brand designs something customers want to remember and repeat.

Customers will pay more, wait longer, and change habits when the visit feels worth it.

They're far less forgiving of indifference or fatigue.

We measure what revenue cannot show: whether a physical place, and the details that shape it, makes someone want to come back, tell someone, and choose it again. In down years, that is the lever that decides who holds ground.

MORE BRANDS, MORE DATA

Revenue records what already happened. Resonance signals what comes next. The Experience Report pairs a large-scale survey with online sentiment drawn from what customers say about the visit itself, so the ranking shows who is winning and why. As in 2025, every brand here depends on physical experience.

WHY WE WENT BIGGER

Last year's list drew a flood of brands asking to be measured, so we widened it. The field grew from 200 brands to more than 300, with retail up about a quarter and restaurants more than doubled, the category where experience is hardest to win. The more brands in the room, the more the ranking reflects the market rather than the usual names.

HOW BRANDS QUALIFIED

Each brand needed permanent customer-facing locations, an experience designed on purpose, 100+ US locations for broad enough consumer exposure, and a stable footprint through the study. A handful qualified on reach instead of count, where a single store draws from an entire region.

300+
BRANDS RANKED

ADDING

100+
BRANDS THIS YEAR

GATHERING OVER

400K
DATA POINTS

FROM

6,500+
CUSTOMERS

DIMENSIONS OF EXPERIENCE

Customers don't sort a meal from a shopping trip from a stop for coffee. Each one is a lived experience that mixes convenience, delight, memory, and meaning. So we measure 8 drivers of choice, all about how a place makes people feel rather than what sits on the shelf and read them alongside what customers say about being there. Together they resolve into one measure of resonance. Retail and restaurants are scored against the same 8 on separate lists.

Unprompted Visit Desire

What it measures: Whether customers think of you first without a specific need.
Why it matters: Indicates true mental availability and instinctive pull that competitors struggle to dislodge.

Memorability

What it measures: How well the visit sticks in memory.
Why it matters: Memorable moments fuel repeat behavior and natural storytelling long after the visit.

Advocacy

What it measures: Unsolicited recommendations, the "you have to try..." conversations.
Why it matters: Proves emotional connection and creates credible, efficient growth.

Novelty

What it measures: Regular innovation and evolution customers can feel.
Why it matters: Raises delight, prevents fatigue, and signals a brand that is moving forward.

Return Intent

What it measures: Unprompted desire to come back soon.
Why it matters: Distinguishes genuine eagerness from habit or convenience and signals competitive distinction.

Substitutability

What it measures: Whether customers would genuinely miss you if you disappeared.
Why it matters: Not being easily substitutable so you're distinctive enough to be worth a trip, even when options abound.

Relevance

What it measures: How well you meet practical needs in the moments that matter.
Why it matters: Keeps the offer aligned with evolving expectations and protects everyday choice.

Staleness

What it measures: Active decline in appeal.
Why it matters: Early warning that equity is eroding even if short-term numbers look stable.

How Sentiment Analysis Augments The Report

To ensure these dimensions reflect lived reality, we layered AI-powered sentiment analysis across a wide range of consumer reviews and social conversations during the past year. The analysis focused exclusively on physical, in-person experiences and captured the balance of positive and negative impressions that shape how people talk about brands.

These signals bring texture to the eight dimensions, surfacing what customers remember, recommend, anticipate, and value most. By cutting through the blur between delivery, appeal, and perceived value, sentiment analysis sharpens the diagnostic power of the Report and reveals patterns that traditional surveys alone cannot uncover.

RETAIL

DEEP DIVE

THE RETAIL LANDSCAPE

Retail is where experience is under the most pressure right now. Pickup, delivery, and curbside pulled discovery and familiarity out of the store, and a visit that used to include both can now feel like collection.

The strongest performers give people a reason to walk in anyway, through service, theater, and a sense of place. When the store is run mainly as a cost center, customers miss it less.

THE TOP 50

01 Costco Wholesale	02 H-E-B	03 Fleet Feet	04 vuori	05 JD	06 LUSH	07 sam's club	08 Wegmans	09 Buc-ee's	10 Publix
11 Kwik Trip	12 west elm	13 alo	14 ARITZIA	15 Trader Joe's	16 Bass Pro Shops	17 Harris Teeter	18 Altar'd State	19 lululemon	20 Abercrombie & Fitch
21 White House Black Market	22 Bath & Body Works	23 Soma Intimates	24 Boot Barn	25 REI co-op	26 giant eagle	27 Menards	28 Champs Sports	29 TORRID	30 Tiffany & Co.
31 ShopRite	32 ULTA Beauty	33 Sephora	34 patagonia	35 Food Lion	36 Red Wing Shoes	37 Kroger	38 ALDI	39 Total Wine & More	40 meijer
41 ATHLETA	42 Williams Sonoma	43 Urban Outfitters	44 Kendra Scott	45 HomeGoods	46 Stop&Shop	47 Barnes & Noble	48 Anthropologie	49 Build-A-Bear Est. 1997	50 The Vitamin Shoppe

RETAIL BRANDS

THE TOP 10 RETAIL

Consumers' top ten strongest retail experiences in 2026, and the specific thing each one does better than most.

01

Volume with a payoff

The large layout holds so much across so many categories, so members walk the whole box to find what they came for. The reward at the end is high quality at a good value.

02

A grocer institution more than a chain

Texas shoppers talk about it the way they talk about hometown teams. Local assortment and staff who act like owners drive the experience and irreplaceability.

03

Diagnosis before purchase

Nothing gets sold until someone measures and watches you move. Runners come back for the person who helped them, not just the walls of curated footwear.

04

A store that doubles as a wellness space

Events, comfortable seating, and staff who talk about training rather than selling. First-timers describe the space before they describe the clothes.

05

Sneaker culture, staged

Scarcity sets the schedule. Customers show up regularly to see if something new is out. They seek what lands each week, not just to replace something worn out.

06

Made to be handled

Product sits unwrapped and out in the open, with sinks at the counter to encourage interaction. The decision can happen after touching and experiencing.

07

A warehouse worth wandering

Bulk basics anchor the run, but a rotating slate of one-off finds keeps people walking around and browsing happens without anyone intending it.

08

Worth the drive, not just a convenient stop

Range, prepared food, and staffing deep enough that shoppers bypass other grocers and cross county lines. The weekly errand becomes a small outing.

09

The stop that became the reason

Scale, immaculate restrooms, and a merchandise hall turn a fuel break into the destination. Nobody simply passes through just for gas.

10

Service is the differentiator

Associates take you to the shelf and carry the bags out. The stores are clean and pleasant rather than designed, and it is the service customers describe.

STABLE LEADERS

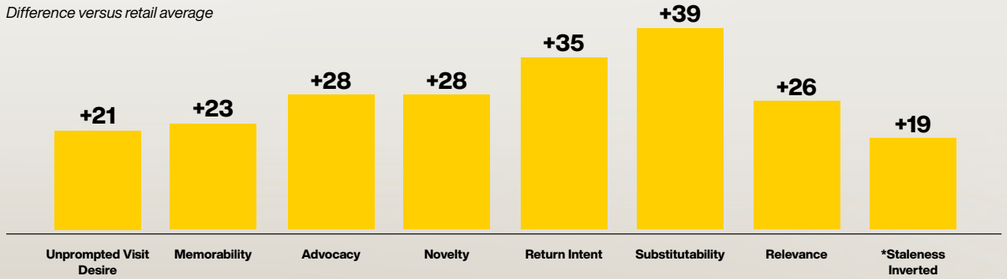
COSTCO WHOLESALE

#1 RETAIL Experience score increase from 2025

The layout holds a lot across many categories, so members walk the whole store to find what they came for. What they find is high quality at a good value, which is why the trip gets repeated.

Costco is one of a few brands to improve measurably on the survey this year. It performs higher than the retail average on all dimensions, with much higher natural Advocacy and Novelty than 2025. Recent changes have made the trip faster at entry and checkout without taking away the browsing.

Difference versus retail average



Staleness is shown inverted, so a higher bar means less reported decline in appeal.

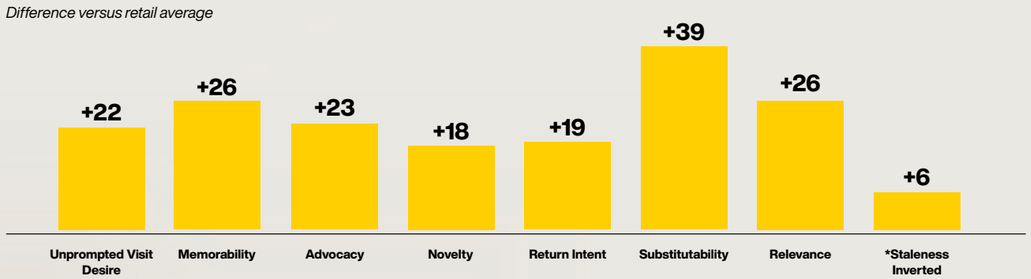
H-E-B

#2 RETAIL

H-E-B's hold on Texas shoppers remains strong. Loyalty has been earned over time, built on local pride and a strong track record of giving back to the communities it serves.

H-E-B held its position with no measurable move in either direction. It performs higher than the retail average on most dimensions, continuing to push loyalty and connection with customers.

Difference versus retail average



NEW IN 2026 RETAIL

Of the Top 50 retail brands, 15 of them were new to the study this year. And they didn't just fill in behind the incumbents. They clustered at the top. Very few new brands landed near the bottom.

The formats repeat: athletic apparel, beauty, specialty grocery, and outdoor. What they share is a narrow assortment and a reason to walk in, whether that is fitting, sampling, or staff who know the category.

Costco, H-E-B, Fleet Feet, Kwik Trip, and Trader Joe's all stayed at the top. The movement is in everything below it.

vuori

#4 · athletic apparel, community-style stores

Wegmans

#8 · grocery as destination

JD

#5 · sneaker retail built on new releases

BUC-EE'S

#9 · travel center as destination

LUSH

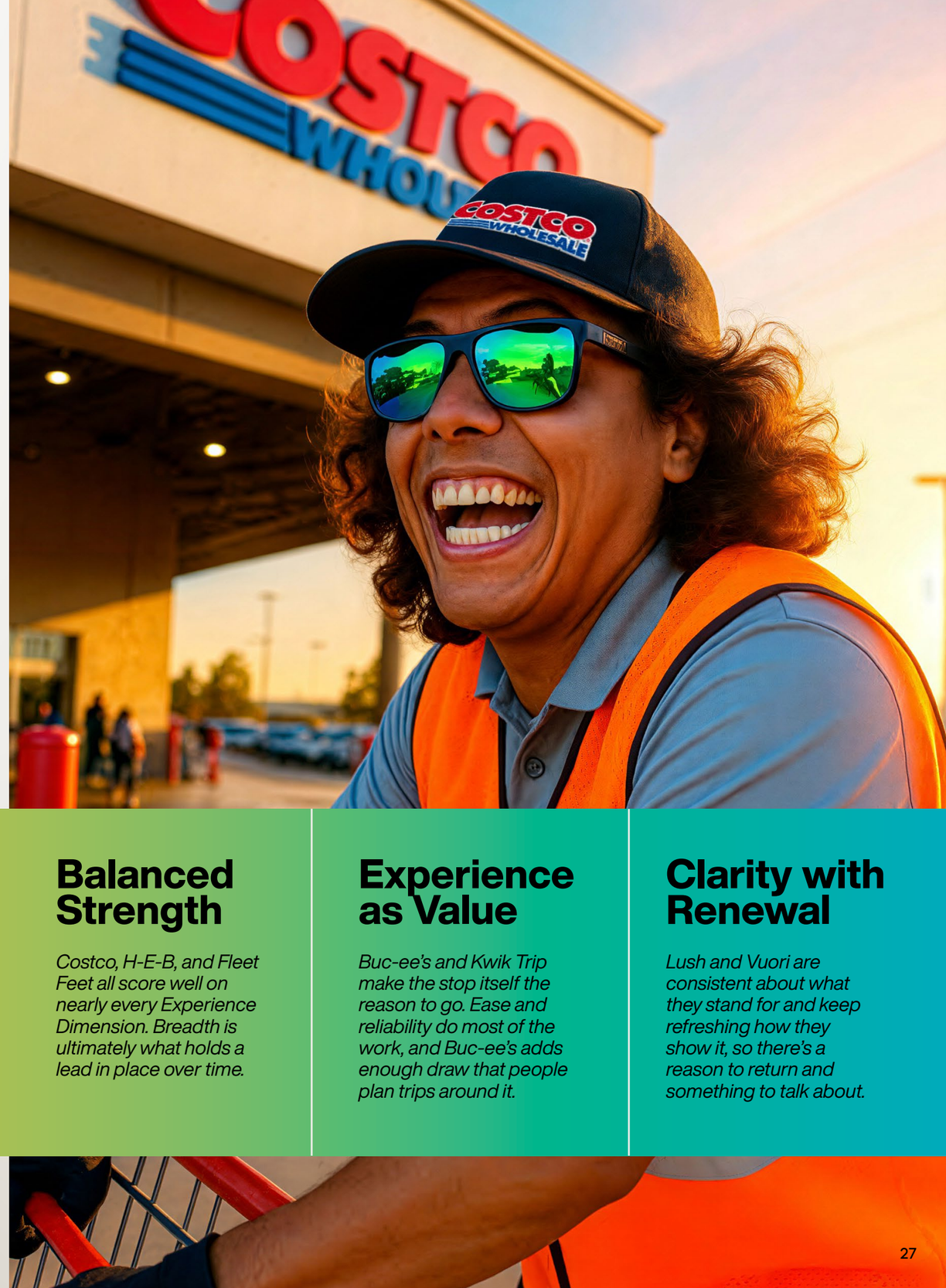
#6 · hands-on, sensory beauty

alo

#13 · apparel store with wellness space

WHAT THE TOP 50 RETAIL BRANDS SHARE

The leaders score well across every dimension instead of spiking on one, and that balance is what turns a useful visit into a habit. Most of the Top 50 cluster doing many of the same things well and score close together.



Balanced Strength

Costco, H-E-B, and Fleet Feet all score well on nearly every Experience Dimension. Breadth is ultimately what holds a lead in place over time.

Experience as Value

Buc-ee's and Kwik Trip make the stop itself the reason to go. Ease and reliability do most of the work, and Buc-ee's adds enough draw that people plan trips around it.

Clarity with Renewal

Lush and Vuori are consistent about what they stand for and keep refreshing how they show it, so there's a reason to return and something to talk about.

WHEN A VISIT IS JUST AN ERRAND

The bottom of retail is a mix of transactional formats, wireless stores, drugstores, dollar and off-price, alongside several long-established department names. What they share isn't a category, it's a feeling: the visit reads as an errand rather than an experience. Low on Unprompted Desire and Novelty, and highly Substitutable.

Common traits of bottom performers

FUNCTIONAL BUT FORGETTABLE

Practical visits with little emotional weight. Memory and Advocacy scores sit low.

DILUTED MEANING

Familiar names where the distinctiveness that once set them apart has thinned.

A SUBSTITUTABLE BRAND

Shoppers see little difference from the alternatives. Switching costs are near zero.

RESTAURANT

DEEP DIVE

THE TOP 50

01 In-N-Out Burger	02 Texas Roadhouse	03 Playa Bowls	04 sweetgreen	05 Chick-fil-A	06 Chicken Salad Chick	07 Dutch Bros Coffee	08 Culver's	09 Raising Cane's Chicken Fingers	10 Cooper's Hawk Winery & Restaurants
11 Torchy's Tacos	12 Rita's Ice Custard Happiness	13 Caribou Coffee	14 True Food Kitchen	15 Eggs Up Grill	16 Seven Brew Drive Thru Coffee	17 Skyline Chili	18 Melting Pot	19 Portillo's	20 The Original Taco Cabana Mexican Patio Cafe
21 Capriotti's Sandwich Shop	22 LongHorn Steakhouse	23 Mellow Mushroom	24 Handel's Homemade Ice Cream Since 1945	25 Smoothie King	26 Braum's	27 Teriyaki Madness	28 Famous Dave's	29 Penn Station East Coast Subs	30 Dave & Buster's
31 Beef 'O' Brady's Good Food, Good Sports	32 Chipotle Mexican Grill	33 Cook Out	34 Scooter's Coffee Est. 1998	35 CAVA	36 Fogo de Chão	37 Nothing Bundt Cakes	38 Benihana	39 Huddle House	40 Logan's Roadhouse
41 Tropical Smoothie Cafe	42 Mission BBQ The American Way.	43 Ruth's Chris Steak House	44 Mountain Mike's Pizza	45 Peet's Coffee	46 Bar Louie Kitchen + Cocktails	47 Tim Hortons	48 Wing Stop	49 Tijuana Flats Tex-Mex for All	50 Cafe Rio Mexican Grill

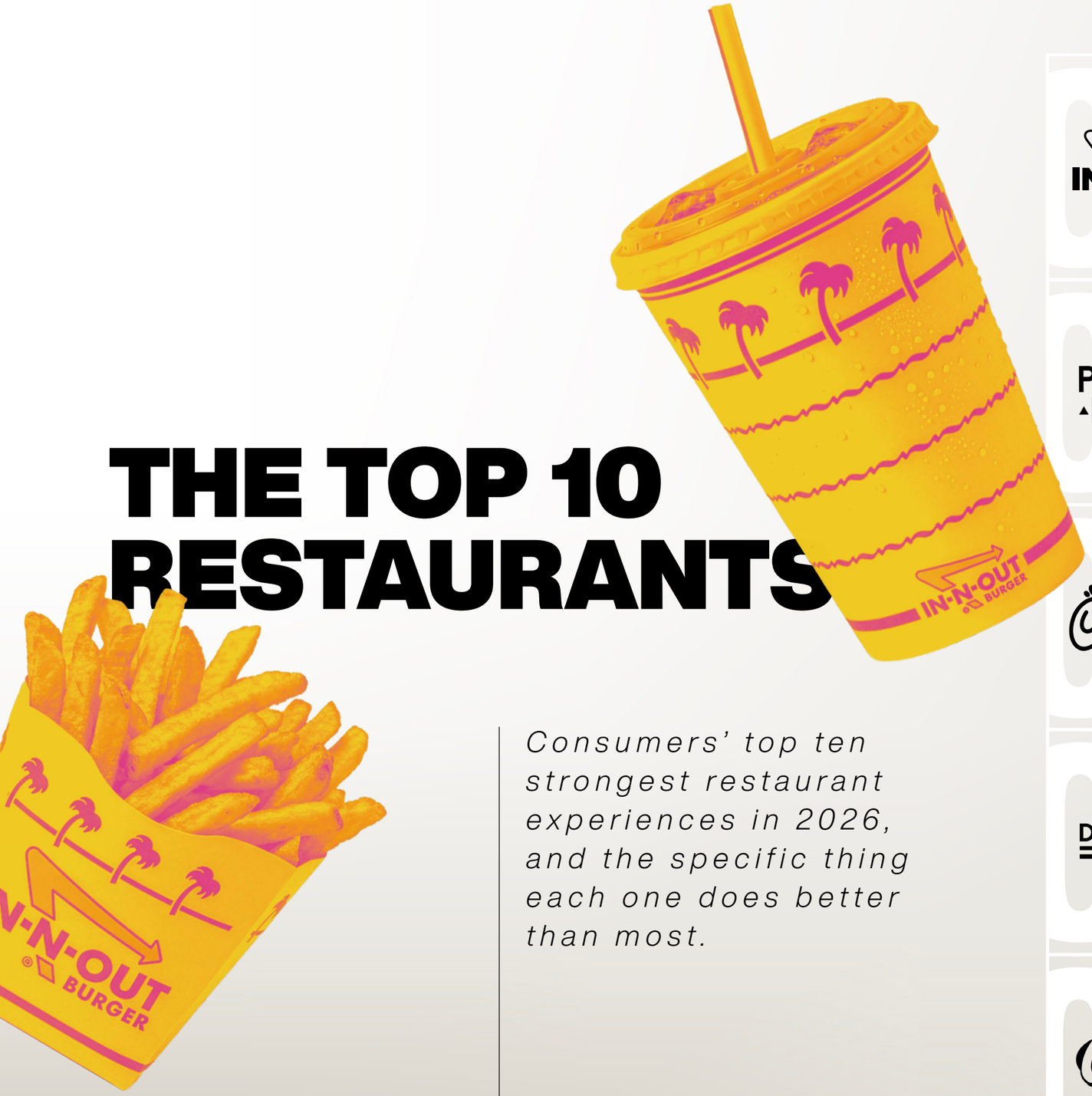
RESTAURANTS

THE RESTAURANT LANDSCAPE

Restaurants are judged against a higher bar than they were a few years ago. Customers know meals can arrive in minutes, and rising menu prices turn dining out into a more considered purchase. Value is more than just about cost. It's more inclusive of whether the experience was worth what it took to get there and what it cost.

Plenty of brands promise an elevated visit but deliver throughput instead. Fast casual can look well-designed and still move like an assembly line, and casual dining can chase trends without making clear why they matter. The ones that do best give people something to remember, and a reason to want it again.

THE TOP 10 RESTAURANTS



Consumers' top ten strongest restaurant experiences in 2026, and the specific thing each one does better than most.

01 — In-N-Out Burger

A short menu, unchanged for decades

The menu has barely changed, the food is cooked in view of the counter, and the chain is in only a handful of states.

02 — Texas Roadhouse

A dining room meant to be loud

The noise, the staff, and the pace make dinner feel like an event rather than a meal. Guests treat the atmosphere as part of what they paid for.

03 — Playa Bowls

A healthy customized quick order in a place worth sitting

Surf-shack interiors and a build station in full view. Most brands at this price expect you to leave, and this is set up a bit more for staying.

04 — sweetgreen

Healthy, fresh fast food that feels curated

Visible prep, seasonal menus, and interiors closer to a coffee shop than a chain. The only top-ranked restaurant to improve measurably this year.

05 — Chick-fil-A

The same service in every location

Accuracy and courtesy hold up at the counter and in the drive-thru line, market to market. Customers know what they will get before they arrive.

06 — Chicken Salad Chick

Table service at fast-casual speed

Food brought to the table, named menu items, and staff who recognize regulars. The warmth is the reason people come back.

07 — Dutch Bros Coffee

A drive-thru built around conversation

Crews come out to the line, lean out the window, and ask about your day, yet they still keep the line moving. The stop feels social, not just efficient.

08 — Culver's

Fast food with sit-down service

Orders are brought to the table, and the menu offers variety for everyone and leans on fresh and family-farm ingredients. Service closes the gap compared to some competitors.

09 — Raising Cane's Chicken Fingers

One item, done consistently right

Chicken fingers, one sauce, and a short menu. Customers read the narrow focus as confidence rather than limitation.

10 — Cooper's Hawk Winery & Restaurants

A restaurant with a wine club attached

A Napa-style tasting bar at the entrance, ahead of the upscale dining room. The wine club gives a standing reason to book the next visit.

THE LEADERS: OLD AND NEW

In-N-Out holds the top restaurant spot for a second year and the highest new entry is Playa Bowls at number three.

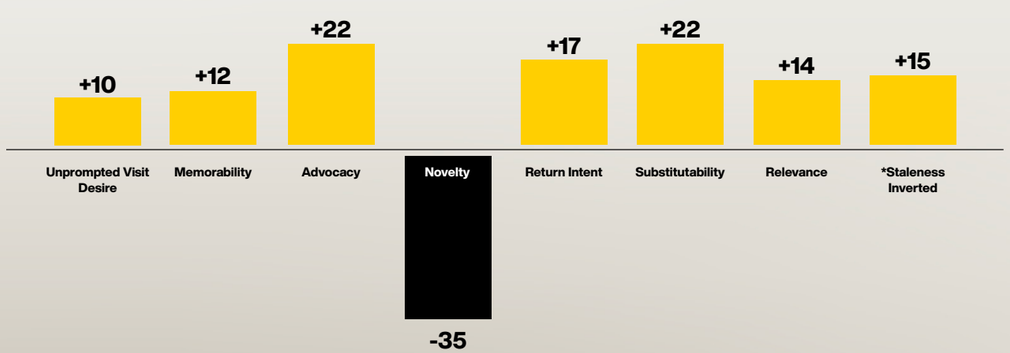
IN-N-OUT BURGER

#1 RESTAURANT

The menu has barely changed since opening, the food is cooked where customers can see it, and the chain operates in only a handful of states. Limited availability does the work that advertising does for other brands.

Novelty still scores well below average, which is expected for a brand built on a consistent menu. One metric fell versus 2025, Unprompted Visit Desire, something worth watching as they expand into new regions.

Difference versus restaurant average



Staleness is shown inverted, so a higher bar means less reported decline in appeal.

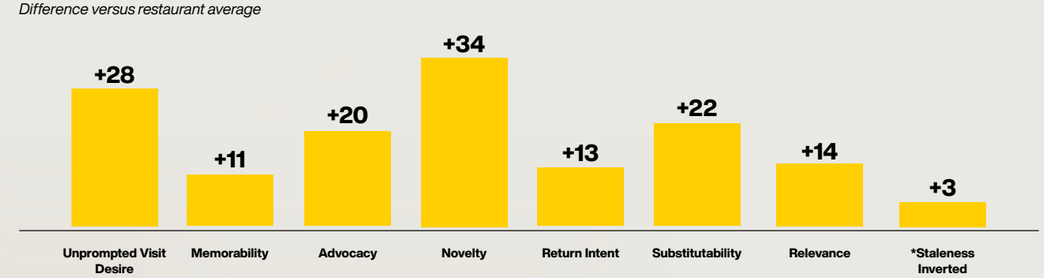
PLAYA BOWLS

#3 RESTAURANT

Started as a beach pop-up with one blender and grew to more than 400 shops without losing the surf-shack build. Fruit bought fresh daily, seven bases, and 37 named bowls a customer can also rebuild from scratch. The bowl is assembled in front of you, which makes the wait part of the visit rather than a delay. Customers tend to treat getting a bowl as an outing rather than a stop.

It enters at number three on its first appearance with strengths for Novelty and Unprompted Visit Desire.

Difference versus restaurant average



WHAT TRAVELS ACROSS FORMATS

The leaders turn a meal into something worth choosing and retelling. Across very different formats, three traits show up again and again.

Unique Signatures

In-N-Out's Animal Style, Chick-fil-A's sauce, Texas Roadhouse's fresh rolls, craveable specifics that become part of the customer's routine and conversation.

Destination by Design

Torchy's Tacos and Cooper's Hawk have rooms with a point of view rather than a template. The space itself gives people a reason to come.

Consistency at Scale

Chick-fil-A, Culver's, and Dutch Bros deliver the same experience across a thousand-plus locations, the hardest thing to do in food, and the surest driver of Return Intent.

NEW IN 2026 RESTAURANTS

37 of the Top 50 restaurant brands are new to the survey this year. The new arrivals clustered at the top rather than filling in behind the incumbents. Very few new brands landed near the bottom.

The formats repeat: bowls, coffee, frozen treats, and regional chains people feel some ownership of. Nearly a third of the new brands sit in those four groups.

The new brands are also smaller. The median newcomer runs about 158 units against about 900 for returning brands. In-N-Out, Texas Roadhouse, Chick-fil-A, and Culver's all held top positions, so the top did not turn over. The movement is in everything below it.

#3 · bowls in a room built for sitting

#6 · table service at fast-casual speed

#7 · drive-thru built on crew interaction

#10 · dining room plus tasting room

#11 · regional taco chain

#12 · frozen treats, walk-up format

LOSING THE PULL

The bottom of the restaurant field is largely long-established national chains. They're still widely recognized, but the pull has thinned. In a category full of choice, incumbents tend to become the fallback while newer entrants draw the curiosity.

Common traits of bottom performers

A SUBSTITUTABLE BRAND

Comparable offerings across the category make loyalty fragile.

WEAK VISIT DESIRE

Even well-known names see less spontaneous craving than the field.

DIMINISHED ADVOCACY

Less cultural currency to fuel word of mouth.

ACROSS

THE FIELD

WHERE GROWTH (OR DECLINE) MATTERS

Of the almost 200 brands measured in both years, very few improved or declined significantly. Everything else held, so the field itself did not get worse.

What changed is the size of the field. 100+ brands entered the study this year, and they did not enter at the bottom. A brand can hold its score and still lose ten or twenty ranks, because the brands ranked against it are new to the field yet scoring higher.

The few wins are backed by investment and innovation into their brands. The declines are concentrated in discretionary retail categories.

WHERE IT SLIPPED · DISCRETIONARY RETAIL

Specialty apparel
The widest cluster of declines

Outdoor & sporting
Notable drops among last year's high scorers

Home & big-box
Furnishings and home improvement both softened

Crafts & specialty
Hobby and pet retail slipped together

WHICH TOP 50 MOVED SIGNIFICANTLY

Gained

↑

COSTCO WHOLESALE	sweetgreen	Bath&BodyWorks	Kroger
(#1 retail)	(#4 restaurant)	(#22 retail)	(#37 retail)

Declined

↓

lululemon	BOOT BARN	REI co-op	SEPHORA
(#19)	(#24)	(#25)	(#33)
ATHLETA	BARNES&NOBLE	BUILD-A-BEAR EST. 1997	
(#41)	(#47)	(#49)	

Gain and loss based on brands in 2025 and 2026 survey composite of the eight Experience Dimensions at 90% confidence.

BRANDS TO WATCH

Where the momentum is heading into next year.

The destination newcomers

Playa Bowls, Dutch Bros, Buc-ee's. New to the study and landing near the top, with formats built to be chosen rather than defaulted to.

The proven anchors

Costco, H-E-B, Trader Joe's, In-N-Out, Texas Roadhouse, Chick-fil-A. Holding the very top by treating the store or restaurant as the product itself.

The ones who held

Publix and Chick-fil-A. Both scores essentially held flat year-over-year, so each held their ranking because the field around them fell. In a down year, steadiness is a strategy.

EARN THE VISIT

Scale and ubiquity stopped guaranteeing loyalty some time ago. What separated the brands that held this year from the ones that slipped is whether the place itself was worth choosing. Three moves make the difference:

Three moves for every brand

01 **Protect**
The reason people come without being prompted.

02 **Fix**
The part of the visit that quietly costs you the next one.

03 **Push forward**
Into what only your space can do.

THE BOTTOM LINE

Two difficult years have driven people to ration their trips more. Now, rationing is a habit, and habits don't unwind just because prices do.

So the trips that held were the ones nobody could postpone. Every significant decline in this year's report came from retail.

While pickup and delivery absorbed the part of shopping nobody enjoys, it's also what used to get shoppers through the door. What's left must earn the walk-in on its own, and many brands haven't figured out how.

The brands at the top did. Costco built a box worth walking. H-E-B hired people who act like owners. In-N-Out has barely changed in decades and customers read that as confidence, not caution. Publix held its ranking with no measurable dimension move and moved up in raking as the field around it fell. That only works once.

Customers will keep taking fewer trips and asking more of each one. And every place in this report is now measured against the day the customer stayed home instead. Fewer trips also means longer gaps between visits. A visit somebody makes four times a year has to leave behind enough to survive the other 361 days. That residue gets built on purpose or it doesn't get built.

Next year's report will inevitably reward the brands that decide what a visit is for, and then build the place to deliver it.

LET'S TALK

ChangeUp

changeupinc.com
retail@changeupinc.com
844 804 7700

Whether or not your brand made the Top 100, there is more to uncover in the data: what's quietly costing your business, where to maximize your unique strengths, and what about your experience is resonating or falling flat. Reach out to our team for additional insights and a closer look at what's actually shaping your brand experience.

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