

Brand Clarity, Favorability, and Originality of the Top 26 Quick Service Restaurants

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BACKGROUND

The Zion & Zion market research team is engaged in an in-depth series of studies to understand how consumers perceive the personalities of top U.S. brands. We began this effort with a deep dive into the brand personalities of the 26 largest quick service restaurants (QSR). Our other QSR brand studies include a [Zion & Zion study that looks at how restaurant chains rank](#) on Aaker's (1997) classic five dimensions of brand personality and another [Zion & Zion study that employed both confirmatory and exploratory factor analysis](#).

Now, the Zion & Zion market research team turns its attention to the concept of *Brand Personality Appeal*, an additional and different way to measure how consumers view a brand's personality. First identified and studied by Traci Freling, Jody Crosno, and David Henard in their well-regarded study, "Brand Personality Appeal: Conceptualization and Empirical Validation," (2010, Journal of the Academy of Marketing Sciences), this method identifies to what extent a brand's personality is viewed as having Brand Personality Appeal Clarity, Brand Personality Appeal Favorability, and Brand Personality Appeal Originality. In our Zion & Zion study, we'll look at how the top 26 QSRs rank on these three important dimensions and in another Zion & Zion study, we demonstrate through multiple regression the extent to which a brand personality's Clarity and Originality impact its Favorability.

EXECUTIVE SUMMARY

The Zion & Zion research team continues its deep dive into brand personalities by studying the Brand Personality Appeal of the 26 largest quick service restaurant (QSR) chains in the U.S. We surveyed 4,363 adults 18 years of age and up. Each respondent was asked about one of the 26 QSRs. Our research team only included data from those who were at least somewhat familiar with the particular QSR they were being asked about. That resulted in a usable data set of 3,205 responses.

Brand Personality Appeal is divided into three distinct factors—Clarity, Favorability, and Originality—which, when considered together, provide important predictors of purchase intentions (Freling, Crosno, and Henard, 2010).

In our study, Wingstop ranked highest out of the 26 QSRs in Brand Personality Clarity and Brand Personality Favorability, and third in Brand Personality Originality. Chick-fil-A ranked first in Originality, third in Clarity, and fourth in Favorability. Other QSRs that ranked consistently high on various dimensions include Panera Bread (second in Favorability and fifth in Originality) and Dairy Queen (second in Clarity and fourth in Favorability).

Some of the largest and most well-known brands displayed consistently less strength in aspects of Brand Personality Appeal, including McDonald's (26th in Favorability, 26th in Originality, and 22nd in Clarity), Burger King (26th in Clarity, 25th in Favorability, and 25th in Originality), Papa John's (24th in all three factors), and Jack in the Box (23rd in all three factors).

BRAND PERSONALITY APPEAL

Researchers have long sought to understand how a brand's personality may affect consumer patronization. This is because when products and services become highly commoditized, creating and nurturing a brand's personality may be an optimal way to foster differentiation, promote trial, and enhance loyalty.

The gold standard in quantifying a brand's personality has long been Aaker's five dimensions (Sincerity, Excitement, Competence, Sophistication, and Ruggedness), which set the bar for studying how human characteristics could be utilized to understand how consumers view a brand's personality. But since Aaker's groundbreaking work was published in 1997, subsequent researchers have used her framework as a departure point for further analysis and refinement. One such study is the previously mentioned Brand Personality Appeal research by Freling, Crosno, and Henard, who set forth that a brand's appeal "influences target consumers' purchase decisions and helps to sustain the endurance of a brand's perceived personality between promotional cycles." The Brand Personality Appeal framework seeks to measure the strength of a brand's personality based on three factors:

- Favorability—The extent to which consumers positively regard a brand's personality
- Originality—The extent to which consumers perceive a brand's personality to be novel and distinct from other brands in the same category
- Clarity—The extent to which a brand's personality is apparent and recognizable to consumers

While Aaker's framework identifies the personality characteristics of a brand, the Freling, Crosno, and Henard research helps shed light on the next question: How appealing is a brand's personality, and how do we measure that appeal? The three dimensions of Brand Personality Appeal are assessed through the 16 semantic differential scale questions shown in Figure 1.

Figure 1

Brand Personality Appeal Dimensions and Semantic Differential Scale Questions					
Favorability		Originality		Clarity	
Unsatisfactory . . .	Satisfactory	Common . . .	Distinctive	Unapparent . . .	Apparent
Unpleasant . . .	Pleasant	Ordinary . . .	Novel	Indistinct . . .	Distinct
Unattractive . . .	Attractive	Predictable . . .	Surprising	Not Obvious . . .	Obvious
Negative . . .	Positive	Routine . . .	Fresh	Vague . . .	Well-Defined
Bad . . .	Good			Unclear . . .	Clear
Poor . . .	Excellent				
Undesirable . . .	Desirable				

OUR DATA

Employing the Brand Personality Appeal framework, the Zion & Zion research team conducted an in-depth study of the nation's largest QSR restaurant chains. To accomplish this, a random sample of 4,363 consumers aged 18 and up from across the nation were surveyed and each respondent was asked to evaluate a single restaurant on the 16 semantic differential scale questions making up the three Brand Personality Appeal dimensions.

Survey respondents were first asked to rate how familiar they were with each restaurant on a scale of 1 to 7, with 1 indicating that they were "very unfamiliar" with the QSR brand and 7 meaning that they were "very familiar" with the QSR brand.

In order to ensure that the study's results were based on meaningful data, we only included responses from those who answered 5, 6, and 7 on the familiarity scale, which resulted in a usable data set of 3,205 responses.

Our research team reviewed the 30 largest U.S. QSR restaurants by U.S. systemwide sales. However, our research team excluded from this project those with less than 1,000 locations. The remaining 26 restaurants were included and ranged from the largest being McDonald's at \$37.4 billion in revenue from 14,036 locations, to Wingstop at \$1.08 billion in revenue from 1,037 locations.

Our research team used the same seven-point semantic differential scales used in the original Brand Personality Appeal research study and shown in Figure 1. All questions were randomized to control for any ordering.

As an example, in this Zion & Zion study, respondents were asked to choose where a QSR's brand personality lay between contrasting words. The questions were framed as follows:

The brand personality of Jack in the Box is:
 Unpleasant o o o o o o o Pleasant

Scoring was then transferred to a corresponding seven-point scale for data collection, with the highest point (seven) indicating the most favorable attitudinal response:

Unpleasant 1 2 3 4 5 6 7 Pleasant

For each respondent (who each rated a single restaurant), a score for each brand personality appeal factor was calculated by averaging the value of the characteristics associated with that factor.

Our research team then calculated the 90% confidence intervals for each brand personality appeal factor for each QSR brand. When viewing the graphs accompanying this study, we encourage readers to use the error bars to determine whether a QSR brand's ranking on a given brand personality appeal factor is within the margin of error of another QSR brand's ranking on the same factor. This is particularly important because of the relatively narrow range within which the various QSR's brand personality appeal factors sit.

An example will serve to illustrate the interpretation of the error bars.

Please refer to the Wingstop data point shown in Figure 2. Wingstop is the highest ranking QSR on the Clarity scale. This is the level of Wingstop's Clarity perceived by respondents who were at least somewhat familiar (familiarity = 5, 6, or 7) with the Wingstop brand. The error bars can be interpreted using the following statement: There is a 90% chance that the actual value of Wingstop's Brand Personality Clarity in the general population falls between 5.23 and 5.76.

Figures 2 through 4 each illustrate the comparative rankings of our study's 26 QSR brands on each of the three brand personality appeal factors. Note that the green-to-red color bars are provided solely as a visual aid to help the reader digest the distribution of rankings.

Figure 2

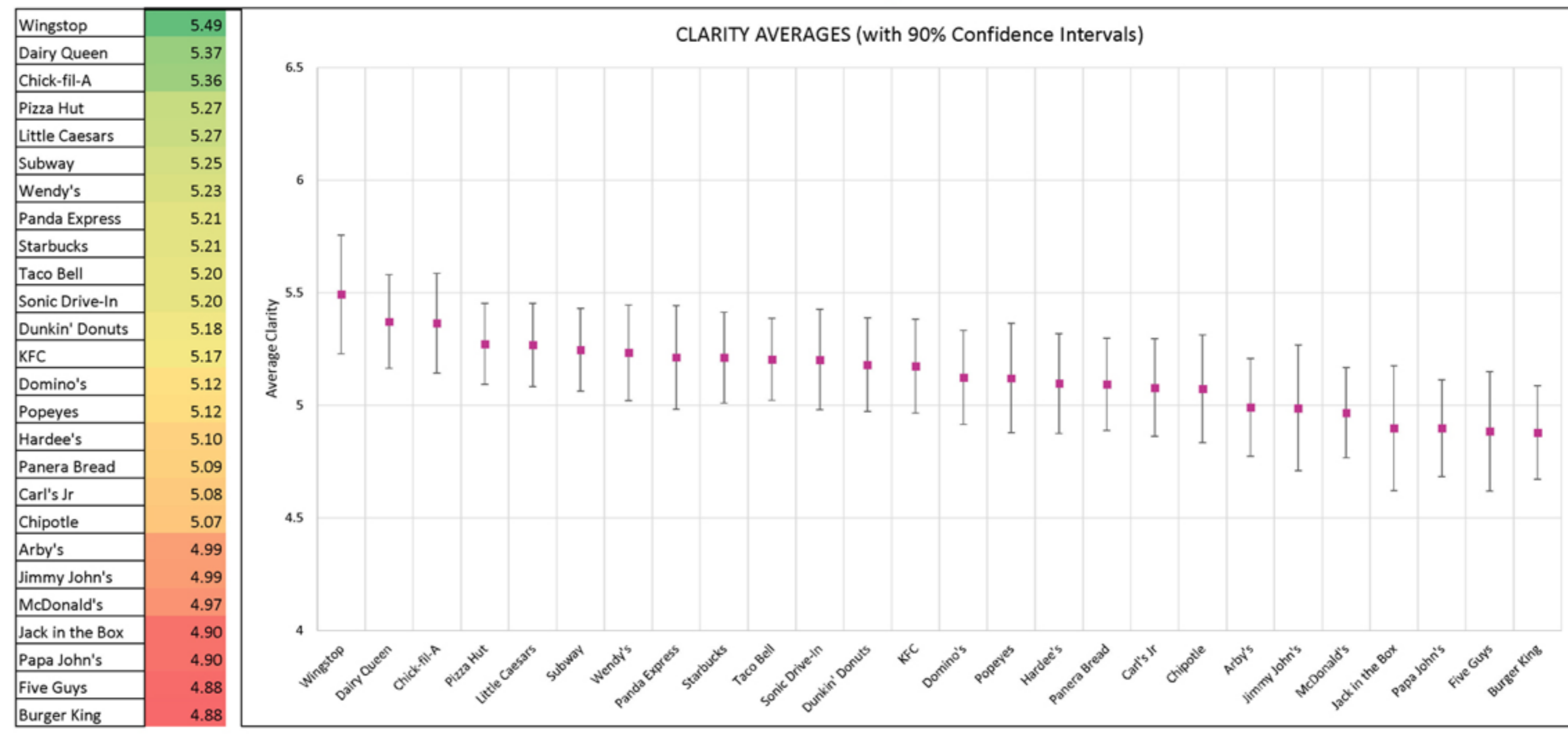


Figure 3

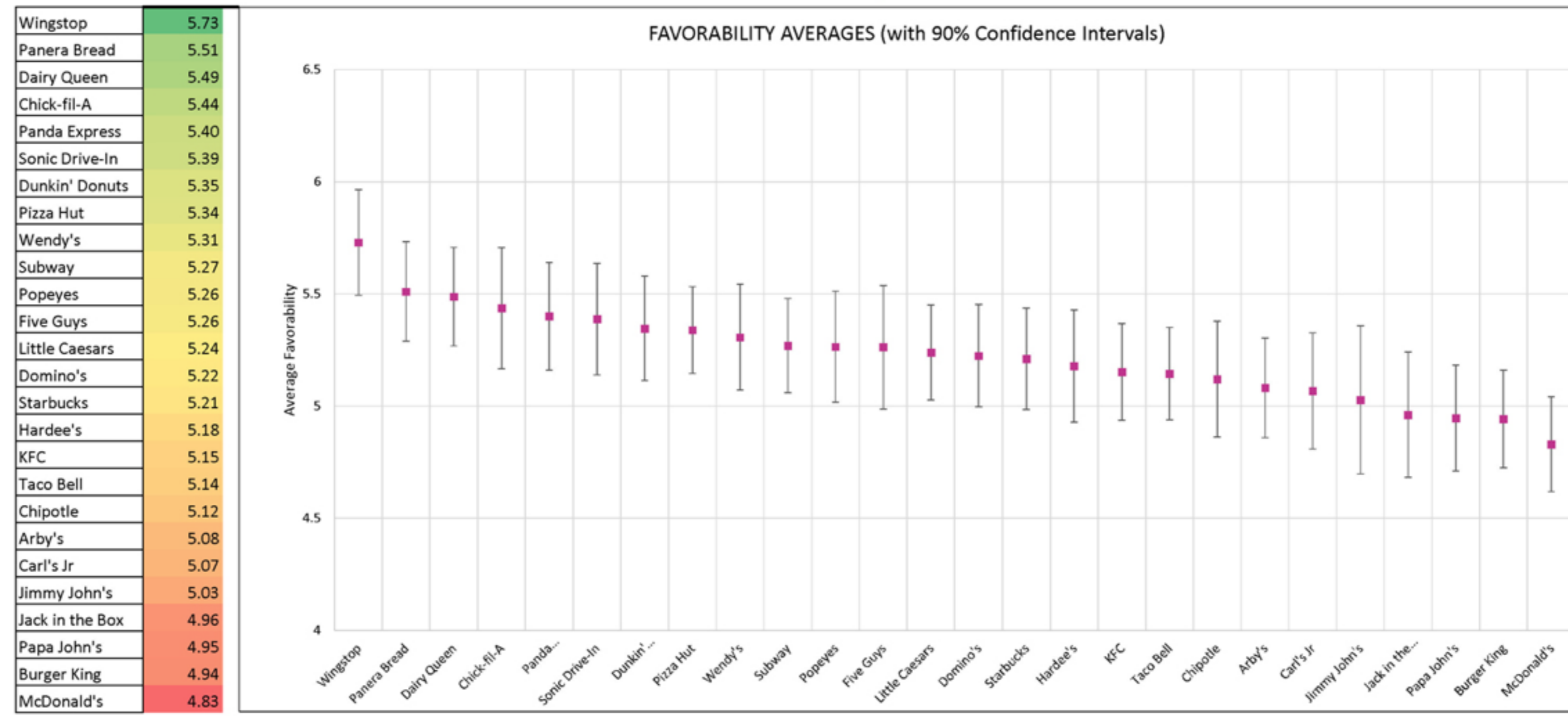
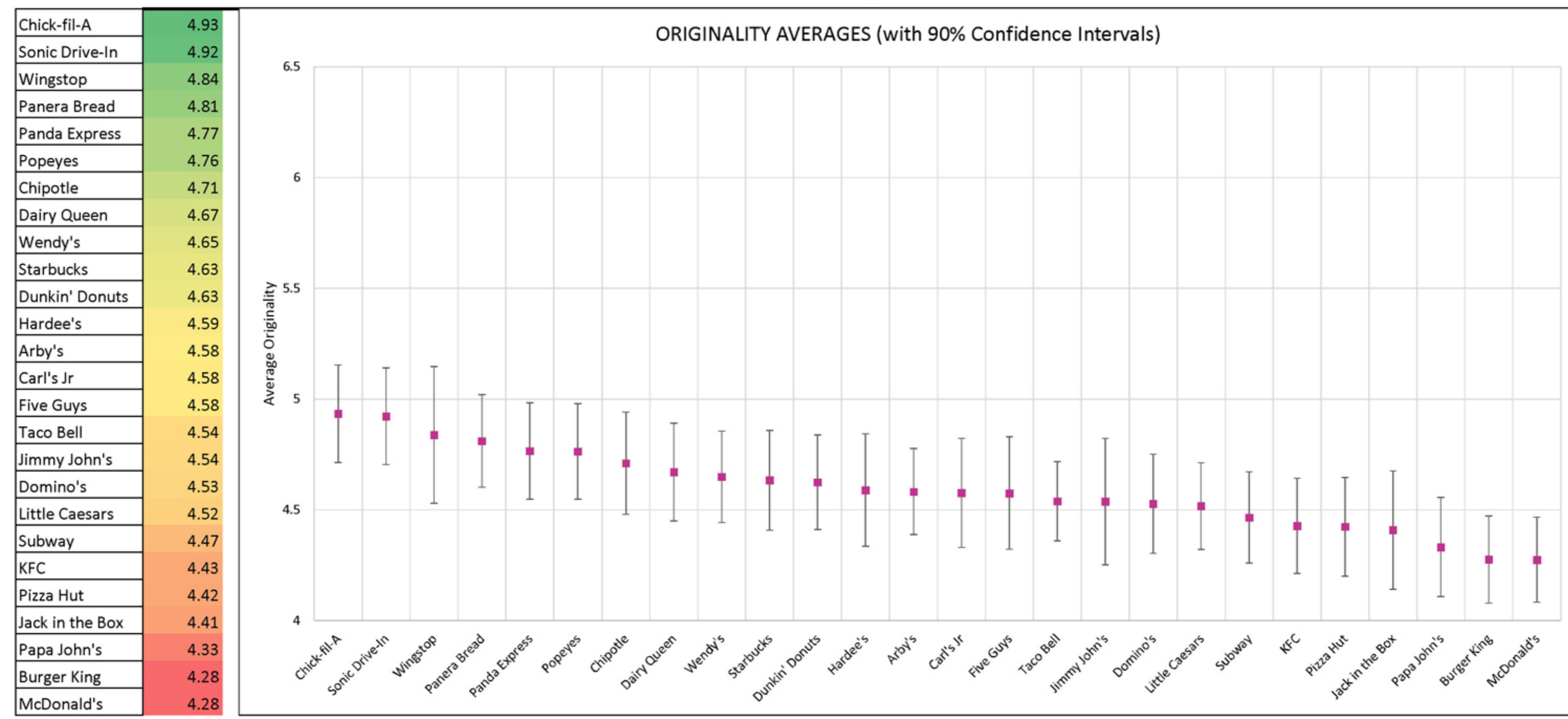


Figure 4



THINKING ABOUT THE DATA

The lowest ranking QSRs on Favorability include McDonald's, Burger King, Papa John's, Jack in the Box, and Jimmy John's, so these brands should be pleased that they've recently considered how and why they perform relatively low on the scale as compared with Wingstop, Panera Bread, Dairy Queen, Chick-fil-A, and Panda Express, which all perform higher.

However, while Favorability certainly can be seen as a summary measure of customers' perceptions of brand personality appeal, the factors of Originality and Clarity are also of dramatic importance, both in their own right and as drivers of Favorability; the Freling, Crosno, Henard (2011) work and a [Zion & Zion study demonstrate the positive impacts that Originality and Clarity can have on outcomes](#).

A restaurant ranking lowest on the Originality scale is disappearing into the background as offering an unimpressive experience or, worse, offering "the same old food." The lowest QSRs on the Originality scale—McDonald's, Burger King, Papa John's, Jack in the Box, and Pizza Hut—would be well advised to consider reinventing themselves in a way that will increase perceptions of Originality.

A high Clarity score indicates that a QSR's brand personality is well understood by consumers. The top brands in Clarity should be pleased that they've created a brand that consumers understand well. However, [as another Zion & Zion study shows](#), QSR brands should strive for both Clarity and Originality.

PUTTING THE DATA TO WORK

David Henard, one of the authors of the original Brand Personal Appeal framework wrote, "Until now, researchers have only been able to determine whether a company has a brand personality. What we've done here is develop a system that digs deeper to help companies link brand personality to concrete outcomes. For example, does the brand personality actually make people want to buy their product?"

Using the Brand Personality Appeal scales to take a definitive look at QSRs is eye opening. Our research team encourages restaurant chain marketers to carefully consider how their brands rank in Clarity, Favorability, and Originality. And as previously stated, the confidence interval error-bar bars that our research team has provided in the graph associated with each factor should make our data particularly meaningful to QSR marketers.

References:

[Freling, Crosno, and Henard \(August 2010\). "Brand Personality Appeal: Conceptualization and Empirical Validation." Journal of the Academy of Marketing Science, pp. 392-406](#)

[Aaker, Jennifer L. \(August 1997\). "Dimensions of Brand Personality." Journal of Marketing Research, Vol. XXIV, pp. 347-356](#)