



Brand Personalities of the Top 26 Quick Service Restaurants

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BACKGROUND

Many brands are searching for new ways to differentiate themselves and gain competitive advantage because of increased competition, the commoditization of many products and services, and generational behavioral shifts in loyalty. One opportunity for differentiation is to establish a specific brand personality so well-defined that consumers will choose (and stay loyal to) a brand even though other elements may resist differentiation (i.e., service, product selection, and price).

Brand personality has a long history among both academics and marketing practitioners, with hundreds of thousands of references in both academic literature and practitioner articles. A number of researchers have attempted to identify and codify the characteristics of brand personality, most notably behavioral psychologist Jennifer Aaker, Ph.D., in her landmark scale development paper, "Dimensions of Brand Personality" (Journal of Marketing Research, August 1997), which identified five distinct dimensions of which brand personality is comprised, and 42 specific adjective-based scales that can be used to measure brand personality.

While there has been debate over the years related to Aaker's framework, it remains widely accepted as the standard in brand personality measurement. Interestingly, while both academics and marketing practitioners acknowledge the importance of brand personality, most academic work focuses on scale development and theoretical applications, and little work has been conducted in applying brand personality measurement to competitive and industry analysis.

In this study, the Zion & Zion research team takes a deep dive into the application of brand personality to the 26 largest U.S. QSR (quick service restaurant) chains, making our team's research the most comprehensive published application of brand personality to date.

EXECUTIVE SUMMARY

The Zion & Zion research team sought to gain a deep understanding of the brand personalities of the 26 largest QSR (quick service restaurant) 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.

Chick-fil-A ranked highest (first out of the 26 QSRs) in three of the five brand personality dimensions (Sincerity, Excitement, and Competence) and second in another (Sophistication). Other brands that consistently ranked high in various dimensions were Sonic Drive-In (third in Sincerity and Excitement, and fourth in Competence) and Dairy Queen (second in Sincerity, seventh in Excitement, sixth in Competence, and fourth in Sophistication).

Some of the largest and most well-known brands displayed consistently less strength in personifying the same human characteristics, including Burger King (24th in Sincerity and 25th in Excitement, Competence, and Sophistication), Papa John's (26th in Sincerity, 24th in Excitement, and 21st in Competence), KFC (26th in Excitement, 21st in Competence, and 24th in Sophistication), and McDonald's (21st in Excitement and 26th in Sophistication).

QSR BRAND PERSONALITY

Aaker's original study created a now widely accepted framework for identifying and measuring human characteristics that are associated with a variety of brands across different industries. Aaker identified 42 specific human traits that can be segmented into five broad brand personality dimensions: Sincerity, Excitement, Competence, Sophistication, and Ruggedness. See Figure 1.

Figure 1

Sincerity	Excitement	Competence	Sophistication	Ruggedness
Down-to-earth	Daring	Reliable	Upper class	Outdoorsy
Family-oriented	Trending	hard working	Glamorous	Glamorous
Small-town	Exciting	Secure	Good looking	Good looking
Honest	Spirited	Intelligent	Charming	Tough
Sincere	Cool	Technical	Feminine	Rugged
Real	Young	Corporate	Smooth	
Wholesome	Imaginative	Successful		
Original	Unique	Leader		
Cheerful	Up-to-date	Confident		
Sentimental	Independent			
Friendly	Contemporary			

Employing Aaker's Brand Personality Dimensions, the Zion & Zion research team conducted an in-depth brand personality study of the nation's largest QSR restaurant chains. To accomplish this, a random sample of 4,363 consumers ages 18 and up from across the nation were surveyed, and each respondent was asked to evaluate a single restaurant on the brand personality 42 traits.

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 presented meaningful data, we only included responses from respondents 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 its 14,036 locations, to Wingstop at \$1.08 billion in revenue from its 1,037 locations.

Our research team chose to use a seven-point scale for brand personality as opposed to Aaker's five-point scale. For each of the 42 brand personality traits, respondents were asked to consider to what extent each restaurant could be described as possessing the trait. Respondents ranked each trait on a scale of 1 to 7, with 1 being "not at all descriptive" and 7 being "extremely descriptive." All questions in the survey and response options were randomized to control for any ordering effects or respondent fatigue.

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

Our research team then calculated the 90% confidence intervals for each brand personality dimension for each QSR brand. When viewing the graphs accompanying this study, one can use the error bars to determine whether a QSR brand's ranking on a given brand personality dimension is within the margin of error of another QSR brand's ranking on the same dimension. This is particularly important because of the relatively narrow range within which all QSR brands' ratings on a given personality dimension sit.

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

Refer to the Chick-fil-A data point shown in Figure 2. This is the level of Chick-fil-A's Sincerity perceived by respondents who were at least somewhat familiar with the Chick-fil-A brand. The error bars can be interpreted using the following statement: There is a 90% chance that the actual value of Chick-fil-A's sincerity in the general population falls between 4.9 and 5.3.

Figures 2 through 6 each illustrate the comparative rankings of our study's 26 QSR brands on each of the five brand personality dimensions. 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

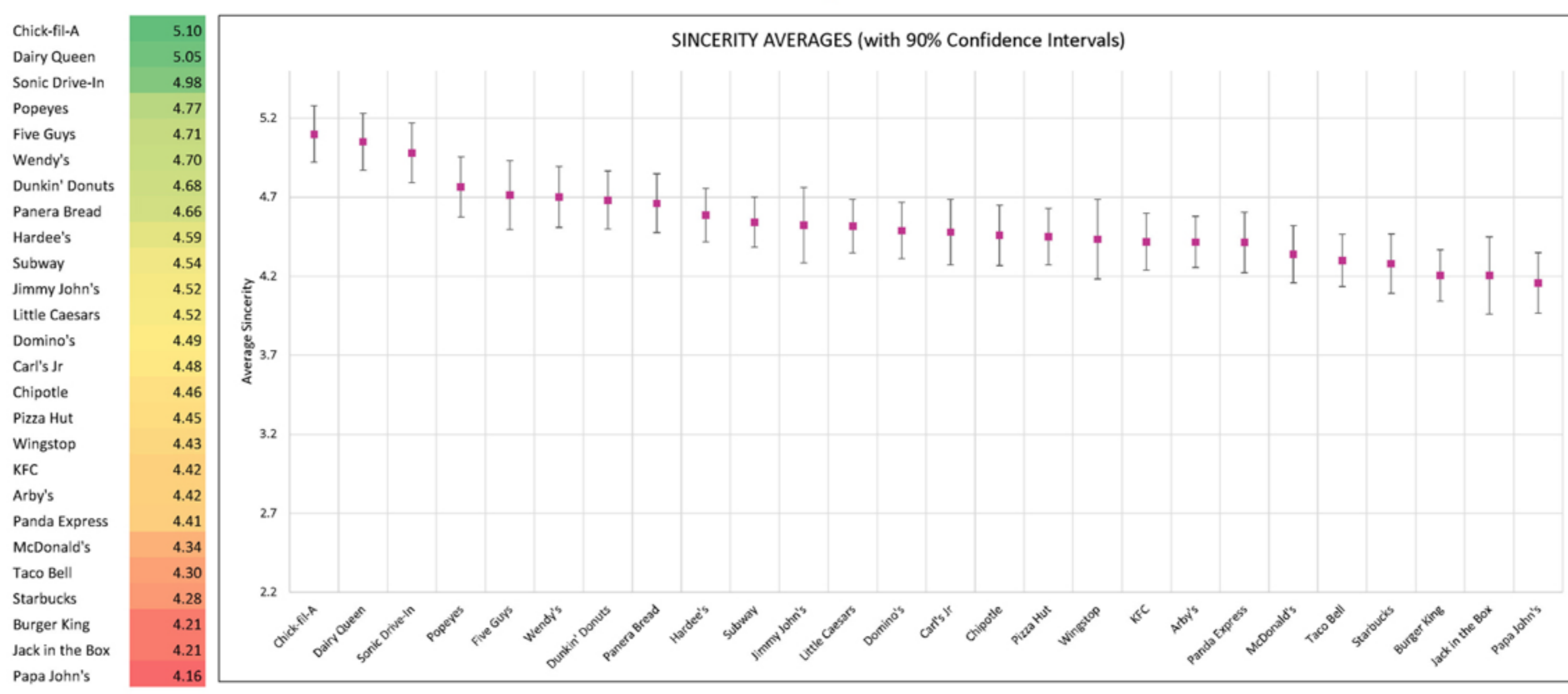


Figure 3

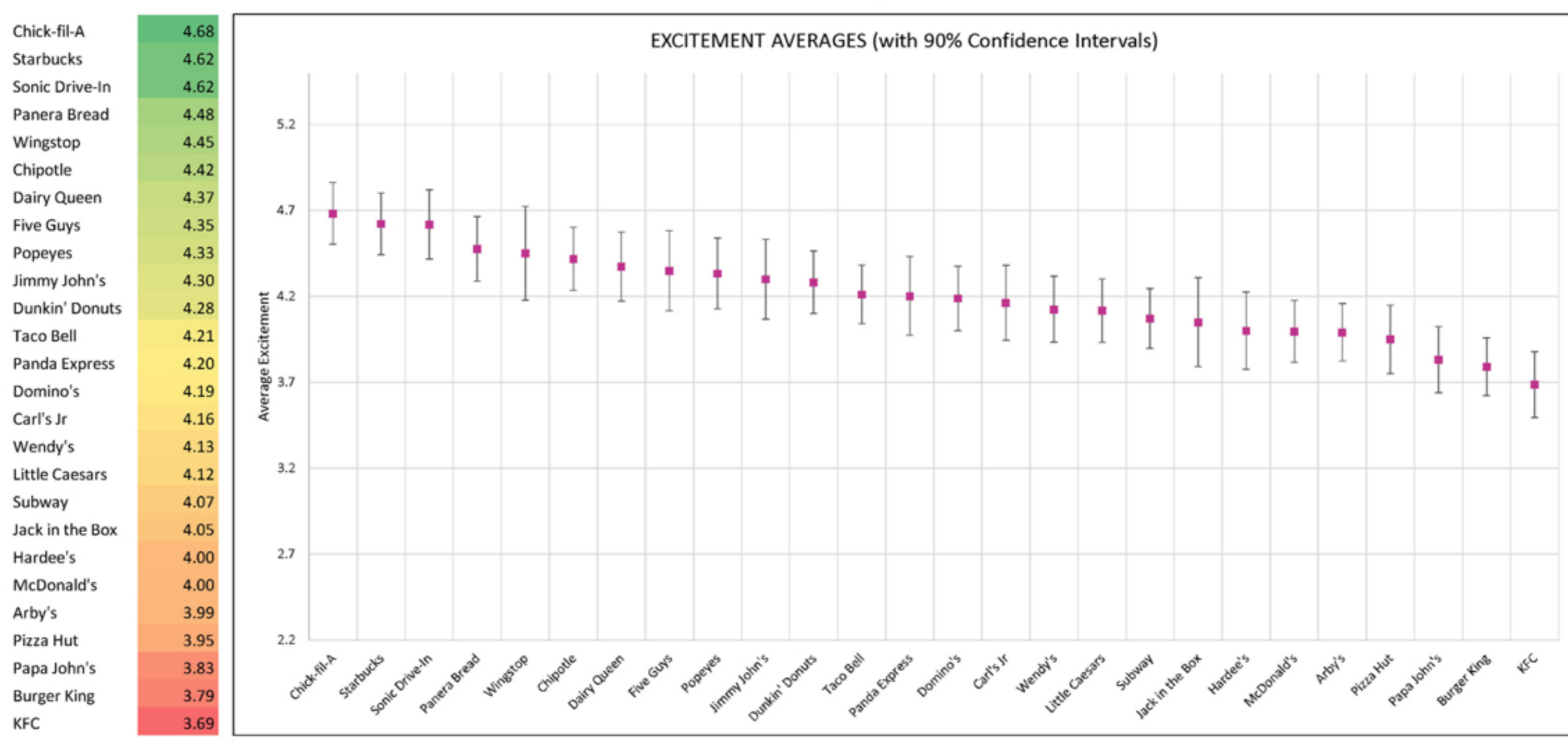


Figure 4

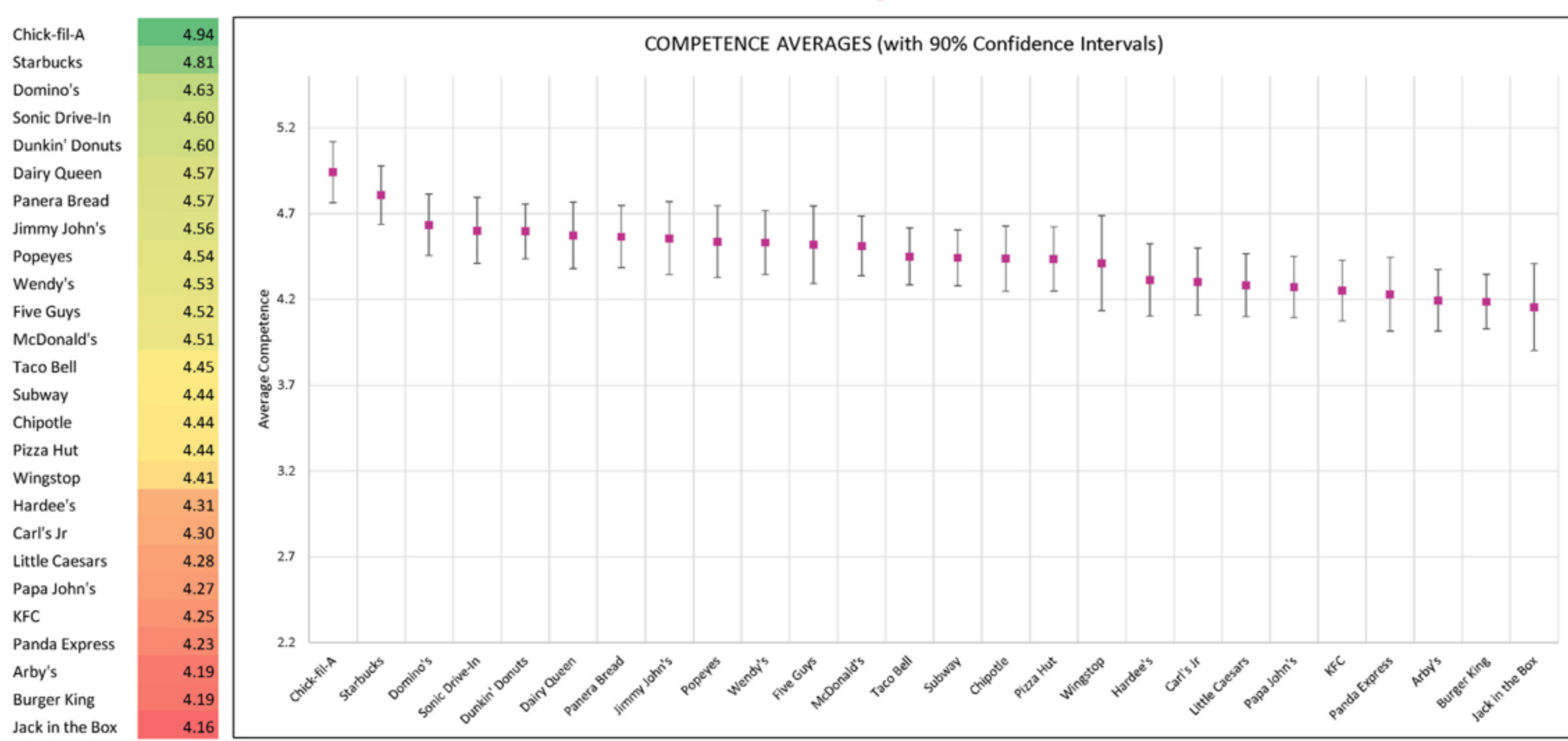


Figure 5

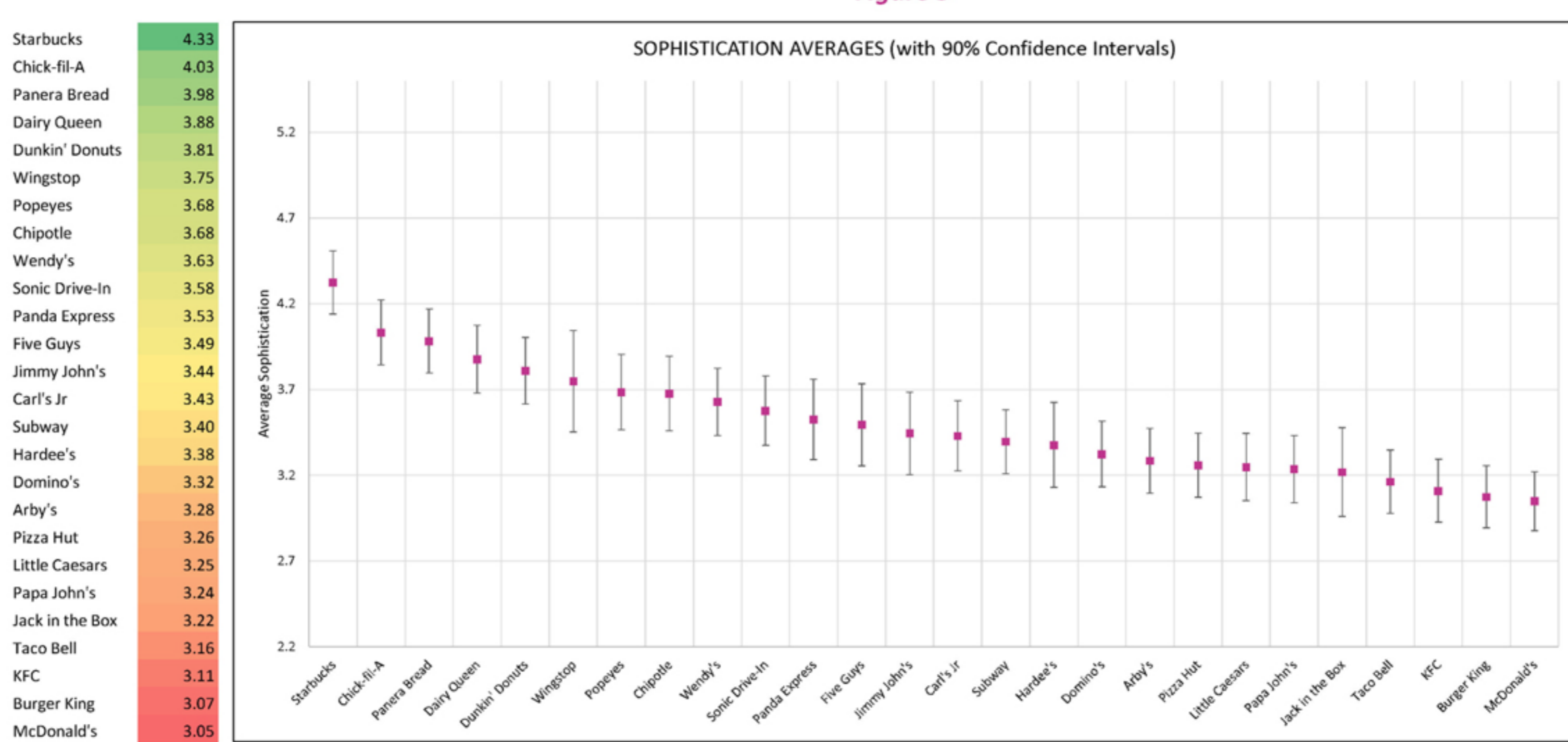
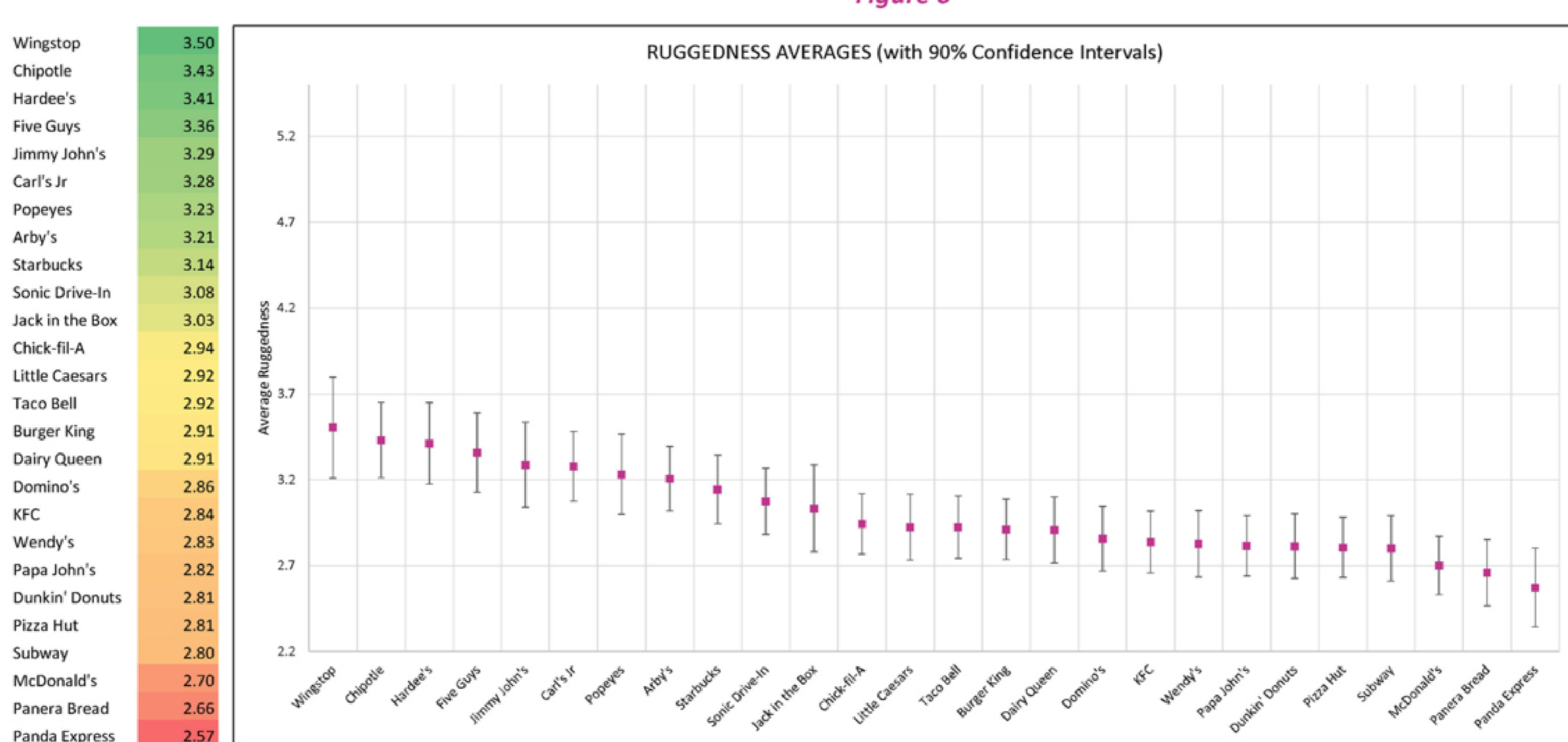


Figure 6



THINKING ABOUT THE DATA

We urge caution with being tempted to crown winners based on their brand personality rankings. The same goes for denigrating those that rank low on any particular dimension. The data is only a portrait of consumer perceptions—i.e., "what is" as opposed to "what's best."

For example, Starbucks leads the pack in Sophistication and McDonald's trails the pack. However, Starbucks may indeed wish consumers to perceive it as relatively sophisticated while McDonald's would not—although we suspect that McDonald's would not wish to be in last place.

When it comes to Sincerity, however, it is likely the case that being perceived as relatively less sincere is universally undesirable by all QSR brands. Brands such as Papa John's, Jack in the Box, and Burger King would be well advised to consider how they perform so low on the scale as compared with Chick-fil-A, Dairy Queen, and Sonic Drive-In, which are all statistically significantly higher performing (p<0.1).

Regarding Excitement, clearly many brands invest in cultivating an exciting image. Examples include Jack in the Box and Jimmy John's. However, these brands fall short of those at the top of the range, with the leader being Chick-fil-A with a 4.68 Excitement score, while Jimmy John's comes in at 4.30 and Jack in the Box 4.05, with the difference between Chick-fil-A and Jack in the Box being statistically significant at the p<0.1 level. Again, brands need to consider why this is the case and what they can do about it.

As for Ruggedness, whether a brand wishes to be perceived as rugged or not is clearly a positioning choice, and it is precarious to assert how a QSR brand's individual Ruggedness score can be declared good or bad. Instead, it can merely be declared as the degree to which it is true that consumers feel that Ruggedness applies to the brand in question.

A basic tenet of marketing is understanding your market and those who you want to attract and creating a congruent brand personality.

It is worthwhile noting that the five brand personality dimensions do not share equal strength for each restaurant. For example, the highest-ranking chain for Ruggedness (Wingstop, 3.50) is less than the lowest-ranking restaurant for Sincerity (Papa John's, 4.26), Excitement (KFC, 3.69), and Competence (Jack in the Box, 4.16). It is likely that the traits that comprise Ruggedness (i.e., outdoorsy, glamorous, good looking, tough, and rugged) are not as easily attributable to QSR restaurants than some of the other dimensions.

PUTTING THE DATA TO WORK

There is significant evidence and belief among both marketers and academics that brand personality is an important factor in achieving competitive advantage, and many QSR marketers clearly invest heavily in creating a distinct and strong brand image.

Our research team encourages QSR marketers to carefully consider where their respective brands sit on each of the five dimensions. The error-bar data that we have included allows for a QSR marketer's review of our data to be particularly meaningful from a competitive standpoint.

We also encourage marketers to consider not just their rankings but also the extent to which their respective brand personalities are differentiated by consumers. This is the subject of another research study.

References:

Aaker, Jennifer L. (August 1997). "Dimensions of Brand Personality." *Journal of Marketing Research*, Vol. XXXIV, pp. 347-356