

Burger Wars

TEACHING NOTES

The authors prepared this case solely as a basis for class discussion and not as an endorsement, a source of primary data, or an illustration of effective or ineffective management. Although based on real events and despite occasional references to actual companies, this case is fictitious and any resemblance to actual persons or entities is coincidental.

Teaching Plan

Theoretical Boundaries

The McWhopper case contributes to students' learning in the areas of corporate brand identity and of organizational reputation management. More specifically, the managerial dilemma relates to the sphere of cause-related marketing, providing an up-to-date scenario for analysis.

The learning objectives and method in the subsequent section are formulated with a particular body of knowledge in mind. Perspectives of cause-related marketing follow contemporary literature in the area; the guiding concepts on brand identity and reputation management draw on Urde and Greyser's (2014) Corporate Brand Identity & Reputation Matrix.

The paragraphs below lay out the theoretical frames and understanding that were involved in the writing of this case.

Cause Related Marketing

Cause-related marketing (CRM) is an increasingly growing tactic to balance business interests with corporate social responsibility. (Roper & Fill, 2012) It differs from sponsorship in that it is created around causes of ethical nature and involves the regular business model of the organization. (Fozia et al., 2015)

Customer views towards cause-related marketing are not uniform and depend heavily on market and context. One study, for example, finds that while in the US people with a social mind-frame tend to have more favorable views of CRM; such initiatives appeal more to self-minded individuals in China. (Wang, 2014) Perceptions of cause-marketing efforts, whether negative or positive, have a decisive impact on the purchase intentions of customers. If implemented successfully, the technique develops brand loyalty however; the risk that it generates skepticism instead also needs to be considered. (Fozia et al., 2015)

Attitudes towards cause-related markets are significantly shaped by personality type. (Wang, 2014) Kim and Johnson (2013) observe a difference in reaction between customers of an interdependent character and those who are rather independent. The former respond more to initiatives that alleviate guilt, while the latter is prompted rather by campaigns that stir pride. (Kim & Johnson, 2013)

The responsible intentions of an organization have a direct impact on brand equity, irrespective of the nature of the marketing approach employed. In their analysis of a charity event sponsorship, Woo-Young et al. (2015) find that the participants' perceptions about the event itself do not affect the brand esteem. However, awareness of cause-related marketing did, in turn, influence attitudes toward the sponsor.

On the other hand, companies that are viewed as socially-irresponsible are likely to arouse an adverse impulse in customers. Organizations that fall in the contra-CSR category attract considerably high “willingness-to-punish” as well as considerably low “willingness-to-reward” from their clients. (Sweetin et al., 2013)

Corporate Brand Identity and Reputation Management

The McDonald’s brand was unpacked for analysis using the Corporate Brand Identity and Reputation Matrix (Urde & Greyser, 2014). An illustration of the application is provided in Appendix 1. The case process is based on the relation between inside-out and outside-in perspectives, considering a number of elements within the Matrix from McDonald’s point-of-view in the particular situation described.

The class discussion will lead to a course of action covering three questions:

- a. What shall we respond?
- b. How shall we respond?
- c. Who shall respond?

Mapping out McDonald’s corporate brand over the CBIRM will provide a logical structure to the discussion ensuring that the solution covers the necessary bases. The Matrix components crucial for navigating through this case are Core Values; Positioning; and Relationship. The learning design takes a full view of the Reputation frame.

1. Core values

McDonald’s core promise is to “go beyond what they sell”. (McDonald’s, 2015) In other words, the brand stands for the care for food, customers, and the planet rather than the product itself. Indeed, McDonald’s tagline, “I’m lovin’ it” articulates this promise. In the very words of the corporation, McDonald’s is focused on “better food, more sustainable sourcing, happier people, a stronger community and a healthier planet”. (McDonald’s, 2015)

2. Positioning

McDonald’s market leadership in the fast-food industry is as much a state of fact as it is a strategic positioning exercise. Market leadership is integral to the company’s growth strategy. (McDonald’s, 2015) Roper and Fill argue in favour of a long-term view and recommend that the main purpose of positioning is for an organisation to be “authentic, transparent, consistent and credible”. (Roper & Fill, 2012)

3. Relationship

McDonald’s is presented as a forward-moving, up-to-date brand. This is reflected not least in its tangibles, particularly the changing menu items and the varieties with respect to the different local taste, habits and cultural traditions. Relationship-building and management are of clear fundamental value to McDonald’s, following a business strategy of sustainable growth.

4. Reputation

Being one of the biggest global brands widens the range of stakeholders for McDonald's, increasing the pressure on reputation management. As far as the McWhopper case is concerned, the key stakeholders in the scene are employees, customers, fan communities, and charities. Assessing the brand reputation through the CBIRM instrument, McDonald's is weakest in the elements of Trustworthiness, Credibility, Responsibility, and Willingness-to-Support.

Case Synopsis

In late August 2015, Burger King published an official proposal to McDonalds, suggesting that they end the so-called "burger war" for one special day, World Peace Day on September 21. McDonald's and Burger King have a long history of rivalry and the expression "the burger war" was founded in the late 1970's (Gustin, 2015). The competition intensified when Burger King launched an advertising campaign directly targeting McDonald's, and comparing the companies' products.

The proposal Burger King published in 2015 included a full page advertisement in newspapers such as the New York Times and the Chicago Tribune. Burger King stated that they were aware of the fact that the companies had differences in the past, but that they for one day should call a ceasefire in the burger war. The proposal was made in collaboration with "Peace One Day", a non-profit organisation campaigning to raise awareness on the United Nations World Day of Peace and create global unity.

Burger King's suggestion was that the two companies create together the "McWhopper", a combination between their two flagship burgers - the Big Mac and the Whopper. Furthermore, the suggestion was to cook and serve the burger together, in one location and for one day only - the World Peace Day.

Apart from the newspaper advertisement, Burger King created a web page to support their proposal and to give McDonald's a better understanding of their proposal and how it should be carried out. The dedicated web page features a video explaining everything in detail. Burger King ends the proposal saying that they look forward to hearing from McDonald's and that they naturally will only proceed if they are on board.

The decision made by McDonald's was to turn down Burger King's proposal. They did so on Facebook saying that they liked the idea but that the two companies could do something bigger together to make a difference.

Learning Objectives

The class discussion will focus on brand identity and reputation as a basis for decision-making. The objective is to assess the strategic worth of cause-related marketing options, considering the direction provided by the corporation's core

values in balance with the effects of the decision on the brand perception. The learning design intends to help students:

- Understand the strategic link between reputation management with business plan;
- Identify and differentiate between the various elements in the case scenario: competitiveness, positioning, stakeholder management and brand identity;
- Evaluate the risks and benefits of cause-related marketing within short- and long-term views;
- Examine possibilities with contrasting opportunities and threats, and decide on a course of action;
- Develop a coherent communications plan that covers a multiplicity of facets: timing, brand identity, social sensibility, and corporate strategy.

Process

The session is divided into three parts:

- a. Introduction: familiarization with case circumstances;
- b. Deliberation: discussion of main managerial dilemma;
- c. Comparison: presentation of action taken in real-life situation.

The deliberation stage provides the main learning opportunity. The following is a step-by-step description of the learning process, intended for the Case Leader.

A. Introduction

The participants are immediately given the role of managers at McDonald's and exposed to Burger King's 'Open Letter'. This will put the students in a situation similar to the one in real-life when McDonald's managers were faced with the unexpected newspaper advertisement one morning.

After that, the audience is provided with a brief presentation of McDonald's in order for them to understand the organisation and its core values. This will provide enough information for the participants to understand and be able to analyze the situation. They will also be briefed on the relationship between McDonald's and Burger King up until the present situation, focusing especially on the history of the Burger War.

Next the video proposal from Burger King will be shown, offering a better understanding of the initiative and allowing the audience to form an opinion before the discussion.

B. Deliberation

With the relevant background information in mind, participants will be able to tackle the situation, drawing on their theoretical knowledge. The Case Leader will

facilitate the connection between the shared insights and the learning objectives. In the position of brand managers, students shall discuss the Case with reference to the opening question:

“How should McDonald's respond to Burger King's proposal?”

During the discussion, the Leader will both guide the flow and chart out the comments (explained in the Board Plan below). A set of leading questions and sideways remarks are provided below. Leading questions are introduced, where necessary to keep the discussion on course. Sideways remarks offer a contrasting view if the general opinion tends to one side or the other.

Leading Questions

1. Do we accept the proposal?
2. How will saying yes or no influence McDonald's reputation?
 - How could the decision impact the brand?
 - Consider different stakeholders
3. How do we reply?
 - What is our communication plan?
 - Where do we reply?
 - Do we reply publically?
4. Who will reply?
 - Who is responsible for communicating our answer?

Sideways Remarks

1. Countering the Nay-sayers:
 - It is not unusual of McDonald's to sell limited edition products. (Taylor, 2015)
 - McDonald's sales were down 2% in the US, falling for the seventh quarter in a row. Global sales also fell 0.7% in the second quarter of 2015. Burger King's revenues, on the other hand, grew by 2.6% in one year, while sales were up by 6.7% overall. (Duprey, 2015) Burger King has only just reclaimed the runner-up position, but McDonald's is still in decline. (Fedde, 2015)
 - The very day before the advert came out, McDonald's was supporting a RMCH Conference, (McDonald's, 2015) an international social responsibility meeting. This was never communicated through the day.
2. Countering the Yay-Sayers:
 - The combination burger highlights the Whopper's strengths, as the circumference of Burger King's burger is larger than the Big Mac. (Taylor, 2015)
 - McDonald's current strategy seems to be develop into more of a fast-casual diner, offering a healthier menu over hamburgers. (Duprey, 2015)

- It is not in McDonald’s tradition to join forces with Burger King. Corporation founder, Ray Kroc, once said of Burger King, “If they were drowning to death, I’d put the hose in their mouth.” (Fedde, 2015)
- In 2012 KFC drew sharp criticism for “pink-washing” by rolling out a campaign that donated to a breast cancer charity with every purchase of a special menu item. (McVeigh, 2012)
- In March this year, McDonald’s launched an international 24-hour campaign, with fun activities in different cities intended to spread joy around the world. The company received a backlash from the public that bemoaned the working conditions of its own employees. (Summers, 2015)
- Nothing was said in the proposal about expenses, funds but The Telegraph reports that all proceeds would go to Peace One Day. (Davidson, 2015)
- While more than nine in every ten of Americans identify with a particular, less than four of them make a purchase solely because it is associated with a cause. (Renando)

The leader ends the discussion and recaps the main points, observations and outcomes. A vote is then initiated on the principal facet of disagreement.

C. Comparison

McDonald’s solution is presented to the audience at this stage, mentioning the major contrasts with the conclusions of the discussion. The second round of exchange is opened, allowing the participants to make reactions and reflections.

Board Plan

During the discussion, the participants’ comments shall be written on the board, organised according to the grid presented below. At the end of the discussion, the grid will give an overview of the main opinions and their developments.

The grid considers the three alternative responses to the Opening Question and classifies the comments as either benefits or risks in terms of these.

<i>Alternative Responses</i>	Pros	Cons
<i>Yes</i>		
<i>No</i>		
<i>Do nothing</i>		

Table 3: Answers Grid

Time Plan

The structure and method have been planned for a session of forty-five minutes. Below is a run-through with a five-minute breather.

CASE DISCUSSION (45 MIN)	
Introduction (10 minutes)	
5 min	Open Letter & Brief Background
2 min	Relationship between McD & BK
2 min	Video
Deliberation (20 minutes)	
15 min	Discussion (Guidance & Board Notes)
5 min	Recap & Vote
Comparison (10 minutes)	
3 min	Describe course taken and reception
5 min	Reaction to real-life solution
2 min	Sum Up & Conclusion
END	

Table 4: Time Plan

Reflection

Before Class Presentation

During the course “BUSN35 Corporate Brand Management and Reputation”, we have been presented with numerous case studies. When writing the Burger War case, we were put on the other side of the room, prompting us to think about a logical process connecting theory to practice. Selecting, researching and evaluating a real-life managerial problem helped us to sharpen our understanding of the main course themes, namely, corporate brand identity and strategic reputation management.

The main challenge of switching roles with the teacher was gathering the necessary information around the case to be able to present the full significance of the Burger King's proposal. A second issue was finding ways to help participants look at the situation through the perspective of McDonald's without losing touch with the core theoretical inquiry.

After having discussed different options, we agreed that the McWhopper situation was the most intriguing. The situation it presents is straightforward and easy enough to get across, yet it gives rise to a complex dilemma with many angles for consideration. We believe that students can easily relate to the brands in question and the competitive relationship between them, helping to create a richer discussion environment. The fact that the case is very recent makes it more relevant to the participants, especially if they are already familiar with it. Furthermore, cause-related marketing is an increasingly important field, and the scenario will provide a useful illustration to future brand managers.

Concepts that were introduced during the course led us to frame the situation as an identity-reputation problem. We quickly agreed that the CBIRM approach was an appropriate instrument when analyzing the dilemma and constructing the session. At the same time, the case spurred us to explore more deeply the area of cause-related marketing, an understanding of which is central to the McWhopper scenario.

Before starting preparations for the class presentation, we discussed the case dilemma between ourselves. We observed that our visions and assessments developed as more factors and implications were considered. We were, at first, surprised at McDonald's anti-climactic reply to Burger King's proposal. However, as the case-building progressed, we acknowledged that there was no obvious move to make.

We feel that this case adequately reflects the risk of acting on impulse without evaluating enough options and possibilities. Another learning point is that certain situations may lead organisations to strategically decide against their core values. In our opinion, McDonald's refusal to entertain Burger King's invitation contrasts with the values encapsulated by the brand promise: "I'm lovin' it".

The change of perspectives within the team makes us aware that participants in class might also head into a one-track discussion and dismissing alternative possibilities outright. The leading questions and sideways remarks explained in the Teaching Notes section reflect this concern, as we planned for ways to stimulate discussion. We will consider the discussion successful if we manage to lead the class through a multiplicity of perspectives, ideas and opinions.

Preparing the Burger War case has definitely been a rewarding experience and an enjoyable one too. It was a new way of writing requiring a different mindset from academic papers. The method helped us go full circle from examining a real-life dilemma, filtering it through theoretical paradigms, and reconstructing it for practical application again.

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Appendix

Exhibit 1 Corporate Brand Identity & Reputation Matrix (Urde & Greyser, 2014)

For the purposes of this written paper we use the Corporate Brand Identity and Reputation Matrix (CBIRM) as a model. It summarizes the main points from the traditional corporate brand identity matrix and adds the outer circle for the reputation. Below, we attach the compilation along with its application to McDonald's corporation.

Relevance		Trustworthiness		Differentiation
	Value proposition <i>Quality food served quickly, Consistently across the globe</i>	Relationships <i>Employees, Customers, Suppliers, The Government, Trade unions, Communities</i>	Position <i>Market leader, Sustainable growth, Innovation</i>	
Recognisability	Expression <i>Logo, Golden Arches, Ronald McDonald, Slogan, Jingle</i>	IDENTITY Brand core - promise and core values <i>Good Food, Good People, Good Neighbor</i>	Personality <i>Loving, Caring, Casual, Fun</i>	Credibility
	Mission and Vision <i>To be our customers' favorite place and way to eat & drink</i>	Culture <i>People-centricity, Individual learning, Organizational learning, Diversity and inclusion</i>	Competence <i>Convenient service, fast food at competitive prices</i>	
Willingness-to-support		Responsibility		Performance