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Jollibee Brand Insight Analysis and Implications

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Abstract:
The current global fast-food industry is highly competitive. Multinational catering brands need to balance localization and globalization in order to achieve breakthroughs. J The Philippine brand Jollibee has grown from a local brand to a global giant, so its marketing model is worth studying. This study focuses on Jollibee's marketing strategies. Using reference materials and brand cases, it uses the case analysis method to systematically analyze its key actions in product, price, place, promotion, and summarizes the marketing achievements and shortcomings. The study found that Jollibee successfully established a presence in 33 countries and regions by relying on classic products, local adaptation, affordable pricing, gradient channels, and emotional promotion. The customer retention rate increased from 28% to 40%, However, it still has problems such as slow transformation to healthy food and poor management of multiple brands. In conclusion, Jollibee's core strengths are local adaptation and emotional marketing. It needs to improve its healthy products and channel construction. Its experience can provide references for similar international food brands.

Keywords: Jollibee; Marketing strategy; Emotional marketing; Local adaptation; Restaurant expansion

1. Introduction

Jollibee (Happy Bee) is a brand founded by Chinese-Filipino Tony Tan Caktiong in 1978. It started as an ice cream store and later transformed into a fast-food establishment. Its most popular products include crispy fried chicken and sweet spaghetti. Due to its tastes are very suitable for the Asian local customers, it has beaten McDonald's in the local market and become a national brand loved by most Filipinos [1]. Currently the brand's store network has expanded to 33 countries and regions, with approximately 10,000 stores worldwide. It earned 4.4 billion US dollars in 2023, and its brand value reached 2.5 billion US dollars in 2025. It is one of the leading brands in Asia's catering industry in terms of store number, brand value and influence [1,2].

The group owns several brands covering various categories such as Western fast-food, Chinese fast-food, pizza and French baking, including: Jollibee: fried chicken and sweet spaghetti as main products, Chowking, Greenwich: pizza and pasta, French Baker: French bread and coffee, Yonghe King, Tim Ho Wan: Chinese fast-food and Hong Kong-style dim

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sum.

It is centered around the core concepts of "happiness, family gatherings, and simple deliciousness", and pays special attention to family atmosphere. With these features and global expansion, it has become a world-famous catering brand [1]. Compared with big global fast-food companies like McDonald's and KFC, its overall scale still has a significant gap, but it has a faster growth rate. It performs very well in the Philippines and some emerging markets such as Vietnam, Indonesia and Thailand. It dominates McDonald's in the Philippines, Southeast Asia, and the Filipino diaspora areas in North America, and is the only fast-food brand that can defeat McDonald's head-on in its home market [3].

Jollibee has grown to its current scale in the highly competitive restaurant industry. It must have its own unique competitive advantages. This study attempts to conduct a systematic analysis of the development strategies of this brand, and on this basis, summarize the main characteristics of its marketing model, and form certain conclusions, these conclusions can also provide development inspiration for those who follow in this industry.

2. Core Analysis of Jollibee's Marketing Strategies

2.1 The 4P Marketing Framework

First, we use the 4P marketing theory to make a comprehensive analysis of Jollibee. The 4P framework helps us understand the company's marketing strategies clearly.

2.1.1 Product: Keep Classics Design, Adapt to Local Tastes, and Create New Elements

Jollibee's success in the global market is largely attributed to its product strategy, which is undoubtedly the key to the key. It keeps the taste of its core products to make people remember the brand, and also changes products to fit different local markets [1]. Its signature crispy fried chicken is the most important product. The signature crispy fried chicken is its "ace" product. Whether in the Philippines, the United States, or China. the recipe and the current frying process have remained largely unchanged. No matter where customers are, they can feel the familiar flavor. Besides fried chicken, mango pie and Filipino rice noodles also keep their original tastes. These unique flavors have become Jollibee's distinctive brand memory points, allowing consumers to recall these iconic delicacies whenever they mention it [1].

Jollibee is not rigid. It changes menus for local eating habits: it sells spicy chicken in Vietnam where people love spicy food; it provides adobo rice for Filipino immigrants in the US to remind them of hometown, and also lets local people try special Filipino flavors; it makes small and easy-to-carry food(with small size and convenient packaging for busy office workers in Japan [4]. it adds soy sauce fried chicken, soybean milk, fried dough sticks and other Chinese breakfast-foods in China to fit Chinese eating habits, to make consumers feel "This is a brand that understands us"; it launches whole-wheat hamburgers in Europe to meet local people's healthy consumption trend [1].

Jollibee has a rapid pace of introducing new products, which helps maintain market vitality, about one new product every 1.5 months. It collects customers' opinions and adjusts or stops unpopular products in time [5]. In recent years, as customers care more about health, Jollibee has added grilled chicken, salads, low-sugar drinks and other light food. Now these healthy foods make up 23% of its menu, which follows market trends and also encourages more health-conscious consumers to visit the stores [1].

2.1.2 Price: Low Price and Flexible Adjustment

Jollibee uses a different price strategy to avoid direct competition with international food brands. Most of its products are 10%–15% cheaper than those of McDonald's and KFC. Both ordinary Filipino families and working-class people in Southeast Asia can afford them, while McDonald's and KFC are still expensive for local families in some Southeast Asian countries and are more of an occasional luxury.

Its pricing strategy is flexible and does not adopt a one-size-fits-all approach. Instead, it will make adjustments based on the consumption capacity and habits of different regions, truly achieving "tailoring to local conditions" and matching the local national conditions: in Southeast Asia, one product only costs 1%–2% of a person's monthly income, so almost everyone can afford it; in Europe and America, it sells "fried chicken + drink + snack" sets that are more than 20% cheaper than buying separately; in China, a weekday meal costs about 25 RMB, and a family set costs 50–80 RMB. It also offers many discount coupons and encourages people to eat during non-busy hours to increase store traffic and make customers feel cost-effective. This pricing method helps Jollibee stand firm in different markets and attract many customers even when facing local brand competition.

2.1.3 Place: Find an Acquaintance, Then Expand Steadily, effectively Avoid Risk.

Jollibee uses a safe way to expand overseas and does not enter strange markets blindly. It has a smart "approach to breaking through" - it starts by seeking "acquaintances" to open the way, and then gradually expand. The "acquaintances" are more than 10 million Filipinos living abroad [3,5]. For example, it opens stores in California, the US and Dubai, the Middle East first, and attracts Filipino immigrants with hometown tastes to form a stable early customer base. These immigrants feel strong emotional connection with the familiar food and will recommend the brand to people around them, which helps Jollibee enter the local market easily [4]. Then, it gradually expands to the surrounding core shopping districts and communities, gradually penetrating the mainstream market [1].

In overseas markets, Jollibee also works with local partners. Local people run daily operations, while it only provides standard management and product recipes. This not only reduces costs and risks, and also helps the brand fit into local life quickly. This "first find familiar partners to break through, dense offline layout, comprehensive online coverage, local win-win cooperation" channel strategy helps Jollibee expand steadily and open more than 5,800 stores in 33 countries and regions around the world [5].

2.1.4 Promotion: Tell Good Stories, Arouse Empathy, and Adapt to Local Culture.

One of Jollibee's important marketing strategies is to promote the brand through storytelling and tell real-life stories. The #KwentongJollibee series of advertisements have no fancy special effects or celebrity spokespersons. They only show daily scenes such as family reunion, young love and neighborhood help. Although the production style is relatively simple, the content has a strong sense of real-life context, making it easy to evoke a sense of identification and leaving a deep impression [6,7]. For example, one advertisement tells a story of young people working outside going home for the Spring Festival and eating Jollibee with their families. The simple dialogues and warm pictures make many people away from home feel the same. A study surveyed 385 people who watched these ads, and most of them said the content is close to life, so they are willing to share and interact [7].

Jollibee uses different promotion focuses in different countries: in the US, the emphasis is on "immigrant families integrating into the local community, telling the story of immigrant families gradually integrating into local life by sharing Jollibee's delicious food, making many immigrants feel a sense of belonging"; in China, it emphasizes family reunion during traditional festivals, such as the Spring Festival and Mid-Autumn Festival. launches promotion activities related to family gatherings, which aligns with the traditional Chinese value of attaching importance to the family; in Japan, the focus is on "small joys of office workers", telling the story of office workers relaxing their minds by having a Jollibee meal during their busy work breaks, which is close to the lifestyle of local office workers. On social media, it uses exaggerated words like “always delicious” to describe food, which is simple and impressive [8].

Besides, it often starts online challenges to encourage users to share their moments of eating Jollibee. For example, the #JoyOfTaste challenge has been watched more than 1.2 billion times online and attracts many young people. Moreover, both young people and elders enjoy its advertisements. People of different age groups have similar levels of recognition for it, which has expanded its brand influence. Gradually, which helps Jollibee become a world-famous brand from a local Filipino brand [1].

2.2 Multi-brand Cooperation and Digital Support

Jollibee buys many catering brands to expand its business, such as Chinese fast-food brand Yonghe King, high-end dim sum brand Tim Ho Wan, American burger brand Smashburger and The Coffee Bean & Tea Leaf. These brands serve different groups of customers: families can choose Jollibee fried chicken sets, young people can eat Smashburger hamburgers, office workers can drink coffee at The Coffee Bean & Tea Leaf, and customers who want Chinese breakfast or dim sum can go to Yonghe King or Tim Ho Wan [1]. These bought brands can expand faster with Jollibee’s global channels, and Jollibee also makes up for its product shortages. The brands help each other grow in supply chain, resources and channels.

In terms of digitalization, its app uses data analysis to recommend food according to customers’ habits, such as sending Yonghe King breakfast coupons to people who like Chinese breakfast and Smashburger discounts to hamburger lovers. Because of this, member repurchase rate increased by 27% [1]. In the Philippines, its social media accounts have twice as many followers as other brands. It posts interesting food videos and online activities through entertainment channels to keep high popularity, such as sharing the process of new product production and launching food broadcasting challenges and make people always remember this happy brand [1].

2.3 Achievements and Problems of the Company (SWOT Analysis)

Jollibee’s development is not perfect. Next, we use SWOT analysis to understand it better.

2.3.1 Strength

From Local Leader to Global Brand, the brand's influence has been continuously increasing. The overall development trend shows a stable growth pattern In the Philippines, Jollibee has beaten McDonald’s and taken about 50% of the chicken and hamburger market. 78% of customers think it is very suitable for family meals, and 64% like its dining environment. It has become a cultural symbol in local people’s life [1,9].

It has also expanded successfully around the world, covering 33 countries and regions with more than 5,800 stores [5]. In the US, half of the customers of its 500 stores are

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not Filipinos [3,5]; in Vietnam, more than 50% of customers are local people, making it a good example of expansion in Southeast Asia [1]; even in China's highly competitive market, it has opened 407 stores and once achieved a 48% sales growth in a single quarter [10].

Its brand influence and financial performance are getting better. In 2025, it won the "Company of the Year" award and became one of the top five global brand strength. Its brand value reached 2.5 billion US dollars, an increase of 8% from the previous year. Emotional marketing and digital strategies have achieved obvious results. Global digital orders rose from 47% in 2023 to 68% in 2025. Its revenue increased by 14.6% in 2025, operating income increased by 17.6%, and dividends exceeded pre-pandemic levels [1,2]. The company has formed a relatively stable development foundation and possesses strong risk response capabilities. The development foundation and risk resistance level are high, and the future development space is still huge.

Jollibee has also made great efforts in corporate social responsibility (CSR), including the Farmers' Entrepreneurship Program (FEP), which utilizes methods such as helping farmer communities establish cooperatives to utilize their resources, teaching them marketing skills, and improving farmers' business judgment; The ACE project provides scholarships for technical and vocational skills training institutions to support impoverished youth; The BLT school feeding program, aimed at preventing students from dropping out due to hunger and food insecurity, has served over 240000 students since its launch in 2007. [11]. These actions are well-known and respected, no longer an "additional burden" and have become a core strategy for the company's long-term competitive development.

2.3.2 Weaknesses

The challenges of expansion are still ahead. First, there are taste and health problems. Core products like sweet spaghetti are not popular in Europe and America. Many Western people think they are too sweet. The number of complaints related to "healthy diet" in the North American market has increased by 20% in 2025. Although Jollibee has launched healthy products, they are not many and not well-promoted. People still think its food is high in calories [1,2].

Second, there are problems in multi-brand management. Some bought brands are losing their own features, being "diluted".

Third, Jollibee relies too much on third-party platforms. 73% of its overseas online orders come from these platforms, which charge 15%–20% commission and reduce profits. Although it guides customers to order through its own app, only 25% of online orders are from its official channel's food delivery in 2025 [1,2].

2.3.3 Opportunities

The market environment offers numerous growth opportunities.

Globalization and digital development help Jollibee. AI algorithms and big data can improve personalized marketing and enhance user conversion efficiency.

Emerging markets have strong demand. The rapid development of cities and the rise of middle class in Southeast Asia, the Middle East and other regions bring more fast-food consumption and large expansion space [3].

Healthy consumption trends bring product innovation chances. Jollibee can attract new customers by making more low-oil and low-sugar products and promoting healthy ideas [10].

There are many chances to buy good brands. Jollibee can quickly make up product shortages by buying excellent small brands in different markets which are numerous high-quality brands in the global catering market that are segmented into various niches [1].

The diaspora economy continues to grow. More than 10 million Filipinos living abroad provide natural first customers and the path of word-of-mouth communication can reduce the cost of penetrating the mainstream market [3].

2.3.4 Threats

External challenges intensify marketing pressure. The competition among multinational brands is fierce. Major companies like McDonald's and KFC have well-established global operations, which will squeeze out market share. The challenges for enterprises to further expand become greater [1].

The risk of cost fluctuations is significant. The rise of food prices, exchange rates and interest rates affects marketing budgets. Its high debt-to-equity ratio (2.43, classified as the "very high" level) further limits its adjustment ability [2].

The trend of healthy consumption is forcing the industry to undergo transformation. If Jollibee does not improve its product structure and promotion themes in time, it may lose competitiveness or weaken its market competitiveness [1].

Regional cultural differences still exist. The Western market has limited acceptance of core products such as sweet noodles, so cross-cultural marketing needs continuous investment [3].

3. Implications for Catering Companies

In terms of product strategy, companies should keep core products and adapt to local markets. Catering companies expanding overseas should first make 1–2 core products to establish brand recognition, then adjust menus according to local tastes instead of forcing their mother country's flavors on others (entered the Chinese market, it added Chinese dishes). At the same time, a health-oriented product line should be proactively planned to adapt to the structural changes in consumption trends such as light diet and low-sugar intake [1].

In terms of marketing strategy, companies should build emotional connections with customers. Instead of only talking about product advantages, they should tell stories about family and company that arouse empathy [7,12]. They should use social media to start activities and let customers share, so that more people know the brand. In terms of store location, companies can first open stores in Chinese or immigrant communities to reduce risks, then expand to mainstream markets. Offline stores should fit local habits, and establish online ordering channels to achieve full-channel coverage at the same time [8].

In terms of expansion, companies should find good partners and leverage their strengths. Buying local mature brands is a good way to enter new markets quickly (like Jollibee buying Yonghe King), but companies should clearly define each brand's position to avoid homogenization that may cause confusion in consumers' perception [1].

In terms of channel management, companies should build their own online channels and understand local culture. They should not rely too much on third-party platforms. By guiding consumers to migrate to the brand's own channels, they can achieve cost reduction in customer acquisition and gain control over user data. The planning of marketing content also requires in-depth research on the cultural norms and sensitive issues of the target market to reduce the potential risks of cross-cultural communication errors [3].

In terms of financial management, companies should keep a balanced structure, companies should reasonably plan the allocation structure of resources They should ensure enough money for marketing innovation and control debt to avoid financial pressure that compresses marketing budgets and weakens the enterprise's ability to adjust strategies in response to market changes [2].

Finally, when companies grow to a certain size, corporate social responsibility (CSR) is very important. CSR is not only a moral choice but also a way to improve core competitiveness and achieve long-term development. It connects company development with social progress and brings win-win results in economy, society and environment [11].

4. Conclusion

Jollibee's success lies in keeping its own features and flexibly adapting to different countries. Its essence is the combined effect of "cultural connection + emotional empathy + flexible adaptation". Its localized regional implementation of its 4P strategies, digital system and multi-brand cooperation form its core competitiveness.

With affordable prices, numerous stores and warm marketing, Jollibee has gone global from the Philippines. Its experience tells us that for an enterprise to succeed, it is necessary to deeply understand the needs of its target consumers, enhance its ability to adapt to the local environment, and while improving the quality of its products and services, strengthen the emotional connection with consumers through effective brand narrative strategies.

For catering brands that want to grow bigger, the relevant practices of Jollibee are very useful references. Learning from Jollibee can help reduce risks and improve the chance of continuous growth and expansion.

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