

# **Global Vision, Regional Focus, “Glocal” Reality: Global Marketers, Marketing Communications, and Strategic Regionalism’**

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## **Abstract**

Global marketers have long been perplexed with the question of how to make global branding work. Historically, this issue generally pivots around whether, in what situations, and to what extent advertising across national and regional borders should be “standardized”, or alternatively, “localized”, that is, made specific to each market. While questions of cultural diversity and geographical difference have dominated debate, other factors also affect the success of standardized advertising. This paper focuses on organizational structures, management, products and marketing efforts in an investigation of the shifting attitudes of global marketers to the issue of corporate and advertising standardization versus localization. It surveys the advertising trade-press literature of the past ten years to examine the corporate strategies of two global marketers: Procter & Gamble and McDonald’s. This examination reveals that “glocalization” – an amalgam of global strategy and local adaptation – continues to be the dominant global marketing approach. Furthermore, there is also evidence of increased efforts towards regionalization of corporate operations and marketing strategies. Finally, it is also found that certain singular individuals, such as company CEOs and other senior executives, exert a clear influence on global corporate strategy. This influence goes some way to explaining the dramatic shifts and changes of marketing direction that often characterize the stance of global marketers on global advertising strategy.

Global marketers have long been perplexed with the question of how to make global branding work. Historically, this issue generally pivots around whether, in what situations, and to what extent advertising across national and regional borders should be “standardized”, or alternatively, “localized”, that is, made specific to each market (Duncan & Ramaprasad, 1995). Advocacy of advertising standardization has arisen at various points since the idea was first mooted in the 1920s (Chandra, Griffith & Ryans, 2002, pp. 69-70), notably the early 1960s (Elinder, 1961), and, most recently, the early 1980s, when it re-emerged to become a major preoccupation in international marketing communications. This current period began with the British agency Saatchi & Saatchi advocating the advantages of standardized campaigns for global advertisers, and of having a global agency, such as themselves, to implement them. In advocating this approach, the Saatchis drew considerable inspiration from the work of Harvard business theorist Theodore Levitt (Mattelart, 1991) and particularly his influential 1983 article, “The globalization of markets”.

In this article, Levitt (1983, p. 92) proclaims a “new commercial reality” based on the “emergence of global markets for standardized consumer products on a previously unimagined scale”. Gone, he argues, are “accustomed differences in national or regional preference” (p. 92), or “ancient differences in national tastes or modes of doing business” (p. 93). In their place, he suggests, is a “commonality of preference” which “leads inescapably to the standardization of products, manufacturing, and the institutions of trade and commerce” (p. 93). For global corporations, the advantages of his thesis and of the concomitant idea of standardized marketing and marketing communications are obvious and numerous. These include, “the creation of a stronger global international identity through consistent positioning and image across markets over time [...] and cost reduction through economies of scale in advertising production, sharing of experience and effective use of advertising budget” (Tai, 1997, pp. 56-7). In other words, the globalization of markets concept is attractive for global marketers insofar as it promises greater global returns through the adoption of standardized marketing communications efforts.

However, in the years following the publication of Levitt’s article, the reality of global marketing has proved somewhat more complex than the “globalization of markets” argument suggests, with marketers having to “glocalize” their global campaigns, adapting them to suit particular local market conditions. There are a number of manifest reasons for this. For example, in a region such as Asia, complex socio-cultural, religious and geographical differences characterize the many national markets within the region (Cohen, 2002; Rothrock, 2004). Global marketers must respond to these complexities, however, matching marketing communications efforts to local cultural and other differences is a difficult and potentially costly process.

Given these difficulties, and given the higher returns promised by more standardized communications approaches, the pull is often in the direction of greater standardization. One way to understand this preference is as a kind of inverse of how homogenization and heterogenization are understood within globalization theory (Appadurai, 1990). Whereas processes of homogenization are seen as a problem by globalization theorists, within marketing communications, homogenization, at least in the form of operational and especially advertising standardization, represents the Holy Grail. Moreover, whereas globalization theorists are generally favourably disposed towards notions of cultural heterogenization, its rough equivalent in marketing communications terms, localization, is only adopted by global marketers with reluctance. Nevertheless, finding a balance

somewhere between the two is considered crucial to the success of global marketers' communications strategies, as this paper will go on to argue.

While questions of cultural diversity and geographical difference have dominated debate, other factors also affect the success of standardized advertising, including such issues as regulation, product use patterns, socio-economic levels of development, education, language differences, and organizational structures (Duncan & Ramaprasad, 1995, p. 56).

This paper focuses on organizational structures, management, products, marketing and advertising efforts in an investigation of the shifting attitudes of global marketers to the issue of standardization versus localization. The paper draws from a “meta analysis” of the advertising trade-press literature of the past ten years (1997-2007) to examine the corporate and marketing communications strategies of two global marketers: Procter & Gamble and McDonald's. These two corporations have been selected due to the almost total global penetration of their business and marketing operations, and also because each has developed particular and quite distinct responses to the issue of standardization. The primary trade-press publications examined in this study are *Advertising News* (US) and *Media* (Hong Kong). These publications have been selected as they constitute a leading international and a leading regional forum, respectively, for the reporting of key developments and emerging trends in the area of global advertising. These two sets of texts form the core material for examining global marketers and their advertising and management strategies in this paper. Study of this material is supplemented by, and interpreted through, reference to a number of critical studies within the available literature on the subject.

From this meta-analysis, the following three insights emerge. The first is that the dominant marketing communications approach of corporations such as Procter & Gamble and McDonald's is that of “glocalisation” – a mix of global strategy and local adaptation. The second is that there is increased evidence of what we are terming “strategic regionalism” – that is, the concentration of corporate operations and marketing communications strategies in and around particular strategic global regions (such as Asia). This is done in order to leverage greater effectiveness in their marketing communications efforts and thereby achieve greater sales and market dominance within the region and globally. The final insight concerns the need to pay greater attention to the influence of high profile corporate executives and the significant but sometimes overlooked role these individuals play in shaping the direction of global marketing communications efforts.

Before proceeding, it is necessary to preface this discussion of Procter & Gamble and McDonald's with two comments on terminology. First, it should be noted that, to avoid confusion, throughout this paper we are using the phrase “marketing communications” as a blanket term for all the ways that global marketers communicate with their markets, including via the use of advertising, branding, and various more specific forms of marketing and promotional activities (Rossiter & Bellman, 2005, p. 6). Secondly, one of the difficulties encountered in the course of this analysis is the tendency for terms such as localization and regionalization to be used interchangeably at times. Putting aside various linguistic, geographic and other complexities, there are clear and quite straightforward distinctions between the two terms as they are used in this paper. Localization is understood here to refer to marketing communications efforts within specific national markets (China, Indonesia, Malaysia, and so forth), whereas regionalization refers to marketing communications and other corporate strategies across particular geographical regions, such as Asia or Western Europe.

## **Procter & Gamble: Corporate flexibility and the standardization-localization continuum**

In the late 1990s, Procter & Gamble – long the world’s largest advertiser – began the process of a major operational restructure, dubbed “Organization 2005” (or O-2005). This restructure had the effect of “further centraliz[ing] an organization already more centralized than its peers” (Neff, 1998).

Initiated in 1997, the O-2005 review was “designed to balance global and local advantages and considerations” (Dyer, Dalzell & Olegario, 2004, p. 308). Prior to the restructure, Procter & Gamble was organized into four regions – North America, Latin America, Asia and Europe/Middle East/Africa – with “category managers” functioning within each region (Neff, 1998). The result of the new corporate structure was a business “matrix” with two axes. Along one axis, “Procter & Gamble grouped its businesses into seven global business units (GBUs)”, or brand management groups (Dyer, Dalzell & Olegario, 2004, pp. 294-5). Along the other axis, the company arranged its global business services into “eight geographically based market organizations (MDOs)” (pp. 294-5). In practice, the two axes were supposed to interact as follows: “The GBUs would develop and manage strong global brands” by developing largely standardized global products, “while the MDOs would plan and execute” the company’s marketing strategies, including through the adaptation of standardized advertising (and to a lesser extent the products themselves) to local conditions (p. 294). The theory was that, with this system, Procter & Gamble would be able to “balance global advantages of scale with the particular demands of local circumstances” (p. 294). In other words, it would enable them to operate “glocally”.

The O-2005 plan was to simplify the structure and chain-of-command of the company’s worldwide operations, as well as “reshape Procter & Gamble’s corporate culture” to “encourage speed, flexibility and personal leadership” (Neff, 1998). To this end, Procter & Gamble also set about streamlining its agency relationships through even tighter global alignment. For example, in the late 1990s, the firm consolidated its accounts globally with its “favored four” agencies: Saatchi & Saatchi, D’Arcy Masius Benton & Bowles, Grey Advertising and Leo Burnett Co. (Snyder & Neff, 1999). In addition to this, over the next few years Procter & Gamble set about “winnowing” its extensive roster of over two hundred global marketing services shops and its interactive agencies (Neff, 2003a). And, in 2003, Procter & Gamble approached its two main agency holding companies, Publicis Groupe and Grey Global Group, asking that they “pitch plans to consolidate or re-organize its global retail marketing effort” (Neff, 2003b). All of these consolidating moves were aimed at facilitating the “faster flow of information” between Procter & Gamble, its agencies and its retailers, thereby streamlining its global marketing communications efforts.

One result of these numerous consolidations, however, is that Procter & Gamble has by their own admission sometimes gone too far down the standardization path, especially with some brands. A good illustration of this was the company’s disastrous decision to change the name of Escuda, a bar soap strong in Mexico, to its North American brand name of Safeguard; sales plummeted until the product name was switched back to Escuda, which saw volume jump again (Neff, 2002b).

In their marketing, Procter & Gamble still demonstrated a clear preference for global standardization. Moreover, while not insensitive to local complexities and ongoing tensions between standardization and adaptation, it is clear that Procter & Gamble’s particular

corporate structure impacts on the company’s understanding of these tensions, and it is useful to grasp how this is the case. The most significant factor is the move towards the creation of GBUs and global general managers (and, in some cases, global brand managers) as a result of the O-2005 restructure. This has had a profound impact on how Procter & Gamble negotiates global-local complexities at an operational level. The company is ever alert to opportunities to transfer successful media and other strategies between regions. But they have also actively set out to “decentralize” (or “localize”) certain core marketing functions, such as media and “interactive” media buying. In the case of media buying, one company executive is quoted in 2003 as saying that, “Media buying remains by necessity more of a local function, since media markets tend to be national rather than global” (Neff, 2003c). In the case of interactive media buying, Procter & Gamble announced in 2002 that it was dropping Grey Global Group’s Beyond Interactive, New York, as their “interactive agency of record”, vesting control of this form of media buying instead in the company’s own brand groups in order that they could be “more effective at creating holistic media plans” (Neff, 2002a).

These maneuvers aside, the overall company philosophy on the issue of standardization and adaptation is unequivocal. As Procter & Gamble’s Global Marketing Manager, Jim Stengel, puts it, the “organization is flexible enough to work between the extremes of standardized global brands and total local control” (Neff, 2002b). According to Stengel, global branding has to be thought of as a continuum “that has absolute standardization on one end, and total local adaptation on another end”. Global brands, he suggests, are always somewhere on that continuum. In addition, decisions have to be made on “hard points” (things to keep consistent across markets, like manufacturing equipment) and “soft points” (things that can be changed, like brand names, colors, and patterns) (quoted in Neff, 2002b). A good example of this is laundry detergent, where the company’s long-running Tide line of products have undergone minor modifications to brand naming and packaging, and advertised under the Ariel label in Latin America and Europe with considerable success and remarkable consistency with the brand’s North American equivalent.

For Procter & Gamble this approach is possible and has proven successful for a number of reasons. On one level it has to do with economies of scale – Procter & Gamble is big enough to be able to shift resources when and where required between global strategies and local implementations. On another level it has, at least in part, been possible due to the influence of A. G. Lafley, the company’s current CEO and Chairman. Lafley took over as CEO in 2000 and immediately set about ironing out difficulties experienced in implementing its O-2005 review, subsequently creating what is now regarded as a much leaner and more flexible global operation (Dyer, Dalzell & Olegario, 2004, pp. 301-9). He also set about pruning the company’s brand portfolio and reset its priorities as developing its biggest core brands and biggest markets, namely China and the US (pp. 301-9). It is these factors in combination that make it possible for Procter & Gamble to successfully negotiate the standardization-localization continuum and tap into diverse geographical and socio-cultural contexts and markets.

To summarize, the key development for Procter & Gamble over the past ten years has occurred at the organizational level, with the company realigning its worldwide operations to achieve greater synergy between its global brand categories and its regionally-oriented market development organizations. Despite these structural upheavals, however, the company’s approach to branding, product development, and advertising has remained relatively stable. All are firmly “glocal” in orientation, with brands, products and marketing

communications strategies developed and set centrally and then adapted to suit individual markets.

### **McDonald’s: Think global, act local**

In 2004, McDonald’s Global Chief Marketing Officer Larry Light caused a stir in advertising circles by declaring that “the days of mass marketing are over” (quoted in Cardona, 2004). McDonald’s was said to have “ditched traditional brand-positioning marketing” in favor of an alternative approach which Light referred to variously as creating “brand journalism” or a “brand chronicle” – that is to say, taking a narrative approach that “seeks to tell as many different stories in as many different ways as it takes to reach McDonald’s 47 million consumers in 119 countries” (2004). According to Light, “a brand is multidimensional. No one communication, no one message can tell a whole brand story” (quoted in Cardona, 2004). Light’s (and McDonald’s) philosophy is that each “communication” addresses “one facet of the brand” which over time work to compile a “brand chronicle” or “brand story” for consumers (Cardona, 2004). For Light, McDonald’s “I’m Lovin’ It” campaign has been a crucial element in this “brand journalism” approach and it has been claimed to have “reinvented a brand that had lost its way” (Cardona, 2004). The origins of the slogan behind this campaign, which was launched in 2003, can shed light on McDonald’s overall global marketing strategy and its position on the standardization-localization debate.

By 2004, McDonald’s had moved away from the company’s traditional approach of having the agency office closest to headquarters taking the lead in creating its global campaigns (Cardona, 2004). It drew more on its agencies around the world, calling on them to produce creative ideas which it could then review for selection. In the case of “I’m Lovin’ It”, this slogan emerged from a lesser known European agency, DDB’s Heye & Partner, Hunterhaching, Germany. Once selected, however, the transformation from the germ of an idea to a fully-fledged advertising campaign was developed centrally, with creative work handled on a global basis, but where local agencies were given the opportunity to tailor (“adapt”) the campaign to suit each national market. An example cited by Light as to how this works in practice is through the creation of a kind of global TVC (television commercial) “template” which included “green-screen segments” where local agencies could “insert local touches” (Cardona, 2004). So, for example, in adapting North American TVCs based around the “I’m Lovin’ It” theme for mainland China, the American singer Justin Timberlake is replaced by Wang Leehom, a popular local singer performing a Mandarin version of the campaign jingle (Madden, 2003). This strategy is repeated with other minor variations in each of McDonald’s Asian markets (Liu, 2003; Madden, 2003).

The overall process that is described here – a single global campaign designed for local adaptation – is indicative of McDonald’s philosophy of “think global, act local”. This approach informs all facets of the company’s global business operations – menu development, pricing, corporate training, et cetera – as well as its worldwide marketing communications strategy. All of McDonald’s operations are in some way structured around global-local tensions. Obviously, certain facets of its global operations are more readily “standardized” than others, such as food supply and processing, point of purchase, signage and design, and so on (Vignali, 2001; Watson, 1997). In some cases, these standardized business practices have their own advantages when it comes to adapting to the cultural specificities of emerging markets. For instance, McDonald’s corporate training program is considered a standardized strategy. But it is one that has distinctly “local” outcomes and

advantages in that it trains local managers who then “understand both the corporate and local cultures” (Vignali, 2001, p. 107; Watson, 1997, pp. 12-14).

Other business practices require more substantial adaptation to meet local conditions, including pricing structures and menu options. With respect to the first of these, McDonald’s pricing structures are tailored to meet the various socio-economic capacities of consumers in each market; what is considered the most acceptable (if not necessarily the most desirable) price is always measured against the company’s local competitors (Vignali, 2001, pp. 101-3). With respect to menu options, there are substantial cost savings to be had in standardizing its menus, but McDonald’s has discovered that localizing its menus is crucial to its long term success in emerging markets. It regularly tailors menu options to meet various cultural and religious laws and customs, and caters for different consumer taste preferences in different countries, particularly in Asia, in order to maintain long term growth and find cultural acceptance as part of the wider “foodscape” in these markets.

There are numerous examples of McDonald’s adapting its menu in these ways, especially to suit local palates: in Taiwan, shrimp-flavored toasted rice burgers and ginger egg tarts are on the menu; in Hong Kong there is Chicken Fan-tastic and Beef Fan-tastic rice burgers; bean sundaes, rice, taro pies and seafood soup in China; Teriyaki burgers in Japan; the McLaks grilled salmon sandwich is available in Norway; the McHuevo poached egg burger in Uruguay; and the list goes on (Watson, 1997, pp. 23-24; White, 2006; Desker Shaw 2006; Fowler & Settodeh, 2004; Vignali, 2001, p. 99). These are all examples of the way that McDonald’s has “localized” its original menu offerings. Even so, as Watson (1997, pp. 24-25) astutely notes, the “keystone” of McDonald’s “winning combination” is also the most standardized item on its menu – its fries. This is McDonald’s signature food and “is ever-present and consumed [world-wide] with great gusto” (p. 24) by all McDonald’s customers, “irrespective of their religious beliefs or political stance” (Vignali, 2001, p. 100). Thus, while in many ways McDonald’s has actively “localized” its menu options to cater to different tastes and cultural sensitivities, in at least one key instance – its fries – it has maintained a consistent and very much “standardized” approach to its food production operations.

The company’s adaptive strategies even extend to the company’s iconic male mascot Ronald McDonald. In China, for instance, Ronald was paired with a female version, Aunt McDonald, “whose job it was to entertain children” (Watson, 1997, p. 19). This is one example of McDonald’s paying attention to a specific market, while aware that this particular adaptation “would only work in certain international fast food markets and not work on a global scale” (Vignali, 2001, p. 106).

As noted earlier, the “glocal” or adaptational approach is also particularly evident in McDonald’s global marketing communications strategies – especially the various localized versions of the company’s “I’m Lovin’ It” TVCs.

However, when it comes to its agency relationships and media buying, a standardized approach remains in evidence. In 2006, McDonald’s confirmed its global alignment of its creative work with its two “agencies of record”: Leo Burnett and DDB (“McDonald’s plots Singapore growth”, 2006), with the aim that both would produce creative work suitable for local adaptation. As for media buying, McDonald’s took the opposite approach to Procter & Gamble, centralizing its media buying at a global level by handing it to the Omnicom-owned OMD in 2003-04 in order to “squeeze higher efficiency and fuel greater innovation and creativity” (“McDonald’s turns to OMD”, 2003; “McDonald’s taps partner”, 2004). In both

cases, McDonald’s embraces a more overtly “standardized” marketing communications strategy.

Finally, and in addition to the above, it is interesting to note that there is mounting evidence from the literature over the past ten years that McDonald’s is becoming increasingly interested in exploring opportunities for adapting standardized marketing messages at a *regional* level also (see “Euronews”, 1998; Hargrave-Silk, 2006). For instance, in 2005 the company announced its “first pan-Asia initiative”: the Prosperity Program (Madden, 2005; Desker Shaw, 2005). Based on its “Prosperity Burger”, the program employed the promise of good luck as an “insight that cuts across borders of nine very diverse markets” (Madden, 2005). As this represents a relatively recent development for the brand, it will be interesting to continue to observe and record the extent to which this emerges as a key strategy for McDonald’s over the ensuing decade, particularly given its past willingness to adapt to specific national markets.

In summary, every facet of McDonald’s corporate operations is in some way structured around global-local tensions and can be located at different points along the standardization-localization spectrum. One of the keys to McDonald’s ongoing success as a global corporation is the flexibility it displays in responding to market specificities and cultural and other differences. McDonald’s seem content to keep certain elements of its global operations unchanged, while equally content to adjust other elements when and where required. This approach has not changed over the past ten years. What has changed, however, and is striking from a global marketing communications perspective, is the company’s emerging interest in “strategic regionalism” and advertising.

### **Glocalization, Strategic Regionalism and the Cult of Personality**

From this study of Procter & Gamble and McDonald’s, a number of insights can be drawn about these global marketers and their corporate operations.

The first insight is that “the global-only campaign does not exist” (Lindstrom, 2006) and that Theodore Levitt’s prophecy of the globalization of markets and universal standardization did not eventuate. By the same token universal localization does not exist either. Rather, the dominant global marketing communications approach is that of “glocalization” – an amalgam of global strategy and local adaptation. This is likely to remain the dominant model at least for the foreseeable future (Sinclair, 2001).

Within this focus on the “glocal”, the specific approach that each corporation takes can shift depending on which aspect of its overall operations is involved. Thus, organization, product and advertising can and often are globally aligned or locally adapted to differing degrees depending on the company, the particular point in time, and other circumstances. Interestingly, though, when limited to advertising alone, there is remarkable consistency over the ten year time period examined here in the way that personal products and food brands have been advertised (see Tai, 1997, p. 53).

The second insight concerns evidence, first noted in 1997 (Tai, 1997), of increased efforts towards regionalization of corporate operations and marketing strategies. In marketing communications terms, regionalism is desirable, particularly if a corporation wishes to build up a pan-European or pan-Asian brand image.

The picture that emerges from the present study of Procter & Gamble and McDonald’s extends beyond the tailoring of marketing strategies to different regions. As earlier studies have noted, “multinationals have been advised to follow a regional approach by thinking globally, acting locally and managing regionally” (Tai, 1997; Banerjee, 1994). This is consistent with the findings of this paper and its study of the trade-press literature during the decade that followed these earlier studies. Building on this observation, the approach of the global corporations under discussion here suggests what we have been calling a form of *strategic regionalism*, where, over the past ten years, organizational structure, ad creation and marketing strategies have been realigned to varying degrees and in different ways around the concept of the global region.

Ten years ago, Tai (1997, pp. 59-60) predicted an intensification in regionalization and a corresponding decline in the importance of adopting a global advertising approach. Other critics have asserted that the “hope for regional ‘consumer clustering’ remains more hype than reality” (Kanso & Nelson, 2002, p. 86). This study has shown that neither assessment is entirely accurate. Regionalization is of continuing interest to global marketers, who do see it as a viable marketing strategy. By the same token, however, “strategic regionalism” is unlikely to diminish an overall adherence to globalized – or more accurately, “glocalized” – advertising approaches.

The final insight to be drawn from this study is the clear influence that certain singular individuals, such as company CEOs and other senior executives, exert on global corporate strategy. While it is clearly not the only factor or force affecting change, this influence goes some way to explaining the dramatic shifts of marketing direction that often characterize the stance of global marketers on global advertising strategy. Corporate personnel shifts form a major preoccupation of advertising trade publications such as *Ad Age*, *Media*, and others. But these changes are more than shop-talk, as they can make a significant difference to actual marketing and business communications strategies, and help to shape what position corporations take with respect to regionalization and the standardization-localization continuum. Therefore, tracking personnel shifts and the cult of the high-level corporate personality, and also paying greater credence to the trade press’ role in reporting these shifts, may well prove productive to researchers in gaining background insight into the corporate strategies of global marketers as well as their likely future directions with respect to marketing communications in the age of globalization.

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