

Are US companies employing standardization or adaptation strategies in their international markets?

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Abstract

Whether to standardize or adapt marketing operations in international markets is the major decision companies marketing their products or services overseas need to make. This decision concerns firms beginning to market in foreign countries and those already operating internationally that are considering expanding into additional markets.

Despite significant research on this topic over the last three decades, there are significant knowledge gaps that still persist: (1) do companies operating internationally favor a standardized or adaptive strategy, (2) is the level of standardization or adaptation consistent across the various elements of firms' marketing mixes and (3) what are the internal and external factors that drive companies' standardization/adaptation decision?

A survey of 154 companies marketing food products internationally was conducted to address these issues. The results of this study call into question some of the most widely-accepted notions concerning the deployment of firms' standardization/adaptation strategies and the factors supposedly related to this decision for companies marketing non-durable consumer products internationally. Possible explanations for these surprising findings are offered as are recommendations as to what future research needs to be done so that a more insightful understanding of this important international topic can be achieved.

Introduction

Perhaps the most important decision facing companies beginning to operate in overseas markets is the extent to which those operations will be the same (standardization) or different (adaptation) from their domestic ones. This decision also must be made by firms currently plying international waters which decide they want to expand into additional foreign countries, but with an additional dimension: Will the new operations mirror those presently in play in the firm's already-existing international markets, or will they deviate from them? Cavusgil and Zou (1994) state that "in international marketing, the key consideration is whether the marketing strategy should be standardized or adapted to the conditions of the foreign market." Cavusgil (1995), as editor of the *Journal of International Marketing*, identified standardization vs. adaptation as one of four "special challenges in international marketing," along with market/customer assessment and selection, methods for getting close to international customers and branding, labeling and packaging.

Virtually all aspects of a company's operations are affected by the standardization/adaptation decision, including entry strategies, R&D, production, procurement, finance, organizational structure and, primarily, its marketing mix.

The literature dealing with this topic has taken three approaches: (1) developing a case (usually framed as advantage) for whether standardization or adaptation, or some combination thereof, would be appropriate, (2) the conditions (external and internal) that should impact this decision, and (3) the extent to which standardization or adaptation is, in practice, being implemented by companies in their overseas operations.

Arguments for Standardization and Adaptation

Wang (1996), in reviewing the literature, states that the "decades-long debate about standardization and adaptation has recently reached the general consensus that the real issue is not whether to standardize but rather to what degree of standardization..." Buzzell (1969) writes "management should not automatically dismiss the ideas of standardizing some parts of the marketing strategy..." Several advantages of standardization are offered by Carpano and Chrisman (1995), including economies of scale, increased learning, and cost savings from "making a uniform product." Walters (1986) cites cost savings as a major benefit of uniformity (standardization). Schuh (2000) advances cost advantages due to scale economies and product standardization.

Levitt (1983) developed the most comprehensive and compelling arguments for standardization, making his case on the basis of improved technology, increased world-wide communications, and homogenization of cultural preferences and tastes. According to Levitt, the "global competitor will seek constantly to standardize his offering everywhere... He will never assume that the customer is a king who knows his own wishes."

Levitt's article elicited several critical responses, most notably, Boddewyn, Soehl and Picard (1986), Douglas and Wind (1987) and Walters (1986). Douglas and Wind rejected Levitt's premise on a number of bases, such as, lack of homogenization in world markets, greater levels of heterogeneity within countries, the reluctance of consumers to trade off product features for lower prices, economies of scale attainable to lower levels of output, the existence of various external obstacles to standardization (governmental and trade restrictions, different marketing infrastructures and competition), and such internal factors as the inability to standardize current

international operations which are adaptive and represent management's disposition against standardized strategies. Bodewyn, Soehl and Picard (1986) fault Levitt for the lack of empirical evidence to support his assertions. Walters (1986) cites the lack of expected benefits as a reason not to embrace full-scale standardization. Schuh (2000) believes that a standardized marketing mix would not be appropriate in marketing to the Central Eastern European countries of Poland, Czech Republic, Slovakia, Hungary, and Slovenia because of gaps in purchasing power and different levels of market development.

Conditions Impacting the Standardization/Adaptation Decision

A large number of factors affecting the standardization/adaptation decision have been discussed. These fall into two categories: Those internal to firms marketing their products internationally and those external to them. The most significant of these have been captured in Table 1. Company objectives, operations and performance variables are the major internal factors, while competition, host-country factors and international markets comprise the chief external ones.

Extent of Standardization/Adaptation in Companies' Overseas Operations

Ward (1973) reported that two-thirds of European firms adapted their products for the United States market. However, the adaptations were mainly low-cost modifications. Kacker (1972, 1976) found that 45% of U.S companies reported significant changes in products marketing to India. Weinrauch and Rau (1974) discovered that about half of exporters claimed that product modifications were important. Bodewyn, Soehl and Picard (1986) provided a longitudinal analysis (1973, 1978, 1983 and 1988 projected) of the standardization/adaptation strategies of U.S. manufacturers of consumer nondurables, consumer durables and industrial products doing business in the European Community. The major findings for 1988 compared to 1973 were:

1. For consumer nondurable products (1988 projected), 42% of the respondents reported "very substantial product standardization." This compared to 25% for 1973.
2. For consumer durable products, 38% of the respondents reports "very substantial product standardization" (1988 projected), up slightly from 33% in 1973.
3. For industrial goods, the 33% figure projected for 1988 was down from the 50% figure existing in 1973.

Douglas and wind (1987) believe that few companies "pursue the extreme position of complete standardization with regard to all elements of the marketing mix... Rather, some degree of adaptation is likely to occur relative to certain aspects of the firm's operations or in certain geographical areas." Sorenson and Weichman (1975) found that three-fourth of companies employed highly standardized national advertising. A study in Marketing News (1987) discovered that 79% of companies had distinctly different media plans in each country. Martenson (1987) concluded that products were becoming more standardized, as did Walters (1987). Ryans and Donnelly (1969) found that 90% of surveyed companies made some use of uniform advertising policies, but only one-sixth did so for more than 50% of their international advertisements; Britt (1974) concluded that little standardization for international advertising was occurring. Dunn (1976) reported that the percentage of companies using similar advertisements in international markets had declined between 1964 and 1973. Schuh (2000), in

analyzing the marketing operations of eight Western companies doing business in Central Eastern Europe, stated that "six of the eight cases show a high degree of marketing program standardization." Hise and Gabel (1995) indicated that 151 U.S. companies with international operations in at least five foreign markets were using the same customer service strategies in their overseas markets as they were employing domestically.

Although there has been a great deal of attention paid by scholars to the topic of standardization/adaptation over the last three decades, a careful analysis of the relevant literature results in the conclusion that we really do not know much about it. Some of the discussion is merely anecdotal, such as, Parker Pen's ill-fated adoption of a standardized, world-wide advertising strategy in the early 1980s (Czinkota and Rankainen 1988), Black and Decker's production and marketing of standardized products for its international markets (Yip 1996), Nestle's use of both world-wide and local brands (Fry 1996), W.R. Grace's development of an adaptation strategy for its Cryovac food wrap (Gibson 1986), and the degree of standardization/adaptation employed by eight companies, e.g., 3M, McDonald's, Ogilvy & Mather, and Philips Electronics, in entering the emerging markets of Central Eastern Europe (Schuh 2000). According to Samiee and Roth (1992), much of this work is conceptual in nature, without data to support or reject authors' assertions. Empirical studies have not proved to be a panacea, either; Carpano and Chrisman (1994) and Bodewyn, Soehl and Picard (1986) decry the lack of reliable data. Most research has only a limited perspective in that they deal with one aspect of the marketing mix (usually product or advertising) and a single, non-global market (LDCs, Western Europe, Central Eastern Europe) (Samiee and Roth, Schuh 2000, Walters 1986). Another problem is the lack of recency in empirical analyses; very little has been done during the preceding decade.

Because of these deficiencies, we lack the following critical information about the most important decision companies plying international waters must make:

1. Are those companies operating internationally in today's turbulent global business environment favoring a standardization/ or adaptation strategy?
2. Is the level of standardization or adaptation consistent across the various elements of the marketing mix? If not, which elements exhibit a standardization strategy, which are adapted?
3. What are the factors that drive a company's standardization/adaptation decision? Do internal or external factors dominate?

The Study

In an effort to obtain the answers to these questions, a questionnaire was developed and mailed to 800 companies with SIC code 2000, Food and Kindred Products, that had international operations as indicated in Ward's Business Directory. This industry was selected because that relevant literature contains the clearest and most definitive indication, compared to other industries, as to what should be their standardization/adaptation strategy. This survey was directed to Head, International Operations. A total of 154 usable responses were obtained, resulting in a response rate of 20.7%, since 55 surveys were returned as undeliverable ($154/745=20.79$).

In order to test various hypotheses, the questionnaire contained three parts. The first part requested information about the company, such as annual sales, percentage of sales from international operations, and location (countries or regions) of their international operations. The

second required respondents to indicate the extent to which 32 elements of the marketing mix deployed in their international markets were similar to those used in their domestic markets. The response alternatives were “very different,” “somewhat different,” “somewhat similar,” and “very similar.” Part III asked the executives to identify the extent to which 17 factors were considered important in determining the similarity or difference in the international marketing mixes from their domestic ones. The response options available were “not important,” “somewhat important,” and “very important.”

An analysis of the relevant literature prompted the development of 22 hypotheses which are believed to be helpful in answering the questions posed above.

Are Companies Employing A Standardization or Adaption Strategy?

The type of product is a strong determinant of whether a standardization or adaptation strategy will be in place. High-tech products are more likely to be associated with a standardized strategy than an adaptive one (Cavusgil and Zou 1994; Duprez, Diamanto, Poulos, and Schlegelmich 1994; Wang 1996). Industrial products are more likely to be marketed through a standardized strategy than through an adaptation approach (Boddewyn, Soehl and Picard 1986; Quelch and Hoff 1986; Samiee and Roth 1992; Solberg 2002). Consumer products will normally be marketed via an adaptation strategy (Chung 2003; Quelch and Hoff 1986; Samiee and Roth 1992; Schuh 2000). Among consumer goods, non-durables are less able to be marketed through standardized means than are consumer durables (Boddewyn, Soehl and Picard 1986; Chung 2003; Wang 1996; Whitelock and Pimblett 1977). Within the consumer non-durables sector, adaptive strategies are generally perceived to be more appropriate (Chakravarthy and Perlmutter 1985; Rau and Preble (1987), with food offering particularly constrained to an adaptation strategy (Barker and Aydin 1992; Boddewyn, Soehl and Picard determining the similarity or differences in the international marketing mixes from their domestic ones. The response options available were “not important,” “somewhat important,” and “very important.”

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Gibson 1986; Martenson 1987; Rau and Preble 1987; Wang 1986; Whitelock and Pimblett 1997). Because the purchase of food items is strongly driven by cultural factors, consumer tastes, habits, and incomes (Barker and Aydin 1991; Martenson 1987) and this study deals with companies selling food products internationally, the first hypothesis is:

H₁ Null: The marketing mixes of the respondent food companies will exhibit neither an adaptation or a standardization strategy.

H₁ Alternative: The marketing mixes of the respondent food companies will exhibit a pattern of adaptation.

Is The Level of Standardization or Adaptation Consistent Across the Various Elements of the Marketing Mix?

There is strong consensus in the literature that there will not be homogeneity in the degree of standardization/adaptation in companies' marketing mixes (Boddewyn, Soehl and Picard 1986; Douglas and Wind 1987; Quelch and Hoff 1986; Rau and Preble 1987; Yip 1996). In other words, different levels of standardization/ adaptation will exist for the various components of the marketing mix. Thus, the second hypothesis is:

H₂ Null: The level of respondent food companies' standardization/adaptation will be consistent across all elements of the marketing mix.

H₂ Alternative: The level of respondent food companies' standardization/adaptation will not be consistent across all elements of their marketing mixes.

A number of researchers have examined the standardization/adaptation question within the context of specific marketing mix elements. Based on their analyses, they have identified those marketing mix components that are likely to be standardized and which are likely to be adapted. In particular, advertising is likely to be adapted (Britt 1974; Boddewyn, Soehl and Picard 1986; Harris 1994; Theodosiou and Leonidou 2003; Walters 1986), as are channels of distribution (Barker and Aydin 1991; Martenson 1986; Rau and Preble 1987; Theodosiou and Leonidou 2003). Sales promotion (Barker and Aydin 1991; Kashani and Quelch 1990) and personal selling (Barker and Aydin 1991) are also likely to be adapted.

Based on the above assumptions, the following hypotheses were developed:

H_{2a} Null: The respondent food companies' product mixes will exhibit neither an adaptation or standardization strategy.

H_{2a} Alternative: The respondent food companies' product mixes will exhibit an adaptation strategy

H_{2b} Null: The respondent food companies' advertising mixes will exhibit neither an adaptation or standardization strategy.

H_{2b} Alternative: The respondent food companies advertising mixes will exhibit an adaptation strategy.

H_{2c} Null: The respondent food companies' customer service mixes will exhibit neither an adaptation or standardization strategy.

H_{2c} Alternative: The respondent food companies customer service mixes will exhibit an adaptation strategy.

H_{2d} Null: the respondent food companies' pricing mixes will exhibit neither an adaptation or standardization strategy.

H_{2d} Alternative: The respondent food companies' pricing mixes will exhibit an adaptation strategy.

H_{2e} Null: The respondent food companies' channels of distribution mixes will exhibit neither an adaptation or standardization strategy.

H_{2e} Alternative: The respondent food companies' channels of distribution mixes will exhibit an adaptation strategy.

H_{2f} Null: The respondent food companies' sales promotion mixes will exhibit neither an adaptation or standardization strategy.

H_{2f} Alternative: The respondent food companies' sales promotion mixes will exhibit an adaptation strategy.

H_{2g} Null: The respondent food companies personal selling mixes will exhibit neither an adaptation or standardization strategy.

H_{2g} Alternative: The respondent food companies' personal selling mixes will exhibit an adaptation strategy.

What Factors Are Associated With Companies' Standardization/Adaptation Strategies?

Several factors postulated to be associated with companies' standardization/adaptation strategies have been identified by various researchers and have been incorporated into Hypotheses H3-H3:

H₃ Null: The method of competing in foreign markets will not be a determinant of whether the respondent food companies are employing an adaptation or standardization strategy.

H₃ Alternative: The respondent food companies that are exporting or using licensing or franchising to compete in foreign markets are more likely to be pursuing a standardization strategy than those using overseas sales/marketing offices and overseas

manufacturing facilities (Cavusgil and Kirpalani 1993; Chung 2003; Griffith, Chandra and Ryans 2003; Grosse and Zinn 1990).

H₄ Null: Characteristics of the international markets served by the respondent food companies compared to those in their domestic markets will not be a determinant of whether they are pursuing an adaptation or a standardization strategy.

H₄ Alternative: The respondent food companies are more likely to be employing a standardization strategy in markets with characteristics similar to those existing in their domestic markets (Anderson 1993; Barker and Aydin 1991; Bodewyn, Soehl and Picard 1986; Carpano and Chrisman 1995; Chung 2003; Griffith, Chandra and Ryans 2003; Hill and Still 1984; Huszagh, Fox and Day; Rau and Preble 1987; Samiee and Roth 1992; Szymanski, Bharadwaj and Varadarajan 1992; Theodosiou and Leonidou 2003; Walters 1986; Yip 1996). In order to operationalize this hypothesis, it is postulated that food companies doing business in Canada and Europe are more likely to be pursuing a standardized strategy than those operating in Mexico, Central America, South America, the Middle East, Africa, and Asia.

H₅ Null: The percentage of international sales to total sales will not be a determinant of whether the respondent food companies are employing an adaptation or standardization strategy.

H₅ Alternative: The respondent food companies with higher percentages of international sales to total sales are more likely to be pursuing an adaptation strategy than those with lower percentages of international sales to total sales (Cavusgil and Zou 1994).

H₆ Null: the number of years of international experience will not be a determinant of whether the respondent food companies are employing an adaptation or standardization strategy.

H₆ Alternative: The greater the number of years of international experience for the respondent food companies, the more likely they will be pursuing an adaptation strategy (Cavusgil and Zou 1994; Chung 2003; Jain 1994)

H₇ Null: the size of respondent food companies will not be a determinant of whether they are employing an adaptation or standardization strategy.

H₇ Alternative: The larger respondent food companies are more likely to be pursuing a standardization strategy than are smaller ones (Chung 2003; Sorenson and Weichmann 1975).

H₈ Null: The number of countries in which the respondent food companies are operating will not be a determinant of whether they are employing an adaptation or standardization strategy.

H₈ Alternative: The greater the number of companies in which the respondent food companies are operating, the more likely it is that a standardization strategy will be pursued (Yip 1989).

Because respondents indicated how important 17 variables were in determining the similarity or differences in their international marketing mixes vs. their domestic ones, it was possible to develop additional hypotheses (H₉-H₁₆) as suggested by previous researchers (See Table 1).

H₉ Null: Laws and regulations in host countries will not be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies.

H₉ Alternative: Laws and regulations in host countries will be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies (Buzzell 1968; Chung 2003; Yorio 1983).

H₁₀ Null: Competition encountered in host countries will not be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies.

H₁₀ Alternative: Competition encountered in host countries will be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies (Bodewyn, Soehl and Picard 1986; Chung 2002; Chung 2003).

H₁₁ Null: Physical infrastructure in host countries will not be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies.

H₁₁ Alternative: Physical infrastructure in host countries will be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies (Barker and Aydin 1991).

H₁₂ Null: Marketing infrastructure in host countries will not be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies.

H₁₂ Alternative: Marketing infrastructure in host countries will be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies (Chung 2003; Levitt 1983; Peebles, Ryans and Vernon 1978).

H₁₃ Null: The culture existing in host countries will not be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies.

H_{13} Alternative: The culture existing in host countries will be considered by the respondent food companies to be an important determinant of their standardization/adaptation strategies (Dunn 1976; Killough 1978; Tsi, Pan and Au 1997; Whitelock and Pimblett 1977; Yorio 1983).

H_{14} Null: The respondent food companies' desire to obtain economies of scale will not be an important determinant of their standardization/adaptation strategies.

H_{14} Alternative: The respondent food companies' desire to obtain economies of scale will be an important determinant of their standardization/adaptation strategies (Yorio 1983).

H_{15} Null: The respondent food companies' resource availabilities will be an important determinant of their standardization/adaptation strategies.

H_{15} Alternative: The respondent food companies' resource availabilities will be an important determinant of their standardization/adaptation strategies (Yorio 1983).

H_{16} Null: The needs and desires of consumers in international markets will not be an important determinant of their standardization/adaptation strategies.

H_{16} Alternative: The needs and desires of consumers in international markets will be an important determinant of their standardization/adaptation strategies (Barker and Aydin 1991; Carpano and Chrisman 1995; Chrisman and Roth 1994; Martenson 1987; Samiee and Roth 1994).

Results

Table 2 contains profile data on the 154 respondent firms. Their median annual sales are \$460 million, with a median 30% coming from their overseas operations. The median years of international experience was 20. Exporting was the preferred way to operate internationally; 92% were using this option. The second preference was the overseas sales/marketing office, with about three-fourth of the participating firms using them. Overseas manufacturing facilities was third in importance; 69.5% of the food companies indicated they were employing this alternative. Licensing was cited by 41.6% of the respondents, with franchising a distant fifth in importance with only 9.7% of the surveyed firms employing this operational alternative.

The median number of countries in which the respondent firms were operating was 12. Canada (85.1%) and Europe (also 85.1% of respondents) were the favorites, followed by Asia (77.3%), Mexico (68.8%) and South America (56.5%). Central America (29.9%), the Middle East (33.1%) and Africa (29.2%) were the least popular venues.

Are Companies Employing A Standardized or Adapted Strategy?

Null Hypothesis H_1 was rejected since all first-level elements of the marketing mix, promotion (54.9%), product (83.6%), distribution (55.4%), pricing (55.3%), and customer service (70.3%) (Table 3), had a majority of the respondents indicating the use of a standardized

strategy and all second-level elements of the marketing mix—advertising (51.4%), sales promotion (52.8), personal selling (61.2%), channels (55.6%), and logistics (55.3%) also demonstrated a standardization strategy. For the third-level components of the marketing mix, 24 out of 31 had a majority of the respondents indicating a standardization strategy; four of the seven less-than-majority, third-level headings were found in the sales promotion mix: contests (34.3%), coupons (32.1%), premiums (43.9%), and sponsorships (40.3%)

Is The Level Of Standardization Or Adaptation Consistent For The Various Elements Of The Marketing Mix?

Null hypothesis H₂ was rejected for the first-level elements of the marketing mix and partially rejected for the second and third levels (see Table 4). Chi-square analysis revealed a significant difference ($X^2 = 312.56$, df = 4, p = .001) in the levels of standardization/adaptation for promotion, product, distribution, pricing and customer service. Within the second-level marketing mix elements, the advertising, sales promotion and personal selling components of promotion exhibited a significant difference in the degree of standardization observed ($X^2 = 10.35$, df = 2, p = .01), but no difference at a statistically significant level was found for the components of distribution (channels and logistics) ($X^2 = .02$, df = 1, p = .99). The elements of sales promotion ($X^2 = 47.23$, df = 6, p = .001) and product ($X^2 = 28.62$, df = 8, p = .001) demonstrated significant differences in standardization/adaptation among the third tier of their marketing mix elements, but not so for advertising, personal selling, channels, logistics, and pricing, none of which had a p-value greater than .50.

Null hypothesis H_{2a} was rejected since all components of the respondent companies' product mixes exhibited a standardized pattern (all had more than fifty percent of respondents indicate that they were following a standardized strategy (Table 3).

Null Hypothesis H_{2b} was rejected since advertising appeal and advertising media had a majority of respondents indicating that a standardization strategy was in place (advertising copy was the exception) and 51.4% of all respondents indicated that, overall, a standardization strategy existed for advertising as a whole (Table 3).

Null Hypothesis H_{2c} was rejected since a majority of respondent companies (70.3%) indicated deployment of a standardized strategy for customer service (Table 3).

Null Hypothesis H_{2d} was rejected. Two of the three elements of the pricing mix (pricing objectives and dealer margins) exhibited a standardization strategy—prices was the lone exception—and 55.3% of respondents said that overall they were deploying a standardization strategy for pricing (Table 3).

Null Hypothesis H_{2e} was rejected because a majority of respondents revealed a standardization strategy for types of channels of distribution used (57.9%) and incentives provided channels to carry our products and aggressively market them (52.9); these results combined to effect a majority of respondents (55.6%) indicating they employed a standardization strategy for channels (Table 3).

Null Hypothesis H_{2f} was partially accepted. While the respondents for the overall sales promotion mix demonstrated a slight majority (52.8%) favoring a standardization strategy, four of the seven components of sales promotion were cited by less than 50% of respondents as embracing a standardization strategy (Table 3).

Null Hypothesis H_{2g} was rejected because for the personal selling mix, 61.2% of food company executives cited a standardization strategy and all three components of personal selling exhibited a majority of executives preferring a standardization strategy (Table 3).

Null Hypothesis H₃ was accepted since type of international involvement did not emerge as a significant factor in determining whether a standardization or adaptation strategy was employed ($\chi^2 = .03$, 1 df, p = .99) (Table 5).

Null Hypothesis H₄ was accepted because whether or not foreign markets served had similar characteristics to the companies' domestic markets was not found to be a predictor of whether they would employ a standardization or adaptation strategy ($\chi^2 = .04$, 2 df, p = .95) (Table 5).

Null Hypothesis H₅ was rejected because companies with higher percentages of international sales to total sales were more likely to be employing a standardization strategy than were those with a lower percentage of international sales to total sales ($\chi^2 = 3.90$, df = 1, p = .05). (Table 5).

Null Hypothesis H₆ was accepted because years of international experience was not found to be a statistically significant determinant of whether the respondent companies would be employing a standardization or adaptation strategy ($\chi^2 = .22$, df = 1, p = .70) (Table 5).

Null Hypothesis H₇ was accepted because company size did not turn out to be a statistically significant determinant as to whether the respondent companies were pursuing a standardization or adaptation strategy ($\chi^2 = .10$, 1 df, p = .80) (Table 5).

Null Hypothesis H₈ was accepted because the number of foreign countries in which the respondent food companies operated was not found to be a statistically significant determinant of whether they were employing a standardization or adaptation strategy ($\chi^2 = .05$, 1 df, p = .90). (Table 5).

In order for null hypotheses H₉-H₁₆ to be accepted, less than 50% of the respondents had to answer "very important." Null Hypothesis H₉ was rejected because 60.4% of the respondent executives believed that laws and regulations were a "very important" determinant of their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₀ was rejected because 74.5% of the companies believed that competition in international markets was a "very important" factor in their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₁ was accepted; only 23.7% of the sampled executives believed that physical infrastructure was "very important" in developing their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₂ was accepted because a decided minority (28.7%) of the food-company executives felt that marketing infrastructure was "very important" in framing their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₃ was rejected because a majority (51.7%) of the sampled executives stated that cultural dimensions of international markets were "very important" in developing their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₄ was accepted. Less than two-fifths (39.5%) of the respondents cited the desire to obtain economies of scale as a "very important" factor in shaping their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₅ was rejected because a majority (71.2%) of the food-company respondents believed that availability of resources was a "very important" factor in determining their standardization/adaptation strategy (Table 6).

Null Hypothesis H₁₆ was rejected. Over four-fifths (84.3) of the food company executives who took part in this study stated that needs and wants of consumers were “very important” in developing their standardization/adaptation strategy (Table 6).

Table 6 contains nine variables that the authors believed to be potentially important in explaining companies’ standardization/adaptation strategies but were not stated as hypotheses because the literature was either equivocal about them or was non-existent. Physical distance of international markets from companies’ domestic locations (22.7% of respondents), U.S. government regulations which affect international operations (42.1%), availability and nature of U.S. government export assistance and information programs (15.6%), and tax considerations (33.8%) emerged as relatively insignificant factors since less than half of the respondents identified them as being “very important.” On the other hand, five factors--economic conditions in foreign markets (70.1%), companies’ strategic goals and objectives (80.4%), attitudes and orientations of top management (73.9%), companies’ financial condition (59.5%), and availability of competent personnel to staff your company’s international marketing positions (68.0%) were considered to be significant factors because a majority indicated they were very important.

Eleven of the 17 factors contained in Table 6 were external to the firm; six were internal in nature. The respondent firms assigned a much higher mean score ($x=65.4$) of “very important” responses to the internal factors than they did to the external ones ($x=46.2$).

Discussion

Unlike much of the previous work on standardization/adaptation, a comprehensive number of marketing mix variables was examined in this study, multiple international markets were included, a large number of potentially explanatory variables was explored, and a single SIC industry was the focus.

Despite these strengths, however, many of the hypotheses tested could not be accepted. This is not to diminish the contributions of this study because the findings call into question some of the prior assumptions about the standardization/adaptation decision and suggest that there is much additional work to be done until we have a true and full understanding of the most important strategic decision with which companies marketing their products and services overseas must grapple.

Perhaps the most unanticipated finding was that the international marketing mixes of these food companies were standardized, not adapted, as they were assumed to be in the previous literature. Although the respondent companies put a great deal of emphasis on needs and wants of consumers in international markets and also, although to a lesser extent, on the cultural dimensions existing in those markets, several other dimensions which may have run counter to these were also viewed as being important and may explain these companies’ preferences for standardized strategies. These include competitors in international markets and economic conditions there (both might have forced these firms to compete on a price basis which would be better achieved through lower costs resulting from a standardization approach), strategic goals and objectives (such as to be the low-cost producer, have a high profit margin in international markets, etc.), companies’ financial conditions (they could not afford to pursue the higher-cost adaptation course), attitudes and orientation of top management (standardization was favored because it could be implemented more quickly and at lower cost than could the adaptation strategy), availability of resources (they were not sufficient to justify the higher investment costs

associated with an adaptation strategy), and availability of competent personnel to staff international marketing positions (they were not perceived as being capable to come up with effectively different ways of marketing their companies' products as required in an adaptive strategy).

The fact that these respondent companies' product mixes exhibited a strong standardization pattern, instead of the expected adaptation configuration, may be explained by the fact that the cost of producing products is usually the largest of all costs incurred by most food companies, often approaching 70%-80% of revenues. Thus, it may very well be that these companies' executives believe that the cost savings brought about by a standardized product mix would exceed the revenues lost by not tailoring their products for different international markets, thus culminating in higher profits from a standardization strategy than an adaptive one.

A logical starting point for companies making marketing mix decisions is to develop the product mix, then configure the place, promotion and pricing mixes since these are strongly defined by the type of product. We suspect that this scenario is no different for products sold overseas than those sold exclusively in domestic markets. Thus, it very well could be that the executives participating in this study believe that the place, promotion and pricing mixes need to reflect the product mix in order for the food products sold overseas to present a unified strategy. Or, another possibility is that standardized marketing mixes predominate because executives feel that they will enable their products to get more quickly and at lower cost into foreign markets than if they took the additional time and incurred the incremental expense of implementing an adaptation strategy. Another likely explanation is that they perceived the marketing mixes deployed in their domestic markets to be effective, so why rock the boat by changing them for international markets?

Some of the major factors previous researchers postulated to be associated with standardization/adaptation were found in this study to have had little impact on this most important decision for companies marketing their product overseas. As such, these findings call into question some of the previous results which had achieved a high level of consensus. These include (1) the notions that companies at the "early" stages of internationalization (exporting, licensing or franchising) are more likely to be pursuing a standardized strategy than those operating overseas via the "later" stages of marketing/sales offices and overseas manufacturing facilities, (2) a standardized strategy was more likely to be employed in markets similar to domestic markets than it would be in dissimilar markets, (3) companies with more years of international experience would be more likely to employ an adaptation strategy than those with fewer years of international experience and (4) larger companies would be more prone than smaller ones to be pursuing a standardized strategy.

What are the possible justifications for these contradictory findings? Exporting, licensing and franchising involve the utilization of entities external to the international firm (agents, distributors, licensees, and franchisees) that are located in foreign markets and may press for marketing efforts that recognize cultural and economic differences in these markets. Executives may have decided that a standardization strategy should be employed in all foreign markets regardless of their similarity or dissimilarity to the domestic market. Firms with greater years of international experience may eschew an adaptation strategy for a variety of reasons, such as, they do not want to decrease international profit margins by instituting a higher cost adaptation strategy. The idea that larger companies would favor a standardized strategy has always seemed tenuous to the authors; an apparent counter argument is that larger companies are in a better financial position than smaller ones to employ an adaptation strategy.

Several factors generally considered to be important determinants of standardization/adaptation decisions were, surprisingly, believed to be inconsequential by these food company respondents. These include physical distance of international markets from companies' domestic locations, physical infrastructure, marketing infrastructure, and availability of U.S. government export assistance and information programs.

Physical distance may be considered unimportant because of the kinds of products the respondents' firms product and market. If food products with long shelf lives are involved, the distance required to reach international markets may be dismissed. On the other hand, if shipping products that have short shelf lives is involved, firms may be resigned to incur the higher transportation charges needed to ship by air. The significance of physical infrastructure may be minimized by these firms because they have turned over the internal physical movement and storage of their products to local distributors or transportation companies. Marketing infrastructure may have been downplayed by the respondent companies due to the relative long times most of them have been engaged in international marketing; they have had plenty of time to develop a marketing infrastructure they feel is effective--they are thus not interested in changing it—and so the significance of marketing infrastructure is diminished. The vulnerability of these firms' international operations may also explain their lack of concern about U.S. government assistance and information programs; they may perceive these efforts as only applying to companies just beginning to market internationally, not to those which have been doing so for years or are considering expansion into additional markets.

What might explain the respondents' belief that internal variables are most important in making standardization/adaptation decisions than external ones? One possibility is that the respondent executives realized that there was little they could do except recognize and respond to the external variables, but they could exert much greater levels of control over the internal ones.

The results of this study did not validate a number of significant and supposedly highly tenable hypotheses concerning the major decision companies plying international waters must make: whether to use the same marketing strategies in international markets as employed in domestic ones (standardization) or operate in foreign markets with a different set of strategies that are being employed in the domestic market (adaptation). What this research did confirm, on the other hand, is that the standardization/adaptation literature is rife with contradictory findings, leaving academicians and practitioners alike groping for a consensus that will result in more appropriate strategies being instituted by firms either beginning to operate internationally or expanding such operations into additional overseas markets.

It is, of course, almost a cliché to suggest that more research on the standardization/adaptation construct be conducted. But, if any aspect of international marketing requires such an effort, it is this one. The previous research on this topic appears to frequently ignore much of the preceding work. Other research inadequacies involve the different kinds of products and foreign markets studied, the varying type and number of marketing mix variables analyzed, the wide array of independent variables examined, and the different time periods involved. All of these help to explain the paucity of replicative studies on this construct that are so vitally needed if generalizations which can be relied upon can be developed.

A longitudinal study of the *same companies'* standardization/adaptation configurations and the variables affecting these when they first decide to enter international markets and how they are modified over a ten-year period would be a significant contribution to the standardization/adaptation literature. In order to obtain valid information, we recommend a combination mail survey and personal interviews with key decision makers. Our review of the

literature uncovered only one longitudinal study (Boddewyn, Soehl and Picard 1986) on this topic, but its methodological flaws—inability to obtain answers from the same companies, different data-gathering methods (personal interviews vs. mail) and some companies reporting actual, current practices while others gave future projections—suggest that a tightly controlled longitudinal study of the type recommended is urgently needed to enable academicians and practitioners alike to better understand the standardization/adaptation construct.

Whether longitudinal or cross-sectional studies are done on this topic in the future, it is strongly urged that researchers use more finite product categories because within gross product categories, vastly different international marketing strategies may be required. Pertinent to this study, we realized that this may be the case for such widely different food products as fresh fruit and vegetables, snacks, commodities like raw sugar cane, and products from meat packing plants.

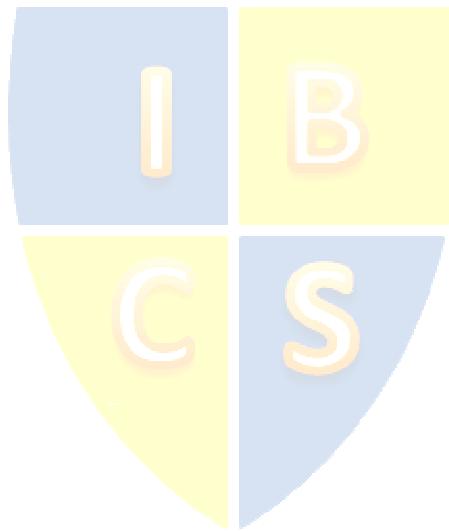


Table 1
Internal and External Factors Affecting the
Standardization/Adaptation Decision

<u>Internal Factors</u>	<u>External Factors</u>
Company Objectives	Competition (Bodewyn, Soehl and Picard 1986; Chung 2002; Jain 1989; Theodosiou and Leonidou 2003)
Economies of Scale (Barker and Aydin 1991; Carpano and Chrisman 1995; Levitt 1983; Schuh 2000; Whitelock and Pimlett 1997; Yip 1996)	Host-Country Variables
Cost Reduction or Sales Increases (Barker and Aydin 1991; Buzzell 1968; Levitt 1983; Whitelock and Pimlett 1997)	Physical Infrastructure (Barker and Aydin 1991)
Levitt	Marketing Infrastructure (Akaah 1991; 1983; Peebles, Ryans and Vernon 1978; Schuh 2000)
Operations	
Centralization/Decentralization (Chakravarthy and Perlmutter 1995)	Regulations, Laws and Tariffs (Buzzell 1965; Schuh 2000; Yorio 1983)
Decision-Making Orientation (Albaum and Tse 2001; Solberg 2002)	B Climate, Topography, Resources (Buzzell 1968)
Foreign Market Entry Strategies (Barker and Aydin 1991; Cavusgil and Kirpalani 1993; Griffith, Chandra and Ryans 2003; Grosse and Zinn 1990)	S International Markets Size (Yip 1989)
Marketing Mix (Schuh 200)	Culture (Dunn 1976; Killough 1978; Tse, Pan and Au; Whitelock and Pimlett 1997; Yorio 1983)
Locus of Value Added Activities (Chakravarthy and Perlmutter 1985)	Needs and Desires in International Markets (Barker and Aydin; Carpano and Chrisman 1995; Chrisman and Roth 1994; Martenson 1987; Samiee and Roth 1994)
Number of Foreign Markets in which Products Are Sold (Walters 1986)	Willingness to Trade Off Personal Preferences for Lower Prices and Higher Quality (Levitt 1983; Segal-Horn 1996)
Years of International Experience (Cavusgil and Zou 1994)	
Products Marketed Internationally	Similarity of Needs In Foreign markets to Those in Domestic Markets (Carpano and Chrisman 1995; Griffith, Chandra and Ryans 2003; Theodosiou and Leonidou 2003)
Type (Consumer Durables, Consumer Non-Durables, Industrial) (Hill and Still 1984; Sorenson and Wiechmann 1975; Whitelock and Pimlett 1997)	Standard of Living (Barker and Aydin 1991; Bodewyn, Soehl and Picard 1996)
Level of Technicality (Cavusgil and Zou 1994; Segal-Horn 1996)	
Performance	

Size of Company (Sorenson and Weichmann
1975; Yip 1996)

Percentage of Export Sales to Total Sales
(Cavusgil and Zou 1994)

Profitability (Yorio 1983)

Level of Resources (Yorio 1983)

Table 2
Profile Data of Respondent Companies
(N=154)

<u>Item</u>	<u>RESULT</u>	
Median Annual Sales	\$460 million	
Median Percentage of Annual Sales Derived From International Operations	30%	
Median Years of International Experience	20	
Type of International Operation ¹		
Exporting	142	(92.2%)
Licensing	64	(41.6%)
Franchising	15	(9.7%)
Overseas Sales/Marketing office	119	(77.3%)
Overseas manufacturing Facility	107	(69.5%)
TOTAL	447	
Location of International Operations ¹		
Canada	131	(85.1%)
Mexico	106	(68.8%)
Central America	46	(29.9%)
South America	87	(56.5%)
Europe	131	(85.1%)
Middle East	51	(33.1%)
Africa	45	(29.2%)
Asia	119	(77.3%)
Median Number of Foreign Countries in Which Company Has Operations	12	

¹ Respondents could indicate more than one option.

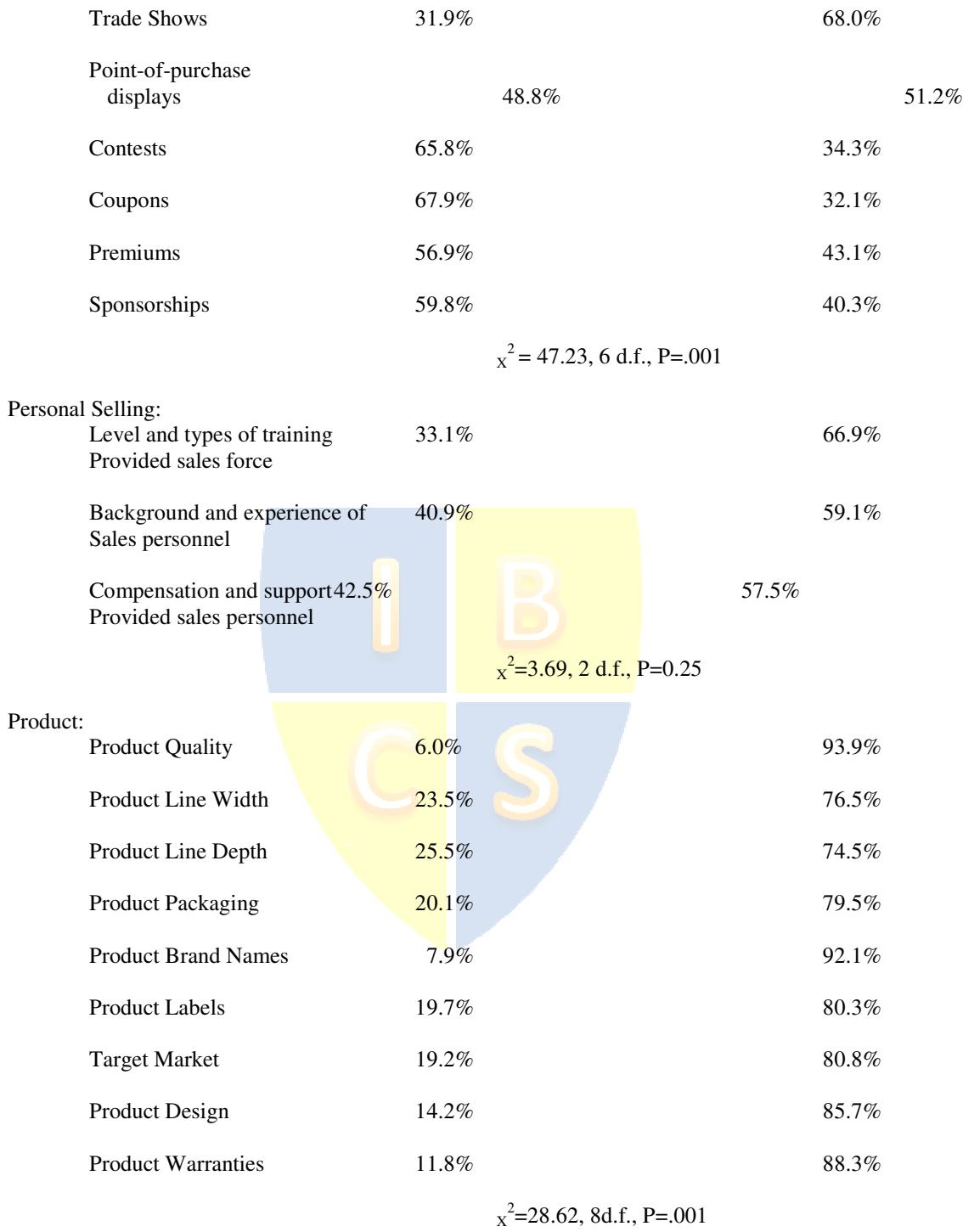
Table 3
Percentage of Respondent Companies with Standardization
Or Adaptation Marketing Mix Strategies

	<u>N</u>	<u>Adaptation</u>	<u>Standardization</u>
1. Advertising copy	148	53.4%	46.7%
2. Advertising appeal	141	47.6%	52.5%
3. Advertising media	141	44.7%	55.3%
Total Advertising	430	48.6%	51.4%
4. Sampling	119	29.4%	70.6%
5. Trade Shows	144	31.9%	68.0%
6. Point-of-purchase displays	84	48.8%	51.2%
7. Contests	76	65.8%	34.3%
8. Coupons	56	67.9%	32.1%
9. Premiums	72	56.9%	43.1%
10. Sponsorships	72	59.85	40.3%
Total Sales Promotion	623	47.2%	52.8%
11. Level and type of training provided sales force	148	33.1%	66.9%
12. Background and experience of sales personnel	149	40.9%	59.1%
13. Compensation and support provided sales Personnel	146	42.5%	57.5%
Total Personal Selling	443	38.8%	61.2%
Total Promotion	1496	45.1%	54.9%
14. Product quality	149	6.0%	93.9%
15. Product line width	149	23.5%	76.5%
16. Product line depth	149	25.5%	74.5%
17. Product packaging	139	20.1%	79.8%
18. Product brand names	139	7.9%	92.1%
19. Product labels	132	19.7%	80.3%

	<u>N</u>	<u>Adaptation</u>	<u>Standardization</u>
20. Target market segments for product	145	19.2%	80.8%
21. Product design	147	14.2%	85.7%
22. Product warranties	145	11.8%	88.3%
Total Product	1294	16.4%	83.6%
23. Types of channels of distribution used	145	42.0%	57.9%
24. Incentives provided channels to carry our Products and aggressively market them	121	47.1%	52.9%
Total Channels	266	44.3%	55.6%
25. Transportation modes	144	45.8%	54.1%
26. Order cycles length	148	43.2%	56.8%
27. Inventory policies	143	39.2%	60.9%
28. Warehousing strategies	140	50.7%	49.3%
Total Logistics	575	44.7%	55.3%
Total Distribution	841	44.6%	55.4%
29. Prices	151	51.0%	49.0%
30. Pricing objectives	148	38.5%	61.5%
31. Dealer margins	122	44.2%	55.7%
Total Pricing	421	44.7%	55.3%
32. Customer service	148	29.7%	70.3%
Total All Areas	4201	35.6%	64.4%

Table 4
**Extent to Which Levels of Standardization and Adaptation of
 Respondent Companies Marketing Mixes Are Similar or Different**

<u>Within First-Level Marketing Mix Elements</u>		
	Percentage of Companies With an <u>Adaptation Strategy</u>	Percentage of Companies With a <u>Standardization Strategy</u>
Promotion	45.1	54.9
Product	16.4	83.6
Distribution	44.6	55.4
Pricing	44.7	55.3
Customer Service		$\chi^2 = 312.56, 4 \text{ d.f., } P=.001$
<u>Within Second-Level Marketing Mix Elements</u>		
Promotion:		
Advertising	48.6	51.4
Sales Promotion	47.2	52.8
Personal Selling	38.8	61.2
		$\chi^2 = 10.35, 2 \text{ d.f., } P=0.99$
Distribution:		
Channels	44.3%	5.6%
Logistics	44.7%	55.3%
		$\chi^2 = .02, 1 \text{ d.f., } P=0.99$
<u>Within Third-Level Marketing Mix Elements</u>		
Advertising:		
Advertising Copy	53.4%	46.7%
Advertising Appeal	47.6%	52.5%
Advertising Medium	44.7%	55.3%
		$\chi^2 = 2.25, 2 \text{ d.f., } P=0.25$
Sales Promotion:		
Sampling	29.4%	70.6%



Channels of Distribution:

Types of Channels of Distribution Used	42.0%	57.9%
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Incentives Provided Channels to Carry our Products and Aggressively Market Them	47.1%	52.9%
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$\chi^2=0.75$, 1 d.f., P=0.50

Logistics:

Transportation Modes	45.8%	54.1%
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Order Cycle Lengths	43.2%	56.8%
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Inventory Policies	39.2%	60.9%
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Warehouse Strategies	50.7%	49.3%
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$\chi^2=3.88$, 3 d.f., P=0.50

Pricing:

Prices	51.0%	49.0%
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Pricing Objectives	38.5%	61.5%
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Dealer Margins	44.2%	55.7%
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$\chi^2=4.89$, 2 d.f., P=0.10

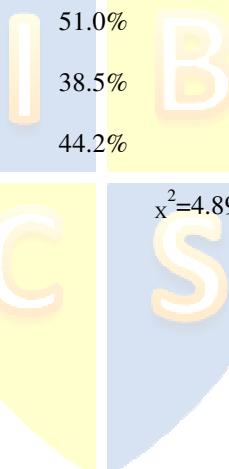


Table 5 - Effect of Various Factors on Standardization/Adaptation Decision

<u>Factor</u>	<u>Percentage of Companies with an Adaptations Strategy</u>	<u>Percentage of Companies with a Standardization Strategy</u>
Type of International Involvement		
Exporting and Licensing/Franchising Overseas	38.4	61.6
Sales/Marketing Office and Overseas Manufacturing Facility	38.2	61.8
	$\chi^2 = .03, 1 \text{ d.f., } P = 0.99$	
Location of International Operations		
Canada and Europe	38.1	61.9
Mexico, Central/South America, Middle East/Africa, and Asia	38.3	61.7
	$\chi^2 = .04, 1 \text{ d.f., } P = 0.95$	
Percentage of Total Sales Represented By International Sales		
<30%	52.5	57.5
>30%	32.2	67.8
	$\chi^2 = 3.90, 1 \text{ d.f., } P = 0.05$	
Years of International Experience		
<20 years	38.3	61.7
>20 years	36.5	63.5
	$\chi^2 = 22, 1 \text{ d.f., } P = 0.70$	
Company Size		
Annual Sales < \$460 million	35.1	64.9
Annual Sales > \$460 million	41.0	59.0
	$\chi^2 = .10, 1 \text{ d.f., } P + 0.80$	
Number of Foreign Countries Operated In		
<12	37.9	62.1
>12	37.9	62.1
	$\chi^2 + .05, 1 \text{ d.f., } P = 0.90$	

Table 6
Percentage of Respondent Companies Indicating the Extent to Which Various Factors Affecting Their Standardization/Adaptation Strategies Were Important

	N	Percentage of Companies Indicating Not Important	Percentage of Companies Indicating Some-What Important	Percentage of Companies Indicating Very Important
1. Laws and regulations in international markets	154	4(2.6%)	57(37.0%)	93(60.4%)
2. Competition in international markets	153	6(3.9%)	33(21.6%)	114(74.5%)
3. Needs and wants of consumers in international markets	153	5(3.3%)	19(12.4%)	129(84.3%)
4. Cultural dimensions of international markets	151	7(4.6%)	66(43.7%)	78(51.7%)
5. Physical distance of international markets from your company's domestic location(s)	154	43(27.9%)	76(49.4%)	35(22.7%)
6. Physical infrastructure (roads, bridges, electrical power, etc.) in international markets	152	33(21.7%)	83(54.6%)	36(23.7%)
7. Marketing infrastructure (banks, marketing research firms, advertising agencies, telephone service, etc.) in international markets	150	29(19.3%)	78(52.9%)	43(28.7%)
8. Economic conditions in foreign markets	154	3(1.9%)	43(27.9%)	108(70.1%)
9. Your company's strategic goals and objectives	153	5(3.4%)	25(16.3%)	123(80.4%)
10. Your company's desire to obtain economies of scale	152	17(11.2%)	75(49.3%)	50(32.5%)
11. Attitudes and orientations of your company's top	153	11(7.2%)	34(22.2%)	108(70.6%)
12. Your company's financial condition	153	13(8.5%)	49(32.0%)	91(59.5%)
13. Availability of resources in your company to support its	153	5(3.3%)	39(25.5%)	109(71.2%)
14. Availability of competent personnel to staff your company's international opportunities	153	7(4.6%)	42(27.5%)	104(68.0%)
15. U.S. government regulations which affect your international operations	152	32(21.1%)	56(36.8%)	64(42.1%)
16. Availability and nature of U.S. government export assistance and information Programs	154	77(50.0%)	24(15.6%)	53(34.4%)
17. Tax considerations	154	32(20.8%)	70(45.4%)	52(33.8%)

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