

VIEWPOINT

The future is
predictable

The future is predictable for international marketers

Converging incomes lead to diverging consumer behaviour

103

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Abstract *Discusses the globalisation of markets and questions the assumption that economic development would result in the converging needs of consumers and standardisation of marketing and advertising. Claims that consumers' values are strongly rooted in history and tradition and that with the convergence of incomes, people have more freedom to express themselves and this is done through their own specific value patterns. Outlines Hofstede's five dimensions of national culture. Investigates consumer behaviour across different nationalities for a sample of products and services.*

Globalization of markets

Since the early 1960s participants in the discussion about the effects of globalization have assumed that economic development would lead to converging needs and tastes of consumers, which would, in turn, facilitate standardisation of marketing and advertising. Economies of scale in production would lead to low price/high quality ratios, which consumers were supposed to prefer over the products/brands they were used to. Without any empirical evidence, numerous statements about this effect of globalization were published in renowned US journals, such as:

In Western Europe, as in most other parts of the world, the geographic, cultural, and other "distances" are on the decline (Roostal, 1963).

The *possession* and *availability* (italics by author) of certain goods is changing people's lives into a more uniform pattern (Elinder, 1965).

Especially in Western Europe, but also in some other parts of the world, social and economic trends are working in favour of more, rather than less standardisation in marketing policies (Buzzell, 1968).

It was particularly Harvard professor Ted Levitt's (1983) article "The globalization of markets" which has been quoted ever since. Without providing empirical evidence he made statements like "The world's needs and desires have irrevocably homogenised . . . Everywhere everything gets more and more like everything else as the world's preference structure is relentlessly homogenised . . . Ancient differences in national tastes or modes of doing business disappear".

At the time, other well-known US scholars had more balanced views. Kotler (1986), for example, stated that consumer behaviour is diverse, and consumers are not rational human beings, they will not, in all cases, prefer low-priced products over the products they are used to. Sheth (1986) noted that, in fact, markets were becoming more diverse. Next to global products and brands, an increasing number of local products and brands would appear on the market.

In the discussions, economic arguments tend to prevail. One of a set of hypotheses by Jain (1989) is that “generally standardisation [of marketing programs] is most feasible in settings where marketing infrastructure is well developed. In general, standardisation is more practical in markets that are economically alike”. The underlying assumption is that economic development will lead to convergence.

Only a few scholars have pointed out that “Globalization remains mainly a belief since no empirical evidence has been brought to show homogenisation of tastes or the appearance of universal price-minded consumer segments” (Usunier, 1997). A rare case of empirical evidence demonstrates that, “rather than converging in terms of macro-environmental characteristics as hypothesised, industrialised countries are becoming more divergent” (Craig *et al.*, 1992).

A review of the debate on international advertising by Agrawal (1995) demonstrates that in the past 40 years the debate has not changed. Between the 1950s and the 1990s proponents of standardisation of marketing and advertising (mostly Americans) have assumed that the world would homogenise, while the proponents of customisation (mostly Europeans) based their opinions on assumptions that various influences, among which cultural differences, would prevent successful standardisation.

But culture to many, at best, is a “dustbin word” (Holden, 1998). If cultural differences are assumed to have an influence, culture is seen as “a convenient catchall for the many differences in market structure and behaviour that cannot readily be explained in terms of more tangible factors” (Buzzell, 1968).

Europe

International marketers would like us to believe that in the “new Europe” with a single currency, people will become more similar, will increasingly eat the same food, wear jeans and sports shoes and watch the same television programs.

Reality is different. Few people watch international (English language) television programs regularly. Understanding the English language still varies widely and few Europeans, apart from the British and the Irish, regularly watch English language television without translation or subtitles (EMS, 1996/1997).

There also remain large differences between value systems of the peoples of Europe. These differences were expected to disappear with the single European market in 1992 and they did not. They will not disappear with a single currency either. Values are strongly rooted in history and appear to be pretty stable over time.

Cultural values: stability instead of change

Although there is evidence of convergence of economic systems, there is no evidence of convergence of peoples' value systems. On the contrary, there is evidence that with converging incomes, people's habits diverge. More discretionary income will give people more freedom to express themselves and they will do that according to their own, specific value patterns.

There are four reasons why international marketing and advertising people are reluctant to accept this.

- (1) What unites marketing and advertising people worldwide is the wish for change. Change and trends, preferably every year new ones, are what the marketing and advertising world thrives on. New trends mean new business. Every self-respecting advertising agency nowadays has a trend watcher. Trend watching is big business. This preoccupation with change makes it so difficult to understand the stability of cultural values.
- (2) The origin of most global advertising agencies and many multinational companies is American/British, or they are dominated by Anglo-American management, thus, being very individualistic. Individualism implies universalism, thinking that the rest of the world is like oneself, or will become like oneself. For individualists, it is difficult to understand that others may be different, and will remain so in the foreseeable future. Their focus is on global markets, on similarities, not on the differences (Holden, 1998).
- (3) Those who preach the importance of cultural differences in the global market place do not have much empirical evidence to refer to. The few results of cross-cultural academic research trickle down too slowly.
- (4) The problem of cultural values is that they are difficult to vocalise. Cross-cultural studies which can be applied to marketing and advertising are few and far between.

In this Viewpoint, I will demonstrate that a model which distinguishes values of national culture, developed by Geert Hofstede (1991) for the purpose of intercultural management, can also be used to understand differences in consumption and consumer behaviour.

Hofstede's dimensions of national culture

Hofstede distinguishes five dimensions of national culture: power distance (PDI), individualism/collectivism (IDV), masculinity/femininity (MAS), uncertainty avoidance (UAI) and long-term orientation (LTO). For those who are unfamiliar with the model, a short description follows of four of the five dimensions relevant for this article.

Power distance is the extent to which less powerful members of a society accept that power is distributed unequally. In large power-distance cultures

everybody has his/her rightful place in society, there is respect for old age, and status is important to show power. In small power-distance cultures people try to look younger and powerful people try to look less powerful.

In *individualistic* cultures people look after themselves and their immediate family only; in *collectivist* cultures people belong to in-groups who look after them in exchange for loyalty. In individualist cultures, values are in the person, in collectivist cultures, identity is based in the social network to which one belongs. In individualist cultures there is more explicit, verbal communication, in collectivist cultures communication is more implicit.

In *masculine* cultures the dominant values are achievement and success. The dominant values in *feminine* cultures are caring for others and quality of life. In masculine cultures performance and achievement are important. Status is important to show success. Feminine cultures have a people orientation, small is beautiful and status is not so important. In masculine cultures there is large role differentiation between males and females, in feminine cultures there is small role differentiation.

Uncertainty avoidance is the extent to which people feel threatened by uncertainty and ambiguity and try to avoid these situations. In cultures of strong uncertainty avoidance, there is a need for rules and formality to structure life. Competence is a strong value resulting in belief in experts, as opposed to weak uncertainty-avoidance cultures with belief in the generalist. In weak uncertainty-avoidance cultures people tend to be more innovative and entrepreneurial.

The dimensions are measured on a scale from 0 to 100 (index), although some countries may have a score below zero or above 100, because they were measured after the original scale was defined. Original data were based on an extensive IBM database for which between 1967 and 1973, 116,000 questionnaires were used in 72 countries and in 20 languages. The results were validated against about 40 cross-cultural studies from a variety of disciplines. Hofstede gives scores for 56 countries, others have extended this to 85 countries. The combined scores for each country explain variations in behaviour of people and organisations. The scores indicate the relative differences between cultures.

Recent replications have demonstrated that Hofstede's country scores, based on findings in 1970, are still valid. A recent replication was carried out by including Hofstede's questions in the EMS (1996/1997). The country scores found in EMS were similar to those found 20 years earlier, and were particularly robust, when used single source, to explain diversity in consumption and ownership of products as measured in EMS.

Values of national culture and consumption patterns

Most of the differences in product usage and buying motives across Europe are correlated with Hofstede's dimensions. Values of national culture influence, for example, the volume of mineral water and soft drinks consumed, ownership of pets, of cars, the choice of car type, ownership of insurance, possession of

private gardens, readership of newspapers and books, TV viewing, ownership of consumer electronics and computers, usage of the Internet, sales of video-cassettes, usage of cosmetics, toiletries, deodorants and hair care products, consumption of fresh fruit, ice cream and frozen food, usage of toothpaste and numerous other products and services, fast moving consumer goods and durables. These differences are stable or become stronger over time.

The future is
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Culture's influence is persistent

This stability of cultural values is in contrast to what economists expect: that with converging incomes, cultural values and habits will also converge. The opposite is true, cultural values are stable and with converging incomes they will become more manifest. When people possess more or less enough of everything, they will spend their incremental income on what most fits their value pattern. Americans will buy more cars, the Dutch will buy more luxurious caravans and the Spanish will eat out even more than they do now.

I will demonstrate the diminishing effect of income and persistence of cultural values by correlation and step-wise regression analysis[1] using income (GNP/capita) and Hofstede's cultural variables as independent variables against data on products consumption and ownership as dependent variables. I will show that both in the fast moving consumer goods (FMCG) category and the durables category income differences have a diminishing role over time. Patterns found for different product and services categories will be useful for predicting the future. Examples to be used are: in the FMCG category, mineral water and in the durables and service category, cars and Internet usage.

Mineral water

The Belgians drink ten times as much mineral water as the British and six times as much as the Dutch, their neighbours in Europe. Although consumption of mineral water has increased everywhere in Europe, the differences between countries have been similar since 1970 or have become even stronger. In France, Germany, Italy and Belgium, of strong uncertainty avoidance, people drink increasing volumes of mineral water, as compared to the UK and Scandinavia, cultures of weak uncertainty avoidance, where people have different perceptions of what is necessary for their health. These differences cannot be explained by differences in income or quality of tap water. Correlation analysis shows that already, in 1970, the need for purity, a value included in Hofstede's dimension uncertainty avoidance, is positively related to mineral water consumption. In 1970, the correlation is significant, but not strong enough to predict differences. In 1991, the relationship becomes stronger. In 1996, the cultural variables become strong predictors. Table I shows correlation coefficients and predictors for mineral water consumption in 1970, 1991 and 1996.

Table I shows that there also is a positive relationship between mineral water drinking and the masculinity/femininity dimension. This can be

	Product moment correlations					Step-wise regression predictors
	GNP/cap	PDI	IDV	MAS	UAI	
1970	0.31	0.32	-0.21	0.24	0.46*	None
1991	0.21	0.32	-0.05	0.53*	0.57*	UAI ($R^2 = 0.32$); GNP/cap ($R^2 = 0.57$); MAS ($R^2 = 0.75$)
1996	0.04	0.56*	-0.10	0.57*	0.73***	UAI ($R^2 = 0.53$); MAS ($R^2 = 0.69$); GNP/cap ($R^2 = 0.79$)

Notes: * $p < 0.05$; *** $p = 0.005$

Sources: Hofstede (1991);

Reader's Digest (1970): drink taken in the past year: mineral spring water

Reader's Digest (1991): drinking mineral water almost every day

Euromonitor (1997): litres/cap. sales total mineral water in 1996

Table I.
Mineral water
consumption, Europe,
15 countries[2]

explained by the fact that data on total consumption of mineral water include sparkling mineral water and still mineral water. Recent data collected by EMS (1997) show that consumption of sparkling mineral water correlates positively with masculinity/femininity, as is the case with soft drinks. Soft drinks have status value. Often sparkling mineral water is used as soft drink.

Cars

How for durable products the influence of income disappears over time, while cultural factors become manifest, can be demonstrated by analysing the differences in ownership of cars over time in areas which have become economically more or less homogeneous.

In 1969, 1978 and 1989 there were very significant correlations between income and car ownership across 15 countries in Europe. There seems to be a logical relationship between ownership of durable products like cars and computers and income. But this relationship is only temporary. Initially, in the richer countries people buy more cars. The more developed a country becomes, the more cars per 1,000 population. In 1994 there is a turning point: income does not influence car ownership anymore (Table II).

There is also a cultural influence, a strong relationship between individualism and car ownership, which is persistent but becomes weaker over

	Product moment correlations					Step-wise regression predictors
	GNP/cap	PDI	IDV	MAS	UAI	
1969	0.93***	-0.24	0.74***	-0.09	-0.50*	GNP/cap ($R^2 = 0.86$); IDV ($R^2 = 0.93$)
1978	0.73***	-0.10	0.62**	0.11	-0.19	GNP/cap ($R^2 = 0.53$)
1989	0.77***	-0.16	0.62**	0.12	-0.21	GNP/cap ($R^2 = 0.59$)
1994	0.42	0.19	0.13	0.36	0.37	None

Notes: * $p = 0.05$; ** $p = 0.01$; *** $p = 0.005$

Sources: OECD Economic Surveys[3]; Hofstede (1991)

Table II.
Cars per 1,000
inhabitants, Europe, 15
countries[2]

time. In 1969 we also see a negative relationship with uncertainty avoidance. Weak uncertainty avoidance goes with innovativeness, the inclination to embrace new products. Cars at that time were a relatively new phenomenon. Weak uncertainty avoidance cultures are the early adopters of new products.

Finally, when in all countries most families own one or more cars, other cultural values influence differences in car ownership. In the masculine cultures, for example Italy, Germany and the UK, there are more families with two cars than in the feminine cultures such as The Netherlands and the Scandinavian countries. In the feminine cultures, people may think that one car is enough for the quality of life, while in the masculine cultures owning more than one car conforms to their need for status. Ownership of more than one car is a matter of status, according to the positive relationship with both masculinity and power distance (Table III).

A difference which regardless of income has been consistent during the past 30 years is whether people prefer to buy their car new or second hand. Consistently, the cultures of strong uncertainty avoidance prefer to buy their car new, while members of weak uncertainty avoidance cultures prefer buying second hand cars. And the correlations with uncertainty avoidance have remained the same (Table IV).

While some cultural differences are manifest from the start and are persistent over time, others become only manifest after the influence of income differences have disappeared.

The example is for car ownership, but similar relationships exist with respect to other durables, such as ownership of computers, use of the Internet

	Product moment correlations					Step-wise regression predictors
	GNP/cap	PDI	IDV	MAS	UAI	
1970	0.58*	-0.31	0.52*	0.43	-0.40	GNP/cap ($R^2 = 0.34$); MAS ($R^2 = 0.76$)
1997	-0.28	0.53*	0.27	0.62**	0.40	MAS ($R^2 = 0.38$); PDI ($R^2 = 0.67$); IDV ($R^2 = 0.81$)

Notes: * $p = 0.05$; ** $p = 0.01$

Sources: *Reader's Digest* (1970); EMS (1997); Hofstede (1991)

Table III.
Percent households
with two cars, Europe,
15 countries

	Product moment correlations					Step-wise regression predictors
	GNP/cap	PDI	IDV	MAS	UAI	
1970	-0.47*	0.60**	-0.45*	0.22	0.79***	UAI ($R^2 = 0.63$)
1991	-0.03	0.58*	-0.55*	0.31	0.85***	UAI ($R^2 = 0.72$)
1997	-0.32	0.57*	-0.42	0.46*	0.80***	UAI ($R^2 = 0.58$); MAS ($R^2 = 0.71$)

Notes: * $p = 0.05$; ** $p = 0.01$; *** $p = 0.005$

Sources: *Reader's Digest* (1970); *Reader's Digest* (1991); EMS (1997); Hofstede (1991)

Table IV.
Percent preferring new
cars over second hand,
Europe, 15 countries

and mobile phones. Initially, income explains differences in ownership and usage, but with converging incomes, ownership and usage diverges across cultures. Cars have been around long enough to be able to draw conclusions from the past. The Internet is a more recent example.

The Internet

The Internet has not been around long enough to be able to draw information from time series. As with other new products, it was to be expected that the early adopters would be the weak uncertainty avoidance cultures, while after some time differences in usage would be influenced by other cultural dimensions. And indeed, the countries scoring low to medium on the uncertainty avoidance index (the US, New Zealand, Australia and the Scandinavian countries), were the first to embrace the Net and still are leading with respect to usage of the Internet, while countries of strong uncertainty avoidance (e.g. Italy, France and Germany) are lagging.

In 1997, the Internet is still a communication means of the developed world. Worldwide (44 countries[4]) the number of Internet hosts per 10,000 population (World Bank, 1998/1999) correlates significantly and positively with GNP/cap and IDV and negatively with PDI and UAI. This is the configuration of dimensions of the developed world. But the predictors are income, weak uncertainty avoidance and femininity. Within the developed world, differences can be explained by the masculinity/femininity dimension.

In Europe, a more homogeneous region with respect to income and individualism, neither income nor the degree of individualism play a role. Here, it is the combination of femininity and small power distance which is the predictor for Internet usage. Femininity and small power distance is the combination of cultural dimensions representing values related to equality. And, that is what the Internet stands for: it does not allow for values related to inequality, such as status, power play, settled positions, rigid structures, authority, and the like (Table V).

The Internet can be used for different purposes: for e-mail and communication, for educational and scientific reasons, for business purposes or for leisure and other personal reasons. These differences in usage are culture

	GNP/cap	Product moment correlations			UAI	Step-wise regression predictors
		PDI	IDV	MAS		
Worldwide 44	0.66***	-0.59***	0.65***	-0.25	-0.48***	GNP/cap ($R^2 = 0.43$); UAI (-) ($R^2 = 0.52$); MAS (-) ($R^2 = 0.58$)
Europe 15	0.20	-0.45*	0.18	-0.56*	-0.47*	MAS (-) ($R^2 = 0.32$); PDI (-) ($R^2 = 0.52$)

Notes: * $p = 0.05$; *** $p = 0.005$

Sources: World Bank (1998/1999); Hofstede (1991)

Table V.
Internet hosts per
10,000 population 1997,
worldwide 44 and
Europe 15

bound. Usage for leisure, for example, appears to be linked to the degree in which people separate their work life and private life, which is culturally defined. If we look at use of the Internet almost daily for the four different purposes, findings (EMS, 1996/1997) are that the predictor for daily usage for business is small power distance, the predictor for daily usage for education and science is femininity, for usage for e-mail is weak uncertainty avoidance and the predictors for usage for leisure and personal purposes are femininity and weak uncertainty avoidance (Table VI).

Thus, after only a decade of Internet existence, in Europe, the way it is used appears to vary across cultures. These differences could have been predicted from the start.

Usage for business purposes

By understanding the equality values implicit in the Internet, it will be clear that its usage does not fit business practices of large power distance cultures. It does not fit with centralised control, unless a company finds ways to control the Internet, which will be in conflict with its basic philosophy. This explains the relatively low daily use of the Internet for business purposes in France versus high use in the UK, The Netherlands and the Scandinavian countries (EMS, 1999).

Usage for e-mail and communications

The Internet is basically an unstructured means of communications. This is more difficult to accept in cultures of strong than of weak uncertainty avoidance. The latter will be later adopters of the Internet for regular communication and mail purposes. This explains relatively low daily use of e-mail in France and Germany, as compared with the UK and Scandinavian countries (EMS, 1999).

Education/science and leisure

Education/science and leisure purposes can be pulled together with respect to the relationship with femininity. The key here is quality of life. In the feminine cultures, people do not restrict their need for quality of life to the private realm of the home. Both time spent in the home and in the office must be quality time as opposed to the masculine cultures with a more strict task orientation in working life. This is reflected in the use of Internet for leisure and personal

	Use of the Internet almost daily for:			
	Business R^2	Education/science R^2	E-mail R^2	Leisure, personal reasons R^2
PDI (-)	0.41			
MAS (-)		0.41		0.57
UAI (-)			0.49	0.71

Sources: EMS (1996/1997); InterView International (Amsterdam); Hofstede (1991)

Table VI.
Use of the Internet
almost daily for four
different purposes:
Europe 15; 1996/97

purposes in the (feminine) Scandinavian countries. This can be compared with the fact that in the feminine cultures people also tend to watch television and Teletext in the office as opposed to the masculine cultures (EMS, 1996/1997) or take work home to be able to be with the family. This also explains the relatively low penetration of home computers in Japan, high on both masculinity and uncertainty avoidance.

Thus, the Internet may indeed become more representative by introducing new carriers for it, like introducing Web technology to the television (Schlegelmilch and Sinkovics, 1998) or by offering Internet services by cell phone. By understanding the mechanisms of culture, it can be understood why, for example, the Japanese lagged behind in Internet use when it was only available via the computer. When in Japan Netphones were introduced, the cell phone became the information tool (*Business Week*, 1999, p. 41). However, before deciding to add other media to the home PC as carrier for Internet services, it is advised first to analyse culture's influence on that medium. Both usage of mobile phones and television are culture bound. Use of Teletext, for example, a verbal mode used with a visual medium, has from the start been strongly related to individualism.

Conclusion

I have tried to demonstrate that for international marketing, the future is predictable, but in a different way than generally is expected. Disappearing income differences will not cause homogenisation of needs. On the contrary, along with converging incomes, the manifestation of value differences becomes stronger. This phenomenon makes it increasingly important to understand values of national culture and their impact on consumer behaviour. This knowledge can be a powerful tool for international marketing. If it is accepted that the core values of national culture are stable and will influence both existing and future consumer behaviour, future use of innovations can be predicted. Thus, international marketing can be more efficient.

Notes

1. Correlation analysis: significance was established with the Pearson product moment correlation coefficient. Significance levels are indicated by * $p < 0.05$; ** $p < 0.01$; and *** $p < 0.005$, one-tailed. Linear regression analysis: significant contribution in stepwise regression, R^2 = share of variance explained.
2. Countries are: Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom.
3. OECD (Organisation for Economic Co-operation and Development), Economic Surveys, various years, Development Co-operation, Paris.
4. Countries are: Argentina, Australia, Austria, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, Denmark, Ecuador, El Salvador, Finland, France, Germany, Great Britain, Greece, Indonesia, India, Ireland, Israel, Italy, Japan, South-Korea, Malaysia, Mexico, The Netherlands, Norway, New Zealand, Pakistan, Panama, Peru, Philippines, Portugal, South Africa, Singapore, Spain, Sweden, Switzerland, Thailan, Turkey, Uruguay, USA, Venezuela.

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