

**To Standardize or To Localize?
Media Use and Attitudes Toward Advertising in China, Taiwan and the United States**

by

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April 22, 2005

**Paper to be presented at the *2005 American Academy
of Advertising Asia-Pacific Conference in Hong Kong*
June 1-4, 2005**

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Introduction

The Asian region is currently one of the most talked about areas for business in the world (adage.com 2003; Brown 2004; Initiative.com 2004; Madden 2004). Japan, South Korea, Singapore, Hong Kong and Taiwan are already economically and technologically strong while China and India are generating excitement over predicted economic growth and power (Green 2003; Initiative.com 2004). As American and European businesses expand into Asia, particularly China with over 1.3 billion potential consumers, advertising spending toward Asian consumers continues to also increase (Brown 2004; Madden 2004). However, little is known in the region today about consumers' attitudes towards advertising or how consumers spend their time across media.

Attitudes towards advertising in general are important to assess as they have been shown to influence attitudes toward advertisements, brands and purchase intent (Lutz 1985; MacKenzie, Lutz and Belch 1986; Mehta 2000; Mehta and Purvis 1995; Muehling 1987). As the advertising industry in the U.S. has grown over the past several decades, attitudes toward the industry have declined (Bauer and Greyser 1968; Mittal 1994; Pollay 1986; Zanot 1984) and it is important to see if similar results may occur in Asian countries where modern advertising practices are still quite young (Cheng 1996; La Ferle and Lee 2002; Tsao 1996).

These are crucial questions to understand in order to effectively reach, communicate and build connections with consumers. Even more important, the information would help advertisers to assess the potential to standardize advertising and media strategies across the region or perhaps between countries that may share similar backgrounds.

China and Taiwan are particularly interesting markets to examine in the Asian region. They have a unique relationship in that they share a similar history and culture and yet they have spent the past half of a century independent of one another (Anonymous 1996; Tsao 1996). For advertisers and marketers who are constantly looking for methods to cut costs in an ever growing global economy, the potential ability to standardize ads across a region or even in this case across these two countries is important (Banerjee 2000; Jones 2000). Businesses need to have a presence everywhere and yet limited resources only allow for some markets to receive funding for customized material (Rogowski 2004). Thus, from a financial perspective, some degree of standardization is always desirable.

From a media planner's vantage point, researching these countries is also important at this juncture with the continued fragmentation of media and audiences, as well as the explosion of users heading online from the Asian region (Bianco 2004; Lyman 2004). According to eMarketer (2003), the Asia-Pacific region houses more than half of the world's population and they predict that in a few short years, China could be the largest internet market in the world (Green 2003). However, reports have indicated that internet users are trading their TV viewing time for time spent online (UCLA World Internet Project 2004). Shifts in media behavior could greatly impact media placement strategies.

A study was therefore undertaken to provide a current picture of attitudes toward advertising across these two important and different, yet potentially similar Asian countries. The findings should help to more effectively communicate with consumers in these two countries, by assessing how consumers use media and also what their general attitudes are towards advertising. The results should also provide for the monitoring of potential changes in each of the countries as their economies and advertising industries continue to expand and change. Theoretical support

is drawn from the attitudes toward advertising literature and Hofstede's individualism / collectivism cultural dimension as well as the literature on standardization. Implications for advertisers and future research avenues are discussed.

Literature Review

Advertising Industry Overview

Although China and Taiwan share the same cultural heritage, their social and political developments and climates are quite different due to the separation that took place in 1949 (Cheng 1996; Tsao 1996). Consequently, the evolution of the advertising industry and practice also differs between these two countries. Taiwan's advertising industry exhibited rapid advancement in terms of per capita advertising spending and modernization in the 1980s (Tsao 1996). However, Taiwan's economy and advertising industry experienced a set back during the late 1990s due to a severe earthquake where advertising expenditures were reported to reach only \$1.9 billion (A.C. Nielsen 2001). Today, Taiwan is making a comeback and its advertising industry is ranked 18th in the world with advertising expenditures estimated at \$2.3 billion for 2004 (Initiative.com 2004). The top 10 global marketers in Taiwan for 2002 were Procter & Gamble Co., Unilever, Mitsubishi Motors Corp., President, Kao Corp., Wm. Wrigley Jr. Co., Motorola, Ford Motor Co., China Telecommunications Corp. and McDonald's Corp. (Adage.com 2003).

In contrast to Taiwan's advertising industry, China's advertising industry did not experience much growth until the 1990s. However, since the 1990s, the advertising industry has skyrocketed. According to various reports, 1993 was coined as "the Advertising Year in China," due to exceptional growth with a 43% rise in spending over the previous year (Cheng 1996). Today, China is now the third largest advertising economy in the world, up from sixth just four

years ago and surpassing that of Germany's advertising expenditures (Brown 2004). At the end of 2004, it was estimated that advertising expenditures in China would reach \$23 billion dollars (Brown 2004). It is further predicted that China's economy will surpass that of Japan's by 2020 (Madden 2004).

As the largest economy and advertising market in the world, predicted ad spending for 2004 in the U.S. was estimated at \$155 billion (Brown 2004). However, the United States was expected to see only a 4.9% increase in advertising expenditures in 2004. A report from Initiative suggests global growth in advertising expenditures will reach 5.8 percent during the same time period (Brown 2004).

Given China's exceptional economic growth, rapid evolution of the advertising industry from its recent beginnings in 1979 (Cheng 1996), as well as its sheer size with 1.3 billion people, localized advertising strategies may be warranted in the future. This option may also be possible for Taiwan, but it would be cheaper for advertisers if they could eventually standardize campaigns across the two countries, provided the cultural variables were similar enough for the communication to be effective.

Standardized versus Localized Advertising Strategies

The controversy over standardized strategies and advertising campaigns versus localized have haunted marketers and academics for several decades (Banerjee 2000; Duncan, and Ramaprasad 1995; Levitt 1983; Mueller 2004). Becoming popular with Levitt's (1983) famous article in the early 80s, many companies took the position that viewed advances in technology and communication as leading to a homogenized group of global consumers. It was believed that consumers around the world could be reached with similar products and messages because people's needs and values were converging. While current trends seem to demonstrate an

appreciation for the benefits of localized flexibility (Jones 2000; Rogers 2003), many marketers still strive for the potential savings from campaigns that attempt to reach global consumers with one message and strategy. Others argue that one message is not enough to effectively make a connection with consumers (de Mooij 1998, 2004; Tharp 2001). In particular, while it may be true that people from different cultures may share similar values and needs such as the need to eat, the way they express their needs can differ greatly (De Mooij 1998).

Over the past decade, marketers have recognized that it really is not about an either/or strategy regarding standardization and localization. It is more about degree and decisions will vary by product category, consumer preferences, the market environment and so on (Frith and Mueller 2004; Mueller 2004). In 2003, McDonald's launched the "I'm Lovin' It" campaign. It was the company's first global marketing campaign made in 12 languages and airing in more than 110 countries (MacArthur 2003). The intent of the campaign was to create a consistent global brand image, while also allowing for local cultures to be represented. Achieving the local flare was undertaken by creating new packaging with pictures of people from around the world as well as providing for local and regional promotional efforts (Rogers 2003).

Although the name for this type of strategy has varied across the literature, the goal is the same. The intent is to develop global strategies and brand images with local executions in order to create an optimal balance between the benefits of both localized and standardized strategies (Mueller 2004). Thus, if advertisers could find similar cultural values, advertising attitudes and media use patterns across China and Taiwan, it may be more cost effective to use a campaign with a more standardized approach.

Cultural Dimensions: Collectivism and Individualism

Since Hofstede (1984, 1994) first demonstrated how the constructs of individualism and collectivism can be characterized in people's social perceptions and behavior, a great many studies have been undertaken to assess the influence of this dimension on a variety of marketing phenomena (Han and Shavitt 1994; Lin 2001; La Ferle, Edwards and Mizuno 2002; SØndergaard 1994). The individualism-collectivism dimension refers to the level of importance placed on the self versus the group (Hofstede 1997). The United States has been found to be the most individualistic culture in the world with an index of 91. In contrast, Asian cultures have tended to be considered more collectivistic where building harmony among group members and relationships with people in one's group are highly valued (de Mooij 1998). Taiwan's index score on Hofstede's (1997) scale is 17, while China's has been found to be 20 (de Mooij 2004).

Of Hofstede's (1997) five dimensions, the individualism-collectivism dimension has been used the most in cross-cultural research. It has shown the most explanatory success from research using content analyses of advertising to influences on the diffusion of innovations (Han and Shavitt 1994; La Ferle, Edwards and Mizuno 2002; Mueller 1987; SØndergaard 1994). As an example, Lin (2001) assessed advertising themes in China, a collectivist culture and found depictions of self in relation to others as well as group consensus appeals. La Ferle, Edwards and Mizuno (2002) were able to explain 43% of the variance on internet adoption across 50 countries based on the individualism-collectivism dimension.

Given the histories of Taiwan and China, as well as Hofstede's (1997) scores for these countries, we might assume they are more representative of similar cultures and thus have similar preferences for advertising. Yet, economically the two countries have taken very different paths and the advertising industries are at different stages with different histories. Therefore, we

cannot be sure as to where consumers in these two countries lie today on the Individualism and Collectivism scale, in relation to each other nor to the United States. This information is crucial for advertisers who may consider a larger degree of standardization if these two countries are similar versus if they are different.

The choice to follow a more standardized or localized strategy can have a huge impact on consumer reactions to advertising as well as to the industry as whole. Several American multinational firms have been accused of pushing western values on Asian, European and Third world markets where western values are said to be encouraged and reinforced through standardized advertising campaigns (Cutler, Javalgi and White 1995; Frith and Mueller 2003; Lin 2001). Thus it is important to consider these issues when selecting the degree of standardization versus localization and also to monitor trends in attitudes toward advertising in general. Using standardized ads when deemed culturally appropriate may help to avoid the growth of negative attitudes toward the practice and advertising in general.

Attitudes Toward Advertising in General

In light of advertisers desires to save money by standardizing strategies as well as the rapid development of advertising in China, it is necessary to assess reactions toward the practice of advertising. This is a particularly important area for research if we consider that numerous American studies have indicated how attitudes toward advertising can influence attitudes toward advertisements, and subsequently brand attitudes and purchase intentions (Lutz, 1985; MacKenzie, Lutz, and Belch, 1986; Mehta and Purvis, 1995). It is also important to see how attitudes in China may be similar or might differ from those in Taiwan as well as those held by Americans.

In a study involving international students, Pierce (1971) examined the relationship between the stage of economic development of a country and attitudes toward advertising. He found an inverse relationship to exist, where those students from less developed countries had more favorable attitudes toward the practice of advertising. From these results we may speculate that consumers from China may hold more favorable attitudes toward advertising because they have been the newest country to develop in comparison to Taiwan and the United States. This is exactly what La Ferle and Lee (2002) found in a study that assessed attitudes towards advertising across S. Koreans, Chinese, Taiwanese and Americans in 1996. Chinese respondents were found to have the most favorable overall attitudes towards advertising in comparison to all other groups.

However, China's advertising industry is now the third largest in the world, surpassed only by the U.S. and Japan. Taiwan is currently ranked in 18th position (initiative.com 2004). Multinational firms have increased penetration in China over the past seven years and the use of westernized advertising practices has also increased (Lin 2001). It is unclear if respondents in China may still hold the most favorable attitudes towards advertising and whether they would be significantly more favorable than Taiwan or consumers from the United States. Understanding these attitudes and the similarities or differences between China and Taiwan can be helpful for standardization decisions as well as gauging trends in the industry. It is also good to recognize the valence of these attitudes in terms of their potential influence on attitudes toward specific advertisements.

The Asian region is economically strong with huge growth potential as many emerging countries with large populations continue to enter into the global marketplace. China and Taiwan share similar histories and cultures and yet on the other hand they have been separate countries

for over half a decade with different economic conditions and advertising industries. Therefore it is important to understand how consumers from these two countries view advertising as an industry now and how countries in the region may view advertising in the future. It is also important to see any similarities or differences in media use patterns as well as on Hofstede's Individualism/Collectivism dimension. The degree of standardized versus localized advertising strategies can then be better assessed when trying to reach these two markets in the future.

Therefore, the following three research questions were examined:

- RQ1: What is the relationship between country-of-origin and individualism and collectivism?
- RQ2: What is the relationship between country-of-origin and attitudes towards advertising?
- RQ3: What is the relationship between country-of-origin and media use?

The Study

A study spanning three countries was undertaken in 2003. Consumers in mainland China, Taiwan, and the United States were surveyed. The goal of the research was to examine the feasibility of using more standardized advertising strategies between Chinese and Taiwanese markets. The cultural dimensions of individualism and collectivism were measured to assess cultural similarities or differences on this important advertising dimension. Attitudes towards advertising were also assessed to see where the countries stood in relation to each other on this variable and in comparison to the United States. Finally, the study was designed to present a picture of media use patterns, particularly time spent online, to see how these patterns may vary by country. As in any cross-cultural study, necessary adjustments in terms of instrument development, sampling and data collection needed to be made in order to achieve equivalent comparisons.

Method

Research Instrument Development

A survey questionnaire was developed to investigate the key constructs of media usage, attitude toward advertising and cultural orientation. As the independent variable, country-of-origin was determined by the selection of representative countries to be included in the study: China, Taiwan and the United States. Since Asian countries are generally characterized as collectivistic while the United States is considered an individualistic culture, it was judged appropriate that these countries be included in the study (Hofstede 1997).

Given the cross-cultural nature of the study, the questionnaire was first developed in English and then went through the process of translation and back-translation with English, traditional Chinese (Taiwan) and simplified Chinese (China). This way, instrument equivalence could be achieved.

Sampling and Data Collection

Convenience sampling was employed in all three countries. In China and Taiwan, data collection took place in the metropolitan city of Beijing (China) and Taipei (Taiwan), respectively. Interviewers approached prospective respondents in popular shopping and entertainment areas. Once consent was granted, respondents completed the brief survey in a self-administered manner. Interviewers were available to answer questions if needed. In the United States, data collection was carried out online and respondents who voluntarily participated were promised entry into a cash drawing. The online survey was conducted using an online panel service consisting of approximately 10,000 members. The panel population is very similar to the demographics reported for online populations. Data collection in all three countries took place in November to December of 2003.

Independent and Dependent Variables

The independent variable of interest was country of origin. Countries in the current study included China, Taiwan, and the United States. Collectivism and individualism were dependent variables. Collectivism and Individualism refer to the degree that people of a culture are inclined towards group goals and harmony over individual goals (Hofstede 1997). Both constructs were measured using three items adapted from Triandis and Gelfand (1998)'s work and were measured on seven point scales anchored with strongly disagree to strongly agree. Collectivism was measured using items such as, "To me, pleasure is spending time with others," and was shown to be reliable ($\alpha=.70$). Individualism was measured using items such as, "I often do my own thing," but was found to be less reliable ($\alpha=.56$). However, as Nunnally (1967) has pointed out, an alpha value between .5 and .6 can be considered reliable for preliminary research needs.

Attitude toward advertising in general was defined as people's predisposition to either favorably or unfavorably respond to advertising in general (Bauer and Greyser 1968; Muehling 1987). This construct was measured with a seven point, three item semantic differential scale adapted from Lutz, MacKenzie and Belch (1983) with the following word pairs: good/bad, unfavorable/favorable, negative/positive. The scale was shown to be reliable ($\alpha=.95$). Ordinal categories of media use were used to capture time spent with radio, television, newspapers, magazines, and the internet. Categories ranged from "did not use" to "more than 5 hours per day."

The final section of the questionnaire was on demographic information. Five questions were used to find out about respondents' level of education, age, marital status, income and gender.

The Sample

The sample consisted of Chinese (22.9%), Taiwanese (23.6%) and American (53.5%) men (52.5%) and women (47.5%). The respondents represented ages from less than 15 to over 70 years of age and almost 89% had at least some college education. Marital status of the respondents was split relatively evenly between those who were single (48.3%) and those who were married (43.5%). The remaining respondents reported some other type of living arrangement. Most (58.2%) reported working full-time, followed by those indicating they were students (24.8%), the unemployed (9.9%), and those working part-time (7.2%).

Results

In order to investigate our first two research questions, a series of ANOVAs were run (see Table 1). To determine if there were differences between the three countries on the respondents' levels of individualism, collectivism, and attitudes toward advertising in general each dependent variable was tested separately. As expected, United States respondents rated themselves as more individualistic ($\xi=5.28$) than those from either China ($\xi=4.71$) or Taiwan ($\xi=4.61$), $F_{(2, 1972)}=85.59$ $p<.001$. There were no significant differences between Chinese and Taiwanese respondents regarding their level of individualism. Again following expectations, Taiwanese respondents ($\xi=5.99$) and Chinese respondents ($\xi=5.92$) both rated themselves as more collectivist than United States respondents ($\xi=5.03$), $F_{(2, 1972)}=201.06$ $p<.001$. Again, however, there was no difference between Chinese and Taiwanese respondents. Both Chinese respondents ($\xi=3.94$) and Taiwanese respondents ($\xi=3.91$) were more positive toward advertising in general than were U.S. respondents ($\xi=3.31$), $F_{(2, 2021)}=100.27$, $p<.001$. Again, there was no difference between Chinese and Taiwanese respondents.

Our third research question sought to explore media use by country to determine the most promising medium for advertising placement. To examine media use, a series of chi-square tests were run for each medium by country. Results showed significant differences for each medium. Chinese respondents reported the greatest percentage of people (33.5%) who listened to the radio two or more hours per day, followed by U.S. respondents (26.4%) and Taiwanese respondents (17.1%), $\chi^2_{(12)}=200.47$, $p<.001$. Use of television also revealed differences among the countries. The United States reported the greatest amount of viewers using television for two or more hours per day (47.8%) followed by Taiwan (37.5%), and China (23.6%), $\chi^2_{(12)}=285.17$, $p<.001$.

When examining newspaper consumption, both Taiwanese and Chinese respondents reported greater use than did U.S. respondents. A significantly greater percentage of Taiwanese (91.1%) and Chinese (90.3%) respondents reported reading the newspaper, for between one and two hours, than did U.S. respondents (64.1%), $\chi^2_{(12)}=381.54$, $p<.001$. In fact, all Chinese and Taiwanese respondents reported reading the newspaper. This was in contrast to the 30.4% of Americans who reported no daily newspaper use whatsoever. Daily magazine readership was more balanced across the three countries, with most respondents from all three countries reading magazines less than hour per day. However, U.S. respondents reported no magazine consumption (26.5%) in contrast to Chinese and Taiwanese respondents who all reported reading magazines on a daily basis, $\chi^2_{(12)}=337.56$, $p<.001$.

Finally, web use was examined and found to be relatively similar across countries. Taiwanese (56.3%), Chinese (55.6%), and American (51.2%) respondents each reported using the internet between one and four hours per day. However, the U.S. was shown to have a greater percentage of internet users surfing five or more hours per day (21.3%), followed by China (14.2%) and Taiwan (11.7%), $\chi^2_{(12)}=48.68$, $p<.001$.

Overall, these findings seem to indicate a relatively consistent pattern of media use between the different countries' respondents. China and Taiwan seem to be similar to each other, but different from the U.S. in the use of newspapers, magazines and the internet. Respondents from China and Taiwan were more likely to read either newspapers or magazines, but were less likely to be heavy users of the internet (5 hours or more per day). However, China and Taiwan were different from each other with respect to radio and television. Chinese respondents listened to more radio than either Americans or Taiwanese, but Taiwanese watched more television than did Chinese respondents.

Discussion

China and Taiwan are two major countries in the future growth of the world economy. With 1.3 billion consumers in China and a growing middle class, marketers want to communicate effectively with this market. Taiwan is also an attractive target market, yet because of its relative size (22.7 million), market share and revenue generation may not warrant customized advertising campaigns (Rogowski 2004). Therefore, a study was undertaken to examine the possibility of creating more standardized oriented advertising strategies that could be used across China and Taiwan.

In particular, cultural similarities were assessed by examining Hofstede's individualism and collectivism measures. Attitudes towards advertising were also assessed for the two countries and in comparison with the United States. Finally, media use patterns across radio, television, newspapers, magazines and the internet were measured. Overall, the findings indicate several similarities between China and Taiwan across the relevant variables with the most differences occurring between the United States and these two Asian region countries.

In line with Hofstede's (1997) indices, Americans were found to be more individualistic than both Chinese and Taiwanese respondents. Similarly, the respondents from both Asian region countries were more collectivist. In terms of advertising strategies, given that Chinese and Taiwanese respondents did not significantly differ on either of these dimensions it may be possible to consider more standardized appeals across the two countries. In particular, messages that appeal to the collective nature of these consumers may work equally as effectively in either country. However, because appeal types were not manipulated in this study, more research is necessary to assess the influence of individualism on message appeal effectiveness.

With respect to media use, while all countries seemed to show similar overall patterns to time spent with media, China and Taiwan were definitely more similar across some of the measures. All respondents in these two countries reported spending time daily reading newspapers and magazines, while 30% of American respondents reported no daily use of newspapers and 26.5% reported no daily use of magazines. In this respect, print is a better medium for reaching Chinese and Taiwanese consumers and may open the way for more standardized print advertising appeals and media placement strategies.

In contrast, China and Taiwan differed most significantly in their time spent with radio and television. Almost twice the number of Chinese respondents listened to the radio for two or more hours a day (33.5%) in comparison to Taiwanese respondents (17.1%). These differences may be partially attributed to variations in telecommunication regulations, the number and variety of program offerings as well as environmental differences such as car ownership and use (Hong 1996; Tsao 1996). However, more research, perhaps qualitative in nature needs to be undertaken to better assess these differences. The same is true for the variations found in time spent with television, where close to 50% of American respondents watched television for two or

more hours a day, followed by 37.5% of Taiwan respondents and only 23.6% of Chinese respondents.

These findings suggest that while the same cultural appeals may be attractive to the collective nature of Chinese and Taiwanese consumers, radio and television media placements should not be standardized. Target audiences in these two countries could be more effectively reached using different broadcast channels. However, the web was found to be the most used medium by all respondents across all three countries.

Twenty-one percent of U.S. respondents reported using the internet for five or more hours a day follow by 14.2 % of Chinese respondents and 11.7% of Taiwanese respondents. This is somewhat surprising given the newness of the medium and the different levels of penetration by country of the internet. The U.S. has a 69% penetration rate of internet users, with Taiwan at 51.1% penetration and China at only 6.8% penetration (InternetWorldStats 2004). With similar cultural backgrounds and a similar appreciation for spending time online, this medium along with newspapers and magazines may be an advertiser's best option for attempting media standardization in China and Taiwan. However, more research is necessary to examine motivations for using each medium to see if similar products and appeals can be presented via the same media channels. Also, differences between the U.S. and the two Asian region countries on internet usage should also be examined more closely. The online sampling method for U.S. respondents may have influenced the higher level of usage among these respondents.

Finally, on the assessment of attitudes toward advertising, Chinese and Taiwanese respondents were significantly more favorable towards advertising in general than the American respondents. As Pierce (1971) proposed, it appears that countries less economically developed do have more favorable attitudes towards advertising and that as economies grow so too might

negative attitudes towards the advertising practice. La Ferle and Lee (2002) provide some support for this theory with results from their 1999 data showing Chinese consumers significantly more favorable towards advertising than Taiwanese consumers. Now in comparing data seven years later, no significant differences were found in the current study between Chinese and Taiwanese attitudes towards advertising. These contrasting differences may indicate that Chinese attitudes have become less favorable as the familiarity with advertising has expanded and the economy has grown. Or the findings may indicate that Taiwanese attitudes have improved. More research is necessary to better assess causality, but in either case the relationships are interesting.

To standardize or to localize began the inquiry of this manuscript and it appears that the answer remains “it depends.” However, given the relative similarities between Chinese and Taiwanese attitudes toward advertising, their shared cultural dimensions, and their similar patterns of media use, it seems as though some degree of standardization may be warranted.

Table 1: ANOVA tests for Individualism, Collectivism, and Attitude toward advertising in General.

Source	Sum of Squares	df	Mean Square	F
Individualism				
Between Groups	192.72	2	96.36	85.56*
Within Groups	2220.25	1972	1.13	
Collectivism				
Between Groups	425.60	2	212.80	201.06*
Within Groups	2087.14	1972	1.06	
Aad-General				
Between Groups	17.72	2	473.15	23.42*
Within Groups	3682.00	2008	20.21	

*p<.001

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