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International Marketing

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Fast-food Industry

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1. Executive Summary

This report provides an analysis of the international marketing environment of the global fast-food industry and evaluates the international marketing activities of McDonald's, which is considered a key player.

Firstly, the PESTLE framework is used to analyse external environmental factors influencing the industry. The Porter's Five Forces framework is utilised to analyse the competitive rivalry within the industry, and its attractiveness for potential new entrants. Key players and their positioning was identified using a strategic-groups model, mapping brand value against global presence.

Based on the industry analysis, McDonald's was identified as the market leader and an examination of their market entry modes was carried out. Their international marketing mix was evaluated to identify success factors, drawing focus upon international branding, international distribution, international communications and standardisation vs. adaptation of the service offering. An internal analysis identified the firm's strengths and weaknesses whilst an external analysis considered the opportunities and threats posed to McDonald's as market leader.

Finally, short and long term strategic and tactical recommendations were outlined in order to enhance McDonald's competitive position within the global fast-food industry. These recommendations are both realistic and well supported, based upon the evaluation of their current strategy and activities.

2. Introduction

The global fast-food industry is dynamic with a variety of competitors. This report identifies the current factors influencing the industry before specifically focusing on McDonald's Corporation, who is considered as the current global leader. Based on this analysis, the report identifies several areas for improvement and makes strategic recommendations for McDonald's to enhance its position.

3. International Marketing Analysis

3.1. PESTEL Analysis and Environmental Impact Matrix (Macro Environment)

The following framework provides an analysis of the external international marketing environment, relating to the fast-food industry:

Factor	Impact of Factor	Potential Opportunity or Threat
Political	<ul style="list-style-type: none"> Government regulation on labeling/packaging Governmental regulations over wage 	Mild threat (-1)
Economical	<ul style="list-style-type: none"> Recession of 2008/high unemployment rate U.S. housing market crash/EU financial crisis Domino effect 	Moderate Opportunity (+2)
Social	<ul style="list-style-type: none"> Health conscious trends 	Moderate Threat (-2)
Technological	<ul style="list-style-type: none"> Social media outlets for consumer Increasing comfort levels with technology 	Significant opportunity (+5)
Environmental	<ul style="list-style-type: none"> Lobbying for environmentally friendly material 	Opportunity (+3)
Legal	<ul style="list-style-type: none"> Advertisement regulations Health lawsuits 	Major threat (-4)

*These ratings are based on the authors' subjective judgement

Political

Global fast-food firms must comply with country-specific political requirements, such as national minimum wage regulations, affecting costs. Hygiene and quality regulations vary significantly between nations and may influence the quality of products provided by fast-food outlets (FDA, 2012). Different countries set varying regulations regarding labelling and packaging. For instance the UK government pressured firms to promote healthy eating, and several fast-food companies have voluntarily included calorie information on their products (BBC, 2011).

Economic

Despite the 2008 recession and the resulting decrease in consumer confidence across the globe, average consumer fast-food spending has increased (The Economist, 2010) due to convenience and low-cost. Consumers are still looking for the convenience of eating out, but are drawn to the low prices of fast-food over table-service restaurants (Financial Times, 2009). Many fast-food chains have capitalised upon the recession by introducing new deals in addition to their already low-priced menus. Between 2005 and 2010, Latin America, Asia Pacific, Eastern Europe and Russia accounted for 89% of global growth in the fast-food industry (Passport, 2012).

Social

Increasing consumer awareness about healthy lifestyles has pressured many fast-food players to offer healthier selections within their menus (BBC, 2011). This includes offering low-calorie options and salads alongside burgers, and prominently displaying nutritional content. The fast-food industry has also been heavily criticised for targeting young children by including toys within children's meals (New York Times, 2003). Recently in the UK, the broadcasting of 'junk food' adverts during commercial breaks in children's programmes has been banned (BBC, 2007), following increasing childhood obesity.

Technological

As consumer familiarity with new technology increases, fast-food firms are using channels such as social media websites to engage with their customers. For example, McDonald's is the 9th most 'liked' brand on Facebook (CNBC, 2012) (Appendix 1). Additionally, digital displays allow outlets to change their menus efficiently, to suit the time of day (NRA, 2012) and self-service ordering points have increased service speed and reduced labour costs.

Environmental

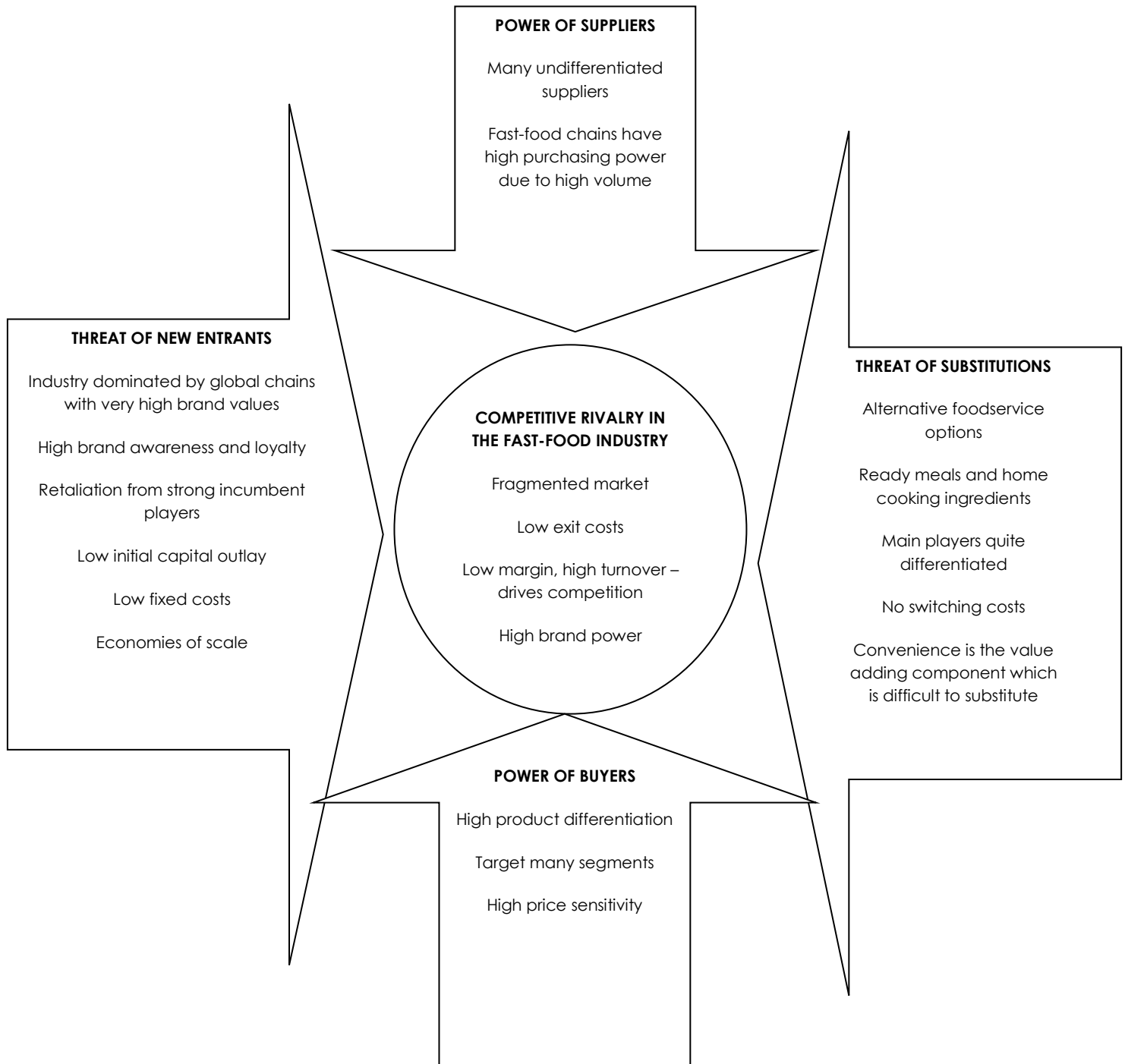
Environmental lobbyists and governments are pressuring the fast-food firms to become more 'green' (Greenpeace, 2012). Rainforests are being destroyed to increase the area of land for beef production to meet the demand for beef-burgers (Kline, 2007). Recycling is a prominent global issue and in response, McDonald's adopted recyclable packaging. Increased environmental awareness among consumers provides firms with a significant opportunity to position themselves as 'green' to garner customer loyalty (National Pollution Prevention Centre for Higher Education, 1995).

Legal

Global operators must comply with country-specific regulations and legislation. This includes opening hours, taxation and employment regulations such as the National Minimum Wage Regulations (1999) in the UK. Firms are often required to meet national food standards such as the requirements set out by the US Food and Drug Administration (FDA). Furthermore, authorities are becoming increasingly worried about childhood obesity associated with the industry (WHO, 2012) and have tightened regulations regarding targeting children.

3.2. Porter's Five Forces – Fast-food Industry

This framework identifies the competitive forces affecting the fast-food industry:



Threat of New Entrants - Moderate

The industry is dominated by a number of international Quick Service Restaurant (QSR) chains, including McDonald's, Burger King, Pizza Hut, KFC and Domino's (Datamonitor, 2010). These global brands are extremely valuable, boasting strong customer loyalty and recognition; indicating consistent quality and service. Key players including McDonald's, adapt their marketing orientation to suit local cultures and social norms (Datamonitor 2010), strengthening the brand and avoiding consumer alienation. New players struggle to compete with incumbent firms, as their brands are unknown and advertising campaigns are expensive. Established chains have the resources to retaliate aggressively through pricing promotions, deterring new players from entering the marketplace. New entrants lack economies of scale, which existing chains have developed over time, and utilise to remain competitive in this low-margin, high-turnover industry. However, social media websites have evened the playing field in terms of marketing communications; they allow firms to efficiently communicate their message inexpensively. Initial capital outlay and fixed costs are low, encouraging new entrants (Datamonitor, 2012).

Threat of Substitutions – Moderate

Substitutes are readily available: food can be purchased almost anywhere, through foodservice or retail. However, convenience is the value-adding component of the service which reduces the threat of substitutes. Consumers can cook at home cheaply, but this lacks the convenience element which people require nowadays. Ready-meals are therefore a more substantial threat, competing with fast-food on price as well as convenience (Datamonitor, 2012). If you are 'on-the-go' however, without access to a microwave, QSRs are almost uncontested if you want a hot meal in a short timeframe. With many differentiated players (Datamonitor, 2012) and varying service offerings, customers can select the best value option.

Competitive Rivalry – Strong

Although McDonald's and Burger King almost hold a duopoly in the 'burger segment', the market as a whole is fragmented with many global chains and independent operators (Datamonitor, 2012). Competition is primarily cost-based with firms continuously investing in their production and service processes to undercut competitors. Exit costs are low and capacity is easily increased through franchising. Branding is the most prevalent weapon for competing; McDonald's spent over \$650 million on global advertising in 2009 (Datamonitor, 2012).

Power of Buyers – Moderate

Figure 1 shows sales and growth of the top ten fast-food companies (Euromonitor International, 2012). The market's competitiveness increases buyer power and customers are price sensitive (Muhlbacker et al., 1999) with no switching cost between providers. However, key players attempt to reduce buyer power, offering a product range which caters for the entire demographic, rather than one specific segment. For example, McDonald's target children with 'Happy Meals' and professionals with breakfast options and take-away coffee (McDonald's, 2012). Firms are increasingly promoting differentiated products: McDonald's "Big Mac", Burger King's "Whopper" and offers such as Domino's "Two for Tuesday" campaign. High brand value and customer loyalty has reduced buyers' bargaining power. The 2011 ranking of the top 100 brands indicates McDonald's' success (Interbrand, 2011).

Operator	2010 sales (US\$ bn)	Chained share	2009/2010 growth
McDonald's Corp	76.5	25.6	5.7%
Yum! Brands Inc	27.8	9.3	5.2%
Burger King Holdings Inc	15.2	5.1	0.9%
Doctor's Associates Inc	14.7	4.9	7.9%
Seven & I Holdings Inc	13.7	4.6	3.8%
Wendy's/Arby's Group	11.9	4.0	-2.8%
Dunkin' Brands Inc	7.4	2.5	3.3%
Tim Horton's Inc	5.6	1.9	5.9%
Family Mart Co Ltd	4.4	1.5	1.7%
Lawson Inc	3.6	1.2	0.4%

Figure 1: Top Ten Fast-food Companies by Growth.

Power of Suppliers – Moderate

With a competitive global supply chain, supplier power is limited. “17,500 British and Irish farms that provide us with top-quality ingredients.” (McDonald’s – UK, 2012) These farms supply Tier 1 suppliers who transform raw materials into food items, ready for McDonald’s to cook and serve. Due to the number of suppliers in the industry, it is difficult for them to leverage significant power over fast-food firms.

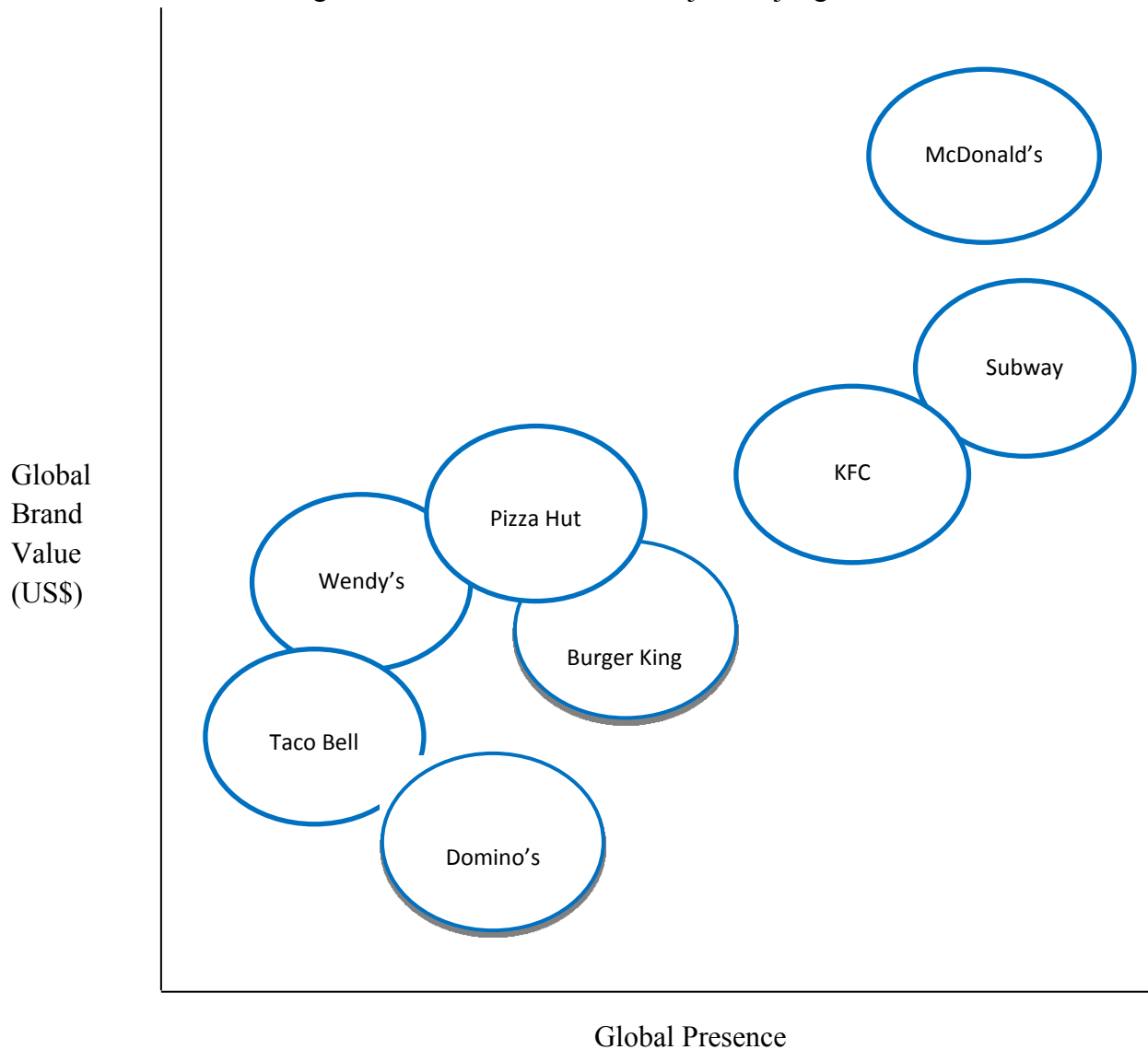
The supply of soft-drink is dominated by Coca-Cola (McDonald’s and Burger King) and Pepsi (KFC) due to their global distribution channels. Additionally, Coca-Cola and Pepsi provide fast-food chains with equipment such as refrigerators and drink dispensers. This markets their brand and aligns it with fast-food brands, reducing costs for customers, which would otherwise be passed onto them (SMO, 2011).

3.3. Identification of Key Players and their Competitive Position

3.3.1. Strategic Groups

The following framework identifies the key players in the international fast-food industry and identifies which firms are in the most direct competition with each other:

*These ratings are based on the authors' subjective judgement



Brand value and the chain's global presence (Appendix 2) are significant indicators of overall performance. The above strategy-group chart maps the firms' performance. Brand value (US\$) is plotted against the chain's global presence, in terms of the number of outlets worldwide. The strategy-grouping shows that McDonald's has the

highest global market value and revenue in the industry, despite Subway having more international outlets.

4. Key Player – Evaluation of International Activities

4.1. Identification of Key Player

Based upon their global presence, market value and revenue, McDonald's is identified as the key player in the industry.

4.2. McDonald's International Market Entry Modes

In 1940, McDonald's operated only one QSR but today has restaurants at 33,000 locations in 119 countries. McDonald's utilises a variety of international market entry modes for rapid expansion: sole ventures, franchising, master franchising and joint ventures.

15% of McDonald's branded restaurants are operated as sole ventures. This involves a significant capital commitment but allows the highest degree of control.

Most restaurants are operated as franchises, allowing rapid expansion without high capital requirements. Franchising has also allowed McDonald's to benefit from local knowledge, demonstrated by the menu differences by country. However, McDonald's maintains control over crucial aspects such as the supply chain, marketing mix and staff training.

Master Franchising introduces a third party as a 'go-between' to overcome geographical and cultural barriers. The combination of the master franchisee's local knowledge and McDonald's brand and model has been a successful formula, allowing expansion whilst maintaining significant control.

McDonald's has also expanded internationally through joint ventures. Again, this allows for rapid expansion and utilises the knowledge of firms in closely-linked markets. Since

both firms invest equity in the project, there is a lower financial risk for both parties; however, many joint ventures end in hostility and conflict due to firms taking advantage of one another (Brown and Harwood, 2010).

4.3. McDonald's International Marketing Mix (7Ps)

This framework identifies many of McDonald's success factors within each business area.

4.3.1. Product

McDonald's strives to offer a standardised service worldwide (McDonald's Corporation, 2012). However, the company is embedded with an 'entrepreneurial spirit' giving franchisees some local control and creativity, providing the service offering is of a high standard (Appendix 3). Some of the most famous products including the Fillet o' Fish, the Egg McMuffin and the Big Mac were created through franchisee innovation. Franchisees are given autonomy to adapt the products (Datamonitor, 2010) whilst the corporation maintains a high degree of standardisation through quality control. The majority of well-known products are usually offered in all markets unless they do not suit local customs and religion. For instance, Big Macs are not sold in Indian outlets as the population is primarily Hindu. However, even 'iconic' products are adjusted to local taste such as providing spicier food in most Asian countries, allowing the company to overcome a variety of cross-cultural barriers (McDonald's, 2012).

4.3.2. Price

McDonald's has positioned itself as a fast-food outlet offering low-cost food and drink. The affordable menu has been adapted worldwide whilst maintaining their core goal of quality assurance. Ongoing innovation has allowed new pricing strategies such as the 'Dollar Menu' or its equivalent 'Saver menu' in the UK (McDonald's

Corporation, 2012). In response to increasing food costs, McDonald's opted to increase prices by less than 1%, adopting the change gradually to the menu in order to retain price-sensitive customers (Lockyer, 2011).

4.3.3. Place (International Distribution and Supply Chain)

Although McDonald's product offerings differ between countries, they operate a standardised global supply chain. This lean operation is 100% outsourced with no back-up system. The chain comprises of two tiers. Tier 2 suppliers are primarily food producers, whilst Tier 1 suppliers are processors. For example, a Tier 2 potato farm supplies a Tier 1 processing firm who turn the potatoes into French-fries and potato wedges. Produce is transported to distribution centres before allocation and delivery to individual restaurants. The success of the supply chain is attributed primarily to their commitment to outsourcing non-core activities to expert firms.

McDonald's supplier terms are rigorous; suppliers are expected to be accountable until the food is consumed and the end customer is satisfied. Legally-signed contracts with suppliers are not used; all deals are made on a handshake because they operate a 'one supplier - one product' policy and maintain long-term relationships regardless of the external environmental conditions.

McDonald's has 30 – 35 stock-keeping units at the supply side, creating a streamlined operation. Sole distribution partners are responsible for the entire logistics process in designated geographical areas, whether it be the daily hamburger order, or a replacement appliance. McDonald's continuously scrutinises these partners to ensure they are meeting goals and benchmarks to improve efficiency.

The 'pull strategy' allows individual restaurants to place orders with distribution centres, which then re-issue orders to suppliers who only produce the quantities ordered. This means suppliers hold little surplus stock, optimising efficiency.

The 31Q system forecasts demand accurately, allowing suppliers to plan three years in advance. Lead-time is critical and this system ensures that demand is always catered for.

Hazard Analysis Critical Control Point (HACCP) and Supplier Quality Management System (SQMS) programmes ensure compliance with legislation. These systems trace food produce ‘from farm to fork’ and ensure quality, hygiene and food safety at every level.

4.3.4. Promotion

McDonald’s achieved 6th position on “Best Global Brands 2011” as a result of continuous promotional activities. The iconic “Golden Arches” (Appendix 4) are used in promotions globally. The “i’m lovin’ it” campaign, launched in 2003 used celebrity endorsement to increase their appeal to younger consumers. Justin Timberlake was used for vocals and the campaign was launched in 86 English-speaking countries (Appendix 5) and was adapted for non-English speaking countries.

Recently, the “what we’re made of” campaign increased transparency and was used to fight against negative publicity regarding ingredients.

4.3.5. People

At McDonald’s, service employees represent the brand at the frontline where customers have their first interaction with the organisation. It is important that staff give a good impression and therefore, training is of paramount importance. Employees undergo rigorous on-the-job training in customer service, food handling and preparation.

In addition, McDonald’s provides opportunities for managers and would-be franchisees to develop and hone their management skills through a dedicated facility –

the Hamburger University (HU). HU has campuses worldwide and provides training for employees to improve their proficiency in managing the restaurant.

McDonald's aim is to create a vibrant working environment for staff and managers. This creates a chain effect whereby customers are positively influenced and are more likely to return. To re-create this chain effect in different markets, the recruitment and training processes are standardised globally. McDonald's is always on the look-out for lively team players who are trained according to guidelines, which provides Quality, Service, Cleanliness and Value (QSC&V) to every customer that they serve.

4.3.6. Process

As the term 'fast-food' suggests, McDonald's prepares and serves food rapidly. Strict guidelines and regulations are followed in food preparation to ensure high standards of hygiene and food safety. Customers can usually see the kitchen while being served, allowing transparency, so customers can eat in confidence. Food is mass-cooked and hot-held until service. However, due to the continual stream of customers, it does not deteriorate before consumption.

To maintain its foothold as market leader, McDonald's maintains a high degree of process standardisation across all outlets to increase efficiency. This ensures that they have high standards of hygiene and food safety in all outlets.

4.3.7. Physical Evidence

McDonald's has a homogenous 'look' across their outlets from décor to staff uniform. Their global re-branding strategy furthers standardisation, allowing consumers to experience familiarity despite visiting outlets in different countries. In family-oriented areas, there are indoor playgrounds to satisfy customers. The company ensures that all franchisees comply with regulation regarding hygiene to maintain their reputation for

cleanliness. Staff training is standardised globally to ensure customers are treated consistently.

4.4. International Branding

McDonald's relies heavily on brand recognition. The company's 'Golden Arches' are an iconic aspect of American culture, which has been successfully exported to the rest of the world. During the mid 2000's, McDonald's began a global re-vamp of their image (Bloomberg Business Week, 2006) following bad publicity associated with the company (Kline et al., 2007). The aim of re-branding was to create a sleeker and 'friendlier' look, appealing to younger generations. However, the brand continues to face criticism across the globe regarding their unhealthy menu, unfair competition and trade practices (Datamonitor, 2011).

4.5. McDonald's Internal and External Analysis

The following framework identifies McDonald's internal strengths and weaknesses along with external opportunities and threats.

	Favourable	Unfavourable
Internal	<ul style="list-style-type: none">• Large saturated target audience• Strong global brand• Large product offering• Strong ability to adapt	<ul style="list-style-type: none">• High staff turnover• No prime location• Saturation in 119 countries
External	<ul style="list-style-type: none">• Franchise opportunities• Increase in Out-of-Home eating• Growth of hot drink market	<ul style="list-style-type: none">• Health trends in eating• Replacements for fast-food• Financial Crisis/Inflation

4.5.1. Internal Analysis

McDonald's boasts a brand value of \$35,593 million (2011), a 6% increase from the previous year (Interbrand, 2011) and their 'Golden Arches' is said to be the "most recognized symbol in the world" (Business Insider, 2010). Between 2007-2010, their profit margin increased from 3.74% to 13.27% in the UK (Datamonitor, 2010), suggesting a significant improvement in efficiency. The successful introduction of new menu choices, coffees and smoothies increases differentiation, improving customer loyalty.

McDonald's has high brand reliance and if damaged by negative publicity, it could ruin credibility and customer loyalty could deteriorate. Additionally, McDonald's high staff turnover rate of 130% results in high recruitment and training costs (Schmeltzer, 2007).

4.5.2. External Analysis

McDonald's has many opportunities in the external environment due to an increase in eating out, and growth of the hot drinks market. During the recession, McDonald's Informal Eating Out (IEO) market share increased to a record high of 11.5% and a quarter of surveyed teenagers said they purchase fast-food at least once a week (Mintel, 2011).

The global hot drink market generated \$68 billion in revenues in 2009 and is predicted to grow to \$81.4 billion by 2014, presenting McCafe, McDonald's speciality coffee kiosk an opportunity to thrive. Until recently, McCafe has been a product development within existing outlets; however, McDonald's could launch a new franchise scheme for McCafe as an independent brand with its own outlets in this rapidly growing market.

McDonald's market share increased during the 2008 recession, but high inflation rates still affect global daily dealings (Mintel, 2011). Competition from daily-deals websites such as Groupon, reduces the cost of table-service restaurants, often to the same price-point as QSRs. This is a substantial threat to McDonald's as it brings more players into direct competition.

Health consciousness trends are a global threat, as McDonald's has been traditionally perceived as offering only fatty food. Recently, some healthier options have been introduced, i.e. salads and wraps, in efforts to shift their position in the consumer eye. However, the brand is still perceived as 'unhealthy' and this poses a continual threat.

McDonald's has been highly criticised for high-calorie menu, and it could have a negative impact over time if health and wellness trends continue (Datamonitor, 2011).

4.6. Strategic and Tactical Recommendations for McDonald's

The following table outlines the strategic and tactical recommendations for the future success:

Short-term (6 months- 1 year)	Long-term (1- 5 Years)
Continue expansion of their franchises in developing markets with growing middle classes	Increase recycling and environmental friendly material and packaging completely
Adapting the menus to the cultural and regional taste (brazil pastry, India – cheese, size adaptation)- health trends	Increase charity work such as health conscious charities as more regulation for advertising appears
Loyalty program- point system leading to free item system, discount	Enter health conscious food market with another brand

4.6.1. Short Term Recommendations (6 months – 1 year)

Further expansion in emerging markets with growing middle classes provides growth opportunities since many western markets are saturated.

Cultural taste is already a focus for McDonald's and emerging economies offer multiple opportunities for product adaptation. For example, pastry options in Brazil and cheese products in India could increase sales. Further adaptation of meal size and price will cater for a larger market demographic.

A loyalty scheme can be used to increase purchase frequency. This could be initiated through student discounts, or a points-based scheme offering a free item after multiple purchases.

4.6.2. Long-Term Recommendations (1 – 5 years)

With growing environmental awareness, environmentally-friendly and ethically-sourced packaging could be used to further differentiate McDonald's from competitors.

Although McDonald's supports various charities including the Ronald McDonald House Charities, further emphasis on charitable work could positively alter customers' perception of the brand, especially since their product offering is often seen as a barrier to "good health".

Entering the health-conscious fast-food market under the guise of a different brand would secure a larger market share and diversify their business, spreading the risk of failure. For example, Coca-Cola launched the health-conscious Vitamin Water brand, which is perceived very differently to Coca-Cola itself.

5. Concluding Statement

The fast-food industry was identified as a low-cost, high-turnover industry with strong competitive rivalry. After a thorough industry analysis, McDonald's was identified as the market leader and was selected as a key player on which to carry out an evaluation regarding their international marketing activities. Upon recognition of both internal and external factors, supported recommendations were formed to enhance McDonald's competitive position in the international market.

6. Appendices

6.1. Appendix 1

McDonald's is the 9th most 'Liked' brand on Facebook:

(www.cnn.com)

The World's Most 'Liked' Brands

8 of 17

» More Slideshows



9. McDonald's

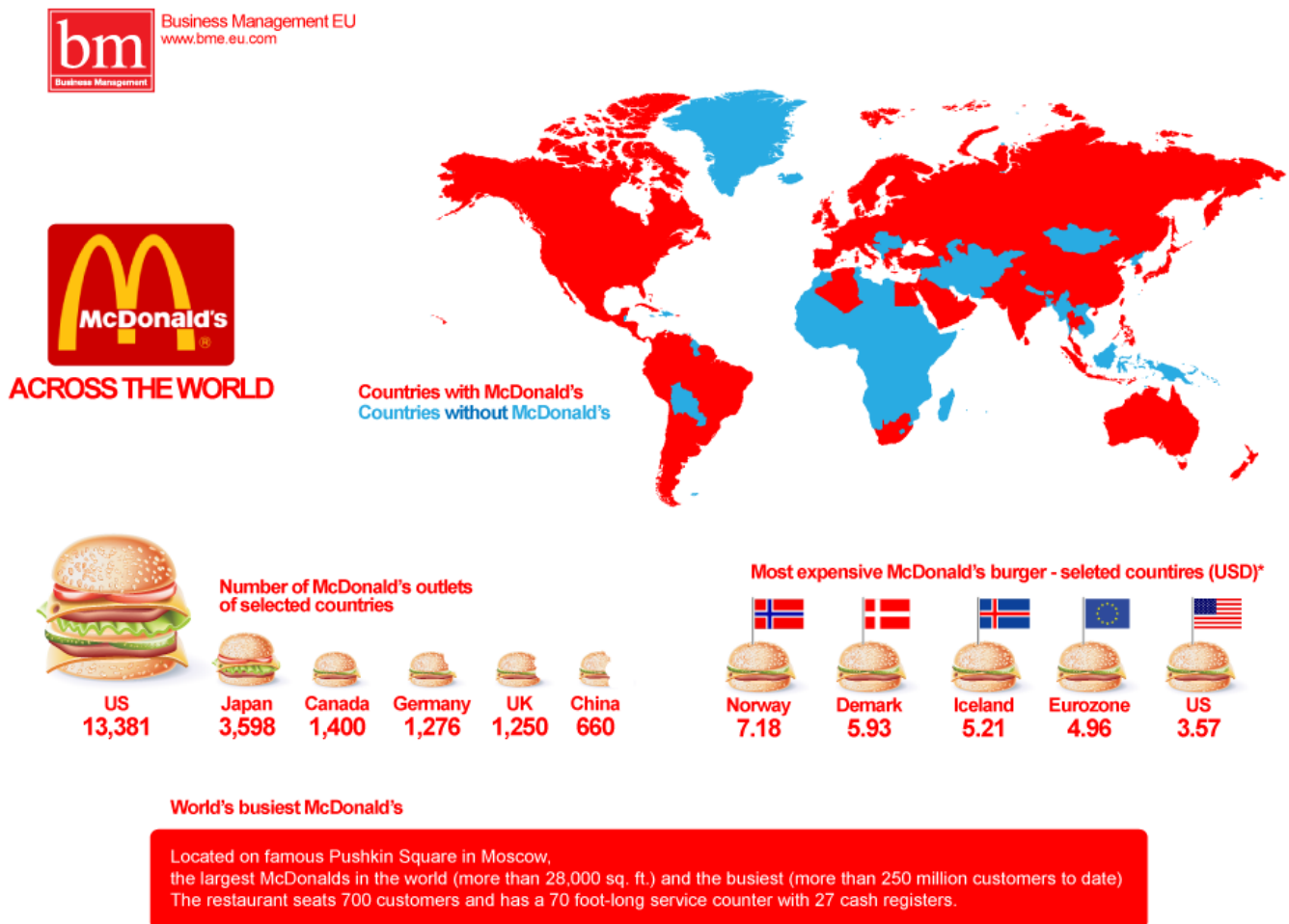
Number of "likes": 11.79 million
People talking about this: 115,289
[Facebook page](#)

McDonald's is highlighted as a good example of how brands can engage with customers via Facebook, on top of the fast-food giant's 11.8 million fans. McDonald's currently highlights a "Quest for the Golden McRib" game on its page, offering a unique opportunity for fans to engage socially with an already-popular McDonald's menu item. The company also maintains engagement through several Facebook-exclusive promotions, with several posts connected to its popular Monopoly contest.

McDonald's also has been known to do traditional press releases around its Facebook campaigns, driving conversations on the social network. The company often links to its community.mcdonalds.com site, where it looks to have the community spread the word about their favorite meals, win prizes, and play games. McDonald's also connects the page with other Facebook properties, including CityVille to appeal to a broader audience. One post from Nov. 4, 2011, said "Play CityVille? So do we! When you master a McDonald's restaurant in your city, you'll earn an exclusive reward with an 18 percent bonus!"

6.2. Appendix 2

Map depicting McDonald's global presence:



* Price using the Big Mac Index published by The Economist, as an informal way of measuring the purchasing power parity (PPP) between two currencies and provides a test of the extent to which market exchange rates result in goods costing the same in different countries.

Source: www.oanda.com | www.aboutmcdonalds.com

6.3. Appendix 3

Examples of franchisee adaptation catering for local tastes, cultural differences and social norms:



6.4. Appendix 4

Iconic 'Golden Arches' logo used globally in all promotional material:

(www.mcdonalds.com)



6.5. Appendix 5

Table showing countries in which the McDonald's "I'm lovin' it" campaign was standardised:

i'm lovin' it	English	<p>American Samoa, Andorra, Australia, Austria,</p> <p>Azerbaijan, The Bahamas, Bahrain, Belarus, Belgium,</p> <p>Brunei, Bulgaria, Canada, China, Croatia, Cyprus,</p> <p>Czech Republic, Denmark, Dominican Republic,</p> <p>Estonia, Fiji, Finland, France, Georgia, Gibraltar,</p> <p>Greece, Guam, Hong Kong, Hungary, Iceland, India,</p> <p>Indonesia, Ireland, Isle of Man, Israel, Italy, Japan,</p> <p>Jordan, Kazakstan, Kuwait, Latvia, Lebanon,</p> <p>Liechtenstein, Lithuania, Luxembourg, Macau,</p> <p>Macedonia, Malaysia, Mauritius, Mexico, Moldova,</p> <p>Monaco, Montenegro, Morocco, Netherlands, New Caledonia, New Zealand, Northern Mariana Islands,</p> <p>Norway, Oman, Pakistan, Poland, Portugal, Qatar,</p> <p>Romania, Russia, Samoa, San Marino, Serbia,</p> <p>Singapore, Sint Maarten, Slovakia, Slovenia, South Africa, South Korea, Spain, Sri Lanka, Suriname,</p> <p>Sweden, Switzerland, Taiwan, Thailand, United Arab Emirates, United Kingdom, United States, Yemen</p>
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