



## **Differing Market Strategies of the McDonald's Brand in Various Income Countries**

**Caroline Hedde**

**Reid Banbury**

**Will Tamplin**

**Matthew Krantz**

**University of Richmond**

## INTRODUCTION

The global market for fast food is constantly adapting to meet the demands and preferences of consumers. Global brands are often perceived differently across the countries and diverse cultures in which they operate. In our study, we considered how McDonald's, a leading global fast food franchise, effectively functions in the distinctive markets it serves. In the study, we asked how the perception of the brand differs in various countries and how the company adapts to appeal to a large range of cultural preferences. To analyze McDonald's' global strategy, we considered the company's presence in China, the United Kingdom, and the United States, three countries with unique socioeconomic climates. Through qualitative research, we analyzed data from primary and secondary sources and conducted interviews to gain a better understanding of how McDonald's is responding to the preferences of diverse cultures and income levels.

The first McDonald's was opened in San Bernardino, California in 1940. Since then, the company has grown into a multibillion dollar company with more than 36,000 locations in over 100 countries. The United States is host to the most McDonald's locations by far, with over 14,000 McDonald's stores. Japan is second with 3,000 stores. However, McDonald's gains the most revenue from Europe, which hosts almost 8,000 stores. McDonald's remains steadfast to their food philosophy of "the simpler the better", and they have taken an initiative in recent years to apply this philosophy to their product to meet the demands of customers. As of 2012, McDonald's has stuck with an initiative to reduce the number of calories and sodium in their happy meals. This has resulted in a 20% reduction in calories across all their menu items and a 15% reduction in sodium. In 2016, McDonald's announced that it would be removing artificial preservatives from some of its items, including its iconic Chicken McNuggets. Additionally, McDonald's has made an attempt to serve chicken not treated with antibiotics. These changes reflect one of the many ways that the company is attempting to adapt to consumer and cultural preferences as the importance of nutrition has increased in recent years. ("Our History and Timeline | McDonald's, 2017").

There is a copious amount of information that has been published about the McDonald's franchise and brand. However, a study focusing on the company's variance across differing markets has yet to exist. The vast countries in which McDonald's operates contain unique values and traditions. Therefore, the company must alter its advertising strategy to appeal to different groups. The purpose of this study is to examine how McDonald's advertisements differ in the United States, the United Kingdom, and China and the resulting consumer perception of the brand in these respective countries as a result of these differences. The study intends to examine how the corporation approaches consumers differently to adapt to specific markets in the varied income countries in which it operates.

## **MCDONALD'S APPROACHES TO VARIOUS MARKETS**

China, currently a low-income country, is a rapidly expanding market for the McDonald's brand. McDonald's currently operates 2,500 franchises in Mainland China and 240 locations in Hong Kong. The company plans to continue its expansion by opening additional local franchises in the next year and projects to open two thousand or more locations on the Mainland within the next five years. At this rate, China will soon become the second largest market for McDonald's behind the United States. The corporation has benefited from the country's recent surge in economic growth in the developing market with its management planning to make further investments in the expansion of the brand. McDonald's appeals to Chinese consumers who enjoy the "exotic" foods and westernized ambiance of the chain. Often, Western chains are considered to be upscale or premium brands in lower income countries (Wang, August 2017). Recently, McDonald's has started to add more Chinese-style items to their menu in order to appeal to the Chinese local cultural preferences. These items include green tea and many other traditionally Asian-themed products. Globally, McDonald's far surpasses Kentucky Fried Chicken, its leading competitor, but in China alone, KFC dominates the market, with over 5,000 restaurants in over 1,100 cities. To combat their major competitor, in China McDonald's offers chicken wings on its menu which it does not offer in the majority of countries it operates in. Moreover, McDonald's is adapting to changing consumer preferences by targeting the delivery service market in China. With a high population density and increased value placed on convenience, China is the leading country for food delivery services, and soon McDonald's plans to offer delivery options at seventy-five percent of its locations. Increasing sales and expansion have caused the company's goal of doubling profits to become attainable in the near future (Wang, August 2017). Soon there will be a "Golden Arches", as McDonald's is referred to in China, in every Mainland city, so that a McDonald's meal will be within walking or delivery distance no matter where a potential customer is in the country (Najberg, December 1995).

The United Kingdom is home to one of McDonald's' largest international markets, and it has experienced growing sales in recent years. McDonald's has upgraded their restaurants through modern appearance and delivery services including UberEATS (Baccardax, October 2017). McDonald's in the United Kingdom and elsewhere, like other fast food restaurants, has been criticized for unhealthy, fattening products. The chain has recently taken an initiative to offer healthier food to consumers. McDonald's in the United Kingdom now utilizes local food sources, such as organic milk and local potatoes with fewer ingredients than "regular" McDonald's fries (Baccardax, October 2017). McDonald's also has a competitive advantage in the United Kingdom, since their closest competitor, Burger King, operates five hundred fewer franchises in the country than McDonald's. In the United States and China, however, competition is much more acute. Many other fast food restaurants operate and are popular in those countries compared to

the United Kingdom. For example, in the United States, "midmarket" restaurants with delivery services, such as nationwide pizza delivery chains and take home food options from grocery stores, are quite popular, creating more competition for McDonald's (Baccardax, October 2017). As previously mentioned, KFC is widely popular in China, and it is the country's number one fast food chain. In the United Kingdom, McDonald's innovations and adaptations are showing promise for the company's future plans and expansion. The question remains how these new changes will result in other countries with more competitive markets.

In an increasingly competitive market where variety, price, and nutrition are among the top considerations for consumers when choosing where to eat, McDonald's in the United States has responded to these demands by increasing the nutritional value of its menu items by reducing their sugar, sodium, and caloric content across its menu. Furthermore, McDonald's has made great strides to improve the overall quality of its ingredients, opting to use 100% Angus beef, 100% white meat chicken, and higher quality dairy products for their ice cream offerings, including the McFlurry. Like many fast-food and fast-casual restaurants making advancements in technological development, McDonald's continues to improve both efficiency and overall customer experience through the creation of a mobile ordering app, enabling customers to order fully customized burgers, sandwiches, and beverages ready for pickup in just a few clicks. With many other fast food chains offering combination meals, such as the Subway Five Dollar Footlong and the KFC Five-dollar Fill Up, McDonald's has responded to competitors with the addition of the McPick 2, allowing customers to choose two regular size menu items for five dollars (MCDONALD'S PROFITS JUMP AS IT EYES MORE HOME DELIVERY, October 2017). Through the increase in nutritional value, streamlined mobile ordering, and competitive prices, McDonald's has made attempts to improve their brand in the United States. It will be interesting to observe how McDonald's can continue to offer higher quality items to their customers while maintaining high profitability in future years.

Our study interviewed an informant from the United States, China, and the United Kingdom. The informant from China and the United Kingdom generally did not perceive the McDonald's brand as positively as did the American informant. The British informant cited two main reasons for this difference "McDonald's food is very processed and contains a lot of chemicals," and "there are fewer fast food chains" in the country. The Chinese informant claimed that China's perception of McDonald's is negative because "it's a fast food restaurant, and people get fat if you eat it too much." The American informant had a more positive view of the McDonald's brand, stating that "it is a staple of American culture," but he also believed that America's view of McDonald's "is going to change a lot in the next forty to fifty years." The informants also perceived differences in McDonald's branding worldwide. In the United Kingdom, McDonald's franchises "have a more restaurant style and are much fancier." In China, "McDonald's serves fried chicken," which our Chinese informant said, "he hadn't seen in McDonald's in America." The informants also had a different favorite fast food chain in their respective countries. The United States' informant preferred McDonald's, while the United Kingdom's informant preferred Chicken Cottage (a British-based franchise), and the Chinese informant favored

Kentucky Fried Chicken. To summarize, the McDonald's brand differentiates its products and appearances to better align with consumer preferences in different countries. Our qualitative research revealed that the perception of the McDonald's brand is generally more positive in the United States than in China and the United Kingdom.

## **AN ANALYSIS OF MCDONALD'S STRATEGY**

As a global brand, McDonald's must constantly adapt its marketing strategies to appeal to the different consumer preferences in the countries that it operates in. To assess the validity of this statement, we conducted analytical research of secondary data on McDonald's marketing strategies in each of the countries of interest: China, the United Kingdom, and the United States. In our findings, we concluded that while McDonald's in these countries has some similar marketing strategies, it also conducts strategies that are only implemented in one of the three respective countries. In the United States, there are many country specific marketing strategies. For instance, the United States marketing team launched an all-day breakfast menu in October of 2015 to increase revenue growth through 2016. The "novelty" value of the all-day breakfast menu faded over the course of the year. (Passport GMID article: McDonald's Corp in Consumer Foodservice, June 2017). Additionally, the United States is transitioning its focus on innovation by improving their technology, ordering efficiency, and payment options. Specifically, McDonald's is doing this by incorporating a mobile app, an alternative way to order and pay for food, and by opening in-store kiosks to improve ordering efficiency. (Passport GMID article: McDonald's Corp in Consumer Foodservice, June 2017). With these new ordering methods, employees play a smaller role in the food order process. To ensure customer satisfaction, McDonald's plans to experiment with table service to reduce lines. This will not only allow for improved efficiency, but will also simultaneously allow for face to face interaction with customers. This new service will eliminate the need to make job cuts, combating the reduction in job positions with the addition of the kiosks. In the United States, we found a focus on improving food quality which is a strategy throughout the three countries. Specifically, McDonald's did this in the United States by removing high fructose corn syrup and artificial ingredients in its meals. By improving food quality, the United States is able to better compete in the saturated fast-food market. (Passport GMID article: McDonald's Corp in Consumer Foodservice, June 2017).

In the United Kingdom, similar to the United States, food quality and dining experience have become the major flaws in their brand. McDonald's is making an attempt to cope with the movement towards premium products from competitors by improving the quality of its menu items. McDonald's in the United Kingdom is doing this by implementing a range of first-rate, customizable burgers. In addition, the United Kingdom is currently working on adding table service in some of its locations in an effort to enhance the customer experience (McDonald's United Kingdom in Consumer Foodservice, May 2016).

Like the United Kingdom and the United States, China is focusing on trying different strategies to improve its menu, value, food taste and nutrition, and dining experience in

order boost the brand to better compete with other companies (McDonald's China in Consumer Foodservice, May 2017). One marketing focus that is specific to McDonald's China is its increased emphasis on helping China's environmental quality by executing more eco-friendly practices (McDonald's China in Consumer Foodservice, May 2017). In recent year, the Chinese government has made a substantial effort to improve its environmental impact by reducing its carbon footprint and by significantly increasing its renewable energy supply. As a result, China has become one of the leading countries in renewable energy. McDonald's efforts to help improve the environment is a strategy that is being implemented in response to the country's specific consumer preferences. This strategy has provided McDonald's with positive publicity and recognition among Chinese consumers. Another strategy McDonald's China has carried out is implementing localized flavors in the menu to become more appealing to consumers who prefer traditional and common Chinese food products to the unfamiliar American flavors (McDonald's China in Consumer Foodservice, May 2017). Certainly, one thing our data-analysis revealed is that throughout its locations, McDonald's is seeking to offer improved food quality through enhanced nutrition, flavor, value and dining experience. Through analyzing and contrasting the data of each country's marketing strategies, we found that McDonald's has varied its approach to strengthen its brand recognition and to appeal to the many specific consumer preferences in the countries that it operates in.

We created a number of hypotheses that were to be investigated in our content analysis. These hypotheses were based on our secondary research and informants' responses from the in-depth interviews previously conducted. We collected data from 35 advertisements located on McDonald's websites or social media pages from each of the three countries of interest. The data instrument used for this study contained 20 areas of nominal, interval, and ratio data. Two members of the study rated the advertisements in the 20 categories being studied. If there was a discrepancy between the two rating, a third member of the study would make the final coding decision. Mean values were rounded to two decimal places and p-values were rounded to six decimal places. The advertisements on the websites and social media pages for McDonald's U.S., U.K., and China were analyzed using nominal observations and interval scales. Nominal data was then taken and examined using visual graphical analysis. The mean values and variances of interval data were calculated using a univariate ANOVA test and the significance of variance was decided using the p-value of the resulting test.

Due to the fact that our English informant stated that she felt McDonald's in the United Kingdom had a fancier interior than in the United States, we created Hypothesis 1: McDonald's advertisements in the United Kingdom will appear more formal than its advertisements in the United States and China. Advertisements were rated on an interval scale with 5 indicating the advertisement had a formal look and 1 indicating the advertisement had a casual look. McDonald's United States advertisements had a mean of 2.76, the United Kingdom's advertisements had a mean of 3.39, and China's advertisements had a mean of 2.57. Using a univariate ANOVA test for variance, we found the p-value to be 0.006847, meaning the data was highly significant with a p-value less than 0.01.

Based on international advertisements that we had observed in our secondary research, we predicted that Chinese advertisements for McDonald's would be more vibrant compared to that of the other countries we studied. We arrived at Hypothesis 2, that Chinese advertisements for McDonald's will incorporate more colors compared to McDonald's advertisements in the United States and United Kingdom. Advertisements were again rated on an interval scale with 5 being very vibrant and 1 being not vibrant at all. The McDonald's advertisements in the United States' had a mean of 3.18, the United Kingdom had a mean of 3.79, and China had a mean of 3.33. Using a univariate ANOVA test for variance, we calculated a p-value of 0.069258 which we interpreted as marginally significant with a p-value less than 0.10. The data disproved our Hypothesis 2 finding that the United Kingdom had the most vibrant advertisements.

Because of the historical prevalence of the color red in China, we came up with Hypothesis 3, stating that McDonald's advertisements in China will incorporate more red than McDonald's advertisements in the United States and the United Kingdom. A nominal scale with nine colors was used to collect the data from the advertisements. In the McDonald's United States advertisements, the most prevalent colors were red and black. In the United Kingdom, the most significant colors were red, black, and brown. In China, the most prevalent color was white. Our research revealed that although black was a prominent color in McDonald's advertisements for the United States and the United Kingdom, none of the McDonald's Chinese advertisements had black as the main color. Additionally, a possible reason for the prevalence of red in the United States and the United Kingdom is that we studied the advertisements in December. Since the study was done around Christmas time, the United States and the United Kingdom, two countries that place a high value on the holiday, had many seasonal product advertisements and incorporated more of the color red in general.

The prominent presence of a fast food culture in the United States led our study to develop Hypothesis 4: The quantity of food in United States' advertisements for McDonald's will be larger than the quantity of food in McDonald's advertisements in the United Kingdom and China. Additionally, the increased nutritional focus of McDonald's in the United Kingdom, in particular, led us to believe that this would be true. Advertisements were rated on an interval scale with 5 being a larger than serving size quantity of food and 1 being a serving size quantity of food appearing in the various advertisements that we analyzed. The United States' advertisements had a mean of 2.64, the United Kingdom had a mean of 2.57, and China had a mean of 2.76. We were surprised to learn that McDonald's depicted the largest quantity of food in its advertisements. The p-value calculated from this data was 0.893866, we concluded that this hypothesis was not statistically significant with a p-value greater than 0.10.

McDonald's' recent emphasis on locally grown and healthier food options in the United Kingdom led to the development of Hypothesis 5: McDonald's in the United Kingdom will carry and advertise higher quality ingredients than the United States and China. Interval data was gathered on a scale with 5 being high quality, healthy ingredients and 1 being low quality, unhealthy ingredients. From the data collected, the p-value calculated was

0.098001. We concluded that Hypothesis 5 was marginally statistically significant with a p-value less than 0.10 but greater than 0.05.

McDonald's in the United States operates in a highly saturated market; therefore its competitive prices are likely something that the company wants to advertise. Based on the advertisements that we observed in secondary research, we generated Hypothesis 6: McDonald's advertisements in the United States will have a higher price incidence than its advertisements in the United Kingdom and China. McDonald's advertisements from each of the respective countries were rated on an interval scale with 5 being a high price incidence and 1 being a low price incidence. We found that most of the advertisements for all three countries had very low levels of price incidence. The p-value calculated was 0.123751, a statistically insignificant value being greater than 0.10.

Advertisements in the United Kingdom previously observed placed a large emphasis on social interactions between families, friends, and acquaintances. From this observation, we created Hypothesis 7: McDonald's advertisements the United Kingdom will place more of an emphasis on socialization while McDonald's advertisements in the United States and China will place more of an emphasis on products. Data was collected and rated on an interval scale with 5 being primary emphasis placed on the product and 1 being primary emphasis placed on socialization. The data collection revealed that all three countries placed more of an emphasis on product rather than on socialization. Advertisements from the United States had a mean of 4.40 while advertisements from the United Kingdom and China had a mean of 3.86 and 4.15 respectively. Using a univariate ANOVA test for variances, a p-value of 0.086401 was calculated. Hypothesis 7 is marginally statistically significant with a p-value less than 0.10 but greater than 0.05.

The United States has an assortment of competitive fast food chains. The country's prevalent fast-food and fast-service market led us to develop Hypothesis 8: McDonald's advertisements in the United States will focus more on branding than McDonald's advertisements in the United Kingdom and China. We believed that the competitive atmosphere would require McDonald's in the United States to use more branding to gain substantial recognition among potential customers. Advertisements were rated on an interval scale with 5 being a high amount of branding and 1 being a low amount of branding. Research revealed that the United States had the highest amount of branding with a mean value of 2.92. United Kingdom contained the second highest amount of branding with a mean value of 2.43. China had the least amount of branding in its advertisements with a mean value of 2.15. We found these values to be marginally statistically significant with a p-value of 0.099831.

The differing values and cultures in the United States, United Kingdom, and China led our study to believe that advertisements would appeal to these diverse values. Hypothesis 9: McDonald's advertisements in England will be more emotional than McDonald's advertisements in the United States and China, which will be more rational. Advertisements were rated on an interval scale with 5 being rational and 1 being emotional. Advertisements between the country showed very little variance and using a



univariate ANOVA test, we concluded that there was not a statistically significant difference between the advertisements with a p-value of 0.630886.

There were two main limitations to our study of the McDonald's brand's adaptations to various consumer cultures. The informants used for in-depth interviews on McDonald's in the United States, the United Kingdom, and China all were from upper middle-class backgrounds. This posed the greatest issue for our study in our analysis of the Chinese market because our research primarily was concerned with China as a lower income country. Further research could address if a consumer from a lower income level in China might have different views on the McDonald's brand than our informant. Additionally, we analyzed the websites and social media pages at a particular time of year. McDonald's, at the time that we performed our study, had its holiday offerings and promotions out. We believe that this impacted the prevalence of red in the color scheme of its website in the United States and the United Kingdom. It would be beneficial for additional research to be conducted during a different time of year to see if the color scheme changed.

The statistical data calculations served to both prove and disprove our original hypotheses. The p-value calculated for each hypothesis assisted in determining whether the data was statistically significant or not. After completing the necessary calculations, we have concluded that McDonald's advertisements appear more formal in the United Kingdom than in the United States and China, and we concluded that it is highly significant. There was a marginally statistically significant difference in vibrancy in ads, however, we disproved our Hypothesis 2 because McDonald's ads in the United Kingdom had a greater color vibrancy than those in China. Furthermore, we found that the difference in the quantity of food pictured in ads was not statistically significant, disproving Hypothesis 5. We found that the United Kingdom carried and advertised higher quality food in its advertisements than in the United States and China, and the data proved to be marginally statistically significant. We found that the variance in price incidents proved to be marginally insignificant. We concluded that McDonald's advertisements in the United Kingdom placed a higher emphasis on socialization rather than product, which we found to be marginally significant. McDonald's advertisements in the United States have a greater focus on branding than the McDonald's in the United Kingdom and China, and we found this to be marginally statistically significant. McDonald's in the United Kingdom was determined to contain equal emotional appeal to the McDonald's in the United States and China due to the marginal statistical insignificance concerning emotional branding.

McDonald's in the United States is currently in a highly saturated, mature market filled with fierce competition. Fast-food and fast-service restaurants are constantly being developed and are entering the market. Although there are many fast-food offerings in America, such as Burger King, Wendy's, and the Yum Brand restaurants, McDonald's maintains a significant share of the market. The plethora of strong competition has resulted in a low potential for growth in the market due to the variety of fast-food options. McDonald's in the United States would therefore be categorized as a cash cow in the Boston Consulting Group Matrix. Despite low sales growth, the company enjoys

its large market share and is able to maintain a stable profit in operation. McDonald's can remain in this favorable position by continuing to expand its menu and offerings. Creating new menu items to target specific segments of consumers would be a valuable tactic for the company to continue as a cash cow fast-food restaurant. McDonald's in the United States has attempted to do this by offering healthier options on its menu such as salads and fruit (Demarrais, August 2003). This change to the menu targets the growing nutrition-conscious segment of consumers who are looking for low calorie, healthy alternatives in their food choices. Additionally, in 2016, McDonald's began to implement plans to revamp its McCafe offerings to increase its appeal to caffeine consumers (McDonald's relauches McCafe, September, 2017). This new offering could place McDonald's as a legitimate competitor of Starbucks and Dunkin Doughnuts. The thriving gourmet and designer coffee market is an important segment of consumers that McDonald's is working to address in an attempt to increase its sales. If McDonald's continues to adapt to emerging consumer preferences, it has the ability to generate a large profit in the United States and in the various other countries in which it operates in.

McDonald's in the United Kingdom fast food market has been dominant, especially in comparison with the United States and China. McDonald's is the leader in consumer foodservice in the United Kingdom, boasting a 4% value share (McDonald's United Kingdom in Consumer Foodservice, May 2016). Particularly, a lack of midmarket food competitors and other large fast food companies, like KFC in China, have led to McDonald's supremacy in the United Kingdom fast food business. Therefore, McDonald's United Kingdom has a high market share and also has sustained high growth in recent years, classifying them as a star in the United Kingdom fast food market according to the Boston Consulting Matrix. McDonald's in the United Kingdom is striving to continue its growth by increasing the quality of their food and customer dining experience (McDonald's United Kingdom in Consumer Foodservice, May 2016). Modernizing locations to achieve a more sophisticated restaurant feel, providing local products such as their beef from 16,000 local farms, and enforcing the growth of their delivery through UberEats are all ways that McDonald's looks to maintain their high growth, high market share position in the United Kingdom (Baccardax, October 2017).

In analyzing the McDonald's brand within the context of the Boston Consulting Group Matrix, the overall economic development of China suggests that there is a high growth potential for the fast food and fast casual market in the country. Therefore, McDonald's in China can best be categorized as a question mark due to the company's low market share in a high growth bracket, especially in China's major cities and emerging urban areas. The "question mark" name suggests that the company's opportunity to become a well-established, profitable company in the country is still largely in question because of its low market share. However, the higher growth in the fast food industry in comparison to other countries suggest there is still plenty of opportunity. In examining McDonald's within the context of a traditional positioning map, the company can best be positioned towards a lower price, but with higher differentiation. The lower price point for the company is meant to put a tighter bind on McDonald's main competitors, including Yum Brands and smaller fast food chains that exclusively serve in China. Additionally, the

differentiation of their product offerings such as the Big Mac, Filet of Fish, and Sausage, Egg, and Cheese McMuffin place the company in higher differentiation bracket in comparison to more traditional Asian fast food restaurants. When examining the product life cycle of various McDonald's China products, the fried chicken and green tea products are still in the growth phases, as they were introduced to the menu to primarily serve as an alternative to compete against the fried chicken of KFC, the country's most frequented fast food chain.

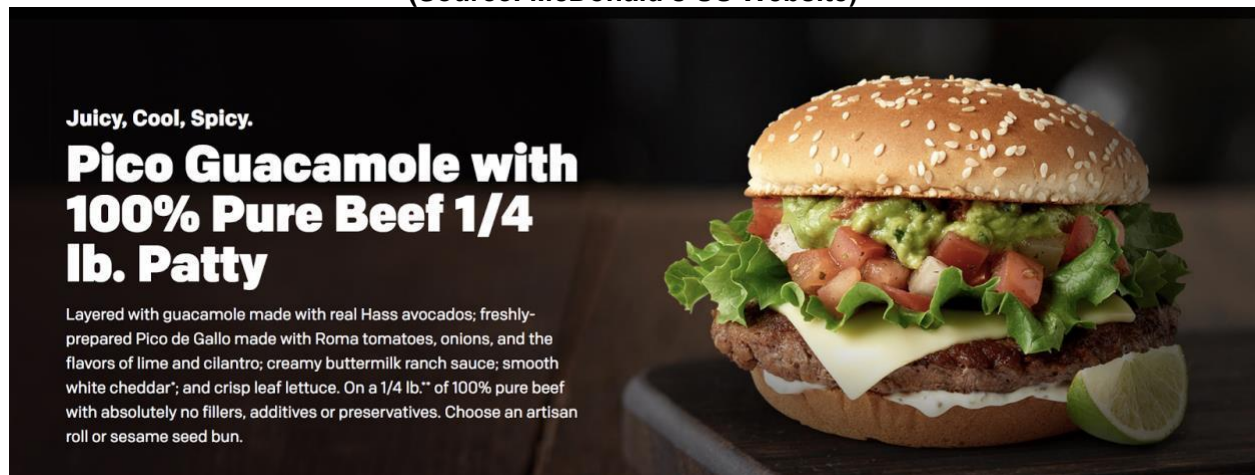
## **CONCLUSION**

Ultimately, McDonald's in the United States, the United Kingdom, and China has the potential to be one of the most prolific brands in each respective country. McDonald's is aware of the different types of consumers around the world and has employed its resources to market its products accordingly to satisfy various customer needs. The company's ability to adapt to differing and changing consumer preferences allows it to continue as an extremely successful brand.

## Appendix A

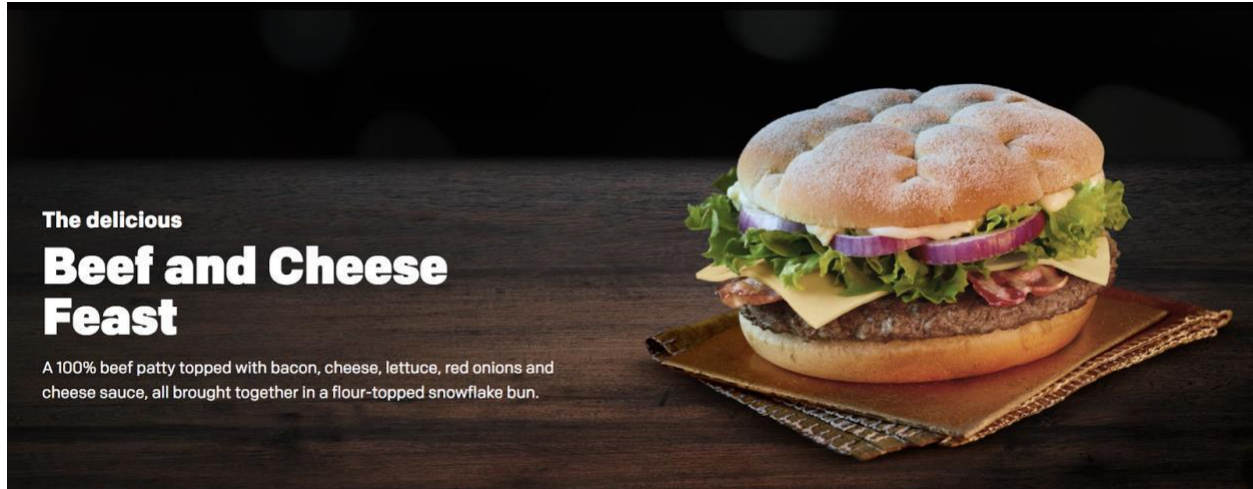


(Source: McDonald's US Website)

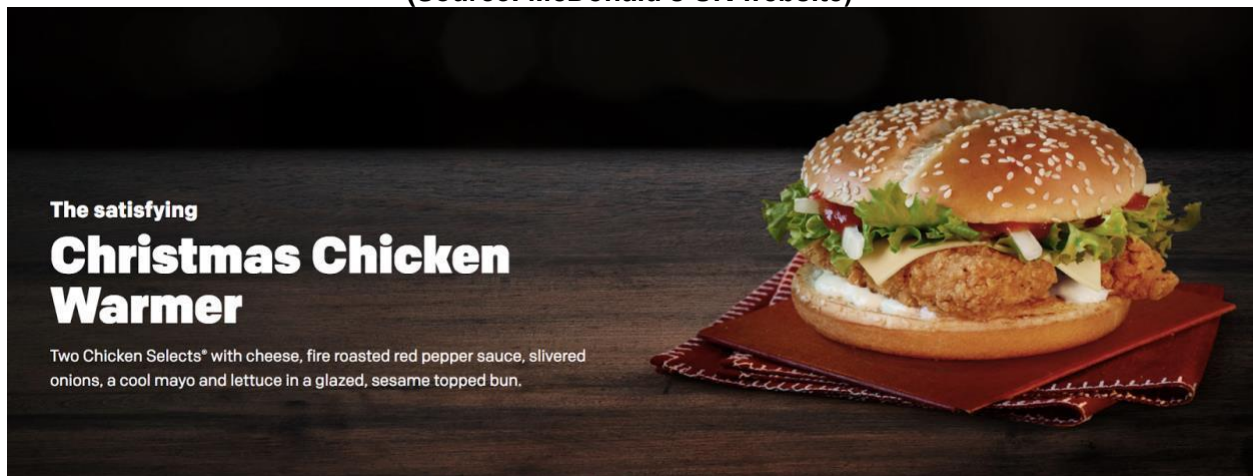


(Source: McDonald's US Website)

## Appendix B



(Source: McDonald's UK website)



(Source: McDonald's UK website)



## Appendix C



(Source: McDonald's Hong Kong Website)



(Source: McDonald's Hong Kong Website)

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