

Television Advertising in the Arab World: A Status Report

MORRIS KALLINY

Missouri University of
Science and
Technology
kalliny@mst.edu

GRACE DAGHER

The University of
Texas-Pan American
gkdagher@panam.edu

MICHAEL S. MINOR

The University of
Texas-Pan American
msminor@hotmail.com

GILBERTO DE LOS SANTOS

The University of
Texas-Pan American
gdelossanto@panam.edu

This article reviews the current status of advertising in the Arab world with special attention given to television advertising. After providing a review of the literature and the status of television advertising, we provide the results of a content analysis dealing with various cultural values used in television advertising in various countries in the Arab world. This article points out that the potential for television advertising is enormous due to the proliferation of satellite television across the Arab world. This study finds that despite the common belief that the Arab world is vastly different from the United States, there are some similarities between the two in television advertising.

INTRODUCTION

Our stereotypical view of the Middle East may be composed of a mosaic of images: Egyptian pyramids, oil gushing from the sands, tiny, but wealthy emirates, and Muslim extremists. We will argue that the situation in advertising there is equally rich, diverse, and complicated.

The traditional view, perhaps, is that the Middle East is not media-rich. For example, Al-Makaty, Van Tubergen, Whitlow, and Boyd (1996) argued that television advertising until recently was virtually unknown in the Saudi Arabian home, except for about 30 percent of the population in the Eastern Province who could receive broadcasts from neighboring states such as Bahrain and the United Arab Emirates (U.A.E.). This was not so much due to a lack of television sets in Saudi homes, as to the fact that prior to 1986 the government of Saudi Arabia did not open its national television system to commercial advertising (Al-Makaty, Van Tubergen, Whitlow, and Boyd, 1996).

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The situation, however, has changed significantly since the publication of Al-Makaty, Van Tubergen, Whitlow, and Boyd in 1996. Consulting firm Booz

Allen Hamilton (2007) found that the Arab media market, in terms of television viewership, is strong and flourishing. Entertainment and leisure television advertising placements are high in the Middle East. The report also concluded that demand for and consumption of TV broadcasting is clearly higher in the Middle East than in most developed countries. In addition, Booz Allen Hamilton considers that this is an industry that is generating momentum, with measured year on year increases. The study also found that competition has intensified due to the rapid proliferation of TV stations (Booz Allen Hamilton, 2007).

According to the Arab Advisers Group, advertising rates are comparatively low for Arab satellite television due to the lack of a consistent rating system. The Arab Advisers Group believes that lack of a television rating system diminishes the bargaining power of TV stations and as a result TV commercials are at a low price. In 2007, the average advertising rate for a free-to-air satellite TV channel in the Arab world was \$3,698 for a 30-second advertisement during peak time. Jawad Abbassi, the general manager of Arab Advisers group, stated that the number of FTA (Free to Air) satellite TV channels in the Arab region continues to increase dramatically (Variety.com).

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These preceding studies point to one thing and that is a dramatic increase in TV, and TV advertising opportunities, in the region. The increased number of satellite channels is likely to increase competition and provide more options for companies to advertise their products. This increased competition is likely to drive advertising price rates down, making it possible for more companies to use this medium to bring their products to the consumer.

Internet advertising opportunities exist as well. For example, currently 17.4 percent of the Middle Eastern population uses the internet, which is more or less comparable to the world average of 20.1 percent internet usage, and usage has increased rapidly. From 2000-2007 the increase in Middle Eastern internet usage (920.2 percent) easily eclipsed the world average increase of 259.6 percent over the same period (Internet World Stats, 2008).

SATELLITE TV IN THE ARAB WORLD

The use of satellites for direct broadcast television is recent in the Arab world. The ARABSAT system was considerably undersubscribed until the beginning of the 1990s. Now many people living in the Middle East region have access to other Arab international television networks without any kind of censorship, control, and/or government approval of the content as compared to the earlier situation.

The history of televised news and particularly satellite TV news in the Middle East is a fascinating one. Early news broad-

casts relied mainly on simple regurgitation of state activity such as presidents giving prepared speeches, inaugurating some new public work, or returning from a trip abroad without providing much analysis or variety. This approach to TV news reporting provided inadequate perspective on major international news. In addition, the limited range of terrestrial television prevented viewers in the Arab world from access to reporting from abroad. According to Amin (1996), "the official function of the media in the Arab world can be understood in terms of the following sequence of priorities: conveying news and information, interpreting and commenting on events, reinforcing social norms and cultural awareness, providing specialized data for commercial promotion, and, finally entertainment" (p. 102).

According to Yalglobal Online, however, beginning with the U.S.-led invasion of Iraq in 1991, the climate for satellite news distribution improved and expanded rapidly. Relying on propaganda issuing from Iraqi Radio was not acceptable to the majority of the Arab community, leading to the picking up of CNN news and other English language satellite broadcasts. This eventually led to demand for Arab satellite networks. In Saudi Arabia, Egypt, and other Arab nations, meaningful journalism, practiced by correspondents in the Middle East and elsewhere, evolved. This brand of reporting used a different approach by offering analysis and reputable facts compared to the hyper-

politicized media climate of before. Powerful TV channels such as Al-Jazeera emerged as a nationally-funded, but not state-controlled television channel, narrated in Arabic and now in English with a focus on regional and international news. The success of Al-Jazeera has given purpose and encouragement to the existence of other satellite channels such as Al Arabiya.

In a short time, dishes and a number of entertainment satellite channels were proliferating across most of the Arab world. The expansion of dish use provided Al Jazeera with a rapidly growing mass audience, now estimated at more than 50 million viewers. Because Al Jazeera is a news operation around the clock, it quickly captured the leadership position in Arab satellite broadcasting. This leadership position was not significantly challenged until just before the invasion of Iraq, when the MBC group launched Al Arabiya. The MBC group started TV news coverage in a limited news bulletin format back in 1992. The competition between Al Jazeera and Al Arabiya has had a positive effect. Arab satellite television journalists are less likely to indulge their personal ideological views on the news when they know a more objective and reliable version of the same event is available on another TV channel.

According to AME Info (2006), by October 2006 the total number of free to air satellite channels broadcasting on Arabsat and Nilesat reached 263, growing by 163 percent since January 2004. 73.8 percent of the FTA satellite channels are privately owned. This is attributable to the increase in the number of countries allowing private ownership in the Arab region. Arab Advisors Group's analysis reveals that over 90 percent of FTA satellite channels include programs in Arabic. The gulf countries host the highest number of Arab FTA satellite channels, encompassing close to half of the total channels targeting the region.

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TV ADVERTISING AND CULTURAL DIFFERENCES

A wealth of literature has appeared on cross-cultural differences in advertising content (e.g., Abernethy and Franke, 1996; Albers-Miller and Gelb, 1996; Al-Olayan and Karande, 2000; Cutler and Javalgi, 1992; Davis, 2003; Gilly, 1988; Hong, Muderrisoglu, and Zinkhan, 1987; Lin, 1993). Some of these studies focused on comparisons in advertising expression between the United States and similar cultures (e.g., Dowling, 1980; Weinberger and Spotts, 1989), while other studies compared advertising content across dissimilar cultures such as the United States and Japan (Hong, Muderrisoglu, and Zinkhan, 1987; Javalgi, Cutler, and Malhotra, 1995; Mueller, 1987). Most of this literature is U.S. centric: Abernethy and Franke (1996) concluded that 40 out of the 59 content analysis studies they investigated dealt with the U.S. media. Abernethy and Franke (1996) stated, "Much less is known about advertising information in other countries. For example, no study has examined the advertising information in any African nation, any part of the Middle East other than Saudi Arabia, or any of the 'economies in transition' associated with the former USSR" (p. 15). We could find only one study regarding the Middle East since the publication of Abernethy and Franke's meta analysis in 1996 (Al-Olayan and Karande, 2000), nor could we find a single investigation of Arab world television advertising. A recent survey confirms this lack of attention to Arab advertising (Taylor, 2005).

Given this dearth, we echo the call of scholars such as Abernethy and Franke (1996) and Al-Olayan and Karande (2000) for more studies comparing advertising content across countries, especially the neglected parts of the world such as the Arab countries. In response to this need, the primary purpose of this study is to report on similarities and differences in the televised manifestation of cultural and religious values in the contemporary United States and several Arab countries (Saudi Arabia, Egypt, U.A.E., and Lebanon). We selected these Arab countries for two main reasons. First, we believe that the Arab countries can be placed on a roughly liberal-conservative continuum with regard to cultural values, and selecting these countries will allow us to test this notion. Second, the Arab states are located in two main different geographical locations: Africa (Algeria, Egypt, Eritrea, Djibouti, Libya, Mauritania, Morocco, Somalia, Sudan, and Tunisia), and Asia [Bahrain, Iraq, Jordan, Kuwait, Lebanon, Oman, Palestine (the Gaza strip and West Bank), Qatar, Saudi Arabia, Syria, U.A.E., and Yemen]. The Asian countries are often subdivided into the Gulf States (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and U.A.E.) and others. Our country sample draws from the African group, the Asian group, and the Gulf State subgroup of the Asian states.

CULTURAL AND RELIGIOUS DIFFERENCES

The understanding of cultural differences is often considered a prerequisite for suc-

cessful international advertising (Keegan, 2008) because consumers grow up in a particular culture and become aligned with that culture's value system as well as beliefs and perception processes. Several studies have shown that consumers are more inclined to respond to advertisements that are congruent with their culture (Boddeyn, Soehl, and Picard, 1986; Buzzell, 1968; Harris, 1984).

The value system includes sets of beliefs, attitudes, and activities to which a culture or subculture subscribes and is reinforced by rewards and punishments for those who follow or deviate from these guidelines (Rokeach, 1973). The Arab culture is based on Islam, which is the major religion in all Arab countries except for Lebanon. Stone (2002) stated, "Whatever is happening in the Islamic world whether in its collective manifestations or in individual Islamic countries and populations is a product of the commonality of attitudes and sentiments, which Islam imposes" (p. 123). Kabasakal and Bodur (2002) stated, "All sects accept the Koran as the holy book and adhere to its requirements. The Koran has been a unifying force that strongly influences societal practices and acts as a driver towards creating a common culture in the Arab cluster" (p. 44). Homogeneity in the Arab countries can also be attributed to historical circumstances. Cleveland (1964) argues that for many years the Arab countries were unified under different Muslim caliphates such as *Omayyads*, *Abbasids*, and *Ottomans*, and until the beginning of the 20th century were a single nation. This unification has contributed to a similarity of thinking between most Arabs across the Middle East.

Although it is impossible to generalize about all or most cultural values across the Arab world, beliefs and attitudes are shared by many Arabs that seem to cross national and social class boundaries (Wilson, 1996). One such commonality is

the central role of Islam. The language, social structure, and economic philosophy are fully grounded in Islam because Islam is considered a complete way of life (Kavoossi, 2000; Lawrence, 1998). There is a fine line between what is religious and what is cultural in the Arab world. Shari'a (Islamic Law) is viewed as a comprehensive code governing all areas of a Muslim's life such as duties, morals and behavior, and commerce (Luqmani, Yavas, and Quraeshi, 1989). The Shari'a describes the values Muslims should hold, such as truth, justice, individual freedom, honesty, social obligations, collective responsibility, the roles of men and women, and the role of buying and selling. Thus, the Shari'a prescribes all that one should do (Coulson, 1964); therefore, the cultural value system of the Arabs is derived from and guided by Islamic religious beliefs (Anastos, Bedos, and Seaman, 1980).

It would be naïve, however, to assume that all Arab countries are uniform. Although Arabs share many commonalities, they also differ in numerous respects such as degree of religious commitment (Nydel, 1987), wealth, and education level (Lamb, 1987). Further, although the Arabic grammatical system and written language are uniform across all Arab countries (Al-Olayan and Karande, 2000), there are as many as 20 different spoken dialects.

EXAMPLES OF CULTURAL AND RELIGIOUS DIFFERENCES AND THEIR IMPACT ON ADVERTISING

Depiction of women and gender use (modesty)

Islam stresses that women should dress modestly and encourages women not to show too much of their bodies in public. In some countries, such as Saudi Arabia, the law enforces the teachings of Islam. Surat Al-Noor-Aih-31 in the Holy Koran addressed the issue of women's modesty by stating:

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And say to the believing women that they should lower their gaze and guard their modesty; that they should not display their beauty and ornaments except what ordinarily appear thereof that they should draw their veils over their bosoms and not display their beauty except to their husbands, their fathers.

Scholars have interpreted this Koran passage differently, but most scholars take this message to mean that women may show only their hands and face to men outside of their immediate family. Stricter scholars conclude that women should be completely veiled. For example, Saudi women are not allowed to walk in the streets with their faces uncovered. Al-Olayan and Karande (2000) found women wearing long clothing in 83 percent of Arabic magazine advertisements showing women, compared to 29 percent in U.S. advertisements.

But inter-Arab differences are significant. In Lebanon, Egypt, and U.A.E., it is left to the family to decide whether a woman should cover her face in public or not. In Saudi Arabia and U.A.E., businesses must close for prayer while this requirement does not exist in Egypt or Lebanon. Additionally, although Islam is the common religion, Islam is not the only religion that exists in the region. For example, about 50 percent of Lebanon's population is Arab-Christian and about 10 percent of the Egyptian population is Arab-Christian. Because of these differ-

ences, we posit that the Arab countries could be placed on a continuum with regard to attitudes toward modesty, with Lebanon anchoring the most-liberal extreme, Egypt and UAE in the middle, and Saudi Arabia being the least liberal of the Arab nations.

The American value system, on the other hand, is based predominantly on Christian beliefs. Although there are certain values that advertising agencies should adhere to when producing their advertisements, these requirements are much less stringent in comparison to Arab world values. Gilly (1988) argues that differences among countries can be expected in the portrayal of women in advertising. Differences in the depiction of women are hypothesized based on the role of religion in forming values and religious obligations (Luqmani, Yavas, and Quraeshi, 1989).

We tested these and the notions discussed below in a study that compared 721 Arab television commercials from Egypt, Lebanon, Saudi Arabia, and U.A.E. against each other, and also compared them to the United States. A sample of 12 hours of programming was videotaped in each of the countries. Two guidelines were followed in selecting television channels to be taped: (1) the channel had to be broadcast nationwide, and (2) the network could be accessed for free and no subscription of any kind was required. Based on these conditions we chose CBS in the United States, Channel 2 in Egypt, Lebanese Broadcasting Corporation (LBC)

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in Lebanon, Saudi TV in Saudi Arabia, and Dubai Channel in U.A.E.

One hundred and fifty television advertisements were used from each of the United States, Lebanon, and Egypt, 144 from Saudi Arabia, and 127 from U.A.E. Six variables were analyzed in this study: gender use, gender modesty, advertisement purpose (hedonic versus utilitarian), information content, price information, and whether the advertisement is comparative. Three U.S. undergraduate students coded the U.S. advertisements. Three bilingual Middle Eastern students, two graduates and one undergraduate, coded the Lebanese, Egyptian, Saudi Arabia, and U.A.E. advertisements. All coders were trained prior to coding. To test the hypotheses, multivariate analysis of variance (MANOVA) was used (Field, 2000).

We found that the majority of women appearing in Arab TV advertising are dressed more modestly compared to those of the United States. There were major differences among the Arab countries where Egypt and Lebanon were found to depict women who are dressed less modestly than Saudi Arabia and U.A.E. Although veiled women can be found in Egypt and Lebanon, most other forms of clothing are also acceptable. For example, wearing a swim suit or even a bikini in these two countries is acceptable. Egypt and Lebanon have a tradition of belly-dancing where female bellydancers wear minimal clothing.

Occupational roles (female)

The role of women in advertising has been a matter of interest for a number of researchers (Gilly, 1988; Schneider and Schneider, 1979). The main issue we focus on here is how women are depicted in terms of occupation. In prior studies, U.S. women were predominantly depicted in advertising to be at home (Gilly, 1988), unemployed, or employed in traditional female occupations (Schneider and Schneider, 1979). But a more recent study by Allan and Coltrane (1996) found a decrease in the number of women portrayed at home.

Personal law based on Shari'a offers women an inferior status (Masid, 2002). The Islamic law requires a married woman to obtain her husband's permission before going outside the house and that includes going to work as well (Jones-Pauly, 1999). In strict adherence Muslim women need their husbands' permission to conduct almost any action, and it is the husband's decision whether to enforce his right (Masid, 2002). So the depiction of women as housewives in the Arab countries may be accurate. For example, El-Hamidi (2003) argues that females in Egypt, although representing at least half the population, only account for 27 percent of the workforce, and this phenomenon is prevalent throughout the Arab countries. We believe that this phenomenon is probably more prevalent among Arab countries that have high commitment to Islam and Islamic law.

Data analysis revealed that all the Arab countries were less likely to portray women as working or outside the house than in U.S. advertising. The difference was significant in the case of Lebanon and U.A.E. There is a strong movement across the majority of the Arab countries to educate women and introduce them to the work force where they can also contribute to the economic growth of their nation. This may be a factor in these commercials.

Hedonic versus utilitarian values

Utilitarian values correspond to Maslow's (1954) basic physiological needs including food, clothing, and shelter. Hedonic consumption values involve fun, enjoyment, and gratification. Many variables can play a role here. We argue that the level of economic development of a country helps determine which value is given preference. We argue that consumers in developed countries are more likely to be interested in satisfying hedonic wants. On the other hand, consumers in developing countries will focus their attention on satisfying basic needs (Tse, Belk, and Zhou, 1989). Egypt's per capita GDP is \$4,400, Lebanon's is \$5,100, Saudi Arabia's is \$12,900, U.A.E.'s is \$29,100, and that of the United States is \$41,800 (World Factbook, 2006). The difference between GDP per capita in Egypt and the U.A.E. is dramatic. We anticipate that advertising will reflect this difference. We expect businesses to use a more utilitarian approach to advertising in the poor countries while using more of the hedonic approach to advertising in the higher economically developed countries. More concretely, the higher the GDP per capita, the more hedonic will be the advertisements.

From this study, it seems that there is an emphasis on hedonic values in Arab world television advertising. For three of the four Arab countries, there was more

emphasis on hedonic values than for the United States (except for Lebanon), and there was a statistically significant difference between Saudi Arabia and the United States, and the U.A.E. and the United States. In the less wealthy countries such as Egypt and Lebanon, advertisements were significantly less hedonic than for their rich counterparts of Saudi Arabia and U.A.E.

Communication

The Arab culture is high context, meaning the communication style is embedded in the context of the message; therefore, the listener must understand the contextual cues in order to interpret the meaning of the message. Emotions are an important part of the Arab communication style (Anwar and Chaker, 2003). In the Arab culture, brevity of expression is desirable and speeches that use few words, but are dense with meaning, are considered the best speeches. The Arabic audience does not require a great deal of information from advertising or explicit details of the product being presented (Biswas, Olsen, and Carlet, 1992). Al-Olayan and Karande (2000) argue that because the Arabic society is highly collectivist, people do not depend much on advertisements to get information about a product, but rather use other sources such as extended family members and friends.

On the other hand, the American culture is low context. U.S. customers rely more on direct communication. According to Biswas, Olsen, and Carlet (1992) and Mueller (1987), because American consumers are interested in more information and details, the American consumer seeks more information from advertisements. Al-Olayan and Karande (2000) found that Arabic magazine advertisements contained fewer information cues compared to American magazine advertisements. Lin (1993) and Mueller (1987)

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found that advertisements in low-context cultures included more information than in high-context cultures. Our results indicated that Arab TV advertising contained fewer information cues compared to the United States.

Price appeal

Bargaining is practiced daily in the Arab world. Al-Olayan and Karande (2000) argue that this bargaining phenomenon still exists in the Arab world because many businesses are either individual or family owned, and these owners are more likely to negotiate prices. In the preceding section, we suggested that the Arab culture is high context and being too direct may not be desirable. The same argument can be used for stating prices in advertisements. Mentioning prices in television advertisements may be less desirable because it can be viewed as too direct and rude (Lin, 1993). For the United States, however, the situation is different. The United States is a low-context culture and being direct is desirable. Cutler and Javalgi (1992) and Javalgi, Cutler, and Malhotra (1995) found that price information in advertising is a major appeal for American buyers. Results from this study indicated that Middle East television advertisements avoid including price information in their commercials.

Comparative advertisements

According to Hofstede (1984), the Arab world is traditionally a highly collectivist society. Ibn Khaldun (1967) addressed the concept of *asabiyya* in the Arab countries as a type of solidarity among the group that is based on blood or a strong bond of mutual affection among the members of the group, which make them willing to fight and die for one another.

One can argue that the collectivist concept in the Arab world has been strongly impacted by the teachings of Islam. Al-Olayan and Karande (2000) argue that behavior in the Arab world toward others is influenced by messages in the Shari'a, which encourage people not to compete at the cost of harming others. Prophet Muhammad stressed this issue by stating, "None of you truly believes until he loves for his brother what he loves for himself" and "A Muslim is the one who avoids harming Muslims with his tongue and hands" (quoted in Al-Olayan and Karande, 2000, p. 72). Although the same concept was also emphasized in the Bible in Matthew 5:43, Muslims seem to hold this idea of collectivism more closely. This is consistent with Hofstede's (1984) work, which showed the United States to have the highest score for individualism. Against this background, we expect that comparative advertising will be less prevalent in

the Arab world because unfavorable comparisons may cause harm to a Muslim. On the other hand, we find the use of comparative advertising is encouraged by the Federal Trade Commission in the United States (Cutler and Javalgi, 1992). Our study reveals that comparative advertisements are seldom used in the Arab countries.

CONCLUSION

Although there are some similarities between Arab and U.S. advertising, there are significant differences. For example, although there was no significant difference between the U.S. advertisements and the Arab advertisements regarding the depiction of women, Arab advertisements do tend to be more conservative in the matter of dress. Arab advertisements tend to include less price information, use less direct comparative advertising, and provide fewer information cues than U.S. advertisements.

Further, while there is some consistency in the execution approaches used across Arab countries (e.g., use of comparative advertisements, information cues, and extent to which price information is given), there are actually significant differences. For example, all Saudi Arabian women and a high percentage of U.A.E. women in our sample of advertisements appeared to be veiled while the majority of Egyptian and Lebanese women appeared to be unveiled. Moreover, there seemed to be a difference in the purposes of advertisements across Arab countries. Saudi Arabian and U.A.E. advertisements appeared to display more hedonic values than Egyptian or Lebanese advertisements.

Some differences that we expected to find did not appear. The posited difference in the likelihood of women being portrayed as housewives was not supported; our hypothesis on hedonic values was also not supported. Other hypoth-

eses were only partially supported. We find sharp differences (but also similarities) between the Arab world and the United States. We also find quite a lot of diversity within the Arab world.

The results of this study provide an interesting look at cultural and religious influences on advertising. For example, we expected to find more women to be depicted in U.S. advertisements compared to the Arab advertisements, but this hypothesis was only partially supported. Consistent with past studies (see Al-Olayan and Karande, 2000; Gilly, 1988), our findings suggest that advertisements used in one country cannot simply be directly translated for use in another. For example, an advertisement that clearly violates an Islamic teaching may be viewed negatively and have an adverse effect (but this effect may vary by country).

Luqmani, Yavas, and Quraeshi (1989) stated that a major tea company alienated Saudi customers after it aired a commercial that showed a Saudi host serving tea with his left hand to one of his guests. Moreover, the guest was wearing shoes while seated, which is considered disrespectful by traditional Saudis. This example points out the crucial role that local customs and traditions play in the daily life of the Saudi Arabian citizens. Lack of understanding of these cultural differences can lead to significant losses of business opportunities. Understanding these cultural differences will allow U.S. and other foreign firms to design and execute advertising campaigns that are more effective by taking into consideration the sensitive cultural and religious issues in the Arab world.

MORRIS KALLINY (Ph.D., University of Texas-Pan American) is an assistant professor of marketing and business program director at Missouri University of Science and Technology. His research has focused on cross-cultural marketing with special attention given to

international advertising. Dr. Kalliny's work has previously been published in the *Journal of Current Issues and Research in Advertising*, the *International Journal of Cross Cultural Management*, the *Journal of Marketing for Higher Education*, the *Marketing Management Journal*, and many others.

GRACE K. DAGHER is a Ph.D. candidate in international business/management at the College of Business Administration at The University of Texas-Pan American. Her research interests include cross-cultural behavior, personality, multicultural teams, and entrepreneurship.

MICHAEL S. MINOR (Ph.D., Vanderbilt University) is a professor of marketing and international business at the University of Texas-Pan American. His current interests are in consumer behavior, design and aesthetics, social networks, and robotics. He has published in *CyberPsychology and Behavior*, *Psychology and Marketing*, the *Journal of International Business Studies*, the *Journal of Services Marketing*, *Marketing Management Journal*, and elsewhere, and he is the coauthor of textbooks in consumer behavior and international business.

GILBERTO DE LOS SANTOS (Ph.D., The University of Texas at Austin) is a retired professor of marketing from The University of Texas-Pan American. He has 99 publications and has served as a marketing consultant to over 150 local, state, national, and international businesses. His specialties are advertising and professional selling.

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