CHAPTER 26

Stage 1
Problem definition

Stage 2
Research approach developed

Stage 3
Research design developed

Stage 4
Fieldwork or data collection

Stage 5
Data preparation and analysis

Stage 6
Report preparation and presentation

International marketing research

Objectives

After reading this chapter, you should be able to:

1 develop a framework for conducting international marketing research;

2 explain in detail the marketing, governmental, legal, economic, structural, informational and technological, and socio-cultural environmental factors and how they have an impact on international marketing research;

3 describe characteristics of the use of secondary data, qualitative techniques, telephone, personal and mail survey methods in different countries;

4 discuss how to establish the equivalence of scales and measures, including construct, operational, scalar and linguistic equivalence;

5 describe the processes of back translation and parallel translation in translating a questionnaire into a different language;

6 discuss the ethical considerations in international marketing research.

Marketing across national boundaries remains one of the most difficult activities for many manufacturers in many product and service areas. Likewise, the research problems involved in multi-country coordination can be formidable.[1]

Overview

This chapter starts by evaluating the need for international marketing research. It then discusses the environment in which international marketing research is conducted, focusing on the marketing, government, legal, economic, structural, informational and technological, and socio-cultural environment.[2] Although illustrations of how the six steps of the marketing research process should be implemented in an international setting have been presented in earlier chapters, here we present additional details on secondary data, qualitative techniques, survey methods, scaling techniques and questionnaire translation. Relevant ethical issues in international marketing research are identified. We begin with some examples illustrating the role of marketing research in international marketing. The first example illustrates the use of ethnographic techniques, as introduced in Chapter 6. It also illustrates the point that research techniques may have to be adapted and developed to suit the nature of consumers in different cultures. The second example illustrates the great potential in international markets and some of the technical challenges that must be overcome to conduct good quality marketing research.

example

Tasty wisdom[3]

'The most accurate research is done for pet food companies because it is not possible to ask pets what they think, only observe what they do.' Such an approach is just as feasible with humans! Economies of scale may be driving some research companies to harmonise their methodologies when conducting international marketing research, but Nestlé decided it needed more than just traditional focus groups to understand why its products were not thriving in Russia. It needed an ethnographic study of culinary habits to help develop a unified marketing approach. Incorporating video observation into a study of cooking habits by Russian housewives enabled Nestlé to sift out how people see themselves versus how they really are. Nestlé's study, using a range of different techniques, unmasked the myth of the creative cook interested in exotic recipes. The food giant reviewed its product portfolio accordingly. ■

example

Breaking down the great wall[4]

Although it has never been easy to do business in China, few multinationals have been able to resist the lure of potentially huge growth in the largest untapped market on earth. Research proved essential in tackling this unknown region, and international marketing research networks followed fast on the heels of their clients, while local agencies mushroomed. However, curbs on marketing research have made it even harder to conduct business.

Any survey conducted for or carried out by a company with foreign investment now has to be cleared twice by the authorities: once when the questionnaire is drafted and again before findings are handed over to the client. Marketing research sources believe China is more concerned with social than with consumer research. 'China is not ready for published opinion polling,' one Hong Kong based researcher said. Another, based in mainland China, said: 'after they check all the projects, maybe they will think "this is about washing powder, this is about TV sets. It has no relation to national security at all".'

In recent years, timely research has become even more important: the competition has been hotting up while the economy has been slowing down. The time added on to projects (around a week) is a real hindrance. Perhaps even more worrying is the handling of data. Despite State Statistical Bureau promises to safeguard the data, clients point out the office is undermanned. 'You really don't know how confidential it is. You do your research and submit your report to the bureau, there's a probability for a research study to leak out to a competitor.' ■

Another example comes from the many technical challenges in the GlobalCash study which was conducted in 20 countries across Europe. The following example illustrates the dilemma faced over just one question in the questionnaire that was developed.

example
GlobalCash Project

Open or closed questions?[5]

In the development of codes for a questionnaire, it is a simple task to assign numbers to closed questions such as 'do you use netting systems?', assigning '1' to a *yes* response and '2' to a *no*. In the GlobalCash study a coding problem arose in a question that was open-ended in presentation but in reality was a closed list of banks and software companies. As an open-ended question, a single line was needed to establish a lead bank used in 21 European countries. If the question was presented in a closed format with boxes to tick, it would have had to cope with over 350 banks in Germany, 250 in Switzerland, 200 in France, 200 in Italy and 180 in Britain, to start with. As well as being too cumbersome for the respondent, there might have been some confusion as to the correct name or initials of a bank which may be used within a particular country. Banks may also have merged and respondents may use the pre-merger bank name. Each business school had to 'translate' the shorthand versions of bank names used by respondents in their country. Thus there was much work that had to be done to code the open-ended question, but the alternative of creating a closed question both would have been cumbersome to the respondent and would miss the cultural nuances of how they name the banks they work with. ■

What is international marketing research?

The term international marketing research can be used very broadly. It denotes research for true international products (international research), research carried out in a country other than the country of the research-commissioning organisation (foreign research), research conducted in all important countries where the company is represented (multinational research), and research conducted in and across different cultures (cross-cultural research). The latter category of cross-cultural research does not have to cross national boundaries. Many European countries have a vast array of ethnic groups, giving the marketing researcher many challenges in understanding consumers in these groups within their home country. The following example is a brief illustration of the array of problems faced by researchers working in a London local authority.

example

Qualitative research among ethnic minority communities in Britain[6]

Although the language barrier remains a problem among non-English speaking minorities in Britain, communicating or conducting research with them can still be done provided their traditional patterns of behaviour are observed. Two examples of the issues faced in studies of ethnic minorities in the London Borough of Newham include:

- Is there a difference between the Punjabi spoken by Pakistanis and Indians in Britain? This will depend on the exact area from which the people come: the written forms are entirely different, and the more formal spoken forms may differ too, but there can be no hard and fast rules. Punjabi is the language spoken in the Punjab region of India and Pakistan. Indian Punjabis usually speak Hindi (the national language of India) as well, while Pakistani Punjabis usually speak Urdu (the national language of Pakistan) as well.
- Should one use Bengali or Sylheti for written stimulus directed at the Bangladeshi population? Sylheti is not a written language, so if people from the Sylhet region are literate in their mother tongue, they will read Bengali. ■

The example above supports the contention that, methodologically, there is no difference between domestic and international marketing research. In other words, marketing researchers have to adapt their techniques to their target respondents, and the subtle cultural differences within a country offer the same challenges as the much more apparent differences over thousands of miles. The following example does not present an actual case but the opinions of the respected international marketing researcher Mary Goodyear (MBL). Her views support the contention that there is no difference between domestic and international research but then show why international marketing research should be examined as a distinct subject area.

example

The world over, a group is a group is a group[7]

It has become the convention to talk about international research as if it were a discrete sector of the industry. Methodologically, in qualitative research at least, it is not really very different from what is done at home. A group is a group is a group. However, it is important to realise that international research is different: firstly, in terms of analysing the social and cultural dynamics of the society, how the foreign society is structured, how power is gained and expressed, the roles allotted to men and women, the interactions between different sectors of society and so on; and secondly, in the practical problems involved in organising the research. ■

The first point established in the above example is that many of the cultural and societal assumptions that we take for granted have to be examined. This we discussed when considering how researchers 'see' in Chapter 9, 'Qualitative research: data analysis'. Without such an examination we have the potential to be naive in the questions we pose, whom we pose those questions to, and the manner in which we interpret the answers we generate. The second point reminds us of the features of the infrastructure that supports the research process, features that we may get used to and take for granted. For example, without the benefits of accurate sampling frames, accurate and up-to-date secondary data and reliable and widespread use of telephones, our research plans may be weak. Our whole approach to organising and conducting research in international markets has to reflect these physical conditions.

Overseas expansion has become more important for European companies due to increasing economic integration, the lowering of trade barriers and in some instances intensive competition in domestic markets. International markets such as the vast developing economies of China, India and Russia offer huge prospective returns. As attractive as these markets may be, companies must realise that setting up operations in these countries does not guarantee success. Understanding the nature and scope of these markets is vital to realising the opportunities and presents a major challenge to marketing researchers. This challenge also lies in overcoming the 'red tape' in countries that may well have laws and policies designed to protect their own countries' businesses. Realising the opportunities and overcoming the challenges may mean, at one extreme, that marketing researchers work with decision-makers in their own domestic markets, trying to coordinate research in distant lands. It may mean that companies have operations in overseas markets which extend to indigenous marketing research operations; an example of this is the Indian subsidiary of Unilever.

Unilever's Indian subsidiary has a Marketing Research department that the global group considers to be a laboratory for research in developing markets. The marketing research team is manned by 65 people, including 25 highly respected senior managers, a fieldforce of over 1,600 and an annual budget of over €7 million. The team operates in a wide range of areas, from basic product and advertising testing, to trend forecasting and media research. The urban consumer panel it runs, of 50,000 households in 43 towns, must be one of the largest in the world. The following example illustrates how their rich local knowledge helped to create a successful research programme and financially successful marketing decisions.

example

Mud and lemons[8]

Hindustan Lever Limited (HLL), Unilever's Indian subsidiary, is big in India but has regularly faced competition from small, local entrepreneurs who have competed on price. This was the situation that HLL faced in 1997, when sales of the Vim soap bar for dishwashing had stagnated, being undercut by the Odopic Bar which was selling at half the price of Vim. HLL panicked, but its marketing research department began a general study of consumer behaviour in this category, which found that Vim bar's basic position seemed strong if one looked only at dishwashing bars, but compared with all other products, it wasn't.

Competition came from low-cost detergents, ash, lemons and even mud, which were essentially scourers. They got dishes fairly clean and they were cheap – free, in fact, in the case of ash taken from the residue of cooking. Taking these products into account, Vim's share of the market dropped from 52% to just 8%. Clearly the real issue for HLL was not Odopic, but how to grow the category by encouraging conversions from these dishwashing rivals. To determine consumer attitudes, HLL Marketing Research set up in-depth research projects, which concluded that no-one particularly liked the alternatives to Vim, but their low prices made them hard to resist.

HLL decided to avoid the price game, where the smaller players always had an advantage. Instead it would create a significantly better product for only a small increase in the price, one that would have to be better in quantifiable terms, like the ability to remove grease, and in terms of consumer perceptions. HLL Marketing Research used a sequential recycling technique where product development went hand-in-hand with continuous research with the same group of consumers. HLL and its consumer panel reached a product and price they were satisfied with. The end result was that Vim brand sales rose nearly threefold in the year 2000. ■

It could well be argued that the above example does not represent international marketing research, as it is domestic research conducted by an Indian company. This adds further support to the contention that, methodologically, there is no difference between domestic and international marketing research. For companies with such a global reach as Unilever, whose economies of scale allow them to operate in this manner, their international research does ultimately become a domestic issue. However, for companies without the financial muscle of Unilever that wish to realise the opportunities in international markets, decisions have to be made about how they plan and implement research from their domestic base. To see an example of a strong domestic company seeking opportunities in international markets, go to the Companion Website and read Professional Perspective 19 'The role of marketing research in the international strategies of German trade fair companies' by Bernd Aufderheide. Bernd describes why strategies to exploit international markets became vital to the German trade fair industry and how, in developing these strategies, marketing research plays a vital role.

➤➤➤ *See Professional Perspective 19.*

A framework for international marketing research

Conducting international marketing research can be much more complex than conducting domestic marketing research. Although the basic six-step framework for domestic marketing research is applicable, the environment prevailing in the countries, cultural units or international markets that are being researched influences the way the six steps of the marketing research process should be performed. Figure 26.1 presents a framework for conducting international marketing research.

The differences in the environments of countries, cultural units or foreign markets should be considered when conducting international marketing research. These differences may arise in the marketing, government, legal, economic, structural, informational and technological, and socio-cultural environments, as shown in Figure 26.1.

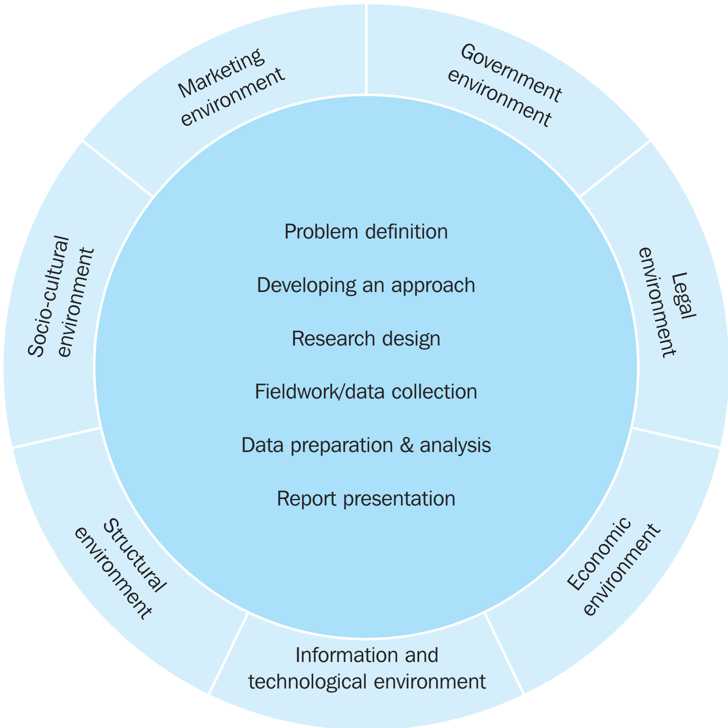

Figure 26.1
A framework for international marketing research

Marketing environment

The role of marketing in economic development varies in different countries. For example, many developing countries are frequently oriented towards production rather than marketing. Demand typically exceeds supply, and there is little concern about customer satisfaction, especially because the level of competition is low. In assessing the marketing environment, the researcher should consider the variety and assortment of products available, pricing policies, government control of media and the public's attitude towards advertising, the efficiency of the distribution system, the level of marketing effort undertaken, and the unsatisfied needs and behaviour of consumers. For example, surveys conducted in Europe usually involve questions on the variety and selection of merchandise. These questions would be inappropriate in many African countries, which are characterised by shortage economies. Likewise, questions about pricing may have to incorporate bargaining as an integral part of the exchange process. Questions about promotion should be modified as well. Television advertising, an extremely important promotion vehicle in Europe, is restricted or prohibited in many countries where TV stations are owned and operated by the government. Certain themes, words and illustrations used in Europe are taboo in some countries. This is illustrated in the following example which describes characteristics of research in the Middle East.

example

Warming responses from the Levant to the Gulf [9]

The Middle East is one of the most fascinating and challenging areas for research. Market research is no longer a novelty for people in the Middle East and is relatively well developed in most countries. Local Arab females' mobility is generally restricted and all interviews have to be conducted at the recruiter's or respondent's home. However, this means that the chances of finding women at home and obtaining an interview from them are much higher than in Europe. Using visuals in research can be problematic if they are not carefully selected before they are sent and presented to local custom. It is particularly essential to control the amount of female skin visually exposed. One should never forget that sexual connotations, verbal as well as visual, are unacceptable in most Middle Eastern countries.

One of the main difficulties encountered in interviewing Arabs (and females in particular) is their natural tendency to want to please others, including researchers. Careful formulation of questions is essential to a fruitful interview or discussion, together with a non-complacent interviewer or moderator. Indeed, true feelings, opinions or preferences are often disguised, if felt to be socially unacceptable: ratings are generally higher, especially when related to product attributes or purchase propensity. ■

Government environment

An additional relevant factor is the government environment. The type of government has a bearing on the emphasis on public policy, regulatory agencies, government incentives and penalties, and investment in government enterprises. Some governments, particularly in developing countries, do not encourage foreign competition. High tariff barriers create disincentives to the efficient use of marketing research approaches. Also, the role of government in setting market controls, developing infrastructure and acting as an entrepreneur should be carefully assessed. The role of government is also crucial in many advanced countries, where government has traditionally worked with industry towards a common national industrial policy. At the tactical level, the government determines tax structures, tariffs and product safety rules and regulations, often imposing special rules and regulations on foreign multinationals and their marketing practices. In many countries, the government may be an important member of the distribution channel. The government purchases essential products on a large scale and then sells them to consumers, perhaps on a rationed basis.

Legal environment

The legal environment encompasses common law, foreign law, international law, transaction law, antitrust, bribery and taxes. From the standpoint of international marketing research, particularly salient are laws related to the elements of the marketing mix. Product laws include those dealing with product quality, packaging, warranty and after-sales service, patents, trademarks and copyright. Laws on pricing deal with price fixing, price discrimination, variable pricing, price controls and retail price maintenance. Distribution laws relate to exclusive territory arrangements, type of channels, and cancellation of distributor or wholesaler agreements. Likewise, laws govern the type of promotional methods that can be employed. Although all countries have laws regulating marketing activities, some countries have only a few laws that are loosely enforced and others have many complicated laws that are strictly enforced. In many countries the legal channels are clogged and the settlement of court cases is prolonged. In addition, home-country laws may also apply while conducting business or marketing research in foreign countries.

Economic environment

Economic environmental characteristics include economic size (gross domestic product, or GDP); level, source, and distribution of income; growth trends; and sectoral trends. A country's stage of economic development determines the size, the degree of modernisation, and the standardisation of its markets. Consumer, industrial and commercial markets become more standardised and consumers' work, leisure and lifestyles become more homogenised by economic development and advances in technology. The following example illustrates the problems inherent in understanding the characteristics of a country's stage of economic development and in forecasting the potential that exists there.

example

The East gets out of the red and into the black[10]

Dr Rudolf Bretschneider, Managing Director of Austrian-based FESSEL-GfK, is credited as the frontiersman in the GfK network (**www.gfk.de**) to make the first bold steps into Eastern Europe: GfK credits itself with being the first Western agency to spot market research potential in the region. Bretschneider cautions against relying too greatly on official economic indicators which, given the substantial size of the black and grey markets, can never give more than an illusory and fragmentary picture. GfK discovered that they had overestimated their knowledge of the region. Their experience highlights the pace of change and the meteoric swings that are commonplace, requiring extra vigilance from all observers. ■

Informational and technological environment

Elements of the informational and technological environment include information and communication systems, computerisation, use of electronic equipment, energy, production technology, science and invention. For example, in India, South Korea and many Latin American countries, advances in science and technology have not had a proportionate impact on the lifestyle of the majority of citizens. Computers and electronic information transfer have still to make an impact at grassroots level. Information handling and record keeping are performed in the traditional way. Again, this has an impact on the type of information that can be solicited from consumers, businesses and other enterprises.

Structural environment

Structural factors relate to transportation, communication, utilities and infrastructure. For example, telephone usage in the Far East, where many households do without telephones, is much lower than in Europe. Mail service is inefficient in many developing countries. Personal contact with respondents is difficult because city people work during the day and rural residents are inaccessible. Block statistics and maps are not available or can be obtained only with great difficulty. Many households and homes are unidentified.

Based on geography alone, national samples in China and Indonesia are almost unthinkable. China is predominantly rural and Indonesia consists of several thousand islands. In Thailand, only 21% of the population live in urban areas and two-thirds of the total urban population live in a single city, Bangkok. In these three countries, interviewing by telephone is, for the most part, not a consideration.[11]

Socio-cultural environment

Socio-cultural factors include values, literacy, language, religion, communication patterns, and family and social institutions. Relevant values and attitudes towards time, achievement, work, authority, wealth, scientific method, risk, innovation, change, and the Western world should be considered. The marketing research process should be modified so that it does not conflict with the cultural values. In many developing countries, 60% or more of the population is illiterate. In tradition-directed, less-developed societies, the ability of respondents to formulate opinions of their own seems to be all but absent; consequently, it is difficult to solicit information from these respondents. As a result, the sophisticated rating scales employed in Europe are not useful. There may also be several distinct spoken languages and dialects in a given nation or region.

In India, for example, there are 19 major languages and more than 200 dialects. India is divided into linguistic states. The country can be described as a mini-Europe, each state like a separate country within Europe, with its own language and cultural peculiarities. A survey which even approaches national representation in scope will generally be printed in at least 12 languages.[12]

A country with a homogeneous family structure is likely to be more culturally homogeneous than a country with multiple family structures. For example, Japan is culturally more homogeneous than many European or African countries, which have many different kinds of family structures.

Finally, what is meant by terms such as 'the youth market'? Many marketers believe that youth markets on a global basis are becoming more alike in their attitudes, lifestyles and aspirations. The following two examples urge caution in such assumptions, presenting small sketches of the forces shaping 'youth markets' in Asia and Europe.

example

'I want my MTV, but in Mandarin, please'[13]

Many magazines would have you believe that Asian teens, in appearance, attitude and posture, increasingly resemble American and European teens. However, this convergence view of global teen lifestyle overlooks the reality of Asian cultural diversity. The befuddling paradox is that, as Asian teens have become more globally aware, they have also grown increasingly confident in their local identity. This conflict between global and local is becoming more and more important, being reflected in food, music, language and brands. To appreciate this conflict, it is important to understand what 'Asianness' means to Asian teens. What makes Asianness a valid concept is its communities' resistance to deep cultural change, despite rapid technological and economic progress. Asia's open and purposeful resistance to change in general is rooted in fear of failure and its resultant loss of 'face'. In risk-averse Asia, the status quo is not such a bad place and any change is incremental. The salience of race, community and the family unit, downsizing notwithstanding, is unchallenged. The obvious signs of these include the enduring popularity of traditional costumes and aesthetics; the continued strength of extended families, family associations and networks; the continued power of religion; and a Confucian respect for elders. Even more interesting is how these values have over time been institutionalised into formal political or business practice. ■

example

Euro-youth: myth or reality?[14]

A major area of difference in European youth stems from the role of the family and attitudes to parenting. As expectations regarding living standards rise, and parental working hours extend to compensate, we are increasingly seeing a 'hands-off' style of parenting.

In Northern Europe we are increasingly seeing a 'hands-off' style of parenting.

Consequently, family related need-states become more difficult to satisfy, as parents are increasingly absent. This is especially true in Northern Europe, and nowhere more so than in Britain (which has the highest teen pregnancy and alcohol/drug abuse rates). Southern and certain eastern European Catholic countries tend to have more united family units, with extended support networks firmly in place. A distinct approach to personal space means that family members are likely to be resident close by and very much involved in young people's lives. Offspring remain living within the family home until much later (as late as 30 in Italy, for example) and parenting is much more 'hands-on'. This makes for a slower transition to emotional and financial independence. Tighter families provide an all-important sense of belonging to southern/eastern European teenagers. This is often denied to those from the north (with its more fragmented families), who are forced to make up for this deficit by turning to communal activities such as sports and clubbing to feel they are part of something. ■

Each country's environment is unique, so international marketing research must take into consideration the environmental characteristics of the countries or foreign markets involved. For companies that wish to expand into a large geographic region, this can cause problems. Should they invest in research into every country or even regions within countries, or will these be prohibitive in time and cost terms? If they cannot manage to research individual countries in a region, which countries should they focus upon? Questioning the resource issues of this dilemma, Martin Stollan, Associate Director of the research company IPSOS-Insight, offers the following argument.[15] 'Americans often tend to treat Europe as a single market, so that they feel that doing one country is enough, often choosing Britain because of the language, and that can be very misleading. An improvement is to choose one country in northern Europe and another in southern Europe. But ideally, you need to research each local market. Think of Britain and the differences between England, Wales and Scotland and you can understand the dangers of assuming that Portuguese consumers have the same attitudes as Spanish consumers (and by Spanish consumers do we mean Catalan and Basque as well as Castilian?).'

Researching from the security of a key market may miss subtleties that local researchers would be quick to pick up on. Another benefit of local researchers is that desk research and their knowledge can help to fill in many gaps. The ideal is to have a multi-country project, coordinated from one location with local suppliers carrying out individual country 'legs' within a common framework. The research approach should ensure quality control and consistency, and it should lead to actionable and global strategic recommendations, with all local markets represented. Such a maxim is fine, provided that international marketing researchers can demonstrate the potential returns from such an investment, which is inherently very difficult to achieve.

The extent to which companies may invest in research targeted at individual countries may be evaluated in terms of not only the potential returns and idiosyncrasies of that country, but also the complexities of implementing research techniques that will work well. To help understand the problems of implementing international marketing research, we provide additional details for implementing secondary data, qualitative techniques, survey methods, measurement and scaling techniques and questionnaire translation.[16]

Secondary data

Secondary data was covered in detail in Chapters 4 and 5. It is worth recalling where secondary data can support the research process, especially given some of the difficulties of conducting primary research in international markets. Secondary data can help to:

1 Diagnose the research problem
2 Develop an approach to the problem

3 Develop a sampling plan
4 Formulate an appropriate research design (for example, by identifying the key variables to measure or understand)
5 Answer certain research questions and test some hypotheses
6 Interpret primary data with more insight
7 Validate qualitative research findings.

Obtaining secondary data on international markets to gain support for the above is much simpler with the advent of the Internet. The Internet may allow access into international markets which in the past may have required travel to the country and a great amount of time-consuming searching. Judicious use of the Internet does not mean that the international researcher will automatically gain support in the above areas. There may still be little or no secondary data that relate to the issues we wish to research in an international market. For what data we can obtain, the principles of evaluating secondary data, as set out in Table 4.2, still apply. Conducting an evaluation of the nature, specifications, accuracy, currency and dependability may be far more difficult in international markets. The process and specifications of research conducted in international markets may not be explicit; one may need a deep understanding of conducting primary research in a country to understand why data have been collected in a particular manner. Language is also a major issue, not only in reading and interpreting data, but in the definitions used in measurements. Finally, secondary research from a target country may have been heavily influenced by political forces. The researcher may need to be aware of such influences in order to interpret and make use of the findings.

The following example illustrates the limitations of existing data in Russia, even though there are very competent researchers in the country. Overcoming this problem has helped to produce data that can be relied upon and is more relevant to a number of marketers.

example

Rise, rise, you Russian middle classes . . .[17]

All marketers need information to help understand their markets. One major problem is simply knowing who their consumers are. As one brand manager said: 'All my distribution is in Moscow and St Petersburg, but maybe only 30% of my final consumers are in these cities'. 1995 saw the introduction of the Target Group Index into Russia. Under licence from the British Market Research Bureau International, the Russian agency Comcon 2 has established the first single-source product and media survey covering all Russia. As in Britain, the objective is to gather information about the consumption and consumers of different goods and services, alongside their media preferences and attitudinal or lifestyle characteristics. Much previous research, while of high quality (the result of the high level of theoretical training of researchers within Russian universities), had been unsystematic and concentrated on the two major cities. ■

Another major development in the use of secondary data is in the development of geographic information systems. In the use of geodemographic classifications of consumers, systems already exist in Australia, Belgium, Britain, France, Germany, Hong Kong, Ireland, Italy, Japan, the Netherlands, New Zealand, Norway, South Africa, Spain, Sweden and the USA. The systems work well in defining consumers within each country and, as described in Chapter 5, can be used as a foundation to add transactional data generated within an organisation operating within each country. The international research problem emerges from the means of comparing classifications across the different countries. This problem emerges from the different data sources that are used to build the classifications in each country. There are different types of data that may be accessible, different standards and definitions used in data collection and different laws allowing the use, or not, of certain types of data.

Geodemographic databases can give an excellent introduction to a particular country and can form a foundation upon which other data sources can be built. At present, comparing consumer types across borders is problematic.

Qualitative techniques

Chapter 6 discussed the differences between European and US researchers in their approach to focus groups. In essence, a US approach is far more structured and tends to be a foundation for subsequent surveys, while the European approach tends to be more evolutionary and exploratory. The question of the perspective from which one plans and conducts qualitative research is not really important until other researchers or moderators from international markets become involved in the process. The approach adopted may not match the expectations of the decision-maker who will be supported by the research. These circumstances are outlined and illustrated in the following example.

example

When East meets West, quite what does 'qualitative' mean?[18]

International marketers have always been aware that qualitative research as it developed in the US and in Europe were quite different practices, stemming from different premises and yielding different results. American-style qualitative research started from the same evaluative premise as quantitative research but on a smaller scale. European-style qualitative research started from the opposite premise: it was developmental, exploratory and creative rather than evaluative.

The rest of the world tended to adopt one or the other style of qualitative research depending upon the history and trading partners of the country. For example, India adopted the European model, whereas Japan largely followed the American model. The difficulty for the Asia Pacific region is that the influences of both schools are found there concurrently. The founders of commercial research in the region came from the UK, Australia, New Zealand and America, bringing with them varying approaches. From a marketer's point of view, the problem is that both styles of qualitative research are currently on offer under the same description. Marketers may not be sure what they are getting; even worse, some research agencies seem unclear about what they are offering, serving up a confused mixture of both styles of qualitative research, falling short of achieving the objectives of either approach. ■

Decision-makers often require global answers to develop global marketing campaigns, yet data are often single-market related and cannot be easily interpreted across various countries. Researchers are wary of using varying methods across different countries and cultures and are especially wary of qualitative approaches. Using surveys, where far more control of the design and implementation can be afforded, many forms of bias can emerge when working across cultures. The problems of cross-cultural comparisons grow when qualitative techniques are used. Some researchers argue that international marketing researchers would be better off using direct observational approaches, rather than being misled by findings based upon the 'dubious' application of qualitative research techniques.[19]

Direct observational approaches are not feasible or even desirable for all international marketing researchers. Conducting qualitative research in a number of countries may mean approaching a local research company which is aware of local customs, language issues and administrative requirements. Nearly all international marketing researchers choose an in-country marketing research firm to complete the actual fieldwork, whether for focus group moderating or for interviews.[20] However, for some multi-country projects that are qualitative in nature, it may be impossible to find researchers with the cultural, linguistic and administrative experience that can allow some degree of consistency and means to compare findings. The following example illustrates how bilingual researchers working in teams tackle this problem.

example

In-depth research? A bit controversial[21]

Consumer markets such as soft drinks or processed foods are important enough to be regularly researched across many countries. Wherever you go there are professional qualitative researchers who really understand them. The same cannot be said for most business-to-business markets. Just sending a topic guide and recruitment questionnaire to local agencies is not enough.

Some research agencies have responded by recruiting bilingual researchers, so that the same research team that does the 'home' interviews can, with as much ease, do interviews in target foreign countries. They feel that this is the only way to guarantee consistency in how the research is carried out. More fundamentally, it is the only way to keep the approach flexible. Why is flexibility so important? True qualitative research entails wording questions to suit respondents: if necessary, to keep rewording the question until the answer makes sense. It means the freedom to adapt the interview to suit the interviewer's developing understanding of the subject. ■

This example also illustrates the essence of qualitative research in terms of exploring through rewording, of adapting an interview until sense is made. In international marketing research this calls for linguistic skills matching the native speaker in any target country. This may not be a solution that is feasible for all international research projects. Depending upon the array of countries to be researched, recruiting researchers with the relevant linguistic skills may not be possible, but it is the best alternative should local research companies not exist or be considered to be of poor quality. Good quality local researchers should be sought out, because, even if researchers with the relevant linguistic abilities are available, there are other cultural nuances that can affect the trust, rapport and comfort of qualitative research respondents. Often participants are unfamiliar with the process or simply do not trust the researcher. In many Asian cultures, respondents are unwilling to offer an individual opinion that may differ from that of the group. For instance, the need for politeness can thwart the researcher's desire to get at respondents' real feelings in a typical Japanese focus group.

In general, patience and sensitivity are required to overcome cultural problems in conducting qualitative research in international markets.[22] An excellent working relationship with a local research company can be absolutely vital to success and in many cultures can only be achieved by developing a personal relationship. Listening to the advice of local research companies will also enhance sensitivity to respondents. Patience is expressed by a preparedness to lengthen the research schedule, extra care in translation, pre-tests of wording and tact, and respect for respondents and local researchers. Great care should be taken to be more selective in recruiting and grouping respondents for focus groups.

Whether shaped by European or American paradigms, good qualitative research should be open and a learning process. This openness and learning should be shared among decision-makers, the researchers coordinating research activities and local researchers working in individual countries. All parties should clearly understand the premises for exploring particular issues, probing certain individuals and the bases for interpreting data. In qualitative international marketing research, where there may be confusion about the premises for the whole approach, there is a much greater need for openness between all parties involved.

Survey methods

The following sections discuss the major interviewing methods in light of the challenges of conducting research in foreign countries, especially Europe and developing countries.[23]

Telephone interviewing and CATI

In the USA and Canada, the telephone has achieved almost total penetration of households. In North America, telephone interviewing is the dominant mode of questionnaire administration. Throughout Europe there are also many countries, regions and cities that have almost total telephone penetration. Over recent years, telephone interviewing techniques in Europe have grown enormously. However, even with high penetration levels, many Europeans are reluctant to divulge personal details over the telephone. This means that the technique does not have the dominance seen in North America.

The successful use of the telephone in international research depends upon three factors. The first is the level of telephone penetration (see Chapter 10 for a discussion of the issues related to the selection of probability samples in telephone interviewing). The second is the completeness and accuracy of telephone directories (the growth of the use of mobile phones and of 'ex-directory' numbers has compounded this factor). The third is the cultural acceptance of using the telephone to divulge personal details.

In Hong Kong, for example, 96% of households (other than those on outlying islands and on boats) can be contacted by telephone. With some persistence, evening telephone interviewing can successfully achieve interviews with 70–75% of selected respondents. Residents are uninhibited about using telephones and relaxed about telephone interviews. Even in these circumstances, this is not the most important mode of data collection.[24]

In most developing countries, telephone penetration is low. There may be relatively high concentrations of telephone usage in particular cities and with particular types of consumer (especially in professional classes). Telephone interviews are most useful with respondents in these countries who are accustomed to business transactions by phone.

With the decline of costs for international telephone calls, multi-country studies can be conducted from a single location.[25] This greatly reduces the time and costs associated with the organisation and control of the research project in each country. Furthermore, international calls can obtain a high response rate, and the results have been found to be stable (i.e. the same results are obtained from the first 100 interviews as from the next 200 or 500). It is necessary to find interviewers fluent in the relevant languages, but in most major European cities this is not a problem.

In-home and in-office personal interviews

In many European countries, home interviewing is the dominant means to conduct surveys. Given that in-home interviews require a large pool of qualified interviewers and are time-consuming and costly, this may seem odd. However, when one considers the quality of rapport that can be built up between the interviewer and respondent, the amount of probing and the quality of audiovisual stimuli that can be used, there are clear benefits that outweigh the costs. In many areas of industrial marketing research, the only means to contact certain managers may be through the personal interview, held in their office.

In international research this means understanding the cultural implications of entering someone's home or office. In the example 'Warming responses from the Levant to the Gulf' on page 667 it was noted that local Arab females' mobility is generally restricted and all interviews have to be conducted at the recruiter's or respondent's home. This meant that the chances of finding women at home and obtaining an interview from them were much higher than in Europe.

In the GlobalCash study, where in-office interviews were conducted throughout Europe, two interviewers were used. The first (who had a high level of technical knowledge of cash management) attended all the interviews to ensure that a consistent approach was used, especially when probing. The second was from a business school in the country being surveyed. The second interviewer guided the means to obtain the interview in the first instance, i.e. to gain access. They then ensured that the protocol was correct (given the type of respondent faced) and finally helped with any language difficulties. The following example further illustrates a cultural problem faced with in-office interviews.

example

Russian roulette: exciting once you learn the new rules[26]

Executives find it odd, and sometimes sinister, that people should just come to ask questions which often seem irrelevant. One respondent, a high official in a major city, kept interrupting the interview with offers to sell the product under discussion and asked our agency to supply some other products. He considered it fatuous that he should face a stream of questions without seeing any concrete result at the end. It is usually assumed that the researcher belongs to the company commissioning the research, even when the relationship is made clear. Guarantees that the respondents' identity will remain confidential can be treated with disbelief. ■

Street interviews

In many countries, with low telephone penetration and comparatively low literacy rates, the street interview offers an excellent means to survey. This is illustrated in the following example, showing Chinese respondents enjoying the marketing research task.

example

Foreign policy[27]

Interviewing is not usually an obstacle in mainland China, says Taylor Nelson Audits of Great Britain Group Director for Greater China, Richard Necchi. The problem is ensuring that you have a representative sample to work from. Census data are simply not up to Western standards, he says, and researchers try to rely on government statistics as little as possible. The huge migrant population of about 100 million also means that the actual population of certain cities is much greater than official figures suggest, and this problem is likely to grow. 'In China we have to do face-to-face every time, as there are so few telephones. But people love answering questions.' Taylor Nelson compiles the TV ratings in China and has recently enlarged its sample to 12,200 households in 62 cities. ■

Provided that the environment of the street allows an interview to be conducted, the street interview is an excellent means to identify and interview individuals where there are poor or non-existent sampling frames. Given the congestion in many major international cities, the locations where interviews will be conducted have to be carefully selected. However, this does not differ from planning and conducting street interviews in 'home' markets. As with in-home and in-office interviews, the differences lie in the culture of approaching someone in the street and their willingness to divulge information to a stranger.

Mail interviews

Because of their low cost, mail interviews continue to be used in most developed countries where literacy is high and the postal system is well developed. Mail surveys are, typically, more effective in industrial international marketing research, although it is difficult to identify the appropriate respondent within each firm and to personalise the address. This point was illustrated in the GlobalCash study where 6,000 telephone calls were made throughout Europe to establish the identity of the target respondent and to check the postal details.

The growth of Internet usage has also meant a growth in the use of electronic mail surveys. Given the global nature of the Internet, for certain topics (such as home shopping using the Internet) this may be the cheapest and quickest means to conduct an international survey. However, given the sampling problems associated with Internet usage, great care must be taken in validating samples from such surveys. As the penetration of Internet usage increases globally, the technique has great potential for both survey work and qualitative techniques; it is ideally suited to reaching out across national boundaries.

The criteria for the selection of survey methods were discussed in Chapter 10. As discussed and illustrated in that chapter, an important consideration in selecting the methods of administering questionnaires is to ensure equivalence and comparability across countries. This is illustrated in the following example, where comparability between countries is of paramount importance. The example leads on to issues of equivalence in measurement and scaling.

example

Does luxury have a home country?[28]

In the late 1980s, RISC, an international consulting company, decided to launch a study on luxury goods. Consequently, they developed a number of questions about luxury brands which were added to the questionnaire administered to national representative samples of major European countries. In 1992 they decided to explore, in France, Germany and Italy, the particular issue of country images in relation to luxury. As a result, 2,500 respondents in each country answered the question '*In your opinion, which country best understands the idea of luxury and reflects it through its products and brands*?'

Respondents could choose from a list of seven countries: Britain, France, Germany, Italy, Japan, Spain and the USA. They were then asked to select from the same list the country they spontaneously associated with 10 general product-related dimensions.

The fact that the same survey was conducted at the same time with exactly the same research design in three countries was important because it allowed the magnitude of response biases due to '*patriotism*', a factor often presented as an explanatory variable for country-of-origin effects. ■

Measurement and scaling

In international marketing research, it is critical to establish the equivalence of scales and measures used to obtain data from different countries.[29] As illustrated in Figure 26.2, this requires an examination of construct equivalence, operational equivalence, scalar equivalence and linguistic equivalence.[30]

Construct equivalence
A type of equivalence that deals with the question of whether the marketing constructs have the same meaning and significance in different countries.

Construct equivalence deals with the question of whether the marketing constructs (for example opinion leadership, variety seeking and brand loyalty) have the same meaning and significance in different countries. In many countries, the number of brands available in a given product category is limited. In some countries, the dominant brands have become generic labels symbolising the entire product category. Consequently, a different perspective on brand loyalty may have to be adopted in these countries.

Conceptual equivalence
A construct equivalence issue that deals with whether the interpretation of brands, products, consumer behaviour and the marketing effort are the same in different countries.

Construct equivalence comprises conceptual equivalence, functional equivalence and category equivalence. **Conceptual equivalence** deals with the interpretation of brands, products, consumer behaviour and marketing effort. For example, sales pro-

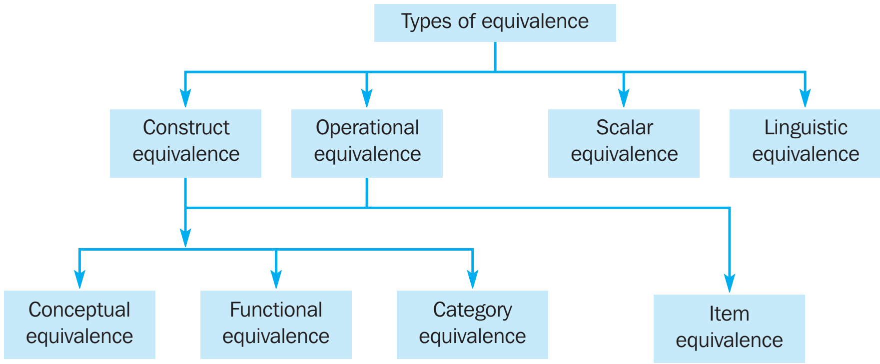

Figure 26.2 Scaling and measurement equivalence in international research

motion techniques are an integral component of marketing effort throughout Europe. On the other hand, in countries with shortage economies, where the market is dominated by the sellers, consumers view sales with suspicion because they believe that the product being promoted is of poor quality. **Functional equivalence** examines whether a given concept or behaviour serves the same role or function in different countries. For example, in many developing countries, bicycles are predominantly a means of transportation rather than of recreation. Marketing research related to the use of bicycles in these countries must examine different motives, attitudes, behaviours, and even different competing products from such research would in Europe. **Category equivalence** refers to the category in which stimuli such as products, brands and behaviours are grouped. In Europe, the category of the principal shopper may be defined as either the male or female head of household. This category may be inappropriate in countries where routine daily shopping is done by a domestic servant. Furthermore, the category 'household' itself varies across countries.

Functional equivalence
A construct equivalence issue that deals specifically with whether a given concept or behaviour serves the same role or function in different countries.

Category equivalence
A construct equivalence issue that deals specifically with whether the categories in which brands, products and behaviour are grouped are the same in different countries.

Operational equivalence concerns how theoretical constructs are operationalised to make measurements. In Europe, leisure may be operationalised as playing golf, tennis or other sports, watching television, or basking in the sun for example. This operationalisation may not be relevant in countries where people do not play these sports or do not have round-the-clock TV transmission. Lying in the sun is generally not normal behaviour in countries with hot climates. **Item equivalence**, which is closely connected to operational equivalence, presupposes both construct and operational equivalence. To establish item equivalence, the construct should be measured by the same instrument in different countries.

Operational equivalence
A type of equivalence that measures how theoretical constructs are operationalised in different countries to measure marketing variables.

Item equivalence
Use of the same instrument in different countries.

Scalar equivalence, also called metric equivalence, is established if the other types of equivalence have been attained. This involves demonstrating that two individuals from different countries with the same value on some variable, such as brand loyalty, will score at the same level on the same test. Scalar equivalence has two aspects. The specific scale or scoring procedure used to establish the measure should be equivalent. The equivalence of response to a given measure in different countries should be considered. For example, do scores from the top box or from the top two boxes on a purchase-intent scale reflect similar likelihood of purchase in different countries? Finally, **linguistic equivalence** refers to both the spoken and the written language forms used in scales, questionnaires and interviewing. The scales and other verbal stimuli should be translated so that they are readily understood by respondents in different countries and have equivalent meaning.[31]

Scalar equivalence
The demonstration that two individuals from different countries with the same value on some variable will score at the same level on the same test. Also called metric equivalence.

Linguistic equivalence
The equivalence of both spoken and written language forms used in scales and questionnaires.

Questionnaire translation

example
GlobalCash Project

Translation into 10 languages[32]

Robert Kirby, who was the Telephone Research Director at Research Services Ltd and has many years' experience of pan-European telephone surveys, offers the following advice in coping with translation:

> *Translations require the most rigorous checking. In my experience it is not advisable to use someone from a home country who can speak the language fluently, because frequently a current idiomatic knowledge is required. A translation agency with no expertise could have the idiom but not the interviewing skills.*

His advice was valuable in the GlobalCash Project. The GlobalCash questionnaire was translated from English into Czech, Finnish, French, German, Greek, Hungarian, Italian, Polish, Portuguese and Spanish. In the project there was the added dimension of confusing technical terms with terms such as 'netting', 'pooling' and 'concentration', which have a day-to-day usage that is entirely different from the financial usage. The translation for the GlobalCash Project was undertaken by the business schools in the target countries that understood the idiom, the elicitation task required of finance directors in their country and the technical terms used. ■

example

Taking the people's temperature – right across Europe[33]

The continuous tracking survey of EU citizens' opinion of European issues uses 19 variants of their questionnaire, to include people living in countries where more than one national language is common. All the questionnaires have to go through extensive checking, translation, back translation, harmonisation and piloting in the short time between finally agreeing the questionnaire and starting work. ■

Back translation
A translation technique that translates a questionnaire from the base language by a translator whose native language is the one into which the questionnaire is being translated. This version is then retranslated back into the original language by someone whose native language is the base language. Translation errors can then be identified.

Parallel translation
A translation method in which a committee of translators, each of whom is fluent in at least two languages, discusses alternative versions of a questionnaire and makes modifications until consensus is reached.

As in the above examples, questions may have to be translated for administration in different cultures. Direct translation, in which a bilingual translator translates the questionnaire directly from a base language to the respondent's language, is frequently used. If the translator is not fluent in both languages and is not familiar with both cultures, however, direct translation of certain words and phrases may be erroneous. Procedures like back translation and parallel translation have been suggested to avoid these errors. In **back translation**, the questionnaire is translated from the base language by a bilingual speaker whose native language is the language into which the questionnaire is being translated. This version is then retranslated back into the original language by a bilingual whose native language is the initial or base language. Translation errors can then be identified. Several repeat translations and back translations may be necessary to develop equivalent questionnaires, and this process can be cumbersome and time-consuming.[34]

An alternative procedure is **parallel translation**. A committee of translators, each of whom is fluent in at least two of the languages in which the questionnaire will be administered, discusses alternative versions of the questionnaire and makes modifications until consensus is reached. In countries where several languages are spoken, the questionnaire should be translated into the language of each respondent subgroup. It is important that any non-verbal stimuli (pictures and advertisements) also be translated using similar procedures. The following example underscores the importance of translation that does not impose the structure of a 'home country' from which the research is commissioned, in this case Britain.

example

The search for focus – brand values across Europe[35]

Land Rover wished to understand the values associated with their brand in Belgium, Britain, France, Germany, Italy, the Netherlands, Portugal and Spain. The project involved the use of CAPI and required the development of a questionnaire that could allow comparisons between the countries. The issue of questionnaire translation was a sensitive and pertinent one. What was crucial was that the translation was meaningful in all languages rather than forcing the English language requirements into the local language. The translation was a difficult process and required an understanding of both the research process and the cultural context of the individual markets. It was the case that certain concepts that are expressive in English could not easily be translated into other languages. For instance, the word 'aspirational' does not easily translate into French, Spanish or Italian with the same meaning as in English. Consequently, in order to ensure comparability the translation process involved a series of iterative steps changing the master questionnaire to fit what was achievable overall in each market. ■

Ethics in marketing research

Ethical responsibilities for marketing research conducted abroad are very similar to those for research conducted domestically. In conducting marketing research across Europe (and indeed globally), ESOMAR produce a code of conduct that guides professional practice that protects the interests of all research stakeholders. In general, for each of the six stages of the marketing research design process, the same four stakeholders (client, researcher, respondent and public) should act honourably and respect their responsibilities to one another. For individual countries, a key development in honourable practice lies in the development of professional associations. These can guide researchers through the development of specific codes of practice that may reflect their culture and industrial heritage. For example, in the Czech Republic, Hungary, Poland and Russia, major market research suppliers are forming associations and introducing or discussing quality standard systems for fieldwork. Research was not unknown in the region prior to the collapse of communism and most countries have had a tradition of government-sponsored research spanning 40–50 years. Most major suppliers are investing in their future by training their staff in Western Europe and North America.[36]

For all the similarities that may exist in conducting research in international markets, some ethical issues become more difficult to solve. Consider the dilemma presented by David Mendoza, Director of Gobi International, an Anglo-Russian industrial research company: 'Some people will, Soviet style, still refuse to answer any questions of any kind. Others, often the same type of former Soviet apparatchik, but totally disillusioned, will promise to tell you whatever you need in return for dollars. Frankly, this is highly unsatisfactory and something we try to avoid, although often there is no choice'.[37]

Internet and computer applications

The Internet and computers can be extensively used in all phases of the international marketing research process. These uses parallel those discussed in earlier chapters and hence will not be repeated here. The fact that the Internet can be used to communicate with respondents and marketing decision-makers anywhere in the world has given a new dimension to international marketing research. For example, the online survey overcomes geographic boundaries and differences in postal systems to solicit responses from around the world. The online survey also takes advantage of one interviewer (the computer) that can present the same survey in several different translations.

The environmental characteristics of international markets detailed in this chapter present a formidable research task, especially when first learning about a country. The Internet is the ideal means to quickly access material that helps to shape an understanding of the environmental context of a particular country. This is particularly relevant in tracking down secondary data sources that may not be available in the home country of a researcher.

The Internet has also been extremely beneficial in conducting qualitative interviews. One of the most difficult administrative tasks in conducting focus groups is getting participants together at an agreed location. Because of the travel problems for certain respondents, many focus groups may have to be conducted to cover a wide geographic area. The Internet can help to overcome these problems, first of all by the convenience it offers the participants – not having to leave their homes – and second by the breaking down of geographic boundaries.

Summary

With the globalisation of markets, international marketing research is burgeoning rapidly. As well as the technical requirements of conducting successful marketing research as outlined in this text, the researcher has to cope with new cultures and languages in targeted international markets. Given the array of ethnic groups within most European countries, the challenges of understanding new cultures and languages can exist within a 'home' country.

The environment prevailing in the international markets being researched influences all six steps of the marketing research process. Important aspects of this environment include the marketing, government, legal, economic, structural, informational and technological, and socio-cultural environment.

In collecting data from different countries, it is desirable to use techniques with equivalent levels of reliability rather than the same method. Repeating identical techniques across borders may result in subtle cultural and linguistic differences being ignored, which may have a great effect upon the nature and quality of data that are generated. It is critical to establish the equivalence of scales and measures in terms of construct equivalence, operational equivalence, scalar equivalence, and linguistic equivalence. Questionnaires used should be adapted to the specific cultural environment and should not be biased in favour of any one culture or language. Back translation and parallel translation are helpful in detecting translation errors.

The ethical concerns facing international marketing researchers are similar in many ways to the issues confronting domestic researchers. Working in countries where professional marketing research associations exist should allow access to codes of conduct that reflect the culture and industrial heritage of that country. However, the international researcher being exposed to an array of cultures and economic scenarios should always expect to find new situations and ethical dilemmas.

Questions

1. Evaluate the meaning of 'international' from the perspective of the marketing researcher.
2. What characteristics distinguish international marketing research from domestic marketing research?
3. Describe the aspects of the environment of each country that should be taken into account in international marketing research.
4. Describe the importance of considering the marketing environment in conducting international marketing research.
5. What is meant by the structural environment? How do the variables comprising the structural environment influence international marketing research?
6. What is meant by the informational and technological environment? How do the variables comprising the informational and technological environment influence international marketing research?
7. What is meant by the socio-cultural environment? How do the variables comprising the socio-cultural environment influence international marketing research?
8. How should the researcher evaluate secondary data obtained from foreign countries?
9. Describe the factors that may influence the approach to qualitative techniques in different countries.
10. Select a country, using environmental characteristics to illustrate why CATI works particularly well as a survey technique.
11. Select a country, using environmental characteristics to illustrate why in-home interviewing does not work particularly well as a survey technique.
12. Select a country, using environmental characteristics to illustrate why Internet surveys work particularly well as a survey technique.
13. How should the equivalence of scales and measures be established when the data are to be obtained from different countries or cultural units?
14. What problems are involved in the direct translation of a questionnaire into another language?
15. Briefly describe the procedures that may be adopted to ensure translation is correctly conducted in the development of a questionnaire.

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