Chapter 30

INTERNATIONAL MARKETING RESEARCH

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Introduction

A company advertised eyeglasses in Thailand by featuring a variety of cute animals wearing glasses. The advertisement was a poor choice since animals are considered to be a form of low life and no self respecting Thai would wear anything worn by animals (Payne, website). Could the company have known about this before the product launch in Thailand? Why did the company fail in spite of coming up with a trendy and fashionable product?

The reason for the company's failure in Thailand was that they did not identify themselves, advertising in this case, with the Thai culture and totally misjudged the social customs of Thailand. The company could have been more knowledgeable about this had their information from international marketing research been accurate. This is not an isolated case, but stems from one of the many idiosyncrasies that exist in the markets around the world. Some of the idiosyncrasies for select regions are listed in Table 30.1.

Table 30.1 about here

In this chapter, we first define international marketing research and find out about the major players in the industry. Then, we move on to see how international market research is done, the various methods of data collection, the biases and scales involved in data collection and know how data is interpreted from one country to another.

What Is International Marketing Research?

International Marketing Research (IMR) can be defined as *market research conducted either simultaneously or sequentially to facilitate marketing decisions in more than one country* (Kumar, 2000).

The process calls for studying the various market characteristics for facilitating marketing decisions that can be taken across countries. The studies deal with tracing the various components that are responsible for the marketing the product.

So How Is It different from Domestic Marketing?

The process of international marketing research though involves the same disciplines as domestic research, has some differences compared to its domestic version. The major differences are

- The national differences between countries arising out of political, legal, economic, social and cultural differences and,
- The comparability of research results due to these differences.

National Differences

The main factors that affect the way in which people from different cultures behave are:

a. ***Cultural Differences***: Culture refers to widely shared norms or patterns of behavior of a large group of people. It is defined as the values, attitudes, beliefs, artifacts and other meaningful symbols represented in the pattern of life adopted by people that help them interpret, evaluate and communicate as members of society. The need for greater cross cultural awareness is heightened in our global economies. Cross cultural differences in matters such as language, etiquette, non-verbal communication, norms and values can lead to cross cultural blunders as illustrated by the following marketing mix:

Product: A soft drink was introduced into Arab countries with an attractive label that had six-pointed stars on it. The Arabs interpreted this as pro-Israeli and refused to buy it. Another label was printed in ten languages, one of which was in Hebrew- again the Arabs did not buy it (Payne, website).

Price: An American firm was trying to get an acceptable price for their product from a Japanese buyer. The Americans presented a very detailed presentation and offered what they felt was a reasonable price. After a few moments of silence, the Americans thought the Japanese were going to reject the offer so they lowered the price. There was more silence by the Japanese. The Americans then said they would lower their price one last time and that this was the lowest they could go. The Japanese accepted this offer after a brief silence. The Japanese later said the first price was within an acceptable range, but it was their custom to consider the proposal *silently* before giving their decision. The Americans lost a lot of profit by jumping the gun and believing that Japanese respond just like the Americans do (International Business Communication, http://www.cba.uni.edu/buscomm/InternationalBusComm/blunders.htm).

Place: A well known drinks company tried to introduce a two liter drinks bottle into Spain, but found it hard to enter the market - they soon discovered this was because few Spaniards had fridge doors large enough to accommodate the large size bottle (Payne, website).

Promotion: When Pepsico advertised Pepsi in Taiwan with the ad “Come Alive With Pepsi” they had no idea that it would be translated into Chinese as “Pepsi brings your ancestors back from the dead.”

b. ***Racial Differences***: This would refer to the differences in physical features of people in different countries. For example, the types of hair care and cosmetic products needed in U.S would differ from those needed in South East Asia.

c. ***Climatic Differences***: This would include the meteorological conditions like degree of rain and temperature range in the targeted foreign market. For instance, Bosch-Siemens had to alter their washing machines with a minimum spin cycle of 1,000 rpm and a maximum of 1,600 rpm in Scandinavia, owing to irregular sunshine. In Italy and Spain, on the other hand, it is sufficient to have a spin cycle of 500 rpm as there is abundant sunshine (Stevens & Davis, 1997).

d. ***Economic Differences***: The level of economic development in a market can affect the desired properties of a product and in this way can inspire a company to adapt its products in order to meet the needs of the local market. The level of economic progress in a market can be assessed by a series of indications:

The level of revenue and buying power of local consumers: This will have an influence on the technical conception and marketing of exported products. In richer countries where the state of economic progress is more advanced, consumers generally having a higher purchasing power and tend to prefer purchase of more sophisticated products with advanced functions, while people in poorer markets would be interested in a simplified version of the product.

The state of infrastructure in the market: The general level of the quality of infrastructure in the country consisting of elements such as transport, energy communication systems, etc. can affect how the product is constituted as it can bring about different conditions of use. For instance when car manufacturer Suzuki entered India, it had to reinforce the suspension or the "road clearance level" of the cars as the state of the roads were poor.

e. ***Religious Differences***: Religion has many impacts on products, more particularly on the ingredients, that constitute them. For example, in Islamic countries, companies, exporting grocery products based on beef have to furnish a certificate declaring that the animals have been slaughtered respecting "Halal" methods. Alcoholic drinks are equally banned in Middle Eastern countries. Religious restrictions can therefore require product adaptation.

f. ***Historical Differences***: Historical differences help explain facts such as the playing of cricket in England, as opposed to game of boules in France. These differences have slowly evolved over time but have a profound effect on consumer behavior. For example, drinking Scotch whiskey is considered prestigious and trendy in Italy, but old-fashioned and almost boring in Scotland.

g. ***Language Differences***: Language is an important aspect of international marketing research. Inappropriate use of language could result in loss of market apart from turning out to be a cross cultural gaffe. For instance, U.S. and British negotiators found themselves at a standstill when the American company proposed that they "table" particular key points. In the U.S. "Tabling a motion" means to not discuss it, while the same phrase in Great Britain means to “bring it to the table for discussion.” (Ricks, 1999).

h. ***Differences in Actual and Potential Target Groups***: In countries like England and Germany it is possible to do national samples. Small towns and villages can be included because distances are not great. In Spain, interviews can be conducted only in cities with populations of over 100,000 people, as the cost of interviewing people in small towns and villages is prohibitively high (Kumar, 2000).

In addition, the international marketing researcher may also have to deal with other factors such as differences in the way that products or services are used, differences in the criteria for assessing products or services across various markets and differences in market research facilities and capabilities.

Comparability of Tasks

The concept of comparability refers to the problem faced by a researcher in comparing the results and interpreting the implications when dealing with two or more countries, is referred to as the comparability of tasks. This is absolutely essential to any research that has been set up to provide as basis for an international marketing decision.

As firms push the geographic frontiers of their operations to take advantage of growing opportunities, they need to collect information from a broader and more diverse range of markets. Increasingly, this entails conducting research in unfamiliar and distant markets in the Far East, the Middle East, Latin America and Africa. This in turn poses a number of challenges, not only in collecting accurate and reliable information on behavior patterns in an expeditious and cost-effective fashion, but also in predicting response to new and unfamiliar stimuli, and interpreting the implications thereof for marketing strategy.

About the IMR Industry

For many years, estimates have been provided of the size of national research markets. These estimates have been based on data collected by national market research trade associations and national research societies, along with the work of a few individuals and earlier ESOMAR studies. It has been estimated that in terms of research expenditure, the top three countries are the United States, the United Kingdom and Germany (Kobayashi & Draper, 1990). Research in Europe is primarily conducted in Germany, the United Kingdom, France, Italy and Spain (Demby, 1990).

The top 25 global research organizations earned $11.6 billion in revenue in 2003, up by 1.4 percent over 2002 (Table 30.2). Of the top 25 global firms, 12 are based in the United States and 67.3 percent of the revenue came from international operations Honomichl, 2004). The worldwide marketing and opinion research industry now accounts for about $17 billion of revenue and employs more than 650,000 people. About 1000 top clients' countries are accountable for about 80% of the global turnover; 65% of their MR budgets goes to 25 research providers. Ten countries account for over 80 % of the global turnover (ESOMAR, http://www.esomar.org/esomar).

Table 30.2 about here

Internationalization of Business Operations

More companies are taking to operations on a global or regional scale than a national scale. The complexity and sophistication of the operations changes as the company steps into international markets. The guidelines to these issues can be found in the EPRG framework (Wind, Douglas, & Perlmutter, 1973). This framework identifies four types of orientations towards internationalization as the company expands into international markets. They are:

a. Ethnocentrism – orientation towards home country
b. Polycentrism – orientation towards host country
c. Regiocentrism – regional orientation and,
d. Geocentrism – world orientation

These attitudes reflect the goals and philosophies of the company and help in developing management strategies and planning procedures with regard to its international operations.

In the ethnocentric stage, the top management views domestic techniques and personnel as superior to foreign and as the most effective in overseas markets. The company sees its domestic business as its priority and views foreign sales as a profitable extension of its domestic sales. A company with this domestic market extension concept typically identifies markets where demand is similar to the home market and where its domestic product will be acceptable. Meter-Man Inc. could be said to follow this orientation.

A polycentric attitude emerges once the company begins to recognize the importance of the inherent differences in offshore markets. A company guided by this concept is of the view that country markets are vastly different and that, market requires an almost independent program for each country. The company also believes in using local personnel and techniques to suit the local market conditions. The company with such a multi-domestic market concept adapts its products without coordination with other country markets; its advertising campaigns, pricing and distribution decisions being localized. Fedder, according to its plans, fits this orientation.

In the regiocentric and geocentric stages, the company recognizes the regional commonalities and undertakes regional strategies by considering the region or the entire world as a potential market, ignoring national boundaries. The firm develops policies and organizes activities on a regional or worldwide basis. Firms using this global marketing concept design product lines, pricing decisions, promotions and the channels of distribution for regional or worldwide markets. Coca-Cola, Ford Motor Company, General Motors and several other companies follow this orientation and can be described as global companies.

Who Do We Need: Specialists or Generalists?

A company can be a global company if it achieves efficiencies of scale by developing a standardized product of dependable quality, and sells it in the global market at a reasonable price throughout the world. The global marketing concept is about viewing an entire set of country markets as one unit, identifying groups of prospective buyers and developing a marketing plan through cost standardization.

When evaluating foreign markets, several other factors need to be considered for standardizing the products across markets. These factors can be grouped into foreign uncontrollables which includes economics forces, cultural issues, political/legal forces and level of technology among others. So, while the marketing plan can be standardized, a researcher will have to take into consideration the uncontrollable factors that will have an effect on business in the respective foreign market. This process of considering the uncontrollable factors particular to a market into the overall marketing plan is known as the specialist approach in international marketing research.

While the generalists consider the world markets as a whole, specialists take in all the country and region specific factors that would govern the marketability of the product in those markets. The effect of uncontrollables on a product can be seen in the case of Nike. The logo on a new line of shoes represented flames or heat rising off a blacktop. Unfortunately, the logo inadvertently resembled the Arabic script for the word “Allah”, the Arabic word for God. After receiving complaints from Muslim leaders regarding the use of this word on the shoes, Nike recalled the offending shoes (Associated Press, 1997). This case shows how easy it is to offend when the uncontrollables are not properly accounted for, as in the case of religion as explained here.

Hence global research calls for specialists and not generalists, since it is important to address the country specific issues in the marketing process while researching new markets.

Centralized vs. Decentralized Research

Centralized research is done when the researcher conducts research in two or more countries from the headquarters. Centralization of the project can add to the complexity of problems with hierarchy and authority since such a study can involve staff at the headquarters, staff at foreign offices of the company, foreign survey conductors and possibly an overall survey coordinator. This can result in dispute, delay and inefficiency.

Decentralized research is done when the researcher has the company office in each country conduct the research based on the guidelines from the headquarters. In a decentralized research, the researcher in the foreign country should be able to conduct research in the language specified by the headquarters or should be able to translate the information gathered correctly into the language at the headquarters.

Consider the example of Parker Pens. They had a decentralized marketing department with ad agencies in more than 40 countries developing ads for them. A new team of executives were hired and all their marketing decisions were centralized in the company's headquarters in Janesville, Wisconsin. They wanted to standardize the promotion, packaging, pricing, promotional materials, and advertising. They believed the difference in the cultures were less important than the similarities. They wanted to use one ad agency to develop one ad to be used around the world. Subsidiaries complained that the pens may be similar, but the markets were not. When the same ad was used in all countries, the ads tried to say something to everyone but ended up saying nothing to anyone. The company's campaign floundered following which the CEO was forced to resign and the rest of the team either quit or were fired. The company then returned to a decentralized marketing system (International Business Communications, http://www.cba.uni.edu/buscomm/InternationalBusComm/blunders.htm).

Thus, from the above example it is clear that due to a centralized research approach, Parker Pens ended up with a centralized marketing strategy overlooking cross-cultural values and norms. This marketing research blunder could have been avoided had there been a decentralized research which would have recognized the various country specific issues that determined the way of functioning of each market.

How Is Research Done Across Countries?

International Marketing Research includes a range from Single country research to the more elaborate Multi-country research. A brief description of each mode is discussed below.

Single-country Research

This type of research is done when there arises a need for organizations to conduct research in a single foreign country market. Typically, this need arises when a researcher based in country A wants to know whether the marketing strategies that work well in its domestic environment can be translated to a country market B. The single-country research is useful in bringing out the unique characteristics of the foreign market that would require adapting the product to serve the needs of the local consumers better.

Multi-country Research

Multi-country research, as the name indicates, involves research conducted in more than one country market. Multi-country research can be further classified into three broad categories:

a. Independent Multi-country Research: This is perhaps, the most common form of international marketing research that can be seen in the industry today. Independent multi-country research studies occur when subsidiaries of the companies independently conduct research on the same products in a number of countries. Examples of this type of research are brand awareness/perception of international products or test marketing of new products. The major disadvantages of this type of research are that it often leads to duplication of effort (such as questionnaires, etc.)

and since such studies are conducted in isolation, comparisons of results across countries are made difficult.

b. Sequential Multi-country Research: Sequential Multi-country Research is a way to research a range of geographical markets. It is attractive as the lessons can be learned in the first one or two markets to be researched and then can be applied to the other countries subsequently involved in the research program. The sequential approach is typically used when a product or service is the subject of rolling launch across countries.

c. Simultaneous Multi-country Research: This type of research involves conducting marketing research in multiple country markets simultaneously, and is, perhaps, the ‘purest’ form of international marketing research. It is a test for the researcher capabilities and also creates in its most acute form, the question of comparability.

What Is Cross Cultural Response Bias?

Cross-cultural researchers conducting studies across different cultural groups need to consider whether the scores obtained are comparable. In order to achieve meaningful cross-cultural comparisons, the issues of equivalence and response bias has to be addressed. Response bias is the systematic tendency to distort responses to rating scales so that observed scores are unrelated to the true score of the individual by either selecting extreme or modest answers (extreme or modesty response bias) or a shifting of responses to either end of the scale (acquiescence response bias) (Byrne & Campbell, 1999; Cheung & Rensvold, 2000). The cultural tendencies belonging to different cultural groups, are likely to change the responses of participants and make them incomparable across cultural groups and therefore resulting in a bias (Fischer, 2004). Hofstede (1980) was among the first to advocate the use of standardization as an adjustment of raw scores in cross-cultural research to correct for such response tendencies.

Techniques such as Structural Equation Modeling (Cheung & Rensvold, 2000; Little, 1997, 2000) and Item Response Theory (Butcher, Lim, & Nezami, 1998; Huang, Church, & Katigbak, 1997) can be used to identify whether different response strategies were used by participants in different samples. Researchers can then decide whether they want to standardize their data or not. There are four major groups of standardization procedures. These four groups are (a) adjustment of means, (b) adjustment for dispersion (e.g., using standard deviation), (c) adjustments using means and dispersions, and (d) covariate analysis. These groups can be classified into within-subject, within-group, and within-culture categories, based on the statistical information they use for standardization.

The within-subject standardization procedure refers to the adjustments of scores for each individual using the mean for that individual across all variables (Hofstede, 1980). The average of a subset or all variables for that particular individual is subtracted from each individual's raw score. Hence, the resulting score is the relative position of the individual on a variable in relation to the other scores. The mean across variables for this individual will average to zero. This procedure is also called Ipsatization (Hicks, 1970).

The within-subject standardization procedure has several variants. The most common form is the computation of *z* scores whereby the group mean is subtracted from the variable raw score and then divided by the standard deviation (Howell, 1997). Hence, the resulting score is the relative position of one specific individual on one variable relative to the position of other individuals in that group. The mean across individuals is zero and, assuming a normal distribution of responses, the resulting standard deviation will be 1. An adjustment procedure, commonly referred to as Centering (Aiken &West, 1991) is also available wherein, only the mean across individuals is used.

In the within-culture standardization (Bond, 1988; Leung & Bond, 1989), instead of using the group mean across one item (as done in *z* transformation), the mean across all items and all individuals (the grand mean) is used. It is possible to adjust this deviation score by dividing it by the standard deviation across items and individuals.

A combination of within-subject and within-culture, called Double Standardization can also be used (Leung & Bond, 1989). Initially, the scores are adjusted within the individual (within-subject standardization), and then the resulting scores are adjusted within the group (within-culture standardization). Thus, the means for each individual across variables and the mean for each variable across individuals will be zero. Assuming normality of the raw data, the adjustment using the standard deviation should yield standard deviations of 1 for both individuals across variables and variables across individuals.

It is important to note that these standard procedures can be done both at item level and at construct level. One may standardize individual items using the relevant mean across either items or individuals or one may standardize the mean for one specific construct using the relevant mean across either items, constructs, or individuals.

Idiosyncrasies of Collecting Data in International Settings?

In this section, we highlight the idiosyncrasies of countries and regions as far as data collection is concerned. We do not provide a description of the techniques as they are available in Chapters 4 and 5 of this handbook.

Personal Interviews tend to be the dominant mode of data collection outside the United States and Canada (Monk, 1987). Lower wage costs imply that personal procedures are cheaper than in the United States. In Latin countries, and particularly in the Middle East, interviewers are regarded with considerable suspicion. In Latin countries, where tax evasion is more prevalent, interviewers are often suspected of being tax inspectors. In the Middle East, where interviewers are invariably male, interviews with housewives often have to be conducted in the evenings when husbands are at home.

Mall Intercept Surveys are very popular in the United States and Canada, though not commonly used either in the European countries or in developing countries.

Telephone Interviews are not as advantageous in international marketing research as low levels of telephone ownership and poor communications in certain countries limit the coverage provided by telephone surveys. In countries such as India, which is predominantly rural, the telephone penetration is only 1 percent, and hence telephone surveys may not be the ideal method to adopt Sopariwala, 1987). Even in relatively affluent societies such as Great Britain, telephone penetration is only 80 percent, and telephone interviewing is not widely used because many practitioners are still skeptical about it. In Britain and France, there are substantial declines in telephone response rates in large cities. The Eastern European countries and countries in the newly formed Commonwealth of Independent States have a poor telecommunication system. In such countries, conducting telephone surveys may not be a good idea.

However, with the decline of international telephone costs, multi-country studies can be conducted from a single location. This significantly reduces the time and costs associated with negotiating and organizing a research project in each country, establishing quality controls, and so on. Although the additional costs of making international telephone calls are incurred, these may not be highly significant when a centralized location is used. International calls also obtain a higher response rate. Results obtained using this technique has been found to be highly stable. Interviewer and client control is considerably greater.

Mail Surveys in international settings can have limitations because of the absence of mailing lists, poor mail services, and high levels of illiteracy. For example, mail surveys are ineffective in countries such as Brazil, where it has been reckoned that 30 percent of the domestic mail is never delivered; or Nicaragua, where all the mail has to be delivered to the post office. Even in countries where literacy levels and mail services make the use of mail surveys feasible, a tendency to regard surveys as an invasion of privacy may limit their effectiveness. Thus, while mail surveys may be used effectively in industrial marketing research, in consumer research they may be appropriate only in industrialized countries where levels of literacy are high and mailing lists are generally available.

Focus Groups in the international setting, can be effective as long as it is realized that it is important for the moderators to be conversant with the language and also the patterns of social interaction and the nonverbal cues used by people in that part of the world. Here are some points to take note of:

- Women in the Middle East do not have as much freedom as women in the Western world.
- In some Asian countries, the moderator must take special interest in introductions if the discussion is to be truly open and candid.
- The French have been proven to resist innovations of any kind.
- The Japanese hesitate to criticize new product ideas.
- There is a very strong group mentality in Asian culture while most Americans tend to be individualistic (Greenbaum, 1996).
- *Timeframe*: Many companies in the United States and Canada are used to completing the research project in a relatively short period of time. This is not possible with international research. Lead times tend to be much longer, more so in the Far East. A good estimate would be to calculate the time required for the research in the United States and double it for Europe. It would be longer for Asia.
- *Structure*: In most of other countries, focus group panels consist of four to six people, versus eight to ten in the United States. The focus group interviews themselves last for almost four hours.
- *Recruiting and Re-screening*: Panelists for focus groups in the United States are screened and recruited in a rigid manner. These processes must be monitored very carefully in foreign countries.
- *Approach*: Foreign moderators are not as structured and as authoritative as U.S moderators. This can result in long periods of silence and digression.

> This is because foreign moderators feel it necessary to allow the group to settle down and establish trust to build up the necessary comfort. Foreign focus groups tend to use fewer external stimuli, such as photos and visual aids.

Is English the Universal Language for Asking Questions?

Language is the basic tool of communication processes and it tends to be an integral part of the culture it emanates from. Thus languages reflect their cultures of origin in the words and varieties of words used for particular objects. This is why Bedouins have an ample vocabulary for types of sand and Mexicans for types of hot peppers. Language will be one of most important challenges among other issues like market research, distribution channels and dealing with legal and banking issues, when entering into international markets. In all these challenges, it is essential not to make translation an afterthought – the consequences could be disastrous.

In a recent study conducted in 2000, it has been found that about 70% of all US Hispanics preferred to conduct a market research interview in Spanish. Further, when asked about language of preference for communication when given a choice, 58% indicated they preferred Spanish, 27% said English, and 14% indicated not having a preference (Korzenny, website).

Research studies have shown that only 28% of the entire European population can read English with percentage even lower in South America and Asia. This means that for effective international marketing, communicating effectively in the regional languages is vital. According to the U.S State Department, U.S companies stand to lose $50 billion in potential sales from poor translations. Companies get themselves into trouble with translations that are inaccurate or culturally inappropriate. Professional translations on the other hand will convey a high quality image of products or services and leverage the marketing message (Visionarymarketing, website).

Over the past few years, trends toward globalization have led international corporations to conduct more cross-cultural survey research to validate overseas business opportunities in today's highly competitive global market. When time, budget and resources are no object, a company can afford the best that international research has to offer. However, today's economic downturn has compelled many businesses to face the harsh reality of shriveling timelines, slashed budgets and limited resources, therefore limiting their international research choices. Having said that, making concessions and trade-offs doesn't necessarily mean that enterprises have to compromise the quality of their international research in the process. In the context of the legitimate constraints caused by today's economy, it is essential that market researchers be aware of the need for a delicate balance between design uniformity and cultural customization.

The Need to Adjust for Cultural Effects

Companies with a worldwide presence must conduct research across all their global markets, present a combined corporate view, and contrast these markets to identify hot spots for special initiatives or new ventures. They need methods to minimize cultural effects and adjust results to differentiate response pattern differences due to language or cultural norms affecting surveys from real differences in performance or perceptions due to products, services, or market conditions. Hence, it becomes essential on the part of the researchers to address cross-culture calibration of measurements. In this context, harmonizing languages as part of questionnaire design and implementing the challenges that data collection poses, poses a challenge to the researchers (Devlin & Nicholas, 2004).

So how does one get good translations? Though there are online translation resources available, it may not be sufficient considering the cultural, regional and language disparities within the foreign market. It is always advisable to take professional help as it is critical to relate to the native speakers and the online resources may not be adequate in that regard. To illustrate the need for a professional help, here is an example of how incorrect translation would lead to a product failure.

A U.S. toothpaste manufacturer promised its customers that they would be more “interesting” if they used the firm’s toothpaste. What the advertising coordinators did not realize, however, was that in Latin American Countries “interesting” is another euphemism for “pregnant”.

To find a trustworthy and reliable translation service would be the next step. In the age of electronic communications, the researcher need not be limited to a local search. Translations can be easily delivered by e-mail, and under most circumstances, the project details can be discussed over phone. However for other logistical reasons, the researcher may find it more convenient to work with a provider in the home country. The following factors may be considered while appointing a translation service:

a. *Native Speakers*: It is important to find out if the provider works with translators who are native speakers of the languages. This is so because only native speakers have a perfect feel for their language. Working with native speakers will ensure that the translations sound natural to the audiences of various countries, and not like a translation from a foreigner. For example, a blonde woman is called a rubia by Cubans, a güera by Mexicans and a mona by Colombians.

b. *Specialist Knowledge*: It may not be enough to just speak the language. The people who translate the material must know the industry and the market in particular.

c. *Location*: The best translators are those who work from their native countries. As they are up-to-date with current developments and changes in the languages, it would be very helpful as the translations will be linguistically and culturally appropriate.

d. *File Formats*: To avoid extra work and costs, the researcher can choose a translation firm that can work with the same file formats as the researcher would use.

Once the translation provider has been decided upon, the researcher can work together with them closely in order to maximize the quality of the translations. While the researcher must allow sufficient time for the translation, it should also be made sure that the source material is written well. Providing as much background material as possible would help the translators understand the product-specific needs and hence result in a much closer translation.

What Are the Biases in Qualitative Methods?

Much empirical research involves comparison of two or more groups and the determination of differences between these groups with regard to a single factor of interest. The results of a study undergo statistical analysis based on the assumption that the groups are representative of the defined population and that the measurements taken on the sample were true reflections on what the researcher was actually trying to measure. In reality, however, a number of biases can complicate the analysis and interpretation of data.

Bias may be defined as any factor that tends to produce results or conclusions that differ systematically from the truth (Health.gov, http://www.health.gov.au/nhmrc). This includes errors in analytical methodology and errors of interpretation. Research is open to bias from many sources, including errors in statistical analysis. Most errors related to statistical analysis relate to failure to use appropriate statistical methods. Some examples would be failure to distinguish between independent and dependent observations, failure to adjust for confounding variables, or failure to appreciate the assumptions of normality and equality of variance underlying parametric significance tests.

Avoiding biases in international marketing research requires a lot of effort from the researcher. The first step would be to try and understand the research problem from the perspective of the foreign country. This is easier said than done because the root of the problem may be the researcher's lack of sensitivity and understanding to such cultural nuances. A feasible alternative would be to include researchers from different cultural backgrounds in the research team so that the team as a whole can consider all of the different facets of the research problem. At every stage of the research process, the researcher who is familiar with the specific culture takes the lead in conducting the study and the results are then compared across countries.

As with quantitative research, much of the potential for bias can be minimized through rigorous study design and the employment of various techniques. These include recognition by researchers that observers are also research instruments; "disciplined subjectivity"; explicit incorporation of the subjective aspects of interaction between researcher and participant into the study design; and 'triangulation', whereby information obtained is considered tentative until corroboration by information collected by other means.

How to Design Scales in Cross-National Research?

Douglas & Craig (1983) suggest that designing scales for international marketing research calls for a great deal of adaptation on the researcher's part. It has to be decided whether a single scale can be used in all of the countries or whether it should be customized to suit each country. Americans use a five-point or seven-point scale; however, people in countries such as France, are familiar with a 20-point scale. Semantics play an important role in the accuracy with which a scale measures any given attribute. Some cultures tend to overstate their feelings, while many others are modest. The word 'excellent' may connote different levels of perfection to Japanese and Italians. The scales used in domestic marketing will not be helpful to the researcher in analyzing the international market. This may be due to low educational or literacy levels and cultural biases that exist in various markets.

It has been observed that verbal rating scales work the best in international context. All respondents are accustomed to verbally express their feelings, irrespective of the country or the culture to which they belong. There could, however, be a problem with these scales. In some countries, 1 would be rated as the best while in other countries it would be the least preferred choice. The researcher should clarify this before asking respondents to rate attributes.

Research has been conducted to find out whether there is a pan-cultural scale. The semantic differential scale seems to be the closest to being a true pan-cultural scale. It consistently gives similar results in terms of concepts or dimensions that are used to evaluate stimuli, and also accounts for a major portion of the variation in response when it is administered in different countries. An alternative approach that has been attempted is to apply techniques that use a base referent, a self-defined cultural norm. This type of approach is likely to be useful in evaluating attitudinal positions where evidence exists to suggest that these are defined by the dominant cultural norm.

What Are the Equivalence Issues in Primary Data Collection?

When crossing cultural borders, the very meaning of a scale may change and classical quality indicators such as reliability and validity may be strongly influenced by cultural factors. Consequently, international marketing research calls for appropriate equivalence and comparability checks.

It is important for the researcher to be able to compare data across countries and hence, it is essential to examine the various aspects of data collection process and establish their equivalence. This is illustrated by the following example of a survey conducted in Europe (Min-Han et al., 1994). While initial data suggested that the percentage of Belgian women taking baths was far higher than any other nationality; a closer look at the data revealed that the time period was not comparable. In Belgium the women were asked if they had taken a bath in the last seven days. In all other countries the question had been, “Have you had a bath in the last three days?” The types of equivalence are briefly explained in the Figure 30.1.

Figure 30.1 about here

Construct equivalence deals with the function of the product or service that is being researched and not the method used in collecting the information. Different countries that are being must have the same perception or use for the product that is being researched. If this is not the case, comparison of data becomes meaningless. For example, if the bicycle market is being studied, it should be understood that it comes under the category of recreational sports in the United States and as a basic means of transportation in countries like India and China.

Measurement equivalence relates to establishing equivalence in terms of procedures used to measure concepts or attitudes. Three aspects will have to be considered to establish measurement equivalence

a. *Calibration Equivalence* – Equivalence has to be established with regard to the calibration system used in measurement (Kumar, 2000). This would include monetary units, measures of weight, distance and volume and perceptual cues like color, shape or form. Various countries around the world follow different units of weights and measures. Americans are used to weighing things by the pound or ton while the British and most of the commonwealth countries use the gram and kilogram. If the wrong terminology is used, responses will not be accurate. This is true for currencies also. For instance, one billion in the United States may not mean the same amount in the United Kingdom. Researchers should also take care to establish equivalence in terms of interpretation of perceptual cues. Colors also mean different things to different cultures. White, for example, is considered a symbol of purity and peace in the Western world but, a color of mourning for the Japanese (Jacobs et al., 1991). In the People's Republic of China, notes written using red ink suggest that the writer will die soon and the number four should be avoided at all costs as this too signifies death.

b. *Translation Equivalence* – The research instrument has to be translated such that respondents in all countries involved in the study understand it. The instrument should also contain equivalent meaning in each research context. This becomes more complicated when the researcher has to interpret and translate nonverbal clues. It may not be possible to translate a questionnaire verbatim into another language because of lack of equivalent words in the foreign language. For instance, there is no equivalent term for "husband" in Japanese. The researcher should focus on conveying the intent of the question to the respondent and obtain an answer that can be comparable across countries (Kumar, 2000).

c. *Metric Equivalence* – Metric equivalence is the scoring or scalar equivalence of the measure used. The researcher has to ensure equivalence of the scaling or scoring procedure used to establish the measure. Care should also be taken to establish equivalence in terms of the responses to a given measure in different countries. The scales used in different countries may vary depending on the culture and education level of the respondents. As mentioned earlier, in the United States researchers typically use a five or seven point scale; however, there are countries where scales can have as many as 20 categories. When the sample consists predominantly of people incapable of reading, pictorial scales are used. The specific country also determines whether the scale should be unipolar or bipolar and whether there should be a neutral point on the scale. For instance, researchers studying the Japanese market design scales with no neutral point, as the Japanese tend to remain neutral if given a choice. The researcher should also ensure equivalence of the response to a given measure in different countries.

Lack of metric equivalence in the complete set of measures may occur due to cross-national differences in response styles (Baumgartner & Steenkamp, 2001). The term response style refers to a person's tendency to systematically respond to questionnaire items on some other criterion that what the items were supposed to measure (Paulhus, 1991). Baumgartner and Steenkamp (2001) described a procedure to clean observed scores from stylistic responding by regressing the raw summated scale scores on response bias indices.

Sampling equivalence is concerned with the decision making process. For instance, if the purchasing behavior regarding toys is being studied, researchers need to understand that while in the United States children get to select their toys in other countries parents may make the purchase decisions. Hence while collecting information, children in United States need to be interviewed and parents in other countries.

Analysis equivalence deals with addressing the various biases that might exist in different cultures. Different countries differ in their assessment of situations and problems. For instance, Japanese tend to take a neutral point, so it is wise to avoid a scale with a neutral point in order to obtain useful information. Likewise, Latin Americans and Italians tend to exaggerate their response and Americans do not typically go into details with open-ended question. Factors such as this should be kept in mind while designing the scales for measurement.

Thus, establishing equivalence for an international marketing research study is an important task and requires judgmental decisions on the part of the researcher. The researcher will have to decide on the methodology that will work in the respective country.

How to Conduct Market Research with a Small Sample Size?

When conducting cross-country marketing research, researchers may deal with a smaller sample size, thereby putting a check on the research exercise. This may also affect the subsequent analyses that follow the sampling stage. In such a scenario, it is advisable to go in for country pooling technique. That is, *similar* countries can be pooled to get a sufficiently large sample to carry on with a 'normal' research process. The key here, is to identify similar countries that can be pooled together for, the otherwise may lead to highly skewed and unusable research results. The pooling can be done according to three factors. They are:

a. *Economic status* – Countries can be clubbed on the basis of economic conditions. This type of similar pooling would give the researcher a larger sample to work with, apart from keeping the research results from being skewed. Factors such as economic wealth, market potential index, Gross National Product (GNP), population, inflation, price levels, unemployment rate and interest rates are some of the factors can be considered for pooling countries according to economic similarity. This type of pooling would be suited for studies involving effects of prices on sales and marketing mix models.

b. *Cultural setting* – The cultural setting is probably the most challenging among the three factors to international marketers. The cultural factors that can be considered for pooling are measure of high/low context culture, attitudes of people, differences in lifestyle, religion, language, literacy, values, work ethics, role of family and gender roles among others. For this type of pooling, Hofstede's classification of countries on the basis of Individualism Vs. Collectivism, Power Distance, Uncertainty Avoidance, Masculinity Vs. Femininity and Strategic Orientation (short term vs. long term) may be utilized. The challenging part of getting this pooling right is that, the marketer must be aware of the frame of reference used in their decision to pool any set of countries. Once a frame of reference is established, it becomes an important factor in determining or modifying a marketer's reaction to situation, especially if experience or knowledge of accustomed behavior is lacking. Consider Belgium, which is neatly divided neatly in half, between Flanders in the north and Wallonia in the south (Sager, 1997). While the Flemish people use margarine, Walloons use butter. Thus, cultures could vary within a single country and this factor should be considered while adopting a culture pooling technique. This type of pooling would be suited for product positioning and product acceptance studies.

c. *Geographical proximity* – Under this type of pooling, countries within close proximity can be considered. Factors that can be considered for this type of pooling can be size of the country, its close neighbors, common climatic conditions and demographic indicators among others. This type of pooling would be helpful for segmentation studies. However, caution must be exercised while pooling countries that are geographically closer. For instance, even though Canadian market may feel similar to the United States market due to their geographical proximity, both countries should be addressed as two distinct cultures.

Thus clubbing of countries into similar pools would help researcher in solving the small sample size problem. The key here is to, consider the nature of the study and then use appropriate pooling technique to achieve significant research results that can be better used for developing effective strategies.

Interpretation of Data from one Country to Another

Interpretation of data is a major aspect in qualitative and observational techniques and it is entirely dependent on the researcher. This is where the Self-Reference Criterion (SRC) comes into play. The researcher may have problems attributing the right reasons for a purchase behavior. If for instance, in a developing country, a consumer were to choose a product that has been packaged in aluminum container instead of a plastic carton, the reason could simply be that the consumer plans to use this container for storage purposes after the contents have been used. An American researcher could not be faulted for attributing reasons of efficient recycling as the motive for this purchase. This error in interpretation could mean a big blunder when it comes to positioning the product.

In some cases, researchers find it easier to develop research instruments specific to one country and then coordinate and compare across countries. Here, both researchers who are familiar with the country and those who are not, examine the instruments and the data and draw conclusions. The second method of considering one country at a time and then comparing is preferable even though it is time consuming. This method also poses a number of intersection problems, as researchers from different cultural backgrounds have to be in constant touch with one another.

Relating Cross-cultural Research Insights to Cross-cultural Strategies

The success of any international research study is, how well the cross-cultural research insights translate into cross-cultural strategies that can used effectively in real time. Based on the emergence of globally shared meanings, (Alden, Steenkamp, & Batra,

1999) has designed a new brand positioning strategy designed to assist international managers who seek to strengthen their brand's equity in an increasingly competitive marketplace. The global consumer culture positioning (GCCP) strategy is defined as one that identifies the brand as a symbol of a given global culture. This is done by using meaning transfer (McCracken, 1993), an advertising process in which the brand is associated with other signs such as language, aesthetics and themes that reflect the cultural orientation. Examples of brands that have used such strategies include Sony ("My First Sony"), which positioned one of its products as appropriate for young people around the world; Philips ("Let's Make Things Better"), whose advertisements explicitly feature people from different countries; and Benetton ("The United Colors of Benetton"), whose slogan emphasizes the unity of humankind.

Another type of consumer culture positioning is the local consumer culture positioning (LCCP) strategy. This strategy is defined as one that associates the brand with local cultural meanings, reflects the local culture's norms and identities, is portrayed as consumed by local people in the national culture, and/or is depicted as locally produced for local people. Examples of brands that have utilized this strategy include, Chevy Trucks and Dr Pepper soft drinks. They have been positioned in U.S. as part of the "American" way of life.

The third type of consumer culture positioning is the foreign consumer culture positioning (FCCP) strategy. It is defined as a strategy that positions the brand as symbolic of a specific foreign consumer culture; that is, a brand whose personality, use occasion, and/or user group are associated with a foreign culture. For instance, the use of

“Singapore Girl” in Singapore Airline's global media advertising indicates the association of a brand with a foreign culture.

Scope of Consumer Culture Positioning

There are three central components to a cultural symbol set. They are language, aesthetic styles, and story themes. As the primary language of international business, the mass media, and now the Internet (*BusinessWeek*, 1996), English signals modernism and internationalism to many consumers. Hence, one way of effective GCCP communication is to use English words, written and/or spoken, in its communications. However, a brand manager incorporating LCCP would want to highlight the local language. And for using FCCP, a brand manager may use spoken and written words from the foreign culture in its advertising and/or brand name.

The English language consists certain aesthetic styles that are becoming recognized as part of global consumer culture. For instance, while using spokespersons in advertising, it is possible that a separate set of characteristics would reflect GCCP and thereby, lend to the brand a more global image (e.g., Michael Jordan for Nike). While, an American businesswoman driving a Chevrolet in a U.S. television advertisement would reflect local culture, a German engineer spokesperson for Audi in a U.S. television advertisement would be reflecting a specific foreign culture.

The alternative consumer culture positioning may also be indicated by the aesthetic construction and display of brand logos. For instance, certain logos may be tied less to specific cultures in terms of their appearance, such as AT&T (abstract globe), Nike (swoosh), Royal Dutch/Shell (shell), Mercedes-Benz (three pointed star) among others. Certain logos may be more symbolic of specific cultural traditions, such as Cathay

Pacific, when they changed their logo to a white Chinese calligraphy stroke that suggests the wing of a bird to "give itself a more Asian air" (The Asian Wall Street Journal Weekly, 1994). It is also possible that most consumers would view the logo in its aesthetic entirety (including shape, color, texture, and overall design) and form associations to global, foreign, or local consumer culture.

Thus, identification of country, consumer segment, and product category factors that favor the use of GCCP, FCCP, or LCCP, is an important issue for mangers. While there are brands that use LCCP or FCCP, there is also the case of locally based marketers, who use GCCP, to fight global brands. For instance, local brands in Indian market such as Videocon (consumer durables), Amrutanjan (pain reliever), and Kenstar (appliances) show data on exports or visuals of foreign consumers consuming their products, to indicate that their product is of international quality. Thus, managers have to ascertain the country, consumer segment, and product category factors in order to come up with a suitable strategy that would convey their brand(s) effectively to the targeted audience.

Summary

International Marketing Research thus links the organization with its future markets. It includes activities such as specification, gathering, analysis, and interpretation of information to help the management understand a particular market, identify the market specific problems and opportunities, and develop courses of marketing action. The research activity must recognize the country specific diversity in terms of culture, demographics, economy, etc. to yield a marketing strategy that will be both applicable and successful.

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Table 30.1

Idiosyncrasies of Select Regions

Asia	Europe	Latin America	Middle East
The Chinese have a habit of telling a person whatever they believe he or she wants to hear, whether or not it is true. This plays an important role while conducting surveys. Surveys in China, when approved by authorities lead to higher response rates implying a strong presence of bureaucracy. Chinese respondents are cooperative and eager to try new products. They are also more patient when compared to their Hong Kong counterparts. The Chinese get uncomfortable when questioned on family and financial aspects. The Japanese's purchasing behavior is centered more on the vendors selling the product than on the product itself. This denotes brand loyalty and the importance placed on quality and reliability. They prefer the use of title and first names to be avoided. They are an extremely group oriented and community-based people.	Given the excellent telecommunication network, it is normal for a Swede not to reciprocate calls. The French believe in status and often do not mingle between groups. They believe that one is born into a class. The French value their personal time at home and often are unreceptive to questions being posed. In Germany, it is important that the dealings are made specific either in writing or verbally. They are intensely private and tend to keep their opinions to themselves. While the Germans prefer one-to-one talk to telephonic conversations, the British take more to telephone calls than to direct marketing programs.	Most Argentines maintain little physical distance between speakers and tend to broach personal issues pertaining to family. They are frank in voicing their opinions, but take extreme care in being diplomatic. Most Latin Americans are uncomfortable talking over telephone or responding to mail and prefer one-to-one interviews. They prefer the respondent fees in kind than in cash. Latin Americans have a great difficulty in saying 'no' for an answer. Likewise, asking favors is common in Latin America. It is advisable to say that "I shall try" rather than a firm "no". Measuring purchasing power of consumers in Latin America with income level may not reveal the true picture. This is so because, the actual number of consumers who have income that are willing to spend on foreign products is much lower than expected.	In the Middle East, direct eye contact for too long is considered offensive. Likewise, private conversations and whispering while in a group is considered rude. It is best not to admire the possessions of an Arab host. They feel obligated to give the items to you. In a recent AMER World Research survey, the new generation of Arab respondents were found to be conservative in their clothing styles, considered family and marriage to be strong institutions and believed that while women should get more prominence, the family takes the precedence. Nonverbal communication is complicated in Saudi Arabia and most Arabs express themselves using different gestures.

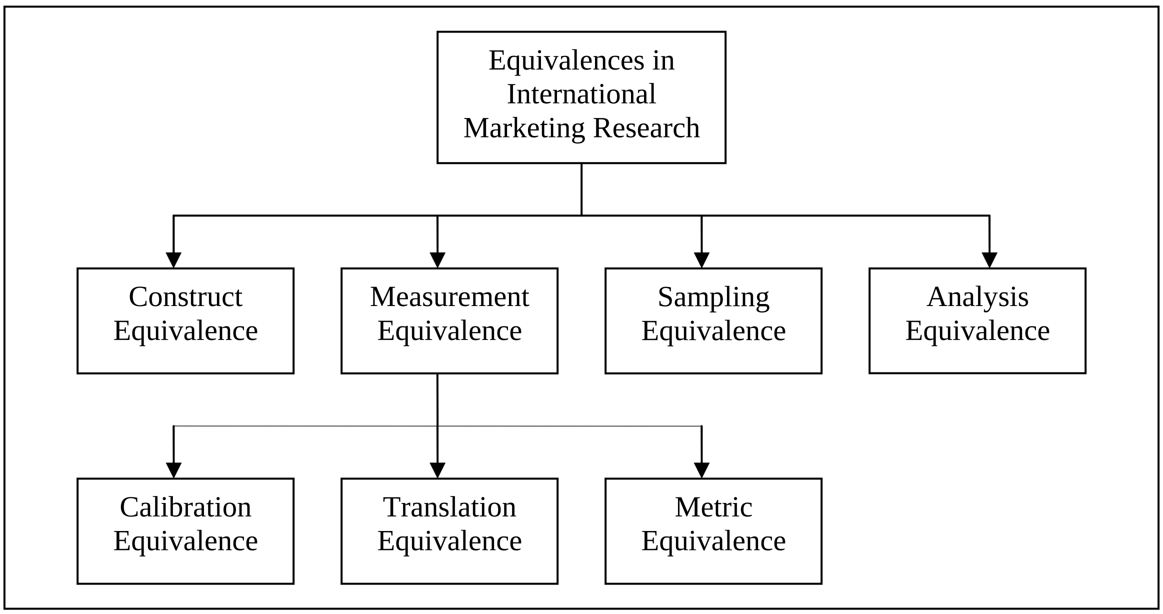
Table 30.2 Top 10 Players in IMR Industry (in 2003)

IMR firms	Headquarters (Parent Company)	Services Offered	Global Research Revenue (U.S $ in millions)*
VNU (www.vnu.com)	Haarlem (Netherlands)	Marketing Information, Media Measurement and Information, Business Information and World Directories	$ 3,048.3
Taylor Nelson Sofres plc (www.tns-global.com)	London (U.K)	Market Segmentation, Advertising and Communication, New Product Development, Brand Performance and Stakeholder Management	1,565.1
IMS Health Inc. (www.imshealth.com)	Fairfield, Connecticut (U.S)	Market information to pharmaceuticals and healthcare industries relating to: Business Intelligence Products, Sales Force Effectiveness Information and Over-the counter Services	1,381.8
The Kantar Group (www.kantargroup.com)	Fairfield, Connecticut (U.S)	Marketing and media services, software data systems for data analysis, consumer-understanding, branding and communication, innovation, channel management and service measurement	1002.1
GfK Group (www.gfk.com)	Nuremburg (Germany)	Consumer Tracking, HealthCare, Non-Food Tracking, Media Research and Ad-Hoc Research	673.6
Ipsos Group SA (www.ipsos.com)	Paris (France)	Advertising Research, Marketing Research, Media Research, Public Opinion and Social Research and Customer Satisfaction Research.	644.6
Information Resources Inc. (www.infores.com)	Chicago (U.S)	Market information to consumer packaged goods (CPG) and retail industries relating to: Market Content, Analytical Services and Business Performance Management Services	554.3
Westat Inc. (www.westat.com)	Rockville, Maryland (U.S)	Survey research services in areas like: Health, Epidemiological Research, Education, Environment, Energy, Transportation and Federal Social Programs	381.6
Synovate (www.synovate.com)	London (U.K)	Worldwide custom market research to multinational companies ranging from FMCG to technology.	357.7
NOP World (www.nopworld.com)	London (U.K)	Custom and research based consulting services relating to: Automotives, Business & Technology, Consumer & Retail, Finance and Health	335.6

(Source: Jack Honomichl, "Honomichl Global Top 25," Marketing News, 15 August 2004: H4)

Figure 30.1

Equivalences in International Marketing Research



Source: Adapted from Kumar V, "International Marketing Research", (Prentice Hall, 2000)