Is Global Research Different?

Global research both differs and shares similarities with research done in the United States.

By Brad Fremont

In this first Marketing Research column on global marketing, I give an overview of global marketing research from the U.S. perspective, borrowing heavily from a popular talk by George Fabian. Now retired, Fabian's research career included research director positions at Cheesborough Ponds, Campbell Soup Co., and a number of New York advertising agencies. In the late '80s he joined Audits & Surveys Worldwide to start its international division, which he headed until 1998.

Fabian first gave the presentation, "Global Research, is It Different?" in 1994 at the New York chapter of the Advertising Research Foundation. In the months following, he gave the talk to research departments at companies in the New York area. I worked with Fabian on a number of global studies and accompanied him to presentations of the "Is It Different?" talk at many companies. Regardless of whether we were at a packaged-goods manufacturer, a service firm, or transportation company, the talk always hit home. And Fabian's observations are as applicable now as they were then, when there was much discussion of the need for global marketing.

When done globally, is research different than when done in United States? The answer is "definitely yes," and it's also "definitely no." The requirements for global marketing are:

- A global business strategy.
- A financial program that assesses the opportunities globally.
- An ad campaign that is truly global or encourages local adaptations.
- A tracking study to plan and evaluate these efforts.

According to another research practitioner, Joe Plummer, executive vice president, director of brand strategy on global accounts at McCann-Erickson Worldwide Inc., consumer research increasingly will adopt a global perspective—one that will use the complex, project-management skills that will be required to follow rigorous research designs, while also practicing multicultural sensitivity. Plummer is right. When comparing results between countries, many variables can inhibit analysis. The ways in which scales are addressed by respondents is just one of these. Rigorous research designs are required to eliminate as many artifacts of the research process as possible so energy can be spent on the real differences, such as scaling.

The research process is divided into four stages: planning, design, execution, and interpretation.

PLANNING

Planning is what is most different in global marketing research from research done in the United States. In the planning stages, global research requires formalizing a number of components frequently handled as a matter of course in domestic research. Of course, the objective must be identified and agreed upon. But in addition, other issues to identify and agree on include:

- Who is the key client(s)?
- Who has input on what?
- Who has sign-off on what?
- Who will get/interpret/use the findings (and in what order)?
- An "angel" should be identified.
- Whose budget?

One misconception about global research centers on cost. The fact is that many kinds of research in the United States are a relative bargain. The reasons for this include that in the United States, we have an infrastructure that allows us to use interviewing techniques that turn out to be more economical (mail intercept and telephone). The cost of local and long-distance telephone service is lower in the United States than in much of the world. While door-to-door interviewing now is rare in the United States, it is common in many countries.

Other costs that are not usually a part of our domestic research projects include multiple translations, international coordi-
does not have decision-making authority on all topics, he or she should have ready access to those who do.

Expect to be somewhat heavy-handed. Although there may be compromises and inputs from a variety of sources, the project leader must be able to clearly articulate the decision that has been made in a manner that is not open to interpretation and that is understood as the final word on the subject.

Although good project managers confirm project specifications in writing, it's very important that the planning stages of global projects be documented in writing as well. Given the scope of the decisions frequently made from global research and the associated costs, good documentation is more than prudent.

Stick to schedules and budgets as much as possible.

Establish communications processes that will be used to coordinate with local research firms, regional offices or global subsidiaries, and so forth. Check versions of software and opportunities for e-mail communications.

Compare your clients for budget shock. A joke that was told in the early ‘90s is still not far from the truth: "Global research is twice as expensive and takes twice as long as research in the United States. Unless one is talking about Japan, then it's three times as expensive and takes twice as long."

**DESIGN**

When designing the project, think of your objectives rather than whether or not it can be executed. Things to think about in the design stage are:

- **What cannot be standardized?**
- **Is it affordable?**
- **Will it be actionable, and at what level?**
- **Will it be comparable?**
- **How to execute it locally vs. centrally coordinated?**

The considerations for local vs. centrally coordinated include:

**Local**

- Lower out-of-pocket costs
- Get local offices involvement
- More local flavor in design and execution
- Coordinated by sponsor

**Central**

- Coordination costs extra
- Limit or keep out local offices
- More comparable methodology
- Coordinated by research company

Consider how you would go about designing a study to address the same issues if it were in the United States. While the data-collection methodology might vary, the basic design might very well work abroad. Plan the study at a global level, then modify locally as needed.

Global research requires, even more than domestic research, that marketing researchers think in terms of analysis and interpretation at the design stage. The higher visibility and higher costs of international research raise the stakes in doing the project right.

Conduct research in fewer countries, and do it better. Eliminate "comparable" countries. Depending on the issues under investigation and the objectives of the research, marketing researchers might be able to draw the necessary conclusions from conducting research in just a few countries in a region rather than all of the countries.

Also, select countries objectively, not politically or for budget reasons. When the findings are being presented, the political and the budget rational for having omitted particular countries won't seem valid.

Insist on your design (after local conditions have been considered), at the same time keeping an open mind.

Central control is essential. This is true regardless of whether the research is being executed through local research firms or though a single, coordinating research company. Only execute through local firms if sufficient coordinating staff is available at your location.

And always exercise caution with syndicated studies, which require "local norms."

**EXECUTION**

It's important to be aware of the local differences and nuances in a number of areas including design, respondent availability, and in field execution, and quality. Think about the areas of the study that need to be comparable, as the actual data collection methodology might have to vary country to country.

Interviewing services with facilities in "shopping malls" don't exist in most countries. In-person interviewing is done either in the home with interviewers going door-to-door, by street intercepts where the respondent is invited to a meeting room or hall, or by prerecruitment. The penetration of telephones in individual homes varies a lot, in some countries it is as low as 10%. In Japan, where telephone penetration is not a problem, it's considered a discoutry to conduct an interview considered very long.

The way in which respondents interact with interviewers varies greatly. In some lesser-developed countries, there is a real desire to please the interviewer. This, along with other cultural differences, results in the variation in scaling. Differences also exist between "no answer" and "refused."

While the United States has different social classes, the lines between them are much less distinct than in other countries. In Latin America, it's physically difficult to get near the A- and AB-level homes. Always check with locals about the mixing of different socio-economic groups. This holds true in qualitative research in which mixing of social classes will at minimum be most unproductive. In some countries, mixing genders does not work, and in some Middle Eastern countries, this even extends to quantitative research in which males interview females and females interview male respondents.

How do you deal with all these differences and variations? Fabian recommends the following: Realize that there are enormous differences and complexities, even within a country, and work with someone who understands them.
INTERPRETATION

The primary issue with multinational qualitative research is, can it be pulled together? Can a coherent story be told from the information collected? In quantitative studies, political, technical, and cultural issues need to be addressed and taken into consideration.

On the political side, think about a multistage approach for the analysis and presentations, with each tailored to your audiences (such as headquarters, region, and county). Don’t be afraid to “globalize” the conclusions and recommendations; that is, compare countries and regions and draw conclusions if you do not articulate the conclusions, someone else will.

Be sure to understand each country’s procedural uniqueness such as scaling differences, general skepticism, and “yes-saying” countries. You should be aware of any country-by-country methodological differences in sampling or data collection.

Wherever possible, synthesize the conclusions using multinational information from all relevant (both internal and external) sources.

THE OPPORTUNITY

To illustrate that a real opportunity exists for marketing researchers skilled in global research, Fabian closed his 1994 presentation with a number of quotes from Peter Drucker, the business consultant, teacher, and writer. In his 1993 book on business in the coming century, Post Capitalist Society, Drucker wrote, “The foundation of any global system organization must be fed by information. In most global companies, management’s ability to globalize has outstripped their ability to understand their consumers and prospects in the countries in which they operate.”

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