



Multi-country research studies

- Best international research practice**
- Research in the Far East**

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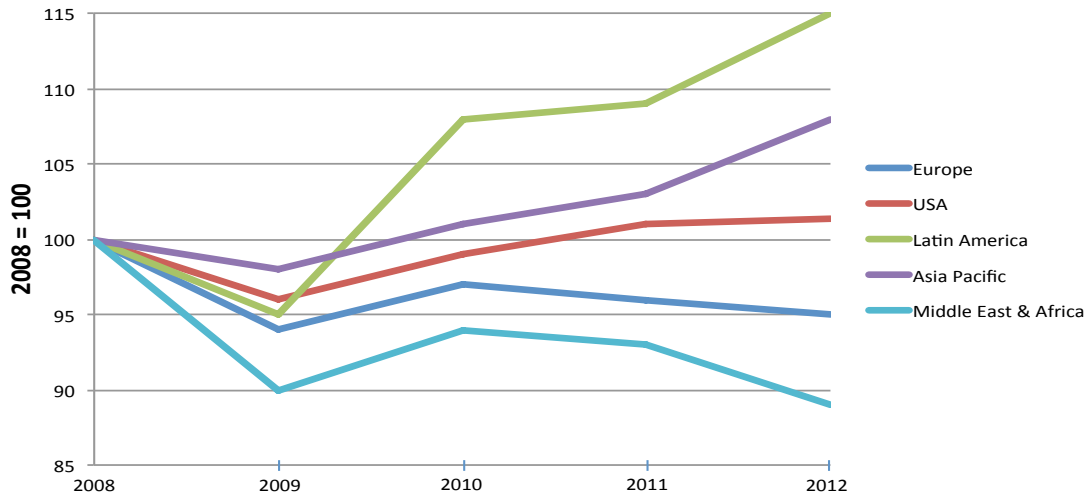
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International research – overview & best practice guidelines

As globalisation accelerates and organisations become ever more international in their vision and day-to-day operations there is a growing need for high quality, ‘cross-border’ customer insight to guide brand strategy. ESOMAR trends confirm that spending on market research has recovered particularly rapidly in the **developing markets** of the Far East and Latin America, following the 2008 crash.

Market research spend by region, 2008 – 2012

Source: ESOMAR



Much of this international research is ‘incoming’ - an investment by mature firms headquartered in the slower-growth economies of the UK, Europe and the USA but keen to prospect for new opportunities in the fastest growing, most populous parts of the world. New product development, international brand alignment and local brand optimisation are all essential to build strong positions in these new markets – and all necessitate good understanding of very different and diverse consumer cultures.

Multi-country research is a complex process, requiring careful design and tight management of local research partners – the people doing the research on the ground. Based on Moog’s extensive practical experience of both Qualitative and Quantitative international projects, this short paper sets out some of the pitfalls that clients need to be aware of in the commissioning process and suggests ways in which the process can be ‘de-risked’ to ensure positive, useful results.

What are the risks?

We would highlight **four** crucial risk-areas facing any major trans-national consumer project – the ‘Four B’s’:

- ‘Bread’** International research does not come cheap!
- ‘Babel’** The brief and the insights becoming garbled in translation.
- ‘Blancmange’** The temptation to settle for dull, lowest common denominator answers.
- ‘Backbiting’** Defensive local brand management feeling threatened and ‘rejecting the transplant’

Let’s consider each of these issues in a bit more detail - and the best ways to avoid them. Many of our suggestions may sound like simple common sense (indeed we hope they do!) – but it is surprising how often these guidelines are not followed in International projects, leading to disappointing results.

1) 'Bread'



Research costs vary considerably from country to country – but there's no getting away from the reality that multi-country projects inevitably make a single-country study seem quite tame. This is especially true of Qualitative projects requiring 'up-close' concept testing by experienced, bi-lingual local practitioners – but even an online project means paying to access local consumer panels, questionnaire translation and so on. There is no 'magic bullet' – but there are approaches that can be used to keep costs real and ensure that the investment turns out to be well spent at the end of the day.

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UK-based Expat Supergroups as the 'pilot'

The UK - and London in particular – is the most cosmopolitan location on the planet, making it possible to recruit and talk to recently-arrived foreign nationals from just about every target location without leaving Britain. Expat Supergroups are large, 10-12 person workshop groups recruited in the UK which can be invaluable to road-test ideas ahead of the main-stage research and gain an early insight into the key differences and cultural drivers in each territory. For example, in a recent food-development project we talked to groups of American, Indian, Japanese, Chinese and Arabian consumers in London prior to the main fieldwork – enabling us to refine and improve test concepts and discussion processes and avoid potential pitfalls. The trade-off between an Expat pre-stage and a somewhat smaller sample in the target countries can prove very worthwhile.

Social Media Listening

Social Media take different forms in different countries - Weibo and Renren in China for example, not Twitter and Facebook. But whatever the format, social media like these provide an important passive-listening opportunity to help provide insights at the start of a project which create efficiencies later on. The challenge is how to harvest local insights intelligently, affordably & fast - within the discipline of the client brief and objectives. Moog's relationships with leading business schools in the UK give us access to bright, highly motivated and intelligent people from all over the world – a resource which we can tap-into to make very effective use of the Social Media part of an assignment.

Fewer Airmiles

The convention when carrying out multi-country Qualitative research is for executives from the co-ordinating company to go out and monitor fieldwork at first-hand, with a translator alongside. Whilst we would never argue against this as the ideal, airfares, hotel bills and translators all add cost. For projects with a tight cost-cap we have successfully substituted close briefing & debriefing communication by Skype and Phone for a direct presence on the ground. This works best in regions closer to the UK in culture (the Eurozone & USA) and is probably not best advised for other parts of the world where first-hand exposure by the observer is a must – but it is potentially useful way to limit costs. The fact that Moog works only with experienced, mature professionals in each country is essential in making this work; we have a network of such partners worldwide – people who have 'been there and done it' often enough to be quick on the uptake, highly perceptive and very tuned to client needs. We do not work with inexperienced younger execs, as can sometimes be the case with the larger research firms.

International Teleforums

Teleforums are – in effect – small focus groups run by phone from a central location, using concept materials which all the participants view securely and simultaneously, online. With bilingual, UK-based moderators at the helm Teleforums can provide a lower-cost supplement to the groups and interviews carried out on the ground. They are not a full replacement for 'eyeball-to-eyeball' research – but they can work well to stretch a budget and provide additional coverage of each territory at affordable cost.

2) 'Babel'



With several different countries - each with its own language and cultural assumptions - the greatest risk in any international research project is miscommunication. Unless properly managed this can happen at any stage, from briefing the local research partners through to the way fieldwork is managed and reported. The ideal is to maintain a strong grip from the centre whilst being flexible enough to allow local differences to surface – which is, after all, the point!

Full, upfront briefings – with client participation

At the planning stage we book time with our local partners to go through the written brief - carefully prepared in advance - on the phone or nowadays by video-Skype. These verbal briefings typically last for around one hour and we ask our clients whenever possible to join the conference and give the local researcher the full context from their point of view. Time invested with local partners at the outset is never wasted and ensures that we don't hurtle into the process blithely assuming that the plan hatched at the centre will work in an identikit fashion in all territories.

Concept translation with local researcher involvement

Concept drafting and production is a core feature of the way Moog works with clients to develop and test ideas, to get the most out of research. But assumptions and ideas expressed in the language of the 'lead' country may not always translate literally into a foreign language and culture. Involving local research partners early-on as concept translators and / or 'checkers' ensures once again that wrong assumptions are spotted and overcome before they become a problem.

Reporting templates

The best way to prevent 'mission-creep' is to prepare a reporting template based on the lead-country, which is then followed by all other countries when documenting their local insights and findings. The report-template ensures a common core and guarantees that all the key issues are properly and fully reported – but it is also designed to enable local nuances and differences to be flagged-up, so that the localised differences in each territory are also fully understood.

Reporting conferences

Best practice is for the researchers in each country to report not just in writing but verbally as well, taking the project coordinators and client through the detailed story and expanding on any themes or subjects which have surfaced as being especially significant for consumers in that specific territory. These debrief conferences (again by phone / Skype) are rich in insight and typically last between one hour and 90 minutes.

A unified final report

Once all fieldwork is complete and the individual country-reports have been delivered, Moog always compiles a unified, multi-country report which doesn't simply rehash the different territories but adds the strategic overview and the main cross-country recommendations.

3) 'Blancmange'



In multi-country studies there is often be a tendency to seek the 'vanilla' answer – the lowest common denominator, one-size-fits-all solution which leads to undifferentiated propositions and dull marketing communications. Preserving 'edge' and distinctiveness across diverse cultures means staying alert to the clues as they emerge during research in each country, and remaining nimble in rather than managing the process on autopilot.

Concepts are key

The most important factor in uncovering a competitive, distinctive strategy lies in developing concept materials at the outset which provoke a real response from consumers – and this is as true offshore as it is back home. Concepts which push-out to the edge of the envelope are often the most productive and we always encourage clients and their agencies to include more extreme ideas along with 'safer bets' in order to generate more insight in research.

Interactive, not passive research

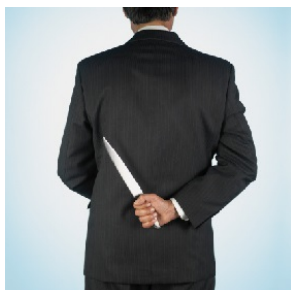
Whatever form the research takes – for example focus groups, telephone depths or Teleforums - our mantra is to push consumers not just to respond to concepts but to co-create solutions with us, building on our ideas

and offering-up there own. This 'interactive' type of research is less commonly practised outside the UK and we therefore design it into the process very carefully, giving local research partners a very clear set of guidelines to follow and using their advice to adapt these to the local situation and culture.

Learn-as-you-go, stay nimble

A new idea or insight from one country during the project can often be fed-back into other territories – and to do this we stay in close contact with partners all the way through, not just at the beginning and end of the process. In this way we can rapidly spot a potential breakthrough solution and – with client approval – inject the idea back into the research process everywhere before completion. Again, this is not an approach commonly practised by the larger international combines and is one of the advantages of a more hands-on way of working.

4) 'Backbiting'



Local or regional managers can be quite defensive of their turf when they feel that international research is being driven from the centre without sufficient prior consultation in their territory. This can result in an unwillingness to implement the findings at the end of the project, so it's a good idea to take pains both during and after to keep local management on-side.

Early manager involvement on the ground

Best practice wherever possible is to get local brand managers involved in the process early – for example by inviting them to participate in the briefing conferences for their territory. Regular project updates are also vital to keep local management feeling informed and empowered right through the process, and inviting them to view the research in their territory promotes a spirit of openness.

International brand management workshops

Where the issue is especially sensitive – for example when a client is seeking to align a brand more closely across

different territories with, say, a common advertising or packaging solution – the answer can lie in designing the research as the stimulus for a multi-country brand workshop in which the managers themselves generate the solutions in response to consumer insights captured on video. This is a technique we have used very effectively in the car market, collecting and pre-editing ethnographic video-interviews from consumers across several countries to illustrate their similarities and differences. Instead of a conventional debrief, the climax of this type of project is a multi-country workshop facilitated by Moog, at which the country managers work in teams to evolve the best-fit solution for all the regions involved.

Summary

International research has never been more important – but it throws up a whole series of issues which need careful handling by experienced, mature personnel. Moog has a great deal of know-how in this area and uses a variety of techniques designed to maximise the value of the investment and minimise the risks

Focus on the Far East

Asia is a rapidly changing, diverse continent which contains a 1/3rd of the world's population – and even within one country there are often significant variations in ethnicity, language, dialects (over 300 in India for example) and values. The diversity between countries and cultures makes it hard to generalise – but here are some of the themes one needs to be aware of when carrying out research in the Asia-Pacific region.

Avoiding programmed responses and received opinions



The ability to express individual viewpoints which is taken for granted in the West is not so straightforward in Eastern cultures, where the habit is often simply to repeat truisms learnt at school or put-out through national/government channels and (sometimes) censored news media. Education in Eastern cultures tends to be about learning 'facts' according to the government curriculum – and whilst there is growing awareness of the need to teach interpretative thinking and analytical skills, governments have struggled to implement this and typically fall back on fact-based learning. Indeed the western notion of individuality is not always present in Asian Societies and is often subjugated within a broader group context, making it harder to separate individual needs and motivations from 'programmed' comments reflecting the community orthodoxy.

In group-based research this can translate into the expectation that any question demands an orthodox, given answer - so the process needs to be designed to get under the radar and overcome the barrier of 'group-think'. Provocative stimulus materials are one key, but there are other techniques which can really help such as using recruitment filters which deliberately select-out more individualistic thinkers and then putting respondents into smaller units and tasking them to generate their own ideas and solutions.

'Respect'



The notion of 'respect' pervades most Asian Societies and underlies many cultural values and normative behaviours - including a polite and considered approach to any discussion. In Thailand for example, it's broadly defined by the expression 'Gheng Jai' which has no literal translation into English and has a depth of meaning far greater than mere 'respect' or politeness as we understand them. The word 'jai' itself means 'heart', and is applied to a multitude of concepts which define emotional belief or response, good and bad.

Respect for one's seniors whether in the family, amongst friends or in the workplace can be a barrier to the expression of individual ideas in a group or even online situation involving people of different ages or genders. Asians have historically been very family-centred and the role of the 'senior' - typically the father or Grandfather - is to define the behavioural norms and values of these groups. Extended into the wider community this translates into powerful collective belief-systems which are passed down through the generations. Talking to individuals from these environments can be rather like hearing the voice of the community founder!

A crucial factor for group-based research in the East is to think very carefully about the composition of the group – for example the mix of ages and genders – so as to reduce any pressure towards overly deferential responses.

India and the love of debate for its own sake

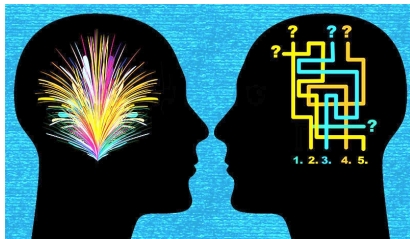
Amongst some communities the idea of 'respect' can – paradoxically to our eyes - take a seemingly almost aggressive form. In India, for example to be 'respectful' sometimes requires what to most western observers would appear to be an impolite, outspoken approach to any discussion! Typically, Indians welcome debate and enjoy



discussing ideas. In Delhi and Mumbai specifically this can take the form of loud, aggressive behaviour - often personal and insulting (in our terms), but seen locally as the 'respected' thing to do. The impression given is that he who shouts loudest has the most impassioned and heartfelt opinions!

Because of the intense dialogue displayed (for example in Delhi and its locale) an Indian focus group often needs to last longer and a powerful moderator is required to maintain order and keep the discussion focussed on the core issues. In Southern India the discussion will usually be less heated but can be equally lengthy as individuals vie to express their opinions.

Uncovering emotional as opposed to purely rational drivers



In some Eastern countries public expressions of emotion remain very restricted and consumers in research will tend to default to rational rather than emotional responses unless the process is specifically designed to assist them to access the emotional dimensions of the idea. South Koreans for example have only in the last 10-15 years begun to accept the role of emotion (and humour) in sales and marketing and are still learning about these elements as a facilitator in business transactions. Like the Japanese

they are very formal in their working lives – although under the surface they are a passionate race and 'out of uniform' are great communicators who can be very honest with their opinions when they feel permitted to express themselves.

Language itself can be a significant barrier to uncovering the deeper insights about consumer motivations and needs. Some languages are simply less rich when it comes to expressing ideas, and the possibility of miscommunication or misinterpretation is real even amongst friends or workmates from similar backgrounds. In Thailand for example the somewhat simplistic structure of the language limits emotional responses and can be often a barrier to detailed understanding even amongst close colleagues and work-mates.

In researching new concepts, pictures and images, used projectively, are often required to transcend the limitations of language and thus concept materials need to be pictorial – not just verbal. Carrying out the research in informal environments is also very important in countries like Korea, where people are typically very serious when working in a formal, 'office-y' spaces.

Specific taboo areas and social codes



Every culture has its taboo areas – and these can get in the way of the insight process. For example, the national stereotype of Thailand is a land of welcoming, warm and informal people - 'The land of Smiles'. Under the surface however the opposite is frequently closer to the truth. Thai people often hold very personal agendas; they actively seek personal opportunities BUT will never clearly articulate this and are driven by strict codes of conduct and rote responses. Some subjects are absolutely taboo, most notably any comment on royalty. The truth needs to be read

into their actions and the smile is a cover for their real feelings, motivations and intentions.

The most vital consideration is to work with experienced, native-born researchers in each territory who know the social codes and are adept at sensitive observation and reading the non-verbal communication signals. Once again, carefully constructed projective techniques worked-on in smaller-sized teams help to reveal the underlying truths and provide direction on the stickier questions of motivation, barriers to specific choices and possible 'unblocking' strategies.

Ethnic diversity within national borders



As Europeans we are used to the idea of regional differences but we tend to assume that the common national identity is ultimately much more important. This is not always the case in the East, where different ethnic and linguistic groups are often separately defined within the same nation and where there can be great rivalry - or even hostility- between them. In Malaysia for example, the three ethnic groups, Malays (Bumiputras), Chinese and Indians each display very different value systems and have quite different sets of expectations.

In research - unless a specific cross-cultural dynamic is the objective – the safer bet is to recruit carefully within the different ethnicities and where possible match respondents with researchers from the same ethnic background.

Trust



In officially communist China, with its turbulent and authoritarian recent history, gaining trust in certain areas can be quite difficult. For example, quasi-political subjects such as the Environment or Education need sensitive handling and reassurances that it's OK to speak one's mind. Such reticence is particularly visible amongst older respondents who retain an understandable fear of being observed and somehow 'tagged' via the research process. Similar issues are also present in Vietnam but to a lesser extent than China, because Vietnam is now an optimistic, dynamic and society with many well-educated young entrepreneurs working energetically towards a better future for themselves and their families - and the fear of official surveillance is now receding.

There can be a need in certain countries to be aware of the government agenda behind the views & comments of older respondents - and to recognise the enormity of the generational divide which makes the educated young respondent more likely to offer surprising new insights than his or her parents.

Final words on the East...

The key to research in the East lies in understanding cross-cultural variances and adapting the approach appropriately whilst maintaining a common core. This takes skill and experience from mature professionals in each country who know both western and eastern culture and fully comprehend the goals the client is trying to fulfil. Experienced, insightful local research personnel like these are quite hard to find in practice - which is why we maintain contacts like these throughout the world.

Research conversations in Asia can take longer to develop. Even in the hands of a skilled moderator it takes time to create an open-minded environment and to encourage the ideas and opinions of the individuals to surface, rather than just a collective or group-driven response. It can often be better to talk to consumers in rather smaller groups (e.g. six as opposed to the western norm of eight) and ideally for rather longer.

A final cautionary tale

A depth-interview with a senior Asian businessman was designed to probe his views on a particular brand, its competitive posture and various product development opportunities. After a 2-hour interview clear directions seemed to emerge. But as the interview was concluding he said to the interviewer in complete seriousness: ***'Of course as a traditional Chinese businessman I always consult the fortune teller before making any decisions'***.

The moral of this story is that even when you've uncovered what to Western ears may appear to be completely logical and meaningful findings, don't expect that you've necessarily uncovered the entire truth. This can take a little longer in the East!

Moog – a brief introduction

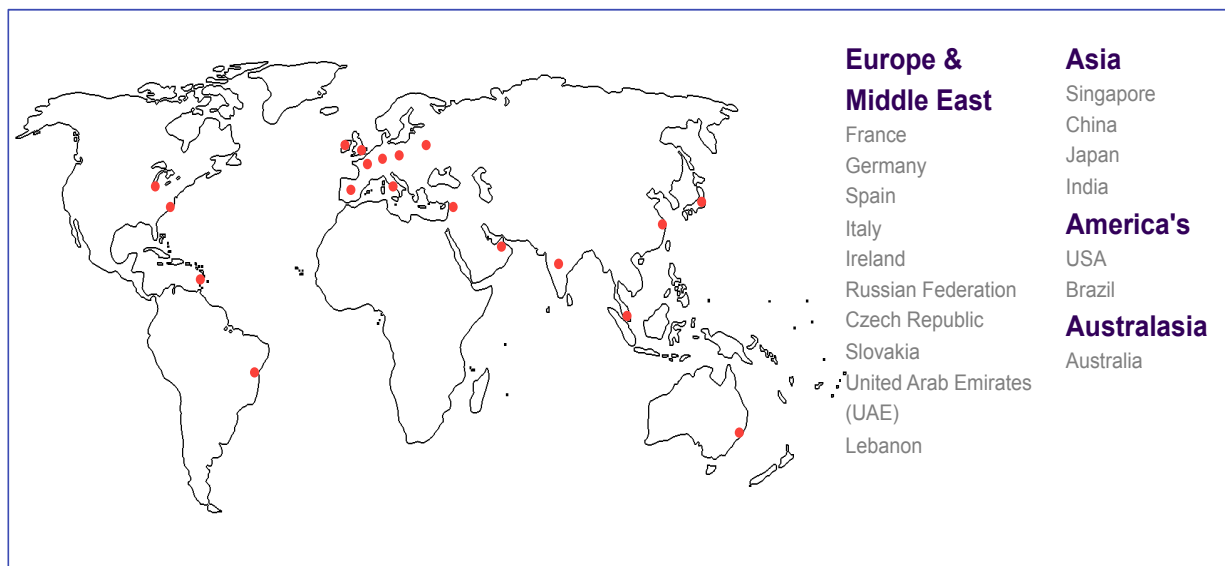
Moog Planning is a different kind of research agency, focused on **brand innovation** of all kinds. Clients use us to **solve difficult problems** and provide **strategic direction** in situations where no single, 'pre-packed' research method is going to deliver the answer, principally:

- **New proposition development & brand-stretching**
- **Brand positioning & marketing communications**
- **Pricing strategy**
- **Customer experience enhancement**

What makes us different is the ability to **fuse together in one, seamless project** the skills normally kept in separate boxes: strategic analysis and commercial nous, creative stimulus – and of course great research, whether Qualitative or Quantitative. At a time of disruptive change in so many markets these are the skills needed to 'see around the corner' and be prepared for what is coming next.

The partners in Moog have – between them – worked for major brands in almost every sector, from mainstream FMCG food & drinks to Automotive, and from Financial Services to Telecoms & Technology. We have a particular expertise also in 'intangible' brands ranging from major charities and pressure groups through to government departments and agencies.

Internationally, Moog people have run projects within the past 4 years covering every location below:



These projects include – amongst others - the re-branding of a financial corporation in the West Indies, developing a new international food concept for a firm based in the UAE and multi-country studies in sustainability & corporate responsibility for O2 in mobile telecoms and leading logistics firm, UPS.

With regard to the Far East in particular, Moog partner Andy Lock has spent much of his career working in the region and has an intimate personal knowledge of all the major markets including China, Korea, Thailand, Vietnam, India, Malaysia, Japan, Singapore, Sri Lanka and Australia. As a result, Moog is able to work with mature and highly experienced research partners in all these markets and can deliver deep customer insight on an international scale.