

EAST MEETS WEST

BRINGING TWO PERSPECTIVES TOGETHER

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INTRODUCTION

Asia is often perceived as the most 'exciting' region for conducting market research – at least by 'Westerners'¹ But what actually makes it so exciting? What is it that makes the difference compared to research in other parts of the world? Firstly, the sheer potential of Asian markets is surely reason enough for excitement on behalf of marketing and market research teams. Secondly, what excites Western clients and research institutes alike about market research in Asia is that it retains the slight touch of being 'exotic', 'challenging' or even 'problematic'. For no other region in the world do Westerners expect cultural influences to be as large as for Asia. It is when preparing research to be conducted in Asia that we as researchers with a Western background find ourselves most often confronted with questions like: "Which methodologies will or will not work?", "What social and cultural aspects need to be taken into consideration?", "How established is online research?", "Can you really conduct normal in-home interviews in China as you would in Germany?" and even up to the question: "Can you really carry out such a research at all?"

There is a vast amount of literature dealing with these concerns: it addresses the constant wish to better understand Asian cultures and offers advice on how to best manage differences between Asian and Western cultures in business relations. However, such literature bears two substantial disadvantages for us as market researchers: often written by Westerners, this kind of literature tends to show a one-sided Western perspective, the perspective of the Asian side is rarely taken into consideration. Furthermore, such intercultural guidebooks

commonly address business relations in general and not market research in particular.

In order to answer questions from clients and colleagues and to offer deeper insights into what they have to consider when doing market research in Asia, we feel that we need to refer to more specific details. Still, even reporting from our research experiences in Western regions in comparison to those made in Asian countries would be too limited and one-sided as well. Therefore, we will in the following integrate two perspectives: not only our own but also that of our Asian partners as the experts for market research in Asia. In order to do so, we have chosen a miniature Delphi-approach carried out in October 2008 (step 1) and January 2009 (step 2). In step 1 we asked our two main partners in Asia – i.e. in China and Indonesia – with rather broad questions to give us initial feedback on cultural differences they perceive between 'East' and 'West' in market research. Based on the results of this first round of questions and answers, we generated hypotheses as well as further, more detailed questions. This new set of refined questions and hypotheses was then – in step 2 – distributed again, this time to a larger pool of our partners across Asia: China, India, Indonesia, Japan, Korea, Malaysia and the Philippines. In this article we bring together the collected Asian perspectives with our own experiences. Additionally, we refer to learnings from cross-cultural psychology to provide further details and explanations. By thus combining different perspectives and approaches we address key questions for research agencies and clients, best summed up as: To what extent do assumed differences between 'East' and 'West' matter in market research? As this is obviously a 'big'

question, we will focus on two specific areas: project management and methodology.

Before plunging into the topic, the following question strongly requires to be addressed: *‘What do we actually refer to when we speak of ‘Asia’ in market research?’*. Raising this question in our Delphi survey, our experiences collected during much research in Asia were confirmed by all partners from seven different Asian countries in South, Southeast and East Asia: Asia is not a homogenous market. The misconception among (some) Western clients that findings from one Asian country can be transferred to another needs to be disbanded.

“They are totally different and what works in one market is not at all guaranteed to work in another.”
(Quote from Malaysian expert)

Solely looking at what is commonly called ‘Southeast Asia’, this region includes indeed predominantly Muslim countries (Indonesia and Malaysia), but also the Christian Catholic Philippines and a number of Buddhist countries such as Thailand (which is furthermore the only Southeast Asian country which was never colonised). Of the East Asian countries China, Korea and Japan, which have all developed under the strong influence of Confucianism and Daoism, China is still communist-run while Japan stands out for many reasons, an aspect that will also further elaborated on in this article.

“Chinese and Japanese clients are totally different – to the extent that referring to them both as Asian leads to no insight at all.” (Quote from Chinese expert)

Finally, the ‘giants’ of the region, China and India, both consist of various different ethnic groups that adhere to different religions, speak different languages and are as consumers guided by different motivations and considerations.

Against the backdrop of all the diversity within Asia, with regard to ‘Market Research Conducted in Asia’, we have still found some striking ‘Asian’ (and ‘Western’) similarities. In the following we will stress both similarities and differences found in order to highlight interesting country-specific nuances.

PROJECT MANAGEMENT

Cooperation between ‘East’ and ‘West’ is surprisingly easy!

Our experience is that when conducting research in Asia for the first time, Western clients are often surprised about ‘how easy’ this actually is. With the interviewed Asian research institutes, the assessment of the cooperation with Western clients is strikingly similar: the project management and dealing with Western clients are perceived as surprisingly smooth. The mentioned ‘surprise’ on behalf of both sides already indicates that when cooperating for the first time, Asians and Westerners may go through a two-step process as can be exemplified by a quote from the interviewed Indian expert:

“There is a fair bit of apprehension on both sides in the beginning. This is in large part related to operational and logistical issues where Western and Indian attitudes are quite different. However, there is a dramatic shift once the research actually begins and clients experience the skill levels of the local researchers as well as the cultural differences that explain the operational challenges. From then on it is a surprisingly smooth ride.”

In Asian research agencies that work with Western staff, this two-step process can be further smoothed. Here, the main benefits are seen to be psychological:

“Western clients may feel they are in better hands when dealing with another Westerner, even though we have some extremely capable and experienced local researchers.”
(Quote from Malaysian partner)

Our hypothesis from the first Delphi round – namely that Westerners’ excitement in the face of an Asian research project and their expectation of going through a completely different (research) experience lead to a comparatively higher openness and greater flexibility on their part – was verified in the second round of the survey. The interviewed Asian experts expressed that commonly Western clients – more than Asian clients – show understanding when things do not run 100% smooth (e.g. late arrivals) or when adaptations with regard to recruitment need to be made due to cultural reasons. Some of the interviewed research experts even

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assessed the cooperation with Western clients to be easier than the cooperation with clients from other Asian countries. ‘Fellow’ Asians tend to focus on the closeness of their respective cultures which in turn leads to a lack of openness and flexibility when it comes to accepting local specificities. In this respect, Singaporeans might expect that what can be done in Singapore or Malaysia can also be done in Indonesia. However, even though project management between Asians and Westerners is overall assessed as surprisingly smooth, there still are some differences between cultures and local specificities that might prove challenging or should simply be kept in mind.

Agreeing on timings can be difficult

Challenges concerning project management with Western clients are often seen with regard to timing issues. The time needed for the completion of Asian fieldwork may be longer than Western clients are used to – and willing to invest. Running two groups on a normal day can prove to be very challenging, if not impossible in some Asian countries: the longer duration of group discussions (due to a more extensive warm-up phase), the respecting of prayer times (e.g. Malaysia, Indonesia), long distances to commute from the city back home and respondents’ reluctance / unwillingness to take leave from work in order to attend afternoon sessions are some of the factors that prevent a more ‘tight’ time schedule. Similarly, more time needs to be allocated for in-home-interviews: in face of heavy traffic, partly insufficient infrastructure and other impeding factors (e.g. flooded streets during the rainy season), conducting more than two to maximum three interviews per day is simply not feasible. The resulting longer duration of fieldwork or shifting of groups to the weekend where two groups can be held on a Saturday or Sunday is sometimes difficult to accept for Western clients, especially if they have to take these timing issues into consideration within a multi-country study.

Different communication cultures as the main challenge

The most encompassing differences between ‘East’ and ‘West’ become apparent when looking at the different communication cultures – an observation expressed

equally by both sides. When reviewing the input we received on communication specifics, we found that the cultural facet of ‘collectivism’ was linked to various of the topics discussed. Research in cross-cultural psychology starting from Hofstede (1983) has frequently shown that Asians score higher on scales describing collectivist cultures than Westerners do. Still, more recent research suggests that a collectivist vs. individualist scale might be too imprecise to represent finer cultural differences adequately (e.g. Yuki, 2003). This is quite self-evident considering that the ‘national’ character of collectivism is influenced to a varying degree by more localized values and ethics e.g. Confucian ethics. However, the basic take-out remains stable in its essence: Asians show a higher tendency in defining themselves in relation to others and with regard to their role and actions within a given group. (See figure 1.)

Being embedded in a team and company offering market research services strongly favours a behaviour aimed at making everything as smooth as possible for the client. As our Chinese partner stated:

“If you are in a position to serve someone else, you are expected to act appropriately, and moreover, you don’t mind that expectation.”

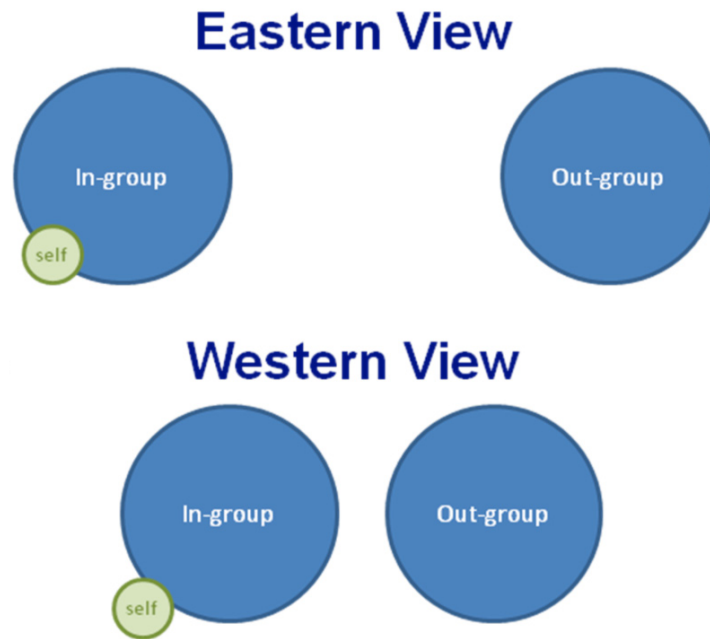
Or, as our Philippine partner stated:

“If you are the (service) provider you must do everything to take care of the client.”

Westerners are often pleasantly surprised by the kind of service they receive in Asian countries – as many of our experts stated. However, service orientation rooted in collectivism as well as Confucian ethics also bears some challenges in communication:

a) The service provided is partly rather based on hospitality and a sense of hierarchy and reflects less the Western sense of commission-based services and consultancy. This is not always properly recognized by Westerners, e.g. leading to an offhand expectation of a high degree of individual initiative – while the local staff rather aims on fulfilling concrete requests and known expectations.

FIGURE 1
EASTERN AND WESTERN VIEWS OF THE RELATIONS BETWEEN SELF, IN-GROUP AND OUT-GROUP



Source: Kessel, 2000

b) Although open communication about challenges and problems seems to be widely established, still some of our experts state that their staff might be initially inclined to deal with problems and questions without ‘bothering’ the client. It is of high personal importance to them to be perceived as good service providers, meaning that the client should experience a perfect project flow without any hassle for himself. This can lead to the silent adjustment of recruitment criteria, the adaptation of concept translations and so on – all maybe necessary and legitimate to meet local specifics, however problematic if the researcher conducting a global research is not informed about these changes. Therefore it is essential to clarify that problems and questions need to be addressed openly – instead of just assuming that this will be the case anyway. In this context it is also helpful to keep in mind what our Philippine partner stated:

“When we say we have a bit of a problem we actually have a huge problem.”

c) Mistakes may become another challenge. While mistakes may always happen and are generally hard to confess no matter for whom, admitting a mistake in Asian cultures is even harder. Due to the high relevance of personal relationships and one’s role and position in a group, mistakes by a service provider seem to be very easily interpreted as not living up to the demands one’s role implies: they become a personal failure instead of something that can happen and has to be dealt with.

“Mistakes take on a personal overtone and suggest that the researcher is holding back...” (Quote from an Indian expert)

Against this background it becomes clear how conducive it is when Western clients deal with mistakes in a professional way. Especially in Asia, looking for solutions instead of focusing on personal failure will be very much appreciated and will help strengthen the basis of future open communication.

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d) As a last example of differences in communication we would like to discuss the topic of feedback. Feedback culture differs a lot between Westerners and Asians also due to different overall aims in communication which are reflected in figure 2.

Overall, Asians seem to provide less feedback than Westerners – be it positive or negative feedback. As our Korean partner states:

“(Asians) tend to think that negative feedback is kind of rude and positive feedback is a kind of flattery.”

For negative feedback, again, this is strongly connected to it being easily interpreted as a kind of personal failure. It is therefore essential for Westerners to provide feedback in a very constructive way – allowing the Asian partner ‘to keep face’. It should be very concrete, solution-oriented and include positive aspects as well. Helpful in this context is the Western tendency of providing spontaneous positive feedback and gratitude. Asians highly appreciate this Western trait which is less commonly seen in Asian clients. However, it became very clear that Japanese differ in this respect from other Asian clients. They tend to provide very extensive functional feedback on moderation focusing on which questions were asked, which ones were missed. In addition, Japanese clients may express their respect and gratitude e.g. by applauding at the end of a project. As we will see, this is not the only aspect in which Japanese differ from other Asian countries.

Country specifics: Japan as a special case (from a Western and an Asian perspective)

One very striking result of our Delphi survey are the particularities market researchers – no matter whether of Western or Asian origin – experience when working with Japanese clients or research agencies. The conclusion is very clear and straight-forward: Japan is different from all the rest of Asia (as well as from the West and the rest of the world for that matter)! Whether conducting a research for Japanese clients outside of Japan or doing market research in Japan – it is always a unique experience. Various factors can be named and the discussion of these could fill a whole research paper of its own which is why we will focus on some of the most often mentioned aspects in our survey.

The experiences of all interviewed Asian researchers as well as our own show that Japanese partners and clients expect and appreciate a very detailed and well-structured project set-up. This includes schedules of meals during fieldwork, detailed information on the project team and the exact name of the simultaneous translator. As this degree of detail is not generally demanded, it may come as a surprise when dealing with Japanese clients and agencies for the first time. The clear advantage which such detailed planning offers is a good outlook on the project flow for all involved (and especially on the Japanese side, a large number of people *are* involved.) As the interviewed Japanese research experts explained, detailed and well structured project schedules are required in order for the group to

FIGURE 2
AIMS OF COMMUNICATION DIFFER BETWEEN WESTERN AND ASIAN COUNTRIES



This is also related to differences in feedback culture.
Source: Kessel, 2000

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work smoothly. Being punctual and adhering to laid-out time schedules shows the individual's commitment to the group and is ultimately key to maintaining social harmony. However, the downside of the wish for detailed structure from an early point on is that integrating changes that become necessary along the way may prove to be challenging, if not impossible. In fact, as was further explained by the interviewed Japanese colleagues, the frequent last-minute changes requested by Western and other Asian clients cause an uncomfortable sense of uncertainty on the Japanese end. As Hofstede has shown, Japanese score high on the scale of uncertainty avoidance, meaning that:

"(Japanese) have difficulties absorbing and adjusting to changing scenarios without enough advance knowledge of what these changes entail." (Quote from Japanese expert)

When it comes to doing market research in Japan, Westerners and other Asians can expect to go through such a different experience that Japanese market researchers even speak of 'culture shock' (JMI, 2008). *Firstly*, a comparatively large amount of time is required for the set-up of a project: in face of a relatively small Japanese market research industry, the booking of venues, moderators and translators needs to be done well in advance. Additionally, for a good translation of topic guides that hit on the intended objectives, several rounds of checking and back translation should be planned. *Secondly*, getting at the heart of what Japanese respondents actually think and feel remains one of the major challenges when doing market research in Japan, more than in other Asian countries. Due to the innate Japanese wish to preserve social harmony, respondents in groups are reluctant to share their thoughts until they are sure they are in line with the rest of the group. If their opinions are out of line with those of the group, they may even answer contrary to their own feelings in order to save face. Hidden meanings in respondents' answers (reading between the lines) and the important non-verbal communication easily get lost in simultaneous translation, thus leaving the true opinions of respondents disguised. Here, working with very skilled moderators and highly sensitive translators is essential. Additionally helpful is the

individual assessment of opinions prior to the discussion in the group. *Thirdly*, Japan also stands out as one of the most expensive countries in the world which also shows in research costs.

Asked about their perception of the cooperation with Western clients, the Japanese research experts interviewed expressed two contrasting observations. While on the one hand Western clients come with an open mind and high level of curiosity, asking many questions of what the cultural differences may mean for their research, they can at other times also be found puzzled by some Japanese business practices, showing only limited understanding of why things cannot be dealt with in the way they are used to.

Overall, cooperation with Japanese can be very demanding simply due to the often unexpected cultural specifics, however it is often also very rewarding as the Indonesian experts put it:

"The stress factor is very high when working with Japanese as they demand a lot. However, we learn quite a lot as well. (...) Standing ovations after a job well done is common from them, we appreciate this very much."

We can only agree with this sentence, adding that doing research in Japan remains a unique and fascinating experience.

RESEARCH METHODOLOGY

Concept testing

In the area of concept testing we see several cultural tendencies that may lead to a distinctively Asian processing and assessment of concept content. In classic concept tests, we often found that it seems quite difficult for Asian respondents to discuss specific concept details independently from their assessment of the overall concept. This tendency is especially strong if their concept assessment is based on emotional concept elements. Findings from cross-cultural psychology explain this observation to some extent. Smith et al (2006) highlight that Asians think rather holistically. In addition, as already mentioned, Asians tend to define themselves in terms of their relations to others.

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This is linked to them tending to focus on emotional connotations more than on functional content (e.g. Ishii, Reyes and Kitayama, 2003) as the emotional connotation is of higher relevance when managing relations. Let us, for example, consider a concept which is very appealing to respondents as it emotionally anchors a product within the highly relevant family context: it may become almost impossible to discuss and compare functional elements of this overall appealing concept with functional elements described in other (emotionally less appealing) concepts. Emotion and family context simply overshadow the functional content.

The experiences of the Asian research experts interviewed point into the same direction when it comes to the particularities of concept testing in Asian markets. Especially the research experts from the Philippines expressed how the 'deconstruction' of concepts is contradictory to their innate holistic approach:

"Western clients can be very detailed in trying to find out respondents' perceptions on particular concept details, to the point that it feels quite odd for us or the respondent to reflect so intensely on a part separated from the whole. (...) Deconstruction is not a native habit in our culture. We are more comfortable perceiving on a more holistic, impressionistic and even emotional level." (Quote from Filipino expert)

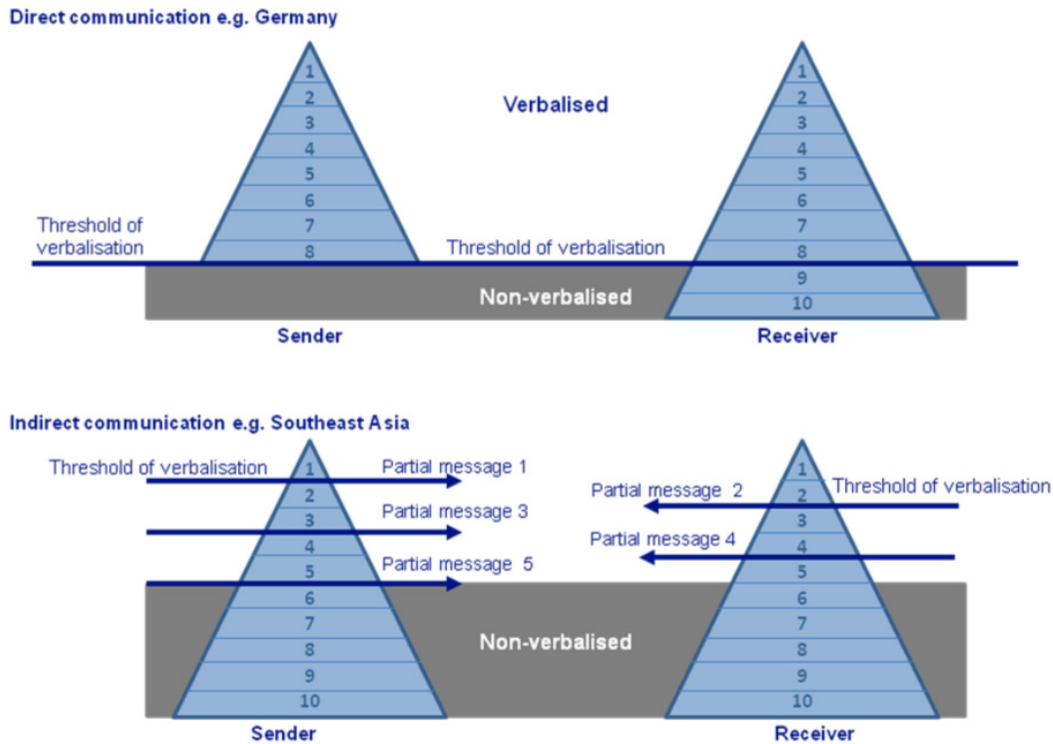
To counterbalance this tendency, the methodological approach of showing not only complete text concepts but also their breakdown into single elements (insight, benefit, RTB and tagline) can help in gaining the insights needed. Furthermore, some of the interviewed Korean and Japanese research experts mentioned the general unfamiliarity of Asian respondents, esp. older ones, to openly express their individual opinions and feelings for reasons already mentioned above (preserving social harmony in the group).

"Compared to western standard, we may sound quiet when it comes to expressing ourselves on emotional concepts, because until certain generations, Japanese were not really encouraged to express themselves to others while they were in schools." (Quote from a Japanese partner)

Again, this is also linked to general differences in communication. (See figure 3.)

A fruitful concept discussion thus requires very detailed questions, lots of probings and a well structured discussion flow. However, the discussed peculiarities with regard to concept testing are not found everywhere in Asia, as for example the interviewed Indian expert stated. In India, concept testing is no more and no less difficult than in Western countries. Another, very practical and often underestimated issue is concept translation. Asian languages and especially Japanese are highly contextual languages (e.g. Nisbett, 2004): words can have multiple meanings and may sometimes only be understood in a context of sentences. In combination with a highly complex system of characters in countries like China or Japan this may lead to great challenges when translating concepts. We often found that the understanding of a translated concept varied dramatically between different people, be it the local clients, local researchers or respondents. In addition, original concepts are often based on cultural assumptions or use play on words which take advantage of the language they are written in without necessarily conveying a 'deeper' meaning. Examples for this could be that a concept is based on a particular sitcom that is well known in the West but unknown in Asia or that it works with puns around wording which simply do not exist in the local language. When such concepts get translated into rather mediocre local versions, they may end up testing poorly and clients are left puzzled about why their smart concepts were not well received by respondents. This problem is further reinforced by the fact that translations are often left to the last minute and simply assigned to the research agencies rather than to professional bi-lingual translators. In face of the difficulty of finding the right words that convey the intended meaning in all its nuances or applying the correct technical terms it is understandable why Asian research partners are reluctant to take on this responsibility. It is therefore recommendable to strive for several feedback loops when translating concepts, thereby bringing together the input from the local research agencies, translators and clients.

FIGURE 3
MORE INDIRECT COMMUNICATION IN ASIA ALSO HAS ITS EFFECTS ON CONCEPT TESTING



Source: Kessel, 2000

Consumer diaries

Creative consumer diaries to be completed at home are unanimously referred to as one of the most difficult parts of qualitative research by our interviewed Asian experts. Commonly, Asian consumers are not enthusiastic about filling in such diaries. This holds true especially for high-income and high-status respondents, older respondents and working males. In contrast, diaries overall work better with younger target groups, students, kids and partly with housewives. The underlying reason for the general difficulty of working with consumer diaries is the fact that in Asia – and here we are speaking of Asia as a whole – there is no strong culture of writing for pleasure and of keeping a diary. Asians tend to be more verbal rather than written:

“People have a lot to say in groups – they can be extremely garrulous – but when asked to do a written

task they dry up. (...) They do not ‘think’ in written language.” (Quote from Indian expert)

Furthermore, respondents tend to dismiss the completion of a diary as a kind of game for children and thus not as something worth spending their time and effort on. Insufficient monetary incentives and the often complex and lengthy character of the diaries only further aggravate this dilemma. All this leads to extra work for the local research agency as the diary-phase needs to be accompanied and supervised very closely. Usually, this involves a lot of time-intensive personal contact with the respondents and multiple visits to the respondents’ homes. Besides the mere guidance and offering of support, this personal contact to the recruiter or the researcher, above all, leads to a higher commitment on behalf of the respondents to fill out the diary in a satisfying way, as was stressed by various interviewed experts.

In-home ethnography

The role of in-home ethnography – spontaneously referred to by the interviewed Asian research experts – is assessed somewhat differently between countries. In India, ethnography seems to be quite easy due to Indians' great hospitality and few personal boundaries, resulting in their ease at welcoming strangers in their homes. In contrast, in China and Malaysia respondents are overall more hesitant to greet strangers in their homes. Here, social gatherings are commonly conducted in '3rd spaces' such as restaurants or bars rather than at home where living conditions can be quite cramped. Additionally, people may feel their home is not 'representative enough' to welcome guests, especially if foreign clients are among them. In China, respondents are furthermore particularly sensitive when it comes to showing personal rooms (e.g. bathroom and bedroom) and on top of that, having pictures or videos taken in their home. They require to be notified in advance of which places in the home shall be visited and photographed. Higher incentives will also need to be calculated for the carrying out of in-home ethnography in these countries. In addition, reducing in-home visits to a minimum of (local) attendees may be advisable to get a realist impression of the living environment. So overall, in-home ethnography can be done in Asia, however this valuable methodology needs to be sensitively adapted to local specificities.

Online research

It may come as a surprise to Western clients that online methodologies can be problematic in Asia, as Asian experts have stated. While in Western countries online methodologies are still developing but have nevertheless become a standard by now, they are used less frequently and in a less encompassing way in Asia. Here, these otherwise time and cost efficient methodologies can actually turn into the opposite when trying to enforce them and finding out that Asian target groups are simply not responding to them. According to our Asian interviewees, this observation is in part again due to the lack of initiative and self-supervision seen in Asian respondents when it comes to completing tasks alone at home. The need for supervision by the recruiter or researcher plus the need for high incentives to motivate

respondents in the first place lead to higher costs than clients expect and are common for online research in the West. It must further be pointed out that internet penetration differs highly across the region. Broadband penetration is very high in Japan, Korea, Taiwan and in Singapore. In fact, Japan also stands apart from the rest of Asia in this respect as online research here is very wide spread, accounting for 28% of overall market research spending, making it second worldwide after Australia. In India, China and Southeast Asian countries, however, internet access is overall still limited and very differently distributed: it tends to be high in urban areas but remains very low in rural areas. The fact that the internet is very often accessed from cyber cafés has an additional deterring effect on consumers' ability and willingness to navigate online surveys. Nevertheless, the majority of interviewed Asian research experts stated that they expect online research to gain in importance in the future – even if it may still take some time, shorter or longer depending on the respective country.

CONCLUSIONS

Against the background of our own research experiences in various Asian countries and the feedback of nine partners from seven different Asian countries in South, Southeast and East Asia, we come to the conclusion that the differences between 'East' and 'West' – though surely existent – have less impact on research projects than one may imagine. Often it is sufficient for Westerners to be open minded with regard to cultural specifics, sensitive to nuances in communication and willing to slightly adapt certain methodologies (e.g. include more supervision to tasks which require a lot of personal responsibility from the respondents). The differences which often show a higher relevance in the research business are the distinctive differences among Asian countries as the example of Japan has shown. Here, we can surely speak of market research 'made in Japan'. So taking the special case of Japan aside, can we still generalize and speak of 'research in Asia'? We definitely say we can and we should! However, whether and how Asia specifics affect a research project needs to be considered every time anew depending on the country and specific project

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objectives. Which leads to the heart of research in Asia: it is always exciting!

Footnotes

1. Here it shall be noted that, even though the terminology 'Asia' and 'the West' is problematic and imprecise when referring to these large and also culturally, ethnically and linguistically diverse areas, the use of this terminology could not be avoided.

Resources

Primary Sources

Expert interviews with Chinese, Indian, Indonesian, Japanese, Filipino, Korean and Malaysian research directors, project managers and moderators working for international clients.

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