



West meets East: Market Research in Asia

By Susanne Wieners-Schlupkothen and Patricia Blau

Asia is often perceived as the most exciting region for conducting market research. The sheer potential of Asian markets is reason enough for excitement on behalf of marketing teams. What excites Western clients and research institutes alike about market research in Asia is its exotic touch. For no other region in the world do Westerners expect cultural influences to be as big as they do for Asia. But what does it mean for cross-cultural market research? To what extent do assumed differences between East and West matter in market research?

In order to shed light on this, we will look at market research in Asia from our own perspective as Western researchers with a long-standing experience in doing market research in Asia as well as from the perspective of our Asian partners who are the genuine experts for market research in Asia. The Asian perspective is based on a two-phase survey GIM conducted in October 2008 and January 2009 among its research partners in China, India, Indonesia, Japan, Korea, Malaysia and the Philippines. Our survey focused on cultural differences Asians perceive when collaborating with Western researchers and clients. Additionally, we refer to learnings from cross-cultural psychology to provide further details and explanations.

Initial Apprehension followed by Surprise on both Sides

When conducting research in Asia for the first time, Western clients are often surprised about 'how easy' this actually is. Among the interviewed Asian research institutes, the assessment of the cooperation with Western clients is strikingly similar. When cooperating for the first time, Asians and Westerners commonly may go through a 2-step process as can be exemplified by a quote from an Indian research expert: *"There's 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 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."*

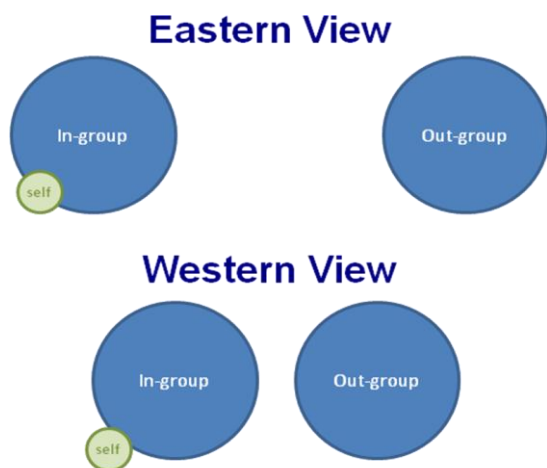
Interestingly, Westerners' excitement in face of an Asian research project and their expectation of going through a completely different (research) experience lead to a comparatively higher openness and greater flexibility on their part. The interviewed Asian experts expressed that commonly Western clients – 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 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 may 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 generally assessed as surprisingly smooth, cultural differences should not be underestimated.

Timings

One of the big challenges concerning project management with Western clients are timing issues. Fieldwork in Asia often takes more time than Western clients are used to. Running two groups on a normal day can prove to be tricky in some Asian countries: Longer duration of group discussions (due to a more extensive warm-up phase), the need for prayer times (e.g. Malaysia, Indonesia) and long distances to commute within the city and from the city back home are some of the factors that prevent a tight time schedule. Similarly, more time is needed for in-home-interviews: Due to heavy traffic, insufficient infrastructure and other impeding factors (e.g. flooded streets during the rainy season), conducting more than two or three interviews per day is often not feasible.

Different Communication Cultures

The most encompassing differences between East and West are seen in the two different communication cultures. Research in cross-cultural psychology starting with Hofstede (1983) has



shown that Asians score higher on scales describing collectivist cultures than Westerners do. This manifests itself in the fact that Asians show a higher tendency in defining themselves in relation to others and with regard to their role and actions within a given group.

Figure 1: Eastern and Western views of the relations between self in-group and out-group. (Source: Kessel, 2000)

Working in a company offering market research services strongly favours a behaviour aimed at making everything as smooth as possible for the client. Like our Chinese partner stated: *“If you are in a position to serve someone else, you are expected to act accordingly, and moreover, you don’t mind that expectation.”* Or, like our Philippine partner expressed: *“If you are the (service) provider you must do everything to take care of the client.”*

Westerners are often surprised by the strong service orientation in Asian countries. However, the service provided is often rather based on hospitality and a sense of hierarchy; it reflects less the Western sense of commission-based services and consultancy. This is not always properly recognized by Western clients who may expect a high degree of individual initiative – while the local staff rather aims at fulfilling concrete requests.

Although open communication about questions and problems that arise during a project is widely established in Asia, Asian research partners still prefer to deal with problems without bothering the client. They want to be perceived as a good service provider, assuring a perfect project flow without any hassle for their clients. This can lead to silent adjustments of recruitment criteria or adaptations of concept translations. This all may be necessary and legitimate to meet local specifics, however, the (Western) researcher conducting a global research wants to be informed about these changes. It is therefore essential to clarify that problems and questions need to be addressed openly - instead of just assuming that this will be the case anyway. 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.”*



Figure 2: Aims of communication differ between Western and Asian countries. (Source:Kessel,2000)

Country specifics: Japan as a Special Case

One very striking result of the survey conducted among Asian research experts are the particularities not only Western but also Asian market researchers refer to when working with Japanese clients or Japanese research agencies. The conclusion is very clear and straightforward: Japan appears to be different from all the rest of Asia! Japanese partners and clients expect a highly detailed and well-structured project set-up. This includes schedules of meals during fieldwork, comprehensive information regarding the project team and the exact name of the simultaneous translator, and so on. Since information in this detail is not common, especially at an

early stage, it may come as a surprise when dealing with Japanese clients and agencies for the first time. On the one hand the advantage of such accurate planning is a good outlook on the project flow for all involved. For Japanese this is essential for the group to work smoothly. For them adhering to laid-out time schedules shows the individual's commitment to the group and is the key to maintaining social harmony. On the other hand, the wish for such detailed schedules from an early point makes changes and adjustments along the way difficult. Thus last-minute changes requested by Western and other Asian clients cause an uncomfortable sense of uncertainty on the Japanese end. As Hofstede pointed out, Japanese score high on the scale of uncertainty avoidance, a fact also expressed by a Japanese research expert: *"Japanese have difficulties absorbing and adjusting to changing scenarios without enough advance knowledge of what these changes entail."*

Apart from organizational challenges, anybody who has done market research in Japan knows how difficult it is to get at the heart of what Japanese respondents really think and feel – even more so than in other Asian countries. Due to the innate Japanese wish to preserve social harmony, respondents in focus groups are reluctant to share their thoughts until they are sure that 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 and important the 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 both capable of reading between the lines is highly essential. It is also helpful to individually assess of opinions prior to the discussion in the group.

Concept Testing in Asia

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 Asian respondents appear to have difficulties in discussing specific concept details independently from their assessment of the overall concept. This tendency is especially strong if their concept assessment is based on emotional elements. Let us for example consider one 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 concept with functional elements described in other less appealing concepts. Emotion and the family context simply outplay the functional content. The experiences of the interviewed Asian research experts 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 emotional level.”

Furthermore, Korean and Japanese research experts mentioned the general unfamiliarity of Asian respondents, esp. older ones, to openly express their individual opinions and feelings:

”Compared to Western standard, we may sound quiet when it comes to expressing ourselves on emotional concepts because until certain generations, Koreans were not really encouraged to express themselves to others.” Again, this is linked to the issue of differences in communication.

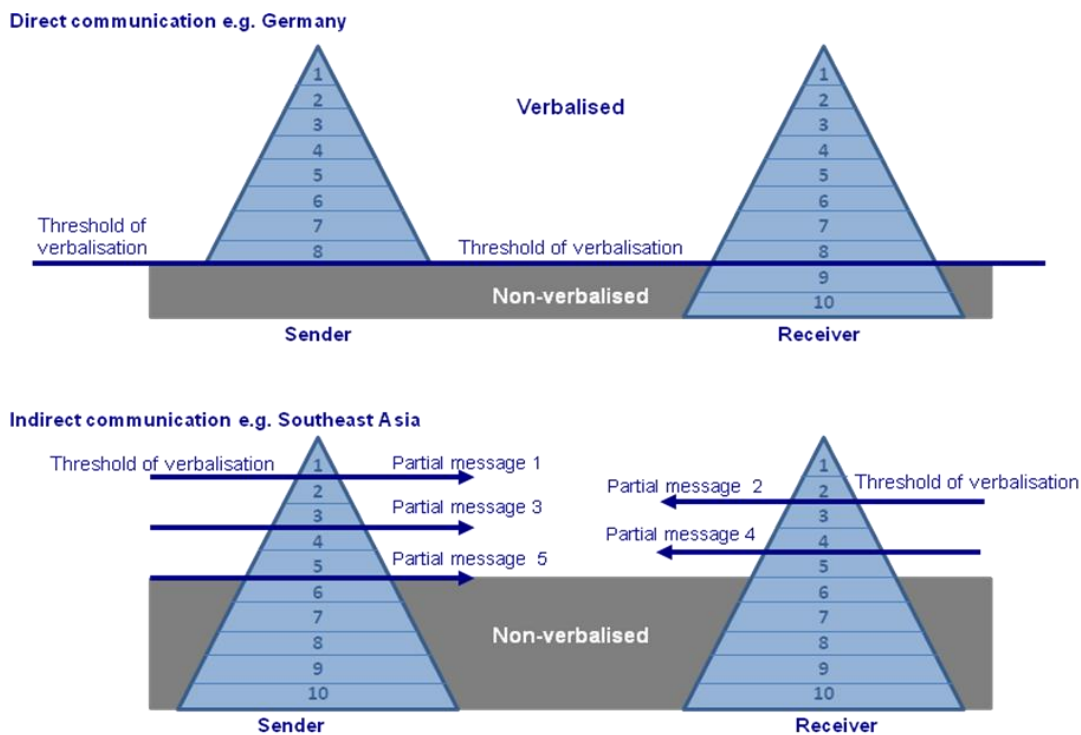


Figure 3: More indirect communication in Asia also has its effects on concept testing. (Source: Kessel, 2000).

Successful concept testing 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.

Translations of Concepts into Asian Languages

A very practical but often underestimated issue is concept translation. Asian languages are highly contextual languages (e.g. Nisbett, 2004): Words often have multiple meanings and are sometimes only understood in a context of sentences. In combination with a highly complex system of characters in countries like China or Japan this leads to great challenges when translating concepts. The understanding of a translated concept varies dramatically between different people, be it local clients, local researchers or respondents. In addition, original concepts are often based

on cultural assumptions or use language-specific word plays without necessarily having a deeper meaning. When such concepts are translated they may end up testing poorly and leave clients puzzled. The fact that translations are often left to the last minute and assigned to the research agencies rather than to professional bi-lingual translators reinforces this problem. Because of the difficulty of translating the intended meaning in all its nuances or using the correct technical terms it is understandable why Asian research partners are reluctant to take on this responsibility. It is thus recommendable to strive for several feedback loops, bringing together the input from local research agencies, translators and clients.

In-home Ethnography

In-home ethnography can be done in Asia but it needs to be sensitively adapted to local specificities. In India, for example, ethnography is quite easy: Indians show great hospitality and have few personal boundaries and are thus very open to welcome strangers in their homes. In contrast, Chinese and Malaysian respondents are more hesitant to greet strangers in their homes. In these countries, social gatherings are commonly conducted in third spaces such as restaurants or bars rather than at home where living conditions can be quite cramped. In China, respondents are furthermore particularly sensitive when it comes to showing personal rooms (e.g. bathroom, bedroom) and on top of that, having pictures or videos taken in their home. They want to know in advance which places in their home shall be visited and photographed. Higher incentives need to be calculated for in-home ethnography in these countries. Last but not least, reducing the number of in-home attendees may be advisable to get a realist impression of the living environment.

Online Research

It may surprise Western clients that online methodologies can be difficult in Asia. Online research known as time and cost-efficient can actually turn into the opposite when trying to enforce it in Asian countries and finding out that Asian target groups are simply not responding. One reason is surely internet penetration which differs greatly across the region: Though very high in Japan, Korea, Taiwan and Singapore, it is rather low in India, China and Southeast Asia, where it is furthermore unevenly distributed (high in urban areas, 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, a majority of the interviewed Asian research experts stated that they expect online research to gain importance in the future – even if it may still take some time, shorter or longer depending on the respective country.

Cooperation between East and West: surprisingly easy and always rewarding

Differences between 'East' and 'West' – though surely existent – have less impact on market research projects than many of us imagine. Whether and how Asia specifics affect a research project needs to be considered every time anew depending on the country and the specific project objectives. 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. The outcome will be an exciting and rewarding research experience!

Abstract

Westerners often wonder: what is typically Asian? With a multitude of business and cultural experiences to be made in Asia, it is hard to get an overview of aspects that 'typically' influence market research. With their paper Patricia Blau and Susanne Wieners-Schlupkothen shed light on this topic by combining their 'Western' perspective with experiences of their Asian research partners as well as findings from cultural studies. Thus they 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?

Literature

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Director of Consumer Health Research at GIM, psychologist and market researcher with focus on international projects. Patricia aims to embed research findings within a wider cultural perspective. Her special interest lies in methodologies which funnel the multiple facets of consumers' personalities, logics and lifestyles into tangible profiles and (global) concepts.



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