

Globalization and trends in international marketing research in Asia

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Abstract

Several factors account for globalization trends including the mass liberalization of markets, the impact of technology, and the rapidly changing methods of communication and distribution worldwide. Foreign markets are becoming increasingly important to multinational companies, and this has led to a shift in the organization and philosophy of the international marketing research companies. The benefits of an international approach to research buying include better control and coordination of the research in many countries, comparability of the research findings, and better understanding of the marketing functions on a transnational basis. Both clients and research agencies recognize that it is far more important to possess a holistic understanding of the total operating environment (including political and economic issues) and have better appreciation of the competitors' plans and activities than conventional marketing research data. If international marketing research can adhere to the clients' needs, it will continue to be relevant and will prosper in the new millennium. © 2002 Elsevier Science Inc. All rights reserved.

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1. Introduction

The past two decades have seen the fast globalization of business in the world, particularly in the Asia Pacific region, with the booming of the Asian economies such as Japan, South Korea, Taiwan, and Singapore. Recently, the economic crises have hit home and affected the growth of these economies, as well as the lesser-known economies of Thailand, Malaysia, and Indonesia. Globalization and recession, though happening sequentially and are unrelated to each other, have far-reaching and important effects on marketing research companies and their activities in Asia. This article will examine some of these implications and consequences, including a review of marketing research activities in Asia, an overview of the globalization trend, and the recent recession in Asia.

2. A review of marketing research activities in Asia

Many multinational companies in Asia carried out ad hoc marketing research, the most prominent ones being Citibank (for many of its products including current and saving

accounts, private banking, and revolving credit lines), DHL, Motorola, and Fuji Xerox. Fuji Xerox, for example, conducted research in which purchasers of its photocopiers were surveyed within 3 months after installation of the machines. The company regularly conduct at least one other research covering users of competitors' brands such as Canon, Panasonic, and Ricoh. Motorola administered a number of new product tests for its pagers and mobile phones, and process periodic surveys of its distributors and retailers. Telecommunications infrastructure companies like Singapore Telecoms, Mobile One, and Cable and Wireless also conducted various types of research of specific target groups, for example, potential and actual users of IDD, International Calling Cards (ICC), pagers, and mobile phones. The issues covered in these researches include network quality and coverage, billing charges, assessment of delivery services, and other customer satisfaction indicators. Consumer product companies that advertise regularly are also commissioning more advertising research in recent times as consumer spending escalates.

A variant of mainstream marketing research is the tracking and continuous type of research. This form of research includes longitudinal studies, mystery shopping, and panel research; all of which are generally less popular in Asia than ad hoc marketing research. Tracking studies range from simple self-administrated questionnaires filled out in hotels, restaurants, or airlines to more sophisticated computer-based

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systems such as Marketmind and the Stochastic Reaction Monitor (SRM) operated by the Market Behavior group of companies in Asia. Both systems, though different in their marketing philosophy and orientation, use fairly consistent methodology based on weekly quota interviews and rolling samples. These systems aim to provide information on brand and mind shares, product imagery, advertisement recall and effectiveness, predisposition profiles of respondents and operational coverage, etc.

Another form of continuous research is the mystery shopping survey, which uses evaluators to assess an organization's outlets and operations in an unbiased and factual way. Mystery shopping survey assesses service quality, product knowledge of staff, and efficiency of operations in shops, outlets, and branches of both the competitors and the client. Businesses that have lots of direct service contacts with customers typically use mystery shopping surveys as a means of obtaining consumer feedback. Examples of such businesses include Shell and British Petroleum (BP), fast food outlets such as McDonald's and Long John Silver, banks such as The Hong Kong and Shanghai Bank (HKSB) and Overseas Chinese Banking Corporation (OCBC), and major airlines such as Singapore Airlines and British Airways. The mystery shopper survey's performance score is often integrated with results from conventional research with customers to provide clients with an overall customer satisfaction index for itself, as well as for their competitors.

Another way of conducting planned primary data in Asia is through the use of consumer panels. Consumer panel is a longitudinal survey of the same samples of individuals or households to record their attitudes, behavior, or purchasing habits over time. Panels are especially useful for tracking repeat-purchase behavior and purchasing habits along with changes in price, special promotions, or other aspects of marketing strategy. In Asia as in the West, packaged-goods companies using their own resources or the services of marketing research agencies usually conduct panel research on continuous basis.

3. Globalization and international marketing research

The major and more profitable companies operating in Asia are the big six marketing research agencies. These agencies are Market Behavior (parent company: NFO Worldwide based in the United States), Asia Marketing Intelligence (AMI), Sofres Frank Small (Sofres FSA), Research International (RI), Nielsen-SRG, and Acorn, (a Singapore-based company that has seen expansion in the region mainly through strategic alliances with other agencies).

Multinational companies would want to use agencies with a regional, if not a global, presence given the commitment and spread of their investments and markets. Foreign markets are becoming increasingly important to multinational companies, and this has led to a shift in the organ-

ization and philosophy of these companies. The benefits of an international approach to research buying include better control and coordination of the research in many countries, comparability of the research findings, and better understanding of the marketing functions on a transnational basis. According to Banks, (1997, p. 5), there were also strong economic reasons for standardization and rationalization of research methods and international coordination. By careful design and updating of methods, companies avoided the cost of reinventing the wheel. Through standard presentation of conclusions, researchers avoided information overload, and this enabled managers to assimilate results in a quicker and actionable manner. Research fees were usually more economical if the research was commissioned to one international agency across many countries than to many small, independent companies.

The demand of companies for quick, actionable, and comparable results has put tremendous pressure on agencies to review their organization and working philosophy. Traditional research agencies run fairly independently with regular reporting to the parent company only in financial and revenue matters. Research techniques or sector knowledge are usually not shared, and there is very little transfer of skill, expertise, or management information between the different local country management staff.

Research agencies in Asia are now more reflexive and proactive in their management style as international coordination research work grew. Out of the estimated US\$211-million research revenues among the big six, fully US\$49 million (24%) was accounted for by research in which there is an international dimension (Banks, 1997, p. 5). In Singapore, where one of the authors worked in Market Behavior Singapore for many years, he saw the international research work component grew from a low percentage of 10% in 1988 to over 50% in 1998.

In response to clients' needs, marketing research agencies are now more mindful of the minefields and barriers in multi-country research programs. These barriers could include translation problems, cultural and lifestyle nuances, response biases in certain countries, different stages of market development for a product or brand, and even political and legislative background that may affect the gathering of public opinions. Agencies have responded to these challenges by various measures such as holding international seminars and training sessions, encouraging staff mobility between different country offices, and seeing that local research agencies have a major say in matters such as sample structure, questionnaire design, and report writing.

4. Global research techniques/products and specialist sector knowledge

The marketing research agencies have also responded to the increasing client demand for more accurate and

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