

## Hot topic

## Qualitative research

## Verbatim:

*'There's a desire to move away from total reliance on the focus group as the only answer.'*



Consumers, such as these shoppers in a traditional Indonesian market area, are often more receptive to ethnographic research methods than focus groups.

# SHIFT THE FOCUS

## Ethnography proves fruitful in emerging economies

By MICHAEL FIELDING  
Staff Writer

Consumers familiar with Western lifestyles and armed with the latest technology have shifted the emphasis in marketing from “push” to “pull” in even the most nascent of emerging economies. That, in turn, is changing the way consumer research, including qualitative research, is conducted in those young markets.

Even the poorest consumers in those regions have rapidly adopted technology and have accepted new research methods. Researchers say that the widespread use of cell phones among consumers, increased Internet access even in the remotest places and acceptance of ethnography as a research tool now allow for an advanced level of research similar to that conducted in some Western countries just a decade ago.

For example, the number of mobile phone subscribers in Africa skyrocketed to 113.5 million in 2005 from just 7 million in 1999. And in rural Indonesia—where 54% of

the population resides—consumers are allowing researchers into their homes for days at a time to conduct ethnographic research.

“Because of the changing political and social climates, they’re really becoming fruitful ground for (researchers’) products and services,” says Marla Commons, vice president of qualitative research at Chicago-based Research International.

### Asia

“There’s a desire to move away from total reliance on the focus group as the only answer,” says Sue Phillips, director of qualitative research for Asia Pacific for Chicago-based research giant Synovate Inc. “There’s a feeling that clients are not getting as much out of qualitative research (in emerging economies) as they could be, so now there’s a focus on ethnographic approaches.”

In markets such as Indonesia and Thailand, the use of ethnography helps combat inherent cultural obstacles that Western researchers don’t often encounter elsewhere. “People don’t say what they mean, and they don’t

mean what they say (in group interview situations), so researchers are now actually watching people shop, watching them in their homes,” she explains.

Focus groups still are used, though with some challenges. In Asia, for example, Phillips notes that the more intimate the setting, the better the understanding of the consumer—particularly in younger markets where clients know little about consumers going in.

“Clients are realizing that smaller groups of six or less (in focus groups) are more manageable,” Phillips says, adding that the norm is eight to 10 in the United States and seven in Europe. “In Asia, it’s difficult to open up in public situations. Asians don’t want to lose face. It’s also more difficult to hide in a smaller group, so culturally it’s a positive move.”

Ethnographic studies are generally more affordable than focus groups since ethnographic studies use a small number of participants in a small environment. Focus groups—particularly in rural areas—can be costly

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## Proper message, design in global markets require tests

By DEBORAH L. VENCE

More companies are dedicating time and money to global marketing efforts, but many are unsure of the *best* way to introduce a product or service to an international market.

Marketing strategies used to introduce products in the United States don’t necessarily work elsewhere. As marketers seek to best localize their product offerings in ways that are culturally acceptable, research and testing are all the more important, experts say,

to help ensure that the design and message fit the intended market.

“If we take a big seller or a big brand in the United States and introduce it in another country, (we can’t) expect it to do just as well,” says Mary Beth Lake, head of global product design and development for Chicago-based Synovate Inc., the market research arm of Aegis Group plc, based in London.

Lake suggests that companies take several steps back before introducing products to international markets.

“(Companies have to) embrace the different cul-

tures, different regions. (Companies need to ask), what are (those consumers) looking for that they don’t now have? How do you position those products in that way? There are a lot of different aspects to introducing products into (different) cultures,” she notes.

Companies getting ready to launch a product in a foreign market should keep in mind a few valuable research methods to help identify and break through cultural barriers.

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## ETHNOGRAPHY / From page 18

## Economic hubs allow researchers easy access

because of the transportation between rural and urban areas.

What may emerge is a unique sort of blend in which, in rural areas, researchers identify key leaders and their families to be interviewed and gather informally with them in a community center at a time convenient for the locals.

"It's a much less rigid, fixed, formal approach. People may pop in throughout the day," Phillips says about the open invitation to extended family members to participate in the research at their convenience. Because of the informality, too, this approach may be considered more closely related to ethnographic research than to a focus group.

Dina Mehta is familiar with such an approach. A qualitative researcher based in Mumbai, India, Mehta spent 10 years with IMRB, India's largest market research agency, before forming her own consultancy firm, Explore Research & Consultancy, in 1998. Her research in rural India has focused on the ways that information and communication technology is being used as a tool to empower the poor.

Multinationals are deeply interested in learning about consumers on the consumers' terms. So while focus groups are still a popu-

lar method of conducting qualitative research, companies are using ethnography as a supplement.

It's also about communicating those lives back to the client, researchers say. "Clients don't just want to hear about their consumers in theory; they want to see them," Phillips adds.

For example, a byproduct of improved infrastructure and better technology in emerging markets, some researchers also are including more digital photographs in their reports—and the researcher-client relationship is no longer limited to a formal final report. Some Indian researchers, for example, blog with clients on an ongoing basis while still in the field. They relay observations and data to clients, who in turn can ask them to modify their research depending on their findings. So blogging allows clients to direct researchers as they see fit, and vice versa.

Technology enables Western companies to go to these new consumer markets on their terms, but the researchers have to be willing to take that step, Phillips says. "Don't expect these people to sit around a boardroom," she says. "The whole point of qualitative research is to enter into a dialogue with

them. It means you start to hear what their needs are—then you can spot opportunities for your clients."

**Africa**

The African telecommunications industry is growing faster than anywhere else in the world, and researchers are using that fact to their advantage.

"You'll find (cell phone) technology right in the middle of nowhere, so researchers can disburse information via phones," says Ellington Kamba, a researcher with Research International USA. Cell phones are used to convene focus groups in rural areas and to interact via text messages with respondents in urban areas.

High cell phone penetration has given researchers hope to incorporate the technology in future research applications such as sending photographs of purchases or gatherings. With about 100 million cell phone subscribers on the continent, one in nine Africans now owns a cell phone, according to Kenya's information and communication minister. For marketers, it is one of few links between the rich and the poor. "As a researcher, Africa is an interesting market because you have the haves and have-nots; you are dealing either with the very rich or the very poor," adds Kamba, who is based in Chicago but is a native of Zimbabwe. He has conducted research in several markets across Africa.

As a result of the disparity in wealth distribution, some market researchers have created living standard measurements (LSMs) to categorize African consumers. These new standards measure not how much money consumers have but where and how they spend it. "It is about the lifestyle as opposed to how much you earn," Kamba says about the standards.

The standards analyze the use of durable goods such as cars, telephones and other household goods in addition to the availability of electricity and running water. The LSMs provide a better standard-of-living measure than household income, Kamba says. Since some items are scored positively (such as cars, cell phones and electricity)

and others are scored negatively (such as mud houses and well water), each household is assigned a total score ranging from 3 (very poor) to 15 (very rich).

Meanwhile, marketers are able to use new research to move away from localizing products too narrowly, instead relying on consolidated, regional research that analyzes similar consumers in neighboring countries.

Kamba says the local approach is being dismantled and replaced by what he calls "sectors of influence."

Historically, brands in Africa have been deeply localized, with numerous varieties of the same products from the same company disbursed across the continent. "Now the trend is that marketing is much more global, more mature," Kamba explains, adding that laundry detergent and soap brands have felt the most impact. "It became costly to manage several small brands, and this allows companies to concentrate manufacturing and distribution in one site. The trend now is that you go to a hub of economic activity" to conduct

research. In Africa, those hubs are South Africa, Kenya, Ghana, Nigeria and Egypt.

Similar to some Asian markets, focus groups are conducted in the communities themselves, rather than at official research facilities in an urban setting. "In some cases, the facilities are so upscale that the respondents are overwhelmed. They're not at ease," he says.

Also, increasingly, researchers are trying to reduce bias in the results by creating an environment in which respondents can discuss their opinions freely. That hasn't always been the case: In the past, respondents often had to travel several uncomfortable hours by bus to research facilities, and finding enough respondents could be difficult. The new concept of economic hubs enables researchers to draw from a more geographically friendly modernized area with better transportation.

"In the past, if you wanted to understand Malawi, you would have to go to Malawi," Kamba says. "(Technology and modernized research methods) are simplifying the process. (Africa is) becoming more organized as a consumer market." ■

**'The whole point of qualitative research is to enter into a dialogue with (consumers).'**

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