

Conducting International Online Research 执行国际在线调查



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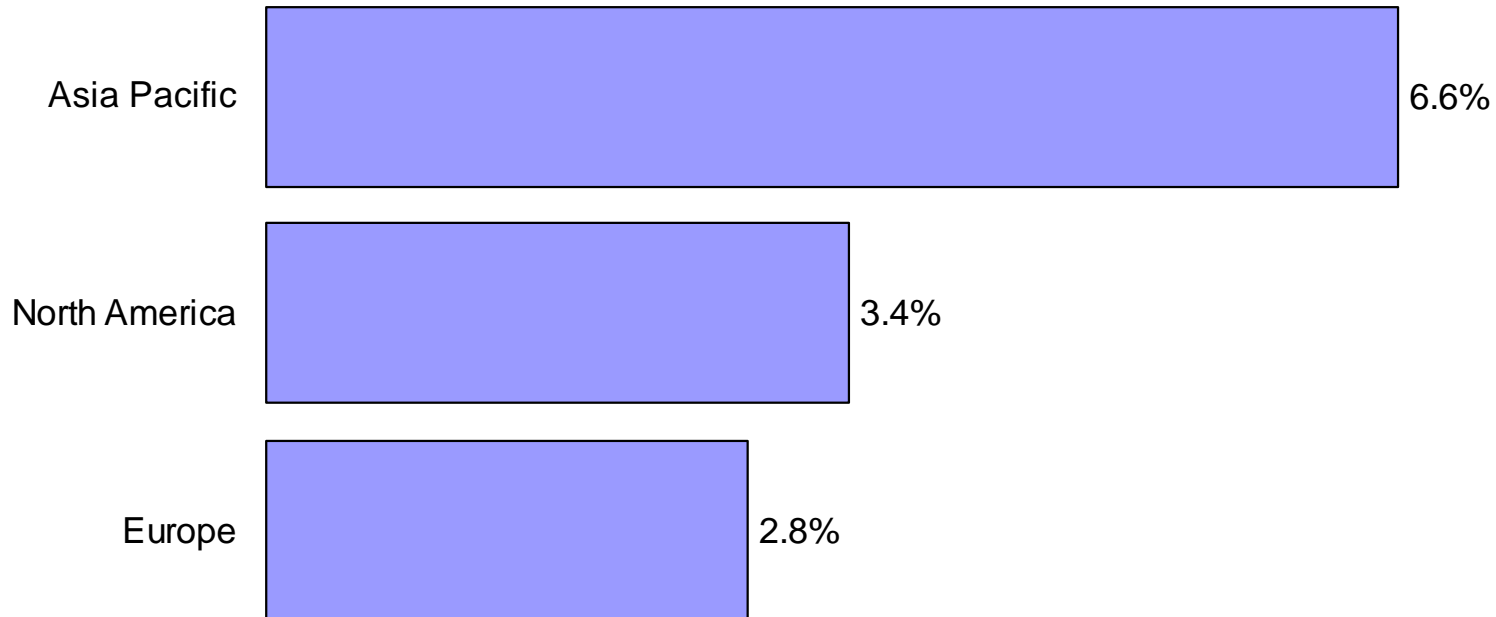
Agenda 议程

- Setting the scene 背景概览
- Europe 欧洲
- APAC 亚太
- International market research 国际市场调查
- Doing international fieldwork 如何执行好国际市场调查
- Key to success 成功的关键点
- Question and Answer 提问与解答

Setting the scene 背景概览

2006: The fastest growing regions in the world for Market Research?

2006: 市场调查增长最迅速的地方



Asia Pacific now 14% of worldwide MR revenues

目前亚太地区市场调查总额占全球的14%

source: ESOMAR 'Global Market Research 2007'

来源: ESOMAR “2007全球市场调查”

Setting the scene 背景概览

Growth within the region above average growth

以下国家/地区的增长高于世界平均增长水平

Country	2005	2006
China	US\$475 million	US\$583 million
CIS	US\$18 million	US\$22 million
Vietnam	US\$10 million	US\$12 million
Korea	US\$282 million	US\$335 million
Malaysia	US\$42 million	US\$49 million
Hong Kong	US\$76 million	US\$88 million
Bangladesh	US\$7 million	US\$8 million
India	US\$102 million	US\$115 million
Pakistan	US\$11 million	US\$12 million
Singapore	US\$51 million	US\$55 million
Thailand	US\$58 million	US\$62 million

source: ESOMAR 'Global Market Research 2007'

来源: ESOMAR “2007全球市场调查”

Setting the scene 背景概览

MR growth within the region below average growth
一下国家/地区的增长低于世界平均增长水平

Country	2005	2006
Australia	US\$522 million	US\$532 million
Taiwan	US\$98 million	US\$99 million
Myanmar	US\$4 million	US\$4 million
Sri Lanka	US\$4 million	US\$4 million
Cambodia	US\$3 million	US\$3 million
New Zealand	US\$87 million	US\$86 million
Japan	US\$1405 million	US\$1380 million
Philippines	US\$41 million	US\$37 million
Laos	US\$2 million	US\$1 million
Indonesia	US\$31 million	US\$12 million

source: ESOMAR 'Global Market Research 2007'

来源: ESOMAR “2007全球市场调查”

Setting the scene 背景概览

- excluding the USA, eleven countries in the world with populations larger than Germany?
除美国以外，世界上还有11个国家人口数量超过德国
- make up 56% of the worlds population!
这些国家人口占世界人口总数的56%!
- but only 13% of global GDP
然而国内生产总值仅占全球的13%

Country	Population
China	1,306,313,812
India	1,080,264,388
Indonesia	241,973,879
Brazil	186,112,794
Pakistan	162,419,946
Bangladesh	144,319,628
Russia	143,420,309
Nigeria	128,765,768
Mexico	106,202,903
Philippines	87,857,473
Vietnam	83,535,576
World	6,499,697,060

source: US Census Bureau,
International Database, 2006 mid year estimates

Setting the scene 背景概览

- even if we just consider the “consumer class”
即使我们只考虑“消费群体”
- the numbers are huge
其数量也是很庞大
- China = USA
中国=美国
- India > Germany
印度>德国
- Vietnam = the Netherlands
越南=荷兰

Country	Consumer class	
	no:	%
China	300,452,177	23%
India	97,223,795	9%
Indonesia	24,197,388	10%
Brazil	65,139,478	35%
Pakistan	8,120,997	5%
Bangladesh	12,988,767	9%
Russia	64,539,139	45%
Nigeria	6,438,288	5%
Mexico	48,853,335	46%
Philippines	21,964,368	25%
Vietnam	15,871,759	19%

source: University of Minnesota, 2003 except

Bangladesh – University of California

Vietnam - Vietnam General Statistical Office (percentage owning a refrigerator)

Setting the scene 背景概览

- GDP growth is amazing
国内生产总值增长迅速

Country	GDP growth 1996-2005
China	133%
India	98%
Indonesia	19%
Brazil	2%
Pakistan	88%
Bangladesh	47%
Russia	84%
Nigeria	167%
Mexico	128%
Philippines	15%
Vietnam	92%
World	47%

source: International Monetary Fund

来源: 国际基金协会

Setting the scene 背景概览

➤ and demographics are on your side
人口结构也支持经济增长

	% adult population < 35	% adult population over 65
China	40%	10%
India	50%	7%
Indonesia	48%	8%
Brazil	47%	8%
Pakistan	56%	7%
Bangladesh	58%	5%
Russia	35%	17%
Nigeria	58%	6%
Mexico	50%	9%
Philippines	54%	6%
Vietnam	51%	8%

USA	35%	16%
UK	32%	20%
Germany	28%	21%
France	32%	21%

source: US Census Bureau,
International Database, 2006 mid year estimates

Setting the scene 背景概览

Some big global MR buyers
一些主要的调研购买者



Setting the scene 背景概览

Global Trends

全球趋势



- China is P&G's 6th largest market
中国是宝洁的第六大市场
 - forecast to become number 2
预计将成为其第二大市场
- US\$1.8 billion revenues (2007 US\$3.75 billion)
18亿美元营业收入 (2007 37亿5千万美元)
- profit growing at 140% pa
收益每年增长1.4倍

source: Booz Allen Hamilton, 2005

Setting the scene 背景概览

Market Research 市场调查

- Growth in demand for international online sample
国际在线样本需求增长
- but change in mode (to online) having local impact?
然而调研方式的转变（线下到线上）有地区性影响？
- UK international revenues down 5% in 2005
英国2005年国际调查营业额下降5%
- Strong growth APAC: China (+25%) and India (+11%)
亚太区大幅增长：中国（超过25%），印度（超过11%）

Setting the scene 背景概览

Market Research 市场调查

- Pressure on pricing (therefore revenues) in North America and Europe
北美和欧洲面临价格压力，从而面临营业额压力
- Change in mode 方法转变
- Outsourcing 外包
- Large demand for international Business to Business
对国际B2B的巨大需求

Great opportunities in international research

国际调查的巨大机遇

Great opportunities for inbound research in China

针对中国调查的巨大机遇

Let's talk about International Online Research....

下面我们谈谈国际在线市场调查……



- with online access panels who needs local researchers to do international research?
有了在线会员数据库，谁还会需要依靠本地调查机构开展国际调研？

let's face it...

让我们来面对它……

you can do the whole thing from the privacy of your own home

你可以在家舒舒服服地完成所有步骤

Sampling

抽样

Questionnaire Design

问卷设计

Analysis

数据分析



but
然而.....

should you?
应该这么做吗?



Panel Companies 在线样本提供商

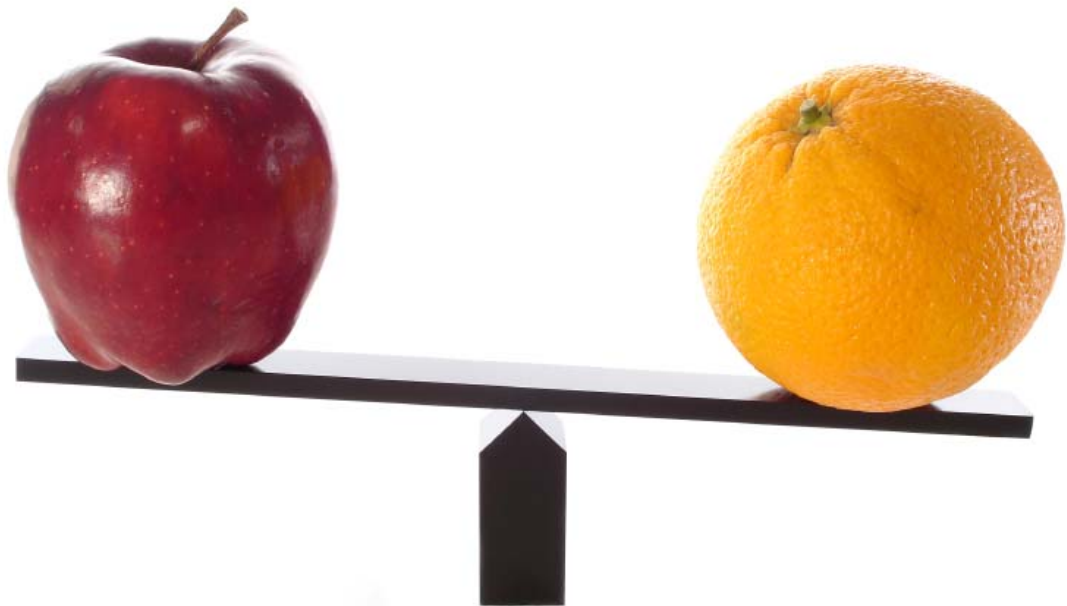
- Can sell you everything you need to conduct your project
能提供你需要的一切，来帮你完成调研项目
- And will do....
且付之于行动……



Swiss Army Knife 瑞士军刀
price(价格)=1 \$
Is this true? 这是真的吗?

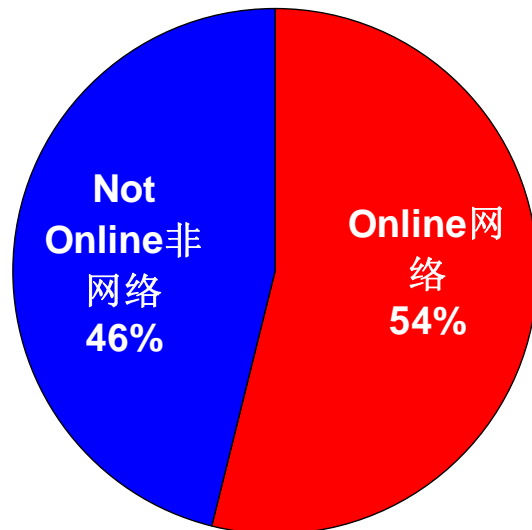
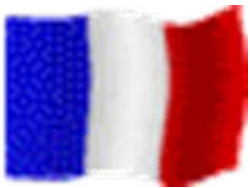
only you can decide 只有你能决定

- Because you are now 100% in charge
因为，现在你是百分百的决策者



should you do it? 你应该这么做吗?

- does the online population **represent** the target population?
在线人群能**代表**目标群体吗?
- the headline penetration masks the reality
网络覆盖率表象掩盖事实



Internet Penetration by Age – France

法国网络普及率（以年龄划分）

Age 年龄	Internet Penetration 普及率
15-24	69%
25-34	65%
35-44	46%
45-54	41%
55-64	28%
65+	15%

Source: EIAA Media Consumption Study – October 2004

just how typical is he?
这位网民，有多大代表性？



Selected Internet Penetrations

部分国家网络普及率

Europe

Country	Penetration
Sweden	76%
Portugal	74%
Netherlands	73%
Denmark	69%
Finland	62%
United Kingdom	62%
Germany	61%
Austria	57%
France	54%
Italy	53%
Ireland	50%
Czech Republic	50%
Belgium	49%
Spain	44%
Greece	34%
Hungary	30%
Poland	30%

Asia

Country	Penetration
Hong Kong	68%
Japan	67%
South Korea	67%
Singapore	66%
Malaysia	48%
Macao	40%
Vietnam	19%
Philippines	16%
Thailand	13%
China	12%
Indonesia	9%
India	4%

Americas

Country	Penetration
United States	70%
Canada	68%
Chile	42%
Argentina	34%
Mexico	21%
Peru	21%
Brazil	21%
Colombia	16%
Venezuela	13%

how do these match with the 'consumer class'?

这些数据与“消费群体”真正相吻合吗？

Asia Pacific panels..... 亚太在线样本数据库.....



Australia

People's Republic of China
(incl Hong Kong and Macao)

Taiwan (Republic of China)

Indonesia

Japan

South Korea

Malaysia

New Zealand

Singapore

Thailand

Vietnam

a lot is possible! 很多事情都有可能 !

International Market Research 国际市场调查

What is Market Research? 什么是市场调查?

- Asking the **right** people the **right** questions and **understanding** their answers
向合适的人群提出合适的问题，并且正确理解他们的回答

Questionnaire Design

问卷设计

Fieldwork

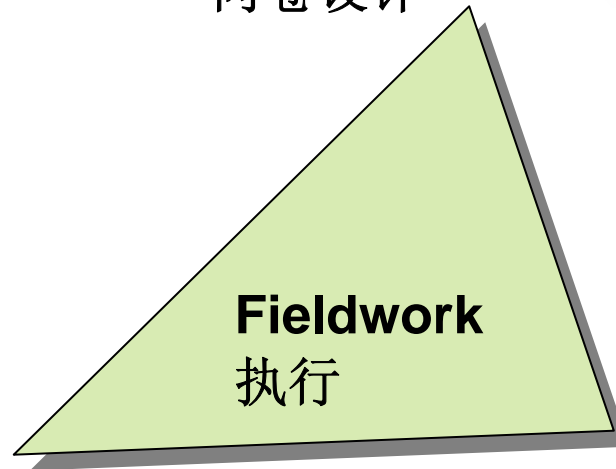
执行

Sampling

抽样

Interpretation

翻译



Is International Market Research the same? 国际市场调查也一样吗？

- Yes, but
是的，但是
- Problems arise from
问题在于
 - not knowing how to phrase a question to a 'foreigner'
不知道怎样向“外国人”编纂问卷问题
 - not understanding the answer given in their cultural context
不明白特定文化环境下答案的真实意义
 - not knowing what the answer list should be
不确定备选答案该如何编制
- The sampling is actually the easy bit.....
事实上，抽样成了容易的部分……

Questionnaire Design – Localisation

问卷设计-本地化

- Your questionnaire will almost certainly need to be localised
几乎所有问卷必须进行本地化处理
 - Things that will almost always change
变化也是王道
 - Brand lists
品牌列表
 - Watch for localised “same” brands 注意品牌的本地名称
 - Product categories
产品类别
 - Currency
货币单位
 - Retail distribution patterns
出售方式

See any similarities here? 看出相似之处了吗？





OPEL



CHEVROLET



VAUXHALL



it's not just about brands 这不仅仅是品牌问题

➤ retail channels
销售渠道



it's not just about brands
这不仅仅是品牌问题

➤ Retailers
零售商



METRO Group

The Spirit of Commerce



WAL★MART®

沃 尔 玛

wal-martchina.com

TESCO

it's not just about brands 这不仅仅是品牌问题

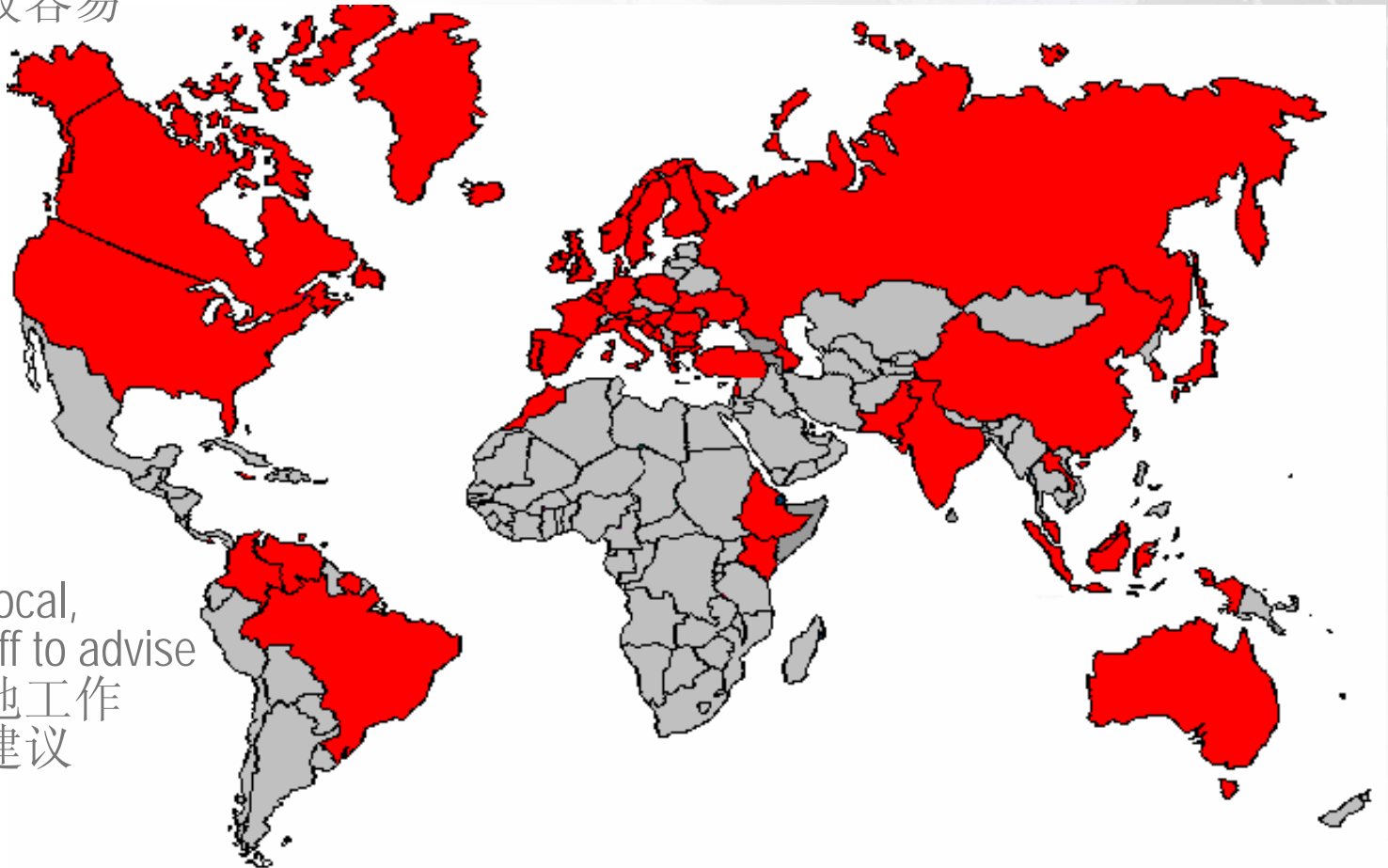
➤ eating habits
饮食习惯



Localisation 本地化

➤ is relatively easy
相对比较容易

➤ requires local,
native staff to advise
需要当地工作
人员的建议



Cultural Effects 文化影响

- are much more difficult to handle
对文化的把握难度更大
- “if there is a difference in response across cultures then what we measure in international research may simply be a national predilection for a certain score/response, or differences in levels of social desirability, rather than an observable phenomenon”
“如果不同文化间出现不同的回答，那么我们在做国际调研时需要斟酌的或许就仅仅是不同文化对某一特定答案的不同偏好，或者社会期望层次的差别，而不是可观察到的现象。”



Hofstede Dimensions of National Culture Difference

霍夫斯特德国际文化差别维度

➤ Power Distance 权力差距

- Inequality, level of endorsement 'from below' (expectation and acceptance)
不平等性，认同层次由低到高（期望与接受）

- High in Spain, Portugal, France, Italy – “Latin”
西班牙，葡萄牙，法国，意大利（高） – “拉丁语系”

- Low in Germany, UK, Nordics – “Germanic”
德国，英国，北欧（低） – “日耳曼语系”

➤ Individualism / Collectivism 个体性/集体性

- Degree to which individual are integrated into groups
个体整合为集体的程度

- Individualistic – Developed & Western countries
个体性-发达&西方国家

- Collectivist – Developing & Eastern countries
集体性-发展中&东方国家



Hofstede Dimensions of National Culture Difference

霍夫斯特德国际文化差别维度

- Masculinity / Femininity
男性/女性
 - Degree of difference between Male and Female value sets (Females being more similar across cultures)
男性与女性价值观的差别程度（不同文化间女性价值观更相近）
 - Masculine – Austria, Italy, UK, Germany
男性化-澳大利亚，意大利，英国，德国
 - Feminine – Netherlands, Denmark, Sweden, Norway
女性化-荷兰，丹麦，瑞典，挪威
- Uncertainty Avoidance
回避不确定感
 - a society's tolerance for uncertainty and ambiguity
一个社会对不确定感和歧义的容忍度
 - Avoiding = Laws & Rules: Greece, Portugal, Russia
回避=法律&法规：希腊，葡萄牙，俄罗斯
 - Accepting = Tolerant & Unemotional: UK, Sweden, Denmark
接受=容忍&淡漠：英国，瑞典，丹麦



Hofstede Dimensions of National Culture Difference

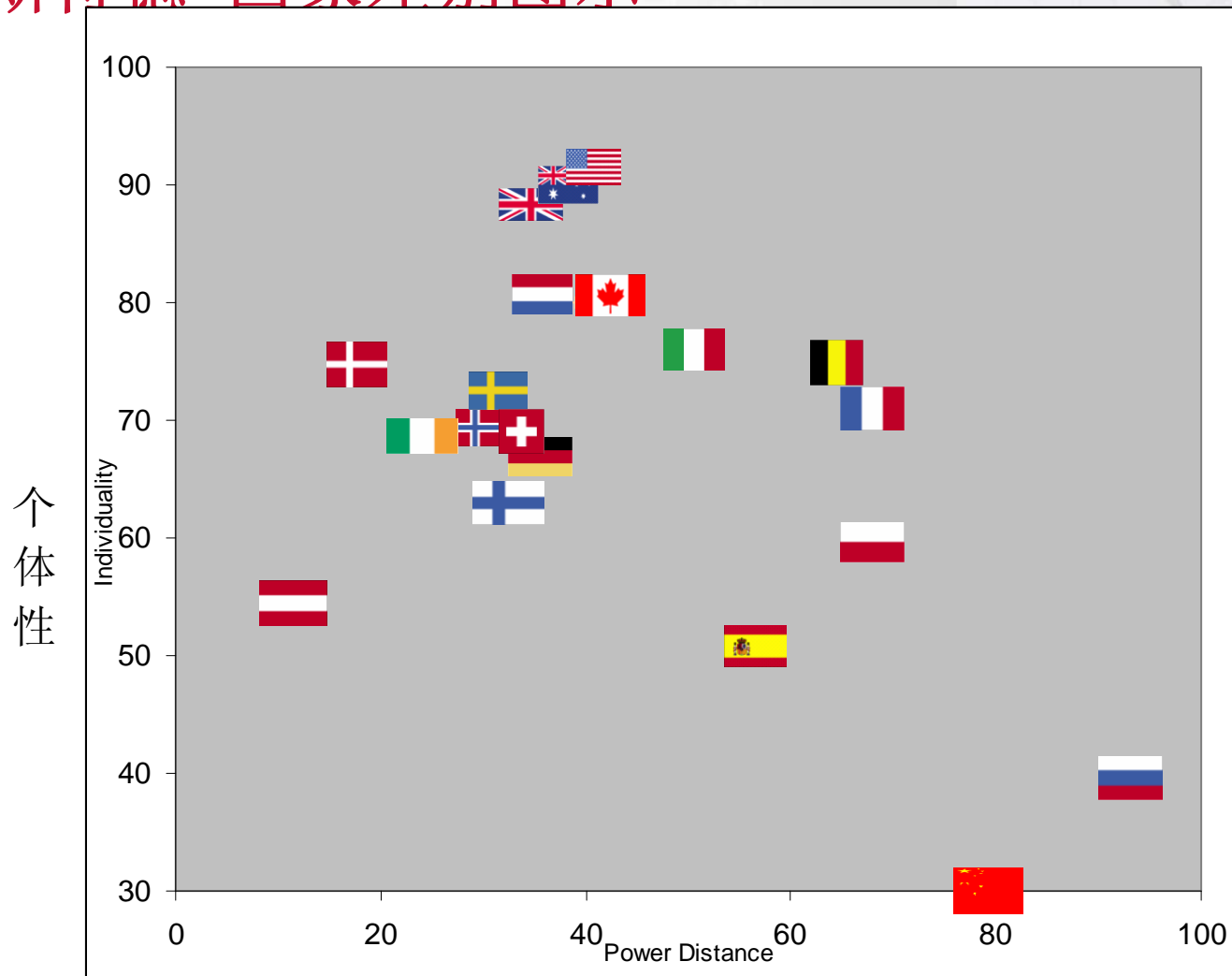
霍夫斯特德国际文化差别维度

- Demonstrated correlations
被证明了的关联性
 - Power Distances correlates with violence in politics and income inequality
权力差距与暴力政策和收入差别正相关
 - Individualism correlates with GDP and social mobility
个体性与国民生产总值和社会流动性成正相关
 - Masculinity negatively correlates with government charity
男性化与政府慈善成反相关
 - Uncertainty avoidance correlates with legal need to carry ID cards
回避不确定感与携带身份证的法律需求成正相关



Hofstede - Plotting countries

霍夫斯特德-国家差别图示

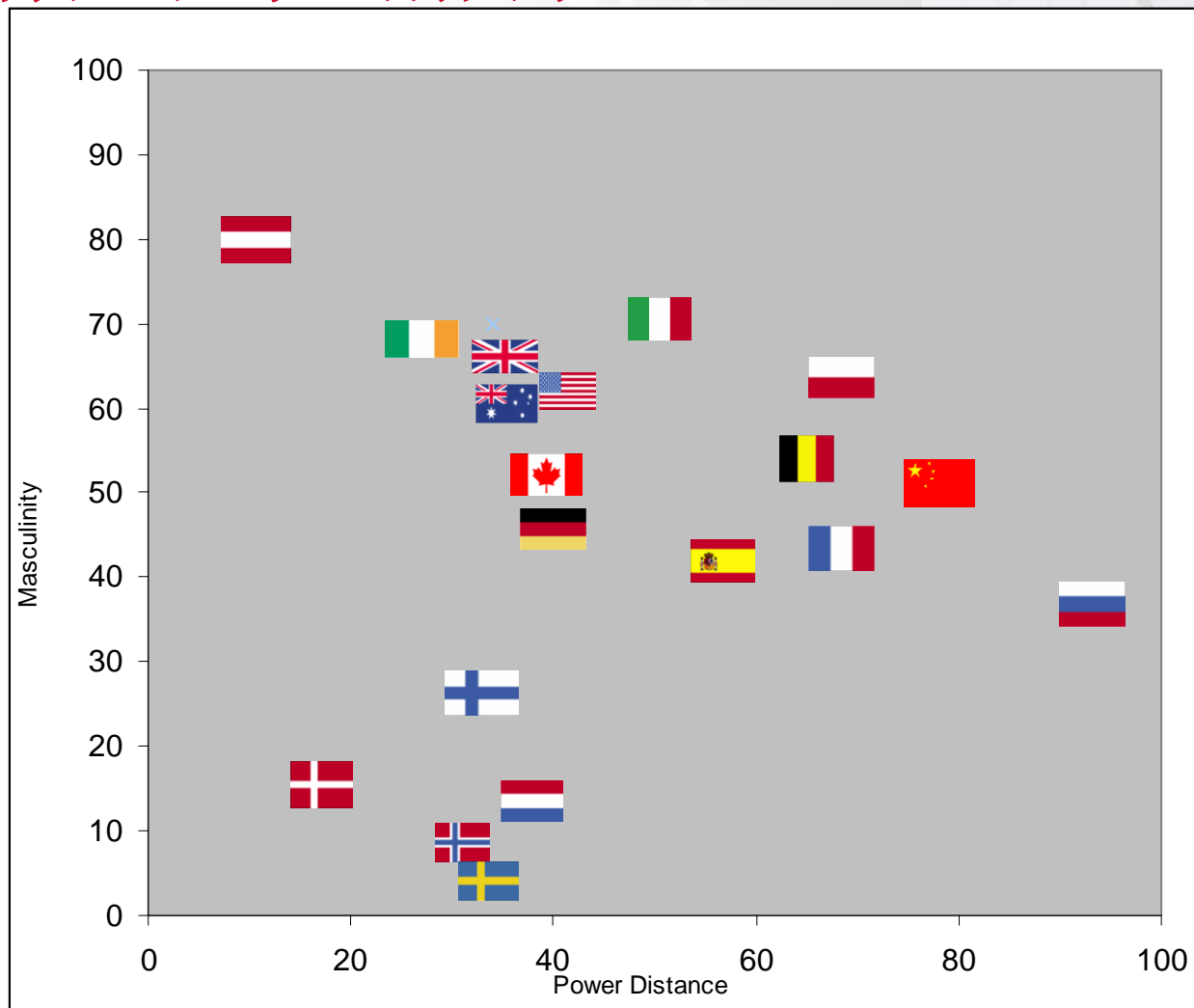




Hofstede - Plotting countries

霍夫斯特德-国家差别图示

男性化

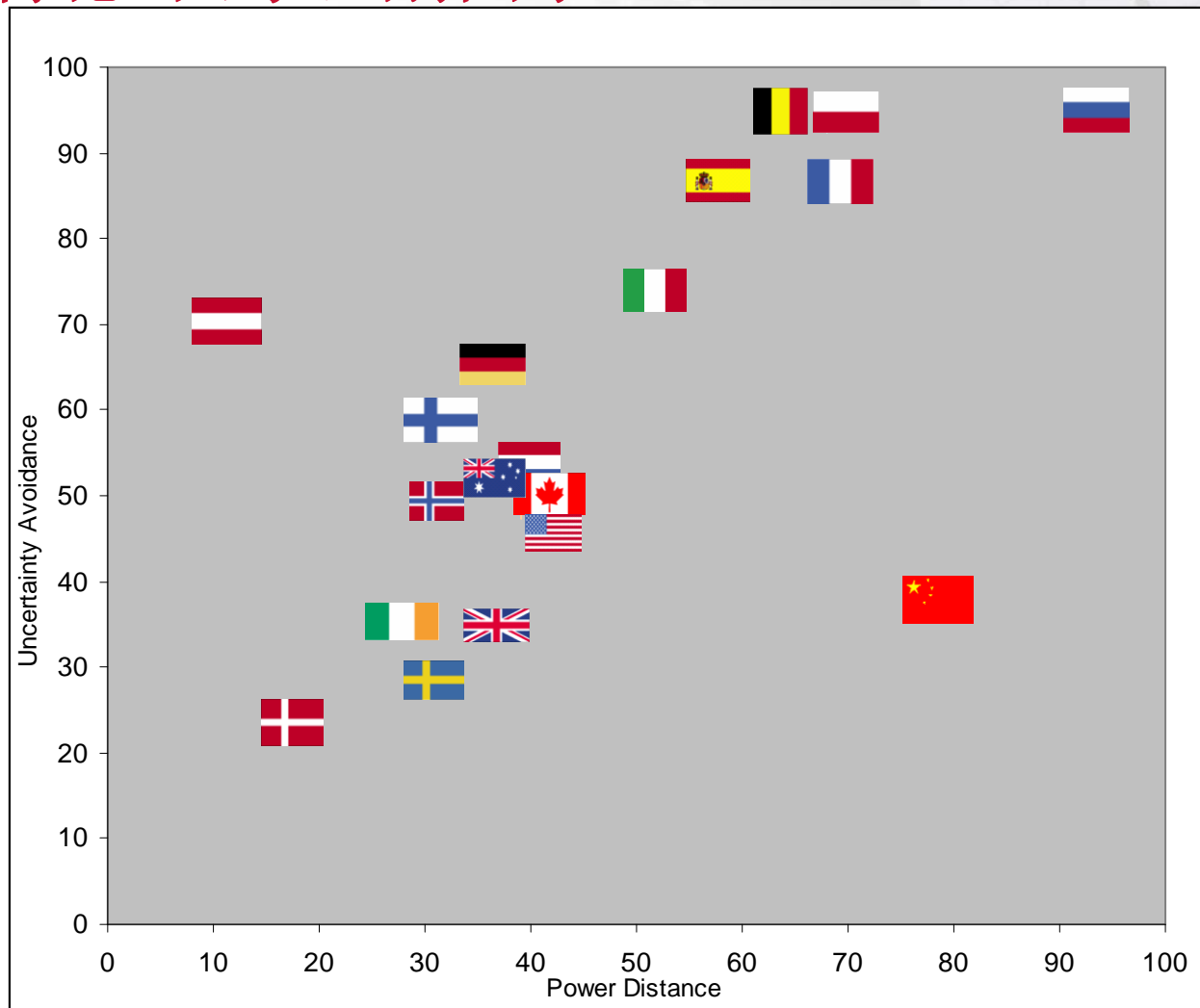




Hofstede - Plotting countries

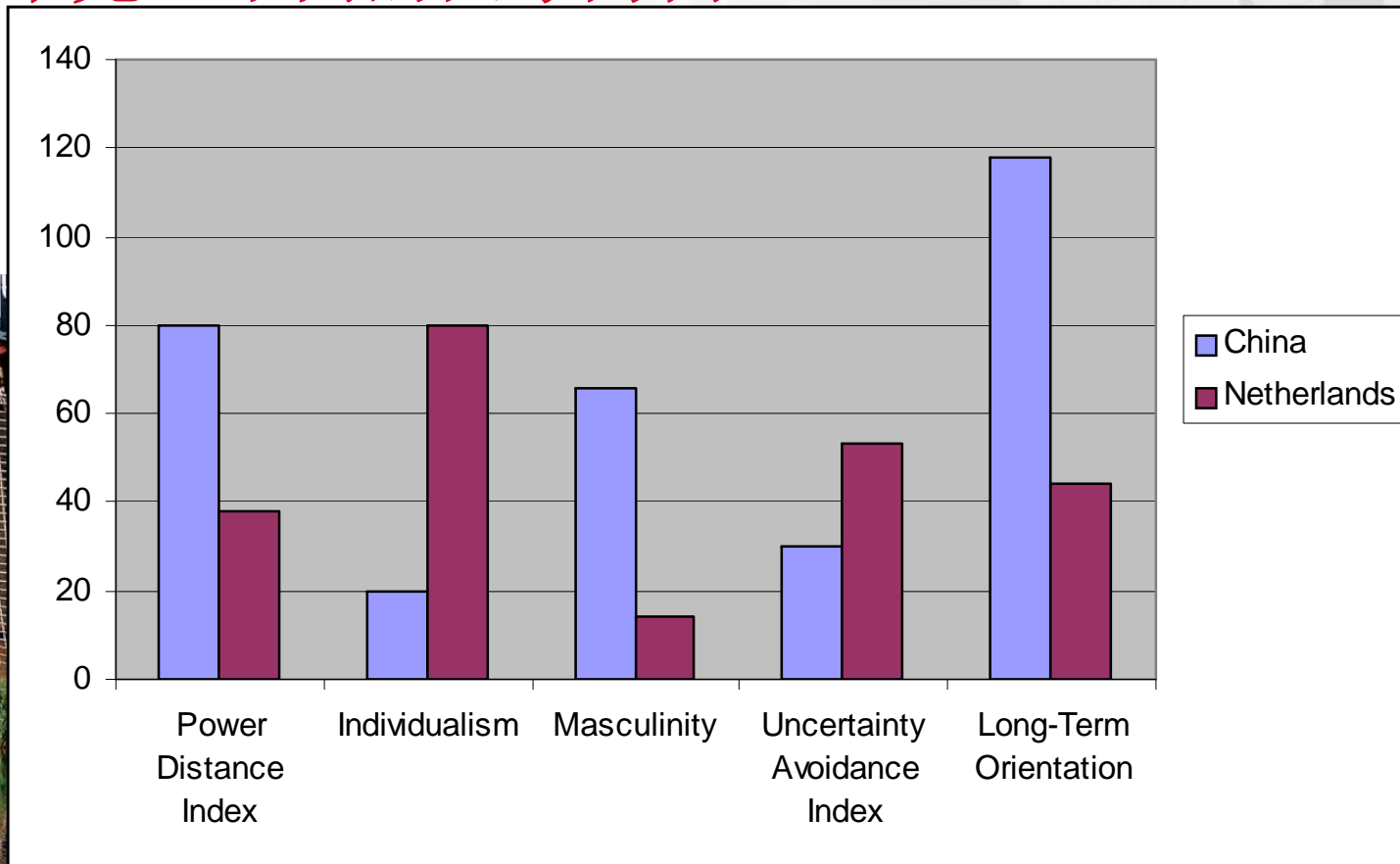
霍夫斯特德-国家差别图示

回避
不确定
感





Take 2 completely different countries 以两个完全不同的国家为例



Bart Wichers
Evelien Zengerink



The experiment 实验

- Same sample source
相同的样本来源
- Same sample structure
相同的样本结构
- Same questionnaire
相同的问卷
- Three modes
三种模式
 - CATI
 - CAWI
网络调研
 - Face – to – Face
面访

Social Desirability 社会期望

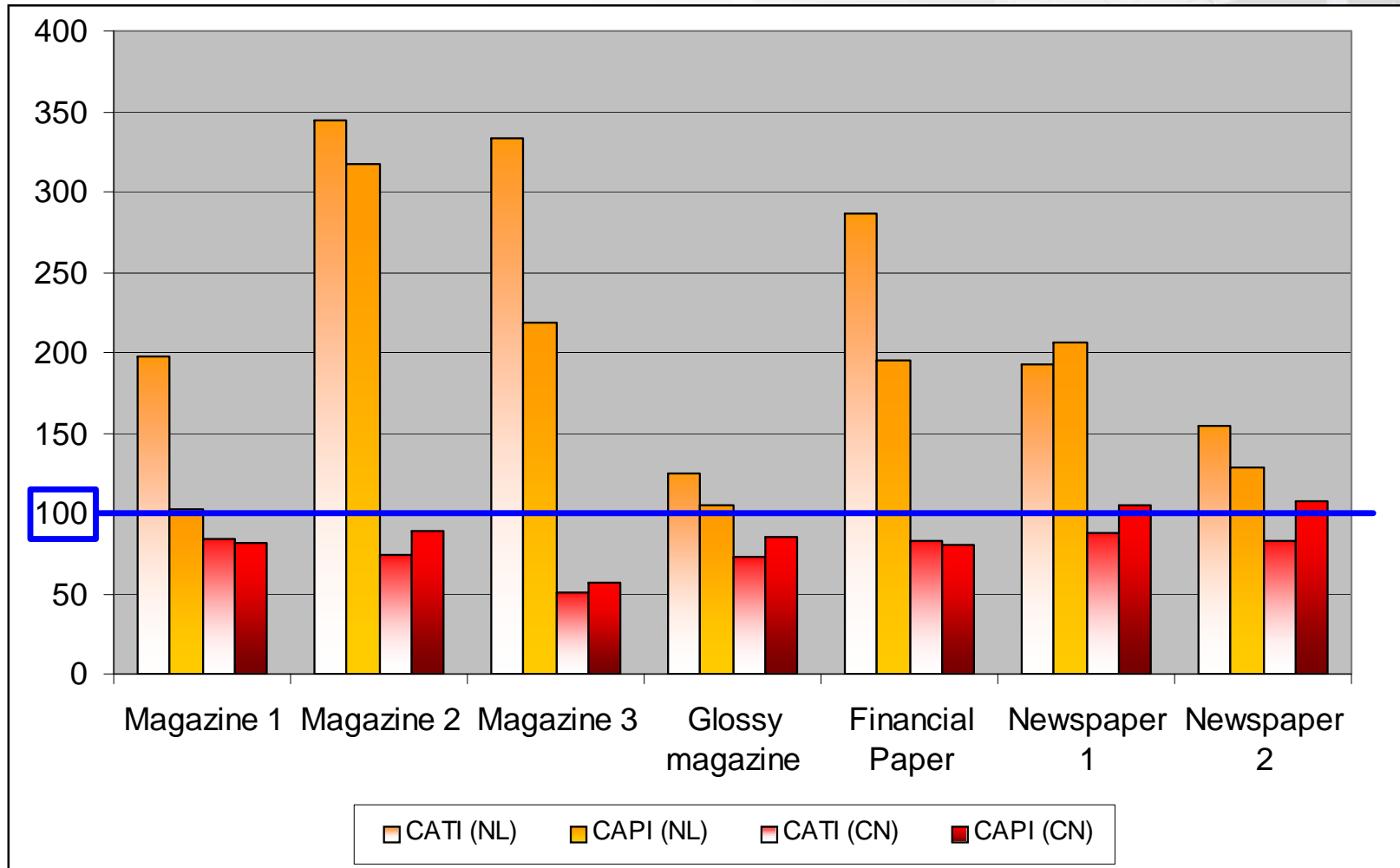
- Implications for bias
误差解读
 - Westerners expect interviewed modes to show more social desirability
西方人希望调研模式能够更好地表现社会期望
 - CATI highest (easier to lie)
最高-电话访问（更容易说谎）
 - CAPI middle (harder to lie)
居中-（不易说谎）
 - CAWI bottom (no need to lie)
最低-网络调研（没有必要说谎）



Social Desirability 社会期望

- Readership of prestigious magazines and newspapers
著名杂志报纸的阅读量
- Social “norm” in the Netherlands?
荷兰的社会“标准”？
 - Individualistic
个性化
 - Self-enhancement
自我放大
- Social “norm” in China?
中国的社会标准？
 - Collectivist
集体化
 - Modesty
谦虚

Social Desirability – Readership 社会期望-阅读量



To sum up 总结

- The opportunities here and in the region are enormous
在这个国家以及整个地区都存在着重大机遇
- It is not easy for Westerners to conduct research effectively here
对西方人来说，在中国进行有效的网络调研并不容易
 - because of the mis-match in cultures
因为，文化差异显著
- Your opportunities are also enormous
你也拥有巨大机遇
 - but the mis-match still remains
然而，差异仍然存在
- SSI is well equipped to be your ideal partner
为成为您理想的合作伙伴，SSI已经全副武装