

# International Research

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Golden Rules

**.YONDER**





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## Introduction

**Successful delivery of international research relies on a huge range of different factors, from technical capabilities and quality controls through to rigor of translation, cultural understanding, and expertise. The investment that companies commit to global research programmes is sizeable, and with the number of moving parts, the scope for error considerable. Throughout this document we will examine a number of issues which form the building blocks of high quality global research which in turn delivers actionable findings for research buyers.**



## Choosing a methodology

The vast majority of global research in the industry is now conducted online due to speed and cost. Face to face and telephone research tend to be employed to extend reach into markets that do not have mature online panels or where a high quality random sample is desired. For this reason the vast majority of this paper focuses on online approaches, however it is worth discussing factors which may impact the selection of methodology.

In choosing a methodology for global research it is always important to strike the right balance between representativity, market reach, cost effectiveness and methodological rigor. Assuming that a nationally representative sample is required, Yonder has a number of different feasibility tools at its disposal when looking to evaluate the optimal methodology in each market. Firstly, we review the online panel sizes in each market in order to assess their ability to deliver a representative sample of the general public based on the local profile of age, gender and region. This analysis takes into consideration varying response rates for different age groups and cultural response factors in each market. Yonder also assesses the internet penetration in each market. Should the penetration be significantly low we would look into the reasons behind this and potentially explore offline alternatives depending on the outcome.

Quite often we expect internet access to be correlated with the size and maturity of online panels, however there are many exceptions. India for example has an internet penetration of around 35% (up from just 10% in 2011). The huge Indian population of nearly 1.4 billion means that online panels are plentiful, however with two thirds of the country living in rural locations where internet access is critically low (around 20%) there is a big question mark around how representative online surveys can really be. In these instances an experienced research agency should be able to provide all these facts and figures to enable research buyers to trade off representivity against cost and make an informed decision on methodology.



## Experience and expertise is key

I recently read an article on global research best practice which warned to 'expect the unexpected'. Now, while I have some degree of empathy with this view point I do feel that in providing high quality international research the onus is on researchers to identify and mitigate these 'unexpected events'. For example, at Yonder we take it upon ourselves to have a good understanding of the cultural challenges inherent in different markets, in terms of both demographic sample design restrictions and also types of questions which cannot be asked. Similarly understanding the dynamics of geography in key markets is essential to be able to conduct representative samples of the population online. Some markets only allow for research to be conducted in urban areas where internet access is available while in other markets there can be black spots in rural or isolated areas (e.g. deserts and jungles) which prevent fulfilment of the quota for that region.

Because there are so many moving parts with international research it is absolutely essential to have a robust system in place to handle the logistics for each market. The importance of being diligent and organised can never be under-estimated and the most experienced agencies will have comprehensive processes in place to manage this. We have been conducting international research at Yonder for well over a decade and over this period our operations team and the executive teams have devised and optimised systems which ensure the smooth running of global research from cultural considerations, visual scripting nuances, translation, localisation, and partner selection.

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We know that a large part of our time during the setup process will be spent reaching agreements with local offices with regards to appropriate sample design, language and subject matter restrictions. For example in Arab markets achieving a demographically balanced spread of gender is difficult due to cultural issues and references to sex or sexual orientation are not considered acceptable here. Similarly in China we can only realistically look to achieve coverage of main cities and urban areas when collecting data online and questions which seek to establish attitudes towards the government are not considered appropriate in this market. While some markets have grey areas around what can and can't be asked, for some markets the rules are very black and white. For example France has outlawed the collection of any data relating to race, ethnic origins or religion. While these might seem like micro issues in the overall management of international research they have the potential to cause serious damage to the data collection process, the quality of survey data and the reputation of both the client and the research agency if questions asked are considered rude or unlawful. An experienced research agency will have its finger on the pulse of the demographic, cultural, and legal nuances in each market and seamlessly address these issues within the methodology and questionnaire design.

While it might seem obvious, having a fuller appreciation of the nuances of working life in each market can be very helpful in ensuring research runs smoothly. This includes everything from time differences, working hours and public holidays through to the cultural differences around how and when different countries correspond.

Localisation of the survey is a very important stage in the questionnaire design and an experienced agency will always support this process. Presenting brands or stores which don't even exist in a particular country can be very confusing for respondents and have negative impact on the survey experience and data quality. Similarly, recognising that certain countries require very different ways of recording income, education, sexuality & marriage is essential. Yonder's experience together with support from our partner team on the ground in each market help ensure that all our questionnaires contain brand lists which are relevant and will be understood by respondents.



## Online surveys must be designed mobile-first

There is no hiding from the importance of mobile devices in the modern world. While in western markets, such as the UK, the proportion of mobile only households is increasing every year (2016 = 15% vs 2018 = 19% according to Ofcom), in many developing markets consumers often skip over landline entirely and go straight to mobile. Analysis of international online survey participation over the last 2 years at Yonder shows a 21 percentage point increase in the number of respondents choosing to open an emailed survey invitation on a mobile or tablet over the last 2 years (2016 = 14%; 2018 = 35%). A recent survey Yonder conducted in 35 markets showed that in many countries over half of the population are choosing mobile devices to complete surveys (Taiwan = 71%; Malaysia = 54%; Indonesia = 54%).

These figures serve to demonstrate just how important it is that international research design and project planning is 'mobile-first' in order to get the best from respondents. So is the industry adopting this mobile first approach? Well according to the 2017 Grit Report Q3-Q4 just half of agencies (50%) are designing surveys mobile first. At Yonder we have developed a proprietary tool which maps mobile devices to surveys and resizes images and text to fit devices correctly. It dynamically resizes by interrogating the device capabilities to find out what it does and does not support and alters the user experience accordingly. Beyond this technology there are a number of best practice approaches when it comes to international mobile device survey questionnaire design:

1

**KEEP THE SURVEY SHORT**

2

**ONLY ASK ONE QUESTION PER PAGE AND AVOID SCROLLING WHERE POSSIBLE**

3

**ASK SHORT SUCCINCT QUESTIONS**

4

**KEEP IMAGES SMALL AND VIDEOS SHORT**

5

**EMPLOY QUESTIONS WHICH FEEL NATURAL TO ANSWER USING A MOBILE DEVICE E.G. SLIDING RATING SCALES, DROP DOWN MENUS, CONVERTING GRIDS TO QUICK ROW-BY-ROW QUESTIONS**

Furthermore, by designing surveys which are device agnostic we can significantly open out the pool of potential respondents in certain markets where a laptop/desktop only survey would simply not be feasible. For example by taking a mobile-first approach in the African continent we are effectively opening up the ability to reach new markets which were previously only reachable via telephone or face to face.

Despite the continued growth and expansion of online panels, in the short term to medium term face to face and online methodologies will still have a role to play. In recent years some providers have been building panels of mobile handset users which are capable of delivering SMS/Text surveys in markets which were completely inaccessible previously using a mobile frustrating to the modern researcher as they are unable to handle complex routing or sophisticated behavioural or analytical data collection questions.

Traditional face to face and telephone surveys are normally favoured when online is not possible or when a high quality random probability sample of the general public is required. While the vast majority of international research these days is conducted online some markets are simply not accessible with this approach and an experienced agency should be able to recommend appropriate offline solutions which are best suited for specific markets. Yonder employ a network of ESOMAR member agencies in each market to deliver telephone and face to face research which are selected based on their relative strengths and sector expertise.

## Leveraging innovations internationally

At Yonder innovation sits at the heart of the business. Whether it be virtual reality, eye tracking, facial coding, implicit testing or biometrics, it is essential that the research tools can be scalable on a global level. Quite often substantial changes are needed to the design and delivery of certain techniques to ensure that the data received is of the very best quality.

Let's take implicit research as an example – a fairly simple speed based measure to understand respondents' automatic associations towards a brand, content or concept. In our proprietary version of this approach (the Implicit Response Test) we show stimulus followed by a descriptor and its antonym e.g. (Excited vs Bored) and the respondent uses the 'Z' & 'M' key on the keyboard to provide a response as fast as they can. The challenge with international research is that not all countries possess a QWERTY keyboard and therefore Yonder use '1' and '9' keys as a substitute for international research. Our mobile ready version of Implicit Response Test also ensures that we are able to achieve representative samples of desktop, tablet, and mobile phone respondents. In some markets mobile and tablet response times to an implicit exercise can be up to 20% slower while in other markets there is no difference. The Yonder analytics team normalise these type of effects where necessary to ensure that the proportion of people taking the survey on a mobile device does not serve to distort the findings.

When asking respondents about their feelings or emotions researchers have always tended to use word associations (happy, excited, bored, frustrated) or perhaps a 5 point scale for a range of written emotions. We know from psychology that human beings are hard wired to decode facial expressions from very early childhood. Furthermore, the ability to recognise and decode the meaning of facial expressions precedes human ability to use formal number systems (e.g. market research rating scales) and provides fundamental means for humans to communicate information such as emotions, motives and behavioural intentions, e.g. Darwin, 1872/1998<sup>1</sup>; Parkinson, 2005.<sup>2</sup> There is substantial evidence in academia that using emotions is more accurate as a measurement tool than market research scales e.g. McConnell, Dunn, Austin, and Rawn 2011<sup>3</sup> demonstrated that facial expressions regarding food preferences and food choices were a better predictor of future food choice behaviour.

As well as being a more accurate tool for communicating respondent feelings and emotions these types of non-verbal scales can also be used to tackle the differing response styles evident in international market research. Regardless of which country they reside in respondents will universally be able to identify with facial emotions which can serve to reduce the impact of unwanted answering styles. Furthermore, by simply showing an emotion on screen this effectively side steps the challenge that translators often face in identifying comparable native language words e.g. 'frustrated' or 'confused' which are easy to decode as a facial expressions but potentially challenging to translate in some markets. In studies where we require not just the emotion but the strength of that feeling we add

a follow-up question to measure intensity which adopts a more traditional scale in order to achieve that granular measure.

Yonder has developed a framework of non-verbal emotions based on Geneva Emotional Wheel.<sup>4</sup> These Caricatures were developed by working with an artist through an iterative basis and their accuracy were validated using a nationally representative omnibus survey. Yonder has successfully used this emotional measurement framework in a range of industries and project types. Yonder also have a paper published in the International Journal of Market Research<sup>5</sup> which outlines further information on our non-verbal design and application.



## Translation

Now I'm sure that you are not surprised to see a section on translation in this paper. High quality translation is often viewed as a hygiene factor – there is simply an assumption that it will be right. However, questionnaire translations are not simply correct or incorrect, there are numerous factors which play a role in their accuracy from individual translator preferences through to the rigour of quality checks completed.

History provides us with many examples of epic marketing translation fails by some of the world's largest and most respected brands names. In translating its original slogan "Pepsi brings you back to life" into Mandarin the resultant translation ended up meaning "Pepsi brings your ancestors back from the grave". Japanese manufacturer, Mazda, named its LaPutra car after the flying island in the book Gulliver's Travels by Jonathan Swift, but sadly this translated as "prostitute" in Spanish. Similarly the Spanish translation of the slogan "Turn it loose" for Brewery company Coors ended up being "Suffer from diarrhoea".



The complexity involved in the setup and management of international research is significant and it is therefore not surprising that I occasionally hear stories from clients and research industry colleagues about errors that occurred in global research delivery. Nine out of ten times these issues tend to be related to translation. The Yonder team are trained to identify potentially difficult translations based on our knowledge and experience. As you might expect a lot of the problematic words or phrases tend to be unique to western culture such as 'cool', 'wolf whistle', 'silly', 'cheesy'. There are however other, more commonly used words which we know translators have difficulty with including 'insight', 'fair', and 'multitasking' and these considerations are always front of mind when designing international surveys.

Yonder takes questionnaire translation very seriously and we understand that taking time and care in this area is essential to ensure that accurate and meaningful data is collected. In our view the 'must haves' when it comes it comes to translation are:

- Translators SHOULD comply with recognised industry standards (BS EN 15038) which offer reassurance about the quality of the processes
- Translators SHOULD be native speakers
- Translators SHOULD have all their translation work quality checked and edited by a second native speaking translator
- Translation companies SHOULD have specialist sector expertise such as healthcare, financial services or politics to ensure they understand the subject matter and are engaged with the issues
- Translators SHOULD understand and be experienced in handling sensitive or cultural issues as part of the translation service
- Translators SHOULD quality check across markets to ensure that key questions have been translated in a consistent manner

Given the impact that just one incorrectly translated word can have in international research we feel that the additional investment required in order to achieve quality translation is well worth it

<sup>1</sup> Darwin, C. R. 1872. The expression of the emotions in man and animals. London: John Murray. 1st edition.

<sup>2</sup> Parkinson, 2005. Do Facial Movements Express Emotions or Communicate Motives?

<sup>3</sup> McConnell, Dunn, Austin, and Rawn 2011. Blind spots in the search for happiness: Implicit attitudes and nonverbal leakage predict affective forecasting errors.

<sup>4</sup> <https://www.affective-sciences.org/gew/>

<sup>5</sup> International Journal of Market Research Vol 5, Issue 5 2016 on measuring the emotional impact using non-verbal scales.

## Rigorous quality controls are fundamental to success

The final 2017 GRIT report Q3-Q4 showed that ‘data quality’ was ranked the most important reason for selecting a research partner. While I hoped this would be the case I was somewhat surprised as we have noticed that for many research buyers the quality controls which are built into global surveys have become somewhat of a hygiene factor. We are regularly asked for the largest sample size for the cheapest price in the shortest time – quality doesn’t often get a mention. It is simply expected that international research suppliers will take measures to ensure the accuracy of data collection meets a certain standard. However, the proliferation of DIY survey tools and the desire for “data quickly and cheap” means that many research providers are taking short cuts on data quality.

I recently reviewed data from a small online global study that a financial client of mine commissioned with a low cost agency. The survey sought to measure appeal of a new banking proposition and was a 15 minute survey. Exploration of the data revealed that 41% of the sample had completed the survey in under 5 minutes, 29% in ten minutes and 20% in 15 minutes or more. The impact that this had on overall appeal was fairly catastrophic with those completing quickly being extremely positive and those completing in 15 minutes or more being considerably more negative. The overall appeal of the proposition stood at 49%, however in the context of speed of response this figure was completely meaningless.

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Hygiene factor or not, Yonder put quality controls front and center as we know they are the cornerstone of successful international research. All our international online studies include:

- Compliance with Yonder logic check questions to ensure that respondents are fully engaged and concentrating
- Time delay on all questions to ensure respondents read questions carefully
- Analysis of answering speed and patterns to ensure respondents do not consistently answer questions in the same position i.e. ‘straight lining’ or speeding through
- Daily review of topline data and inbuilt feedback question to ensure surveys are running smoothly along with a review of time-outs to detect any difficult/ problematic questions

While many agencies and panel companies employ these types of quality control elements it is Yonder’ logic check questions which set us apart as these questions have specifically been designed to work across different markets and cultures. Uniquely Yonder employ a suite of 18 different quality check questions in all our online surveys. We ask questions which are factual in nature both at the front and then (asked in a slightly different way) at the back of the survey. For example we might ask how many people in total in the household at the beginning and then at the end ask how many people are aged under 18 and how many are 18 or over. Those respondents who give conflicting answers are informed that their data will not be used and they will not receive an incentive. The principle being that if respondents cannot correctly answer the quality control questions then the accuracy of the other questions in the survey are also deemed unreliable.

The effect this has had on our proprietary panels has been very positive with respondents accepting that they must focus and give full concentration to the answers they provide. On a typical survey around 5% will fail the quality controls on our proprietary panels, however when we partner with international panel companies the failures tend to be in the range 10% - 50%. A recent survey we conducted on the subject of smartphones in Argentina saw over 50% fail the quality controls. As a researcher this level of quality fails is frightening, as any client who walked away with a set of data that contained this many inconsistencies is destined to make uninformed and most likely inaccurate business decisions.

Quite often multiple sample sources or partner panels need to be used in order to reach the required number of interviews in certain countries. We know that online panels can be recruited and managed in very different ways so it is essential that all respondents are required to undertake and pass our quality controls to help ensure that we achieve a consistently high quality response.



## Making sense of international data

One of the big challenges in conducting international market research is the differing response styles that are inherent within various countries and the extent to which this can contaminate findings. Most researchers are now very aware that some markets have a tendency to give differing patterns of response such as China, Brazil, India, Japan and Mexico.

These different response styles are well documented in academic literature, in particular Baumgartner and Steenkamp 2001 identified 7 different response patterns having conducted their own international research experiments. Three worth highlighting are Acquiescence Response Style (ARS), Extreme Response Style (ERS), and Midpoint Responding (MPR). ARS describes a tendency for always agreeing and being particularly positive, ERS describes a respondent who selects the extreme ends of a scale, while someone who is involved in MPR has a tendency to select the middle scale category of a question.

Yonder has observed elements of ARS and ERS in particular in China and India. The extent of the response style tends to depend on the subject matter, however we have seen aspects of positivity and extreme scale usage when conducting new product development research and also when exploring consumer appetite for future technology that could impact their lives. Answering styles in Japan tend to exhibit evasiveness, indecision, or indifference which are common traits of MPR.

The Yonder team tackle different response styles head on and use our extensive selection of online survey design tools together with decades of experience in carefully crafting questions to help minimise the impact response bias can have on survey data. For example there is evidence that using a semantic label for each point on the scale rather than only defining both ends can help reduce ARS and ERS for international research. Furthermore, sliding scales and longer 7 or 10 point scales can help tackle the impact that MPR has on international data.

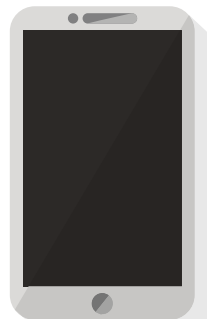
Agencies that conduct international research should have a comprehensive understanding of normalisation approaches, as well as when and how to deploy these techniques. Organisations which simply pass on data without giving consideration to these issues leave themselves and their client open to misinterpretation of the findings and faulty insights.

At Yonder we have specialist statisticians and data scientists who are experienced in calibrating data and dealing with the issue of scale usage across different cultures and countries. It is key to differentiate between attitudinal and behavioural data when analysing different patterns of scale usage as these manifest themselves in different ways.

Yonder apply our expertise and specialist knowledge in this area and employ techniques which can be implemented in the survey design stage as well as in the analysis stage which remove or mitigate against cultural scale effects. This is mainly achieved through a process of ‘normalising’ or ‘centering’ data across markets, but needs to be carefully calculated and applied to ensure it has the desired effect of removing the cultural biases and not just removing all interesting differences in the data.

It is particularly important to distinguish cultural scale usage effects, typically observed in attitudinal questions, with ‘real’ differences observed when asking objective or behavioural questions. These need to be treated in very different ways and only after careful analysis of the distribution of the data as well as an understanding of the objectives of each study. Where batteries of attitudinal questions have been asked across countries we apply an approach which compares distributions of responses between those countries and removes differences attributable to those country effects.

An example of this technique previously undertaken by our analytics team involved the normalisation of mobile phone texts, voice calls, data usage and spend into high, medium and low bands. Each individual market had its own unique distribution of usage which needed to be firstly analysed and mapped into usage bands for each strand of mobile communication. This adjustment was conducted for every market to ensure that the band distributions were reflective of the relative usage within each market as opposed to applying a blanket rule across all markets which would have ignored cultural/behavioural usage factors.





## International qualitative capabilities

Successful international qualitative research shares many characteristics with effective global quantitative work – from cultural understanding to market reach. At Yonder we have extensive experience of running multi-country qualitative projects across Europe, Asia, US, LATAM and Africa on subjects as diverse as educational product development and deodorant advertising. We can run global projects using a wide range of approaches from classic focus groups, ethnography, online communities and co-creation. Whatever the methodology, we believe that great international qual is all about five key factors: central control and co-ordination; trusted local partners with local knowledge; ideally visiting markets in-person; effectively engaging global and local stakeholders; having a flexible but central analysis framework.

### CENTRAL CONTROL

Yonder design all guides and materials, brief local partners, monitor fieldwork and supply analysis templates, in discussion and co-ordination with our global clients.

### TRIED AND TRUSTED PARTNERS WITH LOCAL KNOWLEDGE

We work with local partner agencies, in many cases relationships that have been developed over many years. It's really important to empower the local partner to input into the approach in terms of process and content to fit the local market. This can be everything from timing of sessions through the types of “projective techniques” that are culturally appropriate to market-specific questions to nuanced cultural interpretation of results.

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### VISIT MARKETS IN-PERSON

We try to visit all markets in-person, if at all possible – there is a wealth of intuitive and actual material that can be gleaned from a visit that is not accessible any other way (the difference between hiking down into the Grand Canyon vs looking at pictures on Google). However if timing or budget don't allow then we will view sessions remotely (via video streaming) and pause for refinement after the first session.

### GLOBAL AND LOCAL STAKEHOLDER INVOLVEMENT

In global projects it is often really important to ensure that global and local stakeholders are involved. The local team often need to be consulted to ensure we get the most from their local knowledge and to get their buy-in, but central control should be retained over the content and execution of the research. Thus we always take a lead from the central client team as to how best to work with their local colleagues to ensure the research is locally engaging and nuanced but remains on strategy.

### FLEXIBLE ANALYSIS FRAMEWORK

We co-ordinate analysis and reporting centrally but provide an analysis framework for local partners to make cross-country comparisons possible, allowing plenty of room for the local perspective so that the result is both strategic and nuanced, useful and authentic.

The best global qual projects blend all of these various features to deliver effectively and efficiently against the project objectives.



## Final thoughts

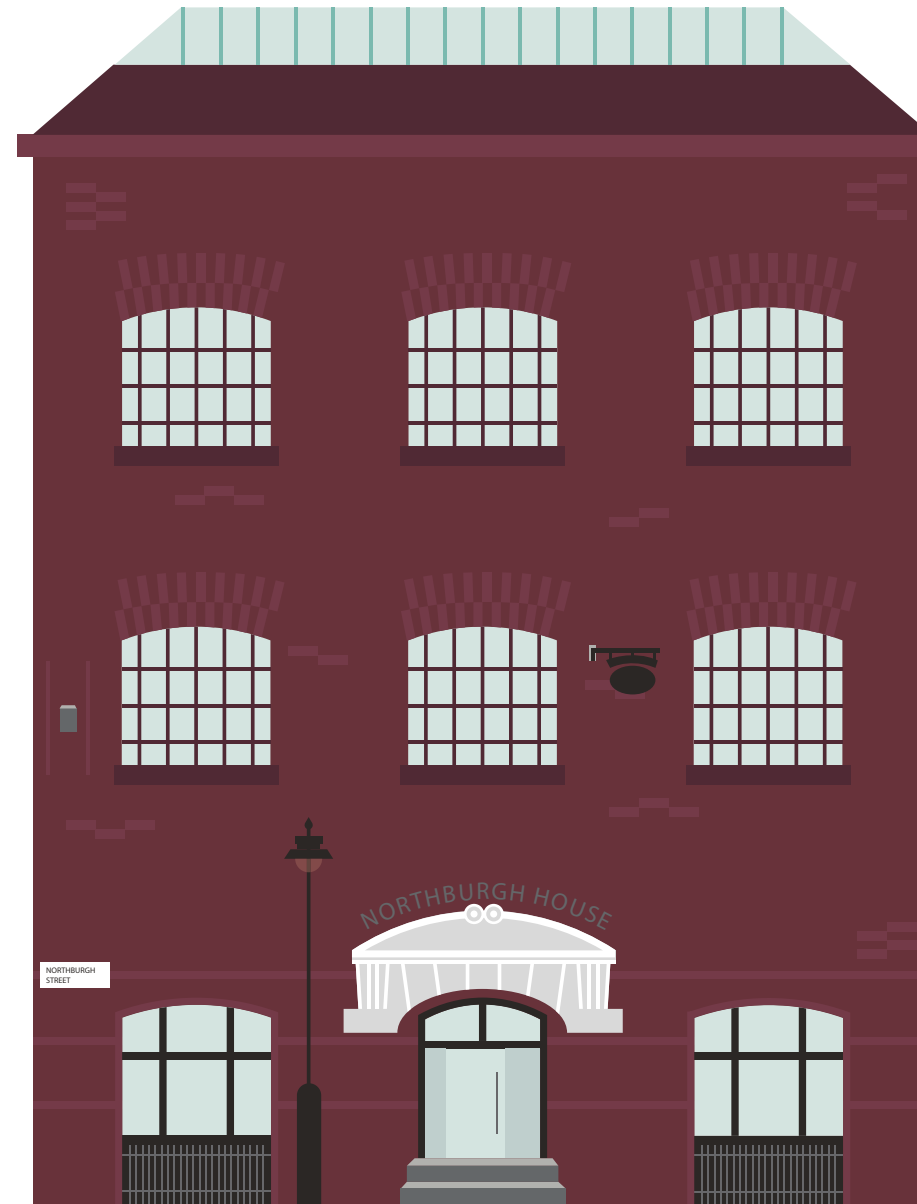
There is continual pressure for faster, more innovative and more complex international research. These demands make the likelihood of something going wrong higher, therefore, making it even more important that quality is not compromised at any point in the process. There will be a premium to pay for research agencies that can deliver to all of the points I have raised here. It is up to you to decide whether this premium is worth it but when the alternative is to make decisions on unreliable data surely it is. Isn't it?



## About Yonder

Yonder is a consultancy that blends insight, strategy & imagination to help clients unlock opportunity and deliver customer-driven success. Yonder is a trusted adviser to some of the UK's biggest companies, brands and individuals. Our work helps them to respond to changing market dynamics across industries and geographies, and maintain the momentum businesses need to succeed in today's world, and the future.

Yonder conducts research on over 75 countries worldwide for organisations such as Amazon, BBC, Costa Coffee, Lane Crawford, the Premier League and RBS.



## About the author

Chris Menzies is a Director at Yonder. Considered the “international guru” Chris has over 15 years’ experience and has conducted thousands of international projects. Chris has managed many complex and challenging projects throughout his career and has a detailed understanding of the pitfalls that exist along the international research journey. Chris has conducted international research in over 60 countries for commercial businesses, charities, and governments. He is passionate about delivering high quality international research that can be trusted and enjoys the challenge of delivering new and innovative research on a global level. Chris is the ideal person to help you navigate the tricky waters of international research.

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