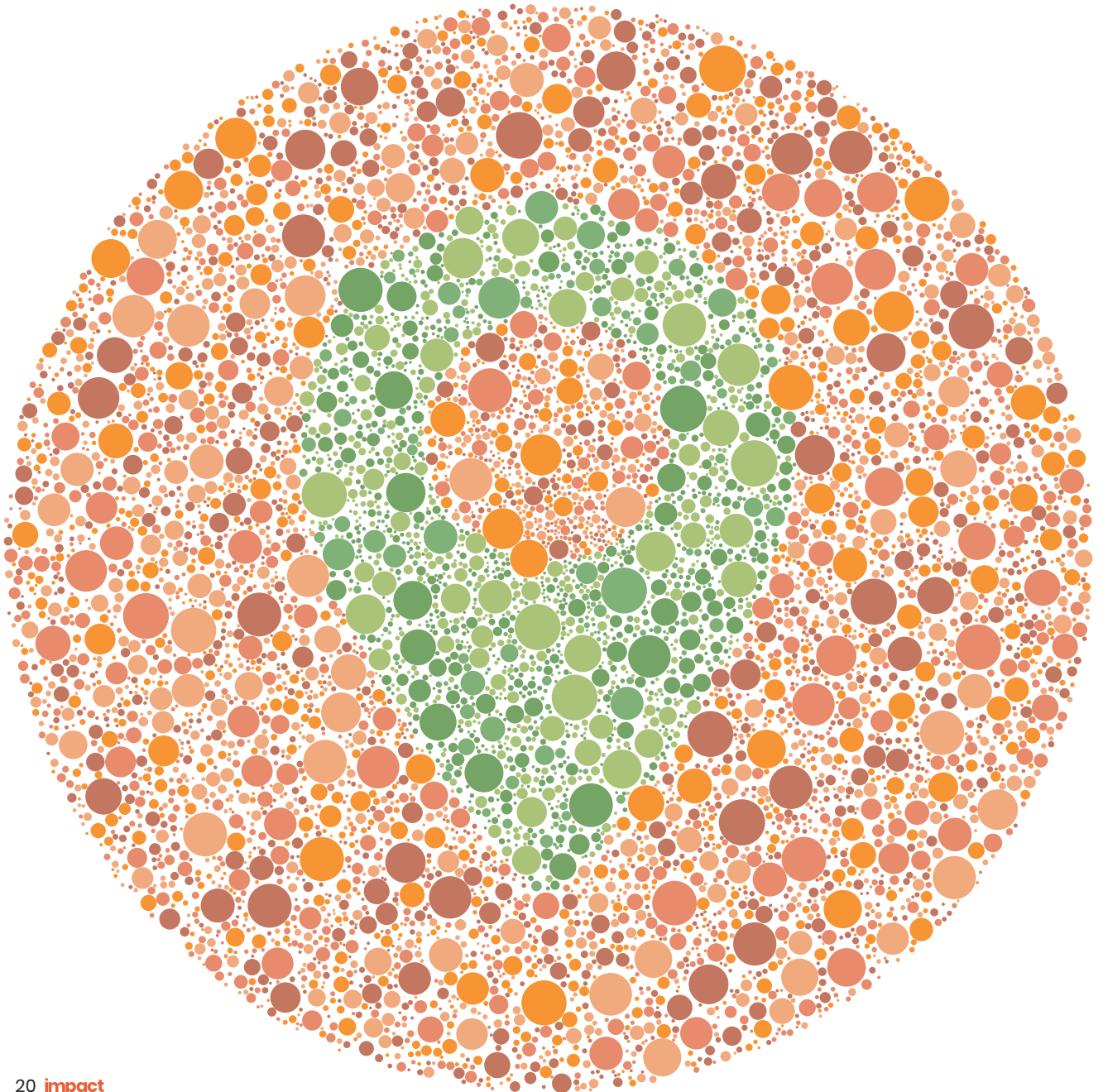


# Staying local, going global





**The balance of globalisation has shifted in the past 20 years. For brands looking to target international efforts and evaluate opportunities at a global scale, tailoring their market research to local nuance is a vital first step. By Richard Young**

**T**he global economy is here to stay. But 2020 taught us that, within that global picture, local markets evolve unevenly, unpredictably and are subject to rapid change. That's made multi-market insights even more essential for global brands and those planning to expand internationally as we enter a new era for regional trade relationships.

Finding the right balance between local insights and global uniformity is hard. The marketing history books are littered with examples of a basic failure to localise, often with hilarious consequences [see boxout overleaf, 'What's in a name?']. More seriously, global brands face a challenge: ensure research controls for cultural, language and infrastructure differences, but also generate insights that can be benchmarked across markets and aggregated to inform global decisions.

"As a global brand, you want to use the same product and the same campaign everywhere," says Stephen Phillips, chief executive at Zappi. "You need to know how many compromises are worth making. Sometimes they're too numerous; lots of global beer companies simply end up buying local brewers - they're not even trying to push global brands too much. Local research tells them the economies of scale are in distribution, not marketing."

Local research also depends on national culture and the nuances of local language and dialects. So how can organisations ensure their

research is providing reliable insights even on a local scale, much less informing global decisions?

"When a global brand puts forward a research hypothesis, we look to recontextualise it for individual markets, not just talk about the language," says Ruth Partington, founder and chief executive of Empower Translate. "Equally, you have to look at how to take local outputs and fit them into a balanced global interpretation."

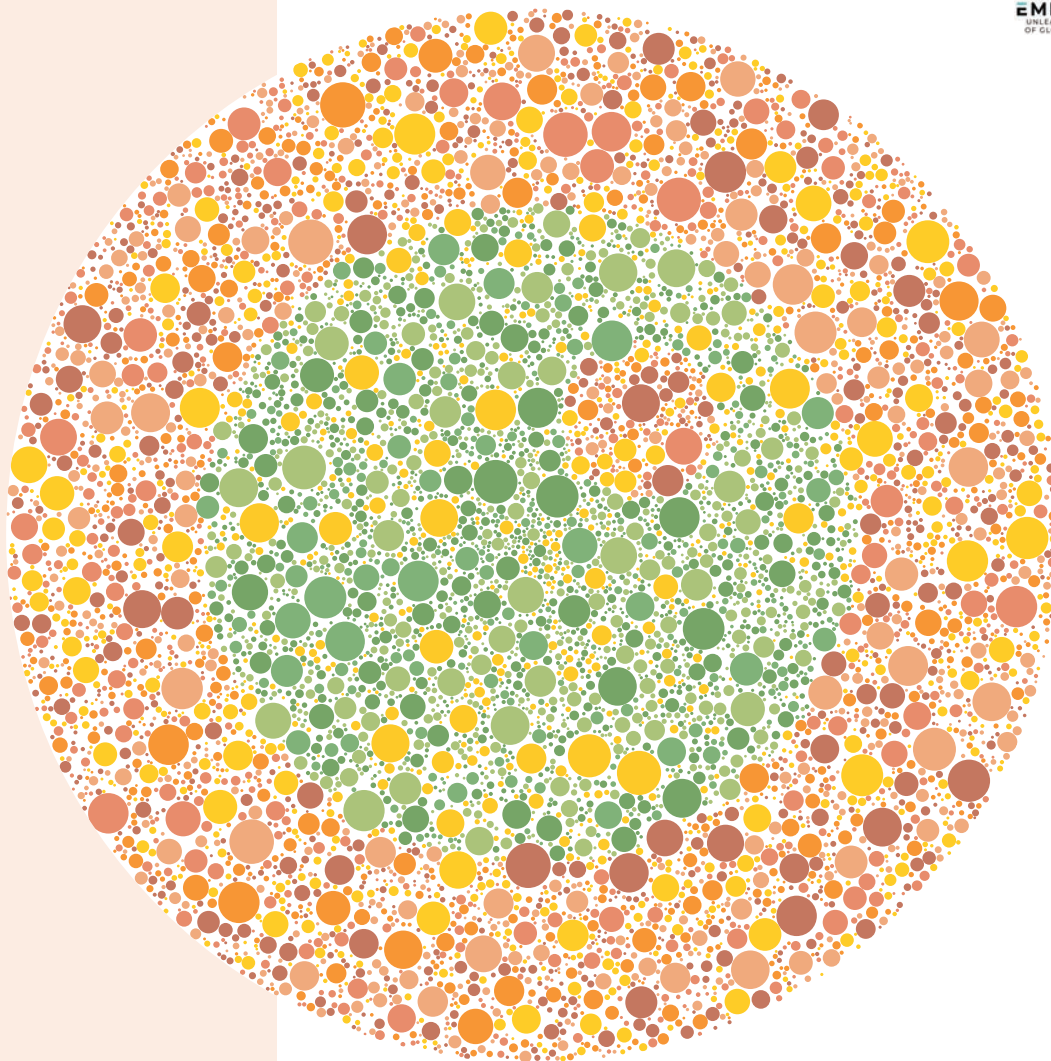
At the most basic level, research needs to establish how a brand can operate in a given locality. Parves Khan, global research and insight director at educational publisher Pearson, says the local/global split is defined by two issues. "First, infrastructure. The rate of adoption of devices and quality of connectivity in each market is a huge factor for us. In some, we'll need to tailor a more light-touch experience; in others, we can roll out more data-intensive products that are demanding on bandwidth and storage."

Then there's culture. "In some countries, providing something exclusively online just won't do," Khan explains. "People want the option of face-to-face learning, so you have to pursue a blended approach. But some products are only available online, and some are still purely in print. So, we need to test assumptions around those cultural biases, too."

Those two factors - determining how a brand can operate and understanding culture - also define the kind of research you can do in each locality, and how to interpret

**"You have to look at how to take local outputs and fit them into a balanced global interpretation"**





## What's in a name?

Oil of Ulay became Olay. Marathon turned into Snickers. Opal Fruits changed into Starburst. Global corporations love to create uniformity in their brand names and marketing campaigns, usually to reduce costs. The problem is, they sometimes translate rather unfortunately. Here are a few from the marketing archives – which perhaps might have been avoided with some good local research.

- Clairol had a curling iron called Mist Stick. Unfortunately, in German, 'mist' is slang for manure. Vicks had a problem in the country as the German 'v' is sounded 'f', making 'Vicks' slang for sexual intercourse.

- Coors' slogan 'Turn it loose', when translated into Spanish, is a colloquial term for having diarrhoea, while the American Dairy Association's 'Got milk?' campaign translated into 'Are you lactating?' in Spanish-speaking nations.
- Ford's Pinto model didn't go down well in Brazil, where it's a slang term for 'tiny male genitals'. Mitsubishi had to change its Pajero brand in Spanish-speaking countries, where it was understood as 'masturbator'.
- KFC is known globally for being 'finger-licking good' – which translated as 'eat your fingers off' in China. Also stung there was Mercedes-Benz; a Mandarin-ised

version of the brand, 'Bensi', means 'rush to die'. And global slogan 'Pepsi brings you back to life' appeared in China as 'Pepsi brings you back from the grave'.

Some brands get it right. Locally produced signs for Coca-Cola ('ko-ka-ko-la'), when it was first sold in China, were sometimes translated as 'bite the wax tadpole' or 'female horse fastened with wax'. But the company was already developing a local brand, settling on the symbols 'K'o-K'ou-K'o-lé' – which means 'to allow the mouth to be able to rejoice' – a far more apt trademark that it registered in 1928.

it. “It’s rarely a plug-and-play solution in every market,” says Phil Steggals, global head of research and strategy at Kadence International. “You need to know what kind of insight the client is looking for, as well as having the local context and experience. Then it’s about managing the expectations on both sides.”

Additionally, there’s a “big difference” between assessing existing markets and expanding into new ones, according to Fiona Blades, chief experience officer at Mesh Experience. “In that case, there’s much more onus on the agency to have their own local presence, to ensure that context is provided.”

### Taming the methodology

Methodologies must be tailored for each market, and that isn’t a fixed target, says Steggals, citing Indonesia as an example. “People were happy to speak on the street in a way that would be almost impossible for a researcher in London, but they didn’t like phone research. Then there was a switch to smartphones and, suddenly, research on mobiles took off, and people were happy to give data and download apps, even while they were still reluctant to do phone interviews.”

Times change, then – but, often, history has a bearing on the local perceptions of different methodologies. “In eastern Germany, for example, the folk memory of the Stasi runs deep – there’s a suspicion of people asking questions, even via anonymous questionnaires,” says Bianca Abulafia, global head of qualitative at Kadence. “So while your discussion guide might have the same

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**“Having that cultural touch is more than just knowing what questions are pertinent; it’s knowing how the client will use the information”**  
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key points in it, for Germany, you might gently lead into more personal questions; then, in France, there are lots of things you’re simply not allowed to ask, around race, gender and religion.”

That can make it hard for the methodology to deliver comparable

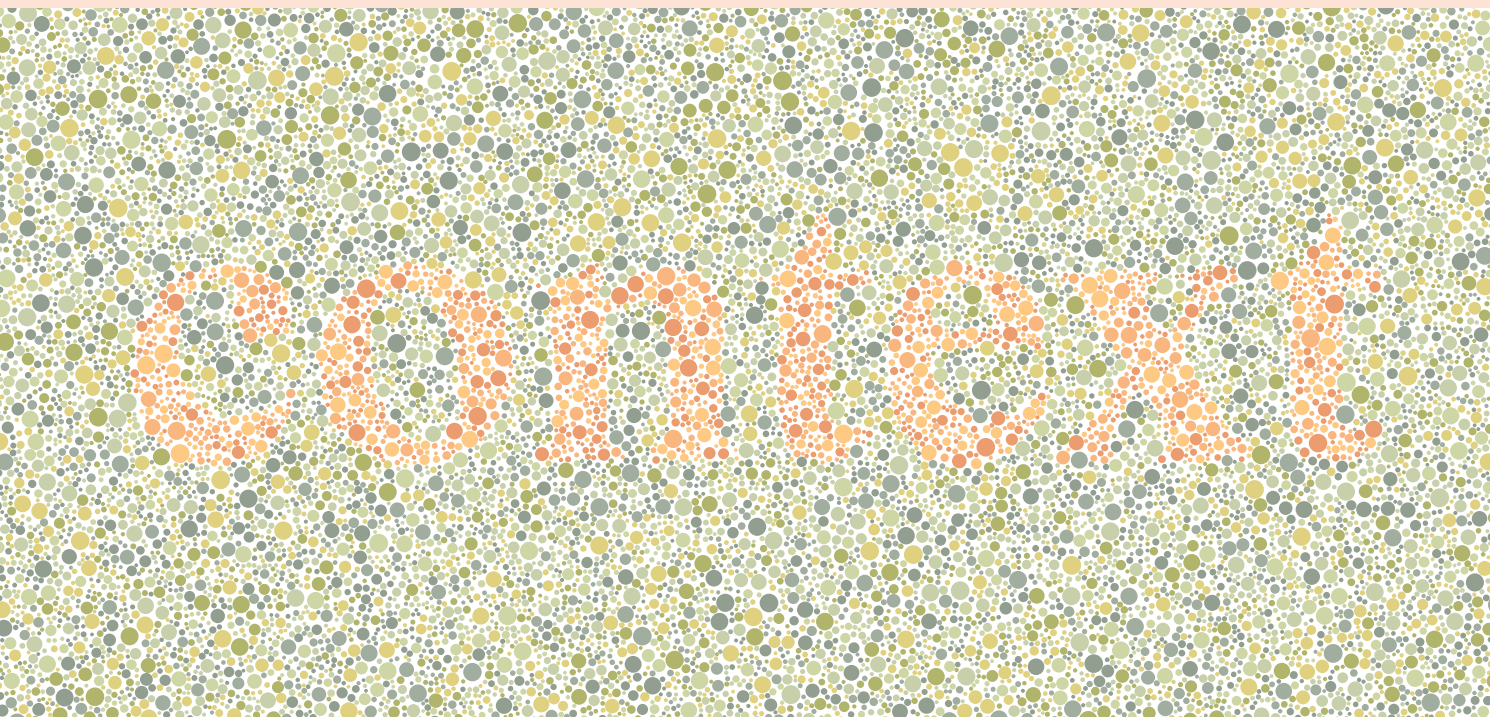
data. “If you want quant in different markets, we often suggest doing in-depth qual first to dig under the surface,” she continues. “We worked on a project in Saudi Arabia, looking into the popularity of shows that might have been frowned upon in some quarters. Running quant would only have got the client so far – there needed to be research to warm up the respondent community, build trust, and then dig into the context for their preferences.”

### Context is all

Sensitivity to all these issues is hard won. Mesh Experience has offices around the world, but Covid-19 restrictions on travel – and the rise of more digital qual during lockdowns – has affected the ability of research teams to go ‘in country’.

“The challenge is that, if you’re asking someone from overseas to do work remotely, do they have the right context?” asks Blades. “Are they seeing the current ads on TV or billboards? Do they know the subtleties of the local brand associations? Having that cultural touch is more than just knowing what questions are pertinent. A big part of it is knowing how the client will use the information you’re generating.”

More fundamentally, will a global client get the nuances of local fieldwork? “Understanding why emotions are





triggered in different cultures or regions is really important,” says Clare Partington, marketing manager at Empower Translate. “So, while machine translation, for example, is getting good, it loses the subtlety; it struggles with idioms; it misses the emotional salience that’s important to both qual and even quant research.”

A participant might quote a local nursery rhyme in a focus group, for example. A local might pick up a lot of meaning; a foreign translator might understand the context; but a machine translation is just going to give a verbatim that lacks any meaning. If you have a quant project looking at keyword frequency, maybe that’s less important; for a qual project, that might skew your insights badly.

Localisation isn’t just about translation services, either – which is where awareness of both culture and infrastructure come back in. “For example, we helped on a study looking into equipping hospital rooms,” says Ruth Partington. “French and German focus groups expressed some quite different views – which only made sense when contextualised against the décor and arrangement of the typical rooms in each country.”

### Global, regional, local?

There’s a political dimension to all this, too; to avoid tensions between global, regional and local teams, engagement is key. “People in many markets are really not that happy to be lumped into a regional hub by global brands, much less

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**“People in many markets are really not that happy to be lumped into a regional hub by global brands”**  
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subsumed into a global perspective,” says Phillips. “An insight solution across 37 countries looks brilliant to a global team. Then you come back a couple of months later and it turns out the client team in Poland had some compelling reason not to use a particular part of the methodology, or the Romanian team wants to work with a local agency... it can be a battle.”

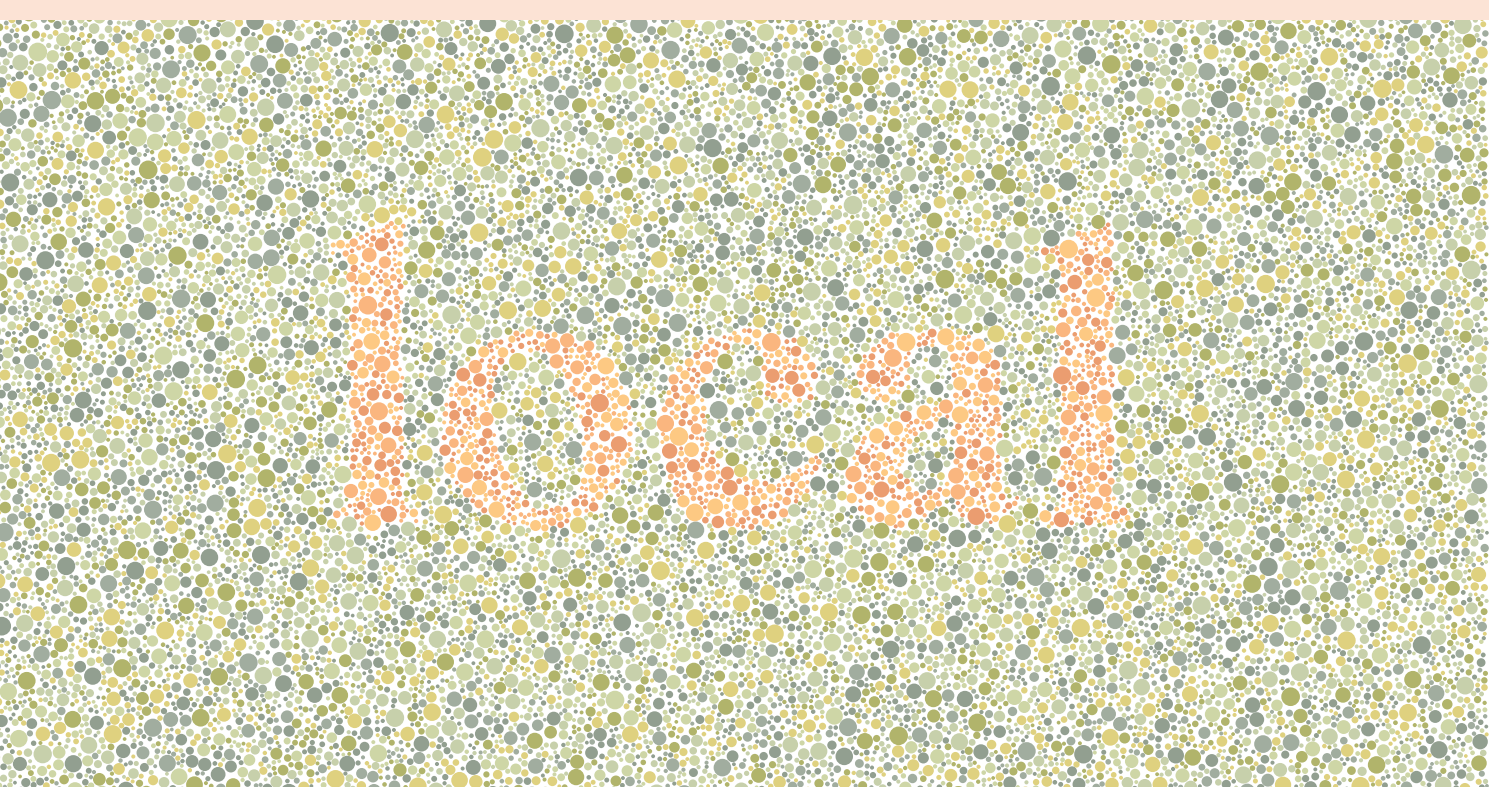
While some brands devolve a lot of autonomy to regional and national teams, others have stricter expectations, notes Steggals.

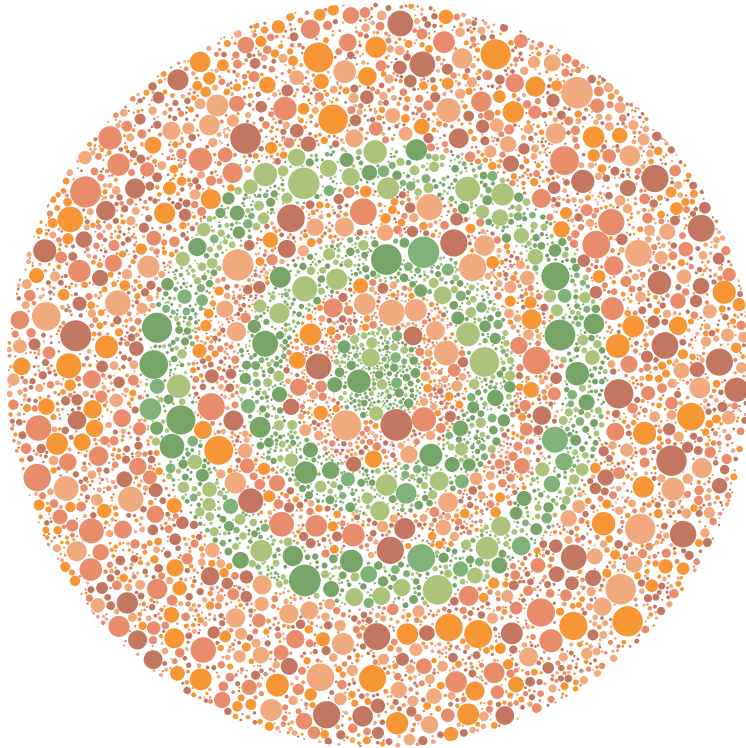
According to Blades, some global clients haven’t been able to do the foundational work needed to create a broader context for local research this year.

“At the local level, client teams are much more focused, for obvious reasons, on short- and medium-term changes to their own markets,” says Blades. “Finding value for a global project is often about talking to those locals. If you have good relations with, say, a French client, you can probe for context, you can explore what parallels might be found to other markets.”

### How Covid-19 skews local

Globalisation isn’t a one-way street, with trade barriers being erected around key markets and a cultural-identity politics seeping into brand consciousness. Covid-19 restrictions have further focused people on their locality. According to research conducted by Dipsticks Research Group for Posterscope in September, 64%





of respondents said it has made them realise the importance of their local high street, while 50% believe they have created a stronger emotional tie with their local community.

“We’ve seen an even more significant drive towards tighter levels of localisation, partly as a result of lockdowns,” says Ruth Partington. “With public sector work, for example, the need for national governments to work with their local communities in more precise and well-calibrated ways has become even greater.”

A rise in localism has accelerated support for local brands and produce during the pandemic, while platforms and networks have emerged to connect communities in new ways (community Facebook groups, Nextdoor, street-level WhatsApp groups, and food-sharing apps, such as Olio). Understanding how these interactions affect consumer decisions has been a major challenge for many organisations.

“People feel a lot more engaged with how brands behave and what their impact is locally,” adds Ruth Partington. “An issue such as Black Lives Matter feels universal in a brand context – but understanding what it means for someone in Italy compared with, say, Indiana is vital. We have this heightened sense of the importance of understanding people’s fears and motivations against what might seem very universal trends.”

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Covid-19 pain-points are an obvious area for focus. There's a need for granular insights in the healthcare and education markets, for example – sectors in which global trends are filtered heavily by local infrastructure and sentiment. The changes wrought by the pandemic are also forcing providers in those sectors to change more rapidly.

Khan says the pandemic accelerated Pearson's digital transformation. "All the products in our digital roadmap had to be brought forward, and that meant we needed to test the appetite for online learning much more keenly in the wake of the pandemic. At the same time, we also had to shift to almost exclusively online research – and that kind of pivot leaves you with a bunch of questions about methodology."

While some clients, like Khan, have doubts about

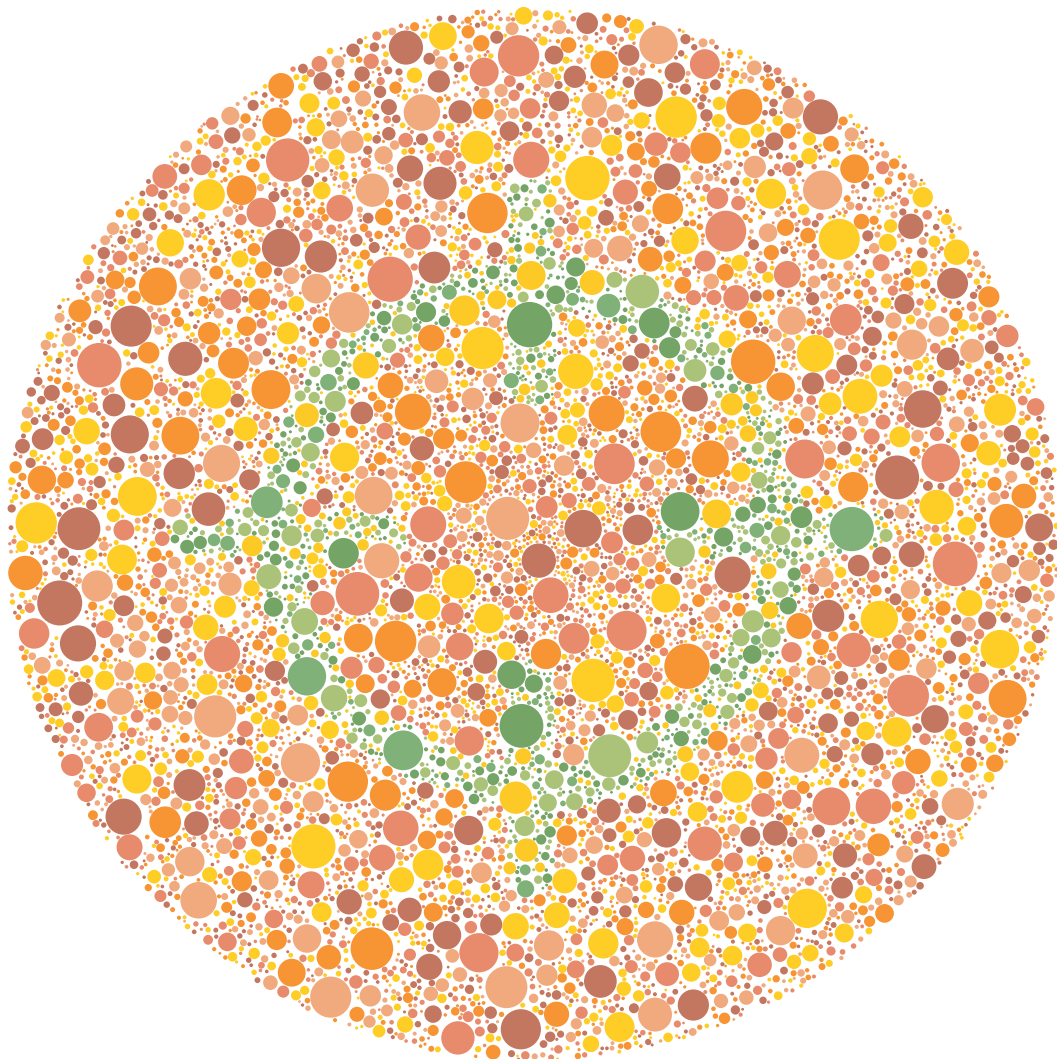
videoconference focus groups and long for a return to face-to-face – partly as a way of sense-checking other methodologies in different markets – the rise of Zoom has broken down some barriers between localities.

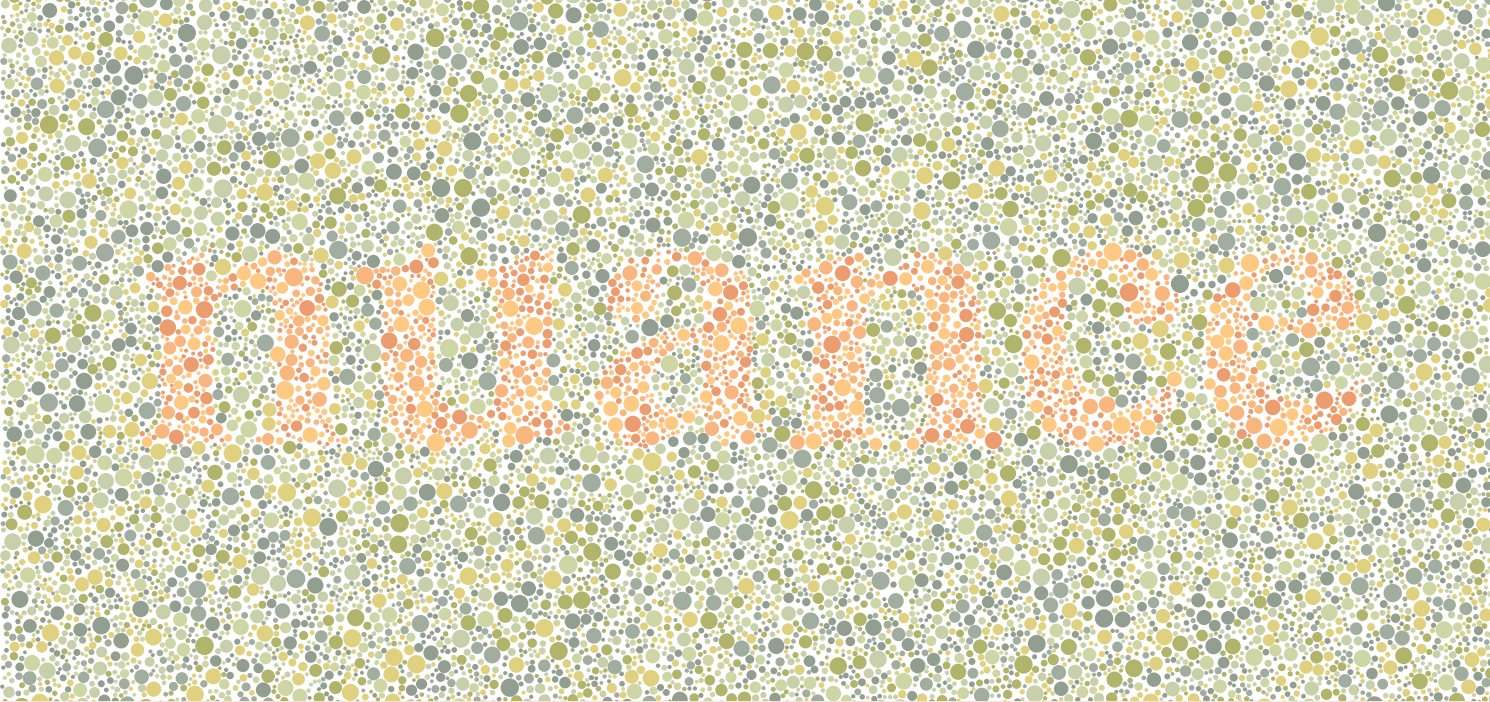
### **"Same, same... but different"**

Everyone we spoke to for this report talked about the risk of using points scales for quant across different markets, and trying to contextualise scores against national norms. (In China, middling scores are positive; in Indonesia, everyone loves everything.)

It's particularly important for large global brands with a set idea of how they approach their brand equity or new product development studies, according to Abulafia. "The alternative is to develop a more organic approach, so that the question set allows you to reflect local nuance. It might be as

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**"Having a local panel provider means you can get speed into those projects without sacrificing quality of insight"**  
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simple as using a 100-point scale instead of a five-point scale,” she says.

For Pearson’s Khan, sensitivity to local conditions is a balancing act. On the one hand, the product isn’t going to vary all that much, and neither are the core drivers of the audience. Pricing questions are crucial, however.

“Teachers in Indonesia and Minnesota aren’t that different from each other,” she says. “Their basic needs and motivations are pretty similar – at least in the education market.

“But I’ve always been interested in how ‘willingness to please’ varies in different markets. In some localities, it feels like people are predisposed to be positive. Is it respect for big companies? Is it people inflating their spending power – and willingness to spend on education – to feel good? Would they really buy at the price points they suggest?”

Just because local research might be tailored, that doesn’t make it irrelevant to a global strategy. “It requires you to ask, carefully, can we translate local insights into a general picture?” says Blades. “Can you take insights from one country and ask how it might help you in other cultures? Does it show you where you might tweak methodology in that other country to uncover similar insights? If you can validate against your understanding of the other markets, it can be a valuable tool.”

Technology does hold out the hope of refining that global/local tension. “We try to build a standardised core and flexible outer,” says Zappi’s Phillips.

“With a tracker, you have a module that’s standardised and comparable across all markets, then there are optional modules to bolt on, and some that are, themselves, flexible within certain parameters. But that’s not always an easy thing to deliver.”

## Experience counts

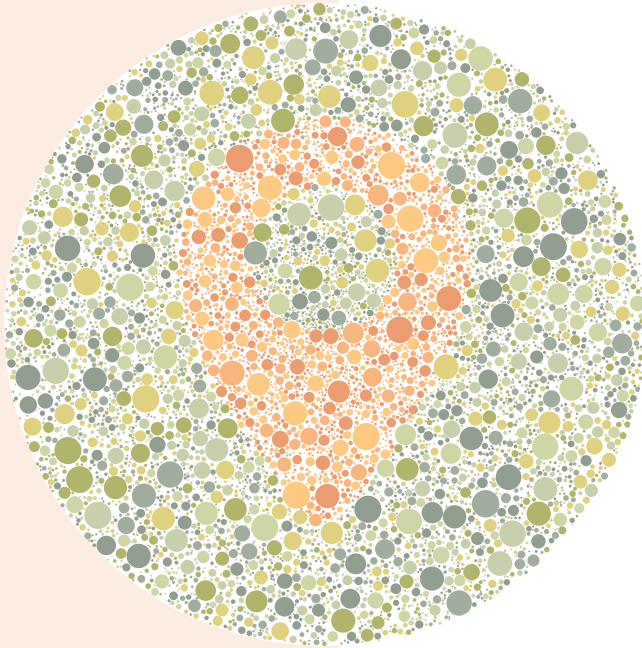
For research teams with a local presence or partners in a country, it is easier to adjust for regional and local variances in scores or emotional reactions. “Having tried and tested partners in place in your key markets is a huge advantage,” says Ruth Partington. “That’s not just about translation – having a local panel provider or community platform host is key. It means you can get the speed into those projects without sacrificing quality of insight.”

Khan has felt that particularly keenly on a project to evaluate a high-end distance-learning package that Pearson is selling into high net-worth Asian and Middle Eastern markets – and given what happened in 2020, speed has been critical. “Traditionally, we’d have sent people out to recruit parents, literally outside the schools that fit the profile,” she says. “That’s obviously not possible with the pandemic, but the online panel providers we use are going to struggle with that kind of specialist target. Luckily, we found one – Rakuten – that specialises in precisely that kind of market.”

This hints at a kind of flexibility that comes with the territory (pun intended) of trusted third parties. “You don’t always need to have a global footprint – you can usually find local people to work with you and build strong local insight that way,” says Blades. “Some would argue it’s a much more agile way of working at a time when that’s increasingly important.”

While working with great translation services is invaluable, Phillips stresses, new approaches open up when you have enough data to control for their meaning, too. “There’s a lot of work looking to explore things such as emoticons or other system 2 approaches, like facial coding, that ought to be more universal,” he says. “The critical thing is to do enough research that you can compare across hundreds of local studies to





## Deep localisation of insight: mission-critical or mission impossible?

Starbucks has 31,000 retail locations spanning the four corners of our world. Maybe that’s why I didn’t think twice in Valletta, Malta, last year when I noticed the global chain had set up shop on the historical waterfront.

What did catch my eye, though, was the ‘Specials’ billboard. Its proposition was vastly different from the Starbucks next to our hotel in Sliema, less than a mile away. It had been tailored to a different location, history and, apparently, clientele.

Localisation of marketing on this level is not revolutionary, especially in the highly visible fast-food and drink industry (look no further than McDonald’s), and the pandemic has accelerated this shift by intensifying consumer expectations of brand localisation. Indeed, Hall & Partners’ 2020 People Pulse survey identified how consumers across a number of global markets increasingly penalise brands that do not engage on a local community level.

What is unprecedented, however, is

a widescale reshaping of global research processes to support clients’ increasingly complex localisation requirements across all sectors. Generating insights that are rich enough to inform the increasingly preferred local-over-global approach to strategic decision-making across multiple markets is no mean feat considering the multitude of adjustments required at all levels of research. These include methodology, content, cultural nuances, salary bands, education levels, the gender question, regionalisation and adjusting for acquiescence skew/bias across markets – to name but a few.

In October 2020, Empower held the first insight localisation clinic for global researchers, to have meaningful dialogue around the barriers to generating much-needed, deeply local insights. We identified the luxuries that are not easy to come by in research: more time and more money. Yet, before working with (or

work out where your data lies. Without standardisation, it’s much harder to make comparisons.”

Trying to force hard-and-fast rules for generating or using insight across multiple markets is always likely to fall short. The solution is teamwork, according to Steggals. “Clients know their product or service better than anyone; we know the right questions and methodologies that will get them where they need to go; local teams understand the cultural norms; and the translations can bring it all together. But what decisions can you take off the back of local insight? What research approach is going to shape your decisions?”

What risks are brands taking if they fail to localise? For researchers in the UK, in particular – as they ponder the country’s new role on the world stage – the ability to respond to the whole world’s local issues might be invaluable. “Despite everything, it does still feel like the world is getting more global, not less,” says Blades. “The need for insights on global products, services and brands is still accelerating, especially in the digital space. We’ve never really bettered ‘think global, act local’ as a touchstone.”

persuading) clients to relieve those pressures, research teams also need to decide where the ‘burden of responsibility’ lies for desk research and actions required for deep localisation based on knowledge, skills and process.

During the course of the clinic, we produced several solutions for reshaping global research, including:

- 1.** Strengthening client relationships through expertise and engagement with the end goal of the research
- 2.** Establishing standard operating procedures that make clear from the outset with whom the responsibility lies for various localisation aspects, including desk research and content localisation
- 3.** Developing a centralised demographics catalogue containing salary bands, education levels, and so on, per market, to ease the burden of desk research.

● Ruth Partington is chief executive of Empower Translate