



# Masterclass about Cross-Cultural and Intercultural Business Research

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**1**

**Comparing across  
nations and cultures**



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- ✔ Compare: put side by side two objects to study their similarities and differences
  - ✔ Local business decisions are too often made on a dichotomous basis, either standardized or fully adapted.
  - ✔ However, similarities are too substantial and differences go too deep to be ignored.
  - ✔ The first presentation tries to articulate similarities and differences in local **consumer experience** across multiple contexts.
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- ☛ We generally compare cross-nationally or cross-culturally
  - ☛ Values, consumer behavior, retail, advertising, etc.
  - ☛ **Is the same research design appropriate for the discovery of both similarities and differences across groups?**
  - ☛ Examples: time-styles, business goals, COO-product ethnicity, trust across-cultures, Website design across countries and culture, ...
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# Is it similar or different?

Actual versus perceived similarities/differences

- ☛ Qualitative and/or *multi-emic* research designs favor the discovery of differences because they emphasize local meaning and interpretation
- ☛ Quantitative and/or *etic* research design favor similarities because they assume shared concepts
- ☛ Differences in *nature* (no common measures) versus differences in *degree* (common measures)
- ☛ Qualitative research works as a magnifying glass and may overestimate differences in nature

# An example based on meaningful categories for persuasive discourse (negotiation, leadership, superior-subordinate interactions, advertising, sales)

- ☞ Western, ‘Aristotelian’ *pathos and logos*
- ☞ Chinese Confucian *qing* (emotion) and *li* (reason)
- ☞ There are certainly key differences
- ☞ However, it is mainly in the combination and the contextualisation of such concepts in business practice that meaningful differences are to be discovered

# Geertz about differences and similarities

“The differences *do* go far deeper than an easy men-are-men humanism permits itself to see, and the similarities *are* far too substantial for an easy other-beasts, other-mores relativism to dissolve.” (Geertz, 1983, p. 41)

He explains thick description, as follows: “... the essential task of theory building here is not to codify abstract regularities but to make thick description possible, not to generalize across cases but to generalize within.” (Geertz, 1973, p.24)

# Key sources of sustained differences

- ☞ Religion (on the rise, but for how long?)
- ☞ Moral imagination (*guanxi* versus *networking*)
- ☞ Language and associated mindset and worldviews
- ☞ Local knowledge in the sense of Clifford Geertz
- ☞ A search for (lost?) identity in a world that is increasingly utility-driven (*Brexit? Scotland?*)
- ☞ **However**, the search for utility remains a strong driver of business, management, and consumption motives



# Similarities often are self-fulfilling prophecies

- From a pragmatic business and management perspective, the issue is whether overlooked differences will result or not in failures of locally implemented policies
- Quite often, however, the global solution is imposed on the local context without too much problems
- Therefore, the similarity view often is a self-fulfilling prophecy

# Can it be similar and different at the same time?

- ✔ What looks similar in the eyes of marketers (researchers) may be actually perceived as different by consumers (respondents)
- ✔ This often results in blunders, generally treated as mere anecdotes that cannot be generalized
- ✔ Lexical equivalence typically hides meaning differences (it is particularly true for replications of psychometric scales performed with ‘blind’ back-translation)
- ✔ However, overlap of semantic fields implies that concepts may be partly similar and partly different between different linguistic / cultural contexts (e.g. trust)



**2**

**Comparative thick description:  
Articulating similarities  
and differences in local  
consumer experience**



## 2 – Articulating Similarities and Differences

- ☞ Not simple but Comparative Thick Description
- ☞ In-depth interviews  $\Rightarrow$  cognitive maps
- ☞ Local words, used as *emic* signals, are combined into full profiles of local experiences as narratives linking people to products and consumption
- ☞ Local profiles can then be merged to derive differences dealing with creolization patterns, local consumption experience, and
- ☞ Differences as well as commonalities emerge *from within* and *across* the contexts studied.

# Refining local marketing decisions



- Local marketing decisions are too often made on a dichotomous basis, either standardize or fully adapt. However, similarities are too substantial and differences go too deep to be ignored.
- This research tries to articulate similarities and differences in local consumer experience across multiple contexts. *It shows how language can be used as a discovery tool, along with depth interviews and checks of researchers interpretations by informants, to generate cognitive maps of consumption experiences.*

## An example of how to use Back translation as a research tool, rather than a technical band-aid IMR, 2013)

- Language, being used daily in local contexts, reflects *local knowledge* (Geertz, 1983). This paper shows how translation/back-translation can be used as a joint discovery tool, along with depth interviews and checking of researchers interpretations by informants, to generate cognitive mapping of consumption and taste experiences.
- Local words, used as *Emic signals*, are combined into full portraits of the local experiences as narratives linking people to products and taste. Local portraits can then be merged to derive commonalities emergent *from within* the contexts studied.
- The comparative thick description framework was applied to the bitterness and crunchiness taste experiences in 9 countries (China, France, Germany, Japan, Thailand, Tunisia, Turkey, El Salvador, Mexico) and 8 languages.

# For deriving cognitive maps of local taste experiences (bitterness and crunchiness), the methodology comprises six steps

- ☞ (1) T-BT process based on the central taste concept (i.e. bitter and crunchy) and synonyms to identify lexically equivalent terms;
  - ☞ (2) evaluation of semantic distances by the researchers (on a scale of 0-3);
  - ☞ (3) assessing relevant dimensions of the taste experiences and starting to design partial cognitive maps;
  - ☞ (4) based on the T-BT process, and preliminary insights derived from the three first steps, discussion with informants/native speakers on proper and figurative meanings as well as insights on emic meanings;
  - ☞ (5) finalizing the general cognitive map between the researchers (several sub-steps, including partial cognitive maps); and
  - ☞ (6) checking individual insights (per country/language) with informants based on a feedback on text and cognitive maps with instructions to refer only to their own national/linguistic context.
- ☞ This process leads to the cross-cultural cognitive mapping of local taste experiences in relation to the senses, associations, local cues and stories as well as value judgments drawn from figurative meanings associated with taste.

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- ☛ **Differences and similarities of local beer universes across ten countries:** China, Croatia, El Salvador, France, Germany, Japan, Mexico, Thailand, Tunisia, and Turkey (*Adv. In Global Marketing*, 2018).
  - ☛ Countries chosen because they represent different continents, religions (i.e. five predominantly Christian countries, three Buddhist countries (two countries with a minority Muslim population: China and Thailand), and two Muslim countries).
  - ☛ and 9 world languages with three countries using writing systems not based on the Roman alphabet.
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# Steps leading to cognitive maps in the beer universe (*Advances in Global Marketing*, 2018)



1. Generate categories that are significant for the beer experience: product, places, times, taboos, product attributes, product functions for the individual (e.g. age, gender, and social (socialization, religious prohibition, etc.));
2. Secondary research on beer consumption before interviews to generate a list of themes for the in-depth interviews;
3. Investigate local *emic* terms (labels) that are reflective of local consumption in some of the target countries to generate local cognitive maps in the beer universe;
4. In-depth, non directive discussion with informants on the beer consumption experience in their native country to derive first insights on *etic* and *emic* aspects of the beer consumption experience;

5. Discuss the cognitive map between the researchers and prepare a first version (several sub-steps, including successive drafts of cognitive maps);
6. Check the individual insights (per country) with informants based on feedback on text and cognitive maps with instructions to deal with their own national/linguistic context.
7. Finalize the general cognitive map of the beer universe and the accompanying text.

End-result : cognitive maps per country => *A General Cognitive Map of Beer Universes*

(Legend: CH = China; CR= Croatia; FR = France; GE = Germany; JP = Japan; ME = Mexico; SA = Salvador; TH = Thailand; TK= Turkey; TN = Tunisia)

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- Informants were not required to be experts in beer and beer consumption. Rather, they were told that they did not need to be regular beer drinkers themselves and that they were supposed to have insider rather than expert knowledge about local beer consumption.
  - Although instructed and encouraged not to answer whenever they thought they did not have enough information, they always proved knowledgeable.
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- Out of 20 informants (2 per country/language), 10 were male and 10 female.
  - Some female informants (China, Thailand, and Tunisia) were at first a bit reluctant to participate, their view being that beer was typically a male beverage.
  - They considered themselves, as women, to be somewhat less knowledgeable on the local beer universe.
  - However, it was later clear that they were perfectly familiar with the beer consumption experience in their country.
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# Key findings (1)

- ✔ Beer histories
- ✔ Religion and Foreignness in Muslim Contexts
- ✔ Differences within Differences: Age, Gender, Religion, and Diaspora. Tunisia versus Turkey
- ✔ Product Ethnicity, Creolization, and Beer Business Models
- ✔ Cross-cultural Functional Equivalence: socialization, beverage with meal, refresher, and inebriation

## Key findings (2)

- ☛ Beer as a Social Drink: Age, Gender, and Social Class as Local Determinants of Beer Consumption
- ☛ The Beer Consumption Experience: Places, Times, and *Mélanges*
- ☛ Beer Attributes, Beer Denominations, and Brands, Local and Global
- ☛ Packaging and Serving Sizes

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- ✔ The Findings show that local experiences in several different languages and countries in different areas of the world can be compared.
  - ✔ Cognitive maps highlight commonalities and differences between contexts. They can be extended to other countries/cultures and languages
  - ✔ In essence, differences are qualitative, dealing with creolization patterns, local consumption experience, local preferences, perceptions, and associations.
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- ✔ This approach can be considered as exploratory and interpretive
  - ✔ Although driven by a systematic approach, depends on the researchers and informants' expertise and rigor.
  - ✔ Cognitive maps help evaluate cross-national differences and similarities in local markets.
  - ✔ The emergent similarities and differences are highly meaningful for glocalizing marketing strategies, in terms of advertising, branding, or packaging.
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**3**

**Cross-Cultural  
and InterCultural  
Research design decisions**



# CC-IC Research design decisions

- ☛ Cross-cultural, Intercultural, Intracultural or both?
- ☛ Which background theories (where do they come from?)
- ☛ Which hypotheses: differences, similarities, a mix with adaptation/creolization?
- ☛ Interaction effects of situational and dispositional variables with culture/nation?

# CC-IC Research design decisions

- Which countries/cultures to compare? (NEGO, JBC-IJEC): stimulus, survey, sampling unit, baseline country, within country differences
- Instruments and Data collection (lang-trust,)
- Checking for cross-cultural invariance of instruments and data collection (*ex-ante*, *ex-post*)
- Interpretation
- Submitting and answering to anonymous reviewers
- Publishing (JRP, 2007): reviewers vs. readers

# Conceptual equivalence

- ✔ Definition
- ✔ Conceptual equivalence and cross-cultural invariance (JWB, 2011)
- ✔ Pure Emic concepts (*Wu Xing*, Chinese stratagems (ICBN, 2019))
- ✔ Rather Emic concepts (role ambiguity, role conflict, *Kompetenz*, *Cadres*, Trust, Face, ...)
- ✔ Rather etic concepts (HR, marketing, ...)
- ✔ Strongly etic concepts (Profit, loss, bankruptcy, start-up, company, corporation, ...)

## Chinese Stratagems: *Emic* meaning

☛ “*Time is money*” (English proverb)

☛ “*Let the plum tree wither in place of the peach tree*” (Chinese Stratagem 11, meaning “sacrifice short-term objectives to the long-term goal”)

☛ “*Steal the beams and change the pillars*”

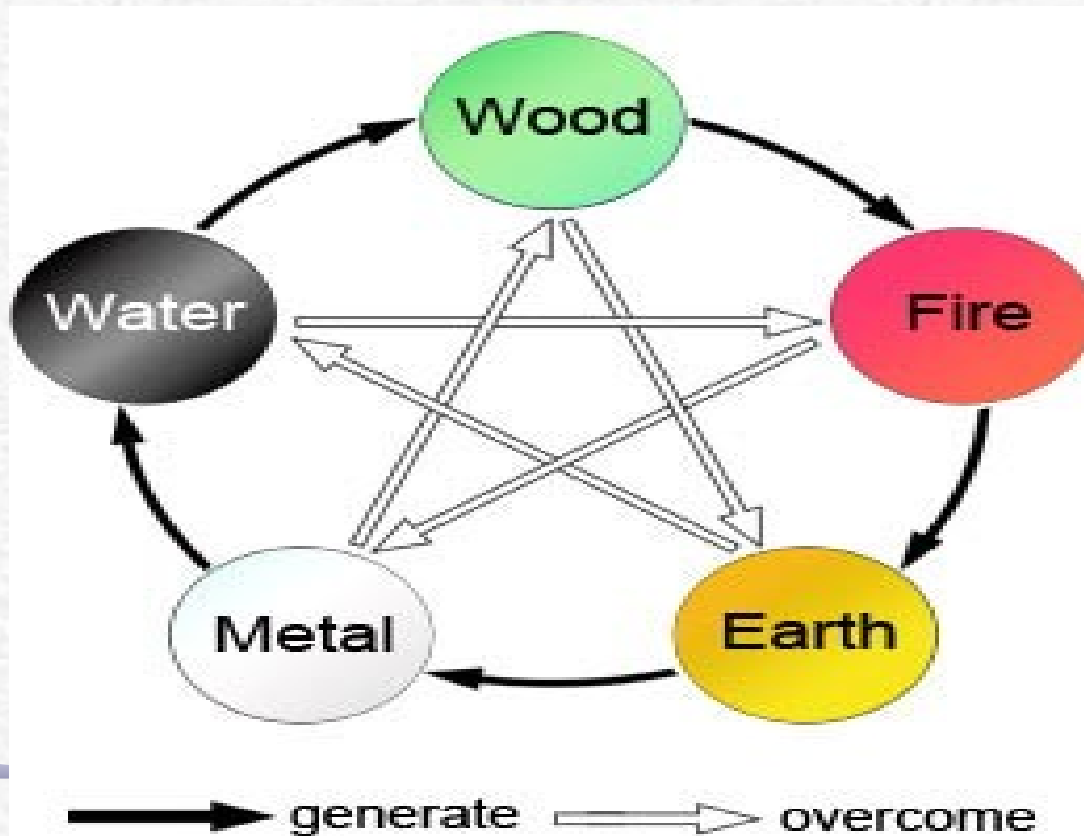
☛ (Chinese Stratagem 25, i.e., change the rules which they are used to follow.)

☛ “*Kill with a borrowed knife*” (Chinese Stratagem 3, Play the competitors against each other)

☛ “*Hide a knife in a smile*”

☛ (Chinese Stratagem 10, Manipulate friendship and hospitality)

Known as the Five Elements, *Wu Xing* (also named Five Movements, Five Phrases or Five Steps). The five elements are jin (metal), mu (wood), shui (water), huo (fire), tu (earth). The five elements in daily life were regarded as the foundation of everything in the universe and natural phenomena. They can generate or destroy one another



*The five Chinese elements and negotiation behavior  
(Remember the West has 4 elements (Air, Fire, Water, Earth))*

<b>Element 1 generates...</b>	<b>. Element 2, which is.....</b>	<b>moderated by Element 3.</b>
<b>Water (imagination and creativity)</b>	Wood (brilliant, blooming ideas)	Metal (practical decision-making)
<b>Wood (brilliant, blooming ideas)</b>	Fire (Commitment, propriety, power)	Water (imagination and creativity)
<b>Fire (commitment, propriety, power)</b>	Earth (material life, deal fidelity)	Wood (brilliant, blooming ideas)
<b>Earth (material life, deal-fidelity)</b>	Metal (practical decision-making)	Fire (Commitment, propriety, power)
<b>Metal (practical decision-making)</b>	Water (imagination and creativity)	Earth (material life, deal fidelity)

# Language and Conceptual equivalence

- ☞ Meaning of **supposedly** similar words => semantic facets and overlap of semantic fields
- ☞ (*ICCBR*, 2017)
- ☞ «Oral Pleasure and expatriate satisfaction” (*IBR*, 1998)
- ☞ Translation for time studies (*MIR*, 1991; *Time and Society*, 1994; *Time and Society*, 2007)
- ☞ JWB 2011: using T-BT as a discovery tool
- ☞ The same instrument in two different languages generates different outcomes (time, Tunisia)



**Back translation is most often presented as a mechanical task.  
However, it is first and foremost a research instrument.**

‘Following established back-translation processes (Brislin, 1976), the survey instrument was first drafted in English by a bilingual researcher fluent in both English and Chinese, then translated into Chinese by another bilingual researcher fluent in both languages.’

In fact, back translation is the main instrument for investigating cross-cultural equivalence.

Researchers are legitimately obsessed with the need to reach full cross-cultural invariance. However, they should feel more relaxed: discovering non invariant aspects of research instruments across cultures is not **a sin**.

# Research Designs

- ☛ *Emic* versus *Etic*
- ☛ Intra-cultural study (in-/out-sider, mix of both)
- ☛ 2 cultures comparative study
- ☛ Pure cross-cultural design (most frequent)
- ☛ Inter and cross-cultural Design F/D - Time management in France vs. Germany (Davoine)
- ☛ Do negotiators adapt when negotiating with partners from different cultures (Graham and Adler, 1989) – adaptation based on shared personal characteristics

# A design for assessing adaptation in time management in France vs. Germany

<b>Managers culture</b> ⇒ <b>Country</b> ↓	<b>French</b>	<b>German</b>
<b>France</b>	Intracultural 1	Intercultural 2
<b>Germany</b>	Intercultural 2	Intracultural 2

# Interaction effects between Culture and situational and dispositional variables

- ☛ Situational: company size, type of contract (one-shot vs. Long term), cohort(?),
- ☛ Dispositional: gender, age, profession, IQ, personality, cultural/emotional intelligence
- ☛ Examples (JIM, interaction with Gender 56-7)
- ☛ *Intercultural Business Negotiation 2019: Chap. 6*
- ☛ IJEC, JBC 2010, The influence of High- vs. Low-Context Communication Styles on the Design, Content, and Language of B-to-B Web Sites

# The deal and relationship model of Intercultural Business Negotiations

- ✔ Prioritization of Deal over Relationship (and vice-versa) – ICBN 2019
- ✔ IT1 (D=>R) and IT2 (R=>D) ideal-types
- ✔ Practical features (goals, BATNA, communication style, time issues, contract-trust, etc.)
- ✔ Each Negotiation style has *Emic* characteristics
- ✔ Moderators: gender, age, personality, multicultural /multilingual background emotional/cultural intelligence, profession, type of contract, etc.

# Individual differences matter a lot

- Based on a simulated negotiation, it has been shown that individual differences between negotiators (e.g., positive beliefs about negotiation, conflict handling style, intelligence and creativity, personality traits, gender, age, and physical attractiveness) account for almost half of the variation in individual outcomes (46%)
- Elfenbein, Curhan, Eisenkraft, Shirako, and Baccaro (2008)

# Operationalization of Culture

- ☛ Culture = nation versus Culture  $\neq$  nation
- ☛ Nominal approach: countries/cultures are assigned a value as dummy variable
- ☛ Country/culture scores on particular cultural dimensions (Hofstede's 4 or 5 dimensions, Hall's HC-LC, Trompenaars, Schwartz's SVS, ...)
- ☛ How are respondents score treated: as individual data or as mean country-scores

# Most research instruments can be used in CC-IC research

- ☛ Data must always be generated in field research (contrary to finance and accounting)
- ☛ Surveys (most frequent): paper and online
- ☛ Laboratory experiments (Trust, JEP, EL)
- ☛ Simulations (Negotiation)
- ☛ In-depth interviews
- ☛ Content analysis (IJEC-JBC, Negotiation Graham)
- ☛ Participant/observation (covert/overt)

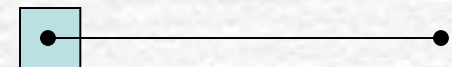
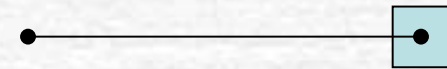
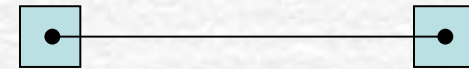


# Cross-cultural data collection challenges

- ☛ Data Collection in Mauritania
- ☛ Data Collection in China => eliminate inconsistent responses
- ☛ Data collection JIM 2007-2017
- ☛ Response biases: social desirability, interview-wer/interviewee biases (gender, ethnic group), non-response, response styles
- ☛ Different techniques for removing (as much as possible) biases from data either at individual respondent or group-level

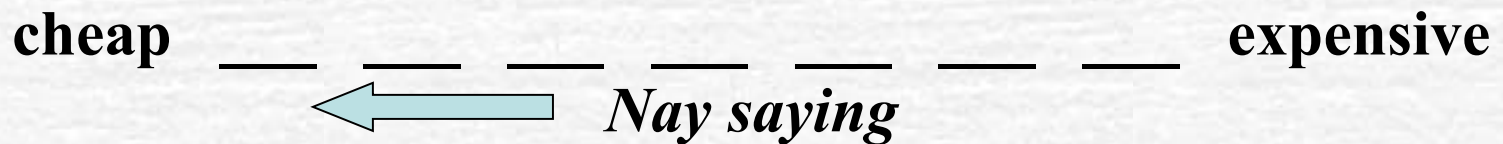
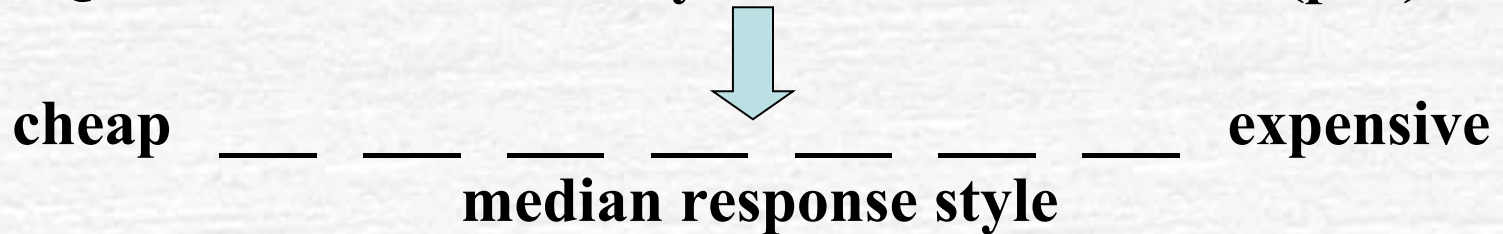
# Response styles

- Mean scores and standard deviations for national groups may be biased
- Median response style : When answering on a scale people tend to give an answer at the mean post of the scale ( variance is artificially reduced).
- Extreme response style : People tend to overstate their responses (variance is inflated)
- *Yea-saying* : People tend to answer on the positive side of the scale (mean score has a positive bias)
- *Nay-saying* : People tend to answer on the negative side of the scale (mean score has a negative bias)



# Response styles : example of a semantic differential scale (Osgood) in an international market research questionnaire

Question : How would you evaluate Brand A (pen)?



# Data Collection Equivalence (*Ex-ante*)

- ✔ Functional Equivalence
- ✔ Translation Equivalence (back-translation)
- ✔ Time lags, meaning of numbers
- ✔ Metric Equivalence
- ✔ Measurement (Categorical/Calibration) Equivalence
- ✔ Sampling Equivalence (also *Ex-post*): Selection of respondents – Internet Samples
- ✔ ***Anticipation is key***: cooperation issues both for local respondents and local researchers

✔ *Ex-post*:

# Data Collection Equivalence (*Ex-post*)

## Measurement Biases

- ☛ Dealing with non-response
- ☛ Assessing and removing Response styles biases
- ☛ Standardization techniques (Ronald Fisher)

## Assessment of measurement invariance

- ☛ Techniques to deal with measurement invariance
- ☛ Examples

Dealing with

## 4 – Conclusive Remarks

- ☛ Dichotomies and (Western) binary thinking
- ☛ *Either/or either/and, ou (or but also and/or)*
- ☛ Links between theories, research designs, data collection, data analysis and expected findings
- ☛ More quantitative, more survey, more psychometrics => more universal, crashes down differences in nature, NOT differences in degree

## Do researchers (unconsciously) favor the search for differences or for similarities?

- Personal interests and beliefs are a source of bias
- ‘Colonial’ designs favor the emergence of similarities
- Common mindset, shared knowledge, recognized scientific approaches, reviewing, academic journals tend to also to favor the similarity view, or at least to favor the discovery of differences in *degree* rather than in *nature*

# Should researchers start with the search for differences or with the search for similarities?

- ☛ Searching first for similarities is likely to crash down differences, most of which will remain unnoticed
- ☛ Searching first for differences is likely to unveil key differences, however with a magnifying effect
- ☛ The next step is to take the true measure of such differences and to progressively discover that much is in fact shared
- ☛ researchers should start with the search for differences if they want to later assess meaningful similarities (e.g. double-entry versus single-entry accounting)



# Conclusive Caveats

- ☛ More qualitative, ethnographic, grounded theory, in-depth interviews,... => tend to possibly exaggerate *differences in nature* and to make it more difficult to assess *differences in degree*
- ☛ Ideally combine both approaches
- ☛ However it is not well accepted by the dominant academic system.

# **Some directions for reasonably combining differences and similarities in our worldviews**

- ☞ More self-questioning about the researcher's own biases and preferences
- ☞ More replications, more diachronic/longitudinal research designs
- ☞ Discovery-oriented use of translation
- ☞ Complementary rather than rival research methods
- ☞ Cross-national/cross-cultural teams working on the basis of 'existential equality' rather than on the basis of a hierarchical/colonial model