

Understanding the Processes of International Trade at the Individual Level: An Alternative Methodology for Conducting Research into Exporters.

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ABSTRACT

The paper describes a useful methodology for researching exporters at the company and individual level. The approach allows for a greater understanding to be reached than is available through the analysis of macroeconomic trade data and will be useful to researchers who are trying to understand exporters and how to stimulate export activity within their own countries.

The methodology was developed during a three-year research study into exporters located in a single region of New Zealand. The methodology involved the combination of a number of distinct stages as follows: (1) initial research that more accurately identified the target population to be studied; (2) a sample set that included exporters within a given region (rather than sampling by industry or sector) thereby allowing for control of location variables (which is not possible when the sample is drawn from an industry across a wider area); (3) use of a postal survey; (4) face-to-face interviews based on the responses to the postal survey and on-site observations; (5) analysis of data using case study methods, and (6) the development of a new theoretical understanding derived from the data.

KEYWORDS: methodology, export, case study, research

INTRODUCTION

The paper describes a useful research design using a combination of quantitative and qualitative data for researching exporters at the company and individual level. Such an approach allows for a greater understanding to be reached than is available through the analysis of macroeconomic trade data alone and will be useful to researchers who are trying to understand and study exporters within their own countries.

The methodology was developed during a three-year research study into exporters located within a single region of New Zealand (Jaeger & Rudzki, 2007). The initial aim of the research was to identify the major obstacles or barriers faced by exporters in order to deepen the understanding of internationalisation, in particular how firms manage their export barriers in order to achieve export performance. The export barriers were categorised into two main groups: (1) industry or product specific barriers, and (2) common or shared barriers independent of industries and products. However, as the research progressed this initial aim was extended to include a broader understanding of the exporter and the development of a new framework of factors – positive, negative and critical - relating to export performance. The study used the cases of successful internationalised firms to analyse common patterns in their practice of export management.

The research methodology grew out of the observable fact that export barriers and obstacles towards internationalisation (Welch & Luostarinen, 1988) have inhibiting effects on export performance, especially for small resource-poor firms. Classical internationalisation theory (Johanson & Vahlne, 1977, 1990, 1992, 1999) suggests that the bigger, the older, and the more resourceful a company is, the better the chances for success of their international or global operations, as commonsense would suggest. In practice, however, many small New Zealand firms have been able to overcome export barriers and achieve successful internationalisation quickly in the complex, turbulent, global environment of today. Existing theory does not fully explain how and why this is possible. This apparent knowledge gap was closed by the research (Jaeger, 2008) with its in-depth investigation into the management of export barriers and related internationalisation practices using an holistic approach based on face-to-face interviews and the development of case studies. Jaeger's (2008) research contributes to knowledge by advancing the understanding of internationalisation behaviour.

Public administrations - at both the national and local level - generally wish to support firms in their internationalisation efforts in order to bring about economic development as an alternative or additional means compared to foreign investment into their economy. However, limited resources force governments of small countries, such as New Zealand, to be selective in the assistance programmes on the basis that not every business can be helped. The focus of the help services tends to be on a small number of promising looking firms capable of rapid growth in foreign markets. As it is common practice for economic development agencies to try to pick export 'winners' the vast majority of export firms miss out on assistance. Furthermore, the selection criteria for support are rather ambiguous and based on estimations and perceptions of growth potential. Thus, the factors that finally determine export success are both ill-defined and controversial, and the relationships between these factors are unclear. Theory and practice do, however, point to export barriers as an impediment to export performance (Katsikeas & Morgan 1994). Companies that have substantial export barriers have difficulties in exporting.

Export barriers, and how they differ between companies (Li & Ogunmokun, 2001) from different industries, form a useful starting point from which to develop insights into the complex situation of factors determining export performance and successful internationalisation. These insights might, in turn, help to solve a problem for New Zealand's and other economies and provide guidance for practitioners, whilst advancing the body of knowledge through new theoretical insights.

The definitions of 'export success' used in the study was based on three measures: (1) *export ratio* (ratio of exports to total production); (2) the *time elapsed* between the formation of the company and its first export consignment; and (3) the company export manager's *subjective assessment* of satisfaction with achieving the firm's objectives given that goals (interpretation) for 'export success' differ between subjects. The study builds on, and integrates, existing theoretical concepts from export performance models e.g. Aaby & Slater (1989), Chetty & Hamilton (1993) and Morgan, Kaleka & Katsikeas (2004).

Studies investigating export barriers have been conducted before, primarily using quantitative survey tools (Shaw & Darroch, 2004). In contrast, the authors' research engaged mainly qualitative (supplemented by some quantitative) research tools within case study analysis. This allowed for a close in-depth comparative investigation of the internationalisation practices of successful and less

successful firms based on actual evidence drawn from the first-hand testimony of the subjects themselves.

However, the strengths of the methodology are in its mix of both quantitative and qualitative approaches, its triangulation of data and its ability to control for location-specific factors through a study that encompassed all sectors, rather than other studies which have focussed on a single industry.

EXPORT BARRIERS

The Aaby & Slater model (1989) is well known and widely accepted in spite of its age and limitations, and offers a set of reference when discussing export barriers. Their framework (1989) locates export barriers in relationship to export performance and this guided the research. The more recent conceptual frameworks of export performance (Chetty & Hamilton, 1993; Leonidou, Katsikeas, & Samiee, 2002; Morgan, Kaleka & Katsikeas, 2004) are also based on Aaby & Slater's original work. According to Aaby & Slater (1989) export barriers have a direct negative relationship on export performance. It is proposed that export barriers and the successful management of these should be the means to investigate the complexities surrounding the achievement of export success. Dean, Menguc, & Myers (2000) followed a similar strategy when they investigated New Zealand small manufacturing firms in 2000. Research into how firms from different industries manage to overcome shared export barriers when using the same infrastructure revealed the rationale behind their internationalisation process.

Aaby & Slater's framework is based on meta analysis of studies that are mostly quantitative. In the field of internationalisation in recent years there has been an over reliance on quantitative research methods, possibly because such studies are overwhelmingly preferred for publication by academic journals. Additionally, the research is varied, fragmented and sometimes contradictory. Various attempts have been made to integrate studies into one overall internationalising framework (Aaby & Slater, 1989; Bilkey, 1978; Chetty & Hamilton, 1993; Coviello & McAuley, 1999; Leonidou & Katsikeas, 1996; Leonidou, Katsikeas, & Samiee, 2002; Morgan, Kaleka & Katsikeas, 2004) and the new methodologies discussed later arose out of a need to investigate the question of how exporters manage their export performance from a holistic rather than any narrow disciplinary approach, using both qualitative and quantitative techniques, including case studies.

The research question for which this methodology was developed was therefore to understand internationalisation through identifying how successful firms manage the export barriers and achieve export performance. Arguably the most successful international firms in respect to internationalisation are what are now known as ‘born global’ companies. These firms are able to operate successfully in international markets immediately from their incorporation in spite of barriers. Conventional firms establish international business more slowly while operating from a supporting domestic base and addressing their barriers and obstacles to export gradually. It is on these conventional firms that earlier internationalisation models have focussed. Yet, successful firms of either category have developed strategies to ensure continued performance in international markets and it was with this in mind that the research question for these new methodologies was clarified as: *“How do successful New Zealand’s exporters manage their export barriers and achieve internationalisation?”*

THE METHODOLOGIES

The majority of research on international trade has been undertaken using macroeconomic quantitative analysis of trade data. While such research has its place, in order to attain some depth of understanding, it is necessary to find new ways of researching individual exporters and the firms in which they are formed.

The methods discussed in this paper are both quantitative and qualitative, and allow for data analysis in terms of the responses provided. They are also interview-based allowing for a greater depth of understanding to be attained than that achieved through desk-based statistical research alone. However, it is important at the outset to realise that the methodologies are time-consuming with the need for face-to-face interviews at the subjects place of work, the travelling time to the interview location, the interview itself (generally about 60 minutes in duration) and in the subsequent transcription and analysis of the data generated.

The benefit of such a data-rich approach is that the research design enabled the identification of a behaviour pattern independent of sectors or industries (Jaeger & Rudzki, 2007) as well as the construction of a new theoretical model with both explanatory (descriptive) and predictive power

(Jaeger, 2008). The findings suggest that within the limited group studied, export barriers drive strategies. In a situation of severe resource constraints, large geographic distance from international markets and a small domestic market, New Zealand's exporters had to anticipate their export barriers in order not to let them impact on export performance. Successful companies reduced the influence of obstacles towards internationalisation by building their strategies creatively around their core competencies in what is described as a 'bricolage' approach (that is, making do with what you have to hand) (Jaeger, 2006a, 2006b, 2008).

The major innovations in the methodology were the integration of a number of distinct stages to structure the research as described below. It should be noted that the use of multiple methods in the study of the same objects is a generally accepted definition for '*mixed methods*' and '*triangulation*' Denzin (1978) and scholars such as Jick (1979) and Marschan-Piekkari & Welch (2004) recommend mixed methods for achieving quality results in international business research. They emphasise that it makes sense to perform multiple investigations of the same research object in order to comprehend the reality better. This type of data collection provided the potential for increased data reliability thus triangulation added rigour to the study (Jick, 1979; Trochim, 2001).

(1) Initial Research

The aim of the initial research was to more accurately identify the target population to be studied. Within New Zealand, the researchers were not able to access Customs data for reasons of privacy. Therefore, online searches were undertaken of existing databases in the public domain, such as the national register held by Companies Office, data held at the local economic development agency (EDA), as well as company web-sites or homepages, local newspaper articles and the '*local knowledge*' of colleagues completed the preparations for the interviews. Although not ideal, this method allowed for the compilation of fairly comprehensive information on the identity of exporters within the region.

(2) Sampling

The 'sample' comprised 180 exporters identified within the Manawatu region of New Zealand (rather than the more common approach of sampling by industry or sector). The great strength of this approach was that it thereby allowed for control of location variables (since 'everybody was in

the same boat') which is not possible when a sample is drawn from an industry or sector across a wider area, and where geographical factors such as proximity to airfreight facilities may be critical to export activity.

The selection criteria for the survey participants were based on two conditions: (1) the companies had to be currently active in exporting and (2) that they had to be based in the Manawatu region. The rationale behind this choice of sample was to find respondents who had both an interest and experience in exporting. Non-exporters and pre-exporters such as firms which intend to export in future were not included in this study. The reason for their exclusion was that the study was not just to find out about potential export barriers but to go one step further and investigate how these barriers were managed. Active exporters were therefore in the best position to supply this information based on their own experience. Neither firm size nor industry were used as factors for selection of the cases.

Firms were included in the study regardless of their international engagement level and age. There were no limitations on company size, no limitation concerning industry sector and product, no limitation regarding management or organisational structure, and no limitation in regard to turnover. However, the participating companies did all belong to one geographic location which means that they shared a common infrastructure and the same regional business environment.

(3) Postal survey

The use of a postal survey allowed for a response rate of 30% (n=54) to be achieved. In hindsight, it would have been better to contact all the exporters personally given the total number and relative lack of response from the majority.

The survey data obtained was subjected to a quantitative analysis and provided an overview of the range and volume of exporting businesses in the region and additional business background information. The question "*How do you identify your potential markets?*" was answered by one exporter with the words "*By eye sight!*" prompting the progression to the qualitative investigation to explore the meaning of such ambiguous and intriguing responses from the survey (Jaeger & Rudzki, 2005). A follow-up of the same survey population also presented an opportunity to triangulate the

results and improved the significance, reliability and overall quality of the study as recommended by Jick (1979) and Marchan-Piekkari & Welch (2004).

(4) Face-to-face interviews and on-site observation

An interview schedule was designed and structured around questions that had prepared in advance and that integrated the replies from the survey. The schedule focused on ambiguous statements and questions which did not provide explicit answers. The person targeted for the interview was the person who had filled out the questionnaire and who was in charge of exporting. This was in most cases the owner-manager who was also in charge of the internationalisation process.

The average duration of the semi-structured interviews which were conducted face-to-face and on company premises was about 60 minutes. Easily established rapport facilitated the flow of communication, particularly as the interviewer was able to make reference to the earlier postal survey responses. On-site observation of the exporter's business also helped the interviewer to understand the nature of the business operations being undertaken.

The practice of making the original response to the postal survey available during the appointment, provided opportunity for the participants to once again read their responses and comments before being interviewed. On seeing their own hand-writing and the original document, they knew that their responses had not disappeared into the 'great black hole' of research inputs, and that the time and effort spent in filling out the questionnaires was greatly appreciated by the researchers. This presentation of the postal survey also helped to build credibility and trust.

Together with the interviews, on-site visits provided an effective qualitative data collection method, providing additional contextual insights into the general circumstances of participant companies. These insights included such aspects as the state of the firm, size, condition, staff, tidiness, organisation issues, other problems, assets, artefacts, and the 'feel' about the place (whether it was busy, whether it was forward thinking in its outlook etc.).

(5) Data analysis and case study construction

The analysis of data was conducted using a modified Grounded Theory approach (Glaser & Strauss, 1967; Glaser, 1978). Preconceptions about the nature of the hypothesis to be tested were removed as there was no use of a hypothesis, this being replaced by a 'trawling for information' as befitted investigation in a new area, with the information collected being subsequently compiled into a case study for each exporter. Each case was then analysed for factors that were common and those that were not.

In terms of the analysis of the case studies, the approach of key authors (Eisenhardt 1989, 1991; Yin, 1981) was followed. The triangulated data for each company was assembled into case studies. In order to facilitate cross-case comparison, it was expedient to organise the collected material around the specific themes that were common to the cases. For analysing the data of the in-case studies we drew on the work of Miles & Huberman and Glaser & Strauss (Glaser & Strauss, 1967; Miles & Huberman, 1984). The inside case analysis provided the basis for selecting the exemplary case studies that showed high export performance. For the last step exemplary cases were to be selected from the group of fifty case studies and further analysed, leading to theory building. These selected cases provided the best opportunity to identify patterns and commonalities across the industries and regardless of the export products (Glaser, 1978; Glaser & Strauss, 1967). Cross-case comparison strengthened the ability to draw conclusions of common patterns which formed the basis of construct and theory development (Eisenhardt, 1989).

Various methodological approaches to achieve the aim of exploring and explaining practices and perceived barriers to exporting are possible (Easterby-Smith, Thorpe, & Lowe, 1999; Kvale, 1996; Van Maanen, 1988), however, to use data collected from people whose experience and knowledge about exporting is the basis of their livelihoods is clearly the most straightforward and reliable method and therefore this approach was chosen. The assumption underlying this was that every single practitioner is most likely to have gathered a wealth of experiences and developed a position on the issue of export and export barriers. Export practitioners as a resource, are to be preferred to secondary sources especially national or regional government policy documents that are not evidence-based, but rather based on a political ideology irrespective of its source.

Eisenhardt (1989) selects useful exemplary cases from a large pool of possible cases based on theoretical sampling. In the present study exporting companies in the Manawatu region represented

the large pool of possible cases (180 in total). Fifty firms took part in the interviews and were the pool of cases from which a selection of exemplary cases was drawn. The final theoretical sampling of exemplary cases was based on the firm's export performance. For theory building, cases are selected for theoretical and not statistical reasons. Thus, random selection of the cases is neither necessary nor preferable (Glaser & Strauss, 1967). During the analysis of the data it is recommended that a detailed description of each case is provided. Even if this is a pure description it is necessary in order to generate insights (Gersick, 1988). The reason for writing up the individual cases is to get intimately familiar with each case as a distinct individual unit of analysis with unique attributes, which is a necessary stage in identifying later both common patterns across cases and features that are particular to an individual case.

(6) Theory construction

Eisenhardt (1989) suggests as the next step that cross-case comparison of the selected cases is undertaken in order to identify cross-case patterns. The cross-case comparisons in this study are based on the selected cases from high performing exporters. At this stage, according to Eisenhardt (1989) and Yin (1981), constructs can be developed and tested intermittently. If relationships and constructs are supported by mainly qualitative data then a good understanding of the causal relationships is possible which is necessary for the establishment of internal validity.

The final stage of theory development through case study research implies the comparison of the emergent concepts and theory with the literature. In short, Eisenhardt's comparative case study approach enables the researcher to most effectively tackle the research question and to develop theoretical results. The success of the approach is evident in recent New Zealand research investigating a similar research problem, that of the internationalisation practice of born globals (Chetty & Campbell-Hunt, 2004; Jaeger, 2007).

LIMITATIONS OF THE METHODOLOGY

The limitations of the methodology are readily apparent. Firstly, the research is subject to similar constraints that impact on most qualitative studies such as the amount of time and other resources available.

Secondly, the results through the participant selection are confined to one particular New Zealand region which may or may not be representative of other regions or countries. Only 50 companies from the Manawatu region were involved in the interviews (out of 180) and the outcome might also be different for the two major New Zealand economic centres in Auckland and Wellington. Further larger-scale studies targeting urban-based exporters would provide valuable insights. Thus the findings are New Zealand specific, and, arguably, exporters in New Zealand operate under different circumstances than exporters elsewhere. Thus there may be limits to the generalisability of the research.

However, similar criticisms can be levelled at other studies that focus on just one country such as the seminal and extensively quoted and accepted Scandinavian studies (Johanson & Vahlne, 1977; Johanson & Wiedersheim-Paul, 1975). What the sample limitations of the present study lack in international breadth, is compensated for in the richness of its nature as an in-depth, qualitative study, a notion which is supported by Chetty (1993). Indeed, from a New Zealand perspective, this specific 'location' feature is one of the strengths of the current study.

Although the authors' research (Jaeger & Rudzki, 2007) is based on only fifty case studies, it does not attempt to make any statistical statements. However, fifty in-depth cases is a large sample for such a methodological approach, and can be put into perspective by examining the sample sizes of some prestigious international studies that have used similar methodologies. For example, Johanson & Vahlne (1977) as well as Johanson & Wiedersheim-Paul (1975) investigated the export activities of four companies from Sweden; Crick & Spence (2005) used twelve in-depth interviews of UK high-tech small and medium sized enterprises; Chetty & Campbell Hunt (2004) based their study on sixteen in-depth case histories of New Zealand companies and Baker & Nelson's (2005) large study was conducted on a sample of twenty nine companies in the United States of America. Within such a context, the present study is the largest of them all with fifty cases.

CONCLUSION

The methodology used for this research has been found to be robust and although time-consuming, it generates rich-data which can be used for evidence-based policy making at the company, regional, national and international level.

The findings also help to understand the reality of exporters and international trade at the microeconomic level by identifying both common and unique features.

Both the methodology and the findings are also capable of being tested in other countries and can lead to breakthroughs in understanding about the nature of the export phenomenon in question and how international trade can be stimulated down to the individual company and export staff level.

NOTE TO RESEARCHERS

The authors would welcome contact with other staff or student researchers working in the area of exporting. We are happy to provide the template survey questionnaires and other research tools that may be of use to others and which would help in reducing the time designing new methodologies.

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