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BEGINNINGS OF A FULFILLING CAREER

Gregory E. Osland

MSU ROOTS

In 1989 I decided to join the doctoral program in Marketing at Michigan State University (MSU). Although I had been accepted into the doctoral programs at several universities, including UCLA and the University of Washington, I chose MSU because of its strong reputation in International Marketing, and its emphasis on managerial applications. Tamer Cavusgil had recently joined the MSU faculty and had just initiated the Center for International Business Education and Research. I wanted to learn from him as my mentor and dissertation chair, and was encouraged by the potential resources available through the CIBER to do international research. This decision to come to MSU and to be a student of Tamer Cavusgil is a decision I have never regretted, and that has enabled me to become a successful, full professor, engaged in a career in International Marketing.

As a doctoral student of Dr. Cavusgil in Marketing and International Business from 1989 to 1993, I learned many concepts and skills in international marketing and international research. Even more importantly, I began to develop a philosophy of research, teaching, and service that has motivated and guided my career in academia. I deepened in my love for learning, as well as for helping others to learn. I gained a greater passion for international research and for helping to globalize business education.

Looking back nearly two decades ago, a few people and situations appear now to have been most memorable in my development as a professor and researcher. I would like to share a few impressions, not necessarily in order of significance.

My first Marketing course at MSU was a class in the History of Marketing, taught by Stanley Hollander. Dr. Hollander made a lasting impression on me as a gentleman and scholar who was committed to a lifetime of learning. I recall seeing him sitting in his office reading books and student papers with a magnifying glass, due to his failing eyesight. I wrote my first paper that was accepted into a conference during that semester (Osland, 1991). Dr. Hollander encouraged me in my detailed investigation of primary sources and affirmed my findings and writing. Seeing his example as a person who loved to learn as long as he could breathe has helped motivate me to be a life-long learner. His stories of what he and his wife had learned on trips to elder hostel seminars also helped me to appreciate having an eagerness to learn from many disciplines and many people and situations. I began to reject the notion of becoming an extreme specialist in academia who was only focused on one narrow topic or issue for a lifetime. Dr. Hollander seemed like a model "renaissance man" to me, who appreciated many domains of culture, history, economics, physical science, and so on.

This belief in the value of learning from many disciplines was deepened when writing papers for Glenn Omura's seminar. Although I do not even remember the name of the course, I do recall my delight in gaining insights into marketing from such diverse fields as behavioral ecology and anthropology. My current research stream in ecotourism draws on an array of disciplines. As an internationalist and broadly trained scientist, the interdisciplinary aspects of business are clear. Thus, my research draws on the literature from marketing, strategy, organizational behavior, and economics. The behavioral sciences of sociology, psychology, cultural anthropology, political science, and the physical science of conservation biology have also provided theoretical direction and insights to my streams of research. The strategy-structure-performance framework, transaction cost analysis (TCA) theory, and bargaining power (BP) theory are three of the most frequently used paradigms in my research.

Dr. Cavusgil helped me craft my first paper for publication in an academic journal as a first year doctoral student (Osland, 1990). I learned the importance of developing or applying a communicable theoretical framework. He also helped me to learn how to market my papers. This skill in determining the targeted journal and in developing the "product" to satisfy the needs of this market has served me well in getting my manuscripts

published, over the last two decades. Dr. Cavusgil's example as a hard-working scholar who devoted regular time to writing has motivated me to maintain a disciplined, consistent work ethic throughout the years.

Overall, I learned from Dr. Cavusgil, Dr. Hollander, Dr. Nason, Dr. Calantone, and many others in the Marketing department that knowledge creation is an important and motivating responsibility of an MSU doctoral program alumnus. I believe that MSU's heritage as a land-grant institution and overall organizational culture have helped inculcate graduates with a sense of duty to others and a commitment to develop applied research. As I help to expand the frontiers of knowledge in international business, I hope that practitioners, students, and academics from around the world can share in the results. I have become committed to developing basic research that can be applied in business and communicated in the classroom. Serving as an example to me, much of Dr. Cavusgil's research has been highly relevant to practitioners. I still use several of his articles on country selection and on pricing in my MBA International Marketing classes.

To create new, significant, and applicable knowledge requires the use of sound research methods. Especially while doing my dissertation research, I learned and refined a number of research skills under the instruction and oversight of Dr. Cavusgil and Dr. Calantone. I learned and have incorporated many qualitative and quantitative methods of research throughout my career. Dr. Cavusgil and my committee encouraged and affirmed the use of interviewing managers in the field. I have continued to sharpen my interview skills and qualitative research methods in at least six research projects since my dissertation. They also taught me the importance of networking, which has motivated me to often work with outstanding colleagues to make sure that the methods and results can be the best possible.

My involvement in lifetime learning effectively models an ideal of learning that I seek to pass on to my students. Moreover, active, continuous research equips me to be more effective in teaching as I enthusiastically help students to learn the latest developments in international marketing and management. I also seek to involve students in the design and implementation of my research. My strong commitment to research and my understanding of research methods and several subject areas strengthens my ability to motivate and help undergraduate honors' students, and students in all of my classes, to develop sound research projects. Research for Dr. Cavusgil and others at MSU is not an isolated endeavor for personal glory. They have

Dr. Cavusgil has supported and affirmed my building of an academic career that balances teaching and research.

ACCOMPLISHMENTS IN RESEARCH

As a life-long learner I have continuously conducted research and published articles since earning my Ph.D. in 1993, and intend to keep learning and doing excellent research for the rest of my life. From 1989 to 2001, the focus of my scholarly activity was on international modes of entry, primarily set in the context of East Asia. Since 2001, I have focused my research on ecotourism, primarily in Latin America. Output from my research has appeared in an array of marketing, management, and tourism journals and outlets around the world. I will highlight two of my streams of research, four of my research projects, and eight journal articles that emerged from these studies.

International Modes of Entry Research

The Performance of U.S.–China Equity Joint Ventures (Dissertation: Data Collected in 1992–1993)

This study had two major objectives: (1) to identify, describe, and compare performance criteria and outcomes of U.S.–China international joint ventures (IJVs) from the perspectives of both Chinese and American managers; and (2) to develop a framework that provides explanatory constructs and hypotheses concerning performance of U.S.–China joint ventures. In-depth case studies of operating joint ventures and their respective parent companies were utilized in this exploratory study.

I was lead author of the article, “Performance Issues in U.S.–China Joint Ventures,” which appeared in *California Management Review* in 1996, with Dr. Cavusgil as the second author (Osland & Cavusgil, 1996). This article develops an integrative model of performance of U.S.–China joint ventures showing linkages between the primary elements (government, organizational structure, operating strategy, industrial structure, and performance). For example, government was found to have both a constraining and enabling effect on IJV structure, strategy, and performance. As exploratory, interpretivist research, the findings are stated in the form of eight hypotheses. Hypothesis one states that the more important the industry to the central government leaders, the more that the central government determines the structure of the IJVs in the industry. This study formed the

basis for my 1996 research project on multinational corporation (MNC)-host government interaction. Each of the six linkages can be studied in more depth, and other researchers have done so, such as Bjorkman, who investigated the linkage between organizational structure and performance. This *CMR* paper is cited in most studies on modes of entry in China and has been cited in several textbooks on international marketing.

A sole-authored article, "Successful Operating Strategies in the Performance of U.S.-China Joint Ventures," was runner-up of the "Hans Thorelli Best Paper Award for 1994" for *The Journal of International Marketing* (Osland, 1994). This was one of the first studies on joint ventures to acquire primary data from Chinese managers and government officials. New to the literature was the finding that the performance criteria used by each group of critical stakeholders in these IJVs appeared to be converging, with profitability emerging as the dominant element. Previous work assumed that Chinese were most concerned with economic development criteria. Four important strategic factors in the performance of large, U.S.-China IJVs were also uncovered. Analysis of a large sample of IJV and parent company managers is needed to test the findings with statistics. Extending the research to other populations of IJVs, such as U.S.-Taiwan and Japan-China, may also reveal cultural contingencies, or help establish the generalizability of the observations.

U.S. and Japanese MNCs Modal Choices (Data Collected in 1995)

The major purpose of this large research project was to explain and predict international entry mode choices for multinational companies from the United States and Japan, utilizing TCA theory, BP theory, and Hofstede's framework of cultural variables. A second goal was to develop an export performance measure that is cross-culturally consistent. Third, we linked entry mode choices and strategies to the performance of foreign entrants. A group of three former MSU Marketing students designed and conducted this research project - Shaoming Zou, Ray Taylor, and me. Each of us served as the lead author of at least one of the four or five papers that emerged from this project.

"The EXPERF Scale: A Cross-National Generalized Export Performance Measure" (Zou, Taylor, & Osland, 1998), Journal of International Marketing. Much controversy exists regarding the key determinants of export performance and their relative importance. A major reason for the lack of consensus is the absence of a unified measure for capturing export performance. In this study we attempted to develop an export performance

measure that is cross-culturally consistent. Results from our survey of United States and Japanese exporters suggest that a three-dimensional export performance measure containing a financial dimension, a strategic dimension, and a perceptual dimension can be consistently used. If future studies adopt the three-dimensional scheme for measuring export performance, it can be expected that research findings will be more readily comparable, even across countries. More importantly, our understanding of the determinants of export performance should advance significantly. One important future research direction is to validate the three-dimensional scheme in other countries to increase our confidence in the cross-cultural consistency of the scheme. Another research direction is to investigate whether the measurement scheme we developed can be generalized to cases in which firms engage in joint venture operations. This article was honored as the "Hans Thorelli Best Paper of the Year" for the *Journal of International Marketing* for 1998.

"Selecting International Modes of Entry and Expansion" (Osland, Taylor, & Zou, 2001), Marketing Intelligence & Planning. This article helps provide guidance to international marketing managers as they evaluate which of four modes of entry to use in entering and/or expanding operations in other nations. It is one of the first papers in this stream of research that makes the theories and results accessible to practitioners and to MBA students. Qualitative data from my interviews with managers in the United States and Asia were integrated with quantitative data from our large-scale survey of United States and Japanese managers. Modes are shown to vary in terms of the level of control, the quantity of required resources, and the amount of technology risk. We were the first researchers to provide results that suggest that target market factors are more important to Japanese than to Americans; whereas American managers show more concern for internal, company considerations, when making mode of entry decisions. One important implication is that in high-risk situations, Americans may face less competition from Japanese firms in setting up investment modes, such as joint ventures and wholly owned subsidiaries. Further studies could investigate and compare the factors that European managers use in making modal decisions.

MNC-Host Government Interaction in China (Data Collected in 1996)

This exploratory research aims to describe and analyze the role of the host government(s) on the entry mode choices of MNCs in China. One goal of the study is to describe and analyze central government desires and pressures

regarding MNCs in China. A second objective is to classify and describe MNCs responses to government pressures. This study is one of the first to investigate empirically a range of MNC responses to host government pressures. This is one of the only studies on MNC-government interactions that has collected primary data from MNCs and governments from multiple nations (United States, Sweden, Finland, Hong Kong, China).

I conceived the project and recruited a colleague and well-regarded researcher from Finland, Ingmar Bjorkman, to help design and carry out this research. We both acquired funding for the project and contributed equally to the research. One article has my name first and one article has Bjorkman's name first.

"MNC-Host Government Interaction: Government Pressures on MNCs in China" (Osland & Bjorkman, 1998), European Management Journal. This study analyzed central government pressures regarding MNCs in China in the 1990s, particularly the pressures concerning operational modes utilized by foreign companies investing in China. The results indicate that China ratcheted up the pressure on MNCs to produce and source locally. Moreover, U.S. MNCs were facing intense pressure to lobby their own governments on behalf of China. The previously intense pressure on MNCs to export large portions of their output has been lessened. Useful insights into government workings and into how to deal with the government are provided. Future research should seek to uncover the kinds of pressure placed on MNCs in other developing nations. A comparative study of how different types of governments put pressure on MNCs would be an interesting and significant follow-up research project.

"Multinational Corporations in China: Responding to Host Government Pressures" (Bjorkman & Osland, 1998), Long Range Planning. This study analyzed the responses of Western MNCs to host government pressures in China. This was one of the first articles to provide managers with a clear and fairly complete set of ways in which they can respond to government pressures. Based on a series of in-depth interviews, ten response strategies were found and described, ranging from "agree" to "challenge." Although compromise is a common response, MNCs are beginning to learn the effectiveness of influence and co-opt strategies. A set of managerial recommendations should help Western MNCs to become more effective in dealing with central and provincial Chinese governments. Future research could test the usage of these newly uncovered responses on a large sample to increase understanding of the frequency and effectiveness of the responses.

Ecotourism

My research stream on ecotourism integrates a lifetime of training, experience, and interest in conservation biology, economic development, international marketing, cultural anthropology, sociology, and foreign languages. I enjoy serving as an inspiration to students and faculty to learn new languages and to do jobs and projects that they love. This research stream began in 1999 with an extensive literature review on ecotourism and sustainable development. The empirical, exploratory research on the performance of ecolodges began in 2001. Bob Mackoy, another former MSU Marketing student, and I, selected three representative, developing nations in Meso-America and South America that have biologically diverse, but threatened natural areas, and different levels of ecotourism development. In 2001 and 2002, I conducted an on-site analysis of 21 ecolodges and their guests in Mexico and Costa Rica, using case study, personal in-depth interviews, and participant observer techniques. In 2003, I used similar methods to analyze ten ecolodges in Ecuador, one of the world's most diverse national biological hotspots.

This is one of the first empirical analyses of the relatively new, but fast-growing ecolodge industry. The model that we have developed will serve as a testable foundation and point of comparison for future research in other parts of the world. The results should help ecolodge owners improve their understanding of how to manage ecolodges and enhance the potential for success in its various dimensions. This knowledge and application can also help governments and non-government organizations design policies that will further efforts to conserve and sustainably develop natural areas that are under stress.

"Ecolodge Performance Goals and Evaluations" (Osland & Mackoy, 2004), *Journal of Ecotourism*. This seminal study classifies ecolodges and uncovers the criteria that owners/managers use to assess the performance of their lodges. It is probably the first study of ecolodges that goes beyond the individual case study method to collect empirical data from interviews with dozens of managers in multiple nations. We found that ecolodge owners/managers, unlike owners of typical hotels who rely on enterprise output performance goals, also utilize goals that we classified as sustainable economic development (including environmental and community goals), internal process, and adaptive open systems types. About two-thirds of the lodges in our sample were evaluated as successful when using multiple measures of performance, of which financial measures were most important.

Further studies can test differences in performance goals and evaluations between casual, dedicated, scientific, and agri-ecotourism lodges.

"Lodge Selection and Satisfaction: Attributes Valued by Ecotourists" (Mackoy & Osland, 2004), *Journal of Tourism Studies*. Although the ecotourism literature is growing rapidly, few researchers have systematically examined how ecotourists select and evaluate lodging alternatives. We designed two studies to identify the range of lodge attributes relevant to ecotourists. Study 1 used e-mail survey responses from dedicated birders, while Study 2 used data from on-site interviews with visitors at ecolodges in Mexico, Costa Rica, and Ecuador. The two most-commonly mentioned attributes in both studies were "proximity to natural areas" and "cost." We found that independent ecotourists utilize a compensatory decision-making model for selecting ecolodges; i.e., they make tradeoffs among attributes. We demonstrate that understanding lodging attributes of importance to ecotourists is the first step in modeling lodge selection and satisfaction processes, and is useful to managers in developing marketing strategies for their lodges. Further research can test the possible differences we found between different types of ecotourists. Managers may then use these results to develop differentiated target marketing strategies.

FUTURE RESEARCH

One principle of research that I recall learning from Dr. Cavusgil is the importance of "grounded theory." He encouraged me to attend an Anthropology class at MSU that highlighted the value of field research in which scientists build their theories on participant observation methods – a type of inductive research. Dr. Cavusgil told me to be cautious of findings and theories built only on survey research of managers. Observing behaviors first hand, and doing interviews with respondents face-to face usually provides much richer, and often more valid results than those from large-scale surveys administered from a distance. He encouraged me to take time and to spend money to go to the factories and offices of the international managers I sought to learn from in China.

Possessing that value and belief about participant observation research, I intend to conduct future research on ecotourism as a tourist-visiting ecolodges. My next project is scheduled to take place during my sabbatical semester, next academic year. During that time I plan to visit a number of nature-based lodges in Ecuador, observing the behaviors of naturalist guides

conducting tours with the visitors. As a participant on the tours, and guest at the lodges, I intend to interview guides, other tourists, and the lodge owners/managers. This is part of a project on the roles of naturalist guides in the performance of ecolodges. Previous research that we have done on factors in the performance of ecolodges have led to the notion that naturalist guides based at the lodges have an important impact on the satisfaction of the guests, and on their knowledge and attitudes toward nature and conservation.

For my overall stream of research in ecotourism, I have developed a number of objectives and critical success factors:

1. To continue to analyze and synthesize the extensive literature on ecotourism, defining ecotourism, identifying what is known, and determining the gaps that exist in the literature. As a multidisciplinary topic, I and my assistants seek to read, review, and keep up to date on the ecotourism literature among more than 30 journals.
2. To become fluent enough in Spanish to conduct ecotourism research in Latin America, and, eventually, to be able to teach ecotourism in Spanish in Latin America. I have been studying Spanish since 2001. To be fluent in Spanish requires immersion in the language and frequent review/study. I intend to take advanced language classes at a Spanish Language Institute in Ecuador, and, possible, to live with a family during that time.
3. To uncover critical success factors in the performance of ecolodges. This is an ongoing goal of my ecotourism research stream as I seek to develop managerially relevant results, valued by the industry. In 2005, Bob Mackoy and I delivered a presentation to the Tourism and Travel Research Association on "Issues in Ecolodge Management in Latin America" that identified and discussed some critical success factors that we had found in our first ecotourism research project.
4. To develop a testable model of critical success factors in the performance of ecolodges. We have developed a draft model that identifies and integrates a large number of external and internal factors (see Appendix).
5. To explore and test specific linkages in the model. The research project discussed above is one application of this goal, as I seek to analyze the effects of naturalist guides on ecotourism performance.

As a full professor in the last decade of my career, I am not just focused on my own research stream. I am also trying to stimulate and assist my younger colleagues. Thus, I have been engaged in several other research projects. One of these has centered on Internet trust, particularly the role of signaling through trustmarks. A number of current and former Butler

University Marketing professors and I are integrating the literatures on signaling theory and trust, and making extensions to the Internet. We are identifying and classifying sets of Internet signals, and highlighting the critical role of trustmarks in a computer-mediated environment. This is one of the few academic explorations of this new form of consumer signal in e-commerce. Each of us has developed a set of hypotheses related to the effectiveness of trustmarks, centering on variables such as the communication source and type of culture. Thus, we developed theory and set the stage for an empirical study of Internet market signaling phenomena that tests several of the hypotheses of this chapter. We are currently writing a series of articles based on the theory presented in this conceptual article, and the data that we have collected from Internet surveys on trust and trustmarks in five nations.

A new junior Marketing faculty member at Butler University, and I, are exploring the role of culture in consumers' retail channel choices. The purpose of this research is to examine whether different cultures prefer to interact with marketing channels in different ways. Specifically, we would like to differentiate between "warm" and "cold" cultures in terms of the need for emotional experience and emotional expressiveness. We believe that "warm" cultures will be those that in social interactions experience and express more emotions than "cold" cultures. The need to experience and express emotions in social interactions should lead consumers in "warm" cultures to prefer environments that allow for more interpersonal interaction with people. We believe that this preference will also transfer to the shopping environment. Thus, "warm" consumers should prefer to shop in physical stores more than the "cold" consumers because they can have higher interpersonal interaction with salespeople and other consumers. In this research project we would like to pursue the following questions: (1) can we differentiate cultures in terms of emotional experience and expressiveness? (2) do consumers from cultures with less need for emotional experience and expressiveness (colder cultures) prefer to shop more in web stores and consumers from cultures with more need for emotional experience and expressiveness (warmer cultures) prefer to shop in physical stores? (3) can this difference in shopping preferences be explained by cultural differences in preferences for interpersonal communication with salespeople and consumers, which we define as human interactivity in our typology of channel interactivity? We have collected data from samples of MBA students in Finland (presumably a "cold culture," Chile (presumably a "warm" culture), and the United States. We plan to input and analyze the data, soon.

Since graduating from Michigan State with a Ph.D. in Marketing and a Minor in International Business, all of my research, including current and planned projects, is international in its scope. I have a passion to learn about and to experience other cultures. Moreover, I seek to stimulate and help others to appreciate, understand, and to skillfully practice international business.

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APPENDIX (WITH ROBERT MACKOY)

