MARKETING ACTIVITIES OF AMERICAN BIG BUSINESS IN CHINA: STANDARD OIL COMPANY AND BRITISH-AMERICAN TOBACCO COMPANY 1890-1930

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ABSTRACT

This paper explores the major marketing activities of two successful American companies--Standard Oil Company and British-American Tobacco Company, in China between 1890-1930. Unlike their counterparts, these companies exerted significantly more effort to understand their customers, and to build and strengthen their product accessibility and acceptability in China.

THE "MYTH" OF THE CHINESE MARKET

Several historians of sino-American relations believe that the Chinese market was hard to penetrate for American businessmen between 1890 and 1915. They described that many American firms entered the market with high expectations but always ended up with a very small amount of sales (Dennett 1922; Varg 1968; Young 1968). Varg described the China market during 1897 to 1912:

> ...circumscribed by inaccessibility to interior, by aversion to Western style products, by poverty, and by an unfavorable balance of international payments, a dog-eat-dog fight for sales and contracts raged. Germany, Great Britain, France, Russia, and Japan were more dependent on foreign markets than the United States; the Governments of these nations gave their business enterprises greater support than did the United States and, most important, the business enterprises of these countries demonstrated greater energy and initiative in China (Varg 1968, p.41).

The general thought held by the historians is correct to a great extent. From the per capita income perspective, China was poor. Its transportation system was also sparsely developed at that time. These market limitations, combined with less effort by American enterprises and less support by their government than that of other countries, resulted in rather unsuccessful exporting attempts of many American firms during that period. Nevertheless, some American business enterprises did make excellent progress in the Chinese market at that time. The successful ventures of the American tobacco tycoon, James B. Duke, and Standard Oil Company are good examples of these exceptional cases. China had become one of Duke enterprise's greatest outlets after it entered the market. As early as 1916, his joint enterprise with Great Britain, the British-American Tobacco Company (BAT), enjoyed 20.75 million (U.S. dollars) sales volume with a net profit of 3.75 million in the Chinese market. BAT cigarettes were sold at a rate of more than a billion per month (Cochran 1980).

China also was the largest Far Eastern market of the Standard Oil Company by the end of the nineteenth century. American kerosene accounted for more than fifty to eighty percent of China's total import of kerosene during the period of 1890 to 1930 (Ho 1935), and Standard Oil was the major American exporter of the kerosene at that time (Cheng 1986; Wilkins 1970). The Chinese market

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(including Hong Kong) represented 15.5 percent of Standard Oil's total export in 1910 (Wilkins 1986). Carl Crow, an American advertisement specialist in China, stated that, "It was always a question whether his enterprise [British-American Tobacco Company] or that of the Standard Oil Company was the best [of foreign companies in China]" (Crow 1940, p.56).

These two companies paid special attention to the Chinese market in marketing their products. They both ran into the long-established customs and ways of doing business in the Chinese society. Nevertheless, they went out with a very fruitful result in that market. Unlike their counterparts, these two companies exerted significantly more effort to understand their customers, and to build and strengthen their product accessibility and acceptability in China. China, in reality, was not inherently against Western-styled products if the marketer could adopt his products to fit in the specific needs of the market.

The key purpose of this paper is to present examples of successful American companies and to show how these American firms succeeded in the Chinese market. It is not intended to argue how prospective the market in China was at that time. In fact, the total Chinese market was not as big as western people then expected. For example, although exports of the United States accounted for fifteen to twenty percent (in Haikuan Taels) of China's total imports, it only represented around three percent of total U. S. exports (Ho 1935).

Before discussing the marketing activities these companies practiced to achieve their success in China, it is necessary to understand the general market situation in the Chinese market from 1890 to 1930. This may explain why many historians believe that the Chinese market was a "myth" at that time.

THE GENERAL BUSINESS CONDITION IN CHINA 1890-1930

Import Trade Condition

The opium war of 1842 with Great Britain caused China to open its door to the world. The direct product of this war, The Nanking Treaty, not only marked the beginning of the open-door policy, but also caused China to lose its autonomy over its own tariff and subsequently gave special rights to foreign countries. Because of the low taxation, the Chinese market was flooded with imported goods during the late nineteenth century (Ho 1935).

Prior to this time, China showed no true motivation in trading with foreign countries. It limited trading activities to a few selected ports and required all foreign traders to submit to the Chinese law and authority. The Nanking Treaty marked not only the beginning of the open-door policy, but also the beginning of subsequent special treaties with foreign modernized countries (Clark 1932; Ho 1935). The treaty required China to fix its custom tariff at a flat rate of 5%. The following treaty, the Tientsin Treaty, added another provision that a transit due of two and half percent was imposed on imported goods, which once paid allowed goods to be transported to anywhere within China without further taxation. In addition to the lost tariff autonomy, China also granted several other trade privileges to modernized foreign countries in the Nanking and subsequent treaties. These privileges included (1) coastal and inland navigation rights, (2) factory establishing rights (Treaty of Shimonoseki 1895), (3) new and more treaty ports (including granting Hong Kong to Great Britain and Taiwan to Japan), (4) Most Favored Nation Treaty (i.e., any privilege granted to one country must also be given to all other countries having treaty relations with China) (Fairbank 1953; Ho 1935; Williams 1863).

Under this kind of trading situation, the price of foreign goods was very competitive compared to that of the Chinese counterpart in China. Some foreign products sold even cheaper in China than they sold in their parent countries. For example, cigarettes exported from the United States did not have to pay the internal revenue stamp. The price of the American cigarettes in China was less than half of what consumers paid in the United States (Crow 1940). Moreover, the product quality of modernized foreign countries was normally better than that of Chinese domestic production since China was still underdeveloped at that time.

China, with its population of four hundred million, was very attractive to the exporting firms of modernized foreign countries (Crow 1937). However, since the Chinese market was open to most modernized foreign countries, the key competitors of these foreign exporting firms weren't the Chinese counterpart, but rather the firms from other modernized foreign countries. Under the same high expectation, the number of trading firms of these modernized foreign countries was increasing rapidly during the late nineteenth century, and thus, the competition among modernized foreign countries became very keen. The competition was even sharper after 1899 when the number of foreign firms increased more rapidly than did trade itself (Remer 1926). As Carl Crow stated, "....Probably 500 brands of cigarettes could be counted in the stock of a store in any large city [in China], and the brands of toilet soaps, perfumes, and cosmetics run into the hundreds" (Arnold et al. 1926, p.191). Therefore, many foreign businesses were forced to operate with slim profit margins. Remer (1926) described an interview with a merchant that he had in Tsingtau in 1913. The merchant complained that, "the competition of national groups was making business unprofitable, and that he was obliged to handle goods at a margin of one percent" (Remer 1926, p.127). Julean Arnold (1926), the Commercial Attach'e of the United States, in describing the Chinese market at that time also wrote, "in China, competition is international in character, so that no American manufacturer need feel that his product has a monopoly claim on the market" (Arnold et al. 1926, p.363). This is the first reason that many foreign traders, with high expectations for the Chinese market, wound up with poor results.

Special Business Customs in China

To a foreign company, the Chinese market was a place full of opportunities, yet full of difficulties. Due to the almost closed door policy in China before the opium war (1845) the business methods, organizations, and infrastructure of China were markedly different from that of western modernized counterparts. This special business environment developed from its special culture, political and economic environment.

The guild system had long been seen as one of the most powerful organizations in the Chinese market. For centuries, Chinese learned to expect little from the central government. They had to perform the function of local government to manage their local affairs since there was no definite body of law, no reliable machinery for the execution of the law, and no confidence in government. The guild system was developed to protect the business interests of the participating members (Arnold et al. 1919). The influential potency of the guild system in China was far more powerful than the business people of the modernized foreign countries had imagined. The system could exert a peculiar power to affect the arbitration in the commercial dispute between members, prevent extreme competition and provide standard business practices. Even the rules of storage, commission, weights and measures, taxes, fire loss, and fictitious selling and buying were governed by the guild. Commercial history is replete with examples of guild systems boycotting opposing foreign companies. The results were always effective at bringing the offender to terms (Eldridge 1923).

In addition to the special guild organizations that prevented the foreign traders from quickly building their businesses in China, the need for transportation of goods to the interior, the fluctuation of currency based on the world price of silver, the lack of credit information of the buyers, and the language communication problem were the other initial problems that foreign traders had to tackle before entering the market. The comprador was, therefore, grown out from these demands.

Generally speaking, a comprador was an agent who served as a medium between foreign firms and Chinese dealers. The word itself was used with much confusion throughout its history in China. A comprador could be a house steward, a linguist, a business assistant employed by firms, or a commission-based agent. If he was a commission-based agent between Chinese dealers and foreign traders (Hao 1970, p.64-65), he worked just like a "Chinese manager and credit man of the firm with which he is connected and the guarantor of all native accounts" (Guaranty Trust Co. 1919, p.9). He would not only provide the needed market information, but also would have the responsibility to guarantee the payment on the due date by the Chinese counterpart on any order countersigned by him. Therefore, for a new foreign trader, the commission-based comprador system could handle all the marketing effort and assume much of the business risk in the Chinese market. On the other hand, if he was hired by a foreign firm, he might be a linguist and business assistant who would help negotiate with Chinese dealers and explore the market opportunity (Arnold et al 1919; Hao 1970).

With the trade activities significantly increased between foreign countries and China, the foreign trader and Chinese businessmen became more knowledgeable about each other. The function of the comprador, especially the commission-based comprador, began to diminish and even to be challenged. The major disadvantage of using compradors was their limited client base and lack of risk-taking attitude. Arnold (1919) stated that, "there is a very noticeable disadvantage in having to depend upon a comprador. He cultivates a certain clientele- a circle of friends" (Arnold et al. 1919, p.257). F. S. A. Bourne (1898), a consul of the United Kingdom, also stated that, "because the comprador in his ultra-conservatism, will not venture in any new direction, and discountenances all and sundry fresh departures in which he has only personal risk" (Bourne 1898, p.329). Therefore, although a commission-based comprador might be a good medium for a foreign firm to start business in China, his existence might also be hinderance for foreign traders trying to gain extensive distribution in the Chinese market. In the later discussion of the two successful companies, one can see that both firms followed very shrewd strategies to cope with these problems.

Chinese Customers

The customers in China were extremely conservative. It took a long time for them to accept a new "chop" or trademark in the market (Arnold et al. 1926). The slow path of diffusion in the Chinese market always caused the Western traders to feel hopeless during the early introduction stage, especially for the American who were accustomed to capture trade by rapid advances in their domestic market (Guarantee Trust 1919, p.24).

The Chinese consumer, however, had high brand loyalty. Once a "chop" or trademark was well accepted by them, it was very difficult for them to switch brands. They wouldn't replace their usual brand unless there was another article with conspicuously higher benefit and much cheaper price (Eldridge 1923). Crow (1937) stated, "...once they have become accustomed to a certain brand, no matter whether it be cigarettes, soap or toothpaste, they are the world's most loyal consumers, and will support a brand with a degree of unanimity and faithfulness which should bring tears of joy to the eyes of the manufacturer" (Crow 1937, p.21).

With these special characteristics and a high illiteracy rate in China at that time, a well known "chop" or trademark was very important for the Chinese in their purchasing decision. The foreign trader had to be very sensitive in creating an easily remembered and unoffensive "chop" or trademark, and to advertise it in as many ways as possible to establish its reputation. The function of advertisement was, therefore, more for reputation building than immediate purchase inducement.

From the above discussion, the reader can easily understand why so many historians proclaim that the Chinese market was, in reality, a "myth". The Chinese market was a "myth," because a new foreign enterprise could not easily enter and sustain under the keen competition among different firms of modernized foreign countries. They also could not easily get accustomed to a totally different business system.

The two companies discussed below, however, successfully built their business empires in the

Chinese market. They came to China with optimism and treated it with great care. The results were very fruitful.

THE STANDARD OIL COMPANY

As early as the 1870s, Standard Oil had already sent many representatives to travel abroad to gather information on foreign markets (Tarbell 1904). William Herbert Libby who was described as, "a personable and cultivated representative, an experienced merchant of oil, an astute observer of trade, an able judge of man, and a tenacious negotiator" (Hidy and Hidy 1955, p.137), began his first major foreign assignment since he joined the company in 1878. He spent four years in the Far East evaluating market conditions in those markets.

At that time, most of the Chinese population lived in rural areas. Normally, there was no electrical system for lighting in those areas. Cheap and reliable lighting equipment might have high market potential. This was the key reason that Standard Oil believed that the China could be an important market for kerosene. However, there were still many specific marketing and environmental issues that Standard Oil had to solve before it could realize this estimation.

First, the normal lifestyle of Chinese who live in the rural areas was "get up at daylight and go to bed with the birds." The use of artificial illumination was frequently associated with some immoral activities such as gambling, prostitution, and drunkenness (Crow 1940). Crow gave an example of the resistance to establishing an electric system in Shanghai. He stated that, "The prejudice against interference with the routine of nature persisted for years. When an electric lighting system was established in Shanghai the taotai sternly threatened to punish any Chinese who installed this new foreign device" (Crow 1940, p.48). This kind of attitude might have developed from the long lack of economical and safe lighting equipment in the Chinese market. To most Chinese, only abnormal people would need to conduct activities at night. If there had existed an economical and safe lighting system for them, this kind of consumer belief would have been changed. Due to this special environmental and cultural situation, the Chinese needed time to change their attitude even though cheap and reliable equipment was already available to them. Second, the kerosene had to compete with other existing lighting devices such as candles and vegetable oil. Although candles and vegetable oil were not safe, they were very economical since they could be used in a rather inexpensive lighting container. In addition, the products themselves were not expensive. Third, as discussed before, Standard Oil had to spend much effort in establishing its distribution system because of the guild and interior transportation system problem.

In order to solve the problems mentioned above, Standard Oil and its agents first introduced the Mei-Foo lamp, a safer and reasonably priced lamp for kerosene lighting. It sold for a few cents. The lamp could not only provide one candle power illumination, which was as much as the usual power that the Chinese required, but it also produced light for 240 hours using only one gallon of kerosene. Therefore, Standard Oil successfully brought down the total cost of the kerosene lighting system to the same price range of its competitive substitutes; i.e., the candle or vegetable oil (Arnold et al. 1926; Crow 1940; Hidy and Hidy 1955).

Standard Oil also took steps to improve its distribution system. In 1890, Standard Oil, instead of depending on merchants to export its product to the Far East, started to make some consignments in that area through the Anglo-American Company, an affiliate of Standard Oil Company. Three years later, it established its own Asiatic Station- in Shanghai, Hong Kong and other cities in East Asia (Hidy and Hidy 1955; Tarbell 1904; Wilkins 1986). In order to distribute the kerosene extensively all over China, Standard Oil also reversed the usual procedure of doing business in China by replacing the commissioned based comprador with American salesmen (Chen 1986; Crow 1940; Eldridge 1923).

Crow (1940) stated that "for a good many years almost every American steamer that arrived in Shanghai from the West Coast brought one or more young men who had graduated from the training school maintained by the company [Standard Oil] in New York" (Crow 1940, p.49). Almost all the salesmen had college degrees and were carefully selected before admission to the training school of the Standard Oil Company. When they arrived in China, they first worked as an assistant to a senior manager, and later were placed in charge of their own stations. They were required to learn Chinese and travel all over their assigned territory to negotiate and qualify potential Chinese agents and dealers (Crow 1940). Standard Oil, thus established an exhaustive Chinese distribution system.

Moreover, this extensive distribution system also combined with flexible adjustment to the specific needs of the local condition. Hidy and Hidy described the ingenuity of the local station managers:

> ....In Swatow the most prosperous merchants were agents for competitors, and severe price cutting in the jobbing market followed attempts to introduce Standard Oil's kerosene. Its agents constructed bulk storage, appointed native "consignees," bonded them, and reported sales of these agents and their subagents to have risen from 8,000 to 400,000 cases from 1906 to 1911. In some places, as in Wuhu, for example, the hand of the New York company extended into street peddling (Hidy and Hidy 1955, p.552).

The distribution system established by Standard Oil surmounted the low coverage drawback of using compradors, and also avoided interrupting the traditional guild trading system. Standard Oil did not discard the traditional Chinese channel system. It still counted on the local agents and subagents to contact the final customers and consumers. The major task that Standard Oil tried to do was to shorten the length of the channel and to have better control over the coverage of its distribution.

Due to the exhaustive salesmen placement, Standard Oil had thousands of dealers and agents all over the Chinese market. This contributed to the major success of the Standard Oil Company in China. Arnold stated that, "aside from the naturally expanding demand resulting from the increasing purchasing power [of kerosene] in the country, the growth of this business is due almost entirely to the increased distribution that large American and British oil companies are effecting throughout the interior" (Arnold et al. 1926, p.88).

Although distribution was the key factor in the success of the kerosene business in China at that time, advertisements did serve as an important vehicle for establishing the "chop" or trademark of the company in the consumer's mind and educating the Chinese to use kerosene. The Chinese consumer, to a great extent, was illiterate. The name and symbol of "chop" was a very important communication media between the brand and the consumer. Therefore, Standard Oil carried on an extensive campaign by using posters to establish its "chop" in the Chinese mind (Guarantee Trust 1919). Moreover, in order to educate the Chinese to use the new substitute, the Standard Oil Company focused the pursuing point of its advertising on real need (Arnold 1919 p.387).

Strategically, Standard Oil also acted proactively in adjusting its marketing strategy. During the price war with Russia and other Western counterparts, Standard Oil introduced a second-grade cheaper American kerosene, Pelrolite, branded as Eagle to compete in the low price segment. To reduce the transportation cost, it also erected bulk stations in several centers near the seaports around China and distributed the oil by tank barges to other distributing points for further distribution. It also operated plants in China for manufacturing tins and cases, and casing their own oil for the convenience of further distribution into the interior China (Arnold et al. 1926; Hidy and Hidy 1955).

Finally, to facilitate the response timing of the specific market situation, Standard Oil adopted a decentralized corporate structure. In China, the general manager had a good deal of freedom in marketing decisions. He did not hesitate to recommend new initiatives and to comment on the effect of any new policy emanating from the New York headquarters. As Hidy and Hidy stated "[The local company of Standard Oil] had great deal of its own local color" (Hidy and Hidy 1955, p.549).

THE BRITISH-AMERICAN TOBACCO COMPANY

The British-American Tobacco Company was formed after a "tobacco war" between the American Tobacco Company and Imperial Tobacco Company in 1902 (Wilkins 1970, 1986). Although the company was registered in London, it was actually an American entity. Americans held 12 out of 18 positions on BAT's board of directors and possessed two-thirds of the company's stock. In addition, the first two managing directors in China, C. E. Fiske and James A. Thomas, were both Americans (Cochran 1980).

James A. Thomas, one of Duke's most trusted subordinates, became the managing director of BAT China in 1905 when James B. Duke planned to begin its major investment in China. Thomas also possessed similar characteristics and background as Duke had in the tobacco industry (Cochran 1980). Therefore, the managerial link between the headquarters in New York and Shanghai was firmly built.

Before BAT entered the Chinese market, the trade of the cigarette was mainly through the commission-based comprador. The importer had no knowledge about the market demand (Arnold et al. 1926), and the initial focus of the sales effort was on the foreigner and foreign sailors in China (Crow 1940). BAT was one of the first foreign tobacco companies that exerted major marketing efforts through its own hand in the Chinese market. The major problems BAT faced were similar to those of the Standard Oil Company. First, it had to change the smoking habit of millions of Chinese. At that time, most Chinese smoked a water pipe that was filled with tobacco and lighted for every puff (Crow 1940). This task might be easier for BAT than that of Standard Oil because the cigarette is more convenient to smoke and it requires no complement product, as that of kerosene. However, time was still needed for the Chinese to change their tastes and smoking habits. Secondly, BAT had to build up an extensive salesmen network to sell their products to the local dealers all over the Chinese market. Thirdly, BAT also had to establish its "chop" or trademark in the Chinese mind to build its brand loyalty.

Similar to Standard Oil, BAT hired and trained bachelors under age twenty-five in the United States and sent them to China. They urged their salesmen to learn Chinese by giving incentives. The salesman normally had to travel to every county and hamlet in his territory to contact and build up the distribution system. To improve distribution efficiency, BAT developed a regional approach. It established several distribution centers around China. From the distribution center, the cigarette was delivered to any interior and rural area around China (Cochran 1980). This system successfully distributed cigarettes to every local area in China while relying on local Chinese dealers in their allocated territories. In addition, BAT also effectively used its Chinese business assistants in searching for suitable merchants to be served as its agents or dealers. (Arnold et al. 1926; Cochran 1980).

As discussed, an established "chop" was very important for the Chinese market due to the substantial illiteracy rate. In order to build up a well known "chop" or trademark, BAT spent a lot of energy and expenses in advertisement. It could be claimed as the most extensive advertiser at that time (Guaranty Trust 1919). Its advertisement left almost no place of China uncovered. In many cities, BAT placarded its poster in almost every part of the city (Cochran 1980). In addition to the normal advertisement methods employed by other companies at that time, BAT also used some creative ways to advertise its products; e.g., the company gave away a small rug to jinrikisha collie to fit the bottom section of the jinrikisha where the feet of the passenger rested when riding. The rug, printed with the "chop" of BAT's brand, became an active advertisement for every passenger who took the jinrikisha (Arnold et al. 1919). In 1922, BAT began to produce movies on its own for the purpose of promoting its cigarettes. The "chop" and name of BAT's brands were shown at the foot of every subtitle in every frame of every film. A network of theaters was established for BAT to control the time and place for a specific film to be shown (Cochran 1980).

BAT also owned its own printing factory so as to print its advertisements. The factory, equipped with the imported printing presses, provided the most sophisticated printing facility in China at that time (Arnold et al. 1919; Cochran 1980). To enhance the acceptability of its advertisements in China, BAT hired Chinese artists and calligraphers to design and draft the advertisement, and hired Chinese directors to participate in the production of their films since they found that Chinese directors had a better knowledge of Chinese traditions and local customs. Moreover, they were more sensitive to the popular imagination (Cochran 1980).

In addition to focusing on the distribution and advertising, BAT also tried to keep its cost down by investing heavily in building factories in China for having a mass production efficiency in producing the cigarette. This followed the same approach as that of the Duke's enterprise, the American Tobacco Company, in the United States. By 1915, BAT already employed 13,000 workers at the factories in Shanghai, Hankow, Mukden, and Harbin (Cochran 1980; Crow 1940). BAT also encouraged Chinese peasants to plant bright tobacco to reduce the transportation and labor cost. It not only gave away the free seeds to the Chinese peasants, but it also promised to purchase their harvest regardless of the quality and it might reimburse for any damage and loss that might be incurred from the planting of the American seeds. In 1913, BAT procured the first Chinese grown tobacco for producing its cigarette in China (Cochran 1980).

DISCUSSION AND CONCLUSION

Although the companies discussed above were in different industries, they did possess some similar traits in dealing with the Chinese market. First, the top management strongly supported establishing the local branch. Both companies sent very important executives to China to either gather market information or to conduct direct negotiation and management. These firms had strong management links between headquarters and the local offices. Second, both companies reversed the usual way of doing trade business in China by establishing their own distribution system, while also utilizing the traditional Chinese channel system without discarding it. Third, they both used the modern marketing methods (e.g., modern advertisement techniques) adjusted to fit in the Chinese society to educate the Chinese people and establish awareness in the Chinese mind. Fourth, they both responded to the market proactively. Headquarters allowed the local administration to adjust its marketing method to fit in the specific local condition. Fifth, both firms worked actively to seek ways to improve the production and distribution efficiency for better competitive advantages. These five traits are the major reasons that they succeeded in the Chinese market.

Finally, two additional points need to be addressed here. First, the reader may notice that both companies are consumer product companies. This could be the reason that they both received favorable results by using similar way to explore the market. During that period, the United States also represented a significant position in China's raw material product imports (e.g., cotton, iron, and steel) (Ho 1935). These products, however, were mostly sold through the commission-based comprador (Arnold et al. 1919; Eldridge 1923). Another product that interested the American businessmen then was the railroad construction. The promotion of this product involved a lot of political considerations and negotiations between China and the modernized countries (Dennett 1922, Young 1968). Secondly, the consumption ability may be another reason for the success of these products. Due to the poor income condition, Chinese required a low unit price product to be able to consume. Although the Chinese per capita consumption might not have been as high as in the modernized countries, but the huge population in China could still generate a high sales volume.

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