





In a Foreign Land

—To Moderate or NOT

Is the Question

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Many of you have had or will have the problem of using foreign moderators on an international study because you do not speak the language.

Much of the success of an international project is whether you can find experienced moderators who are familiar with the type of research you plan to do and who are available. Researching the “right” moderator is also where your time (which is not always adequately built into the budget) can expand exponentially. This entails finding the moderator, checking his (or her) bona fides, assessing his language skills, steeping him in the objectives of the study, training him in your specialized techniques, etc. These problems only get compounded as the number of countries increases.

For instance, here are a couple of sample situations:

- You get good information from one country, but very superficial information from two other countries. How can you be confident of the data you have gathered? What do you recommend? How do you help your marketing team make decisions about how to move globally?
- You specialize in projective techniques and have worked long and hard at honing your skills to get deeply under the skin of respondents in the United States. Unfortunately, the moderator in Argentina has no idea what you are talking about and, while willing to comply, is ill at ease with asking consumers or, worse yet, Argentinean doctors to close their eyes and imagine a guided fantasy.

How can a person who can't speak the language do a study across five countries and make more reliable judgments about what he has heard than by using local moderators?

The impact of these kinds of problems on the research outcome is worse, the better the principle moderator. When moderators are less experienced, they tend to do what everyone else does. Their skill level is not that different from many others like them. However, as moderators progress through their careers or obtain specialized training (in, say, anthropology or psychology), they are better prepared to penetrate the minds of their interviewees. When their skills can be utilized only over 25% of the data and when a variety of moderators become part of the data-collection task, the results are compromised.

If you were to use 25% of your blood and 75% of other moderators' blood to determine the genome of a professional qualitative researcher, the lab would throw out your conclusions. Each person must have his or her own genome mapped out, and then these genomes can be aggregated to see what qualitative researchers have in common. When moderators are mixed during a study, the results become cloudy.

In some ways, the more skilled the moderator, the more he or she is the data. It's not that skilled moderators self-reflexively see themselves, but quite the opposite. They know how to enter the person's data stream without causing ripples. The clear stream holds the answers. When less-effective moderators use a technique developed in a Western culture, there is frequently a reduction of quality information. The extremes or the unusual moments, where great insight hides out, get lost, and the observations often regress to the mean. The unique benefits of a highly skilled moderator get muddled in international conflicts.

Many of the larger international research houses or advertising agencies have qualitative moderators on staff to make international studies easier to do and to be useful to the companies using them. *Beware of convenient solutions.* Being able to get multiple moderators does not mean that you have solved your problems. Being easier always comes with its own particular cost. Frequently, these moderators are young, poorly trained and doing many projects at once, without fully understanding the goals and the techniques necessary to accomplish those goals. They all are trained to say "yes"

because once you have begun the study, there is little that can be done to alter or fix a weak moderator. Frequently, your complicity is exacted because if you complain too loudly, the ax also falls on you for not having found the best person for the job.

The Solution

If I have to use a local moderator (frequently driven by the client's political sensitivity of not wanting to upset the local market's sense of personal pride and/or the desire not to interview English-speaking members of that culture), I prefer to use someone who is a small independent businessperson, like a member of QRCA. This is a hands-on person who personally conducts the research and writes the report. She may have had agency or client experience (all the better), but she is now working on her own. Her success is always as good as her last project. Quality, therefore, has a built-in incentive and tends to remain high.

For example, I have worked in the beer category for more than 25 years and across five continents. I remember a consultant from England who sought me out for an English beer being introduced into the U.S. market; he wanted my breadth of experience and an independent perspective. He spent the time to research the qualitative market in the U.S. to find someone who would not be beholden to an existing point of view. I like to do the same in reverse when I am working in a foreign market.

Rather than using a local moderator in a foreign country, I prefer to do the groups myself. Part of it is a control issue. Keeping the variable of the moderator constant across countries, even with the language barriers, will allow the research design to generate a more reliable and predictive set of conclusions than to use different moderators. The consistency of the data is greater because the presentation is more regulated and because the objective and techniques are always clearly understood.

Heresy, you say? How can a person who can't speak the language do a study across five countries and make more reliable judgments about what he has heard than by using local moderators? We don't always want well-educated, local interviewees who speak English. Most foreign marketing problems occur in their own language and need to be addressed in that language. So how do we get around the language problem?

The obvious problem with doing the groups oneself in foreign countries is that things may get "lost in translation." Many translators have a relatively limited English vocabulary. If something is said by one person and a second person offers a slightly different interpretation, although the translator will understand the difference in the native language, he or she may have only one or two ways of expressing the meaning in English.



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For instance, as many of you have noticed if you have done research in Japan, it is remarkable how many times a Japanese housewife will say that something is “cute.” “Cute” is a popular term, much like “cool” is in English or “brilliant” is in Great Britain. It stands for many things and has many slang usages. Getting a Japanese translator to differentiate the degree and importance of “cute” for the packaging of a facial cleanser can be a challenge.

My solution (and I think it has been a good one) is to look for a different type of translator. Instead of looking for a well-trained, independent moderator, I look for a well-trained, linguistically experienced translator. I like ones who have learned English in their own country (one type of training), have lived in the U.S. for a while, perhaps have also gone to school in the U.S. (a second type of training, with more emphasis on slang), and have a large vocabulary and a facility with nuance of meaning, accent and inflection. Being playful is also a useful skill in a translator.

What I am looking for is a potential moderator in a translator. I want someone with great people skills, a sense of humor and a command of the English language so that he or she can help me co-moderate the groups without having to think, “What is the word in English for...?”

This solution is not a shortcut. You need to build in enough time to search for the right translator, just like you would have had to look for a great moderator. However, the upside is that you only have one moderator bias to factor in — yours. The data collected will be richer and more consistent, and your interpretation of that data will be more valid. You will feel more comfortable projecting your results across different countries. You will be able to stand up and argue a point of view with clients who are not sure which way to go, with greater confidence and with better evidence to support your point of view. Where there are inconsistencies (and, across different cultures, there will be), you will be more able to speculate why those inconsistencies occurred and offer more rigorous potential solutions.

Finding the Translator

I like to interview the translators over the phone more than once. It can be a somewhat formal initial meeting with some challenging questions and several later


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phone calls about the guide, the facility to use, directions or other questions that help to make the two of you more comfortable together (and you more confident that his or her command of English is what you need).

Here are some examples of follow-up questions:

- "Give me a synonym and antonym for the following words..." First do this in English, and then take some of the words mentioned and ask for further synonyms and antonyms. This will allow you to see the speed, facility and depth of the translator's vocabulary. At some point, using a dictionary in his native language, ask him to do the same thing in his native language. While you won't necessarily understand his answers, you can listen to how quickly he can do it in his own language and ascertain a baseline for his language skills and, by comparison, where his English skills lie. If he speaks other languages as well, have him do those languages to see where his English lies (as his second, third or fourth language).
- "Can you give me five different meanings for the word 'cute' as it would be applied to a new package for a soap that is gentle on an Asian baby's skin?"
- "What do you think about... [choose a current event]?" See how hip he is to popular culture. You don't want someone who only knows the academic world.

Good places to look for referrals are from international law firms, embassies and local university graduate programs. Focus group facilities may have some leads, but (in my experience) their referrals have been mixed. I once even used a local moderator as a translator because her English was so good.

Once you have found someone you think is qualified, then you have to see if he or she has had experience with both simultaneous and sequential translations. A sequential translation is where the translator listens to the question in English and then repeats it in the native language and then vice versa. Sequential translation takes a long time to communicate and is very boring. A simultaneous translation is where the translator listens to part of the question in English, then starts the translation while listening to the rest of the question in English and then finishes the translation in the second language.



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The brain works differently in each case. In a simultaneous translation, the person must be able to listen, translate and speak, all at the same time without losing his or her place. Those who have this skill are viewed with greater status and are perceived at a higher level of language competency. They are the ones who hold jobs where the accuracy of the translation is essential, such as in diplomatic relations or negotiations.

The question to ask is whether he or she would be willing to do a combination of simultaneous and sequential translation. This might cost slightly more money, but it is worth it. Usually, it is not a lot of extra money because translators work by the hour.

What this allows the moderator to do is to lead the group, knowing a few words in the native language and relying a lot on the nonverbal signs of positive and negative reactions. I usually say that I have been studying the participants' language for a while and can understand it much better than I can speak it. The translator is there to be my voice.

Working Together

I ask the translator to become a co-moderator of the group. He or she will know my questions beforehand and what I am trying to accomplish. If some of my questions have no clear translation or are inappropriate for that culture in some way, I ask the translator to help me fix those questions before or during the session. We start out with a sequential translation of my introduction and what we will be doing. The translator describes our respective roles in accomplishing our goal.

Once you have found someone you think is qualified, then you have to see if he or she has had experience with both simultaneous and sequential translations.

We laugh about how silly it will all seem, but once we get going, the self-consciousness breaks down, just as in any group.

Then, as we get started, the translator starts simultaneously translating my questions and the group's answers. This has the amazing effect of not only shortening the time, but also making the time feel almost like real time. You nod as the respondents talk about how much they like the ad,



package or whatever, and they think you understand what they are saying (and, with a slight delay from the simultaneous translator, you do). The group will orient itself to you, as well as to the translator, and the two of you begin to merge into one, like a horse and rider. The excitement is palpable. You can feel the respondents' pleasure at being understood by a foreigner from the United States. They have many feelings about the U.S. and the products or advertising they receive from America. They get an opportunity to express themselves on a global stage, and the recognition that they have an interested American listener is quite heady.

It is all right if the respondents start to orient to the translator (since he or she can speak the language). However, don't let the translator take over. You are still running the group. You are asking the questions. Look at the respondents as you ask your next questions. Use the respondents' names as you ask the questions so they know you want their response and then let the translator tell them what you just asked. They will answer *you*, and the translator tells you what they said. Smile knowingly and appreciatively to them for their insight and helpfulness. It should be a co-moderated group, not one led by the translator. The translator may ask a follow-up question on his or her own that clarifies what the person was saying and then translate that to you so you can follow up further, if necessary.

In the case of using projectives, the translator can be very helpful as an example to the group. I explain to her before what I am trying to do, and we practice it beforehand. Then, during the group session, I give her a practice exercise, and she tells the group what my question was. She then answers the projective, so that they can see a good example of what I am looking for. Then I ask the real question, and she translates and encourages the members to dig in and give me a meaningful answer.

One caution to make is that this process is tiring for the translator; it is typically more than he or she is used to or expects. I have done two two-hour groups back to back, with a half hour or hour break, but never any more than that in a day. Most countries don't do more than two focus groups a day, anyway.


The group will orient itself to you, as well as to the translator, and the two of you begin to merge into one, like a horse and rider. The excitement is palpable.



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I have done this procedure in France, Russia, Argentina, China and Japan, all with similar results. Of course, the Japanese are more polite initially, but the outcome was similar. While I continue to get initial push back from my clients, they have all been amazed and pleased with the outcome. To those who continue to be skeptical, I show a video segment from a previous project, showing the procedure and its outcome. Once they see the process in action and how natural it seems to the native speakers, most of their concerns go away. Of course, clients who demand a local moderator get what they ask for.

The primary benefit of being in the room is that you can control the nuances and the client's concerns about particular elements of the project for that country. Clients also have someone they trust and with whom they can communicate. Given how much "dead air" is created by using local moderators who do not fully understand the project or who are not trained to use (or become passive-aggressive about using) projective techniques, arguing for a single moderator across the project makes sense.

Most clients don't really want to use multiple moderators on a project; they just have assumed they can't otherwise get around the language problem. My experience hasn't borne out their concerns. I like to communicate and get around barriers. Circumventing the language barrier is similar to getting people to move from "I don't understand what you mean" to knowing you. 

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