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Lost in Translation

How to Maintain Qualitative Research Standardization

Within the Context of Cultural Relativity

By Theresa Schreiber and Daryl Gilbert

Anyone who has ever traveled internationally or has even placed an overseas telephone call knows the potential pitfalls that come with communicating in a language other than one's own. When vacationing abroad, accidental miscues can result in serendipitous adventures and good stories to tell back home. In business, however, such mishaps can spell disaster: financial losses, upset clients, lost opportunities, and misleading data. That is why Theresa Schreiber and Daryl Gilbert, Directors of Qualitative Research at Leo J. Shapiro & Associates, developed the **Accuracy in Cultural Consistency Monitoring System** ©, or ACC, as a method of maintaining research standards while overseeing international consumer research projects.

Obtaining accurate results in international market surveys is imperative, especially since qualitative research results are so often used to develop quantitative research measurements. Language is only the most obvious hurdle to overcome when doing business in a foreign culture. Researchers must anticipate differences in economic systems, lifestyles and family structures, as well as shopping and consumer habits. As if all these variables weren't enough, each country, and very often, regions within countries, has differing customs that researchers must take into account.

There is no way to codify each variable because the idiosyncrasies between countries are too varied and are continually changing. The **Accuracy in Cultural Consistency Monitoring System** © has been developed as a template that qualitative consultants can use in any international research project in order to ensure standard, consistent measurable outcomes. ACC is applied to all stages of an international research enterprise:

- I. PLANNING
- II. PROJECT MANAGEMENT
- III. CHOOSING AND WORKING WITH TRANSLATORS AND MODERATORS
- IV. INTERPRETING RESULTS AND FINDINGS

Each phase has its own strata of tasks which we'll summarize, in order to form a template that a consultant can use to organize the research project.

PLANNING

The Planning Phase of your project can be divided into the following components: scheduling, managing expectations, choosing a facility, technical compatibility, and budget concerns.

▪ Scheduling

In addition to keeping time zone differences in mind, make sure you know what hours the people you are working with keep. In France, people typically work fewer hours than we do in the U.S., while Japanese workers usually put in more hours. Familiarize yourself with the country's holiday schedule and the cultural habits surrounding those holidays. You don't want to schedule focus groups on days when the children may be home from school and mothers can't attend. In the U.S., you can occasionally recruit people to leave their work and come to a focus group - but in China, a paycheck is so vital that people will not leave their job to attend a group. Chinese women won't travel at night, and Japanese homemakers are expected to be home at the dinner hour to prepare the family meal, so groups must be scheduled during the day, when childcare is available. Researchers in other countries must be prepared to schedule group times around their respondents' availability, or results may be hopelessly skewed.

Finally, time differences and travel fatigue are very real and, if ignored, can undermine the outcome of a project. Plan for time to acclimate yourself, once you arrive in the country. On the second day, meet with the moderator and the translator and tour the facility; the third day is for reviewing any changes and having groups meet. The fourth day is spent following up with the moderator and flying home or on to the next city. Traveling to your destination over a weekend can be helpful if you have a tight schedule.

▪ Managing Expectations

Expect that establishing specifications and getting the costs back are going to take more time than putting together domestic costs. Often, the facility on the receiving end of your request for proposal has questions or is unclear about your plans, and it may take a few days to clarify the specifications for your project. Certain follow-up services you are accustomed to in the U.S. may not be provided in the host country. It will take time to ensure that confirmation letters, reminder calls, prescreening, and other important details occur.

▪ Choosing a Facility

Locating the right facility for conducting your research requires that you be flexible. Do not assume that your potential venues will be anything like what is available in the United States. If a survey center isn't available, consider using a hotel or a classroom. Ascertain the location of the facility, the size of the room, and the technical specifications that will be available to you. A group room may not have one-way mirrors or even audio for the viewing room. Some facilities rely on closed-circuit television. Also, be sure that recruits will be able to get to the facility location. In some countries, facilities may be so inadequate that it makes sense to establish your own facilities. Because of the large amount of research Leo J. Shapiro & Associates does in China, the President of the firm decided to build a Survey Center in Shanghai. Now, when we conduct research surveys in China, we know that our clients will have confidence in our facilities and they will be better able to concentrate on the research.

- **Technical Compatibility**

Technical capabilities and formats can also vary. Determine that the DVD or tape recording technology you will be using abroad will correspond to your technology back at home. Find out what kind of equipment will be available to you. Is it NTSC, PaL or SECAM? Does the facility you are using have the resources to broadcast the survey group in both English and the native language? Be sure you will have a way to transmit questions to the translator if he or she will be sitting in a different room than you.

- **Budget**

Costs to do the same work in different countries can vary greatly. A project in Japan, China or the UK can cost more than twice as much to complete as the same project in the U.S. When planning your budget, include the time you spend planning the setup, observing, reading through translations, and the time you spend with the moderator and translator, as well as the time you will spend on analysis and reporting. Establish the effect that the currency exchange rate will have on your budget. The facility staff you are working with should be able to suggest local cuisine options that will fit your client's budget. Keep in mind that the focus-group meal is sometimes the only opportunity your client will have to enjoy the local cuisine, so you want the food to be good but reasonably priced.

The success of your international research project depends on how well you plan. The more details you nail down during your planning phase of ACC, the fewer obstacles you will face during the next phase, project management.

PROJECT MANAGEMENT

The project management aspect of ACC will help you make the right decisions as you consider demographics, cultural nuances and recruitment.

- **Demographics**

It goes without saying that you will need to have a keen grasp of market demographics in the country with which you are working. For example, in Shenzhen, China, which has a rapidly growing population of nine million, 83 percent of the population is under age 35! Such a youthful respondent pool may have more aggressive, quicker responses than people in other worldwide cities. Remember that demographic breaks may differ from those we are accustomed to in the States. Age break-offs may have different intervals, for example. Typical childbearing years may be different than those in the U.S. Income ranges can differ too; in Asia there can be as many as 15 different income possibilities. Keep in mind that pure numbers don't tell the whole story. Qualitative researchers know that the key to really understanding the recruitment pool is being able to discern the shades and distinctions behind the numbers.

- **Cultural Nuances**

Cultural differences between two countries can lead to misunderstandings, even when you speak the same language as the participants. For instance, when LJS qualitative research director Daryl Gilbert was conducting a focus group in England about toys, she asked the group where they bought stuffed animals. In response, she received only horrified looks. She quickly asked, "You don't think I mean taxidermy?," and they all shook their heads, "Yes!" It turns out that in England stuffed animals are called "cuddly toys."

Find out as much as you can about the country's cultural norms, work habits, and attitudes toward punctuality, products, and even family dynamics. Attitudes towards products will differ from culture to culture. In France, the cultural acceptance of bacteria as a beneficial agent in wines and cheeses may explain why French women in a focus group are not so eager to embrace a new product that promises to rid a household of all germs and bacteria. Punctuality is viewed as a priority in some cultures, while in others getting somewhere on time isn't as important. In Spain, for instance, people will often arrive late for a group, and in England you might well consider over-recruiting because participants will frequently take a detour to the pub after work and never make it to the focus group.

Understanding the pattern of group dynamics in a specific culture is essential for obtaining good research results. In Japan, for example, groups will work together to maintain harmony, and agreement is important; it can be difficult to get individuals to criticize an idea or product. In China, however, people will enthuse about products from a sense of national pride, because the pace of innovation underscores the country's burgeoning economic development.

Family dynamics add an additional layer of complexity to the recruitment process. In Latin America, participants may bring their whole families to a group and expect reimbursement. In other cases, a husband may presume his own participation in a group discussion is as good as or better than his wife's, and he will try to take the place of his wife, who was the intended recruit. In some cultures, you will be expected to serve snacks or even meals, and in other cultures, facilities may serve alcohol unless directed not to. It stands to reason that in addition to demographics, understanding as many cultural idiosyncrasies and nuances as possible will help in managing the next tier of the project, recruitment.

▪ Recruitment

There are a number of considerations involved in the recruitment stage. How many people can your facility handle? Determine exactly how participants will be recruited. Face-to-face, so that ethnicity questions aren't necessarily asked? Via telephone? In some cases, the usual practice is to network off the members of social clubs; this results in like-minded participants who may all know one another. Make sure attendance confirmation plans are in place and will be carried out, and that honorarium and reimbursement issues have been determined. Familiarize yourself with the country's laws relating to research projects. Respondents in China, for example, are not allowed to taste products or take new products home for trial without prior government approval. Privacy laws in Japan mandate that videotapes and DVDs of groups must be destroyed after six months.

The next step in the ACC process is to find a translator and a moderator, both of whom are critical to the success of your project. They are the filter for what is said and are instrumental in conveying the tone of your questions and concepts. At the same time, they help you and your viewers understand the nuances of the consumers' reactions and help you reformulate your guide or questions if your original communication isn't easily understood. Because these individuals are so important to your project, you should know their backgrounds, understand them well, and develop a good rapport with them.

CHOOSING AND WORKING WITH TRANSLATORS AND MODERATORS

▪ Translators and Translations

Most of the ideas you communicate to your respondents and to your local clients will be filtered through a translator. Does the facility you are working with employ translators, or will you need to make the arrangements? Does the translator have experience working with groups? To ensure accuracy, you might not want to rely solely on the local facility and you may consider using at least one other source. It may be necessary to change wording, scales or descriptions to be more accurately understood in different languages and cultures. Be certain that at least one of your sources understands the issues you are trying to communicate. At LJS, when one of our electronics clients was testing a new product in Japan, the American company he was working with offered one translation, but his inside Japanese speaker said a certain acoustic advantage of the product was not being conveyed accurately. The translation was reworked to appropriately communicate this feature. Allow for time to complete a translation and make sure you have agreement on its accuracy.

▪ Moderators

While it's certainly to your advantage to have a moderator who speaks English as well as the native language and/or dialects that your group speaks, you can succeed with a non-English-speaking narrator when you have an excellent translator. Local moderators can help you sift through cultural nuances, customs, and attitudes that will improve your relationship with the focus group and viewers. Moderators can help you manage dominant responders and non-responders.

Communicate your expectations in advance, to help minimize interruptions during the actual discussions. Even if the moderator has already reviewed and perhaps even translated the discussion guide, spend several hours prior to the groups to review your intentions, share your learning on the topic, and perhaps even rewrite part of the discussion outline. Important areas to include are the overall objective of the project; how much time should be spent on each section; identification of discussion priorities so the moderator knows where to really probe the group, versus what the group can just touch on briefly. Finally, sharing experience and knowledge gained from previous groups in the U.S. and in other countries is helpful in providing the moderator with the big picture. It is also a good way to stimulate discussion about possible cultural or linguistic differences that could impact your presentation.

Schedule enough time to meet with the moderator and translator prior to the groups so that you can address these issues fully. Include the backroom translator in your prep meetings with the moderator. The translator's English may be better than the moderator's, and listening to your instructions and background information will also improve the translator's understanding of the discussion. After the group, meet with the moderator to obtain his or her perspective and to follow up with any questions you have about the discussion. You might even request that the moderator write a top line in addition to the verbal debriefing. A moderator's input can be invaluable to the final phase of ACC, interpreting results and findings.

INTERPRETING RESULTS AND FINDINGS

▪ Language Meaning and Interpretation

Qualitative research of any kind is, by its very nature, highly dependent on language. In an international setting, sorting through idioms, metaphors and other linguistic subtleties adds layers of complexity to

interpreting what people are trying to communicate. The key to clarity in any international setting is to face language problems directly. Work closely with interpreters and local bilingual people in the research field staff.

- Empathy

All successful qualitative research relies heavily on the ability to think and feel from the perspective of the people being interviewed. To develop empathy, spend time discovering how consumers use a product category that you are testing. Visit aisles in stores where the product is sold, observe who is buying the product, and find out how they use the product. Background material on a culture and country is helpful, but watch out for assumptions and antiquated notions that are no longer accurate.

- Class and Cultural Cues

Understanding how “class” and “status” are perceived within a society is paramount to a precise understanding of how your focus groups perceive the product you are testing. People are going to communicate their thoughts and feelings to you through a complex prism of these cultural concerns. Garner insights from local people you are working with about how to decipher class and cultural cues.

Cooperating with the people you are working with abroad, and comparing notes and analysis with them, will bring clarity and understanding to what your group participants are trying to communicate to you and your client about the product you are testing. The myriad of details involved in an international research project may appear daunting at first. By using the **Accuracy in Cultural Consistency Monitoring System** © of dividing your project into these four main phases and following through on the attendant stages of each project, the work will be more manageable and you will achieve the highest quality research standards and results possible.

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