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Moderator Match-Ups: Myth or Reality?

by [Nancy Pekala](#)

Organizations today are increasingly aware of the power of multicultural segments and are looking for ways to engage them. Some (well-meaning) clients are extending this strategy into the world of marketing research by requesting moderators who represent the same background or orientation as the respondents.

Are moderators who share similar gender, ethnicity and backgrounds with their research participants more effective in terms of research outcomes? Is this a trend that is impacting today's market researches? To find out, [Marketing Researchers](#) asked some of the AMA's practicing research moderators to weigh in on this issue.



Tammy Chang, Project Director for Honolulu-based Ward Research, noted that moderator challenges go beyond ethnicity and gender to include regional cultural differences. "In Hawaii, the local culture (regardless of ethnicity or gender) is very different from other parts of the U.S.," she explained. "There are times when a non-local moderator behaves in a way that is considered offensive here, causing participants to shut down and participate less. However, this behavior would be very normal and standard in other cities or states."

She also acknowledged that it is sometimes difficult for moderators to understand the reason for participants' change in body language or mood is due to their own behavior rather than the topic at hand.

"In some cases, this means a local moderator can be more successful in generating conversation and meeting research objectives than someone else as is always the case in international group moderation where you should use a local moderator or one that is extremely familiar with the culture," Chang added. "But ultimately, like everything else, it depends on the subject matter."

Marshall Stowe, Vice President, Martin & Stowe, suggested that shared backgrounds between moderators and research participants do not play a significant role in the research outcome. "As a moderator, I have done groups among many diverse audiences and have never felt, nor did any client indicate, that I did not get all the depth and breadth possible from the research. However, for certain subjects, it is more comfortable for clients or respondents to have a 'familiar face' in the room. I don't think that impacts the findings as much as it impacts the comfort level of the participants."

Stowe also noted that he has witnessed the “familiar face” approach fail when the moderator was chosen strictly for their background or appearance rather than their skill set. “There’s a tendency in our society to think that people are only comfortable with their own type. This is wrong on many levels. This approach can be counter-productive as the researcher enters the room with too many assumptions and it does not give credit to the respondents being interviewed.”

John Fox, of the Cincinnati-based John Fox Marketing Consulting company, noted that gender, age or background of the moderator have no impact on the research outcome. He acknowledged that, as a male moderator/interviewer, he has been asked to work on studies involving doctors, lawyers, bank presidents and heavy industrial products decision makers simply because of his gender. However, he’s also worked on studies with housewives and females who do crafts because the client felt a male moderator could elicit better responses than a female.

“Marketing is marketing,” Fox said. “You can apply the same principles regardless of the product or service being tested. By the same token, there’s no reason why an experienced female can’t talk to doctors, lawyers, bank presidents and heavy industrial products decision makers. However, racial and religious issues as well as products like feminine hygiene probably do necessitate a moderator or interviewer from a similar demographic.”

Scott Alden, President, Alden & Associates Marketing Research, agreed that while there are situations where a shared background, gender or ethnicity may prove more effective in research settings, marketing is still marketing.

He related a situation in which he delivered a presentation on marketing at a Minority Small Business Association meeting. “I spoke about effective marketing,” Alden explained. “During the Q&A period, one attendee said, ‘You’ve done a good job of telling us about marketing, but not necessarily about marketing as a minority.’ My response was, ‘What would you expect a lily white boy like me to be able to tell you about being a minority?’ Marketing is marketing.”

However, Alden acknowledged that with respect to ethnicity, there are subjects where a “similar” moderator might prove more effective due to cultural differences. He explained, “Older, Hispanic women might be more open about some subjects with an older, Hispanic female moderator. And in some cases, an African-American moderator might be more effective with an all-African American group.”

He added, “I was raised by Ozzie & Harriet (although in this case, Ozzie had a job), so I would have no ability to be perceived as empathetic to a group of black, female, heads-of-households, raising children and grandchildren on their own (assuming the subject was related to that).”

On the other hand, Alden said he was effective as a moderator when conducting groups with women aged 35-50. “The client was looking to market a nutraceutical that caused the growth of good bacteria in the digestive system, long before Jamie Lee Curtis began hawking yogurt. These women engaged in a conversation about getting yeast infections from their husbands’ sperm. I’m glad I made them feel that comfortable, but you’d think with my being the only male in the room, they would have been a bit more reticent to discuss the subject.”

Similarly, while Alden used to conduct a number of groups for videogame developers at producers, at age 59, he recognizes that he is now perceived by clients as having “aged out” of being able to effectively get 13-year-olds to open up. “I’m fine with that,” he said. “They’re probably right. A younger moderator is likely to be more effective with this subject and this age group.”

Donna Taglione, Vice President, Field Operations, Morpace, Inc., stressed that a preference for moderators with the same background as research participants is not a myth and, indeed, has been a prevalent client view for a long time. “I have sat in the client’s chair and have been a moderator for 20 years,” she said. “There are topics that are better served matching the person asking the questions to the person answering the questions. For example, there may be a preference for a female moderator when discussing feminine hygiene products. That’s not a topic a male moderator is likely to get respondents to share details about no matter how skilled he might be as a moderator.”

Rodney Kayton, Managing Partner of Tampa-based Study Hall, a brand and communications research company, acknowledged that the “moderator match-up” approach is no myth and is, indeed, a phenomenon that seems to have become more prevalent lately.

“While everyone can agree that functional communication barriers such as Hispanic groups ‘in language’ would require a Spanish-speaking moderator, it’s an entirely different issue when clients impose a bias based on the moderator’s gender or skin color,” Kayton said. “I have experienced this bias personally as it pertains to conducting groups with the African American segment as well as topics that clients seem to feel are ‘best served by a female moderator’ such as cosmetics, clothing, and personal products. My general sense, and one that I communicate to clients, is that I won’t ‘make any assumptions’ while conducting these types of groups that otherwise might be made by a moderator ‘deeply familiar’ with the subject matter.”

Indeed, Kayton noted that in these scenarios he has proved to be highly successful in obtaining richer information simply by asking relevant questions that might otherwise have been excluded because the moderator made an assumption. “My classic example is conducting cosmetic groups...as a man, I acknowledge that asking what a woman might feel is a ‘stupid question’ but those questions always generate not only fun and community in the group dynamic but also a rich and usually unexpected discussion in great detail.”

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