

# Introduction to Ethnographic Research

## 101: The Basics

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# Overview of the Day

- Ethnography Definition
- Ethnography as a Tool
- Advantages and Disadvantages of Ethnography
- Steps in Conducting Ethnography
- Types of Ethnography
- Data Collection Methods
- Types of Analysis Methods
- Client Involvement vs. Outside Consultant Involvement
- Case Studies

# What is Ethnography?

## Anthropology:

- Study of cultures, relationships, humans and their environment
- Anthropologists live within an community for an extended period of time: interacting, studying, participating, researching
- Return to home community with research, write paper/book on the culture of community

# What is Ethnography?

Ethnography is:

- Branch of anthropology
- Comparative study of:
  - Contemporary cultures
  - Acculturation
  - Human ecology
- The application of anthropological techniques is ethnography. Ethnography literally means the writings or report of anthropology study.

# What is Ethnography?

Anthropology techniques applied to the business world:

- Businesses/organizations don't usually have the same amount of time or money anthropologists do
- Ideals from anthropology applied in abbreviated version to business

# What is Ethnography?

Ethnography is:

- The technique of:
  - Interacting with the consumer
  - Consumer's natural environment (home, office, retail, etc.)
  - To get a more realistic understanding of attitudes, behaviors, motivations and needs
  - Analysis of data collected
  - Also called: observational research, fieldwork, immersion, in-home, anthropological research

# Ethnography as a Means to:

- Discover actionable unarticulated needs
- Spurring insight, innovation, creativity and confidence across the team
- Building cross-functional alignment around the customer need
- Building hypothetical customer requirements
- Developing new products, brand extensions & improvements on current products
- Developing an understanding of the emotive function of a product feature
- Determining the “real” problems

# Ethnography vs. Other Qualitative Methods

Objective	Groups	1-1's	Ethno
Idea generation	Red	Grey	Grey
Concept development and screening	White	White	Grey
Evaluation of clarity or comprehensibility	Grey	Red	Grey
Opinion leader/lead user panels	Grey	Red	Red
General market education or immersion	Red	Red	Red
Hypothesis generation	Red	Red	Red
Research design	White	White	Grey
Questionnaire construction	Grey	Red	Grey
Clarification of responses from quantitative tests	White	White	White
Reconciliation of differences in findings between studies	White	White	White

Red= Key strength    White=Strength    Grey= Secondary



# Advantages of Ethnography

- Rich, in-depth information
- Natural environment gives a more realistic perspective
- Direct contact with consumer
- Great for building hypotheses
- “Falling in love” with your consumers
- Fun and exciting

# Disadvantages of Ethnography

- More intense logistically than focus group research
- Not quantitative work, but can lead up to quantitative research
- Requires more involvement from sponsoring company
- More expensive than focus group research

# Anthropological Approaches & Barriers

- Inductive
  - Barrier: discomfort of stepping away from rational, deductive and number-oriented approaches
- Naturalistic
  - Barrier: discomfort of going to “the customer’s turf,” taking a lot of time
  - Barrier: subjectivity of fieldwork
- Emphasis on Context
  - Barrier: discomfort in looking outside the direct context of use

# Steps in Conducting Ethnography

Step 1: Prepare for ethnographic research

Step 2: Conduct the ethnographic research

Step 3: Analysis of ethnographic research

Step 4: Determine outcomes and next steps

# Step 1: Prepare for Ethnographic Research

Elements of preparing:

- Determine research objectives
- Determine research design
  - Type of research method (s)
  - Type of customer
  - Recruiting method
  - Number and length of site visits
  - Team involvement and participation
  - Type of data collection methods

# Types of Ethnography

- Participant observation
  - In-home interview
- Field observation
  - Shadowing
- Behavior trace study
  - Dumpster diving
- Disguised field observation
  - Mystery shopping
  - Hidden cameras

# Types of Interviews

- Structured interview
  - Distinct set of questions
  - Must follow a guide
  - Similar to quantitative research
  - Used to understand relationships between objects (piling, sorting methods)
- Semi-structured interview
  - Areas and questions to ask
  - Going off the discussion guide is acceptable
- Unstructured interview
  - Areas to cover but no specific questions
  - Usually used for rapport building

# Data Collection Methods

- Field Journal
- Audio: tape recording
- Visual: digital camera, video recording
- Pre-visit homework
- Debriefing
- One-page profile sheet



# Data Collection Methods

- Field journal
  - A must for ethnography unless conducting disguised field observation
  - Important for archiving
- Photography/Video/Audio
  - Important for visual learners
  - Important to refer back to later
  - Important to have if client is not involved in the research
  - Important for archiving
  - More expensive
  - Time consuming to document

# Picture Log

## PICTURE LOG OBSERVATIONAL/ETHNOGRAPHIC RESEARCH

INTERVIEW TEAM: \_\_\_\_\_

Example:

What is the picture of? *Dora, the mother, Fido, the dog, and Elaine, the 8 yr. old daughter, showing us where the dog food is in the kitchen*

Where was the picture taken? *In Des Moines, Iowa in the kitchen*

Date and Time : *3/28/01, 4:00pm interview* Interview with: *Dora Hughes*

Picture 1:

What: \_\_\_\_\_

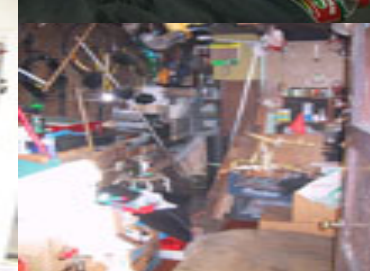
Where: \_\_\_\_\_

Date/Time: \_\_\_\_\_ Interview with: \_\_\_\_\_

# How Photography is Used



Clutter  
Disorganization  
Personalization  
Multifunction  
Security products  
Frustration  
Lack of time







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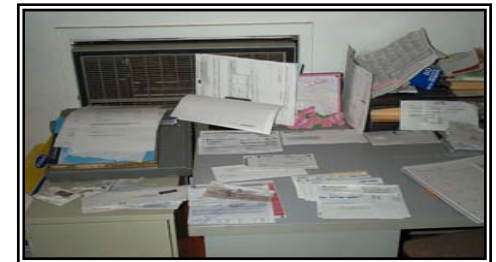
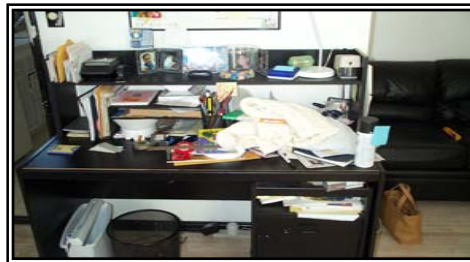
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Slide 20

# How Photography is Used



**Paying  
Bills**





# Homework Examples

## Collages Journals



"What in your life, motivates, influences and shapes your financial decisions?"

All of our financial decisions at this time are purely motivated by what best suits our children's needs.

Our children are the center of our life! Our everyday movements are dedicated to ensuring that their future is secure and that they ~~will~~ will not have the same hardships that we have had to overcome.

When we are able to provide for our children and we see the smiles on their faces, it brings joy to our hearts and we know that all of our hard work pays off. So to sum it all up our children are our motivation.

Written by  
Valerie and Erik Williams

## Picture Log Pictures



# Homework Examples

**Your Lipstick Log**

Directions: Thank you for agreeing to participate in our research around lipstick. Please use this log to track when you apply lipstick within a 48 hour period. This information will be very helpful to us in understanding your needs around lipstick products. You can start the first day you receive this log. Extra space is available on the reverse side of this sheet. Thanks again!

Your Name: Debbie  
Age (Optional): \_\_\_\_\_

Date of application	Time of application	Location where you applied your lipstick. (Where you were when you did it?)	What kind of lipstick did you apply? (Color, type, brand, etc.) Please describe briefly.	What was/were your reason(s) for applying lipstick?
Monday, June 10, 2002	7:30am	Bathroom at home	"Sassy", Matte, Prettygirl Co. It is a deep burgundy.	Big meeting at the office today and wanted to look professional.
Wed. 6/12	11:15 Am	Bathroom at home	L'Oréal Lip Liner "Basic Browns" Revlon Lipstick - Highbeam Tan	Going to work Starting my day
Wed. 6/12	1:00 pm	"	"	Returning to work from lunch
Wed. 6/12	7:30 pm	Bree's dining room	Mary Kay "Neutral"	Mary Kay Makeup Party
6/13	1:15 Am	Bathroom at home	L'Oréal Lip Liner "Basic Browns" Revlon Highbeam Tan	Going to work
6/13	5:25 pm	"	"	Going out to eat & getting hair cut
Fri. 6/14	1:15 Am	"	L'Oréal Lip Liner "Basic Browns" Clinique Sweet Honey	Going to work
Fri. 6/14	4:30 pm	"	"	Going to a picnic/party

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**PICTURE LOG** Mary Turner  
**OBSERVATIONAL/ETHNOGRAPHIC RESEARCH**

INTERVIEW TEAM: Para + Wendy


Picture # 1 Date/Time/City \_\_\_\_\_  
Details: family pictures

Picture # 2 Date/Time/City \_\_\_\_\_  
Details: family pictures

Picture # 3 Date/Time/City \_\_\_\_\_  
Details: picture @ makeup table

Picture # 4 Date/Time/City \_\_\_\_\_  
Details: makeup

Picture # \_\_\_\_\_ Date/Time/City \_\_\_\_\_  
Details: \_\_\_\_\_



November 9, 2004

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Photo showing lipstick application.

Side 23

# Debrief Form and Format

Observation	Insight	Application
Raw data or fact  Facts could be replicated or verified	Your twist on the observation  Past experience, knowledge, interpretation and biases come into play	Consumer need, business, market, product, service, communication or advertising idea



# Interview Profile Sheet

## Interview Profile Sheet

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Time: \_\_\_\_\_

Brief personal description

Picture

To be scanned in from  
Digital Cameras

Key Quote

Other Observations & Quotes

- 
- 


3-5 compelling needs

Segment Descriptor  
Demographic information  
Other attitudes, personality  
characteristics

# Interview Profile Sheet

Western Union – Ethnographic Research  
Interview Profiles

Denver, CO & Los Angeles, CA – April 16-17 & 23-24, 2001  
Page 17



**Valerie & Eric Williams**

*"Our motivation to buy is based on our children's needs."*

*"Our biggest challenge is, will we have money for our kids future?"*

*"I've got a lot of money management info, but I'm swimming in all of this stuff."*

**Date of Interview:** April 23, 2001  
**Time:** 6:00 p.m.

**Ethnicity:** African-American  
**Age:** 39/34  
**Gender:** Female/Male

**Marital Status:** Married  
**Children/Ages:** 4 Kids - 8 - 21  
**No. of People in Household:** 5

**Household Income:** \$0 - 29,999  
**Education Level:** Completed Associates or B.A.

**Needs Observations:**

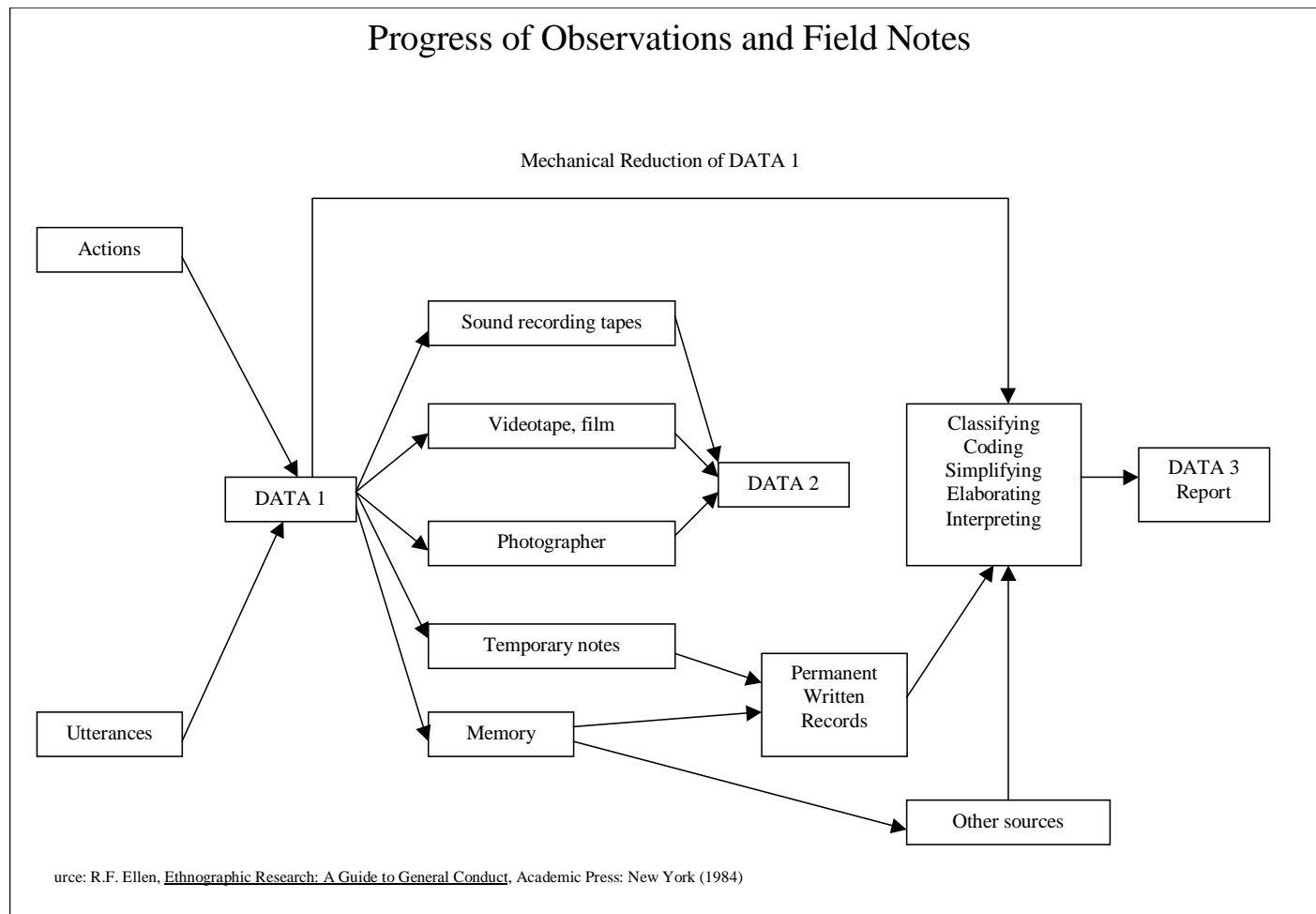
- Family is important
- Indulge the kids
- Overwhelmed with information on money management

Demographic Information

Key Needs and Observations

Key Quotes from Consumer

# Progression of Data Collection Methods



# Sponsor Involvement in Ethnography

## Types of participation

- Abstract participation
- Evolving participation
- Full participation

## Developing the team

- Cross-functional – balance demographics, job function and experience with consumers
- Stay together throughout the project

# Step 1: Prepare

## Advice from the Ethnographer

- Research is only as good as the research objectives
- Fewer people on the research team are better than more
- Address privacy and safety issues in a straightforward manner
- Don't expect respondents/sites to fit exactly into segmentation silos.
- Flexibility in recruiting times is important.
- Expect that for every hour in the field, ten hours of preparation, administration and follow-up work will need to be done.

## Step 2: Conduct Research

- Review of basic theories and techniques in ethnographic research
- How to sustain disciplined subjectivity through managing personal & corporate biases
- How to develop open-ended, story laden & non-leading questions & probes
- How to observe and listen
- How to take notes, use other methods of data collection, build a field record and debrief

## Step 2: Conduct Research Advice from the Ethnographer

- Set expectations with the team before going into the field
- Know how the data collection equipment works
- Stay flexible during research
- Do not jump to conclusions
- It is normal to feel overwhelmed by the amount of data collected

## Step 3: Analysis

Elements of analysis:

- Description
- Analysis
- Interpretation



# Description

- Quality description
- Stories and concrete specifics
- Vivid depictions of customer's world
- Answer questions:
  - What is going on here?
  - What is really going on here?
- Getting beneath surface level observations

# Analysis

- Qualitative cluster analysis
- Language processing
- Value pyramid

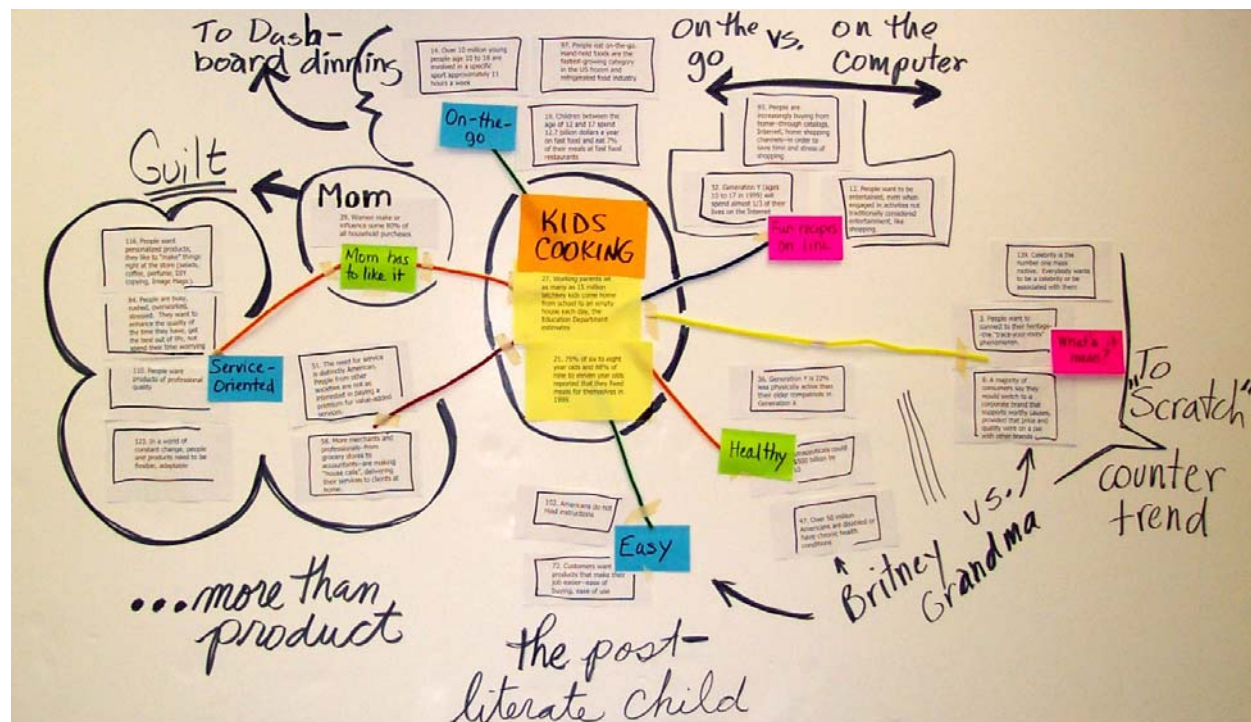
# Analysis

## Qualitative Cluster Analysis

- Pull particularly sticky pieces of information from data gathered in research
- Clusters form from data
- Clusters are given titles for key element tying cluster together

# Analysis

## Qualitative Cluster Analysis Example



# Analysis

## Language Processing

- Customer quotes are scrubbed for bias
- Grouped based on common thread or theme
- Grouping given titles
- Grouping titles grouped and given higher order title
- Map developed to show relationship between groupings
- Overarching problem/title given to entire map

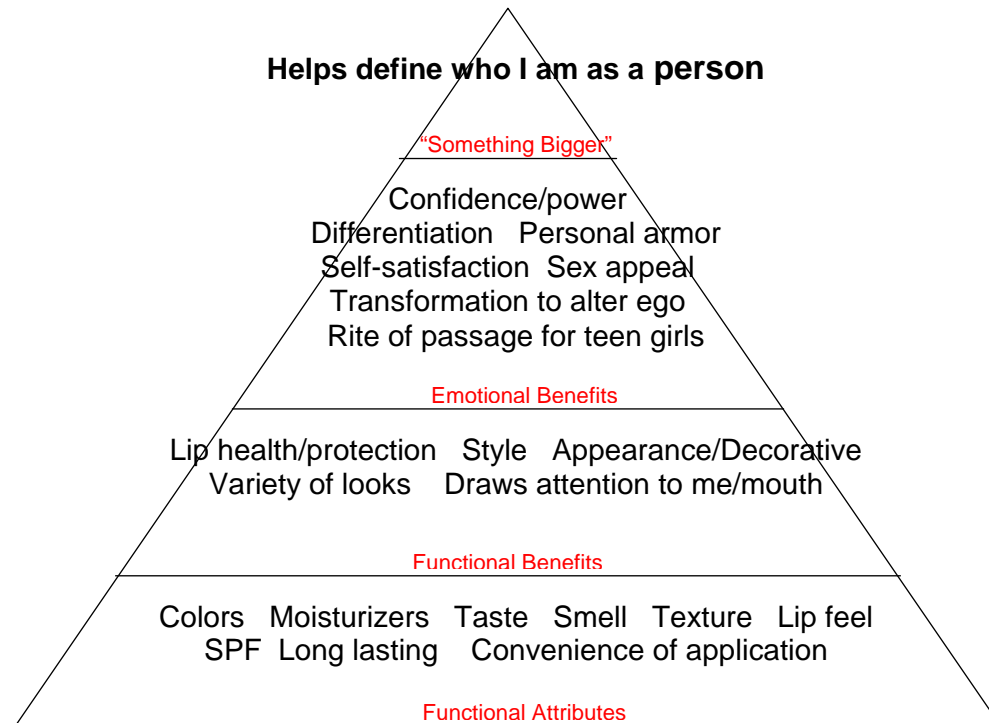
# Analysis

## Value Pyramid

- Data is mapped onto a hierarchical structure of customer benefits
- Elements of pyramid are:
  - Fundamental product attributes
  - Functional benefits
  - Emotional benefits
  - Higher order benefits

# Analysis

## Value Pyramid Example



Ward, 2002

# Interpretation

## Rules of Thumb:

- Critical team work process
- Answers the question "so what?"
- Team transcends the actual data to make creative leaps in relevant directions
- Involves intense dialogue, listening and grounding in tangible data
- Developed into robust themes



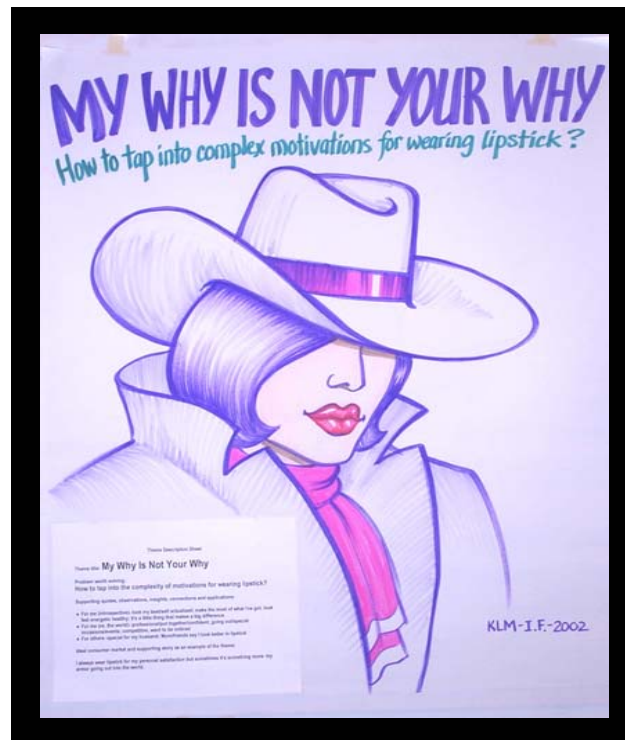
# Interpretation

Parts of a theme description:

- Theme title
- Problem worth solving, customer need
- Supporting observations, insights, quotes and facts from site visit
- Supporting customer story
- Diagram of the theme
- Pluses and concerns for company

# Interpretation

## Theme description example



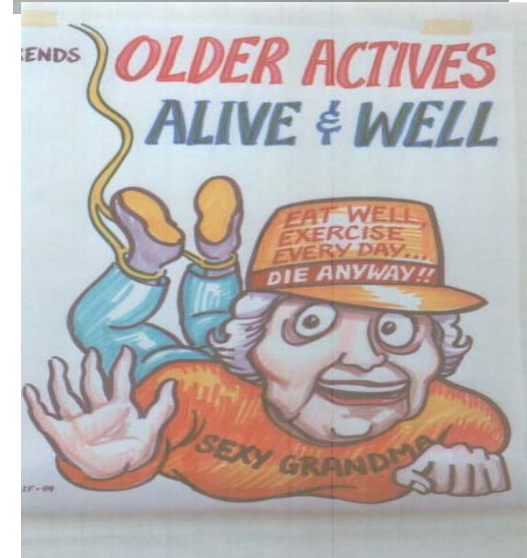
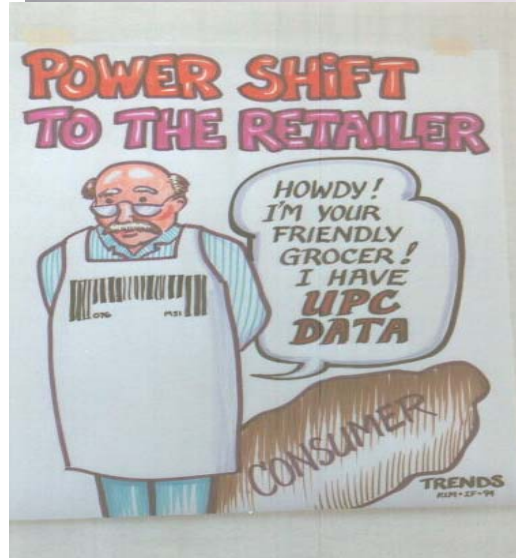
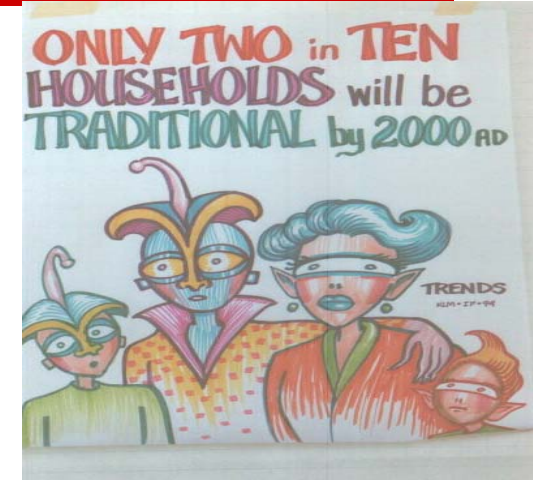
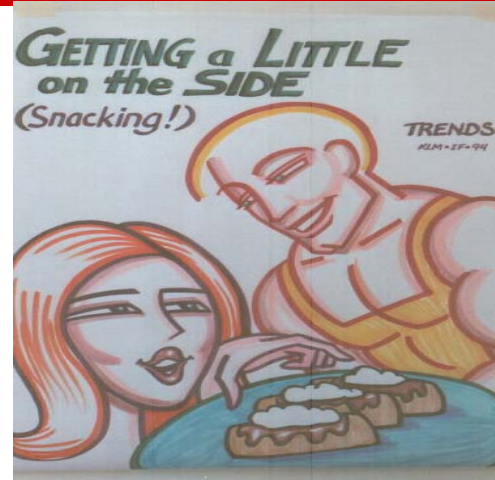
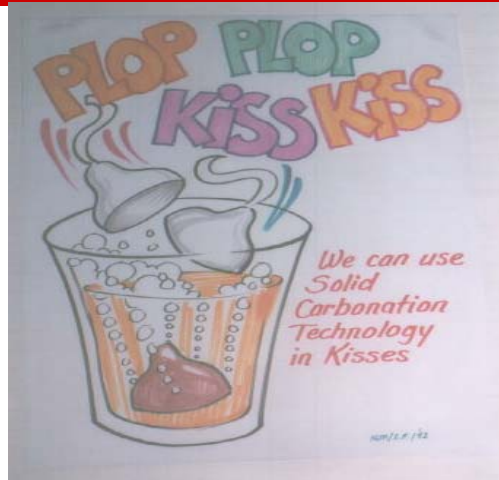
### My Why is Not Your Why

**Problem worth solving:** How to tap into the complex motivations for wearing lipstick?

Supporting insights:

- For me (introspective): Look my best/self-actualized; make the most of what I've got, it's the little things that make the difference.
- For me (vs. the world): Look professional, put together/confident; going out, special occasions/events, competitive, want to be noticed.
- For others: Special for husbands, mom/others say I look good in lipstick

# Interpretation



Trend posters from ethnography taken into ideation session to spark ideas

## Step 3: Analysis

### Advice from the ethnographer

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- Contextualize the research as one piece of a broader learning process
- Involve key stakeholders early
- Beware of the “commitment gap”

## Step 4: Determine Outcomes Next Steps

- Individual outcomes
- Team outcomes
- Organizational outcomes
- Action plan

# Individual Outcomes

- Individuals feel empowered
- Intuition about consumer is more finely tuned
- Chance to see the bigger picture
- Fieldwork team feels responsible to represent the customer

# Team Outcomes

- Energized by the process
- Alignment on discoveries and insights
- Team building
- Team feels ownership of the outcomes

# Organizational Outcomes

- New way of listening to its customers
- Learning about corporate biases
- Ability to see across divisions



# Next Steps

## How to Keep Up Visibility

### Potential Next Steps:

- Springboard story
- Innovation Cycle to develop:
  - New products
  - Communication strategies
  - Marketing strategies
- Highlight video or presentation
- Quote & collage board

# Case Study

**Company: Johnson Controls, a major manufacturer of car interiors**

**Background:**

- Develop themes directly from consumer insights that explores the relationship between families, vehicles, and the spaces around vehicles

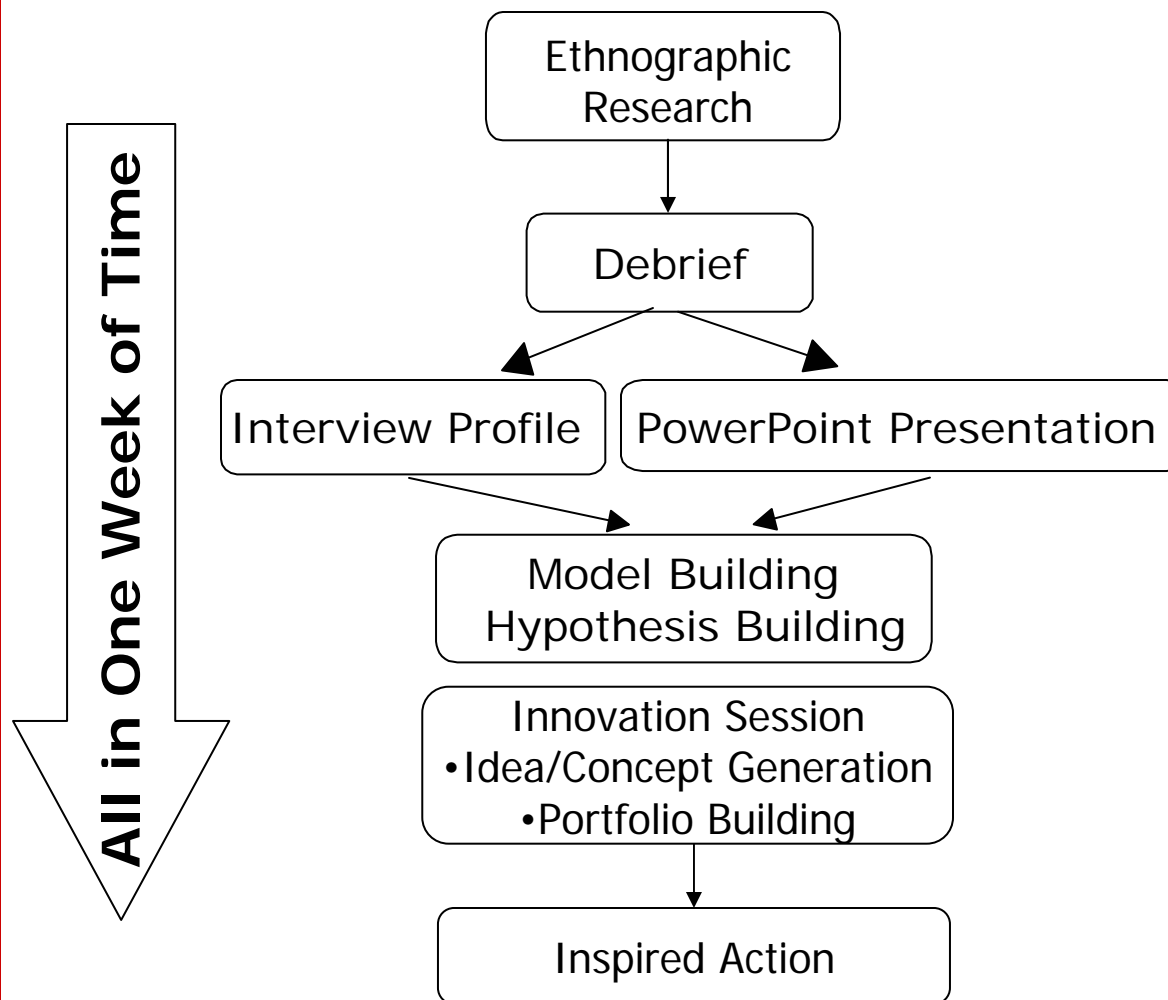
**Solution: The BLITZ process**

- One week of innovation (Five very full days)
  - Ethnography
  - Model Building
  - Innovation Session
  - Portfolio Building

**Outcome:**

- New product innovations for car interiors being tested now

# Process Diagram



# Conclusions from the Field



Clutter  
Disorganization  
Personalization  
Multifunction  
Security products  
Frustration  
Lack of time

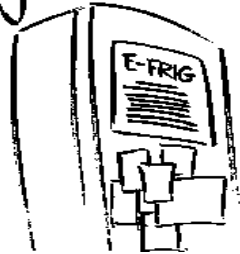


# Conclusions from the Field Time, Organize & Communicate

Sinc & Steer<sup>18</sup>



You've Got Mail<sup>101</sup>



Shared Schedules<sup>51</sup>

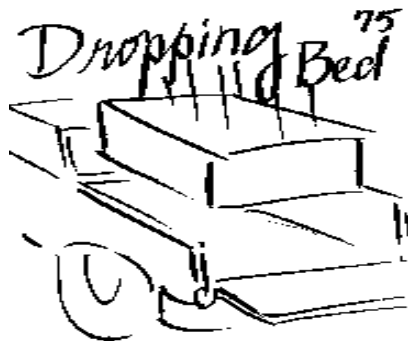


"Tell me what to do"

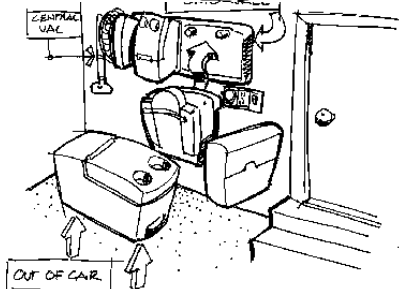
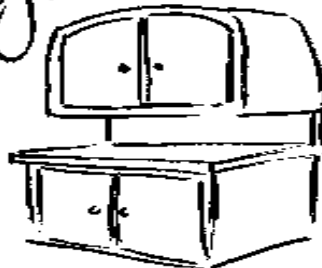
- New family **gathering points** of:
  - Car
  - In-home discussion
  - Staging areas and transition areas
- Identify the appropriate and specific **layers of communication** that can be delivered into the car and home.



# Conclusions from the Field Car to Home Transition



Y'ant To? <sup>128</sup>



"My things belong there..."

*Storage in the car and home that is:*

- "Place specific"
- "Activity specific"



# Case Study

## **Company:**

Western Union, a financial services company targeting the lower income person

## **Background:**

- Never done research with end-user before
- Looking for insights into current consumer to build off brand equity to a new product/service line

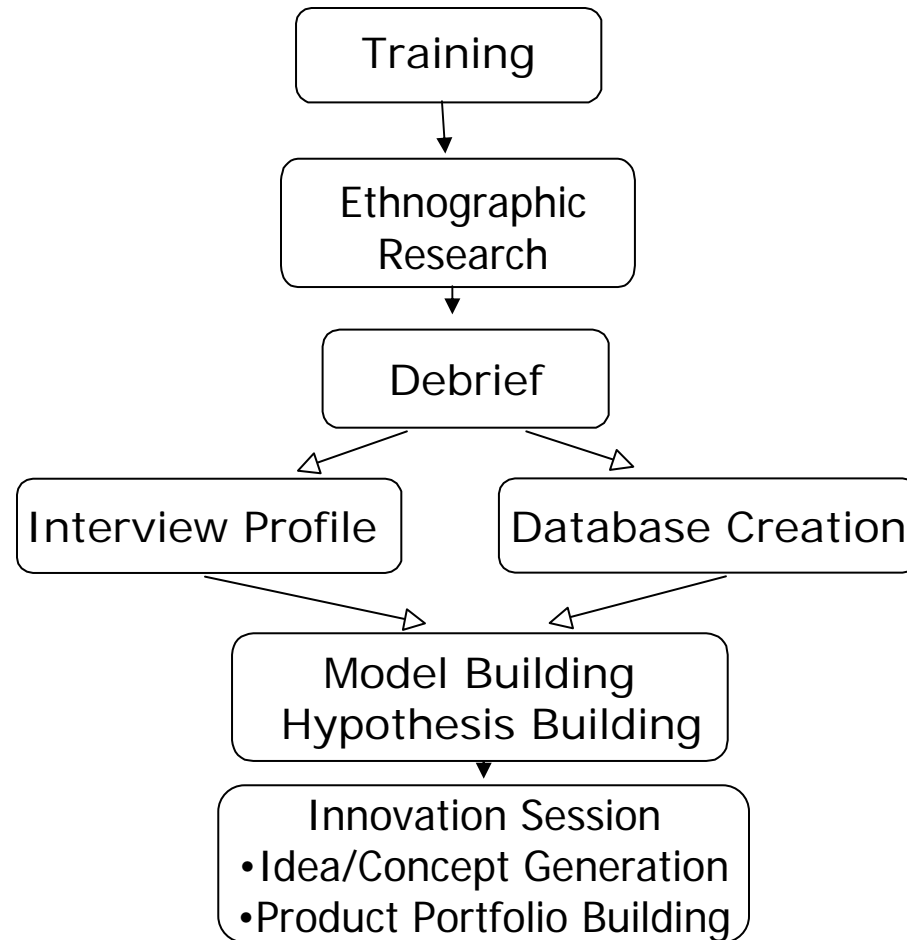
## **Solution:**

- In-home interviews in different regions of the country with lower income people and families
- Followed by a model building session and innovation session

## **Outcome:**

- Six new platform areas

# Process Diagram







# Single Mother

## Two people in household

### Income: \$0-29,999

**"The system works you,  
why not work it."  
"I love paying my bills."**



### Needs Observed:

- Religious
- At peace and happy
- Disciplined and persevering
- Overcame adversity
- Realized the importance of having a roof over her head

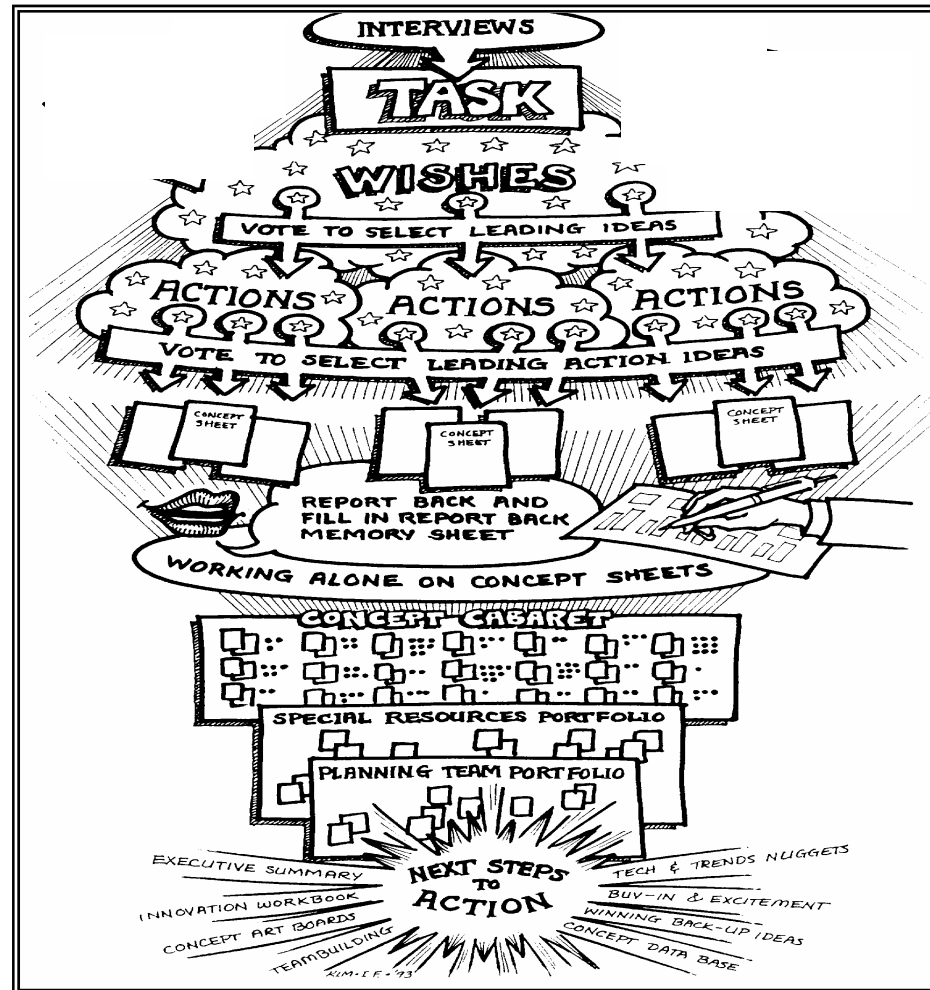
# Innovation Session Process Overview

## Two-Day Session

- 500+ ideas
- 125 beginning concepts
- 30 concepts on portfolio
- 10 platforms

## 25 participants

- 8 core team members
- 5 consumers
- 7 other WU employees
- 5 facilitators



# Case Study

**Company:** Major manufacturer of child care products

**Background:**

- Extremely competitive industry
- Over researched problem
- Looking for a fresh new way to look at an old problem

**Solution:** Ethnography research with people not like us

- In-home interviews with disabled care givers
- Video taping of research
- Highlight video produced for innovation session

**Outcome:** A series of product line improvements

# Thank You!

## Questions?