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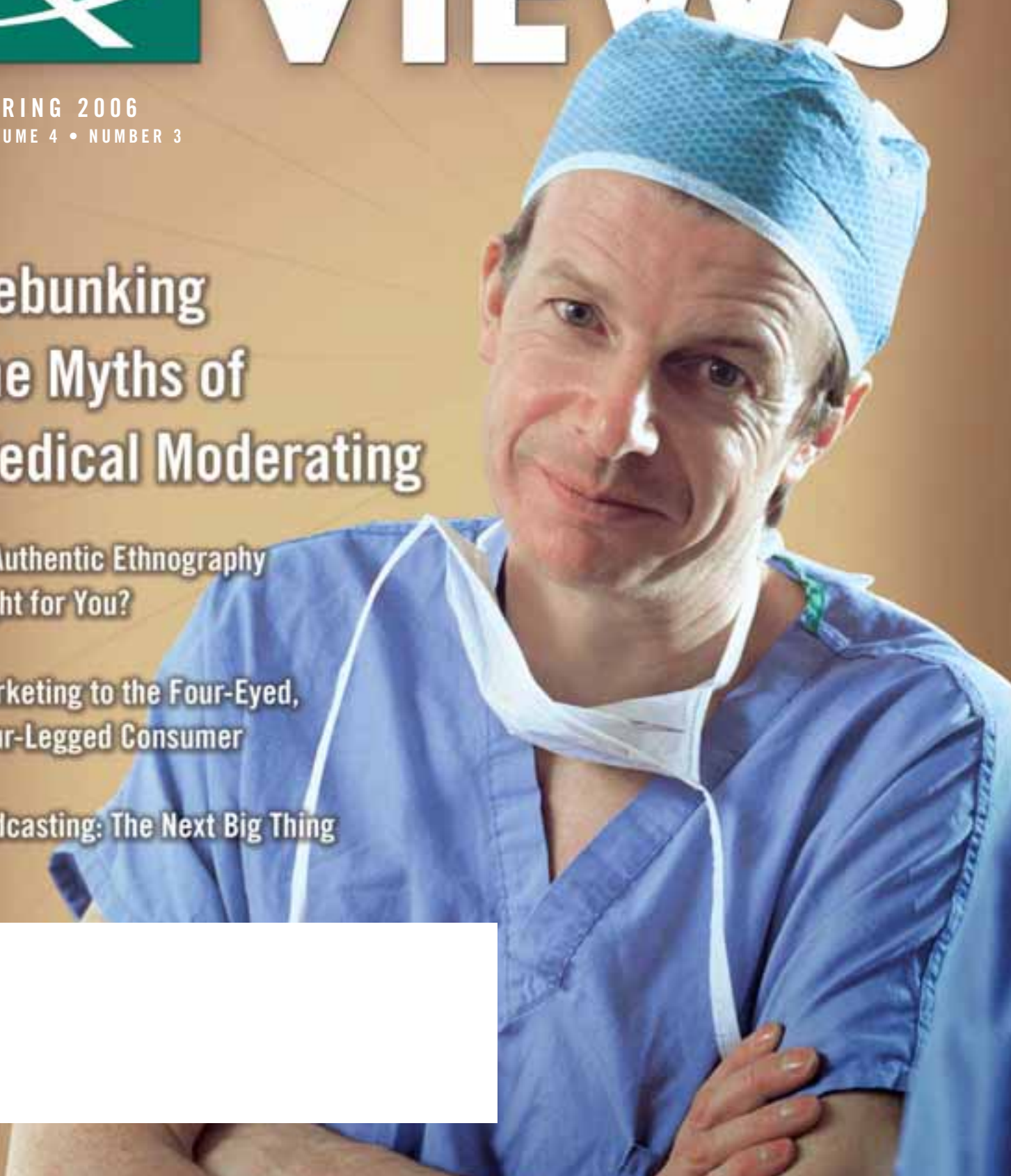
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Debunking the Myths of Medical Moderating

Is Authentic Ethnography
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Ethnography Revealed, Part 1

Is Authentic Ethnography Right for You? *Lessons from 15 Years of Consumer Ethnographic Experience*

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Authentic ethnography is a distinct methodology that relies on pure observation of natural behavior and that draws from the traditional roots of academic anthropology, yet seeks to marry the process with the contemporary, competitive needs and breakthrough possibilities of the best qualitative market research.

Stories of breakthrough and brand transformation connected with “ethnography” are surfacing from the research underground. Examples (edited for confidentiality) abound, even astound:

- In a vacuum-cleaner ethnography, machines fall down stairs and out of closets, consumers battle with vacuuming throw rugs, and hoses and handles damage walls as women vacuum in narrow hallways or small bedrooms, leading the manufacturer of this brand to develop a line emphasizing maneuverability over suction power.



- A company known for its mainstream cookie/cracker brands discovers through authentic ethnographic shopping observations that the speed and intensity with which consumers walk down particular supermarket aisles and select products provide the critical key to repositioning their category and guiding aisle redesign.
- In a beverage ethnography, respondents' strong community orientation is experienced viscerally by team members during usage of a well-known brand of powdered soft drink. After observing the surprising practice of spontaneously mixing together multiple flavors to make large quantities for family and friends, the company infused new life into mainstream advertising efforts and the product line, with an immediate increase in share of market.
- And the list goes on...

Understanding the Craving for Ethnography

Why does ethnography have this power to break the code in solving research issues and developing high-level marketing and creative insights that lead to brand transformation and the creation of viable strategies? Why do many clients and qualitative researchers who were once exclusive devotees of more traditional qualitative methods now seek out ethnography to explore behavioral dynamics, dive deeply into brands' emotional benefits and diagnose unfulfilled needs and problems that respondents are unable to voice in focus groups? Though few can agree totally on what ethnographies entail or how they should always be executed, it is clear that this potent in-situ methodology is being conducted at intense levels, as clients strive to see key respondents in their real-world environments, away from facilities.

So, What Is "Ethnography," Anyhow?

The fascination about ethnography is also a result of its elasticity, even lack of formal definition — there are as many types of "ethnographies" as the imagination to create them. Any of the following could conceivably be an ethnography, and a qualitative researcher might wonder which one is the "real deal":

- a few personal interviews conducted in selected respondent homes, after a series of focus groups, to elucidate and expand group impressions
- an intense exploration of the total personality and lifestyle of a loyal user base, using intense, longitudinal or repeat in-situ interviews

- a broad company-wide investigation, almost quantitatively survey-like in breadth, that involves multiple at-home/in-situ visits among multiple user types and seeks to observe all sub-brands and products within a company's portfolio or known category
- brief introductory in-situ interviews followed by videotape cameras placed in a small number of selected consumer household areas (kitchens, cars, bathrooms, etc.), after which hundreds of hours of videotape footage are analyzed for provocative insights about consumers' behaviors that occurred without intervention from an obvious research team
- months of videotaping a small sample of entire families at all hours of day and night, with results similar to reality TV shows
- "consumer at home" interviews of less than 90 minutes to add depth, originality and visual interest to a creative presentation
- a focused, ergonomic-like observation of a single behavior, product or activity that allows a design or creative team to glimpse real behavior and inspire new ideas and solutions
- newer, fun, experimental techniques with an ethnographic flavor that involve creative staging of in-situ situations. These include setting up "friendship" or "peer" groups in respondent homes, interviewing teens or adults at beaches, bars and fast-food restaurants and/or asking consumers to create their own videotapes and photo diaries, edited to enhance in-home interviews.

In the face of client craving, plus endless iterations of ethnographies, most moderators end up creating their own versions. They add a dose of common sense and creativity to focus group and in-person depth interviews (IDI) experience, assuming that ethnographies are just a more interesting, perhaps deeper, longer version of in-depth interviews inside homes and shopping environments. We encourage this experimentation. Trying different techniques will help you feel more confident away from the familiar format of in-facility research and develop your ESP — ethno-graphic sensory perception — as you head into the wild terrain of real-life consumer observation.

When "Ethnography" Falls Short, Consider Going Back to the Basics

Yet, if "anything goes" in ethnography, why do some ethnographies seem to be more effort than

they are worth? After a few informal ethnographies, some researchers complain that it's hard to know what to look for. They wait endlessly for a specified behavior to occur; they tire of running from one in-home interview to another without having enough time to get below the surface; or they find observations hard to analyze. They discover that ethnographic findings can be out of sync with focus group and quantitative findings, even when the in-home interviews seemed rich and a client appeared initially satisfied. Even experienced insight managers confess they don't know when to prescribe ethnography or end up feeling insecure about observational data, wondering after a few attempts whether ethnography actually lives up to its exciting reputation.

I can identify with the polarities connected with ethnography: the confidence in its viability, along with doubts and questions. After years of conducting traditional qualitative research for major brands and agencies, and experimenting with early, focused forms of in-home interviews and ergonomic observational research, I realized there was more to be gleaned from the ethnographic technique. After completing academic study on the topic and after more than ten years of practice, I eventually fine-tuned a process that I call "authentic ethnography."

Authentic ethnography is open-ended, direct, pure, spontaneous observation. The goals of authentic ethnography are:

- to understand a major category, brand or consumer demographic in transition
- to solve a difficult, significant creative or marketing problem
- to guide new product and research development by coalescing a team's strategic direction through transformative ethnographic findings

Revealed ... the Seven Principles of Authentic Ethnography

Authentic ethnography is defined as a distinct process guided by seven principles:

1. Each ethnographic study involves between 12 and 20 individual ethnographies, each at least 4 hours in length, for a minimum of 50 to 80 hours of overall observation.
2. All ethnographic observations are conducted only during the time that the natural behavior is or might be actually happening.
3. A core client team is trained in authentic ethnography and then accompanies the lead ethnographer inside every ethnography.
4. The entire process emphasizes quiet, spontaneous observation using "soft eyes" as the crown jewel of the inner technique.
5. Staging of respondent behavior is eliminated or minimized.
6. A pre-screening qualitative mechanism (initial phase of focus groups, mini-groups, IDIs or phone interviews) is used to choose the optimal set of ethnographic respondents.
7. Ideation and debriefing processes occur with the client after each ethnography and at the end of total fieldwork, to make sense of and assimilate the complex, rich and intricate household observations.

Developing Ethnography as a Distinct Methodology

Authentic ethnography should not be thought of as an extension of focus group or IDI methodology, but as a distinct methodology relying on pure observation of natural behavior, not intervention nor staged experiences. The most challenging but real form of ethnography is the observation of naturally occurring behavior at the time it is happening and within the true-life experience of a respondent's and family's natural life.

We attempt to observe the sought-after behavior, inquiry, attitude or category only during the time, in the place and with whom it is naturally occurring. We try not to use traditional interviewing probes, external stimuli or unnatural influences. The observer tries never to interfere with the activity in question, but quietly, non-judgmentally and spontaneously focuses on observing all behavior that happens in a naturally occurring setting within a naturally occurring timeframe. If or when it may be necessary to prompt a behavior or awareness in order to observe the specific area of inquiry during the timeframe of an ethnographic observation, this is done with careful, dynamic understanding of the potential ramifications of interfering with actual behavior.

In essence, whenever an observation is conducted, the Heisenberg principle comes into play: observing any phenomenon invariably changes it. The more we ask questions, prompt behavior or stage a situation, the more strongly the respondent's real behavior or personal truth will shift. Authentic ethnography minimizes these behavioral changes as much as possible.

Observe and Note Everything

During each ethnography, we not only watch for the critical product or behavior, but we also just as carefully observe other products and lifestyle

areas that appear. Understanding the metaphors, analogies, icons and symbols found throughout the household and watching family dynamics under other circumstances gives us greater breadth for our specific product. Over time, we solve problems about our brand, naturally and with increasing flashes of revelatory inspiration.

Hence, our ethnographic agendas are usually of a checklist format. The checklist emphasizes and encourages the team to note:

- ✓ household furnishings, inside and out
- ✓ pantry, refrigerator and food-storage areas
- ✓ closets, attic, basement and garage
- ✓ photographs, heirlooms, collectibles and art
- ✓ “sacred” areas like fireplace mantels, fronts of refrigerators and tops of women’s dressers
- ✓ books, videos, magazines or lack thereof
- ✓ creation of shopping lists
- ✓ kids playing in their rooms
- ✓ opening of mail
- ✓ reading of newspapers
- ✓ playing of CDs or favorite music
- ✓ watching of TV
- ✓ dropping off or picking up children
- ✓ chatting with neighbors and relatives

- ✓ phone conversations
- ✓ pet dynamics
- ✓ symbols of religion, politics, accomplishments and education
- ✓ time spent in school, office or gym
- ✓ meals and eating experiences
- ✓ use of computers, email and internet
- ✓ spontaneous or planned shopping trips
- ✓ and more...

Two types of ethnographic observations are emphasized:

- One occurs mostly in and around the home or home-based environment as the starting and ending point, i.e., the Ethnographic Household Observation.
- A second type emphasizes shopping in outside retail outlets, i.e., the Ethnographic Shopping Experience. Shopping ethnographies always begin in the home, although the majority of time is spent observing respondents shopping. When asked to observe respondents in other environments like workplaces, schools or



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restaurants, we tailor our process to whether and how long we can obtain permission to observe.

Identifying Easier and More Difficult Ethnographies

Some respondent lifestyles and product categories are easier to observe using pure, spontaneous, authentic observation, while other activities and segments are more difficult. The degree of observational ease or difficulty should be carefully assessed at the planning stages of an authentic ethnography. A major part of the client team's early preparation and "homework" is to review previous qualitative and quantitative data to estimate time, frequency of occurrence and region of greater and lesser development, as well as correct segments for the inquiry, product or category at hand.

Easier ethnographies

As a rule, easier ethnographies include behaviors of some length that naturally occur at specific times of day. The ethnography can be scheduled to rely on key behavior happening as expected, such as: eating occasions like breakfast, lunch and dinner; personal-care routines like teeth-brushing, dressing and applying cosmetics; or

daytime and evening TV watching. Also falling into the easier-to-observe category are naturally busy respondents whose lives include a degree of interactivity. Work colleagues, groups of friends, mothers with babies or whole families with three or more members quickly lose interest in our laid-back ethnographic team and resume their natural activities quickly, without self-consciousness.

More difficult ethnographies

On the other hand, certain behaviors or activities are almost impossible to catch naturally without the element of luck or even light prompting. These less frequent behaviors occur almost unnoticeably at unscheduled times and, therefore, require the ethnographic team to be present during a span of time that may include the right moment or rely on synchronicity. More-difficult-to-observe categories include indulgent adult snacking, spontaneous food preparation or decision-making for major appliances that span a long period of time and involve multiple people.

More-difficult-to-observe segments also include individual respondents who will probably feel self-conscious and awkward being shadowed and observed by even a sensitive ethnographic team. Others are attention starved and too involved with

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the observers. These ultra-sensitive individuals could include teenage boys and girls at home, single empty nesters delighted at the chance for company and drop-in mothers-in-law or suspicious husbands entering while an observation is ongoing.

Yet, no matter how sensitive, challenging or painstaking it is to observe a respondent's behavior, environment or

A major part of the client team's early preparation and "homework" is to review previous qualitative and quantitative data.

product category, the goal of authentic ethnography remains focused: to observe everything naturally going on in the respondent's personal experience during the time set up for observation, watching for spontaneous occurrence of the key behavior, topic or attitude that is core to the research investigation as it naturally and spontaneously occurs.

Is Authentic Ethnography Right for You and Your Clients?

If natural observation appears impossible, this should be thoroughly explored upfront with the client team at the time of the first proposal. The project's original objectives may need to shift in order to create a natural observational process. Remember, authentic ethnography is best suited for affecting breakthroughs in high-level concepts, creative

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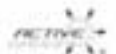


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positionings, brand transformation and new strategies. It would not be as appropriate for focused tactical decisions like testing a single new product, new packaging or copy for a print or TV ad. In such cases, other forms of creative observation — such as in-home interviews, peer groups or a mixture of projective focus groups and homework done by consumers (collages or photo diaries) — would be more appropriate and effective.

A Few Final Thoughts...

Companies and research managers who gain the most value from the painstaking process of authentic ethnography tend to be innovative and experienced in both qualitative and quantitative research, and who have a critical question or issue for which other forms of qualitative research seem inadequate or fail to yield true data. Be sure that you have the right type of client for this methodology.

The client team must also allow some lead time to plan, develop teams, enact and digest the ethnographic learning; otherwise, ethnography can fall through the cracks. Assume upfront attention to details that exceeds the usual qualitative process. Expect more extensive planning, training and presentation of the details of ethnography to the core client team before the study begins, at least two or more weeks of twelve-hour fieldwork and travel efforts, and multiple debriefs during the study. The ethnographer and client team will be joined at the hip, acting as a trained SWAT team, for at least six weeks of constant effort. Be sure that you have the right team for the process.

Watch for Part II

In the second article of this series, which will run in the Summer 2006 issue of QRCA VIEWS, the author will reveal the step-by-step secrets of conducting authentic ethnography. 



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