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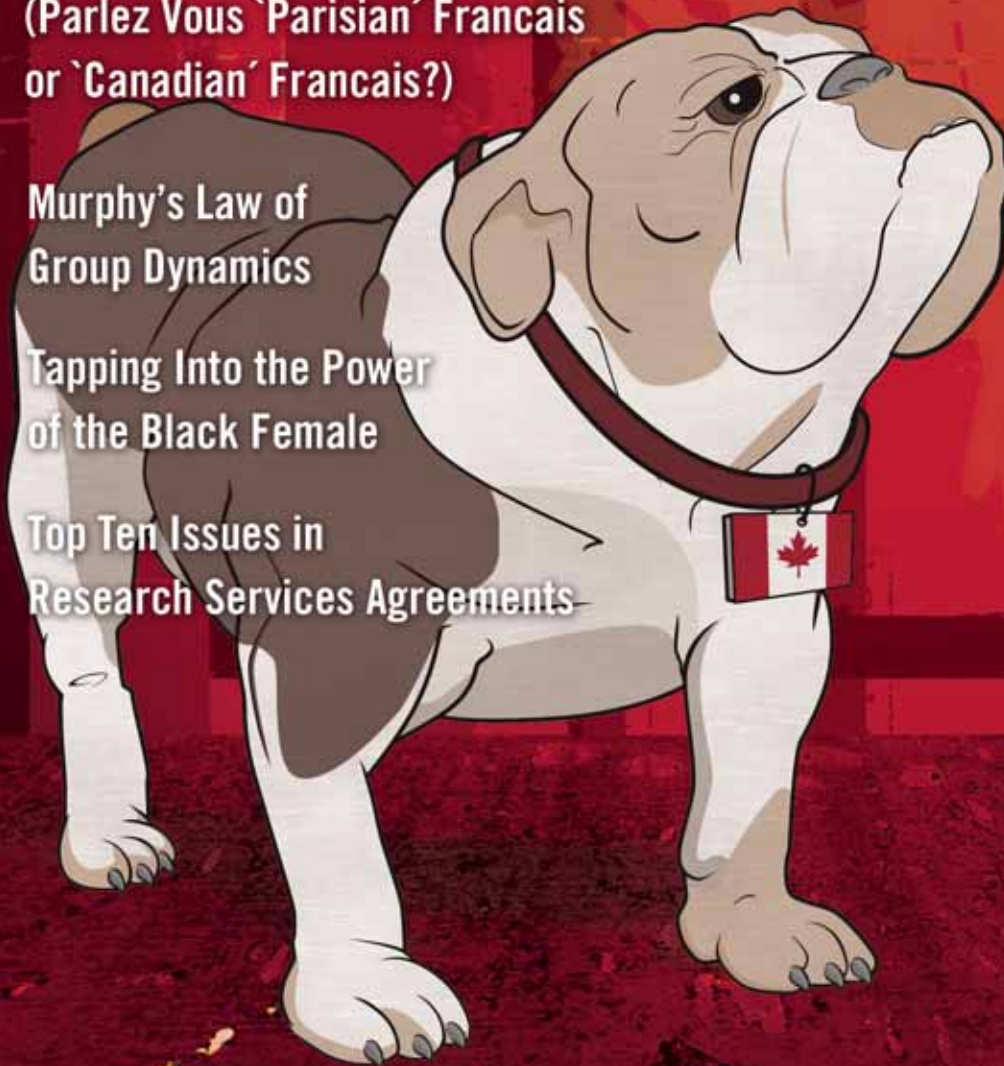
The Subtleties of Moderating in a Second Language

(Parlez Vous 'Parisian' Francais
or 'Canadian' Francais?)

Murphy's Law of
Group Dynamics

Tapping Into the Power
of the Black Female

Top Ten Issues in
Research Services Agreements



Ethnography Revealed, Part 2 ...

The Nuts and Bolts of an Authentic Ethnography Project

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Initially, most researchers, and especially new clients, present us with this challenge: Why not just do rich in-depth interviews inside the home and get in a little observing of natural behavior on the side? Won't results be similar to this total emphasis on pure, spontaneous observation?

The answer is no. After much experience with both techniques, we find natural, pure observation far superior to traditional probing or interviews inside the home when attempting to reach a breakthrough experience.

The value of our more difficult, esoteric, authentic ethnography is supported by scientific research on brain function. Physiologically, the part of the brain that does the behavior (pure, direct, spontaneous observation) is entirely different from the part of the brain that controls perception, that *remembers and describes* the behavior as a response to questions from a moderator or interviewer in focus groups or IDIs. If the ethnographer interviews the respondent at home using traditional probing techniques, the part of the brain that controls perception is activated, so the respondent begins to describe what is done rather than actually doing it, and ethnographic truth is unlikely to happen. Instead, a reconstructed invention of reality replaces actual behavior, even during the so-called "observation."

Essentially, conducting ethnographies as if they're a richer, more intimate form of in-depth interview limits the potential of authentic ethnography. Given the increased difficulty and expenditure of energies going from home to home vs. a central facility, experienced practitioners may end up pronouncing such in-home "ethnographies" a less viable use of time, effort and client money. Similar results might be attained inside facilities with creative focus groups that emphasize interesting projective, emotional or archetypal stimuli.





Observe More and Interview Less

As much as possible, the ethnographic rule of thumb is: more, more, more observation and less, less, less interviewing. Pure observation sounds deceptively simple. Actually, it is the most difficult part of the process, rarely attempted except by an experienced ethnographer or a trained client team, because it runs against everyone's grain to hold back and not ask questions about what is being seen... especially when the actual behavior is right there in front of the team, who have been waiting to see and experience it for hours.

Plan on an Ultra-Fuzzy Beginning to Most Ethnographies

Even when the lead ethnographer is experienced in pure observation, the client research team may feel as if it is operating within ambiguity, strangeness and confusion without the comfortable support of asking the respondent questions about what is happening and why. This is why we emphasize training of the core team to suspend judgment, relax and get into the lives of consumers for a few days until internal observational consistencies are illuminated. We plan always on experiencing an ultra-fuzzy beginning – that place of confusion and transition between knowing nothing and formulating firm hypotheses. We train and then re-train the supporting client team to approach each respondent in the way of “Zen beginner mind.”

Training the Core Client Team as Mini-Anthropologists

During a special half-day session of client training in authentic ethnography, we emphasize several points that help create this open-ended acceptance of each respondent's lifestyle and ultimately lead to breakthrough.

- Each team has three members, with distinct roles: a lead ethnographer and two clients. The lead ethnographer shadows the respondent and choreographs the entire process. One client fulfills the role of “visual observer,” noting *everything seen* using a checklist format. The second client is the “auditory observer,” writing down everything the observed respondent *says out loud* and verbal interactions between family members and team. Essentially, three pairs of ears and three high-functioning minds tap into each ethnography's insights.
- The team “dresses down” to avoid intimidating the consumer. Unless we're in a category or region that traditionally dresses up (a few corporate settings, more religious



homes, etc.), the team does observationals in clothes they'd choose for a casual Saturday at home.

- Use of “soft eyes” is critical for pure observation. The soft-eyes process does not focus directly, actively or aggressively on the respondent and never stares. Instead, the eyes are kept somewhat downcast at all times, in a relaxed way. The team is asked to gently drop the gaze if the respondent looks at us for approval or attention. The attitude of soft eyes keeps our consumers from feeling as if they're bugs under a microscope being observed by white-coated, uncaring scientists.
- Although it may feel unnatural, given conventional rules of social behavior, the ethnographic team avoids engaging in back-and-forth conversation with participants, even when each and every respondent will try hard – at least in the beginning – to engage us in chatting. They are as curious about us as we are about them. However, the lead ethnographer will reassure the respondents that our purpose is to simply observe natural life in their environment, not to chat or answer questions.
- The lead ethnographer will invite the observed respondents to feel free to explain out loud in as much detail as they wish what they are doing as they are doing it, without feeling as if they need any reaction from the ethnographic team. Verbalized respondent reflections help

the observing team better understand behaviors and motivations without prompting artificial or socially acceptable behavior.

- To not intimidate the respondents by unconscious controlling or aggressive body positions, the ethnographic team members are trained to position themselves — at all times — at a level that is somewhat lower than the respondents. The team sits while respondents stand or sit. Especially when there are children, mothers, teens or sensitive respondents talking, eating or doing any form of behavior, observers find a place to position themselves outside of the main locus of activity. They may even sit, kneel and relax close to the floor when observing, to avoid overpowering the participant.

Respondents Should Be Unaware of What the Team is There to Observe

Usually, all observations are conducted “blind”; the consumer is not overtly conscious of the brand or product category being researched. When the team appears for the ethnography, the respondent is simply told that “we are here to observe how people live in America... life, shopping, work, food, children, beverages, cleaning, cell phones, your family, friends and what happens, everything and anything. Do anything you would normally do during this period of time.”

The team then observes — *within the framework of all other products purchased and consumed in the household* — where the consumer keeps the brand-in-question, specific category or product on the shelf, how much is used or

Authentic ethnography is very different from traditional qualitative focus group or IDI techniques in that it involves pure observation of natural behavior with minimal intervention from outsiders, including the facilitator.

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thrown away, natural response to it and what other products are used in conjunction with the product being researched, as well as the dynamics of product usage within the four-hour ethnography.

The Four Hours of an Ethnography

There are no “typical” ethnographies, but the general flow may go something like this...

Hour #1

In the first hour, we come into the household, get our materials out, allow everyone to become comfortable with the process and explain several times that the process is spontaneous observation, not an interview. The client team is introduced as colleagues, assistants and trainees in the observational method — even if they’re high-level marketing, research or creative executives — explaining their roles casually. Then the lead ethnographer repositions them so they’re not all staring directly at the respondent. We thank and then hand the respondent the honorarium before the ethnography begins. This enhances permission to do anything they normally would, not fear unconsciously that certain behavior will result in nonpayment. Taking out our tape recorders, pads, pens and digital camera, we begin to observe. We wait as events and behavior start naturally. We move with the respondent, gently reconfirming our silent observational role if they try to chat.

In the first hour or so, we literally “hang with” the respondents, silently observing the family’s activities. In the beginning hours, we simply observe, letting life unfold as it happens naturally in the family. Within 30

minutes or the first hour, respondents begin to be more natural. Since our team seems rather boring, family members start interacting with each other — they “do their thing,” without watching us self-consciously.

Hours #2 and #3

Continuing into the second and third hours, we continue to shadow the respondent and family, intuiting when or how long to observe silently vs. softly asking questions (like “What just went on?” or “What is happening now?”) to allow new insight but not change behavior. We then return to silent shadowing and pure observational mode so respondents don’t begin a running dialogue with us. This in-and-out process happens many times over the course of the four hours. It’s the hardest part of the ethnographic process, but it’s the key to identifying breakthrough insight.

Hour #4

In the last hour or two, and when both client team and respondent have become sufficiently relaxed, we may spontaneously participate alongside the respondent in whatever activity happens to be occurring at home, retail environment, workplace or other location. The client team may ask a burning question or two, which brings them into the process without causing the respondent to begin lecturing the team about her life.

Concentrating on Shopping

When an ethnographic study emphasizes in-store-shopping behavior, the greater number of hours spent in total observation will be in the stores themselves. Each respondent has been recruited to need to go shopping for groceries, clothes or other items. The respondent’s shopping trip is a real one; he or she had already planned to shop on this particular day and time, with a real need or desire to look for the items to be purchased. We refrain from staged situations, like giving money to the respondents to watch how they purchase a particular product or brand.

We also assume there will be important links between the inside home environment, need levels, planning and at-home family dynamics just before the purchase experience. In authentic ethnography, we never just show up at the store; instead, we always meet at the home first and then go out. During our half-hour or so in the home, we check pantries and refrigerator, noting what is there and not there, packaging sizes, brands, multiples or singles of an item and leftovers. We also watch list preparation; notice

flyers, coupons and note items on counters; and move around with the respondent as she makes her last-minute preparations. If it's a clothes or other shopping trip, we ask the respondent to show us his or her closets, drawers and other pertinent locations of items, checking to see what brands, styles, colors and sizes are there, before new items are purchased.

We then ride in the respondent's car to the store(s) of her choice, letting her talk about what's on her mind as we drive.

At the store, the team must be even more prepared to wait and watch silently as the respondent goes about the retail or supermarket experience. Prompting or showing interest in a particular product, aisle, brand or item — though tempting — may actually motivate a “false purchase” or clue the respondent into what the team's goals are.

At the end of the shopping ethnography, we ride home with the respondent, help her unpack or unload, note family dynamics related to reception of the products purchased and ask any final questions from the team.

Optimal Methodological Elements of Authentic Ethnography

Against the backdrop of our pure, observational process, authentic ethnography suggests an optimal study scope to create the possibility of breakthrough findings. After years of experimentation with greater and lesser methodological elements, what seems to work best is outlined below.

Number of ethnographies

Although some anthropologists have suggested at least 20 households as a minimal scope, our rule of thumb for the optimal number of ethnographies runs between 14 and 18 individual households of four-plus hours each. This number can be completed in about two weeks (or a bit longer), gives the core team a chance to go to at least

two regions and observe two or three each of the key segments within a variety of life stages, incomes, ages and ethnicities. Fourteen to 18 ethnographies constitutes about 60 and 75 hours of total observation.

Length of each ethnography

Time inside each household or shopping ethnography runs between four-plus hours and a half-day. We have experimented with shorter time periods but find them lacking; a minimum



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Ethnography Revealed, Part 2 ... CONTINUED

of four hours appears essential to go deeply into the behaviors and attitudes of respondent and family. Even though they may seem social or relaxed on the surface, respondents do not let down their guard or show their real personas until enough time passes for them to become familiar with the ethnographic team, allow trust to form and move into natural behavior at their own pace. Longer ethnographies would not allow us to complete the 14-18 ethnographies suggested as our ideal scope within a reasonable length of client-oriented time, unless we mobilize multiple teams or remain in the field for months.

Optimal daily scheduling

We usually conduct two ethnographies per day, with hour-long team debriefs, a team meal break and allowance for travel to the next ethnographic observational. Each day is intense. Because we schedule each ethnography only when the behavior or issue under study is intended to occur, scheduling is based not upon the convenience of the client research team, but upon our consumers' lives.

Choosing the right respondents

We recruit respondents for ethnography using top-rated fields and detailed screeners with blind questions to be sure that the respondent is the correct one. We avoid observing the wrong respondent by pre-screening with short personal interviews, regular or mini-groups or even triads in facilities, to identify personalities and behaviors of potential candidates. We then invite willing respondents to participate at a later time.

If it is essential that the respondent not know anything about the subject we are seeking to observe, we will double-recruit ethnographic candidates. We then interview each of them (blind, by phone) and let the lead ethnographer make the final choice for in-home observation.

Collecting visual data: videotaping or photography?

Depending upon the scope and needs of the project, we make careful upfront decisions about forms of visual data collection. Whether to do photography or videotaping — or no visual data collection at all — will eventuate in implications at every level. Generally,

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we favor photography if the ethnographies are conducted inside the homes. When we conduct Ethnographic Shopping Experiences inside stores, we may do no visual recording except at check-out, since photography or videotaping may not be permissible, tends to irritate or alert store managers to our presence or radically change a respondent's shopping choices.

Photography is our preferred technique of data collection, along with client notes and some tape recording. If done unobtrusively, photography produces minimal change of behavior by respondents. Carefully labeled photo images are easy to sort and select for the final presentation.

However, visual data collection is ultimately a professional decision to make between you and your client. You may decide to do videotaping, if (a) you're an experienced videographer yourself or (b) have someone on your staff who's an expert in ethnographic videography, and (c) have the additional hours to go through tapes to create a dynamic film with a final report to the client.

A Few Final Thoughts

Though authentic ethnography involves more expense than the usual series of in-facility focus groups and IDIs, the process can pay for itself many times over, as it increases the likelihood of a successful product introduction, total brand transformation or groundbreaking new creative strategies. Even if it's not possible to do the total process of authentic ethnography, consider trying out one or more elements. Add an hour or two of pure observation to your in-home technique; consider lengthening your time with a respondent; train and add debriefs to your client team interactions; or experiment with new forms of visual data-collecting. Eventually, you may resonate even more with this classic form of ethnography. 📷



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