

BEYOND THE GLASS: MARKET RESEARCH IN THE WILD

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"You can call it ethnographic research. I call it the best way yet to create value. If you want to understand how a lion hunts don't go to the zoo. Go to the jungle." - A G Lafley, CEO of Procter and Gamble

When high speed internet connectivity first became available in the late 1990s, it connected fewer than 2,000 homes nationwide to the Internet. Telecommunications companies struggled with how to position their new product. How could they convince potential customers that they needed this new technology?

At first, marketing campaigns revolved around the technology itself: Messaging focused on upstream and downstream bit rates, and abstract speed comparisons of downloading files with a dialup versus a high speed data connection. "If we could only convey the experience of the speed more effectively!" one marketing person commented.

These ads, much as they were based on proof points that tested well with potential customers in focus groups and surveys, failed to sell the product, primarily because the presented "benefits" were meaningless in customers' day-to-day lives. Upstream and downstream speeds had little relevance to customers who used their computers primarily for conducting business or keeping in touch with family members.

One high speed data company decided to try a different approach: they sent anthropologists into customer homes to find out what broadband connectivity "meant" in the domestic context. In comparing observed activities in homes connected with dial-up and homes connected with cable modem, researchers identified differentiating behaviors related to the respective technologies.

Because the cable modem was "always on," families found more value in their computers and the Internet. They didn't say this, but it was evident from their behavior. They moved their computers to more public areas of the house, where they could be more easily and more conveniently accessed. They used the Internet more frequently in shorter spurts, integrating use with other household activities, boosting usage to more than four times the average use in the dial-up homes.

The resulting findings from this company's initial study changed the face of broadband advertising and messaging. Messaging in the whole industry became focused on behaviors enabled by the technology, rather than on the technology itself, and this resonated with customers' experiences. Broadband quickly became redefined across the industry not as a technology but as a new way of life, and the catch-phrase "always-on" was born.

INTRODUCTION

Market researchers and their clients have long relied on qualitative research methods, principally in the form of focus groups and in-depth interviews. In recent years the qualitative research toolkit has expanded to include ethnography, a term that refers to a complex set of theories, practices and analysis techniques developed primarily in the fields of anthropology and sociology.

Although ethnographic approaches have quietly informed advertising and product design since the 1970s, most business professionals, including market researchers, are not that familiar with these approaches, and those who encounter ethnography for the first time are often skeptical about the validity of the approach.

During the 1980s and 1990s, the use of ethnographic research gained acceptance and publicity in the technology industry. Anthropologists, using their eclectic set of in situ methods, were able to tap into customer experience in a way that market researchers could not from behind the glass. This is why large industry players such as MediaOne, Xerox, Apple, Intel, Microsoft, AT&T and the “Big Three” automotive companies are among the many companies who have employed and continue to employ anthropologists to identify early trends and behavior patterns relative to their markets.

WHAT IS ETHNOGRAPHY?

Ethnography, in the broadest sense, refers to a broad array of methods and analysis techniques informed by decades of anthropological theory. This said one method, more than any other, distinguishes ethnographic research from other qualitative methods: participant observation. All ethnographic research includes this method to a greater or lesser degree.

Participant observation, in its ideal form, involves a researcher joining a “community,” participating in its daily activities, and recording pertinent data. The purpose of participant observation is to gain an understanding from an insider's perspective, but it also gives the researcher an opportunity to observe actual behavior, instead of relying on self-reported behavioral data. Although participant observation is the mainstay of ethnographic research, ethnographers commonly use other qualitative and quantitative research techniques in conjunction with it, including informal and formal interviews (both structured and unstructured), surveys, diaries and various forms of written, audio and visual documentation.

Participant observation often looks somewhat different in industry than it does in more traditional anthropological research venues in which the researcher lives for a prolonged period. More often than not, the industrial researcher cannot “live” in the research context, but the aim of ethnographers in industry is still the same—to understand insiders' perspectives, and to understand behavior and beliefs within a defined context.

As a substitute for living within a studied community, ethnographers may use various tracking techniques to record actual behavior, including time-lapse photography or video, technologically tracking behaviors relative to a piece of equipment (print logs, computer tracking, etc.), audio, video and text diaries. Typically, such data would not be used by themselves, but would be used in conjunction with other data and as stimuli in conversations

with study participants. For example, the researcher might observe a pattern of use in a computer log, and would ask questions relating to the context of the use at a later time.

Depending on the focus of the research, the research site can be a workplace, a buying environment, the home or a combination of locations as in the example study above. Normally site visits include a combination of semi-structured and unstructured interviews. We document site visits in various pre-determined ways, including video and audio recording, photography and “artifact” collection. Depending on the nature of the inquiry, we may ask the participant to collect some data for us in advance of our site visit.

These data could include items like personal computer logs, printer logs, printed materials, photographs taken with a digital or disposable camera, and so forth. Materials like these often serve important functions in our conversations with participants because they help participants ground their stories in concrete events and objects that they might not have remembered otherwise.

Ethnographic research usually is not based on a priori notions of the outcome of the research; ethnographers use an inductive rather than deductive approach. As such, ethnography does not rest on hypothesis testing. The idea is to understand the view of an environment or a culture (company, workgroup) from the perspective of its insiders (knowledge workers in the general office, purchase decision-makers, etc.). Typically, ethnographic research begins with a set of broad questions, and moves in to more specific questions. In this way the researcher can begin to build an understanding of behavior and beliefs within the broader context of unspoken and undocumented rules at operation within the culture in question.

WHEN SHOULD ONE USE AN ETHNOGRAPHIC APPROACH?

One common error that people make when they discover the power of ethnography is in trying to apply it to every research problem they have. Ethnography is not a panacea; not all research questions lend themselves well to an ethnographic approach, while others, like the ones outlined below, demand it.

You may want to consider an ethnographic approach when the topic, product or service in question:

- Has a strong social component;
- Crosses cultural boundaries;
- Relates to sensitive personal behavior that is less likely to be reported accurately using other data collection methods;
- Is exploratory, an effort to understand a new domain, or to expand upon one that has stagnated; or
- Is design oriented, and the use context of the product in question is either poorly understood, or may give designers new insights about product enhancements or future directions.

Let's explore each of these circumstances in more detail.

Strong social component. Inherently social technologies—for example, communications technologies, including the telephone, the internet, instant messaging and email—are best understood through ethnographic research, primarily because communication is better observed in context than talked about in focus group facilities. Because people are not particularly reflective about their day-to-day communications, and they communicate so automatically that only out-of-the-ordinary communications are memorable, they are likely to grossly under-represent their activities, and to omit salient details, like habitual physical cues and body language that an observer might capture.

Ethnographic research is also useful for gaining an understanding of the social importance of technologies that may not have overt communication or social purpose. Many inventions, like the first camera, were not intended for the social uses to which we put them today. The camera became a social object in the hands of users, who took pictures, ascribed values and meaning to them, and exchanged images. Imaging companies, like Kodak and Polaroid, have successfully used knowledge about the social importance of photographs gained through ethnographic research to guide development of many products, set product strategies, and position them effectively in the market. Inventors of countless technologies, from screwdrivers to computers, never envisioned all of the possible uses of their tools. By observing the social use and relevance of products in business and consumer contexts, companies can find new markets and product enhancements.

Crosses cultural boundaries. A common mistake many companies make is in assuming that their products will be used and perceived similarly throughout the world, or that the technologies themselves will sell their product—a “what sells here will surely sell there” mentality. Understanding values, beliefs, economic factors, and social behavior patterns across cultures is critical to positioning products that will sell. This is why so many companies have turned to ethnographic studies to get a deeper understanding of the cultures they are targeting for distribution.

Cross-cultural ethnographic research has been critical for informing the cell phone industry, including companies like Nokia, Ericsson and Motorola, each of which have used ethnographies to help position products and create enhancements that make products more appealing to members of different cultures worldwide. These enhancements range from marketing prepaid disposable cell phones in economically challenged parts of the world to selling decorative face plates and neck-straps in parts of the world where phones are of personal symbolic importance.

During the product design/refresh cycle, companies tend to focus on features and functions—how their product works. In many instances, however, a product has more than a functional use-value; it also has a symbolic value—“what it says about me” as a consumer or a business. Ethnographic techniques are ideally suited for understanding the symbolic value of material culture.

Personal behavior. Data on personal behavior, habits and personal beliefs are especially difficult to elicit in focus groups and surveys. Many people are reluctant to talk about things that they consider personal in a group setting, while in the case of habits, many people are simply unaware of behaviors they engage in habitually. Even something as seemingly impersonal and harmless as television viewing habits routinely gets misrepresented in artificial research settings. Companies like Nielsen have long struggled with accuracy issues

in tracking the television viewing habits of households, because their methods, although somewhat mechanized, still rely on viewer-initiated input. Many people are embarrassed to reveal to others, and to themselves, how much television they watch, while some honestly have no idea because the television is on all the time, even though no one is watching it.

Observational approaches to understanding media consumption have proven fruitful in a number of different industries. For example, behavioral research on personal video recorders revealed that people often forgot to schedule programming, and that they would remember when they had wanted to when they were at work, when it was too late. This finding, although seemingly obvious, resulted in the development of a remote scheduling system that takes advantage of the web. Observational research also helped to position personal video recorders as something other than “advertisement skipping” machines. While this clearly is an attribute of personal video recording that people value, it did not represent a viable way to position the product given the broadcast industry's dependence on advertising.

Research showed that what was of even greater value to households than “advertisement skipping” was that personal video recording technology improves the quality of time spent with the family. For example, one woman reported that her husband used to be non-communicative when watching sports, which was all of the time. After getting a personal video recorder, their relationship improved because he became “available” to attend to her brief and sometimes long interruptions while not missing anything in his games.

Design-oriented research: new domains or expansion of old ones. Product innovation research is usually focused on a particular domain. For example, a large telecommunications OEM might have a strong business customer base, but wants to begin a new line of products targeted at families, so launches a study focusing on how members of busy professional households stay in touch and coordinate with one another daily. In the process, researchers will lay important groundwork for product design and in all likelihood discover a number of unmet communication needs, which in turn will spawn new product and service ideas.

Gaining an in-depth understanding of a new domain at the beginning of the product development cycle, even before stepping into a focus group facility, is critical. Without a clear understanding of the contexts of use for the products under development, manufacturers are more likely to design products that won't address the needs of targeted customers. Even if one doesn't have the budget to do a full-blown ethnographic study, it can be quite useful to do a “quick and dirty” ethnographic study of the new domain to lay a solid foundation of understanding for brainstorming and development of future research.

The “Always-On” study, described at the beginning of this paper, exemplifies the use of ethnography for the exploration of a then-new technology domain—high speed data connectivity to the Internet. The open-ended exploration of this domain ended up helping the company successfully reposition its product. Examples of other technology domains positively influenced by findings from ethnographic research include personal computing, mobile computing, tablet computing, wireless networks and digital imaging. In each of these cases, researchers sought to identify patterns of behavior around new technologies or a technology that was pushing the envelope of an older technology. This type of exploratory research is usually quite open-ended; the goal typically is not to find a solution to a known problem, but to discover unarticulated needs—needs expressed through behavior. An example of an unarticulated need expressed through behavior might be a person hanging up

the phone, dialing into the internet, looking at their watch, getting frustrated, finally getting connected, checking a movie time, and calling the person they were talking to back. This is an example of a behavior so taken-for-granted that it would never be reported using any other method of data collection.

Ethnographic research can and should be used at many different points in the product development cycle, from early exploration leading to product innovations in a particular domain, to re-design of existing products, to informing decisions about packaging and product placement on store shelves.

Mixing and matching methods. In many cases, choosing ethnographic techniques or traditional research does not have to be an either/or scenario. Academic ethnographers often supplement observational research with sample surveys and structured interviews; likewise, as commercial researchers, we have complemented traditional techniques with what we call quasi-ethnographic practice in the appropriate situations. For any of the reasons we've mentioned above, it may make sense to schedule one or more site visits with respondents from a prior qualitative or quantitative research phase. (There's no reason the respondents need to come from a previous element of the research program, but doing so often allows us to marry different types of data into a richer understanding of the respondent and can often reduce recruitment costs.)

For one design-oriented study, Dexus interviewed 120 purchase decision makers for PC peripherals in six countries regarding their opinions on several different concept designs. One issue that we were interested in understanding was the space constraints and design awareness as reflected in the design of the workplaces in those countries. We wondered whether there would be consistent differences by country. While it would not have been feasible, or even desirable to do a full-fledged ethnographic study on this topic, doing several interviews in each country in situ allowed us to document the use of space, typical placement of the peripheral, décor, and to address specifics in the participants' environments that were of relevance to the broad project effort. The site visits, although not adding much to the cost of the project, added value in the revelation of differing design sensibilities in different countries. The photographs we were able to take on site substantiated much of what we heard in the facility-based interviews, and added substantially to the punch and persuasion of the final presentation. Results from the in situ interviews and observation also helped reduce the client's concern that size of device was a major barrier. Based on participants' reactions to the product concepts in an artificial setting, we would have assumed that the product footprint was a major purchase barrier. Placed in actual usage context, however, participants reacted much less negatively to footprint and size. As a result the client was able to focus on other design and usability improvements that didn't challenge the basic engineering constraints of product design.

CASE STUDY: MEDIA CONSUMPTION STUDY

A media company wants to understand the motivations and beliefs driving media consumption among a subset of their customers to better position their products in the market. Because the media product has strong social and symbolic components, they opt to do ethnographic research as follows.

In home research: Two to three hour home visits to establish rapport—during the visit we document in-home media, equipment and in-home context of media use; collect anecdotes relevant to particular media possessions, learn about participants' involvement in social venues for media consumption.

Digital cameras and audio recording devices are distributed for participants' collection of “media moments” during the study period. These findings will be used as stimulus during the final interview.

Experiential phase: Using a technique called “experience sampling,” researchers will interact at random times with the participants for two to four weeks using methods appropriate to the individual—paging, email, instant messaging, bulletin boards, telephone, etc.

The final event of the experiential phase will consist of a media consumption venue visit. This visit will take place in a location of the participant's choosing, the only constraint being that it must be a place where they purchase media.

Two weeks into the experiential phase, cameras and tape recorders will be collected for analysis.

Final interview: At the end of the study, researchers conduct a one-hour interview with each participant, during which time they discuss selected images and collected audio files.