



Practical Ethnography

A Guide to Doing
Ethnography in
the Private Sector

Sam Ladner

ROUTLEDGE



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To every single one of the people I have met in my research.

Your stories make me know what it means to be a human.

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Chapter 1

Introduction

I remember the exact moment when I discovered the power of observing. I was in journalism school. Our professor, Eugene, was a veteran newspaperman, the kind of guy who'd give you props for a well-placed comma. He taught "print reporting," as it was called back then, but what he was really teaching us was how to notice things.

Eugene used an old-fashioned lectern. He'd stand there at the front of the room, looking at us sternly through his glasses, his hands resting at the top of the lectern. He had a habit of rolling up his shirtsleeves when he was about to make an important point. That day, we were reviewing a selection of newspaper stories he'd selected for us to read. When he started to roll up his sleeves, I started paying attention.

Eugene was reviewing a story about a police officer who was killed in his car. The journalist described how the officer was found, sitting in his car with, "his finger still hooked into the handle of his coffee cup." Eugene looked up from his lectern. "What did you notice about this story?" he asked.

The finger still hooked into the coffee cup was a colorful detail. Indeed, that's exactly what Eugene told us: details offer color. He pointed out that we could see a picture in our minds with details like that. He said it didn't hurt that it was a cop drinking coffee—it plays off the stereotype.

I used that trick myself in a story adding the “detail” of a toothpick. I wrote a story about a middle-aged man learning to read. I wrote that he “took the toothpick out of his mouth and then explained” something. I even got noticed by a big-shot editor for that detail. I didn’t know it at the time, but it was my first lesson in the power of observation.

My first lesson—and I learned it wrong.

There’s more to ethnography than merely seeing “details.” Details are description. Ethnography goes further; it provides explanation. Ethnography is about understanding meaning, not just “details.” Ethnographers connect details to wider patterns of social life. Mere details can be gathered into lists and reported back. The cop’s finger was hooked into his coffee cup. So what? What does this mean? It could mean he wasn’t expecting violence. It could mean he was caught by surprise. The detail of the coffee cup has *meaning*. It is the ethnographer’s job to explain that meaning.

This is exactly what anthropologist Clifford Geertz (2000) meant when he described culture as “webs of significance that man himself [*sic*] has spun.” What Geertz is saying is that culture is about the meaning we collectively ascribe to objects, people, and events. Culture is about meaning, and ethnography is a method to explain that meaning. Details are not meaning; they are just a list of things that happened.

The difference between “noticing things” and ethnography is that ethnographers make every attempt to decipher the meaning of a vague European accent or a nervous, bouncy knee. One must explain the significance of the bouncy knee: before a race, in a doctor’s office, or at a family dinner. The ethnographer puts her opinions on the line; she suggests a meaning. She is not content to “let the reader decide” what this thing means. She will make an effort to explain, not simply describe.

This is a terribly difficult endeavor, in so many ways. How do you know what’s important and what isn’t? I’ve seen many novice researchers become overwhelmed quickly in the field. They begin to “notice” everything, relevant or not. They are quickly weighed down by meaningless and endless field notes. They miss things sitting right in front of them because they’re too busy trying to notice things.

In some ways, explanation is doubly hard in private-sector ethnography. Academic ethnographers use social theory and rigorous method

to avoid the “noticing everything” problem, but they also have the luxury of longer timelines. Private-sector ethnographers must adapt academic theory, method, and timelines to suit their research needs. Designers have taken up ethnography keenly in the private sector, and understandably so; they are natural observers. Designers tend to notice “details” like buttons that don’t work, signs that point the wrong direction, and error messages that make no sense. Noticing how things are broken is an important trait in a designer, but it is not enough for ethnography. Ethnographers must explain why that error message makes no sense, in that particular context for those particular people. Good explanations provide general principles that can then be applied to other design problems. Poor explanations only work for that one instance or context.

This book is a practical guide to doing ethnography in the private sector. It is written for two kinds of people. First, I am writing for social scientists who want to take their skills out of academia and into the corporate setting. This is a largely pragmatic reaction to the virtual disintegration of the academic job market. In 1975, 57% percent of faculty were either tenured or on the tenure track. By 2009, that number had fallen to 31% percent (Wilson, 2010). That leaves two-thirds of PhDs with few options other than the private sector, yet few of their professors have any private-sector experience or familiarity.

You may be an anthropologist or sociologist and you want to adapt your research skills to the applied setting. You are probably familiar with social theory and method, but have never provided specific product or design recommendations. Your supervisors have little to no advice to give you about embarking on this journey. This book will help you translate your knowledge and skills into a practical application. It might also teach you how to create a job or a business that uses your academic skills. Your skills will help you become a research consultant, market researcher, or even a product designer. You will get the most value out of the chapters on tools, managing clients, and this chapter, which describes why ethnography is gaining popularity in the private sector, and how to increase its uptake even further.

Second, I am also writing for people who are already working in the private sector but may not have robust academic training in the

ethnographic method. You could be a product manager, a designer, or a market researcher. You want to deploy the innovative power of ethnography, but you need a practical, step-by-step guide to help you do it. This book will help you improve your research skills. It will also help you get organizational buy-in for using ethnography as a method for innovation, design, or consumer insight. You will get the most value out of this introductory chapter and the theory chapter, which explain what ethnography is and why it differs from other research methods. You will also benefit from the step-by-step chapters on how to do ethnography and produce deliverables.

Feel free to skip around this book. Take your time, skip the parts that lack relevance for you. This book is not a scholarly textbook. It is not intended as a guide to academic research, nor is it an academic meditation on methodology itself. My goal with this book is to improve the quality and rigor of ethnographic research in the corporate setting—not to debate the arcane intricacies of academic debates. Academics wanting that kind of literature review are encouraged to look elsewhere.

What Comes Next

This book is organized loosely around the steps of a typical corporate ethnography project. I start with the intellectual heritage of ethnography and explain why ethnography is relatively uncommon in the corporate sector. I then offer readers an argument in favor of using theory in this kind of research, and a selection of social theory that I have used for my own corporate ethnography practice. Specifically, I cover concepts such as social capital, gender, economic class, and the presentation of self as tools for organizing and cohering your ethnographic research before you go into the field. From there, I follow the steps of a typical ethnographic project, from project management to technology and tools to client management and reporting. I show readers the nuts and bolts of a well-run ethnographic project. Unlike academic textbooks, I show ethnographers how to work in the culture of the private sector, the pitfalls to avoid, and the different kinds of reports and deliverables you can produce. In the final chapters of this book, I extend the ethnographic lens to other methods, including online research, focus groups, and usability studies.

What Is Ethnography?

Ethnography is the study of culture. It is from the Greek “ethno,” meaning folk or culture, and “grapho,” meaning writing. Historically, it has meant simply “writing about culture,” although today there are other ways to tell ethnographic stories, including audio, video, and even graphic novels. Ethnography’s history as a method is one of long term, academic commitment. It is no wonder it is difficult to apply in the private sector because it was designed for the university.

Ethnography is often associated with anthropologist Bronisław Malinowski. Malinowski was born in Cracow, Poland, on April 7, 1884. He was steeped in innovative research in both his family and his university training. His father pioneered new ethnographic methods to trace the development of Slavic languages. Malinowski himself later studied mathematics and physics at Cracow’s Uniwersytet Jagielloński, the same university where the groundbreaking astronomer Nikolai Copernicus argued the earth revolved around the sun. Malinowski’s scientific training taught him how to collect quantitative data and instilled in him an appreciation for the functioning of rules and regulations. But instead of becoming rules-bound in his research, Malinowski saw that rules were both followed and flouted. As his biographer Michael Young points out, Malinowski learned that “people evaded rules, almost as often as they obeyed them” (Young, 2004, p. 75). Searching for patterns, regularity, and the exceptions to that regularity became the hallmark of Malinowski’s method. Eventually, Malinowski relocated to the London School of Economics, and to fieldwork in the Pacific in the Trobriand Islands. He produced the book *Argonauts of the Western Pacific*, which is often hailed as the first ethnography.¹ This book detailed the complex gift-giving activities of these islanders. Through detailed description and then explanation, Malinowski showed how culture is brought to life through everyday behaviors.

Malinowski’s work inspired many anthropologists to apply the same methodical approach to understanding “exotic” cultures. Margaret Mead famously travelled to Samoa to research coming-of-age rituals. Later, she went to Bali, where she and her husband and colleague, Gregory Bateson, researched coming of age experiences. In her Bali fieldwork, Mead took 25,000 photographs, which by today’s standards sounds reasonable. But

in the 1920s, this meant 22,000 feet of film (over 60 football fields!) that had to be developed, printed, and annotated (Library of Congress, 2001). Imagine the prolonged effort and focus that took.

The ethnographic method is steeped in this patient approach to documenting social life and making interpretations about its meaning. Malinowski detailed the enormity of the work in a letter he wrote immediately following his fieldwork in the Trobriand Islands:

I estimate that my future publication will be voluminous, roughly three volumes of 500 pages each at 500 words per page. It will take me about two years to get the [manuscript] ready and see it through the press. My material is now a chaotic mass of notes. To work it out and put it into the right theoretical frame is perhaps the most difficult, exacting, and important stage of research. (quoted in Young, 2004, p. 82)

Malinowski had an enormous number of “details,” but the struggle was to put it “into the right theoretical frame,” or to explain the meaning of these details. He persevered through a “chaotic mess of notes.” It was a long commitment.

Malinowski’s and Mead’s brand of long-term, methodical ethnography continues in academia today. Some wonderful contemporary examples of ethnography include Paul Willis’s fieldwork in British classrooms, that led to his ethnography, *Learning to Labour*, and Doug Foley’s *Learning Capitalist Culture*, a 14-year odyssey with Latino youth in Texas. A team of researchers spent almost five years collecting data for their ethnography, *Crestwood Heights*, the ethnography of a Toronto-area neighborhood in the ‘50s. More recently, the authors of *Busier Than Ever* spent over a year in the field with the rushed families of Silicon Valley. Ethnography has even caused a sensation, as did Sudhir Venkatesh in his book, *Gang Leader for a Day*, the controversial ethnography of his experiences with Chicago drug gangs. All of these examples show the classic anthropological approach: long-term, embedded observation within the community, interviewing, the methodical collection of data, and most importantly, the constant attempt to explain what life means to these people. It is this final characteristic of ethnography—the participants’ viewpoint—that is the most important reason to use ethnography in the private sector.

Ethnography's Value to the Private Sector

Academics may be surprised to learn that ethnography is now garnering attention in the business world. Rotman School of Management dean Roger Martin calls it “an essential tool” for innovation, while *Businessweek* calls it the “new core competence.” Whether you are an independent ethnographer, work for a research vendor, or are an ethnographer internal to the organization, you will have “clients” in the sense that you have people who will be using your findings to design, implement, improve, or launch something. Ethnographers can help their clients in unique and powerful ways.

There are two major reasons why ethnography has recently gained popularity in the corporate world. First, ethnography is conducted in context, providing new insights into the other objects, people, and products that consumers are currently using. This *in situ* method contrasts with focus groups, surveys, and “Big Data,” which take place either in a facility, or simply on the researcher’s computer desktop. Ethnography, by contrast, collects direct insight about the contents and people in the consumer’s home, car, or office, all of which affects consumer choice and product use. This provides opportunities for product innovation. An ethnographer may discover, for example, that parents use jerry-rigged bungee cords to strap iPads to the backs of their car seats. Children are entertained with movies, while parents can concentrate on the road. The ethnographer may conclude that there is a product opportunity: to replace these bungee cords with a customized iPad holder. This kind of insight only comes from contextual observation.

The second reason why ethnography is valuable in business is because it takes a particular stance its practitioners call the “emic” position. That is, ethnographers strive to take the participants’ point of view. Sociologist Dorothy Smith calls this a “standpoint.” If you take the participants’ standpoint, it’s possible to see what would otherwise be invisible. Ethnographers try to understand the participants’ language, concepts, categories, and opinions, and use them to define their research. Focus groups, surveys, and analytics, by contrast, use the “etic” position, which is defined by the researchers. If you’ve ever taken a survey, only to find you don’t fit neatly into one of their little boxes, you have experienced the

etic position in action. The *researcher's* language, concepts, categories, and opinions shape the research. The emic position allows companies to create contextually nuanced and personalized products and services. This offers the potential of a differentiation of what Pine and Gilmore (1998) called the “experience economy” as far back as 1998. Consumers can now pick and choose between mere commodities; customized experiences require deeper insight into consumers’ wants, needs, and cultures.

The emic position puts the *research participant* in the center. When ethnography is used in the private sector, this means it is the *consumer* who defines what a product means *to him or her*, which can then be interpreted and built upon by product managers and designers. Ethnography puts consumer needs first, which means a product based on ethnographic research will solve real consumer problems. Other innovation methods are usually etic; they take the company’s standpoint. Innovation strategies like Six Sigma, Kaizan, and lean production start with the *company's* needs. These methods tend to have the *company's* standpoint, not the consumer’s. Ethnography starts with the consumer’s standpoint and defines products, services, and marketing messages according to that standpoint. Its power, then, stems fundamentally from its emic position. To illustrate the difference between emic and etic standpoints, let’s use an example.

Etic Versus Emic: The Example of Starbucks

For 24 years, there was a curious phenomenon at the intersection of Robson and Thurlow streets in Vancouver. Two Starbucks sat kitty-corner to each other, one on the northeast corner, the other on the southwest. Imagine a researcher tasked with finding out which of these Starbucks is more valuable to the company. The etic researcher might start by using concepts important to the company. She may use “variables” like how many people go in and out, how many lattes versus americanos are served, how many staff work there, how much money is earned. If all these data were collected through the point of sale system, she could do her analysis without ever seeing this iconic Starbucks Corner. She may decide the southwest store is less profitable and should therefore be closed. In this view, the two stores are compared using exactly the same criteria. She may come up with an answer without ever having seen the two stores.

The etic researcher may decide which store is more valuable without even knowing the customers' standpoint.

The ethnographer, by contrast, would start by understanding what these two stores *mean to the customers*. She may collect data about the same kinds of things the etic researcher would, but her standpoint would be from the customer's perspective. She'd ask customers why they chose one store over the other. She'd observe the Harley Davidson motorcycles parked next to the store on the southwest corner. She may ask some of the bikers why they chose this store, and probe around the times they come. In the northeast store, she may notice there are more briefcases being carried into the store. She might ask people why they come to that store, only to be rebuffed with "I don't have time to talk." Her emic standpoint would tell her that people in northeast store are fast-paced, business people who see the store as a "to go" location. Her emic position may also tell her that the southwest store patrons see "their" store as a community hangout. She may conclude that the southwest store is a "community" store, while the northeast store is a "volume" store. Both stores are valuable to their customers, she would conclude, but for different reasons. Her ethnography would explain the customer perspective, and her recommendations would compare this to the company's perspective. What is important to customers? What is important to the company? How can we align these interests?

It turns out that the southwest store did indeed close in the spring of 2012. It was the end of an era. On its last day, the store's doors were ceremoniously locked for the last time. Staff members hugged longtime customers. A few tears were shed. The northeast store continues to be open.

It's unclear if an ethnographer had any role in that decision, but if she had, it would have been difficult to deny that the bikers now have nowhere to park their Harleys while they pick up a latte. Did Starbucks make a mistake with this decision? Starbucks CEO Howard Shultz noted that overexpansion was one of the major threats to the Starbucks brand. He argues in his 2011 book that the company does not sell coffee so much as the experience of coffee (Schultz, 2011). Without knowing much about how this particular decision was made, I would argue this was likely a hard decision, but perhaps one that missed the opportunity to cement the brand as one devoted to experiences instead of products.

The emic perspective often throws a wrench into the typical corporate decision-making process. What is “true” to a customer may not be “true” to the company. In the next chapter, I’ll explain that there are indeed several ways to think about “truth.” “Ethnographic truth” is a distinct kind of truth that differs from traditional market research. And it needs to be communicated differently.

Chapter 2

Using Theory in Ethnography

How do researchers know if their findings are “true”? I never considered that question—until I took a research methods class in graduate school. I learned that there is more than one way to judge research validity. My professor, Catherine, was the first person to show me that different kinds of research produce different kinds of “truth.”

Catherine had the unfortunate habit of terrifying me with her intelligence. One day, Catherine wore her navy blue suit and looked every bit the part of the elder stateswoman. She was explaining what it meant to know something is true—at least that’s what I thought she was explaining. It all got a bit fuzzy when she used the word “verisimilitude.” I almost passed out from the fear. This was the beginning of my intellectual journey to ethnography.

We must all grapple with terrifyingly complex ideas in order to become good ethnographers. Becoming a good private-sector ethnographer means you must understand your research method *and* be able to explain it to your clients and stakeholders. Practically speaking, this means you must know how to do ethnography but also how to *think about* ethnography. It demands of us a higher order level of understanding. We have already discussed the “emic” orientation of ethnography. This standpoint necessarily shapes the way we research and the theories we use to interpret our findings. In this chapter, I introduce you to a kind