Ethnography & the Observation Method

15 Articles on Design, Implementation, & Uses

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The contents of this compilation include a selection of 15 articles appearing in *Research Design Review* from 2013 to 2021 concerning ethnography and the observation method. Excerpts and links may be used, provided that the proper citation is given.

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Ethnography: A Multi-method Approach

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](#) (Roller & Lavrakas, 2015, pp. 182-184).

There are several key strengths associated with ethnography. A critical differentiator of ethnography from other qualitative methods, that contributes greatly to the credibility of the data, is the *in situ* approach which allows the researcher to observe people's actual experience. Another strength of ethnography is the process of immersion, especially if the observer assumes [the role of complete participant](#), which enables the researcher to gain a sensibility and depth of understanding of the contextual, emotional, and social factors that define meaning within a group or for an individual.

Complementing the immersion process is the fact that ethnography is not an observation-only approach. Although observation typically represents the key component to an ethnographic study, true immersion and absorption in the study environment is derived from gaining participants' input on many levels. Researchers often use observation as a starting point in the field from which they form an idea of where they need clarification or follow-up. This often leads to in-depth interviews or group discussions with participants and, in some instances, influential others (e.g., parents of the children participating in the Christensen et al. [2011] study). Unlike the multi-method approach discussed [in this article](#), the utilization of multiple data sources in ethnography is squarely focused on augmenting the researcher's observations, with the observations serving as the primary data. For example, an overt observer's targeted questions may allow participants the opportunity to contribute their thoughts of what is going on in the study environment, help to clarify observed events for the observer, and enhance the observer's ability to ultimately find patterns or themes in the study activities along with the meanings that participants associate with their actions. For a [covert participant observer](#), this same process of augmenting observational data has to play out much more subtlety and with continued subterfuge, since the observer must avoid "blowing cover" while, at the same time, probing for information to help identify the patterns or themes without appearing to be doing so.

An ethnographic researcher studying the use of skiing equipment, for instance, might ask the skiers who are being observed (during a ski trip the researcher is taking with them) to discuss the circumstances that resulted in their switching helmets or the reasons they made particular adjustments on their skis. For the overt researcher these queries would be done explicitly and directly, whereas for the covert researcher they would be worked into what otherwise would appear to be normal conversation with other skiers. Other ancillary methods such as the review of relevant documents can also enrich observations and strengthen an ethnographic study overall. Russell et al. (2012), for example, were better able to understand their observations of team interaction among clinical and administrative staff in primary care offices by analyzing the internal communications and minutes from office meetings.

Christensen, P., Mikkelsen, M. R., Nielsen, T. A. S., & Harder, H. (2011). Children, mobility, and space: Using GPS and mobile phone technologies in ethnographic research. *Journal of Mixed Methods Research*, *5*(3), 227–246. https://doi.org/10.1177/1558689811406121

Russell, G., Advocat, J., Geneau, R., Farrell, B., Thille, P., Ward, N., & Evans, S. (2012). Examining organizational change in primary care practices: Experiences from using ethnographic methods. *Family Practice*, *29*(4), 455–461. https://doi.org/10.1093/fampra/cmr117

From Sociology to Health Care, Psychology, Education, Communication, & Marketing Research: The Many Uses of Ethnography

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](#) (Roller & Lavrakas, 2015, pp. 177-179) which is a qualitative methods text covering in-depth interviews, focus group discussions, ethnography, qualitative content analysis, case study, and narrative research.

Ethnography is used across the health and social sciences where the goal is to gain an in-depth understanding of the meanings associated with particular customs or behaviors by living the experience to the degree possible. Anthropologists have traditionally conducted lengthy and entrenched ethnographic studies among native tribes in distant lands; however, beginning in the early 1970s, anthropologists such as Spradley (1972) put their ethnographic skills to work closer to home, researching social groups on American soil, such as men on skid row (and, specifically, the "culture" of alcoholism). The observation method (along with ancillary methods) has since been utilized by anthropologists to study a host of Western social groups and phenomena, expanding even into the virtual online world with, for example, Internet-based research to examine the expatriate experience in Buenos Aires (Freidenberg, 2011).

Researchers in the health sciences have used onsite nonparticipant observation coupled with in-depth interviews to study the level of advice and knowledge pharmacists impart in their interactions with their customers (Cramer, Shaw, Wye, & Weiss, 2010), the obstacles nurse board members face in impacting community health care policy (Hughes, 2010), and the treatment of older people with dementia in the hospital setting (Jurgens, Clissett, Gladman, & Harwood, 2012).

Ethnography has been used in the field of psychology in work that ranges from onsite nonparticipant observation of decision making in closed facilities of the mentally ill (Lyall & Bartlett, 2010) to planting covert observers in psychiatric hospitals (i.e., complete participant observation) to study the environment in which psychiatric diagnoses are made (Rosenhan, 1973).

Sociologists such as Haenfler (2004) and Williams (2006) have used the methods of complete participant observation and online ethnography, respectively, to study

the youth "straight edge" subculture in order to understand the values and belief system of this group as well as the personal experiences and meanings in identity associated with belonging to this subculture, including the pledge to abstain from recreational drugs, alcohol, and tobacco.

Researchers in education have used ethnography to investigate the in-classroom experience, specifically teachers' approaches to educating school-age children on topics such as environmental issues (Cotton et al., 2010), as well as values and morality (Thornberg, 2008).

With the advent of digital communications, journalism researchers have conducted ethnographies to study how newsrooms are dealing with the transition from print to online publication (Robinson, 2011) as well as the use of new technology (Mabweazara, 2010).

Ethnography has also become popular among corporate and marketing researchers. "Corporate anthropologist" Brigitte Jordan, for example, conducted an ethnographic study for Intel Corporation in their assembly plants in Costa Rica and Malaysia to study the interaction, communication, work-flow issues, and productivity among employees (Jordan & Lambert, 2009). Mariampolski (2006) has adapted ethnography for marketers to observe consumers and business customers going about their daily routines in their natural environments. These ethnographic studies have included the investigation of diabetes patients' use of glucose measurement devices; at-home use of paper towels and potential new uses of paper towels; decision making at the retail level for a variety of consumer goods manufacturers (e.g., shelf-stable Mexican foods) by way of "shop-along" observation (i.e., the researcher shops with the consumer participant as a passive participant); consumer behavior associated with seasonal and year-round barbecue grilling; and how various types of businesses compile reports for their customers utilizing specific office equipment.

Another obvious use of ethnography is in the study of open spaces. This includes research into such areas as the public spaces at a university library and how these spaces impact students' learning experiences (May 2011), as well as the design and social implications of the coffee shop as a community gathering space (Waxman, 2006).

Although ethnography may not be associated with research on delicate or sensitive topical areas, there are instances when ethnographers have successfully completed nonparticipant observational studies on sensitive issues. One example is the work Mariampolski conducted for faucet manufacturer Moen, Inc., to observe showering behavior among consumers (see ElBoghdady, 2002). In that study, the researcher

recruited "social nudists" to be videotaped (using a specially devised video recording system) while going through their usual showering routine. As another example, Forbat, White, Marshall-Lucette, and Kelly (2012) report on a study involving onsite nonparticipant observations of clinician–patient consultations with men in various stages of prostate cancer treatment. The purpose was to learn what is spoken (and what is implied but not spoken of directly) in these consultations by the clinicians with patients (and their partners who also attended these consultations); and, specifically, the content and manner in which the topic of sexual functioning was discussed.

Cotton, D. R. E., Stokes, A., & Cotton, P. A. (2010). Using observational methods to research the student experience. *Journal of Geography in Higher Education*, *34*(3), 463–473. https://doi.org/10.1080/03098265.2010.501541

Cramer, H., Shaw, A., Wye, L., & Weiss, M. (2010). Over-the-counter advice seeking about complementary and alternative medicines (CAM) in community pharmacies and health shops: An ethnographic study. *Health & Social Care in the Community*, *18*(1), 41–50. https://doi.org/10.1111/j.1365-2524.2009.00877.x

Forbat, L., White, I., Marshall-Lucette, S., & Kelly, D. (2012). Discussing the sexual consequences of treatment in radiotherapy and urology consultations with couples affected by prostate cancer. *BJU International*, *109*(1), 98–103. https://doi.org/10.1111/j.1464-410X.2011.10257.x

Freidenberg, J. (2011). Researching global spaces ethnographically: Queries on methods for the study of virtual populations. *Human Organization*, *70*(3), 265–278.

Haenfler, R. (2004). Rethinking subcultural resistance: Core values of the straight edge movement. *Journal of Contemporary Ethnography*, *33*(4), 406–436. https://doi.org/10.1177/0891241603259809

Hughes, A. (2010). The challenge of contributing to policy making in primary care: The gendered experiences and strategies of nurses. *Sociology of Health & Illness*, *32*(7), 977–992. https://doi.org/10.1111/j.1467-9566.2010.01258.x

Jordan, B., & Lambert, M. (2009). Working in corporate jungles: Reflections on ethnographic praxis in industry. In M. Cefkin (Ed.), *Ethnography and the corporate encounter* (pp. 95–133). New York: Berghahn Books.

Jurgens, F. J., Clissett, P., Gladman, J. R. F., & Harwood, R. H. (2012). Why are family carers of people with dementia dissatisfied with general hospital care? A qualitative study. *BMC Geriatrics*, *12*(1), 57. https://doi.org/10.1186/1471-2318-12-57

(cont.)

Lyall, M., & Bartlett, A. (2010). Decision making in medium security: Can he have leave? *Journal of Forensic Psychiatry & Psychology*, *21*(6), 887–901. https://doi.org/10.1080/14789949.2010.500740

Mabweazara, H. M. (2010). Researching the use of new technologies (ICTs) in Zimbabwean newsrooms: An ethnographic approach. *Qualitative Research*, *10*(6), 659–677. https://doi.org/10.1177/1468794110380516

Mariampolski, H. (2006). *Ethnography for marketers: A guide to consumer immersion*. Thousand Oaks, CA: Sage Publications.

May, F. (2011). Methods for studying the use of public spaces in libraries/Les méthodes tion des espaces publics dans ies bibiothéques. *Canadian Journal of Information and Library Sciences*, *35*(4), 354–366.

Robinson, S. (2011). Convergence crises: News work and news space in the digitally transforming newsroom. *Journal of Communication*, *61*(6), 1122–1141. https://doi.org/10.1111/j.1460-2466.2011.01603.x

Rosenhan, D. L. (1973). On being sane in insane places. *Science*, *179*(19), 250–258. Retrieved from http://www.ncbi.nlm.nih.gov/pubmed/4683124

Spradley, J. P. (1972). Down and out on skid row. In S. Feldman & G. W. Thielbar (Eds.), *Life styles: Diversity in American society* (pp. 340–350). Boston: Little, Brown.

Thornberg, R. (2008). Values education as the daily fostering of school rules. *Research in Education*, *80*(1), 52–63.

Waxman, L. (2006). The coffee shop: Social and physical factors influencing place attachment. *Journal of Interior Design*, *31*(3), 35–53.

Williams, J. P. (2006). Authentic identities: Straightedge subculture, music, and the Internet. *Journal of Contemporary Ethnography*, *35*(2), 173–200. https://doi.org/10.1177/0891241605285100

Gathering Quality Ethnographic Data:
3 Key Considerations

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](#) (Roller & Lavrakas, 2015, pp. 204-206).

Data Gathering is one of two broad areas of the [Total Quality Framework Credibility component](#) that affects all qualitative research, including ethnographic research. There are three primary aspects concerning the gathering of data in ethnography that require serious consideration by the researcher in the development of the study design. To optimize the measurement of ethnographic data, and hence the quality of the outcomes, researchers need to pay attention to:

- How well the observers have **identified and recorded all the information** (e.g., verbal and nonverbal behavior, attitudes, context, sensory cues) pertinent to the research objectives and constructs of interest. A well-developed [observation guide and observation grid](#) can assist greatly in this effort. Not unlike the development of an in-depth interview or discussion guide, the ethnographer seeks to identify those observable events—including the specific individuals (or types of individuals), the verbal and nonverbal behaviors, attitudes, sensory and other environmental cues—that will further the researcher's understanding of the issues. During the design development phase, the researcher might isolate the observations of interest by:
    - Looking at earlier ethnographic research on the subject matter and/or with similar study populations.
    - Interviewing the clients or those who have requested the research to learn everything they know about the topic and their past work in the area.
    - Consulting the literature or other experts concerning the behaviors and other occurrences associated with particular constructs.
    - "Shagging around" (LeCompte & Goetz, 1982) the observation site(s) to casually assess the environment and begin to learn about the participants.

    (cont.)

- **Observer effects**, specifically—
    - *Observer bias*, that is, behavioral and other characteristics (e.g., personal attitudes, values, traits) of the observer that may alter the observed event or bias their observations. For example, an observer as a complete participant would bias the observational data if there was an attempt to "educate" participants on a subject matter for which the observer had personal expertise or knowledge.
    - *Observer inconsistency*, that is, an inconsistent manner in which the observer conducts the observations that creates unwarranted and unrepresentative variation in the data. For example, an on-site nonparticipant observer conducting in-home observations of the use of media and technology would be introducing inaccuracies in the data by observing and recording the use of television and gaming in some households but not in others where television and gaming activities took place.

- **Participant effects**, specifically, the extent to which observed participants alter a naturally occurring event, leading to biased outcomes. This is often called the Hawthorne effect, whereby the people being observed, either consciously or unconsciously, change what is being measured in the observation because they are aware of the observer. For example, an ethnographer conducting an overt, on-site passive observation of teaching practices in a school district would come away with misleading data if one or more school teachers deviated from their usual teaching styles during the observations in order to more closely conform with district policies.

LeCompte, M. D., & Goetz, J. P. (1982). Ethnographic data collection in evaluation research. *Educational Evaluation and Policy Analysis*, *4*(3), 387–400.

Ethnography: Mitigating Observer Bias

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](#) (Roller & Lavrakas, 2015, pp. 207-212).

In qualitative research, the researcher – including the in-depth interviewer, focus group moderator, coder in content analysis, and observer – *is* the instrument, meaning that the qualitative researcher wields substantial control in the design content, the gathering of data, the outcomes, and interpretation of the research. Ethnography is no different in that the observer – albeit not controlling participants' natural environment – plays a central role in creating the data for the study by way of recording observations. In this respect, the credibility of an ethnographic study essentially rests on the observer's ability to identify and record the relevant observations.

The necessary observer skills have been discussed elsewhere in *Research Design Review* – for example, ["The Importance of Analytical Sensibilities to Observation in Ethnography."](#) Without these skills, an observer has the potential for biasing the data which in turn will negatively impact the analysis, interpretation, transferability, and ultimate usefulness of an ethnographic study. The potential for bias exists regardless of [observer role](#). An offsite, non-participant observer may knowingly or not impose subjective values on an observed event – e.g., ignoring certain comments the observer finds personally offensive in a study of an online forum discussing alcohol use – while an onsite observer, operating either overtly or covertly, may bias results by way of personal characteristics (such as age or racial identity) and/or inappropriate behavior (such as personal commentary during the observed event).

The effects of possible observer bias should be anticipated in the design of ethnographic research and can be mitigated by the integration of many quality features, including those having to do with the implementation of the [observation guide and observation grid](#). Here are five quality features to mitigate observer bias specific to *who the observer is and how the observer thinks*:

- **Matching onsite observers with study participants.** Onsite observers should be "matched" to the study participants to the extent warranted by the study environment and objectives.

- **Observers must be trained to play the dual role of "insider" and "outsider."** Observers must learn to play a dual role as both "insider" – observing events from the participants' perspective – and "outsider" – observing events with an objective, value-free frame of mind. This is a critical skill and, if the observer was to learn only one thing in training, this is the skill to focus on. A dual perspective bolsters the credibility of the data by fostering honest accounts of the observed events by way of internalizing participants' meaning while at the same time minimizing the possibility of observer bias by casting an objective, non-judgmental eye.

- **Continually monitor observers' objectivity.** Objectivity is paramount in all research but particularly in ethnography when the researcher/observer may spend extraordinary amount of time in the field and, depending on the observer role, operate among the participants. For this reason, an ethnographic study needs to be continually monitored and controlled for the possibility of observers' inappropriate value judgments and other groundless interjections in the data.

- **Adequate training in "acting" skills.** Onsite participant observation requires a certain amount of "acting" from the observers. The ability to step outside oneself to take on and maintain a different persona while "in character" as a participant in ethnographic observations is an important skill. The abilities to "blend in" and "not make waves" help minimize observers' effects on the behaviors and events they are observing. In this way, observers are less likely to bias (i.e., change in a distorting way) what they are trying to objectively observe.

  An observer's acting skills are particularly important in covert participant observations where the observer is concealing his or her identity to the participants. Covert participation also requires an observer who is comfortable with the idea of deception. For many people, covert

observation may cause tension which may manifest itself in ways that will cause the observer to behave awkwardly (including a compulsion to confess the observer's true identity), distorting the behaviors and other aspects of the observed event. To minimize observer bias in these situations, the researcher must select observers who are completely accepting of the covert role while engaging with participants so as to not negatively affect the credibility of the data they gather for their study.

- **Observers must engage in constant self-evaluation.** It is the responsibility of the observer to engage in constant and detailed *self-evaluation*, such as maintaining a reflexive journal, about how the observer may have changed the outcomes being observed. This becomes a critical tool in formulating (and tempering) one's conclusions about the study and thereby enhancing the credibility of the study through disclosure of this self-critique process.

Image captured from: http://blog.aarp.org/2014/01/27/are-you-in-the-hospital-or-not/

Facilitating Reflexivity in Observational Research: The Observation Guide & Grid

Observational research is "successful" to the extent that it satisfies the research objectives by capturing relevant events and participants along with the constructs of interest. Fortunately, there are two tools – the observation guide and the observation grid – that serve to keep the observer on track towards these objectives and generally facilitate the ethnographic data gathering process.

Not unlike the outlines interviewers and moderators use to help steer the course of their in-depth interviews and group discussions, the **observation guide** serves two important purposes: 1) It reminds the observer of the key points of observation as well as the topics of interest associated with each, and 2) It acts as the impetus for a reflexive exercise in which the observer can reflect on his/her own relationship and contribution to the observed at any moment in time (e.g., how the observer was affected by the observations). An observation guide is an important tool regardless of the observer's role. For each of the five observer roles[*] – nonparticipant (off-site or on-site) and participant (passive, participant-observer, or complete) observation – the observation guide helps to maintain the observer's focus while also giving the observer leeway to reflect on the particular context associated with each site.

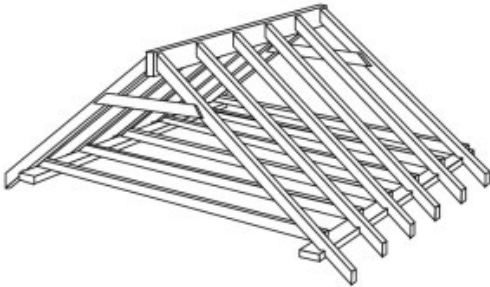| Observation Grid: Train Travelers Example			
Site location:	Date:	Start time:	Stop time:
	Research Issue		
Area of Observation	Waiting	Delays	Boarding
Behavior (what, by whom, where)			
Conversation (what, by whom, where)			
Context (What else is going on? What is the weather? Is it a holiday?)			
Type of traveler (alone, families, business companions)			
General mood (what, how conveyed, by whom)			
Other areas of observation:			
Reflexive comments:			

Adapted from Roller & Lavrakas, 2015. *Applied Qualitative Research Design: A Total Quality Framework Approach.* New York: Guilford Press.

As an adjunct to the observation guide, it is recommended that ethnographic researchers also utilize an **observation grid**. The grid is similar to the guide in that it helps remind the observer of the events and issues of most import; however, unlike the guide, the observation grid is a spreadsheet or log of sorts that enables the observer to actually record (and record their own reflections of) observable events in relationship to the constructs of interest. The grid might show, for instance, the relevant constructs or research issues as column headings and the specific foci of observation as rows. In an observational study of train travel, for example, the three key research issues related to activity at the train station might be: waiting for departures, delays in departures, and boarding; and the key areas of observation would pertain to behavior, conversations heard, and contextual information such as the weather and the general mood. Like the guide, the observation grid not only ensures that the principal issues and components are captured but also encourages the observer to reflect on each aspect of their observations and identify the particular ways the observer is influencing (or is being influenced by) the recorded observations.

[*]Roller & Lavrakas, 2015. *Applied Qualitative Research Design: A Total Quality Framework Approach*. New York: Guilford Press.

Supporting Observational Research

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](#) (Roller & Lavrakas, 2015, pp. 217-219) which is a qualitative methods text covering in-depth interviews, focus group discussions, ethnography, qualitative content analysis, case study, and narrative research.

An important element in the [Total Quality Framework Analyzability component](#) is Verification, i.e., taking steps to establish some level of support for the data gathered in order to move the researcher closer to achieving high quality outcomes. The verification tools at the ethnographer's disposal go beyond [those identified for the in-depth interview (IDI) and group discussion methods](#) in that they include the technique of expanded observation. For example, Lincoln and Guba (1985) stated that it is "more likely that credible findings and interpretations" will come from ethnographic data with "prolonged engagement" in the field and "persistent observation" (p. 301). The former refers to spending adequate time at an observation site to experience the breadth of stimuli and activities relevant to the research, and the purpose of the latter (i.e., persistent observation) is "to identify those characteristics and elements in the situation that are most relevant to the problem or issue" (p. 304)—that is, to provide a depth of understanding of the "salient factors." Both prolonged engagement and persistent observation speak to the idea of expanding observation in terms of time as well as diligence in exploring variables as they emerge in the observation. Although expanding observations in this way may be unrealistic due to the realities of deadlines and research funding, it is an important verification approach unique to ethnography. When practicable, it is recommended that researchers maximize the time allotted for observation and train observers to look for the unexpected or examine more closely seemingly minor occurrences or variables that may ultimately support (or contradict) the observer's dominant understanding.

The ultimate usefulness of expanded observation is not unlike deviant or negative case analysis (see earlier link). In both instances, the goal is to identify and investigate observational events (or particular variables in these events) that defy explanation or otherwise contradict the general patterns or themes that appear to be emerging from the data. For example, a researcher conducting in-home

[nonparticipant observations](#) of young mothers may find that infants are typically put back in the crib when they begin to cry, which seems to be a routine behavior among the mothers observed. The observer may come to the assumption that mothers equate crying with fatigue and place their infants in the crib so they can rest. But observations of mothers who do not respond to their crying infants yet put them to bed at similar times of the day may give the observer a different point of view and lead her to explore other factors, such as, the mother's fatigue and need to be away from the baby. It is this ability to always question assumptions and look for factors that disprove these assumptions that enhance the quality and ultimate usefulness of ethnographic research.

As in all qualitative research, triangulation is an important procedure for investigating support of observational data. The purpose of triangulation, similar to deviant case analysis, is to integrate other ways of looking at the data into the analysis. One example is researcher triangulation, which might include collaborating with other members of the research team in the data collection and processing phases, or asking someone on the research team to review transcripts or the observer's reflexive journal to give her/his own assessment. As with deviant case analysis, any differences that may surface between the researcher's and the colleague's interpretations should be treated as an opportunity to learn more about the underlying meanings from the observations.

Another triangulation-like consideration is offered by Dicks, Soyinka, and Coffey (2006), who discuss the variation of meanings in ethnographic research derived from different media. The idea is that the meaning of an observed event is transformed by the different modes of capturing the data. So, for instance, the researcher needs to consider what meaning in the data is lost or gained by listening to the spoken word in an audio recording compared to reading the written word in text. This "media triangulation" becomes particularly complex in an online context, where hyperlinking makes it nearly impossible to decipher the participant's experience. For example, as Dicks et al. state, "How does a piece of video film change when linked to a piece of written text? And what kind of reading or interpretation is produced by that linkage when the reader can pursue an almost infinite number of traversals and linkages of his/her own?" (p. 94).

Dicks, B., Soyinka, B., & Coffey, A. (2006). Multimodal ethnography. *Qualitative Research*, *6*(1), 77–96. https://doi.org/10.1177/1468794106058876

Lincoln, Y. S., & Guba, E. G. (1985). *Naturalistic inquiry*. Beverly Hills, CA: Sage Publications.

Image captured from: https://seblog.strongtie.com/2018/06/roof-framing-building-strong-roofs/

The Importance of Analytical Sensibilities to Observation in Ethnography

Ethnography is a multi-method approach in qualitative research with observation at its core. Prolonged onsite observations in the participants' natural material world are what make ethnography a unique and important research approach. Needless to say, the observer plays a central role in the success of an ethnographic study and there are few more important skills for the observer than those associated with the concept of analytical sensibility. It is the observer's skills in sensibilities that can compensate for weaknesses in other aspects of the study design, such as the unavoidable pairing of an older male observer with a group of school-age girls. The observer's analytical sensibilities include the capacity to be aware of and to reflect on his or her surroundings, the actions of the participants, and how the observer may be influencing the outcomes from the observation. This sensibility is analytical in nature because the focus is on the observer's ability to apply analytical skills while in the field that deepen the researcher's understanding of the culture and events from the participants' point of view.

The facet of sensibility that is imperative among all ethnographic observers is, what Stacey and Eckert called, "dual perspective" or the ability to derive meaning from participants' activities (as well as the study environment) by internalizing the viewpoint of the research participants while maintaining an "outsider's" objectivity. In this way, the observer is mentally placing him or herself among the participants while at the same time looking out to the connections that give meaning to the group. A dual perspective demands that observers have the ability to actually put themselves into the "shoes" of unfamiliar cultures and social groups, sensing and recording events from the participants' vantage point while also reflecting on its meaning as well as the observer's own values and possible biases. This ability distinguishes the untrained observer from the ethnographer.

The observer's job is made particularly difficult because a dual way of thinking is only one of the analytical sensibilities required from an ethnographic observer. An observer's sensibility skills also include the ability to:

- Notice and record participants' body movements (e.g., posture, gestures, eye contact), language and word choices, seating or standing positions, relative interaction with others, as well as the physical setting (including a map of the physical space and the participants positions within it).

- Gain participants trust by managing assumptions and expectations (e.g., patients in a drug detox facility might alter their behavior under the assumption that the observer is an undercover agent, or students-in-training may believe that the observer is there to offer expert advice rather than just observe).

- Focus attention on what is happening *now* in the study environment rather than trying to anticipate what will happen next. That is, being in the moment.

- Reflect back on observations during the field period, construct hypotheses or begin to identify patterns, and investigate nascent theories with participants by way of IDIs and/or activities.

- Maintain naivety when immersed in the role of a complete participant (e.g., an observer who is an experienced seaman needs to make a conscious effort to consider what he or she knows about the subject matter when studying the daily lives of fishermen, and continually reflect on the degree to which this know-how may be biasing the observer's ability to conduct the observation from the participants' point of view).

To simply observe a social group, an individual, an act, or an event (on- or off-line) is not research. Observation requires the analytical sensibilities of a trained ethnographer who can bring back from the field credible, analyzable, and ultimately useful data that takes the researcher to the next step.

Ethnography: A Case Study in a Quality Approach

As discussed elsewhere in *Research Design Review*, the Total Quality Framework (TQF) is "a useful tool for qualitative researchers to apply in designing, conducting, and interpreting their research so that the studies are more likely to (a) gather high-quality data, (b) lead to more robust and valid interpretations of the data, and (c) ultimately generate highly useful outcomes." The basic research principles that underlie the TQF can be applied to various qualitative methods.

The following is an excerpt from *Applied Qualitative Research Design: A Total Quality Framework Approach* (pp. 227-229) which summarizes an ethnographic study conducted by Todd (2012) concerning religious network organizations and their association with social justice at the local community level. This case study exemplifies many of the principles supported by the TQF approach — illustrated by the clearly stated purpose, the stated justification for the chosen method, and the attention to quality-enhancing details throughout the study.

Purpose

Religious networking organizations are structured groups consisting of people from multiple religious congregations that meet regularly to discuss common interests. The primary purpose of this study was to examine how and why these organizations work for social justice in their local community and how religion is integrated into the organizations' work in social justice.

Method

An ethnographic approach was considered appropriate because of the distinctive insight it could give into the organization members' personal experiences, as well as the proven benefit of ethnography, by other researchers in community psychology, in identifying and understanding the storied lives of individuals and social processes within community-based environments.

Design

Credibility *(Data Collection)*

<u>*Scope*</u>

Two networking organizations were included in this study. Both organizations are located in the same Midwestern community. The researcher became aware of, and was introduced to, these organizations by way of contacts (gatekeepers) within the community. The researcher assumed the role of an overt participant observer, attending monthly 2-hour meetings at both organizations for approximately 1½ years. The ethnographer's involvement with the organizations ended (i.e., his observational study concluded) when common patterns or themes in the data reappeared and no new observations were witnessed (i.e., when the researcher believed he had reached the point of saturation), and the researcher felt that he was clear on the knowledge he had gained on the constructs of interest.

The researcher discussed his research and interest in conducting participant observation with key informants (organizations' leaders and group members). He received approval from both organizations as well as from the university IRB. In lieu of written informed consent, the researcher obtained passive assent by reading a short script at the beginning of each network organization meeting. This script stated the researcher's university affiliation; his role as an ethnographer (specifically, participant observer); his intent to take field notes and write one or more academic papers at the conclusion of the study; and his contact information with instructions to notify him or a key informant (an organization leader) if any member did not want notes taken of his/her activity. The researcher took the added ethical precaution to brief any member who arrived at the meeting after his script was read and omitted the member from the field notes if his/her assent was not obtained.

<u>*Data Gathering*</u>

Observations at each meeting were directed by an observation guide that focused on the core construct of interest—how networking organizations understood and worked for social justice in the community—along with the topics/issues discussed, manner in which decisions were made, interaction among members, key events or incidents during the meeting, variations or deviant patterns, manner in which members attached meaning to their own behavior, sensory cues such as sights and sounds, physical layout of the meeting room (mapping), members' language during discourse, use of anecdotes and quotes, and the researcher's personal, reflective reactions or thoughts.

The ethnographer was mindful of the potential for [observer bias](#). One concern was the brevity of the script he read at the start of each meeting, which was purposely kept short so as to not disrupt the meeting. Still, the researcher questioned whether it was sufficient to explain his role and intentions (however, there was no indication from the members that this was a problem). The researcher was careful to refrain from interjecting questions or statements into the meeting that would only serve his research purpose. He was also careful to limit his involvement during the group meetings. In his report, the ethnographer (someone with a graduate degree in theology as well as psychology) acknowledged that his own assumptions prior to involvement with the organizations were potentially biasing his analysis, and, with this awareness, he continually reflected on his interpretations of the data.

Analyzability *(Analysis)*

Processing

The ethnographer reflected on the field notes throughout the study, and his personal reflections were integrated with the field notes. By continually reviewing and assessing these notes, the researcher used this information and insights to better understand future meetings where past observations were either affirmed or denied. This iterative, grounded analytical approach became a form of "focused coding" that identified key concepts and categories that were confirmed, or not, by additional observations. During analysis, the field notes were reread many times and organized by themes, patterns, processes, group activities, and around the key construct: how and why these organizations understood and worked for social justice in the community.

Verification

In addition to the observations, the researcher triangulated his data during analysis with the meetings' agendas, handouts, announcements, and minutes. Other triangulation techniques included deviant case analysis (e.g., looking for and exploring observations, relationships, or categories that were contradictory) and member checking by debriefing members after the initial observations and presenting a report to each organization after the analysis and interpretation, asking for member feedback on the findings.

Transparency *(Reporting)*

As shown in this brief account, the ethnographer provided a detailed report of the research covering the scope, data-gathering, and analysis processes. Importantly,

the researcher was very forthright and specific on particular issues regarding the construct of interest, participant consent, his own prejudices and the potential for bias, and the limitations of the study (e.g., the differences between the organizations). By way of the researcher's documentation, the reader is able to understand (a) how the research was conducted, (b) the obstacles or issues that may have impacted the data, (c) the process the researcher went through to reach the final interpretations, and (d) how the research might be applied in similar contexts.

Usefulness *(Doing something of value with the outcomes)*

The findings from this ethnographic study broadened the existing research on religious organizations and introduced a new religious setting—the religious networking organization—as an important entity in the shaping of positive behavior and attitudes. In particular, this research contributed to the literature the idea that these organizations work for social justice in the community and create social capital. This research called on community psychologists to partner with religious networking organizations to better their local communities and "create a more just and equitable society" (p. 243).

Todd, N. R. (2012). Religious networking organizations and social justice: An ethnographic case study. *American Journal of Community Psychology*, *50*(1–2), 229–245.
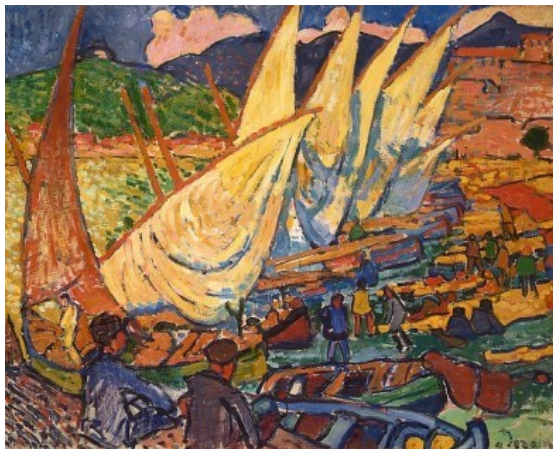
Image captured from: https://nccj.org/resources/social-justice-definitions

The "Real Ethnography" of Michael Agar

Several years ago, when working on *Applied Qualitative Research Design*, I began reading the works of Michael Agar. To simply say that Agar was an anthropologist would be cutting him short; and, indeed, Anthropology News, in an article published shortly after Agar's death in May 2017, described him as

"a linguistic anthropologist, a cultural anthropologist, almost an South Asianist, a drug expert, a medical anthropologist, an applied anthropologist, a practicing anthropologist, a public anthropologist, a professional anthropologist, a professional stranger, a theoretical anthropologist, an academic anthropologist, an independent consultant, a cross cultural consultant, a computer modeler, an agent-based modeler, a complexity theorist, an environmentalist, a water expert, a teacher…"

One doesn't need to look far to be enlightened as well as entertained by Mike Agar – On the "Scribblings" page of his Ethknoworks website, he lightheartedly rants about the little money most authors make in royalties stating "If you divide money earned by time invested in writing and publishing, you'll see that you'd do better with a paper route in Antarctica." It may be this combined ability to enlighten and entertain that drew me to Agar and keeps me ever mindful of the words he has written and the ideas he instilled.

For some reason I come back to his 2006 article "An Ethnography By Any Other Name…". In it, Agar explores the question "What is a *real* ethnography?" with discussions of debates ("tension") between anthropologists and sociologists, and about various nuances such as whether applied anthropology is actually "real" given that "ethnography no longer meant a year or more by yourself in a village far from home" (Agar, 2006, p. 4), where ethnographers' focus should be (the community or a particular problem), and geographical (Agar was deemed a "South Asianist") and institutional labels. These debates have sparked many questions including "Is educational ethnography *really* ethnography?" (Agar, 2006, p.3) as well as the provocative, Is ethnography really "qualitative research"? These days, Agar might also wonder about modern-day "in-home ethnographies" and "video ethnography," asking What are these approaches really, and can we really call them "ethnography"?

Of particular interest in this 2006 article is Agar's discussion of what he considers "acceptable and unacceptable ethnography," and specifically his focus on abductive logic along with meaning and context. The emphasis here is on the idea that any ethnography "has to produce new concepts" untethered from earlier or existing theories and instead emerging from the researcher's embrace of "surprises" in the data and an eagerness to pursue them. This willingness to pursue revolutionary observations in the data also supports the added notion of "iterative abduction" which speaks to a flexible approach to ethnography, e.g., altering the interview guide as warranted after each set of two or three interviews. Flexibility is an important attribute to qualitative research and is actually one of 10 unique attributes discussed in an earlier article in *Research Design Review*.

But acceptable ethnography, according to Agar, goes beyond abductive logic to include meaning and context. Importantly, Agar is referring to the meaning and context which is derived from absorbing a different point of view while in pursuit of surprising concepts. In doing so, the ethnographer is not looking for or analyzing "variables" within an observed event but rather "patterns" of behavior or activities. Like flexibility, meaning and context are two of the 10 unique attributes associated with qualitative research as discussed in the *RDR* article mentioned earlier. Going one step further, I would suggest that meaning, context, *as well as the participant-researcher relationship* are the three unique attributes of qualitative research that underscore and serve to define the remaining seven attributes.

An article posted in *RDR* in 2014 concerns the very topic of contextual meaning in ethnography – see "Observational Research Nurtures a Growing Interest in Contexts." This article talks briefly about sensory ethnography, quoting Dawnel Volzke

"I find that I am much more able to 'do sensory ethnography' when I slow down and take the time to properly assess people and situations. My bias and assumptions need to be set aside, and I must seek to truly sense the truth about the object that I am studying. My view must be both broad and detailed, and my account to others must embody the truest picture possible."

As in all qualitative research, the research skills of most import in the ethnographic approach are those of patience, reflection, the ability to set aside assumptions and beliefs while also embracing the meaning and context of our participants in order to come as close as we are capable to their reality.
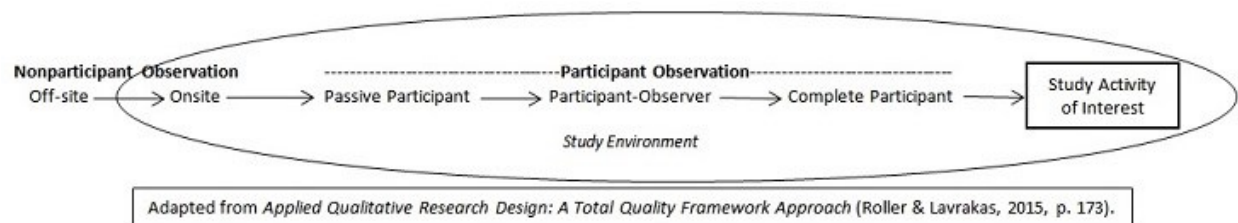
Thank you, Michael Agar.

Agar, M. (2006). An ethnography by any other name…. *Forum Qualitative Sozialforschung / Forum: Qualitative Social Research*, *7*(4), 1–24.

The Five Observer Roles in Ethnography

There are many variations of observational research, both off-and online, but central to the ethnographic approach is the role of the observer. This role has to do with both the *physical* as well as the *psychological* or emotional distance between the observer and the observed, and can range from remote off-site observation to complete immersion and participation in the study activities.

Broadly speaking, the observer is conducting either nonparticipant or participant observation. In nonparticipant observation, the observer may be either off- or onsite; and, in participant observation, the observer may be passive, a participant-observer, or a complete participant. Importantly, the observer may switch roles in the course of a study, e.g., moving from an on-site nonparticipant observer to a passive observer, then a participant-observer, and then a complete participant. These five observer roles are depicted below.

Adapted from *Applied Qualitative Research Design: A Total Quality Framework Approach* (Roller & Lavrakas, 2015, p. 173).

Nonparticipant Observation

As a nonparticipant, the observer is observing in an unobtrusive manner either remotely (off-site) or within the study environment (onsite). An **off-site nonparticipant** observation might be the study of an online community or forum without any involvement (participation) by the observer, or the observation of teaching methods via remote monitors located in a separate building.

Onsite nonparticipant observation moves the observer into the study environment and closer to the activity of interest; however, like off-site observation, the onsite nonparticipant observer is not engaging with participants. An example of this role is the work of Griffiths (2011) who worked as a change attendant at an amusement arcade in order to observe gambling behavior, and Lyall and Bartlett (2010) who observed how psychiatrists made decisions regarding patient leave by unobtrusively accompanying them on their ward rounds.

Participant Observation

In each of the three participant observation roles, the observer is located within the study environment and engaged with the participants at some level beyond mere

observation. A **passive participant** observer, for example, conducting an ethnographic study of teamwork among soccer players on the field, might use breaks in the game to ask players questions regarding their experiences or help distribute water and towels after the game.

A **participant-observer** is more engaged with participants than in the passive role. For instance, in the soccer study mentioned earlier, the participant-observer might actually go on the field with the soccer players to hear what is discussed in the huddle.

The fifth and most involved observer role is the **complete participant**. In this role, the observer is fully engaged with participants. So, in the soccer study, the observer might join the team (assuming he/she has the necessary qualifications) and be involved in the team activities on and off the field. Schouten and McAlexander (1995) provide an example of the complete participant role in the study they conducted with owners of Harley-Davidson motorcycles to understand the biker subculture. They began their observations as onsite nonparticipant observers but shifted to participant-observers and then to complete participant observers when they decided that a fully engaged role would give them "an empathetic sense of a biker's identity, psyche, and social interactions in the context of everyday life" (p.46).

The observer role or roles in an ethnographic study should be carefully determined and discussed during the design, analysis, and reporting phases of the research. Along with the particular role of the observer, the design, analysis, and reporting should give deliberate thought to the observer's status; specifically, whether the observation will be overt or covert. This is an important factor in observational research that cannot be taken lightly for many reasons, not the least of which is the associated ethical considerations (which are discussed in this *RDR* article).

Griffiths, M. D. (2011). A typology of UK slot machine gamblers: A longitudinal observational and interview study. *International Journal of Mental Health and Addiction*, *9*(6), 606–626. http://doi.org/10.1007/s11469-010-9291-4

Lyall, M., & Bartlett, A. (2010). Decision making in medium security: Can he have leave? *Journal of Forensic Psychiatry & Psychology*, *21*(6), 887–901. http://doi.org/10.1080/14789949.2010.500740

Schouten, J. W., & McAlexander, J. H. (1995). Subcultures of consumption: An ethnography of the new bikers. *Journal of Consumer Research*, *22*, 43–61.

To Deceive…or Not?

Ethical considerations play an important role in the research we do. Of all researchers, however, the ethnographer may be the most likely to face difficult ethical considerations and decisions that directly impact study design. One reason is that covert observation has not been an uncommon design feature in ethnographic research, leaving these researchers with the secrecy of deception.

There are many well-documented covert ethnographic studies, some of which became highly controversial for their use of deceptive tactics. Carolyn Ellis (1986), for example, conducted a nine-year observation of a Guinea (traditional watermen) community in the tidewater region of Virginia whose townspeople befriended her unaware that the sole purpose of her visits was to further her research endeavor. She quickly became a "traitor" when her prize-winning book on the research went public.

Deviant and subculture groups have also been the target of covert ethnographies. Humphreys' (1970) classic study on male homosexual bathroom trysts involved the researcher serving as a watchdog for quick sexual liaisons in public bathrooms between male strangers. The researcher obtained the names and addresses of these men by using public records to look up their automobile license plate numbers. One year later, he visited these men, pretended to be conducting survey research on mental health and, in so doing, conducted 50 interviews that appeared to have nothing to do with the men's earlier bathroom-sex activities.   Despite generating interesting findings, this study was extremely controversial in terms of its ethics and, among other things, contributed to the elimination of the sociology department at Washington University (where Humphreys had received his doctorate degree).

Other covert ethnographies involving deviant groups include the work of: Adler (1990) who justified her and her husband's covert passive participation in a study investigating drug trafficking by the "illegal nature of the activity and the degree of suspiciousness" they witnessed among the participants (i.e., the drug dealers), as well as the "necessity for maintaining relationships with our key informants"; Tewksbury (2002) who used covert observation to investigate the "social and sexual dynamics" of two gay bathhouses as a complete participant (i.e., as a real

member of the bathhouses), justifying the covert strategy based on earlier work in this area; Andriotis (2010) who studied a gay nude beach in the context of an "erotic oasis" as an onsite non-participant observer; and Griffiths (2011) who justified his covert onsite non-participant observation of gambling behavior based on the fact that the research sites were public venues.

Like the practice of ethnography itself, researchers and those that consume ethnographic research findings do not necessarily agree on whether or not deception is acceptable and about the need (some would say "obligation") to debrief the observed participants who have been deceived by covert researchers. The American Anthropological Association (AAA) states* that researchers "who otherwise engage in clandestine or secretive research that manipulates or deceives research participants…do not satisfy ethical requirements for openness, honesty, transparency and fully informed consent" (American Anthropological Association, 2012). Most researchers, however, do believe that there should not be an outright ban on covert observation. Even the AAA allows* that informed consent may "be obtained retroactively if so warranted by the research context, process, and relations" (American Anthropological Association, 2012). Further, the "Use of Deception in Research" clause in the *Code of Ethics* from the American Sociological Association states* that there are a number of conditions under which "deceptive techniques" are permissible (American Sociological Association, 1999). And similarly, the American Psychological Association acknowledges in their *Ethical Principles of Psychologists and Code of Conduct* that there are valuable research studies that could not be conducted without the use of deception (American Psychological Association, 2010).

Some have justified covert observation when studying "powerful and elite" groups (e.g., politicians, corporate executives) who would otherwise be difficult to access due to gatekeepers or who may only agree to participate if allowed to review and edit the researcher's field notes. Whatever the reason, researchers generally believe that some form of covert observation may be necessary to gain unbiased data and, indeed, much of the ethnographic research conducted on the Internet is covert in nature.

The question of deception is all around us. But it is the ethnographer who most often lives and breathes in the shadows of covert research; regardless of whether the observation is off- or onsite, face-to-face or remote, or the observer participates in the study activity or not.

* Note: This article was written in 2013.

Adler, P. (1990). Ethnographic research on hidden populations: Penetrating the drug world. In E. Y. Lambert (Ed.), *The collection and interpretation of data from hidden populations* (pp. 96–112). U.S. Department of Health and Human Services, National Institute on Drug Abuse.

American Anthropological Association. (2012). *Statement on ethics: Principles of professional responsibility*. Arlington, VA. Retrieved from http://www.aaanet.org/profdev/ethics/upload/Statement-on-Ethics-Principles-of-Professional-Responsibility.pdf

American Psychological Association. (2010). *Ethical principles of psychologists and code of conduct* (Vol. 57).

American Sociological Association. (1999). *Code of ethics and policies and procedures of the ASA Committee on Professional Ethics* (Vol. 119). doi:10.1111/j.1559-3584.2007.ethics.x

Andriotis, K. (2010). Heterotopic erotic oases. *Annals of Tourism Research*, *37*(4), 1076–1096. doi:10.1016/j.annals.2010.04.003

Ellis, C. S. (1986). *Fisher folk: Two communities on Chesapeake Bay*. Lexington, KY: The University Press of Kentucky.

Griffiths, M. D. (2011). A typology of UK slot machine gamblers: A longitudinal observational and interview study. *International Journal of Mental Health and Addiction*, *9*(6), 606–626. doi:10.1007/s11469-010-9291-4

Humphreys, L. (1970). *Tearoom trade: Impersonal sex in public places*. Chicago, IL: Aldine.

Tewksbury, R. (2002). Bathhouse intercourse: Structural and behavioral aspects of an erotic oasis. *Deviant Behavior: An Interdisciplinary Journal*, *23*(1), 75–112.

Ethnography: Number of Observations

The following is a modified excerpt from [Applied Qualitative Research Design: A Total Quality Framework Approach](Roller & Lavrakas, 2015, pp. 199-201), a qualitative methods text covering in-depth interviews, focus group discussions, ethnography, qualitative content analysis, case study, and narrative research.

An important decision that ethnographic researchers need to make is the number of observations to conduct, or, more accurately, the number of:

- Sites to observe.
- People within sites to observe.
- Observational events (e.g., how often to revisit a particular site).

Addressing this question can be complex—a process of both art and science—or fairly straightforward. In the simplest case, the **number of sites to observe** and observation events will be dictated by the (1) breadth and depth of the research objectives, (2) breadth and depth of the target population, and/or (3) practical realities of the research (e.g., the accessibility of the target participants, financial resources, and time available to complete the study). If, for example, the research objective is to examine the implementation of new procedures at a county free clinic, the number of sites to observe is just one (the clinic) and the frequency of observations will be determined by such factors as the fluctuation in the patient load (i.e., the slow- and high-volume hours in the clinic) and level of procedural details the observer wants to capture.

A more complex situation arises when the focus of the research is on a broad target population such as consumers. For instance, ethnographic research to study how consumers shop for vitamins would most likely require many observations of the same or different individuals within a variety of retail environments (e.g., supermarkets, drug stores, and superstores such as Target or Walmart). As a consumer researcher, Mariampolski (2006) recommends that the ethnographer observe no less than 15 sites; however, it is the expansiveness of the research objectives and target population, as well as practical matters, that may ultimately serve as the prime bases in the decision of how many sites to observe and how often.

In addition to the number of sites to observe, the ethnographer also wants to carefully consider **how many individuals as well as the "type" of individuals**

who will be observed. As an example, is the observer interested in studying everyone on staff at the county free clinic (e.g., the receptionist, the nursing assistants, the nurses, and the physicians), or are the new procedures under investigation only pertinent to one aspect of the clinic, such as patient registration and check-in?

For all ethnographic research, the overriding "goal is to get at the meanings behind the acts" (Berg & Lune, 2012, p. 197) as they relate to the constructs under investigation. Not unlike the decision of how many in-depth interviews are sufficient for a research study, an ethnographic researcher must consider the **number of observations** (site and individual) at both the design and fieldwork phase. Ultimately, the researcher wants "enough" observations to be confident that the range of variation in what is being studied has been captured by the observations; however, the number that is anticipated when developing the research design may need to be adjusted when in the field. If there is more variation than expected, the researcher will need to extend the number of observations; otherwise, the lack of additional observations may threaten the Credibility of the study by missing something important in the behaviors of interest. A study concerning visitor attendance to the state park, for example, may need to expand the number of observations originally planned to include unexpected variations in behavior that occur during different weather conditions. In turn, if there proves to be less variation than expected—for instance, if park visitors behave very similarly regardless of weather, demographics, or other factors—the prudent researcher will want to make an explicit decision about terminating the field period sooner than had been planned. The caveat is that, although the researcher's confidence in the variations of behaviors being observed is important, the decision to either extend or cut short the observations may also boil down to the practical or logistical realities of the study itself (e.g., safety concerns for a researcher observing in a high-crime area of the city, travel plans that cannot reasonably be changed, other types of ancillary research such as in-depth interviews that are also being conducted for the study and whose timing cannot be changed, and meeting others' expectations to complete the research as planned).

Although there may not be an exact way to decide how many observations to conduct, a Total Quality Framework approach guides the researcher towards explicitly addressing a number of questions while in the field to assess this issue:
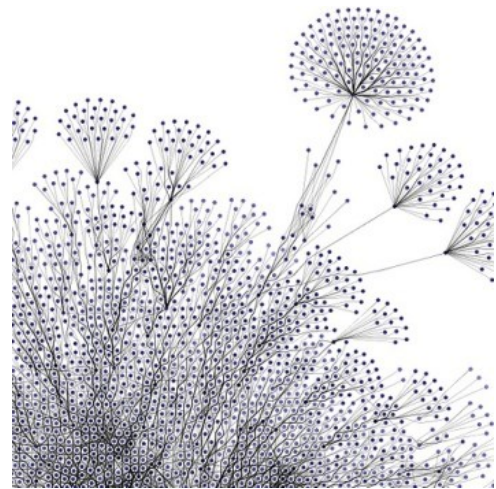
- How well have the observations provided insight on the constructs of interest?
- Is it clear to the observer what has been observed? What is the extent of the ambiguity?
- At what level can the observer explain or anticipate variations in the observations?
- Does the observer's reflexive journal reveal any biases or concerns with objectivity?
- Have the observations provided the necessary input to facilitate next steps (i.e., the ancillary methods such as in-depth interviews)?

Berg, B. L., & Lune, H. (2012). *Qualitative research methods for the social sciences* (8th ed.). Boston: Pearson.

Mariampolski, H. (2006). *Ethnography for marketers: A guide to consumer immersion*. Thousand Oaks, CA: Sage.

Observational Research Nurtures a Growing Interest in Contexts

With a lot of discussion about new methods of observation among qualitative researchers – in-the-moment mobile research and the like – it is terrific to witness an increasing appreciation of broader contexts. This perspective embraces the idea that individual behavior and thought are not so easily and singularly confined to any one moment in time. One could argue that it is *because* of this new-found obsession with observation that many researchers have come to discover – as if for the first time – the essential role that context plays in our qualitative studies. In this way, observational research – a method often bypassed for focus groups and other qualitative methods in the past – has led the research community into what is becoming a growing and healthy dialogue concerning the contextual nature of being human. Here are just four contributors to the dialogue that have recently come my attention:

An interview with Christian Madsbjerg at ReD Associates appears in the September 2014 issue of *Marketing News* – "What it Means to be Human" by Elisabeth A. Sullivan. In it, Madsbjerg asserts that "people are different from the way that we research them," emphasizing the point that "the respondent is not a person" but rather "an ecology of people, a culture of people" that includes friends, family, work life, and other facets of who they are. So, while he is a strong supporter of observing people's lives, Madsbjerg is equally interested in the totality of the "phenomenon" – the various contextual components – under study. This might lead, for example, to a technique he calls "breaching" whereby research participants agree to do without their smartphones so that researchers can look at how smartphone users adapt their everyday lives sans smartphone, which allows researchers to learn more deeply about the "hidden familiarity" of the smartphone-use cultural phenomenon.

If you are an ESOMAR member, you are probably familiar with the association's custom of granting a free download of a conference paper to members on their birthday. It was recently mine and I took the opportunity to download the 2012 paper, "Research in a World Without Questions" by Tom Ewing (BrainJuicer® now System1 Group) and Bob Pankauskas (Allstate Insurance, now at Brakethrough Research). As the title suggests, the authors stress the importance of

research methods that focus on what people *do* rather than "what they say they do"; however, the title is a bit misleading in that they are not really advocating for "a world without questions" but instead a world without *direct* questions to research participants (e.g., opting instead for psychoanalytic or projective techniques). Like Madsbjerg, Ewing and Pankauskas are interested in investigating the "hidden triggers" that lurk behind the purchase decision-making process, including the "interventions that change the context of the decisions." The authors go further to discuss how to investigate "near context" (e.g., in-the-moment environment) and "far context" (e.g., cultural and social influences) in ways that enable researchers to "get into your customer's world" without direct questioning.

Dawnel Volzke recently wrote a thoughtful article discussing sensory ethnography referencing Sarah Pink's book Doing Sensory Ethnography. Volzke uses her own work as a nurse to talk about the importance of techniques in the patient-nurse environment that go beyond observation and direct questions to amplify the patient's contextual meaning. Taking from Pink, Volzke states that "capturing and presenting sensory information in the most truthful and complete manner will aid in understanding of individuals, situations, and cultures." She touches on important concepts discussed throughout *Research Design Review*, particularly interviewer bias and the idea of reflexivity –

"I find that I am much more able to 'do sensory ethnography' when I slow down and take the time to properly assess people and situations. My bias and assumptions need to be set aside, and I must seek to truly sense the truth about the object that I am studying. My view must be both broad and detailed, and my account to others must embody the truest picture possible."

And finally, a recent blog post from Jeffrey Henning – "From Market Researcher to Customer Experience Leader**"** – reports on a case study presented at this month's Corporate Research Conference in Chicago by Neal Kreitman of OneMain Financial. Henning talks about how Kreitman went beyond satisfaction research data to gain insightful knowledge of the "optimal customer experience" by immersing the organization in qualitative research, including focus groups and observation. Similar to Madsbjerg's contextual "phenomenon," Kreitman and his team used inversion techniques to truly understand the customer's "journey" from the customer's, *not the company's*, point of view. In this way, OneMain was able to adopt a "customer-centric vision of what the [customer] experience actually was, rather than what the process was supposed to be."

Context is everything, we know that. And it is encouraging to think that the otherwise too-simplistic in-the-moment observational craze is leading researchers to think more carefully about incorporating contextual meaning – humanity – into their research designs.

Image captured from: http://www.icr.ac.uk/news-features/latest-features/mel-greaves-science-writer-of-the-year-2013/unravelling-the-complexity-of-cancer

25 Ingredients to "Thicken" Description & Enrich Transparency in Ethnography

Transparency plays a pivotal role in the final product of any research study. It is by revealing the study's intricacies and details in the final document that the ultimate consumers of the research gain the understanding they need to (a) fully comprehend the people, phenomena, and context under investigation; (b) assign value to the interpretations and recommendations; and/or (c) transfer some aspect of the study to other contexts. Transparency, and its importance to the research process, has been discussed often in this blog, with articles in November 2009 and December 2012 devoted to the topic.

At the core of transparency is the notion of "thick description." The use of the term here goes beyond its traditional meaning of

"describing and interpreting observed social action (or behavior) within its particular context…[along with] the thoughts and feelings of participants as well as the often complex web of relationships among them. Thick meaning of findings leads readers to a sense of verisimilitude, wherein they can cognitively and emotively 'place' themselves within the research context" (Ponterotto, 2006, p. 543).

to also include detailed information pertaining to data collection and analysis. Ethnography, for example, is greatly enriched ("thickened") by the reporting of specifics in 25 areas related to the:

1. Research objectives, hypotheses, constructs, and an explanation as to why ethnography was the best approach.
2. Target population.
3. Sampling, e.g., determining sample size and participant/site selection.
4. Individuals or groups that were observed and their representativeness of the target population.
5. Rationale for opting for a nonparticipant or participant observer role and the mode.
6. Rationale for the choice of overt or covert observation.
7. Observation sites.

(cont.)

8. Rationale for the number of scheduled observations.
9. Status of scheduled observations, e.g., how many and which of those scheduled were actually completed.
10. Ethical considerations.
11. Other methods (such as in-depth interviews) that were used to augment the observations.
12. Decisions that were made in the field that had the effect of altering the research objectives and/or aspects of the research design.
13. Observer training that took place to mitigate observer effects.
14. Role of gatekeepers and key informants.
15. Observers' reflexive journals.
16. Unanticipated events that took place during the observations, e.g., the revelation of a covert observer's identity.
17. Use of extended or expanded observations for verification purposes.
18. Verification efforts beyond expanded observations.
19. Operational logistics, e.g., recordings, mapping.
20. Transcription processes.
21. Coding procedures.
22. Thematic and pattern-building analytical processes.
23. Specific observed events and related evidence that exemplify the final interpretations of the data.
24. Particular steps that were taken for an online ethnography.
25. Members of the research team.

Ponterotto, J. G. (2006). Brief note on the origins, evolution, and meaning of the qualitative research concept "thick description." *The Qualitative Report*, *11*(3), 538–549.

Image captured from: http://pragyabhagat.blogspot.com/2010_11_01_archive.html

Reporting Ethnography: Storytelling & the Roles Participants Play

In Chapter 10 of Sam Ladner's book *Practical Ethnography: A Guide to Doing Ethnography in the Private Sector*, the author discusses a best practice approach to reporting ethnographic research for a corporate audience. She states that "private-sector ethnographic reports are successful if they are dramatic and consistent with the organization's truth regime" (p.165). To this end, Ladner recommends text reports with "clickable hyperlinks" throughout and supplemental material, such as a PowerPoint presentation, that acts as the "marketing campaign" or "movie trailer" for the text document.

As another "delightful element" to the ethnography report, Ladner suggests the use of personas or archetypes, each representing a depiction of participants that share a particular characteristic. This is "a useful way to summarize the voluminous amount of qualitative data" (p. 167); however, Ladner cautions that personas "are often done badly" and points to Steve Portigal's article on the subject matter, "Persona Non Grata." In it, Portigal advocates for maintaining the "realness" of research participants rather than manufacturing a "falsehood" (by way of personas) that distances the users of the research from the people they want to know most about. Portigal encourages researchers to engage with the "messiness of actual human beings," emphasizing that "people are too wonderfully complicated to be reduced to plastic toys [that is, personas]."

Reporting observational research for corporate users can be a challenge. On the one hand, the researcher is obligated to dig into the messiness of analysis and convey an honest accounting of what the researcher saw and heard. On the other hand, the final reporting is meaningless if no one pays attention to it, thereby preventing the research from having the desired effect of bringing new energy and a new way of thinking to the organization. Ladner and Portigal agree that powerful storytelling grounded in reality is the best approach, but how do we create a compelling drama while maintaining the integrity of our data? A combination of formats, as Ladner suggests, is one tactic. And the use of personas may be another. An open and ongoing discussion among researchers about personas – *if* and *how* the roles we assign the actors in our final story are (or can be) created while staying true to the study participants – seems like a worthwhile effort.

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