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QUALITATIVE ● Roundabout research

# Technology, indirect observation yield insights

By LAURA JOHNSON

Imagine what it would be like to *really know* your customers—what they think, what they do on a daily basis, how they feel, issues they face, what they need and what they associate with your products and services. We can get a sense by asking questions through traditional survey research, but neuropsychology tells us that the vast amount of the brain's activity is below the level of conscious recall. Respondents are often unable to reconstruct their behavior, so to truly understand their needs and motivations, we need to understand their experience in the moment it occurs.

So you may wonder what to do, "How can I be in the moment with my customers?" Traditional ethnography, or direct observational research, allows us to approximate that experience as closely as possible. But often there are barriers that make traditional ethnography impractical. It can be extremely costly, particularly if you are trying to observe spontaneous, infrequent or irregularly timed events or actions. And sometimes a product or service is not tangible, or a decision process is complex and multifaceted, invisible or not physically observable. Some behavior is personal and would be inappropriate or a

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breach of confidentiality to observe, or might be altered by having an observer present. In these circumstances, indirect observation—or what could be called practical ethnography—may be a suitable substitute.

Indirect observation allows us to apply the spirit of classical ethnography through the aid of technology. The ubiquity of technology allows us to gain a more firsthand yet unobtrusive view. Technology acts as a portal, or window, through which we can observe unseeable behavior when it happens, allowing us to gain a closer view of the contexts in which behavior occurs and providing insight into the customer's environment. While the specific approach taken depends upon whom and what is being observed, there are three basic phases in the indirect observation journey.

## Phase 1: Mapping the trip

In Phase 1, the ethnographer makes initial contact with participants through a Web or teleconference kickoff to begin the dialogue. The kickoff is followed by an introductory group discussion, the specific venue for which depends upon the audience and the topic (this may be at a bar, a restaurant, a focus-group facility or the like). This phase of the process builds rapport among participants as well as between ethnographer and participant,

creating a team exploration or field trip experience and fostering emotional and intellectual investment in the process.

Phase 1 entails a high-level exploration of customers' lives and behaviors, yielding some immediate initial insights and the beginning of a more in-depth understanding of experiences and perspectives. It can also serve as a vehicle for screening a subset of ideal respondents that will continue throughout all of the phases.

## Phase 2: The incredible journey

Indirect observation via technology windows occurs throughout Phase 2, during which participants record and capture feelings, emotions and experiences. The medium for recording can take many forms. While continuing advances in technology will broaden the options here, current forms may include electronic bulletin boards, blogs or various types of diaries. Participants are also encouraged to use immediacy pulses, whereby they convey their thoughts or emotions during or right after an experience—this, too, can take a number of forms, including e-mail, voice-mail or instant message. In addition, they are encouraged to collect artifacts from their environment and to use vehicles such as photojournalism, storytelling, collages and such to represent their perspectives on what they are experiencing. All of these mechanisms allow the participant (as well as the ethnographer) to learn

through reflection on the more emotional, less rational associations and patterns that emerge.

This phase provides detailed insight into the customer's everyday life and allows the ethnographer to tap into the most emotionally charged points of pain, moments of pride, areas of opportunity for the brand and other important developments.

**Phase 3: At journey's end—  
unpacking the trunk**

Phase 3 (also known as the "Aha!" phase) is the forum for discussing what's been observed in the field. It represents the culmination of collective insights and emotional linkages. Participants share their observations and insights gained over the course of the observation period. It is during this time that participants share their artifacts, collages and stories, as well as the exercises they have completed, and the ethnographer can probe areas of particular interest revealed in prior phases. The introspective nature of the process often generates additional insights as participants relate their expe-

rience.

Phase 3 may take a variety of forms, depending again on the nature of the participants and the subject matter. The discussion can be in a group or one on one, and may be over the phone, online or in-person. In-person venues are chosen for convenience and to facilitate sharing; they can be traditional focus group facility settings or alternative locations.

**Putting insights to work**

Ethnographic research offers an effective platform for aligning the organization with its customers, serving as the impetus for beginning a cycle of learning and action. Involving internal stakeholders along the way gives them an opportunity to share insights firsthand. Direct involvement can be a powerful experience and an excellent means of obtaining long-term buy-in and commitment to action.

The rich insights generated through ethnography often exceed the initial scope of the research and serve as excel-

lent fuel for brainstorming and ideation sessions as productive avenues for creating solutions and new-product and service ideas. By combining creativity, thoughtful consideration of the behavior and audience to be observed, and emerging technologies, organizations can adapt classical ethnography to make even invisible behaviors and decision-processes accessible through carefully applied indirect observation. The result is powerful insights about customers that go beyond knowing what they do and think to understanding the underlying why—the foundation for competitive advantage. ■

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