

market research bulletin

# SURVEY

Not One  
But TWO  
& Growing  
METRO DC

“Seizing the **Opportunities**  
& Overcoming the Challenges

MULTI-COUNTRY RESEARCH

## FYI

Are we going to take  
to the tablet?

Transformation through  
Learning How to Listen

ANGELA LORINCHAK, PRC  
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Metro Research Services, Inc.

ETHNOGRAPHY

# EMBRACING THE POWER OF ETHNOGRAPHY



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**MARKET STRATEGIES**  
INTERNATIONAL

Recently, ethnography has been enjoying a spotlight in the market research community as a new, resurgent innovative strategy. However, there seems to be some confusion about what ethnography is and what it isn't. I have heard ethnography used to describe everything from qualitative interviews to simple observations of store shoppers. These descriptions are only partial glimpses into what ethnography truly is.

## ETHNOGRAPHY IN A NUTSHELL

Ethnography is a research strategy that allows the researcher to understand a variety of personal and cultural behaviors through participant observation within the natural environment. Participation is a key component. The shared experience between researcher and participant is an extremely powerful moment that leads to even more powerful research insight.

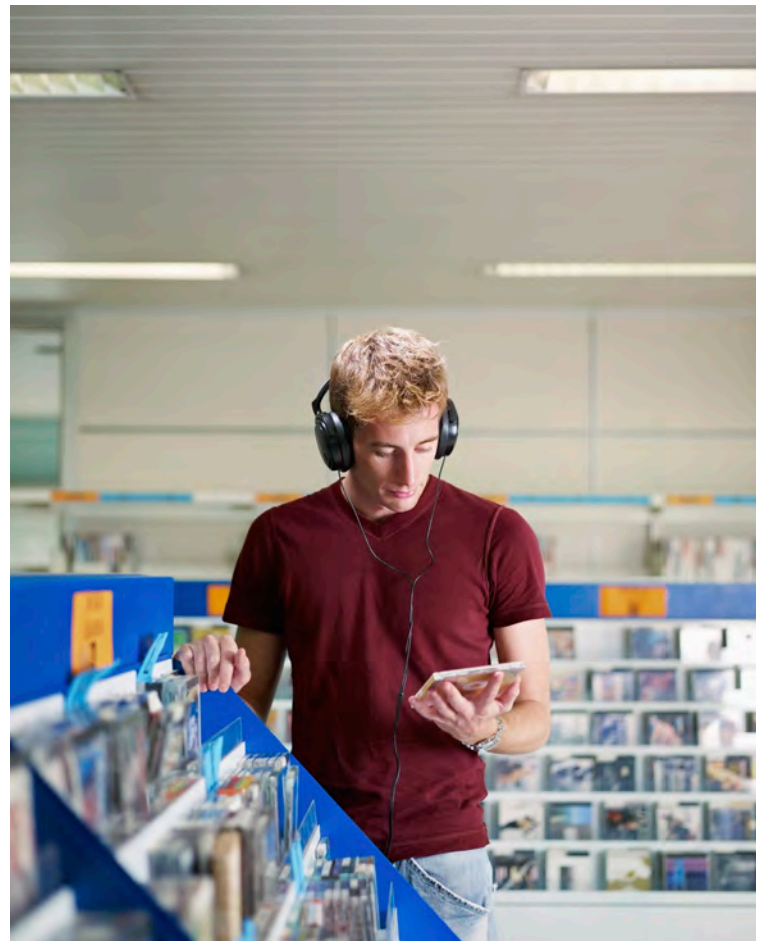
## NEW INNOVATIONS IN ETHNOGRAPHY

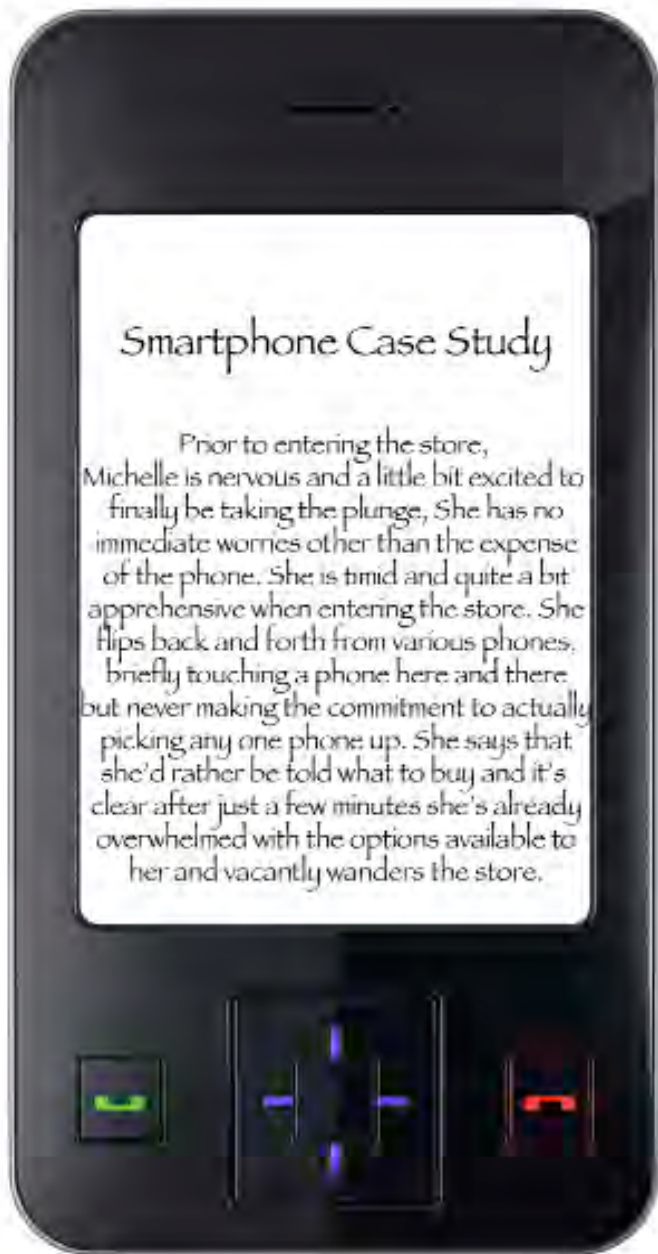
In today's fast-paced, changing, multi-faceted world of dispersed technological communication, market researchers must not only be highly technologically savvy but must also engage in new and innovative methods and strategies. Ethnography is no exception. While ethnography has remained largely the same strategy since its inception, current technology requires researchers to keep up. Reaching individuals tucked away in various locations is a challenge that technology can help solve. Ethnography used to require someone to be present at all times but the reality today is that this is not always possible. Today ethnographers must negotiate complex juxtapositions of locations and a tangle of connections, links and associations seen through a multitude of lenses as participants shift between different environments.

In order to accommodate this new technologically driven culture, market researchers and ethnographers alike must embrace new methods of interac-

tion that continue to capture the nuanced experience of the participant. Within ethnography this means delving into and combining a myriad of techniques and the use of various formats. Multi-media ethnography is a fantastic way to combine methods that keep the ethnographer connected during the period of a study.

Multi-media ethnography, or digitally layered ethnography, employs a variety of tools to capture participant behavior. This includes the use of participant recorded images, video uploads, conversations over VoIP, IM or phone, text messages (a low stress way of interaction) to alert the ethnographer to important events and thoughts, streaming videos in real time and the use of webcams to have conversations or to keep a constant record of activity in a particular area. Naturally, not all uses are appropriate and a combination along with some in-person participation is the best way to conduct a good ethnography. A nice tool at the disposal of the researcher is the Smartphone, as the Smartphone contains many different methods of continual interaction between researcher and participant.





In September, our company was challenged with understanding the user experience of new Smartphone entrants to the market place. What barriers did they face? What was the buying process like? What was the learning curve like for new Smartphone owners?

In order to carry out this study and get at the holistic process of the smartphone experience from pre-purchase to two weeks post purchase, ethnography was deemed the most appropriate method. However, given that this study would follow individuals from the planning to actual in-store purchase and continual experience and learning of the phone and its functions, it wasn't possible to be with them every moment they were interacting, talking about or using their phone. This project required innovative ethnographic methods that would allow the researcher and participant to stay in close contact without being in constant close proximity.

The study kicked off with the participants purchasing their new Smartphone. In order to truly understand the purchase process and initial learning curve, an ethnographer accompanied each individual. Some individuals made purchases online or via phone, and the ethnographer was there listening in or watching the purchase as it happened. This way the ethnographer was able to establish an important initial rapport which would help participants feel like the ethnographer was a trusted confidant rather than a strange researcher.

We set up an online bulletin board as a central meeting place for all participants. It was here that they were asked to do pre-activities and to discuss their upcoming Smartphone purchase. In addition, all participants were given a small pocket cam so that they could record their thoughts, feelings and interactions with their phone after purchase. They were asked to upload videos on a regular basis to the site. We also asked them to use the Smartphone as a vehicle to provide pictures and additional information to alert the ethnographer to insights, new features learned or frustrations they were having. The texts, phone calls and pictures all provided snapshots of what was going on with the respondent; whether they were at work, home or were out and about.

The information obtained was not something that could have been gleaned through survey data or qualitative interviews alone. What was gathered was an intimate glimpse into the trials, frustrations and joys of becoming a first time Smartphone purchaser; it showed how the process is a true shared human experience. From this we were able to provide recommendations and insights back to mobile phone providers to help make the consumer Smartphone experience a positive one.

# Embracing Ethnography

**A**s a complex research strategy, ethnography requires agile researchers who must learn to navigate through a variety of techniques to understand the cultural complexity of human interaction. The reward for engaging in such multifactorial work in the market research arena is that we can arrive at a picture of consumer behavior that is detailed, complex, humanizing and insightful. Even though, as researchers, we think we know the right questions to ask, we often miss important findings by actually not asking the right questions. Ethnography reveals those missed findings by allowing consumer actions to speak for themselves.

Traditionally, researchers faced with a problem tend to ask consumers about their thoughts and feelings related to a particular experience with the hopes of eliciting insight from the answers received. While there is nothing wrong with this technique, it tends to be flat. Individuals will almost always provide the most socially acceptable answer and their memories are not solely to be relied on.

A trained ethnographer will be able to recreate, in minute detail, what actually happened. They do this by piecing together multi-dimensional relationships that look at unspoken cultural forces, cognitive decisions and behaviors. In addition, they understand how the forces of emotions and mood operate in that moment in time. The end goal is to identify the larger themes and patterns operating within the current environment and activity the participant is engaging in. Subtle clues, movements, and emotional state are all important activities that need to be accounted for.

Oftentimes, ethnography in market research relies on observational data only. While sometimes this is necessary (depending on the research objectives), ethnography employs participation as well as observation. A good ethnographer is one who is fully engaged, to the extent that is possible. Gaining an understanding of why someone is doing something most often cannot be found without asking further questions to access the state of the participant's mind and thinking. Ethnographers know how to, at once, be an unobtrusive observer while simultaneously gaining all pertinent information needed to provide a complete picture of what the participant is experiencing.

It's important to realize that ethnography is only as good as the ethnographer and an ethnographer is only as good as his/her field notes and ability to interpret the collected observations in a neutral way that is impactful, substantive, and reflects the truth and the reality of what occurred in a way that allows others to share the experience.

Finally, ethnography just isn't the act of participating or observing; the analysis itself, which tends to be descriptive in nature, is of critical importance, as it looks for local categories of meanings while trying to understand the participant point of view to understand the totality of their experience.



*Oftentimes,*  
ethnography  
in market  
research  
relies on  
observational  
data only.

# SIDEBAR CASE STUDY

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## BUSINESS CHALLENGE:

New smartphone adopters use data to differing degrees along a spectrum from heavy usage to very limited usage. Heavy usage creates “stickiness” and incremental revenues because users have downloaded many apps, customized their user interface, and may be using their providers’ data backup services. In contrast, light usage is an indicator that the customer has less “skin in the game” and fewer barriers to switching to another provider and mobile device. Wireless providers generally want to move smartphone adopters up the usage curve to create loyalty and drive incremental revenues.

## RESEARCH APPROACH:

Observe the experience of new smartphone adopters to understand where there were gaps between these new adopters’ aspirations for using their phone and their ability to fully utilize their new smartphone. A combination of in-person, deep laddering interviews and ethnography was used. Consumers who had never owned a smartphone but planned to purchase a smartphone within the next three months were recruited to participate. We define a smartphone as a wireless phone with computer-like functionality that goes beyond internet browsing and email.

## KEY FINDINGS:

1. Wireless providers assume consumers understand data terminology and can predict their usage. In reality, the industry jargon around data is extremely confusing to most consumers (streaming, tethering, downloading, etc.). Salespeople for various providers and in different types of stores were generally unable to explain data usage and data plans in terms that would help the new smartphone purchaser anticipate their usage.

Wireless providers generally want to move smartphone adopters up the usage curve to create loyalty and drive incremental revenues.



As a result, participants in the ethnography shop-alongs came away from the point of purchase fearful that they would exceed the data limit in their new plan and incur extra charges. They were hesitant to download and try applications or other data services such as mobile TV, which limited their “out-of-the-box” enjoyment of their new smartphone.

2. The wireless industry has made trialing and purchasing applications complicated from the perspective of a new smartphone adopter. During the first week of following participants along their learning path via online journaling and videos, most struggled to determine which apps were “free” versus which were only free for a trial period. Additionally, many of the participants were overwhelmed by the sheer number of apps available and how to research or determine which were going to be “good” or useful to them.

Again there was the fear that they would get stuck paying for an application that they didn’t like and would then have the hassle of figuring out how to remove it or cancel it. As a result, new users did not explore as many applications in their first two weeks as their initial aspirations suggested they would.

3. The next wave of smartphone adopters are not the same type of “DIY technofiles.” With 29 percent smartphone penetration among mobile phone owners in the US\*, the wireless industry has already captured the early adopters. Many of the participants in our study had follow-up questions or problems to solve. In many cases, the wireless providers pushed these new adopters to self-service solutions such as online tutorials or the FAQ area of a website or online community.

For some customers, these solutions were acceptable; for others, it only added to their frustration with their new mobile device. Typically this led to the customer reaching a usage plateau that they claimed they would eventually “get around” to overcoming. In extreme cases of dissatisfaction it led to the new adopter returning the smartphone and cancelling their service—a costly event for the wireless provider.

#### BUSINESS OUTCOME:

Findings were shared with several major U.S. wireless providers. At least one provider revised or re-launched sales processes to help new smartphone customers visualize and predict their data usage. Also, consistent with the findings in this research, the industry recently acknowledged at least one of the potential issues with assessing applications and recommended that an application “ratings” system be developed to alert consumers to inappropriate content.

\*“Nielsen: US Smartphone Penetration to Be over 50% in 2011,” GPS Business News, Tuesday, March 30, 2010. [http://www.gpsbusinessnews.com/Nielsen-US-Smartphone-Penetration-to-Be-over-50-in-2011\\_a2154.html](http://www.gpsbusinessnews.com/Nielsen-US-Smartphone-Penetration-to-Be-over-50-in-2011_a2154.html)