



Ethnography

From the Client Perspective

Presented to:



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Presented by:

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Jon Last

Ethnography

From the Client Perspective

Why This Study?

- ➔ **Claims about market research techniques predominate – especially about how “new” ones are superior to and taking over “traditional” ones**
 - Our 2003 client study explored the impending “death of focus groups,” which proved to be premature
 - Trade media continue to rightfully question modern day relevance of “traditional” qualitative (QLR) methods
 - Ethnography grows: an old method with a new twist on qualitative in the reality TV era

“...the whole point of focus groups is to be able to help us predict what’s going to work and what’s not. If a focus group cannot do that, then a focus group is actually useless.”

Speech by Malcolm Gladwell to the American Association of Advertising Agencies Account Planning Conference—Ad Age, 8/8/05



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Why This Study?

- ➔ **Little “research on research” exists to study what works from an objective, disinterested point of view**
 - Ethnography is much discussed – but how well is it understood?
 - Is it another tool in the kit or a new paradigm?
- ➔ **Clients care about what works so we asked their views**
 - What “ethnography” is
 - How/when it is used
 - Its value to corporations/organizations
 - Issues, obstacles to use
 - Who is best qualified to conduct it
 - The future

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From the Client Perspective

Where We're Coming From

➔ **Jon is both a client research buyer and a full-service research QLR provider**

- Has conducted ethnography/observational research in golf and leisure industries

➔ **Judy is a qualitative researcher**

- Uses varied QLR methods – focus groups, depth interviews, online bulletin boards
- Conducts in-home interviews and shopalongs, but not what she considers “ethnography”

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From the Client Perspective

Study Participants

- ➔ **26 clients interviewed by phone and/or e-mail; consultants recommend methods and/or were research buyers**
 - Advertising, Public Relations
 - Association Marketing
 - Beverages/Distilled Spirits and Alcohol
 - Business Services
 - Marketing Consulting
 - Financial Services
 - Health Care
 - Media
 - Packaged Goods
 - Sporting goods

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Ethnography's Greater Visibility

➔ Procter & Gamble in forefront, championing “immersion”

“Close observation of the boss [the consumer], and her active participation in the process of innovation, results in a more precise definition of the key needs, the price points, the route to reach her, the business model and the cost structure. And it all starts by doing something simple – keenly watching consumers, face-to-face, knee-to-knee, and listening, with ears, eyes, heart, brain, and your intuitive sixth sense.”

[Citing L'Oréal's success introducing a mascara in Japan, the CEO] “told the Financial Times, ‘We never would have seen [the potential] in a focus group.’”

The Game-Changer, A.G. Lafley and Ram Charan

The P&G logo is displayed in a white rounded rectangle on the left side of the slide. The letters are in a bold, blue, serif font.

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Ethnography's Greater Visibility

- ➔ **Unilever benefits from undertaking ethnographic research for Dove Soap, yielding dividends in packaging, design changes and branding**

"While researchers watched people using Dove Soaps, [we] realized that they kept them tucked away in a cupboard with cleaning products rather than with other beauty products." Neal Hurst, Design Director

Unilever researchers concluded that the consumer saw the product as a "low value, utilitarian solution." So, the firm designed new packaging that presented the concept to the consumer in a more visible and valuable way. The product packaging won a 2007 Starpack award.

Packaging News, June 9, 2008



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Ethnography's Greater Visibility



- **Marriott conducts ethnography to improve the hotel experience for young, tech-savvy road warriors**
 - 7 consultant team (including designer, anthropologist, writer, architect) took 6-week, 12-city trip to hotel lobbies, cafes, bars
- **Learnings about hotels**
 - Good serving large parties, not small groups of business travelers
 - Lobbies not well-suited for conducting casual business
 - Public places lacking for guests to comfortably combine work and pleasure
- **Results**
 - Reinvention of Marriott and Renaissance hotel lobbies
 - New “social zones” with small tables, brighter lights, Wi-Fi

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Ethnography's Greater Visibility

- ➔ **Golf Digest Publications illustrates baby boomer women's community-building through golf**
 - Firsthand look at the largest growth market in the game
 - Demonstrates the linkage between women's increased leadership role in business and politics with golf's social benefits

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Ethnography's Greater Visibility

- ➔ **Golf Digest Publications illustrates baby boomer women's community-building through golf**
 - Firsthand look at the largest growth market in the game
 - Demonstrates the linkage between women's increased leadership role in business and politics with golf's social benefits
- ➔ **GDP also uses observational research to study purchase process for golf equipment manufacturers**



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Ethnography's Greater Visibility

➔ Research providers that promote ethnography use varied definitions and, with increased competition, claim “product differentiation,” such as:

- SIS International emphasis on in-home observation
- Primary Insights approach “grounded in respect for respondents” with “ethnographic/observational sessions [ranging] from short sessions focused on a single activity to longer visits”
- C&R Research’s “InVision™” three-pronged process includes home visits, retail/point-of-product contact visits, respondent-generated pictures/videos



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The Client Study: Ethnography Use Has Grown

- ➔ **Several clients use ethnography more vs. a few years ago, others do not**
- ➔ **Growth attributed to success stories in media, conference talks, P & G leadership, “trendiness”**

“[We are] using ethnography a bit more than 3 years ago because our marketing teams are responding to the hype about the term in the marketing press.” (Packaged Goods)

“It had a well-deserved growth curve. I heard it had successes in product introduction. It’s sort of the technique du jour. I think it plateaued; it may level out. You see cycles in research that become big things and everyone wants to jump on the bandwagon to show how sophisticated they are; focus groups started that way.” (Consultant)

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So, What Is Ethnography?

- ➔ **Clients' definition of "ethnography" varies widely**
 - Classic ethnography with researcher grounded in social anthropology, participant/observer immersion for long period, cultural analysis framework
 - Market research version more pragmatic, shorter time, more "show and tell"
- ➔ **Agreement that ethnography is in "natural habitats"**
 - Home, office, bar, store, at the computer, golf course, etc.
 - *Not* at regular QLR one-way mirror research facilities
 - Usually with direct/probing interviews, video by participant or camera operator

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From the Client Perspective

Why Is Ethnography Needed?

➔ **Clients cite drive to get “below the surface,” “closer to the consumer”**

- Part of broader trend to greater, deeper understanding of the non-rational to understand real motivators of behavior

“Non-cognitive is very trendy. There’s a yearning to get beyond what people say. It doesn’t cast aspersions on people doing interviewing but if it’s not a rational process the best interviewer in the world will only get rationalizations.” (Pharmaceutical)

➔ **Ethnography is needed to find out:**

- What researchers don’t know to ask
- What people don’t know about themselves
- What people don’t want to admit

➔ **To dramatically demonstrate true consumer behavior**

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Is Ethnography Observation?

- ➔ **Conflicting views on whether behavior observation is a necessary element – some unaware this is even an issue**
- ➔ **Observations of what people do are crucial to some studies**
 - Examples: product use, shopping, cooking, bookmarked websites, interactions at dinner, where brands are stored, office processes brand influence in bars, showering (yes, really)
 - “Day-in-the-life” studies following consumers

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Is Ethnography Observation?

- ➔ **“Contextual interviews” show real-life setting of usage/ decisions, consumer lifestyle – not necessarily observation of participant’s behavior**

What you have is who you are:

- What’s in your closet/pantry/dresser/ medicine chest/pocketbook/car trunk
- How your home is decorated



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Is Ethnography Observation?

- ➔ **On-premise interviewing/video = ethnography to some**
 - “Girlfriend” and mini-groups, depth interviews in a “natural” setting
 - Person-on-the-street/in-store intercepts where products “naturally fit” vs. central location facility interviews
- ➔ **Others say these are on-camera interviews, *not* ethnography**

“This firm sold us on ethnography and we thought we’d watch how women do their lives day to day and their retail space, and we had women on their couch or in a coffee bar and it wasn’t what we signed up for. It was bad research.” (Advertising/Marketing Services)

“I often hear on-site interviews (in someone’s office) described as ethnography. I disagree. Only if I do something directly related to that environment (that I couldn’t do in a facility) would I describe this as ethnographic in nature.” (Financial Services)

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From the Client Perspective

Value/Uses Of Ethnography

- ➔ All users reported at least one positive experience with ethnography (as they define it)
- ➔ For “strategic” understanding, exploratory research at the beginning of the creative/innovation process
- ➔ Deeper understanding of:
 - How people live, their world
 - Truth of what they really do, not just say

“We have them open their pantry and tell us why they chose to stock things where they did. They may say they’re health-and-wellness oriented but we see things that are not articulated in another interview.” (Consultant)

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From the Client Perspective

Value/Uses Of Ethnography

- ➔ **Viewer impact – clients “get it” more than from watching facility interviews, vivid video “brings consumers to life”**

“You get a depth of feeling for what the customer does that goes well beyond the verbal or written description. Watch the administrative assistants going out of their minds. [We knew] this but until you see how they do it, how they accommodate to the task you don't realize how bad it is. You get more a personal appreciation of the pain they're going through.” (Consultant)

“It's one thing for a golfer to describe how they go about purchasing new equipment. It's quite another to actually observe their behavior on-course and at the practice range when demoing a new product. And the accompanying insights upon probing are also quite different.” (Sporting Goods)

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From the Client Perspective

Value/Uses Of Ethnography

➔ Viewer impact

“The goal was simply to see if [respondent] reactions matched internal opinions and other research. Showing our internal stakeholders the raw video had much more impact than any data points I could provide.”

(Media)

“We’ve taken senior management to people’s homes. The impact on them was greater than with focus groups. They get to know an individual person’s needs far deeper; in focus groups it’s snippets.” *(Financial Services)*

“Memories of who your consumers are really stay with you. It comes in handy, especially at the beginning of the creative process, describing to the creatives (who may not have been part of the ethnography team) who your consumers are. It can almost serve as a projective technique.”

(Pharmaceutical).

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From the Client Perspective

Value/Uses Of Ethnography

➔ Response is better in people's own environment

- More honest, less inhibited, especially on sensitive subjects
- More likely to remember what they usually do

“The key advantage of ethnographic approaches is the ability to ‘show me’ vs. just tell me. While you can have respondents bring some things to a facility, they certainly can’t replicate their entire home or work environments. I’ve actually gone into fields with farmers [and had] respondents really show how something works or something they have difficulty with right in the place where they would naturally use it.”

(Financial Services)

“Consumers can be inhibited when discussing alcoholic beverages in a group setting so the ethnographic approach makes the conversation more natural and allows for richer insights. By conducting discussions in the consumer’s home, either one-on-one or with a group of friends recruited by the consumer, the ethnography has more relaxed, natural setting that’s more conducive to uninhibited feedback.” *(Beverages)*

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From the Client Perspective

Obstacles To Use

- ➔ **Usage of ethnography among clients interviewed varies considerably**
 - Some use ethnography frequently
 - Even some who have found ethnography valuable limit their use
 - Others are wary based on mixed experiences
 - Non-users have hesitations and/or meet resistance

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From the Client Perspective

Reasons For Limited Use

Combination of factors prevent clients from using ethnography

➔ **Time required a major issue**

- Fieldwork – time out of the office, wasted time with “duds”/no-shows
- Analysis – reviewing videos

“Ethnography is wonderful but takes forever. The real time thing is making sense of them when you come back; that takes more time than focus groups. You have to see patterns; in focus groups it’s usually apparent but with ethnography pattern recognition often takes more time.”

(Financial Services)

“It’s an investment in staff resources, time out of the office and costs. It’s one to two hours each. The coordination to get there, the drive time and then to get back to the hotel, central location or office. The other frustrating part is the quality of recruiting. If a team is going out and a respondent is a no-show, that’s a half day lost. A team may have put aside a week and it hurts; in one-on-ones [at a facility], you can get by with one lost respondent [but not with ethnography].” *(Consultant)*

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From the Client Perspective

Reasons For Limited Use

➔ High cost another key obstacle

- Cost-per-interview is high, including vs. focus groups
- Total study price is high, even with fewer interviews
- Researcher travel time, “fancy filming” add to costs

“It’s primarily a budget issue. There’s just a lot less interest in big-budget exploratory research. Ethnography doesn’t stand on its own as a single project, but can bring a lot of value to a larger project. Unfortunately, it’s viewed as a ‘nice to have’ rather than the “nuts & bolts of necessity.”

(Media)

“Mostly, it’s a cost/value decision. Big investment to do ethnos, so the need really has to be there.” *(Media)*

“There’s a perception that ethnography can be very helpful and provide good insights but the cost has been high and there’s been a clamp-down on research spending [at my company]. If you think of the cost per interview and it’s thousands of dollars to interview one person, it seems outrageous but with a lot of ethnography we don’t deal with huge samples.” *(Beverages)*

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From the Client Perspective

Reasons For Limited Use

➔ A “hard sell” in some organizations

- Unfamiliar, “esoteric” image for some managers
- Difficult for researchers to demonstrate ROI

“I’m the only person [in my organization] who has used ethnography in more than a passing way. Many are open to it, but seem to have a reluctance, based more (I think) on their own lack of familiarity with ethnography than any specific concerns about the method.”

(Beverages)

“While ethnography is a very valuable research method, it is also costly, time-consuming and a hard sell. People just aren’t comfortable with it; it’s just not mainstream. If I told my publisher I wanted to do ethnographic research, it would be difficult to get through.” *(Media)*

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From the Client Perspective

Reasons For Limited Use

➔ A “hard sell”

“[We] have been trying to educate our internal clients about the value of ethnographic research. We’ve come close on a few projects but nothing has materialized yet. I think this is due to the costs, the long timelines, the desire of most clients for ‘numbers’ that can be easily dropped into PowerPoint slides and thus taken to market quickly vs. videotapes from ethnographic research that require additional time and money to produce a market-ready tool, [and] internal clients’ uncertainty about how they would use ethnographic results with their clients.” (Media)

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From the Client Perspective

Reasons For Limited Use

➔ Pigeonholed as only for broad exploratory phase by some

“A few years ago we were working hard to understand our consumer targets as people. Ethnography was great for that. Now we are building on that understanding with other methods. I’m sure we’ll come back to ethnography in the future.” (Beverages)

➔ Disappointing experiences

“I felt the ethnographer [on one study] didn’t tie things together. [It was] a litany of what she saw vs. organizing the information in a holistic way that was meaningful.” (Pharmaceutical)

➔ Facility-based interviews can be better, more convenient

“Sometimes you take someone out of the environment and you can focus more. IDIs can be done in sequence, from 9am to 10pm for two days.” (Media)

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From the Client Perspective

Reasons For Limited Use

- ➔ **Sample is small, even for QLR – and maybe different since respondents agree to “intrusive” visits**

“The sentiment [in our company] is, do we feel comfortable just doing 6 interviews? There’s comfort with numbers even though the information may be much richer [with ethnography].” (Beverages)

“Ethnography is small. The sample may not be representative. Who allows a stranger to come into your house? Can I go shopping with you? Watch you doing your laundry? Where you keep your toilet paper? Are these people more trusting and outgoing? More desperate to be listened to? More likely to think their opinions count?” (Media)

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From the Client Perspective

Ethnography Limitations And Issues

➔ How real is this “reality research”?

- Respondents may “put on a show,” try to make themselves sound good, clean the house beforehand, etc.

“I can’t help but feel that there’s some real ‘grandstanding’ going on. We’ll accompany a golfer into a retail environment, and he’ll pick up and rave about the benefits of the hot and costly brands. Yet, when we conduct purchase diaries, there’s a lot of knock-off product being purchased.”
(Sporting Goods)

“If there is more than two [observers], and the consumer is aware of them, then responses and behavior become more guarded and staged.”
(Advertising/PR)

“[We did an] informal girlfriend type thing. It felt so contrived. Too many people were watching. The whole idea was it is more relaxed and I agree with that. But it’s clear that there are four people sitting on the wall doing nothing. If you’re hiding behind the mirror in a focus group, you disappear. But not if they’re taking notes [in the room].” (Media)

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Ethnography Limitations And Issues

- ➔ **Trade-offs in having client observers**
 - Limiting the number of viewers avoids overwhelming participants, making them self-conscious
 - But clients who don't observe miss out on firsthand experience, must rely on researcher's analysis

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Ethnography Limitations And Issues

➔ Recruiting can be “super-intensive”

- Hesitation to have strangers come to, spend hours in their home/office, watch/record certain activities, disrupt routines
 - Examples from facilities: pre-teen girls showing lingerie items, women showering, Hispanic men shaving. More studies with extensive homework (1-2 weeks (journaling , collages, invite friends, send photos, etc.).

“[It’s] a little harder when you have to recruit somebody and you say I want to come in at 6 [am] and promise we’ll be out by 10 – but we found them.” (Consultant)

“Being a ‘fifth’ person in a golf foursome can be disruptive and flies against some of the very traditions of the game we are trying to study and observe. So I often find the practice range or clubhouse area to be much more conducive for our work than actually being out on the golf course.” (Sporting Goods)

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Ethnography Limitations And Issues

- ➔ **Ethics of researcher disguising role**
 - Go “under cover,” pretends to be fellow customer, grad student, etc.
 - Some clients think this is fine
- ➔ **Distorting reality through highly edited video content**
 - True target consumers or the pursuit of the “ideal customer”

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From the Client Perspective

Client Strategies

- ➔ **Some develop ground rules to promote respondent comfort**
 - Dress casually, blend in, pay attention, remain neutral, don't reveal your company name, let the moderator lead

“Whether behind the glass or openly visible, you have created a false situation. For focus groups or one-on-ones in a facility, I'm fine with this false environment because you've already taken the respondents from their normal routine. If the ethnographic study is in the 'natural' environment, you do everything you can to minimize the changes you make to that environment.” (Financial Services)

“We've had people apply creams to their feet and all sorts of interesting things. Once you get going, you disappear and become part of the household. You have to blend in, become a piece of furniture. Don't tell them what company you're working for or they'll think they have to tell you something nice or not nice, dress casually, let the moderator lead the discussion, be engaged and don't go on your Blackberry and cell phone, be in the moment.” (Pharmaceutical)

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From the Client Perspective

Who Should Do The Ethnographies?

➔ **Clients are divided in their views on this issue**

- Academic background important to some
- Individual skills more important to others

“It gets down to the individual. The cultural anthropologist will probably do a better job than someone who doesn't have the necessary skills. There are trained people who don't do a good job and untrained people who have an instinct for asking questions in a non-intrusive manner.” (Beverages)

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From the Client Perspective

Who Should Do The Ethnographies?

➔ **Cultural anthropology background preferred by several; also social science, psychology**

- **Pluses:** academic background/training, analyze in theoretical framework

“Good ethnography requires pretty rigorous training, along the lines of anthropology. The data must be precise and detailed; interpretation must be informed by a great deal of experience.” (Media)

“Someone who is curious, organized and methodical yet ‘approachable’ and non-judgmental. Someone with a background in psychology or cultural anthropology would be appropriate.” (Media)

“An anthropologist or sociologist [uses] a toolkit grounded in social scientific models and theories, not gut instinct or impressionism. They use that toolkit to discern significant patterns – traces of culture – in the data. What I look for is a good ethnographer (not a degree!) who will promise a deliverable that gives me a concise model of client behavior that I can use to start solving a business problem.” (Financial Services)

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From the Client Perspective

Who Should Do The Ethnographies?

➔ Cultural anthropology background

- **Minuses:** some have little understanding of marketing, client's category; "go broad, not deep," pursue irrelevant topics that interest them

"Sometimes ethnographers go off on tangents. It's free flow – you follow them and end up with some blah-blah." (Media)



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From the Client Perspective

Who Should Do The Ethnographies?

➔ **Qualitative researchers preferred by others, especially those with ethnography experience**

- **Pluses:** understands marketing, probes relevant issues, established relationship with client

“No specific training or background sought, just excellent moderators who are great listeners and interpreters of consumer feedback.” (Anonymous)

“For me, the general demeanor/attitude of the individual is most important. I generally can have a 20-30 minute conversation with someone and have a good idea whether they are capable of doing this kind of work. (If they spend all their time talking and don’t ask me any questions or bother to wait for a response, I know to keep looking). I’m also interested in specific experiences with outcomes. What have you done with this type of work and what happened as a result?” (Financial Services)

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Who Should Do The Ethnographies?

➔ Qualitative researchers

- **Minuses:** some talk too much, try to control the process

“I’ve run into in global situations with poorly trained moderators. There’s not a really robust understanding of how observing can help a marketing person. Some moderators think they have to be very active and some of it is ‘show me your medicine cabinet.’ They don’t get it.” (Pharmaceutical)

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From the Client Perspective

Who Should Do The Ethnographies?

- ➔ **Some clients conduct ethnographies themselves**
 - **Pluses:** market research experience, product knowledge
 - **Minuses:** lack of expertise, staff resources/time, possible bias

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From the Client Perspective

What's The Impact On “Traditional” QLR?

- ➔ **Ethnography is one method in the QLR toolkit, used more now but not replacing facility-based interviewing**

“I don’t think ethnography will (or should) replace other types of qualitative research! I look upon ethnography as just another research method – it’s a means to an end.” (Media)

“Ethnography doesn’t replace focus groups. We utilize both and have gotten good at using each method.” (Financial Services)

“Most people still have a comfort level with other [qualitative] approaches. They wouldn’t want them to be reduced. Also, the separate issues that are addressed by traditional methods haven’t gone away.” (Beverages)

“We use the methodology that’s most appropriate for the marketing issue at hand within the budget and schedule. Other techniques are still relevant for feedback on marketing stimulus and are generally more efficient than ethnography.” (Beverages)

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From the Client Perspective

What's The Impact On “Traditional” QLR?

➔ Ethnography has reduced use of focus groups, depth interviews for some clients

- Focus groups are no longer the automatic QLR choice (“get me some FGs”), especially early in the research process

“Many of my internal clients, instead of saying ‘go set up focus groups,’ said ‘go set up ethnographies’ because they got more insights. They got a taste for it in a real setting rather than in focus groups. The ethnography took the place of focus groups or reduced the use of focus groups to generate ideas but once they needed to be developed or in early round of testing, we’d use focus groups.” (Consultant)

“I think that ethnography has replaced some of the one-on-ones because they’re richer learning. The focus groups still have their place for consensus building and culling down ideas. For innovation, I do think ethnography has an advantage.” (Consultant)

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What's The Impact On “Traditional” QLR?

- ➔ **Focus groups, depth interviews still have an important role**
 - For “tactical” issues – reactions to stimuli (ads, visuals, concepts)
 - More “efficient” than ethnography
 - “A semi-ethnography component” can be included (e.g., respondent photos/video)

“I think of focus groups to get narrow things. If I have 8 concepts, what’s working better than another, what language is working better? When I’m trying to get something deeper and something I didn’t know what to ask, I would use one-on-ones. If I have the choice and the time – there’s time and money associated with ethnography – I’d opt for ethnography hands down every time.” (Pharmaceutical)

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What's The Impact On “Traditional” QLR?

➔ Focus groups, depth interviews role

“It’s one of many methods, doesn’t come close to replacing traditional qualitative. Relatively little [research we do] is the exploratory stuff that ethnography’s good at. We do message development, ad testing and I don’t see ethnography doing that. It’s ‘we want to do this and what do you think of this?’” (Pharmaceutical)

“It’s rare that we do a study that doesn’t have both ethnography and focus groups. They both have their purposes. We try [ideas] out in the focus groups based on earlier insights and ideas drawn from the ethnography. Focus groups yield time and efficiency that can lead to tighter and more effective surveys.” (Financial Services)

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What's The (Short-term) Future?

- ➔ **Ethnography use will continue to be strong or to grow, some believe**

"This big push for deep consumer understanding, look at the consumer landscape, to identify what consumer you go after and what the advertising should be. A real call to the researcher to bring these people to life." (Consultant)

What's The (Short-term) Future?

➔ Others expect a plateau or drop-off, or aren't sure

- Some large corporations already use it extensively, smaller ones are less likely to
- Disappointment puts some off from using/recommending it
- Today's tough economy is a major issue for a method already seen as expensive

“Talking to people in other companies, everyone's experiencing the financial squeeze and research programs are being cut back, everyone's operating with minimal budgets. In some cases that might mean the mega projects will fall by the wayside and people will rely more on ethnography. Could go both ways.” (Beverages)

“If everything were okay economically, it could increase. Trying to know our people in a deeper way, that's a trend, but they're expensive, things are hurting so it would be doing well just to stay the same.” (Pharmaceutical)

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From the Client Perspective

What Did We Learn?

- ➔ **“Ethnography” has grown in interest, demonstrated usefulness to some clients**
- ➔ **“In-context” interviewing in and observation of people’s “natural habitats” is used more often than true ethnography with observation of behavior**
 - Debate exists about on-premise interviews being “ethnography”
- ➔ **Main benefits seen:**
 - Uncover unarticulated needs, true behavior, motivations/emotions
 - Understanding people’s lives/environments on a gut level
 - Vivid video for conveying results/selling

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What Did We Learn?

- ➔ **Serious obstacles to greater use exist:**
 - Time, costs, very small samples limit use, even among fans – especially now
 - Some internal clients remain wary, but this may change as awareness grows
- ➔ **Clients disagree on value of ethnographers vs. qualitative researchers and clients**
- ➔ **Ethnography has a major impact on QLR**
 - Focus groups are less likely to be clients' automatic QLR choice
 - Ethnography is used more for “strategic” issues, FGs/IDIs for “tactical” issues

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Study Participants

Harun Asad, Research Director, AOL

Mark Bequeath, Director of Consumer Insights, Meredith Corporation

Terry Campion, Director of Custom Research, Condé Nast Publications

Allyson Clarke, Vice President Associate Director Insight Creation, Manning Selvage & Lee

Doug Cottings, Executive Director, Head, Market Research & Analysis, UBS Financial Services

Ron Gailey, SVP/Director, Research & Customer Insight, Washington Mutual

Jo Holz, Vice President, News Research, NBC Universal

Bret Jacobowitz, Research Consultant

Larry Kahn, VP Research, Golf Channel

Mike Kallenberger, Consumer Intelligence Manager, Miller Brewing Company

Jean Koppen, Senior Research Advisor, AARP

Debra Lund, Director of Strategy and Development, Newsday

Barry Martin, Executive Director, Consumer Research and Insights, Time Inc.

Bernard D. Novgorodoff, Ph.D., AVP, Director, Consumer Insights Group, Brown-Forman Beverages

Rick Perko, President, Immersion Media

Mark Perline, Research Consultant

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Study Participants

Leslie Perrell, Research Manager, Bayer HealthCare

Nina Richman, Research Consultant

Louis Sawyer, Chief Marketing Officer, Blattner Brunner

Cary Silvers, Director of Consumer Insights, Rodale Publishing

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Ethnography

From the Client Perspective

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