ETHNOGRAPHY FOR DESIGN



PURPOSE

The purpose of this guide is to give an overview of ethnographic field research as a means for developing empathy for humans and generating new design, product, and brand opportunities as a result. These methods can be utilized by any organization – big or small – looking to take a peoplecentric approach to problem solving and solution generation.

DISCLAIMER

This guide does not serve as legal advice nor is it a substitute for hiring an experienced researcher to help execute a project. We acknowledge that each research project is different and will require different approaches to be successful, including many that we do not touch upon here.



W H A T I S E T H N O G R A P H I C F I E L D R E S E A R C H ?

Ethnographic research is the practice of interacting with and observing humans in order to understand them deeply.

The goal of this type of research is to develop empathy for the people that you're designing and creating for.

It is a generative research method and should not be employed to find one right answer to one question - rather, you'll walk away with many answers and many new questions.

Ethnographic research efforts will usually involve a smaller number of participants than you are used to. This research approach will not generate statistically significant results, and it's not meant to.

You will find that a smaller than expected number of conversations, interactions, and experiences will produce a significant number of useful and inspirational insights.

ETHICS

Our research ethics drive how we behave before, during, and after our interactions and conversations with people. We believe it is important to have an early conversation with your research team about your ethical standard before you kick off your work. While these will vary by team, we are sharing some of the research ethics we choose to live by in our work.

BE HONEST & UPERONT

Tell your participants who you are, what the objective of the research is, and what you plan to do with the research findings. You can do this and still respect the confidentiality of a client, if that is a requirement as well. Send them a project description, sample interview topics, and a media release form ahead of time so they have ample time to review it and understand expectations.

SFFK PFRMISSION

Seek permission with your participants. Ask permission to enter their homes and workplaces, to engage in certain topics of conversation, and to take pictures. Even if something is spelled out in a consent form, it is respectful to voice the ask again, live and in-person.

RESPECT THE STORIES

As a researcher, it is your responsibility to be true to the stories you hear in the field. Treat them with respect and maturity. As you share their stories, stick with what you heard in the context in which you heard it. Observations in the field drive our eventual design narrative—not the other way around.

SEE & SET BOUNDARIES

Understand when your participant does not want to speak about something and respect that. Learn about local data and privacy laws that will restrict how you use the data you gather in the field. Talk to your team beforehand and understand your own boundaries as researchers. Have a safety conversation with your team, and always let someone not on the interview with you know of your location and timing.

ASK FOR ADVICE

There is likely someone with more familiarity with and an expertise in the area you're focusing on. Find them and engage them early on. It's often a great idea to do some pre-research with these individuals. Ask them for their advice, to take a look at your research plan, and to even join in on the process.

TYPES OFFIELD RESEARCH

IN-DEPTH INTERVIEWS

These are usually 60 to 90 minute one-on-one conversations with people that you're interested in learning more about. They may fit into a defined target market that you already have or be part of a larger group of people you want to design for. We recommend having these conversations in the individual's natural context: their home or workplace are often great settings. Sometimes it makes sense to do these in pairs.

EXPERT INTERVIEWS

These are usually 60 to 90 minute conversations with experts in a field related to your design challenge or project focus. You can use these conversations to quickly get up to speed on a new field, discipline, or market. These often inspire interesting point of views or solutions.



RIDE ALONGS

Spend a day with someone. Be a fly on the wall. Understand how they go about their to-do list. While it's not entirely a natural experience, you'll learn more about what happens between planned activities and have a chance to spend more time with the participant.

DINNER DISHES

These are 2 to 3 hour group research dinners. Set up an informal setting for dinner or lunch. Bring in some good food. Invite people in and moderate a free-flowing conversation. Ask that the group co-create a solution to a design challenge. A group dynamic can lead to different types of discussions than a one on one.

ANALOGOUS EXPERIENCES

Go do an activity that may be adjacent to your project but that you believe could inspire new ways of thinking about the challenge at hand. Looking to understand top notch customer service? Spend a day at Disney. Curious about how people make financial decisions about the future? Spend some time observing gamblers at a casino.



SET YOUR OBJECTIVE

Setting a clear purpose serves as a north star for your research recruitment, interviews, and synthesis efforts. Additionally, clear objectives help communicate expectations and goals to potential interviewees and your broader stakeholder network.



RECRUIT YOUR PARTICIPANTS

WHO

If your target market is already defined, there you have it. We'd encourage you to include those that may stray a bit from your core demographic as well. You never know what you can learn from users who may be a bit outside of the core definition.

HOW

Write up a brief description of your project and what you're trying to achieve. Be honest and upfront about your goals, who you are, expectations, and compensation. Post this to social media, experiment with Craigslist or Facebook ads, shoot an email to your broad network, or engage recruiting services.

Ask potential participants to fill out a short written questionnaire. Capture their contact information and any must-have screening criteria. Include one or two open-ended questions to give them an opportunity to show thoughtfulness in their responses.

Once you have potential interview candidates, ask to hop on the phone with them for a quick five minutes. Ensure that they meet your screening criteria and that they'll be thoughtful, interesting individuals to meet and learn from.

WHERE

You learn most when you speak with participants in their natural settings. This usually means at home or at work. If you or the participant is uncomfortable with that, suggest a coffee shop or public library that is convenient for them.

SAFETY

Never go anywhere or meet with anyone that makes you feel uncomfortable. Always perform research in pairs and make sure to inform someone else not joining the research of your location and timing.

COMPENSATION

We recommend that you compensate participants for their time or offer to make a charitable donation in their name. Some researchers will compensate with cash and others will follow up with a digitally-delivered gift card.

INTERVIEW GUIDE

Aim to generate questions that tie back to your research goals. Be thoughtful in what you want to learn and organize your questions into logical groupings to guide your conversation.

Don't feel obligated to ask every single question on the guide. Hit the ones that you feel are crucial but let the participant guide the conversation. Your job is to explore within the guardrails of the design challenge and to use your gut to say when it's okay to go off the path for a little bit.

HOMEWORK

For some projects, it is helpful to ask participants to prepare a homework assignment ahead of time and bring it with them to the interview. This makes sense when an ask might require more time than scheduled in the interview.

You will want to factor this extra time into your compensation.

EARLY PROTOTYPES

At any stage of research, we recommend bringing visual representation of hypotheses or hunches for participants to react to and engage with. If you are in a stage where you have concepts or value propositions you want to test, develop one-page mock-ups for each of those. If you're just starting out, create "Sacrificial Concepts" of products that may or may not exist today in order to generate a different, yet relevant, type of discussion with the participants. You can sketch by hand, show a similar product that already exists, or hire an illustrator for the job.



PREPARE RESEARCH TOOLS



SET EXPECTATIONS

Introduce yourself to the participant. Restate your goals and how long you expect to have a conversation. Let them know what activities you may ask them to do later on and that they can back out of the conversation at any time.

BE HUMAN

Dress casually, and don't let your clothes be a distraction to building rapport with your participants. Speak like a human and react like one, too. While you are interviewing, it's okay and expected to feel different emotions during these conversations.

IFT THEM IFAD

Your interview guide is part of your toolkit, but it's important to let the participant guide much of the conversation. You can't plan for their stories, jokes, and emotions in a pre-planned discussion guide. If there are certain questions that you must ask for the success of the project, keep those written down in your notebook so you don't forget before you leave.

QUESTION FRAMING

Be aware of how you frame your questions. Experiment with starting more questions with "How" and "Why". Avoid leading questions or offering answer options at the end of your sentences.

GET SPECIFIC

Ask about specific stories or instances of events in the participant's life. Useful prompts include: "Tell me about a time when..." or "Describe the last time that happened."

FOLLOW EMOTIONS

Ask more about stories or topics that elicit emotions from the participant, both positive and negative ones. However, only explore topics to the extent that the individual feels comfortable doing so.

TAKE NOTES

Bring a notebook and take notes by hand, but make sure that note taking is never distracting to the actual conversation. Sometimes teams will assign one person as the notetaker and another as the interview lead. Use digital tools, like audio or video capture, sparingly.



AFTER

FOLLOW UP

Thank the participants for their time and willingness to share. If agreed to, be sure to send them compensation if you did not during the session itself.

DEBRIEF INDIVIDUALLY

Carve out time to look through your notes while the interview is still on your brain and to write down anything still on your mind. Be sure to mark down important takeaways, especially those stories or facts that surprised you.

DEBRIEF WITH TEAM

Set aside 30-45 minutes to debrief with your research team. Take turns sharing specific anecdotes, quotes, insights, and facts that stood out to you. Share questions or new concepts that came to mind. Capture all of these individual points on separate sticky notes and put them somewhere the whole team can see them.

PREPARE FOR SYNTHESIS

Your interviews are only as valuable as how you end up synthesizing what you heard. Get your whole team in a room with all of the outputs from your interviews. Work to answer: What patterns do we observe? What insights are most challenging our thinking? How should we now view the world based on our findings? What opportunity areas do we see for further design and research?









PAPER VENTURES

Paper Ventures is an ethnographic research and futures design firm. We partner with organizations focused on bold, conscious creation. Together, we leverage a human, multidisciplinary approach to design, build, and launch forward-looking brands, products, & services.

We work with organizations through our four main disciplines:

- 1. Ethnographic Research
- 2. Futures Design
- 4. Innovation Strategy & Deployment
- 4. Venture Co-Studio

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We work with organizations through four main disciplines:

1. ETHNOGRAPHIC RESEARCH

Understanding and empathizing with humans is the foundation of all of the work that we do. We employ an ethnographic approach to our design work - leveraging tools from design researchers, anthropologists, and documentary filmmakers to deeply get to know the individuals for whom we are designing. Through this ethnographic work, we arm your team with the stories of the customer and unique opportunities for innovation and differentiation.

3. INNOVATION STRATEGY + DEPOLOYMENT

We help organizations design and launch new innovation labs and venture studios of their own. We leverage all of our regular tools and mindsets, including ethnography, prototyping, and vision setting, to design and execute strategies that work for each organizational culture. This includes executive strategy co-creation, KPI development, role design, team hiring, opportunity identification, and design training.

2. FUTURES DESIGN

We believe in the power of setting forth bold, provocative visions of the future. Painting a future that we believe will - and should - exist serves as a rallying point for future-facing organizations and a North Star to drive and focus research and development efforts.

4. VENTURE CO-STUDIO

Together, with your team, we research, design, prototype, develop, launch new products and services quickly and iteratively. We believe in hypothesis-driven go-to-market approaches and prioritize speed to learning. We execute across digital and physical new products, services, brands, and experiences.