Practising Participant Observation: an anthropologist's account

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Practising Participant Observation: an anthropologist’s account

Abstract

Purpose
The aim of this paper is to provide an anthropological viewpoint on the debate about the uses and abuses of the method of ethnography in the field of commercially motivated research.

Design/methodology/approach
The objective of the paper is to explore the method of ethnography from an anthropological perspective, focusing specifically on the field research method of participant observation. This is in order to examine what of value is being lost as ethnography transforms into a different kind of method outside of the academy.

Findings
The paper proposes further critical debate between academics and practitioners of ethnography in and outside the academy. It suggests that the Journal of Organisational Ethnography is an ideal location for this debate to take place. The paper argues that ‘observation research’ might be a more accurate term to describe research that does not combine participant observation proper with a commitment to critical enquiry into the conditions of possibility of commercial and governmental organisations under the specific political and economic conditions of capitalism.

Originality/Value
Original about the paper is the imagination of what a crash course in ethnography would need to consist of both for would-be ethnographers to gain a sense of the specific value of the method and for students of anthropology to appreciate that doing ethnography is not a mystical rite of passage or vague process of ‘deep hanging out’, but rather a methodological technique that relies on a theory of learning, which must be elaborated in order to learn how to do ethnography well.

Article Classification: Viewpoint

Key Words: commercial ethnography, anthropology, participant-observation
Ethnography has become a taboo utterance among many marketers, and for good reason. The word, and the methodology, have been misused and poorly represented by market researchers, who perceive ethnography as a mere extension of the qualitative portfolio. As a consequence, the perceived value of ethnography to market research has been eroded and it now carries a stigma in some circles.

2006. Nick Agafonoff, Director, Interloper Pty Ltd.

Intimate ethnographic portraits of real people and their subjectivities underpinned with strategic learnings for how to communicate with them, how to innovate for them, how to service them, and how to position your brand towards them for the future.

2011. Nick Agafonoff, Director, Real Ethnography Pty Ltd.

The above quotes demonstrate well that ethnography has not only escaped from its conventional disciplinary and academic confines, but is suffering as a result. The difference between the two quotes, from the same commercial ethnographer, highlights what is at risk in the commodification process, which is the rarity and worth of the method. Mispackaged and sold cheap in the bustling marketplace of the knowledge economy, it is clear that ethnography is becoming rated too low and the rush is on to restore its exchange value. This is to be achieved, I argue here, not through a renewed promise, from its salesmen, for a higher quality, profit-promising product, but via debate between academics and between academics and research consultancies about what kind of methodological beast ethnography is becoming - out there in the wild – and whether or not it ought to be tamed.

Imagining myself in conversation with would-be ethnographers, I welcome the opportunity to clarify, as an anthropologist, what kind of method I understand ethnography to be and what constitutes its intellectual value. For the sake of argument, I outline what a crash course in ethnography might look like and explore some of the issues raised for practitioners of the method in and outside of an academic context. Challenging its traditional custodians to stake a claim, and recapture ethnography for its own good, my suggestion is not that the method ought to be kept as an academic privilege, which would anyway be impossible, but rather, that there is a need to defend its care, as a professional standard. In this respect, the advent of the Journal of Organisational Ethnography is timely. It provides an opportunity not only for an inter-disciplinary discourse on what is distinctive

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1 “An average research project will cost around $200,000,” says Stephen Wilcox, Ph.D., founder of Design Science, one of a few dozen competing global consultancies that market their ethnographic research to huge corporations. However, Wilcox says that projects in the $20,000 to $30,000 range are not unusual. [http://www.iida.org/content.cfm/anthropology-in-design](http://www.iida.org/content.cfm/anthropology-in-design). Accessed 15<sup>th</sup> November 2011.
about ethnography focusing on those highly specific kinds of human collectives we call ‘organisations’, but also what difference it makes when organisations flip the script and self-consciously attempt to more efficiently capitalise by mobilising versions of ethnography for themselves.

A Crash Course in Ethnography

Unlike their counterparts in America, for whom there is a longer pedagogical tradition, many anthropologists in the British tradition still propagate the myth that postgraduate students cannot explicitly be taught how to do the fieldwork research on which the method of ethnography depends (Mills 2011). The period of participant observation research remains, therefore, something of a mysterious rite of passage, a prolonged period of ‘deep hanging out’ (Clifford 1997:188) with research subjects from which the initiate emerges transformed, but still not yet an ethnographer. The final, rather tortuous phase of analysis and ‘writing up’ completes the initiation, but only when further analytical sensibility about the human condition is gained from cross-cultural comparison does an ethnographer then also become an anthropologist (Ingold 2008).

Shrouded, to a certain extent, in secrecy and mythologized as method, it is no surprise that there is a degree of dismay among applied ethnographers, and indeed among anthropology PhD students (Pollard 2009), about how would-be researchers come to know exactly what the ethnographic method entails and how it might best be put to use (Harper 2000). The obscurity of the method means that it is less of a shock, too, to see that, outside of the academy, there is a significant degree of invention going on. Increasing numbers of specialised corporate ethnography companies now compete to innovate in order to distinctively brand their own methodological product to business corporations eager to jump on the ethnographic bandwagon (de Waal Malefyt 2009). Whilst methodological innovation is not to be discouraged per se, in the worst case scenario, some so-called consumer ethnographers are seen to be making the method up as they go along (note, for example, Harper’s dismay [2000: 214] about bad practice encountered in the field of user research) and promising to clients, nevertheless, the distinctive outcomes of an ethnographic project, which are often described as ‘deep’ knowledge and ‘break through’ insights.

2 The challenges raised by research subjects mobilising social science methods for their own purposes mirrors in interesting ways the dilemma created for anthropologists when categories, like ‘culture’, which were once analytical for the observer, have become incorporated by the people being studied into their everyday lexicon often for self-conscious, strategic political purposes (see, for example, Oakdale 2004).

3 Of particular interest and worthy of debate as a matter of concern in its own right is the central part that documentary film making is beginning to play in defining what makes user research ethnographic.
For anthropologists, the distinctiveness of ethnography is specified in three ways: it is a highly particular way of going about doing research, principally but not exclusively using the method of participant observation; it is characterised by a certain kind of writing (both during the research process itself when field notes are produced and in the final form as a published analysis/monograph or research article); and it is a method distinguished by its object of interest, which is ‘the field’ of human interaction collectively differentiated and understood from an insider’s points of view. For the anthropologist, it is the experience of what it is like to learn, over time, how to participate effectively as a member of the social group in question that teaches him/her what it is – experientially - to be part of that group. Participant observation literally entails observing through participating such that the self becomes the primary research tool. The objective is to make an embodied, visceral journey into the socially and culturally distinctive way of life of a particular group of people in order to know what it is to inhabit their environment, live their social relations, understand their preoccupations and appreciate their values and feelings about each other and what matters in their world. The aim is to gain insight into what it is like to experience the world from a different point of view and to question, thereby, everything that is taken for granted about what it is to be human.

The ethnographer approaches the investigation of social life in terms of geographical sites or complex sets of intersecting situations comprising ‘the field’ where various kinds of human interaction take place that are typical for the particular group of people being studied. Focusing in on what happens in any situation, the complexity of the task facing the participant observation researcher becomes clearer in terms of the challenge of trying to capture not just detailed descriptions of the constant unfolding of social interaction, but also the significance and meaning of it for those who are taking part. The position of the ethnographer is revealed from this perspective as a novice (Evans 2006b) – the would-be participant – who must approach from the periphery of the action, seek permission to join in and, from that ‘legitimate periphery’ (Lave and Wenger 1991), begin to understand, as a result of observing and practising over time and across a variety of situations, what counts as appropriate participation among these people. By embodying the skills required to act appropriately in any situation, the ethnographer comes to appreciate the two-fold nature of participation: as s/he learns to do well at whatever the situation demands in terms of material expertise, the ethnographer is also learning about and hopefully doing better too at forging and, therefore, understanding what are considered to be proper social relations.

4 For visual anthropologists, the ethno-graphic film is intrinsic both to the fieldwork and post-fieldwork analysis, but it is by no means considered to be essential for anthropologists to learn to make films in order to be considered good ethnographers. Indeed, when students are preparing to go and do fieldwork it is more likely to be the case that they are told that the best way to learn how to produce good ethnography is to

5 With the advent of the Internet and social media and, therefore, of virtual ethnographies (Hine 2000) the field might be just as appropriately described as an epistemological terrain rather than necessarily an easily identifiable geographical site.
The ethnographer is, then, doing research by learning about what it means – in practice - to be incorporated into a specific human collective and, thus, to know and be able to analyse what it is to experience social life from the perspective of the people s/he is studying.

The point to emphasise is that, fundamentally, participant observation fieldwork research is a learning phenomenon. This means that, for anthropology students and would-be ethnographers to learn how to do fieldwork well, they need a theory of learning that is properly instructive, one that debunks the myth of fieldwork as an illusive process of ‘deep hanging out’, that situates learning as the foundation of what makes human social and cultural distinctiveness possible (Toren 1999) and that necessarily entails an engagement with social theory as a defining feature of the ethnographer’s craft. At the very least, the student who has a notion of the situation as a unit of analysis is better prepared to efficiently ask of and compare across any set of circumstances in the field the following kinds of questions: what is happening here? Who is taking part? What counts as competence? Who are the experts? Who is excluded from the action and why? How is the boundary on participation maintained? Who contests what counts as participation and what is the consequence of resistance? Who are the novices? What are the spatio-temporal arrangements/limits of the interaction? How are social relations organised and structured through this practice? What bodily skills are required to participate and what materials/tools? What cultural values and ethical dispositions emerge from the practice? Where is the tension/the drama/the poetry/the conflict? What is the aesthetic/the feel/the flow of action? How can I take part?

In an attempt to advance Lave and Wenger’s (1991) theory of situated learning, I have argued elsewhere (Evans 2006b) that participation always takes the form of an exchange relation. For the ethnographer, this necessitates an especially detailed focus on how inter-subjective relations work in practice in the various situations of fieldwork and, especially, how exchanges in language, material objects and bodily posturing make certain kinds of materially mediated action possible. The process of working out how personal and material value is created and transformed through exchange relations is what defines social life and it follows, then, that novice ethnographers need to be taught how to observe, what to look out for and how to be prepared to participate. Being equipped to approach the field in this more pragmatic way provides the grounding, I would argue, for the intensity of existential challenges that follow. This mirrors well the ‘re-turn to practice’ in organizational studies (Miettinen et al 2009) and there is some potential too in thinking of the various situations of fieldwork as diverse kinds of ‘communities of practice’ (Lave and Wenger 1991), which provides potential common ground for comparing and contrasting both the method and outcome of anthropological fieldwork and user ethnographies explicitly focused on particular kinds of materially mediated human practices that have implications for product design etc. Indeed, Etienne Wenger (1999 & 2000) went on to apply his theory of situated learning in the corporate world and ethnographers have traced its trajectory and popularity.
for businesses thinking about user engagement and knowledge management (Makoto Su et al 2011)⁶.

**Existential Challenges and Critical Potentials**

Going to the field, putting to one side⁷ his or her own expertise as an academic and as a member of the various human collectives to which s/he belongs ‘at home’, the anthropologist often experiences ethnographic research as a profoundly disorientating and humbling experience. The often extreme difficulty of participant observation is given by the necessity for the researcher to have to grapple with the bias brought to the field from his or her own social and cultural background⁸. Doing ethnography involves, then, not only learning, over time, about the perspective of ‘the other’, but also having to cope with the existential dilemma of unlearning or challenging everything that was considered to be objectively normal about one’s own life before undertaking fieldwork research. It is this gaining of a self-conscious, reflexive perspective on oneself and one’s own people, and not just ‘the other’, that allows for the possibility that ethnography can be both a life-changing method and a critical, consciousness-raising project.

The developing awareness of the ethnographer includes a conscious understanding that the relationship of the researcher with the group of people being studied is a particular historical moment in and of itself and the conditions for the possibility of the research must be kept constantly in the frame of analysis. This attentiveness forms part of the general ethical and analytical sensibility of the ethnographer who becomes preoccupied with the human collective as a historically specific entity. Social processes observed in the present are seen to make manifest the history of the formation and transformation of the collective over time. Especially when the focus of research demands an examination of the political and economic effects of and personal experiences associated with a history of colonial and/or social class domination and the globalisation of consumer capitalism, the opportunity arises for the ethnographer, through critical self-reflection, to bring to light and

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⁷ This bracketing of the expertise and personal history of the ethnographer is, of course, partial and people in the field always posit assumptions about the history of the researcher both as their object of interest and as the reason for allowing the research to happen. The ‘naïve’ position of the ethnographer, to some degree, involves bad faith, which is often a cause of anxiety on both sides because the ethnographer and the people being studied know full well that the ethnographic enterprise depends on the suspension of disbelief in the powerlessness of the ethnographer in the field.

⁸ I have discussed elsewhere the particular emotional and epistemological challenges of conducting ethnographic research among people whose practices are entirely at odds with what counts for the researcher as ethical conduct and how a visceral sense of disgust is theoretically revealing of the way that humans come to embody values they hold dear (Evans 2006b).
assess modes of dominance, how they operate in practice and are resisted or not. In all kinds of ways, it is the development of this critical stance which is absent, by default, from ‘ethnographic research’ that puts itself simply in the service of commerce and which does not contain, at its heart, an intellectual commitment to reflexive critique about the unconscious workings of political economy.

In the field, the ethnographer experiences important methodological tensions. Firstly, there is the kind of learning that happens through close observation – which involves carefully watching and listening to what others do and say and asking questions about their behaviour in situ. The problem with this is that people tend to take for granted what they do and cannot necessarily answer explicit questions about their behaviour in any meaningful way – answering, for example, that this is just how things are or how things have always been. In the beginning, the majority of the researcher’s questions are more revealing of the perspective with which he or she enters the field and it is only in time that it becomes clear what makes for an ethnographic question – i.e. a question that is genuinely meaningful to informants - one that they might pose to themselves and each other. In addition, people are, usually for quite a while, guarded about the presence of a stranger in their midst and it takes time for trust to be gained, rapport to be developed and for the researcher to appreciate the often considerable discrepancy between what people say and what they do in practice. A critical turning point or pivotal shared experience usually transforms this situation, leading to an appreciation among informants that the researcher really wants to shares their troubles and, more importantly, is capable of understanding the challenges of life from their perspective (Harper 2009). This means, from the beginning, that the ethnographer must be prepared to be in the field long enough for these issues of trust and rapport to be grappled with and overcome and it is open to debate how long this is likely to take. Certainly, the idea of ‘rapid ethnography’ (Handwerker 2001) pushes at the limit of what defines the ethnographic method, which is a commitment to developing meaningful relationships and a sense of open-endedness about what is going to emerge as interesting and worthy of investigation (Gellner & Hirsch 2001).

Secondly, as already emphasised, there is the kind of learning, which takes place through participation – actually taking part - over a long period of time (typically, for anthropologists, a year to 18 months) and developing, thereby, a deepening affinity for and with the people being studied. Some would argue that a ‘proper’ ethnography is possible based on close observation alone, insisting that what characterises the method is the orientation to the

9 For example, in my ethnography of a primary school I literally got nowhere with trying to understand the perspective of a group of troublesome boys through observation and questions alone. After three months of building trust in the classroom environment I finally had a break through moment where my participation became ‘legitimate’ in their terms and thereafter everything changed in terms of the knowledge I was able to gain through participating to a degree in these boys’ peer groups (Evans 2006).
insider perspective and the development of rapport, which still makes possible a meaningful ‘alongside’ engagement with research subjects without having to literally join in the activity (Harper 2009). Some anthropologists would agree with this (O’Neill 2001), but they might disagree with Harper’s third condition for an ethnographic method (2009:254). This suggests that what also defines the method is an acute awareness of what motivates the questions posed during ethnographic interviews. For Harper, this is all about the pragmatic question of zoning in sufficiently on the kinds of activities – such as information processing related tasks – that are the focus of the research. Anthropologists might argue, contrary to this, that what makes an ethnographic enquiry distinctive is that the questions asked in ethnographic interviews are precisely not those predetermined in advance by the researcher, but those that have emerged, during the process of research, as being of importance to informants. This is, surely, a mark of the difference between ethnographies for organisations, in which a particular, often quite narrow, ‘use’ value is required of the research, which allows for a limiting of time taken in relation to the known-in-advance focus of interest, and ethnographies of organisations, in which the characteristic open ended-ness of the enquiry captures a more ‘holistic’ sense of what it is for an organisation to exist and for persons to define themselves as being part of it, even if they might be alienated from its goals. This kind of research is more likely to lead to a broader set of questions about organisations including, and perhaps most importantly, how any organisation substantiates the highly specific political economy of which it is part (Corsin-Jiminez 2007; Forester J. 1992; Ouroussoff 2001; Thomas 1993).

Attentive to the ways in which ethnography has been recruited in the service of powerful organisations with, in some cases, consequent losses of critical faculty, anthropologists have recently begun to re-evaluate their codes of conduct. For example, recent controversies about the relation between anthropology and the military in the US have led to accusations

\[\text{10}\] The exchange value of the ethnographic text always did and in many cases, still does take the form of a rung on the ladder of an academic career which has a politics, a language and a mode of being all of its own, one often far removed from the ‘everyday lives’ out of which ethnography makes itself the transforming product. There is a politics to this too, which is often ignored. From this point of view, what is perhaps most welcome about ethnography’s escape from its disciplinary confines is an expansion in the spheres of exchange through which its products can circulate. This, in turn, necessitates vigilance about how ideas might be misrepresented as they are translated and transformed through various domains of interest. Nevertheless, in the best case scenario, increasing interest and communication outside the academy can lead to new forms of ethnographic writing and translation of taken for granted terms, making wider communication and engagement possible. This invites critical scrutiny from and engagement with various publics, creating a forum for critical debate with policy makers and others and increasing the likelihood of challenges to the questions of what an ethnographic analysis is good for and in whose interest a research problem is defined.

\[\text{11}\] Note, however, that ethnography has never been immune to charges of what amounts to colluding with the powers that be and it has never lost the stigma of being described as the ‘handmaiden of colonialism’ (Asad 1973).
that governments are attempting and, to some extent, succeeding in ‘weaponising’ ethnography (Price 2011). In response, strong academic resistance movements have developed, resulting, for example, in the wholesale review and restatement of ethical guidelines for members of the American Anthropological Association (AAA).

Unquestioned, then, and remaining beyond investigation, when ethnography becomes the means for counter insurgency at home or abroad, is the question of the relationship of domination itself such that ethnography, in effect, offers to the powerful a ‘political ontologisation’ i.e. a reassuring reification of the categories of reality, which define the mode of being dominant. Here the ethnographer becomes little more than a power-broker, serving the interests of the influential, and ethnography becomes, in this new kind of knowledge marketplace, less of a social scientific method geared to providing better explanations of human behaviour and more of an instrumental technique of control. As such, the exchange value of ethnography outside of academia is likely to rise and, in proportion, so will ethical concerns from within.

Initiatives by the Ministry of Defence in the UK to recruit anthropologists to various tasks, including the aim of modelling human culture for the military, are another worrying case in point. But how different is this kind of concern about ethnography and militarisation/state collusion from anxiety about corporate or other governmental applications of ethnography, where researchers are employed to analyse and explain the behavioural patterns and implicit value orientations of would-be consumers/national subjects? Here the mysterious collectives to be understood/mastered/mined-for-profit comprise either a group of desiring subjects - potential consumers/users of technological or other kinds of designed commodities - or groups of people identified, for example by government policy, as a specific social problem to be addressed. These groups too are vulnerable to ethnography’s new market-place promise to deliver to its clients, through the allusion to in-depth understanding, more efficacious manipulation and/or forms of control.

Indeed, if this is a methodological trend, one fitting for our surveillance and consumer-oriented futures, then it is important to ask whether new methodological prefixes such as ‘quasi’ really signify enough about what is at stake in current ethnographic trends.

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12 For example, in 2007/8 debates in the US about the Pentagon’s Human Terrain System (HTS), including prominent national news articles, led to the Executive Board of the AAA to issue a statement about ‘urgent ethical issues’ posed by the HTS project, urging its members to adhere to its code of ethics, but despite vehement opposition to anthropological involvement in HTS from leading American anthropologists, the Board declined to ban participating academics from AAA membership. Academic reaction was also strong in the UK against the post-9/11 PREVENT strategy which aimed to recruit universities to collude with the state in a surveillance operation to identify students at risk of ‘radicalisation’.

13 This paper was inspired by, and the term ‘political ontologisation’ is taken from, a position paper by David Mills and Richard Ratcliffe who organised a workshop in 2008 at the University of Oxford entitled: After Ethnography: anthropology, education and the knowledge economy.

14 This is part of the remit of anthropologists working at a senior strategic level in the UK for the Defence Science and Technology Laboratory (Dstl) in the Ministry of Defence.
Whilst Harper dismisses as ‘arrant nonsense’ (2001: 258) the idea that ethnography, to be ‘real’, requires learning through participation as well as close observation, many anthropologists would disagree. At this moment, an anthropological hard line, although extreme, might be helpful in provoking further debate. The definitional problem of what is happening to ethnography as it transforms in the methodological marketplace might be resolved if everything currently calling its self ‘ethnographic’, but which is not conducted by a graduate student of sociology or anthropology and based on long-term participant observation research, could be relabelled and repackaged as ‘observation research’. Indeed, many research consultancies, aware of the negative reputation that is developing around ethnography, are insisting on this differentiation for themselves:

Jane Fulton Suri, a leader of human-centered design at IDEO, employs [what would now be thought of as] ethnographic techniques, but she’s hesitant to label it as such. "We use a range of direct observational techniques, such as video capturing and shadowing. We also ask users to participate by carrying a camera around or taking notes."15

Of course, this solution simply displaces the problem, making it one of how to distinguish between kinds of observational techniques, but, for a while at least, there could be a moratorium, a reprieve for ethnography so that not just anyone could cash in by calling everything and anything they do for a business client, ethnography.

Conclusion

There is no doubt that ethnography has entered the commercial field and been celebrated for its capacity to yield value in the form of better appreciation of ‘brand ecology’ (Percy et al. 2001) or ‘managerially actionable insights’ (Elliott & Jankel Elliott 2003), but have things gone too far? Does the method now necessarily pose a danger to rigorous or critical thinking, transforming into a pale imitation of its former fieldwork self – a kind of quasi/pseudo/contrived ethnography cognisant (or not) of its own limitations? Or is the rising commercial utility of the method, as evidenced in the recruitment of on-staff ethnographers by Toyota, Sony, Intel, Microsoft and IBM, to name but a few, the vital sign of social science surviving, coming to terms with having to justify its existence in business terms and succeeding in relation to its capacity to make an ‘impact’?

Marking out what might be called control-ethnography, making it distinct from other, emerging quasi-ethnographic forms and comparing and contrasting them to what came first, namely the long-term fieldwork method, it becomes possible to consider a spectrum of qualitative and observational methods (Cunliffe et al 2009; Cunliffe 2009) and to make explicit what was rigorous and/or critical about ethnography as practiced by its conventional academic custodians in whatever discipline. This allows for reflection on how standards of rigour and critique might be preserved in the transforming versions of what ethnography is...

becoming. This has been my principal concern here: to begin to map out an approach to ethnography that recognises that there is no point trying to bolt the door after the horse has bolted; that militates against the use of the method as a technique of control; and yet that also moves beyond the vague assumptions of the past, which left even postgraduate students in the social sciences bemused about how they were supposed to learn intuitively how to do ethnography, as if it were a mystical rite of passage.

Testing the limits of what ethnography is, as it becomes a buzzword and gains kudos and commodity value outside of academia, provides an opportunity for academic appraisal of what is commonly understood to be distinctive about or defining of the method’s ‘reality’ and intellectual value. There is a chance to ask whether or not methodological skirmishes over boundaries matter and what is actually at stake in an ongoing turf war. In addition, a focus on what happens when ethnography is used instrumentally, in the service of businesses or governments, allows for a useful contrast between this and what might be defined as ‘actual’ ethnography of organisations as a specialist sub-field, either in anthropology or management science (Cefkin 2009; Neyland 2007; Schwartzman 1993; Wright 1994; Ybema et al 2009).

References


Evans G.


