

A Sum Greater than the Parts: Combining Contextual Inquiry with Other Methods to Maximize Research Insights into Social Transitions

Erin Leedy and Theo Downes-Le Guin, Doxus

Paper presented to the EPIC 2006 conference in September 2006

Introduction: Why Combining Contextual Inquiry with Other Methods Maximizes Insights into Social Transitions

Transitioning from “single” to “married” is a rite of passage for male adults worldwide. This transition often takes the recognized form of a marital engagement. The most prominent symbol of such an engagement in the U.S. is a diamond engagement ring, proffered to the woman as a symbol of the future union. Decisions related to selecting, purchasing, and presenting an engagement ring are momentous and personal—often completely foreign to the man prior to deciding to embark on the engagement journey. The path to engagement and marriage is clearly a personal transition, but is also linked to larger community and societal expectations as well as historical norms and traditions.

Companies involved in ring selection and sales, particularly those involved in on-line ring commerce, would benefit greatly from gaining insight into this transition experienced by potential customers. Specifically, what happens when Internet technology is inserted into the process? Can a place be created on the Internet that supports this transition? Using such insights, a company may provide support in the ring selection and purchase process that not only results in a sale but also helps to guide the customer through the process and results in a positive experience—the long-term benefits of which include customer satisfaction, loyalty, repeat business, and referrals to others in the ring selection process.

How is such customer insight most effectively gained when the research topic involves a deeply personal, societally-influenced and life-changing journey? We propose that a combination of traditional market research and applied ethnographic methods—contextual inquiry, observation, customer experience mapping, surveys—is the best approach for such a study. By drawing from the various strengths of each method, a large pool of information can be amassed that, when considered in total, paints a rich and comprehensive picture of the engagement journey.

Case Study Objectives and Approach

In this case study, the client commissioned research to explore opinions and experiences related to on-line and in-store diamond engagement ring shopping and purchasing. The research goal was to gain an understanding of the complex nature of engagement ring purchases, including both emotional and practical aspects. We developed the blended research approach to draw from market research, ethnography and participatory design methods in order to maximize insights gained within a very limited budget and timeline, as well as to gain acceptance among client stakeholders who had various levels of comfort with approaches outside the realm of traditional market research. The research approach that we employed included a series of 12 in-home sessions with men involved in the diamond engagement ring purchase process.

Complementary Methods: Combining Contextual Inquiry with Other Methods to Meet Specific Research Needs and Client Expectations, and to Maximize Insights Gained

The sessions included contextual inquiry along with other methods to meet specific informational needs. As Bjerén states regarding the use of a blended approach of qualitative and quantitative methods, the results are synergic. “Using them together nevertheless brings forth more nuanced and complicated knowledge about the object under study. The methods also reflect on each other and using them together...means that both qualitative and quantitative studies can be improved.” (Bjerén 2004:8)

As shown in Figure 1, the methods were drawn from traditional market research as well as ethnography and participatory design practices.

Figure 1: Methods Employed

Method:	Self-administered pre-visit survey	Contextual inquiry/in-home interviews	Observation of participants	Experience mapping	Researcher-administered survey
Drawn from:	Traditional market research	Applied ethnography	Applied ethnography	Participatory design	Traditional market research
Reason(s) for use in case study:	Introduce questions of a personal nature in a non-threatening format	Foster in-depth discussion of experiences and resulting emotions in the participant's environment	Learn about the participant's on-line research, shopping and ring selection experiences via observation	Obtain maps showing emotional high and low points throughout each participant's journey	Capture comparable importance ratings for on-line features

Self-administered pre-visit survey:

The intention of the self-administered pre-visit surveys was to “prime the pump” for the subsequent in-home sessions by encouraging participants to think about and describe the ring selection and purchase process, including steps they went through, how it made them feel, and where they currently are in the process. Gage and Kolari see the need for an introductory step in the research process before conducting applied ethnography or participatory design techniques. “The first step is to get research participants immersed in and aware of their daily experiences surrounding the area of focus. This brings latent daily experiences into their conscious memory.... After becoming aware of her experiences relative to a given subject, a person is ready to express associated emotions.” (Gage and Kolari 2002:4) Stappers, Sleeswijk Visser, and Keller agree that a pre-session exercise can be useful as a precursor to ethnographic and participatory sessions. “In the sensitizing phase, participants make ‘homework’ exercises...these exercises provide information to the researchers and designers, but also serve to draw the participant’s attention to the topic of the study: participants will then observe and reflect more about what they do in their personal life or during their work.” (Stappers, Sleeswijk Visser, and Keller 2003:2)

In this case study, the initial information was captured via a self-directed survey exercise, as early in the research process a self-administered survey may be received by participants as a safe, easy format in which to share such personal information. As Tourangeau and Smith have shown, self-administration of sensitive or highly personal survey questions results in a higher willingness to respond and to respond truthfully than interviewer-administered questions. “Self-administration can have marked effects on the responses obtained; by reducing fears of embarrassment or of disclosure to other household members, self-administration appears to increase respondent candor.” (Tourangeau and Smith 1996:277–282)

Here, the pre-visit survey was successful in having participants provide high-level information on the engagement decisions and steps they had taken, thus preparing participants for more lengthy and personal discussions of these topics with researchers during the subsequent sessions. Participants were willing to share strong feelings about the ring shopping process, particularly negative ones including: fear of selecting the wrong ring and disappointing the intended fiancée; distrust of sales people and disdain for the pressure they put on shoppers; feeling misled or “cheated” by on-line merchandise that didn’t live up to promises; abhorrence for the diamond industry and its dubious practices; and feeling very overwhelmed with the entire ring shopping process. The revelation of these strong feelings gave the interviewers material to explore further during the subsequent visits.

Applied ethnography—contextual inquiry and observation:

The use of applied ethnography in this study allowed for in-depth exploration of this shopping community while continuing to meet the client’s budget and timeline requirements. Applied ethnography has advantages in high-tech and other industry research as it is quicker, less expensive and can be less intrusive to participants than traditional ethnography which might take several months to years to complete (Sanders 2002:1–2). As Sanders describes, applied ethnography “draws simultaneously from a number of research methods. It listens to what people say, while

at the same time watching what people do and what they use. Applied ethnography is the best way to discover the difference between what people say they do and what they really do in their daily lives.” (Sanders 2002:2)

Contextual inquiry via in-home interviews. These interviews focused on the entire engagement journey that had occurred. Interviewers engaged the participants in discussions about their expectations, experiences, successes and setbacks, and emotions resulting from these experiences. We conducted the interviews in the participants’ home environments, where the on-line-related research and shopping experiences had actually taken place and thus feelings about these experiences could be conjured up more readily. Participants discussed the decision to become engaged and purchase a ring, initial research and shopping, ring selection and purchase (for those who had journeyed this far), and ring presentation to the intended fiancée.

Observation of participants. During the contextual interviews, participants were observed as they navigated through various on-line ring sites. The intention of this exercise was to have participants relive browsing, shopping, and ring selection experiences. This technique allowed participants to show researchers what they did, and also allowed them easy access to the feelings that accompanied the original behaviors. Interviewers acted as apprentices, and participants were the experts—teaching interviewers about the processes they went through and the accompanying feelings. Note that the focus of this study was on on-line shopping experiences, with a secondary focus on understanding the relationship to in-store shopping. Had the focus been on in-store shopping, actual in-store observation would have been merited.

Utilizing inquiry and participant observation, we were able to delve deeply into each participant’s emotional journey through the engagement process. Participants shared their feelings surrounding the decision to become engaged—a heady mix of excitement and anticipation around the ring presentation itself, confusion surrounding how to go about information gathering and shopping for rings, and an overwhelming fear of getting something wrong with the ring selection or the ring presentation.

It became clear how important a role the ring shopping resources play in the process, and how a ring merchant—whether traditional brick-and-mortar or online—may provide services and tools to assist customers through this emotional whirlwind.

Experience mapping:

Taking a page from the participatory design practice, we asked participants to create time-sequence maps of their individual diamond ring journeys showing all the steps they had gone through and the relative positivity or negativity of each step. Participants were encouraged to include the engagement decision, ring research, ring shopping, ring selection, and ring presentation in their maps as well as any other experiences that figured prominently in their journey. Participants then discussed the maps with interviewers so that each step and the accompanying emotions were shared.

Gage and Kolari state that participatory design techniques such as experience mapping allow people to express what they want in a product or experience—something that may not be expressed readily through interviews or surveys. “Participatory design assumes that users should play an active role in the creative process: users envision the future by identifying the defining moments from their perspective. These moments can highlight critical touch points and the desired feelings associated with them, which serve as a foundation for emotional connections.” (Gage and Kolari 2002:2)

During a participatory design exercise such as experience mapping or collage creation, discussion of the map or collage is even more important than creation of the artifact itself, as the meaning behind the artifact is discussed and shared with the research team. “The main emphasis is on the discussion after the collages are completed, not the collages themselves, which remain quite ambiguous...the sessions are very intensive and stimulating, and bring forward a list of considerations, anecdotes, opinions, observations, examples, motivations, practicalities.” (Stappers, Sleeswijk Visser, and Keller 2003:5) In this study, each participant became engaged in creating a map that depicted his journey, and even more engaged in sharing the story of the journey with researchers. Some participants actually seemed to find the process cathartic—they were able to share the low points of their journey with sympathetic listeners, with the knowledge that our clients would hear the stories and might someday be able to make things better for future shoppers. Creation of such a map allowed participants to really think through their engagement-related experiences from start to finish and brought to light accompanying emotional low points and high points that may not

have been accessible given a more straightforward interview approach, including an extreme aversion to sales pressure from in-store sales people, and bewilderment at the online ring research and shopping resources.

During analysis for this study, composite maps were created for on-line and in-store shoppers to compare experiences and identify pain points and areas of opportunity for the client. These resulting composite maps clearly brought to life the unique experiences of the different communities and highlighted areas of differentiation where the client may focus attention if trying to support one community or the other.

Researcher-administered survey:

At the end of each in-home session, interviewers administered a brief survey including scaled questions rating the importance of various on-line shopping tools and site features. Drawing from traditional market research, this approach allowed relative importance ratings for these features to be captured in a consistent fashion so that results could be compared across participants. Such analysis would not have been possible through contextual interviews, given the more fluid format and information gained. Though not the focus of the research, this component provided consistency in feedback related to the various on-line shopping features—an expressed desire from some of the client stakeholders who typically rely on traditional market research and wished to map results to established research metrics.

Results: Learnings and Insights Gained

The information gained from the variety of research methods employed did in fact paint a very rich, comprehensive picture of the journey toward engagement. The research resulted in great depth and breadth of information about the various steps of ring purchase—the research conducted and knowledge gained on diamond rings, the stores and sites visited, the rings purchased—as well as a view of the journey's emotional impacts.

As we learned during this case study, the shopping process for a diamond engagement ring is often viewed as an emotional or “sentimental” journey, and one that results in a story that becomes part of the couple's history. Even before the story exists, couples anticipate that it will be part of their shared history as presented to others, much as a couple may expect a few funny anecdotes from their first meeting and their wedding ceremony to become part of the personal history they pass along. Thus there's a need for the story of the engagement ring shopping process to be a good story, something that's worthy of sharing with friends, relatives, and even future children. This need for creation of a unique shared history is strong but often unspoken—it isn't openly recognized. And this need for sentimentality can greatly affect where someone will research and shop for the diamond ring; that is, the location and experience should ideally pass muster with the friends, relatives and children who will be sharing in the engagement story.

If the intended fiancée is involved in ring shopping, this may have some bearing on which shopping method is ultimately used: on-line or in-store. A woman's strong desire for a good engagement story—one that her family and friends will be delighted by, not disappointed in—may drive the man to purchase in-store to attain the more personal experience. Alternatively, a woman who places value on individuality or exclusivity may find appeal in a unique or customized ring. An intended fiancée with such values may be more open to ring purchase on-line. Even if the woman doesn't know about the ring shopping in advance, the male shopper often has a good idea of what she may or may not be comfortable with in terms of her engagement story, and he will shop accordingly.

In addition to insight on diamond ring shopping as a sentimental journey, we explored the unique needs of in-store and on-line diamond ring shoppers. As the research showed, these communities are two different breeds altogether in terms of their approach to and expectations around ring shopping.

- Those who prefer to shop and buy in-store have strong desires for an in-person experience, interacting face to face with a salesperson or diamond expert and interacting directly with the rings. These shoppers want to have conversations with experts to build trust and rapport. They want to feel good about whom and where they're buying from. These shoppers also want to touch and feel the rings, to see the diamonds sparkle in the light, all to get a better mental picture of what the rings will look like when worn by the soon-to-be fiancée. The journey here focuses on having a more “personal” experience. The lack of personalized service and ability to see and touch the merchandise make on-line shopping a less desirable or even unacceptable path for these shoppers.

- On-line shoppers are drawn to the lower pressure of self-guided research and shopping (as compared to envisioned high-pressure sales in a store setting), along with the assumed larger variety of diamonds and settings available. These shoppers tend to dislike in-person interaction with salespeople, viewing it as overbearing and high-pressure. The journey here focuses on control—selecting the right ring at the right price via self-directed shopping, with the shoppers controlling their entire journey.

Knowing the unique preferences and aversions of each community, a company involved in ring selection and sales may develop a store presence and supporting ring shopping materials and services that cater to one community or the other.

Implications

This case study highlights ways in which unique benefits can be gained from traditional market research and ethnographic methods, leading to insights such as those detailed here. The market research components of this study provided both a way to introduce a sensitive research topic to participants in a non-threatening manner, and a way to capture information in a consistent, comparable fashion for high-level analysis. The ethnographic and participatory design components of this study provided rich information on the participants—delving into their hopes, fears, successes, failures, aspirations and many other emotionally-charged topics.

Additionally, the blended approach was effective in introducing ethnographic methods to some client stakeholders more familiar and comfortable with traditional market research methods. While a pure ethnographic approach for this research may have been rejected due to a lack of comfort from all stakeholders, this blended approach was embraced readily. As the project was ultimately deemed successful in terms of insights gained, this may well open the doors to future opportunities for ethnographic research among these client stakeholders, including the possibility of pure ethnographic approaches when they are merited.

For a project focused on a deeply personal, societally-influenced and life-changing journey such as diamond engagement ring shopping, we feel that a blended research approach that draws from both traditional and ethnographic techniques will prove highly successful. From the client perspective, the insights derived from such a blended project allowed greater understanding into this life journey and highlighted ways in which the client might best support the various steps in that journey for current and potential customers. Any company involved in new product development, purchase channel or service development could benefit from such an approach if the product or service in question engages the emotions in a similar way. We look forward to the successful employment of such blended approaches in the future as we continue to support clients in researching the ever-growing technology sector.

References

- Bjerén, G. (2004). Combining Social Survey and Ethnography in Integration Research: An Example. *2nd Conference of the EAPS Working Group on International Migration in Europe*. Rome: Institute for Research on Population and Social Policies.
- Gage, M. & Kolari, P. (2002). Making Emotional Connections Through Participatory Design. *Boxes and Arrows*. Retrieved 12 April 2006 from http://www.boxesandarrows.com/view/making_emotional_connections_through_participatory_design.
- Sanders, E. (2002). Ethnography in NPD Research—How “Applied Ethnography” Can Improve Your NPD Research Process. *PDMA Visions Magazine*, October 2002. Retrieved 15 April 2006 from <http://www.pdma.org/visions/apr02/applied.html>.
- Stappers, P. J.; Sleeswijk Visser, F.; & Keller, I. (2003). Mapping the Experiential Context of Product Use: Generative Techniques Beyond Questions and Observations. *6th Asian Design International Conference: Journal of the Asian Design International Conference*. Tsukuba: Institute of Art and Design, Univ. of Tsukuba.
- Tourangeau, R. & Smith, T. W. (1996). Asking Sensitive Questions: The Impact of Data Collection Mode, Question Format, and Question Context. *The Public Opinion Quarterly*, 60 (2), 275–304. Oxford: Oxford University Press.

Published as "A Sum Greater than the Parts: Combining Contextual Inquiry with Other Methods to Maximize Research Insights into Social Transitions" by Erin Leedy and Theo Downes-Le Guin, *EPIC 2006*, pp. 41–48, ISBN 1-931303-30-4. © 2006 by the American Anthropological Association. COPYING AND PERMISSIONS NOTICE: Authorization to copy this content beyond fair use (as specified in Sections 107 and 108 of the U. S. Copyright Law) for internal or personal use, or the internal or personal use of specific clients, is granted by the University of California Press on behalf of the American Anthropological Association for libraries and other users, provided that they are registered with and pay the specified fee via Rightslink® on AnthroSource®, <http://www.anthrosource.net/>, or directly with the Copyright Clearance Center, <http://www.copyright.com/>.