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By Joachim B. Lyon

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An Ethnographer of Design Reflects on Design Ethnography

BALANCING THE EMIC AND THE ETIC

On a sticky-hot morning in southern China several summers ago I was perched on a small black plastic stool behind a Chinese fashion designer who had been working for two hours on a scrapbook of magazine photographs and pencil sketches for the fall line. My left leg was asleep. I was continuously struggling to keep myself stable in that crouched position in order to take detailed field notes but remain unobtrusive enough so as to not distract the designer, who had agreed to my presence. A partially defunct air conditioner rattled rhythmically in the background, ineffective against the weight of summer.

I briefly reflected on my notes for the day and tried to push away a knot of impatient frustration. That day, I knew, would be just like the previous day and the day before that: My notes would describe fashion designers spending hours on the Web downloading and categorizing runway pictures, browsing print articles on shows in countries they would never have a chance to visit, fiddling with swaths of fabric samples and once in a while drawing a perspective sketch. And my notes on the designers' accounts of these activities would repeat themselves like a broken record, the same answer to my question every time: "These are so I can convey my meaning to others, to the patternmaker and to the artistic director."

Not that all this was particularly uninteresting—but I had learned Chinese, crossed the Pacific and negotiated my way onto this high-design floor with the intent purpose of "studying design practice in situ." *In situ* means "in its original place." Ethnographers use the term to contrast their work with laboratory studies, in which informants are often observed out of their natural context. Now, faced with the

very in situ practice I wished to document and understand, I was disappointed in, and confused by, the seemingly disproportionate amount of time the designers spent doing such hunting and gathering activities.

Where was the real design action? Where were the prototypes and inspiration, the conflict-filled moments of raw creation where new garments would come to physical life? I had subtly bragged to the other first- and second-year students in my Ph.D. program at Stanford—themselves excellent budding ethnographers in the domain of work and organizations—that mine would not be another drowsy ethnography of software coders or mechanical engineers. Yet for all the excitement I had predicted, design practice in situ was turning out to be rather mundane. Not only did design work appear to be repetitive, solitary and unromantic, but the designers often disappeared altogether from the design floor at random intervals during the day, leaving me alone with my pen and notebook. Bitterness crept up in me: Where are they? Don't they know there's an ethnography going on here?



Finding the Sweet Spot

The ethnographic approach is a tricky thing. No two studies are truly alike in their process, though they are often made to appear to be so when formally pitched to industry stakeholders or written up in the methods section of academic articles. In truth, whether aimed at innovative and frame-breaking product development or top-tier academic journals, the practice of ethnography is a trademark of exploration at the horizon of common understanding. It is a frontier praxis, and it carries with it the fundamental tension of such exploration: How do you remain naïve to possible new truths yet relevant to a necessary audience?

The fundamental epistemology of ethnography involves a bottom-up induction toward abstract models; ethnographers often call it grounded theory building. What makes it grounded is an emphasis on building *emic* ontologies. That is, what we want to know most is how informants carve up and make sense of the world as they do; we want to discover the implicit categories and categorical relations inherent in their world view, not our own. Taking an emic approach implies entering the field and engaging informants with as few preconceived notions as humanly possible.

But ethnographers still have to start somewhere. It is impossible to proceed without any frame, process or order whatsoever, both in industry and the academy. Ethnographers must at least minimally bound their study within some guiding analytical perspective of their own—a minimal *etic* view. If not for any other reasons, this is true because they must select field sites and secure access, they must decide which informants to talk to and which activities to watch more closely, they must work within the available project time frames, and they often have to justify all these choices to authorities, stakeholders and funding sources.

The emic–etic balance—that balance between an informant’s internal organization of their world and the ethnographer’s external organization of the informant’s world—presents *the* critical challenge to industry and academic ethnographers.

Audiences and practical considerations constantly pressure the ethnographer to formulate and solidify an etic stance; yet only a sufficiently emic approach yields the most valuable discoveries, especially those that run counter to the audience’s common sense. Successful ethnographic projects find, often in a wandering fashion, an analytical sweet spot between emic and etic needs: They are fundamentally emic in their receptivity to whatever the field and informants’ perspectives teach them, however surprising or contrary, but they are just etic enough so as to render the findings relevant to the interests and needs of the ethnographer or those the ethnographer represents.

My frustration after weeks of observations on that fashion floor in southern China represented a growing concern that perhaps I was fundamentally missing that balance of “mostly emic and just enough etic.” Once in the field, and effectively burning through hundreds of dollars of budget a day, it took me over half the total time I had available before I realized what I had done wrong.

As I entered the second month of observations, the designers became considerably more frantic. Frowning, they walked hurriedly on and off the floor. They didn’t chat as much with each other; when they did chat, they sarcastically batted around dark humor. I learned that all the design prototypes would be subject to impending *kanyang* meetings—reviews by the artistic director, who they referred to as “Miranda” from the American film *The Devil Wears Prada*. As the day of judgment drew near, an event occurred on the floor that changed my research approach for the rest



of the summer. A patternmaker had come downstairs from the pattern-cutting workroom and was having a heated discussion with a designer. They both were handling a cotton shirt that was draped over a half-body mannequin. The designer was gesturing furiously, eyebrows fretted in frustration: "This is not how I specified the clothing! Why is it changed?" The patternmaker sheepishly replied, "I thought the other way didn't look good, so I changed it." Looking at him with an expression of exasperation and disbelief, the designer gripped the corner of her garment, yanking it at each emphasis in her response: "No one said to change it! If no one says to change it, don't change it!"

The most interesting aspects of systems, both human and technical, tend to reveal themselves when the system is under uncommon pressure. Fashion design was no exception. The pressure of the review period revealed that the most critical aspect of design-work articulation, for these designers, was in their relationship with the patternmakers. Unlike in other parts of the world, these Chinese fashion designers were only superficially taught how to cut patterns in school. In the workplace, they were thus highly dependent on the patternmakers, not only to produce the final garment prototypes for review but also to help them think through the tangible material ramifications of their otherwise abstract designs.

I began following the designers when they left the design floor and discovered that they visited their assigned patternmaker almost every day, sometimes spending hours there, and often in debate. In nearly every observed instance of designer–patternmaker interaction the designer would examine a cheap muslin cloth prototype and lament, "This is not the feel I was going for." Then the designers would marshal a constellation of evidence with which I was already more than familiar—magazine photographs, bits of fabric, rough 2D sketches—to desperately try and communicate the spirit of their designs. Patternmakers usually reinterpreted this media, countering that a certain idea or feel simply would not be physically possible. Sparks flew when designers felt the patternmakers were not acting in good faith.

As I began to learn about these intense interactions, I realized that in my attempt to logically frame my summer study up front I had built crippling assumptions into the very grammar of my relatively open-ended proposal. In propos-

ing to study design practice in situ, it turns out that I had a preconceived notion of where that was—the design floor—which in turn engendered an incorrect notion of what that was—the mundane hunting and gathering of photographs and fabric. During observations on the design floor and during formal and informal interviews, I never thought to probe further when designers mentioned who they were showing their designs to off the design floor. Without knowing it, I had already decided that such activities were outside the bounds of what, for my purposes, counted as design work. Indeed, I was arguably open to any activity I observed on the design floor, but it turned out that the most important design activity was not there at all. And what activity did occur on the design floor seemed terribly boring until understood in the context of the designers' dependence on and negotiation with the patternmakers. Designers expended so much effort hunting and gathering such media in order to ensure high-fidelity communication of their concepts to the specialists they depended on for the physical realization of their designs.

Dangerous Formalisms

In the years since I visited the fashion floor, my career as an ethnographer of organizations has remained tied to the design world, but in an ironic twist of fate my current work involves ethnographic studies of design consultancy organizations that are themselves engaged in ethnographic practice. In one sense, I feel entirely at home studying design ethnography. I first encountered such methods as an undergraduate at the University of California, San Diego, in the cognitive science department whose founding chair was Don Norman, a cognitive psychologist and author of *The Design of Everyday Things*. The department encouraged us to simultaneously apply ethnographic methods in ways that would suit both academic and industry constraints. Electives in user-centered and user-experience design were staples for most students at the time.

Yet there is one sense in which I find myself a fascinated foreigner to the challenges of design ethnography in industry—namely, the way in which the presence of clients or other stakeholders impact the emic–etic balance. When I reflect on the crisis of method I faced on the fashion floor, the most important takeaway was the ease with which the etic can subvert the emic. **Even with an intentionally open mind, my proposed method carried with it what philos-**



ophers call a “suppressed premise” about what design work was and where it occurs. My conception of work in the design world, with its effect on my ethnographic method, preempted any chance of my discovering the design world’s own conception of its work.

How does industry differ? By comparison, design ethnographers, because of client and stakeholder interactions, face much more pressure to develop a strong etic stance than I ever encountered in my own fashion study. Most industry clients and stakeholders—especially those in developing markets, such as China—are acutely uncomfortable with what the ethnographic approach appears to be: a massively idiosyncratic, inductive jump from ethnographic user research to project deliverables, such as value frameworks or product concepts. Interestingly, design ethnographers and the organizations that house them respond to this challenge by codifying and formalizing their method into an ideal-type stepwise process (often named the “XYZ Innovation Process”), which presents a rigidly procedural and highly logical view of ethnographic analysis. This formulation, often visually manifested in line-and-box process diagrams, certainly helps at the front end for buy-in and in the back end for justification of the deliverable (and usually along the way, too). And design ethnographers tend to feel that educating clients with these process models is a critical step to building an overall healthy client relationship.

But therein lies the rub. These formal process models of ethnographic analysis may be critical to client relations, but they lead dangerously close to an over-etic ethnographic method. If not anything else, I learned on the fashion floor that a basic research process itself houses a system of assumptions, and these assumptions may completely build out the possibility of certain discoveries. Ironically, the stakeholders at the frontier of a market who most need a frame-breaking discovery are often the least amenable to the emic-etic balance necessary to make such a discovery. Design ethnographers are constantly faced with this contradiction. How have they responded?

In my own research into organizations, teams and schools that employ design ethnography, I've observed two general processes. In one scenario, because of the client and stakeholder context, the etic approach becomes largely predominant. The grounded user-centered nature of work in such firms becomes more nominal than substantive because the need to easily interface with clients drives the ethnographic research itself. In fact, the designers come to believe in and enact the formal linear ideal-type models they sell to the client.

In another scenario, the etic approach dominates rhetorically in order to protect the emic fundamentals, which continue, under the radar, to undergird the actual design ethnography. In the parlance of organizational theory, this situation represents a decoupling between the core design work and the peripheral boundary-spanning work with the client. Organizations that do design ethnography generally find that this sort of client situation is extremely difficult to maintain. On the one hand, they follow the open-ended principles necessary to extract value from ethnography. On the other hand, they "meet milestones," submit incremental "reports" and carry out a million other overhead pleasantries in order to satisfy client expectations based on the formal process model, even if these tasks have nothing to do with, or even interfere with, the actual design work. The dissonance and frustration experienced by design ethnographers in these situations is considerable.

There is, of course, a third way. Design organizations with no intention of taking a rigid etic stance can educate their clients in the method and value of the ethnographic

approach. Sometimes this works. The chief difficulty here is similar to all instances of organizational co-optation: Attempts to bring necessary strangers into the fold often change the nature of the fold itself. As in the first scenario, the ethnographic process becomes rhetorically formalized to be more palatable to clients but then is substantively adopted by the designers themselves. This is not uncommon at all. Design ethnographers, like all ethnographers, face the anxiety of true open-ended fieldwork; a tractable and clear process model (usually five to seven steps, or whatever fits on a sheet of paper) becomes a useful psychological crutch but a crippling escape in the long term.

In sum, **it seems that the best way to sell an ethnographic approach—rationalistic formalization—is antithetical to the best and most valuable ethnographic practices.** Design ethnographers either lean toward the formal model and unwittingly lose their ability to innovate or they operate behind its rhetorical crest, suffering the overhead and dissonance that result from playing two games at the same time. Design ethnography puts designers in a fundamentally unstable position, which they must continuously negotiate and renegotiate within and across projects.

Yet, when I observe design ethnographers in action, I can't help but feel that this lack of stability is appropriate. In the academy as well as industry, the relationship between the ethnographer and the ethnographer's audiences has always been unstable because it is precisely the ethnographer's job to unearth perspectives and behaviors that cannot be imagined while sitting in the armchair, laboratory or boardroom, and then communicate such unbelievable perspectives to those sitting in armchairs, laboratories and boardrooms. The ethnographer has almost always had to uncomfortably balance an emic truth with an etic gloss—the open-ended inductive discovery packaged as a rational account of the very same discovery.

That ethnography has recently entered industry and become subject to industry pressures only emphasizes the difficulties in that balance. In this sense, product design ethnographers know as well as, if not better than, any academic ethnographer the degree to which ethnography is, and will remain, the basic frontier praxis. ■



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