



SELF-ETHNOGRAPHIC APPROACH

AUTOETHNOGRAPHY

Researchers explore a particular experience themselves and self-document this using field notes, audio recordings, videos, and photographs; also called self-ethnography/documentation.

Duration	<p>Preparation: 0.5 hours–2 weeks (depending on approach and accessibility)</p> <p>Activity: 1 hours–12 weeks (depending on research aim and approach)</p> <p>Follow-up: 0.5 hours–2 weeks (depending on amount and type of data)</p>
Physical requirements	Notebook, photo camera, voice recorder, video camera, mobile ethnography software (optional), legal agreements (consent and/or confidentiality agreement)
Energy level	Middle
Researchers/Facilitators	Minimum 1 (depending on approach, up to approximately 15 researchers)
Participants	n/a
Expected output	Text (transcripts, field notes), audio recordings, photos, videos, artifacts

“Real” (i.e., rather academic) autoethnographic research might involve researchers immersing themselves for months within an organization. In service design, we often use a short version of this: team members explore a particular experience themselves in the real situational context, mostly as customers or as employees.⁰¹

Autoethnography is often one of the first research methods undertaken as it helps researchers to interpret behaviors they will see when they observe participants. Also, it helps researchers to conduct interviews more easily and comprehensively when they already have a rough understanding of the subject matter.

Autoethnographic research can be overt or covert. When you do overt autoethnography, people around you know that you are a researcher, while a covert approach means they do not know. When researchers are visible to the people around them, it is important to be aware of a potential “observer effect” – the influence researchers have on their environment and on the

⁰¹ For a more comprehensive introduction to how autoethnography can be used as a qualitative research method see, for example, Adams, T. E., Holman Jones, S., & Ellis, C. (2015). *Autoethnography: Understanding Qualitative Research*. Oxford University Press.

research participant's behavior simply by being present.

Autoethnography can include any on- or offline channel as well as actions with or without other people and/or machines. Often, autoethnography is useful as a first quick research method to understand cross-channel experiences. It can also focus on one specific channel, such as the online channel, zeroing in on a detailed experience within a journey map. In this context, the research method of autoethnography blends in with online ethnography.

Step-by-step guide

1 Define specific research question

Define your research question or what you want to find out. Consider why you are doing research (exploratory vs. confirmatory research) and what you want to do with your findings (personas, journey maps, system maps, etc.).

2 Plan and prepare

Based on your research question, define when and where you

will conduct your research. For autoethnographic research involving a group of people, such as mystery shopping/working or (explorative) service safaris, plan who you want to include as researchers, how you will approach them, what expectations you will set, how you will give instructions, and how much time you will need. For interventions like service safaris in particular, it is important to consider who to include from the client side or from other departments involved in the project.

Decide if you'll do overt or covert autoethnography and how you will document your experiences, and set up legal agreements if necessary to take voice recordings, photos, or videos, in addition to your field notes.

3 Conduct autoethnography

During autoethnography, try to distinguish between first-level and second-level concepts. First-level concepts ("raw data") refer to what you (objectively) see and hear, while second-level concepts ("interpretations") refer to how you feel or how you interpret what you experience.

If you take field notes, write up both separately: for example, on the left page what you see and hear and on the right side how you interpret this and how it feels. If you conduct overt autoethnography, be aware of a potential observer effect. The length and depth of autoethnography varies with the research objective: from a very quick five-minute experience at a specific moment in a journey to research over several days, or sometimes even weeks or months.

4 Follow-up

Write up your individual key learnings from the observations right afterwards, and if other researchers did autoethnographic studies as well compare these. Keep track of all your collected data by indexing your field notes, transcripts, photos, audio and video recordings and collected artifacts. Go through your data and highlight important passages. Write a short summary that includes your combined key findings as well as raw data to exemplify these, such as quotes, photos, or videos.



Variants

Besides comprehensive autoethnographic research, there are different, shorter ways to use autoethnography in service design:

- **Mystery shopping** is one way to do autoethnographic research: researchers act as customers and follow a purchase process or a specific customer experience, and self-document their own experiences. Often in mystery shopping, the mystery shoppers are assigned certain tasks – for example, to challenge a service, or to evaluate a service based on a checklist. Mystery shopping is therefore an approach often used for more evaluative research. A criticism of this approach is that mystery shoppers often only pretend to be customers and are not real customers. This affects their expectations, their needs, and ultimately also their experiences, resulting in biased data.
- **Mystery working** is performing autoethnographic research as an employee in a company. Unlike “real” autoethnographic research, mystery working refers to researchers spending only a limited time disguised as an employee in a company. Like in mystery shopping, researchers document their own experiences (e.g., going through an application process or a work day). Often, this also includes certain tasks – for example, challenging colleagues – or check lists to go through. Mystery working is subject to the same criticism as mystery shopping, based on the fact that researchers only act as employees and often spend very limited time in a company.
- A **service safari** is often used as an intervention. The term describes sending out a group of people to do autoethnographic research regarding a particular experience. While they are experiencing a specific product or service on their own, they are often also asked to observe and talk to other customers (see participant and non-participant observation, contextual interviews). The aim is to immerse oneself in an experience, to “go out into the wild,” to explore a subject matter on your own, to observe customers “in their natural habitat,” and to “hunt for insights.” Documenting your experience and observations with photos and/or audio or video recordings is very useful for subsequent discussions with your peers. A service safari is really powerful as an intervention when it includes people from management, from the client, or from various departments, as it often helps participants gain a common understanding of a specific issue, building on a contextual bottom-up approach instead of a rather abstract description of an issue.
- As opposed to a conventional service safari, an **explorative service safari** refers to sending out a group of people to explore and collect some examples of what they think are good and bad service experiences. Usually, explorative service safaris do not have a particular focus or have a rather wide focus. For example, they can have a company focus to experience services provided by your client or your own company, an industry sector focus to experience services

offered by your competitors within the industry, or a focus outside of your industry to look for examples in other industries that can provide inspiration for your own services. Although explorative service safaris are less useful to collect data for a specific research project, they often help teams find starting points for their own research or decide what to focus on in later research.

- **Diary studies** are longitudinal studies in which participants describe their own experiences regarding a subject matter over a longer period of time. Data collection and analysis can be done by researchers themselves as autoethnographies. Alternatively, researchers can invite participants to collect data themselves in a diary and then analyze the data. Often, diary studies are part of cultural probes or they are combined with in-depth interviews based on the diary. Diary studies can be done with a classic physical diary, or online with diary study software, or on smartphones optionally with diary or mobile ethnography apps.

Method notes

- A smartphone is often the best device to take with you; if you aim to create journey maps, consider using a mobile ethnography app to directly document your experiences as a journey map.
- Depending on the country and organization you're working with, do not forget to check what kind of legal, ethical, and confidentiality agreements you need up front and, if necessary, communicate them in advance to your research participants. ◀