Toward Improved Ethnography for Transnational HCI

Samantha Merritt
Indiana University School of Informatics and Computing
901 E 10th Street, Bloomington, IN 47408
sasumerr@indiana.edu

ABSTRACT

Through a feminist critique of the ethnography method and the use of reflective HCI and global ethnography methodology, in this paper I will provide a discussion of methodological challenges for transnational design research using ethnographic methods. This discourse is meant to explore potential adjustments to HCI's common use of ethnographic methods; specific attention is given to transnational HCI user research. This paper will show, through the discussion of feminist standpoint theory, critical reflection, and a global ethnography framework (that of Gille and Ó Riain), that there is room for improvement in HCI's appropriation of ethnographic methods and that the problem space of transnational HCI would benefit from an ethnographic practice with specifically tailored frameworks and epistemological positions.

Author Keywords

Ethnography, reflection, feminism, critical theory, methodology, reflective design.

ACM Classification Keywords

H5.m. Information interfaces and presentation (e.g., HCI): Miscellaneous.

General Terms

Theory

INTRODUCTION

Certainly, ethnography has become a common method of user research for any HCI design work and is prevalent particularly in cross-cultural and transnational design research. Ethnography, a method notably transplanted from anthropology to HCI with the work of Suchman in 1987 [19], became a common method for computer supported cooperative work a decade later. Now with field research for transnational design projects becoming more common and also due to the cultural turn in HCI design research, there is a vibrant discourse about the proper application of ethnography in HCI [6, 20, 16, 7, 9]. While Crabtree, et. al., believe that ethnography in HCI research should only be used according to the former status quo—in the form of

rigorous, empirical situated action observations [6]—transnational researchers are calling for (and creating) methodological research tailored to the cross-cultural HCI professional [20, 9, 11, 16].

The cultural turn in HCI challenges more than just methods; it also challenges the very epistemologies that HCI designers use when going about the practice of design. There has been a call for an agenda to use critical approaches to examine the way our field will address design methods and research now that technology design touches nearly all parts of human life all over the world [4]. Relevant for the transnational HCI problem space, critical work from feminism [1, 2], reflection [18, 5, 3], and postcolonialism [12, 13] have recently contributed. Of course, there has been much more work in cultural and critical HCI, but those are out of the scope of the present paper.

An implicit assumption in the discussion of research methodologies is that most transnational HCI researchers conduct research according to the common HCI application of rapid or adapted ethnographic methods (as opposed to rigorous classical methods from the humanities). An introduction to the epistemological positions used in this critique and discussion is necessary to frame the primary concerns. Through a feminist critique of the ethnography method, in this paper I will provide a discussion of methodological challenges for transnational design research using ethnographic methods. Making use of feminism and critical reflection, I will explore adjustments to the common use of HCI ethnographic methods, specifically for transnational HCI professionals.

POWER AND POSITION IN DESIGN

"Design is, by definition, a *service relationship*.... Design is about *service on behalf of the other*." [15] Nelson and Stolterman argue that there is a difference "between designs that are done *with* clients and those that are done *at* clients. In the latter case... meaning is discovered through persuasion or through the experience of use. There is also intentional change that is done *to* people." [15] In transnational projects (specifically those involving development goals), it is not uncommon for technological development to be implemented *at* clients causing change *to* people. That change is not necessarily bad (or good), but the power relationship between the technology provider and the receiving communities is typically unequal throughout the design and implementation process—likely because

much transnational design flows from more technologically developed cultures to less technologically developed cultures. For example, at a recent World Summit on the Information Society, delegates from developing countries expressed concern that adopting technologies without actively participating in development could easily reinforce their nations' already low cultural value chain position. [11]

Designing for the transnational HCI arena presents challenges of power relationships each time a researcher negotiates his/her position relative to a user population and its comprising cultures or nationalities. Of course, unilateral relationships between designers and users can form in any design project because the designer is always in a privileged position of decision-making and resource control as they shape a design for distribution to *any* sub-culture, culture or set of cultures. In transnational HCI work, the unilateral power relationship vexes most user field research methods because the conditions of cultural difference are often so extreme.

Well suited to challenge power relationships, feminism has been recently embraced by HCI as a useful critical discipline. [1, 2] Bardzell has proposed that feminist theories could contribute to HCI in theory, methodology, user research, and evaluation. She introduced a set of feminist interaction design qualities for design and evaluation. For the purposes of keeping the background explanation brief, refer to [1] for a more complete exploration of feminist theory and feminism in HCI.

Feminist Epistemology
Specifically, this critique will take inspiration from feminist standpoint theory. Bardzell succinctly explained that feminist standpoint theory "attempts to reconfigure the epistemic terrain and valorize the marginal perspectives of knowledge, so as to expose the unexamined assumptions of dominant epistemological paradigms, avoid distorted or one-sided accounts of social life, and generate new and critical questions." [1] The dominant epistemological paradigms, in transnational research contexts, are those of the designers—conducting field research to understand the epistemological paradigm of another, usually very different, set of people. The goal, according to this view, is to use the knowledge paradigms of a user group's culture to bring light to design researchers' assumptions and create unique questions and insights for design. This explanation sounds reminiscent of defamiliarization, an essentially reflective design strategy popularized in HCI by Bell, et. al. [3] and is not unlike other reflective strategies that HCI designers already use [18, 5].

Bardzell states that the feminist standpoint epistemology gives way to a new category of user research for the "marginal user." [1] It is from this insight that I proceed with a critique of conducting ethnographic research to learn about the marginal user. The marginal user is not necessarily a gendered distinction; marginalization could be

along any feature of socioeconomic, racial, cultural, or other social construction of difference.

Caution is required here not to slip into a dichotomous position of marginal/non-marginal user; there is no clear binary opposition, and to operate as such is overly simplistic. This is similar to the controversial insider/outsider debate in ethnography—the concern over the native, subjective view or the external, objective view in research where a researcher is investigating a culture different than his/her own. This is the essence of the crux in the current HCI ethnographic method discourse. Crabtree, et al., argue for objective, empirical observations for use in HCI design—an essentially outsider position for an ethnographer. [6] Dourish argues the essentially opposite position: for an explanatory, analytic result from more traditional humanities-rooted ethnographic methods and analysis—villainizing empirical-only ethnographic reports. [7] Naples asserts that "outsiderness and insiderness are not fixed or static positions" in any ethnographic research and that an ethnographer's position in either category is never complete and membership to a category is negotiated according to particular interactions. [14] Feminist standpoint perspective seeks to challenge and remove the binary distinction of the insider or outsider and give voice to as many positions, or standpoints, as possible.

After illuminating the designer-user power imbalance and a brief introduction of standpoint feminism, now I focus attention on the discourse of ethnography in HCI and what feminist standpoint theory can add for a transnational HCI user researcher.

ETHNOGRAPHY AND REFLECTION
Ethnography, the methodological practice of positioning a researcher within a group of people to study and analyze a social phenomenon, is challenged by the globalizing nature of transnational HCI because "it loosens the embeddedness of social relationships in individual geo-spaces." [11] That is, geo-spatial boundaries are no longer clear and are no longer necessarily linked directly to social relationships. Essentially, globalization has made conducting ethnography difficult because the sense of space is no longer clear. A transnational HCI researcher is naturally biased to view others' interactions through his/her own culture's epistemological paradigm. Further complicating the issue, what if the researcher is researching several cultures or nationalities different from his/her own? What if there are shared communication or culture but varied hierarchical power relationships among those groups and the researcher's originating culture?

To begin to resolve these concerns, Hakken draws from the work of sociologist global ethnographers Gille and Ó Riain, who argue "ethnography can strategically locate itself at critical points of intersection of scales and units of analysis and can directly examine the negotiation of interconnected social actors across multiple scales." [10] Interestingly,

through the use of the scale and unit metaphor, the multiple viewpoint approach suggested by Gille and Ó Riain is much like that presented in standpoint feminism—if these critical points of intersecting scales and units can be mapped to varied epistemological paradigms and knowledge.

Multiple Standpoints in Ethnography

Building upon this advantageous similarity in approach, it is useful to look at what Gille and Ó Riain consider useful units of analysis and scale. First, before units of analysis or scale are considered, Gille and Ó Riain argue that ethnographers must engage in "place-making." Ethnographers should approach with the idea of creating an imagined, practical sense of place "that still locates itself firmly in places but which conceives of those places as themselves globalized with multiple external connections, porous and contested boundaries, and social relations that are constructed across multiple spatial scales." [10] The subsequent (imagined) place created by the ethnographer, then, becomes the location of investigation. The ethnographer then has tools to examine what features make it a cohesive place through exploring the "hetearchical social structures and deeply intertwined scales of social life." [10] Those structures and scales can be explored along: *global forces* (forces beyond the influence of social actors being studied such as capitalism, modernity, or science), *global connections* (focused on social actor agency and the strategies used to create a sense of place, such as migrant workers), or *global imaginations* (focused on the discourse of local social actors actively discussing globalization in some way, such as a public debate over a joining the European Union). [10] The goal then, is for the ethnographer to choose a global cluster (force, connection, or imagination) and explore how particular outcomes became threaded through the "place" of study.

This concept of place-making (creating a place and exploring the threads of connections) is an interesting, and potentially useful, one for a transnational HCI researcher and in line with the feminist epistemological position of adopting multiple viewpoints (multiple physical places with social actors) when conducting an analysis. This concept, while enabling of multiple views, does not explicitly consider the position of the researcher or how to handle uneven power relationships. "How we negotiate the power we wield and the resistance we face in fieldwork depends strongly on the reflective practices we employ. The reflective practices we employ are, in turn, influenced by what we understand as a "standpoint" and how we assess our positionality in the field." [14] Restated, to improve understanding and promote power balanced relationships, ethnographers should define positions from which to conduct investigation and subsequently engage in reflective practices.

This feminist practice of defining standpoints is not unlike the three clusters Gille and Ó Riain use to begin global ethnography; both frameworks call for defined positions

from which to conduct investigation. Naples identifies three dimensions of standpoint epistemology: "as embodied in social identities, as a communal or relational achievement, and as an axis point of investigation." For each dimension, an ethnographer should "explicate how to treat *experience* and negotiate shifting intersections of race, class, and gender as well as account for changes over time in social, political, and economic context." [14] Both the feminist and the global ethnographer positions offer multidimensional frameworks as strategies for ethnographic investigation. Comparing the two frameworks, both sets of three dimensions do not exactly agree in dimensional qualities, but may produce similar analysis where global forces and axis point of investigation are concerned.

Though Gille and Ó Riain present a useful framework for transnational ethnography, they acknowledge that there is a great potential for contradictory and conflicting relationships between researchers and the issues and people being researched. "There is no easy answer to the dilemmas of power in global ethnography—if anything, it is less clear for whom the ethnographer should speak…" [10] Using standpoint theoretical frameworks, ethnographers using *reflective practices* can resist reproducing inequalities [14] and ignoring the difficult relationships between researchers and the issues and people being researched.

After determining dimensions of investigation in order to negotiate the complicated power relationships within that investigation, an ethnographer should then begin *reflective practice* [14]. Naples offers suggestions for reflection, but HCI has already generated its own effective strategies.

Reflective Practices in HCI

Reflective practices are not new to HCI. Schön's work on reflective practitioners [17] is widely cited in HCI design literature. Beginning in 2004 [8], workshops and papers with the theme or keyword "reflective HCI" have emerged on topics such as general critique, user research methods, and sustainable design. Critical reflection in HCI design has the ability to identify unconscious assumptions present in the design process that can have tangible outcomes when used systematically. [18] Sengers defines reflection "as referring to *critical* reflection, or bringing unconscious aspects of experience to conscious awareness, thereby making them available for conscious choice." Without it, Sengers argues, humans may inadvertently "adopt attitudes, practices, values, and identities." Sengers invokes Schön's reflection-in-action concept as foundational work in the composition of reflective design. She argues that reflection-in-action unites theory and practice and invites "everyday imagination and improvisation" using Schön's metaphor of a conversation with a design situation and its "back talk" and providing willing practitioners with the opportunity to modify problem space framing. [18] This type of reflection should be during action and via deliberate reflection triggers.

REFLECTIVE TRANSNATIONAL ETHNOGRAPHY FOR HCI USER RESEARCH

Armed with frameworks and tools provided by global ethnographers, standpoint feminists, and HCI design researchers, I propose that the constituent parts of this discussion form a collection of foundational work for a transnational HCI ethnographic methodology. Feminist standpoint theory, critical reflection, and global ethnography frameworks create a methodological set of practices and provide an epistemological position for conducting transnational user research that helps protect again bias assumptions and power riddled relationships and the adverse effects on design research and processes.

Here I have suggested a starting point from which practice and refinement will be necessary before a new method is disseminated. These suggested modifications are not wildly different from ethnography as it is commonly conducted in HCI research, but involves considerable more cognitive effort from a design researcher—standpoint identification and global viewpoints are pre-discovered and reflected upon actively by HCI ethnographers in actual practice.

Though the conversation about the appropriate execution and analysis tactics for ethnographic field work in HCI is not concluded [7, 6], it is clear that ethnography is a powerful tool in the HCI user researcher toolkit, but of course, should not be reduced to a mere tool to report facts and "implications for design." [7] The important features of ethnography—explanatory experience communication and conscientious anti-bias research tactics—can be preserved while still ensuring that tangible, useful information and outcomes result from transnational field research if careful attention is paid to the ways that practitioners execute ethnography.

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