CHAPTER ONE

WHY THIS HANDBOOK?

1.1 BEGINNINGS

Virtual worlds are places of imagination that encompass practices of play, performance, creativity, and ritual. The social lifeworlds that emerge within them are very real. They represent a complex transaction between their designers, who have certain goals and desires about what people will do, and the denizens of virtual worlds themselves, who exercise individual and collective agency. They draw upon physical world cultures in multiple ways yet at the same time create possibilities for the emergence of new cultures and practices. Just as in the physical world, people within virtual worlds perform and cycle through different roles and identities. Virtual worlds make such shifts explicit, as well as introducing spaces for play and experimentation. How can we study these emerging cultural contexts?

Ethnography, an approach for studying everyday life as lived by groups of people, provides powerful resources for the study of the cultures of virtual worlds. As ethnographers, what interests us about virtual worlds is not what is extraordinary about them, but what is ordinary. We are intrigued not only by the individuals in a group, but by the sum of the parts. We aim to study virtual worlds as valid venues for cultural practice, seeking to understand both how they resemble and how they differ from other forms of culture. We do this by immersing our embodied selves within the cultures of interest, even when that embodiment is in the form of an avatar, the representation of self in these spaces. The goal of this handbook is to provide ethnographers with a practical set of tools and approaches for conducting successful fieldwork in virtual worlds.

Cultures, as shared systems of meaning and practice, shape our hopes and beliefs; our ideas about family, identity, and society; our deepest assumptions about being a person in this world. We now face a contemporary moment when the phrase "in this world" requires fresh inquiry. With the rise of virtual worlds, we find novel possibilities for human culture, even as we discover continuities with long-standing physical world conventions and practices.

We are four scholars who became intrigued by virtual worlds, impressed by the social life we saw emerging within them. We were enthusiastic about bringing the approaches used to study physical world cultures into these new online places of social life. In particular, we used ethnographic methods, originally designed for studying cultures in the physical world, to study cultures in virtual worlds. We were surprised and gratified that our approach paid off: in different virtual world contexts, we discovered places rich with social interaction, creativity, challenge, and history. This told us something important about virtual worlds themselves as vital places of social interaction and cultural activity (Hine 2005).

Between 2006 and 2010 each of us completed a book based on our individual research projects (Taylor 2006a; Boellstorff 2008a; Pearce and Artemesia 2009; Nardi 2010). Since publishing these books, all four of us have been surprised at how often we have been asked, "How did you study the virtual world you write about?" Our short answer is usually something like, "Well, as an ethnographer I observed social groups and conducted interviews, but I also participated in ongoing virtual world activities as much as possible." We add that participation entailed intense involvement and engagement, often to the point of mastery.

As ethnographers interested in immersive detail and rich context, we have been painfully aware of the inadequacy of such perfunctory responses and the growing need for better resources and discussion about how to conduct this kind of work. For a time we suffered our frustrations in relative isolation. However, in the early months of 2009, the four of us began a series of lively conversations in which we discovered that we shared this predicament and a desire to do something about it. Eventually we decided to put our heads together and write a text so that we could, in a principled and productive way, offload the question "How did you do it?"—by suggesting to our interrogators that they grab this short volume. Our intention is to elucidate as succinctly as possible what it means to ethnographically investigate a virtual world. As noted below, we discussed the genre of a "handbook" at length and concluded that our contribution would be a practical text to be stashed in a backpack, easily consulted, and kept "on hand" when doing fieldwork—even when the "field" in question is online.

As we plunged into writing, we realized that we wanted to do more than craft a guide to ethnography in virtual worlds. We also intend this handbook to serve as a primer on ethnographic research as a core social science methodology, and as a valuable mindset or approach to scientific

inquiry. We hope our discussions resonate with virtual worlds researchers as well as those studying other online contexts, and even beyond. We discuss how ethnographic research requires immersion in a fieldsite using a palette of methods that always includes the central technique of participant observation. The goal is to grasp everyday perspectives by participating in daily life, rather than to subject people to experimental stimuli or decontextualized interviews. Ethnographers often speak of their work as "holistic." Rather than slicing up social life according to variables chosen for their contribution to variance in a statistically drawn sample, ethnographers attend to how cultural domains constitute and influence each other. We aim to discern broad patterns and meanings within what ethnographers often term "lifeworlds." Because of this focus, ethnographic research is predicated upon remaining in the field for a lengthy period, staying flexible in terms of what to study and how to study it, and avoiding deception. Ethnographic research is fundamentally distinct from experimentation; the goal is not to determine how controlled variables account for difference, but to trace and interpret the complex currents of everyday life that comprise our collective lived experience as human beings.

Ethnographic research has special resonance for anthropologists and sociologists, but it is also relevant for communication researchers and those inhabiting a loose coalition of computer science subdisciplines, including human-computer interaction, computer-supported collaborative work, computer-supported collaborative learning, and ubiquitous computing. The approach has long been of particular interest for those working in computer-mediated communication, social media, and game studies. While scholars outside of anthropology and sociology have reached out to ethnography in positive, generative ways, it is also true that they have sometimes misunderstood what ethnographic research demands. The four of us have, for example, reviewed manuscripts in which authors claimed they conducted an "ethnography" in only seven days, or labeled as "ethnography" a study in which the only data collection method was interviewing, or brought a game character to "level 85" and contended that voilà! an ethnography had (supposedly) been born.

The fact that we have independently encountered multiple instances of such confusions has motivated us even more strongly to clarify what ethnographic research requires. One powerful aspect of the approach is that ethnographers must be flexible in their techniques to make their

methods sensitive to the contexts we study. We illustrate this flexibility by drawing on our experiences as ethnographers in a number of different virtual world environments. But this flexibility is not unlimited. Simply stating "this is ethnography" does not make it so. It is for this reason that we want to identify with the greatest possible precision the key tenets of ethnographic research, to avoid its being conceptually sucked into an inchoate mass of "qualitative" or "naturalistic" approaches within which its distinctiveness and specificity would no longer be discernible.

To delineate the fundamentals of ethnography, we return to its historical roots, exploring the research of foundational scholars such as Bronisław Malinowski, Margaret Mead, and Hortense Powdermaker. Even while we draw on classic formulations of ethnographic practice, we consider the impact of virtual world fieldsites on method. We have a good deal to say in regard to what ethnography in virtual worlds specifically entails. We consider critical aspects of what "virtual" means and examine how researchers are embodied in the field as they work through avatars. We analyze the forms of participation possible in virtual worlds and examine ethical issues such as the potential for researchers to disguise themselves in ways difficult in the physical world.

Like many scholars, on occasion we conversationally use phrases like "digital ethnography," "virtual ethnography," or "internet ethnography." However, we find these labels misleading overall because ethnographic methodology translates elegantly and fluidly to virtual worlds. We see ourselves as ethnographers conducting research in virtual worlds, not as "virtual ethnographers." While the specificities of these spaces prompt their own set of considerations, the ethnographic research paradigm does not undergo fundamental transformation or distortion in its journey to virtual arenas because ethnographic approaches are always modified for each fieldsite, and in real time as the research progresses. The successful deployment of ethnographic methods in virtual worlds is, for us, a ringing endorsement of their enduring power to illuminate novel dimensions of human experience.

This handbook is a compact and practical reference guide that provides the reader with a point of departure into conducting ethnographic research in virtual worlds. It is by no means comprehensive, nor should reading it be viewed as the only requirement to develop expertise in ethnographic methods. This book is not an analog to the famous scene in the movie *The Matrix* (itself a celebrated conceptualization of a virtual world) in which one character has the skills for flying a helicopter mentally "downloaded" into her brain in a few seconds. Instead, approach

this handbook as an invitation to a journey, one that we hope will spur interest in ethnographic methods and help you engage effectively with other excellent ethnographic work.

A bit about us. Tom has the most traditional institutional background and affiliation, located in an anthropology department. During the writing of this handbook he served as editor in chief of *American Anthropologist*, the flagship journal of the American Anthropological Association, giving him a unique vantage point from which to encounter a wide range of ethnographic projects. His own research, however, has not been traditional in terms of method or topic; since 1992 he has conducted ethnographic physical world research on gay Indonesians. His virtual world ethnographic work in Second Life emerged from interests in globalization, identity, and power that were a direct result of his Indonesia research.

Bonnie, also trained as an anthropologist, has a long history of studying computer-mediated communication and collaboration. She conducted some of the first field studies of instant messaging, blogging, and collaborative video. Her interest in games emerged from her studies of social life on the internet in its manifold forms. Bonnie's work is accented by a strong interest in activity theory, a cultural-historical approach to the study of human consciousness with roots in early Soviet psychology. She coedits the MIT Press series "Acting with Technology," which publishes theoretical work directed toward social theory and technology.

Celia's background is as a game designer and game scholar. She came to ethnography from an interest in understanding how emergent behavior arises in multiplayer games through the interaction of large groups of players with specific software affordances. Her best-known ethnographic work concerns a group of "game refugees" from the game Uru who settled in other games and virtual worlds and created a "fictive ethnicity" around Uru tropes and culture. One of her most significant findings was identifying practices of "productive play" in which play parlays into creative practice.

T.L. was trained in ethnography as a sociologist, and her early work focused on embodiment in text-based virtual worlds known as MUDs (multi-user dungeons) and one of the first online graphical virtual worlds (Dreamscape). She then turned her attention to gaming spaces, writing a book about the massively multiplayer online game EverQuest and a number of articles on World of Warcraft where she has examined everything from play styles to forms of co-creation and governance. Her focus has been a critical sociocultural consideration of these worlds.

Each of us has thus conducted extensive ethnographic research in differing virtual worlds, exploring a wide range of topics. Our handbook builds on this background, and we will frequently illustrate conceptual points by turning to our own research.

1.2 WHY ETHNOGRAPHIC METHODS AND WHY VIRTUAL WORLDS?

We decided to focus on ethnographic methods in this handbook because in virtual worlds research (but more broadly as well), these methods are not always understood or valued. Some virtual world scholars still criticize ethnographic research by claiming it is anecdotal or unscientific—even doomed to irrelevance and extinction (e.g., Castronova 2006; Bloomfield 2009). Valuable empirical data obtained from ethnographic research are sometimes sidelined until "verified" by quantitative methods. Besides questioning the value of qualitative forms of inquiry, this kind of methodological partisanship does little to recognize the role that ethnographic methods play in building a rigorous and valuable scientific research corpus. As a result, we feel strongly that in addition to discussing ethnographic methods for virtual worlds as a set of research techniques, we must also discuss them in terms of the politics of knowledge production, examining these methods' importance to social science in the broadest sense.

We want to make clear that we advocate that the study of virtual worlds be driven by research questions, not a priori methodological dogmas or preferences. We may situate our study completely within a virtual world, and it is entirely legitimate and productive to do so if our research is so constituted. We may also fly across the globe to meet participants in physical world locales to conduct interviews and attend fan conventions. Our research will almost always include journeying to other online locales such as forums, blogs, and wikis. As we argue throughout this handbook, ethnography is a flexible, responsive methodology, sensitive to emergent phenomena and emergent research questions. There can be no argument for privileging certain locales or modes of study. Pertinent destinations and techniques issue from the aims of the research, and the choices of fieldsite and method should be based on the questions motivating inquiry.

Alongside our focus on ethnographic methods, we have worked to make our argument maximally concise and effective by focusing on the use of these methods to study virtual worlds. All four of us have research interests beyond virtual worlds, and we mean neither to privilege virtual

worlds nor to imply that our scholarship is limited to them. Despite this fact, we see two reasons why texts that cover "internet methods" more broadly sometimes become unwieldy. One has to do with an overly diffuse focus on "methods." In our view this topic is too expansive to be a focus at all—thus our narrowing of the methodological discussion to ethnographic approaches. However, another source of the diffuse nature of many discussions of "internet methods" has to do with the first term in that phrase. A remarkably broad set of technologies and practices even in its early history (see Wellman and Haythornthwaite 2002), "the internet" now encompasses far too many contexts to serve as a reasonable topic for something of the scope of a handbook, a fate it shares with terms like "new media" and "digital media." While even "virtual worlds" encompasses a wide range of contexts (as the different character of our varied fieldsites indicates), we believe that the "virtual worlds" rubric is sufficiently focused to serve as an organizing principle for a handbook.

To frame our discussion, we describe virtual worlds as possessing the following characteristics. First, they are *places* and have a sense of *worldness*. They are not just spatial representations but offer an object-rich environment that participants can traverse and with which they can interact. Second, virtual worlds are multi-user in nature; they exist as shared social environments with synchronous communication and interaction. While participants may engage in solitary activities within them, virtual worlds thrive through co-inhabitation with others. Third, they are *persistent*: they continue to exist in some form even as participants log off. They can thus change while any one participant is absent, based on the platform itself or the activities of other participants. Fourth, virtual worlds allow participants to *embody* themselves, usually as avatars (even if "textual avatars," as in text-only virtual worlds such as MUDs), such that they can explore and participate in the virtual world. (For additional discussions of the definition of virtual worlds, see Boellstorff 2008a:17 and Pearce and Artemesia 2009:17–20.)

Sometimes networked environments are miscategorized as virtual worlds. For example, because of their lack of worldness and embodiment, we do not consider social networks like Facebook or Myspace in and of themselves to be virtual worlds in our definition (though we recognize that as platforms they can occasionally contain virtual worlds *within* them through third-party applications, such as YoVille, .Friends, or Farm Town). Nor do we consider online communities sustained via chat forums or other media virtual worlds. First-person shooter games, such as Counter-Strike or Halo, also do not qualify because they are not

persistent: the world is only "on" as long as players are present. This is true as well for the single-player non-persistent worlds encountered in many non-networked console and computer games. For instance, we would not classify Bioshock or Myst as virtual worlds, although Uru, a networked instantiation of the Myst world, does meet the definition.

1.3 WHY A HANDBOOK?

Our decision to write a handbook was not capricious; the genre unifies questions of method and theory in a particularly effective manner. While texts terming themselves "handbooks" have appeared frequently in the social sciences and humanities, these sometimes resemble encyclopedias. For instance, the *Sage Handbook of Online Research Methods* weighs in at 2.7 pounds, with twenty-nine chapters across 592 pages of text (Fielding, Lee, and Blank 2008). Difficult to lift with a single hand, such volumes serve a valuable purpose but really belong to a different genre.

The notion of a "handbook" is not only specific but also ancient; for instance, Old English *handbōc* existed before the year 900 (Algeo 1993:282; see also Connors 1997), and the history of *manual* goes back at least five hundred years earlier. Historically handbooks were used by a range of persons, from clergy to military tacticians to students of Latin rhetoric during the first century B.C.E., and of Greek rhetoric four centuries earlier (Gaines 2010:163). The use of handbooks for teaching grammar seems to have been central to the term's reemergence in English in the 1800s. The enduring common thread uniting these notions of "handbook" across the centuries is the goal of capturing knowledge and making it accessible for practical use. In this sense a handbook is a guide to tools and procedures, a blueprint to things of the hand as much as the head.

The pivotal quality of a handbook is that you take it with you: it belongs as much in the field as in the library. In this sense a handbook ideally should be not just something you read before beginning a project, but something you keep at hand as you conduct research. We take this issue of portability seriously, in two key ways. The first concerns concision: we have labored to write a handbook that can actually be held in one hand. Of course, where virtual worlds are concerned the bookshelf and the fieldsite are often in the same physical room, so weight is not a direct concern. However, the handbook genre encourages concision not just for the sake of wrist muscles; concision is useful because it forces choices. No text can ever be everything to all readers, but the handbook

form particularly demands conceptual triage, a focusing of one's scope and goals to the matters at hand.

A second way in which we have sought to make this handbook maximally portable is by abstracting key methodological insights from any particular fieldsite. In other words, our view is that a handbook should set forth generalized techniques that researchers can modify as they "carry" those techniques into fieldwork contexts that could not be imagined "beforehand." We have thus drawn from our varied research experiences, working to develop insights regarding portable ethnographic methods that can be useful for a broad range of virtual world contexts (and beyond).

1.4 AN ORIENTATION TO THE VIRTUAL WORLDS WE STUDIED

Because this text is a handbook about how to do ethnography, not an ethnography itself, we do not provide sustained explorations of the virtual worlds we studied. You will find many brief descriptions of our ethnographic experiences in these pages as they relate to questions of method, but for a full treatment of our fieldsites you will need to turn to our other publications, particularly our monographs (Taylor 2006a; Boellstorff 2008; Pearce and Artemesia 2009; Nardi 2010). One of the assets of this book is that our fieldsites vary greatly; as a result, we have produced a practical guide that transcends any one particular location. Even so, the worlds we studied are places of fascinating social interaction and technological transformation, and, as ethnographers, our instinct is to share our discoveries with you in all their amazing complexity and specificity. While we cannot go into all the details of these worlds, at the same time it may be helpful to provide a rough sketch of each we studied. With this in mind, we provide brief summaries of our virtual world fieldsites, knowing that readers interested in the details of these worlds can turn to our other publications and those of our colleagues.

In this handbook Tom draws from his fieldwork in Second Life, an open-ended virtual world that launched in 2003. In its early history it was subscription based, but after June 2006 it became possible to get an account for free. Second Life quickly became known for its graphical detail and ability to unleash resident creativity. During the time of Tom's fieldwork (and at the time we wrote this handbook), the business model undergirding Second Life was that residents had to pay to own virtual land, which allowed them to have persistent content inworld (for instance, a house, a store, or a park). The Second Life platform allowed

residents to create objects inworld in real time, alone or in collaboration with others. Anything created (from a "script" that can animate an object to a virtual shirt, or a service like singing at a virtual club) could be sold for "Linden dollars" that were convertible with U.S. dollars or could be given away for free. When Tom began his research, Second Life had about 5,000 accounts and a maximum of about two hundred people inworld at any one time. From about 2008 to the writing of this handbook, the population had stabilized at around 1.5 million active accounts and around fifty thousand concurrent participants.

Bonnie draws from her research on the massively multiplayer online game World of Warcraft. Launched in 2004, the game had over eleven million players worldwide at the time of this writing. Available in nine languages, World of Warcraft was a truly global phenomenon. Players adventured in a medieval fantasy themed world, slaying monsters, practicing crafts, and trading at an auction house. World of Warcraft players communicated in text chat and often through voice. They came together in "guilds" or clubs that provided a cohesive social experience. The game was structured into several activities, among them raiding, in which ten to twenty-five people formed teams to engage in difficult battles. Players descended into dungeons to slay cunning raid bosses. These encounters required intense focus, communication, and coordination with other players. World of Warcraft has supported a plethora of game-related activities, including theorycrafting (the mathematical analysis of game mechanics), modding (the creation and distribution of player-created software extensions to the game, widely downloaded and used by players), machinima (videos of edited recordings of game action), the writing of games guides, and lively discourses about the game on blogs, forums, wikis, and social networking sites.

Celia's examples draw primarily from two environments—There.com and Uru: Myst Online. There.com opened in 2003, closed in 2010, and reopened in 2011. At the time of its 2010 closure, it was estimated to have 1.8 million users, 53 percent of whom were female. There.com had a cartoon aesthetic reminiscent of Disney's classic feature animation style. The emphasis was on avatar expressiveness rather than realism. There.com was an early virtual world to employ voice, accompanied by lip-sync and hand gestures, and text typed in cartoonlike bubbles triggered expressive animations, such as laughter (when you typed "laugh") or a pout (when you typed "sad"). Because There.com was an "all ages" environment, its player-created content, developed using external programs such as Gmax and Photoshop, was heavily monitored via a submission approval system.

Once approved, items were sold via an on-board auction system accessible through a browser within the There.com interface. There.com had its own online currency, Therebucks, and its real estate model was based on a system of community-owned "neighborhoods." Celia also studied Uru: Myst Online, a massively multiplayer game in the popular Myst series. The game consisted of a constellation of interrelated puzzles that slowly revealed the complex backstory of the now-uninhabited underground city created by the D'ni, a fictional race of people with the power to write entire worlds into being through magical books, when their own world was destroyed. Uru had a fairly realistic style but took place in a fantastical environment. Unlike many gaming-oriented virtual worlds, it had no levels and no combat. The gameplay focused on collaborative puzzle solving and unraveling the complex narrative (Pearce 2008b). Uru has opened and closed several times since it initially launched in 2003.

T.L. draws on her research across a variety of virtual worlds. Her original inworld ethnographic work, which looked at embodiment in these spaces, was focused on text-based worlds in the 1990s, as well as on one of the earliest graphical environments, Dreamscape (1995). Each of these worlds supported public spaces and private homes, made extensive use of virtual objects, and sustained rich forms of social life. She then turned her attention to primarily game-based worlds, in particular the massively multiplayer online games EverQuest (1999) and World of Warcraft (2004). Though more visually complex than the earlier worlds and reaching a broader mainstream audience, they shared many of the same properties, including forms of digital embodiment and emergent culture. They were also explicitly games, which shaped experience in specific ways. For example, coordinated collaborative activities like questing, fighting, and leveling up played a central role in organizing time and social lives. In all the worlds T.L. has studied, participants have engaged with them well beyond the confines of the software, including everything from websites to offline meet-ups. Because of this her work has tended to lead her to explore the ways communities construct their experience across diverse spaces and technologies well beyond the virtual world itself.

As these summaries indicate, the various virtual worlds we studied are diverse. Nonetheless, it should also be clear that this handbook was possible only because of many commonalities, parallels, and resonances among them. These commonalities represent the many ways in which virtual world ethnography shares fundamental tenets with ethnography in the physical world. Since its origins, ethnographers have worked to investigate cultural difference, the incredible range of ways to live a valid

and meaningful human life. At the same time ethnographers have endeavored to show how these differences are not unbridgeable. These different pathways of life move across a shared terrain of the human. One of the many contributions of virtual world ethnography is to broaden this conversation by showing how forms of technologically mediated sociality shape and are shaped by the contemporary context.