Observation

A matter of legitimacy

- One of the most important data collection tools of an ethnographer. Originally, it was almost a requirement for ethnographic research. It provides legitimacy:
  - "To say the Yanamami do this and the Borroro do that, and to be taken seriously, you have to have been there, seen them, and if not done it and brought back the T-shirt, at least captured and recorded their lives (these days on videotape). Fieldwork became *de* rigeur for ethnography and every practising anthropologist worth his or her salt had "his" (or "her") tribe. **This, then, is a cardinal thing to note about ethnography. Its practice is a particular form of legitimation.** Ethnographers "know" in ways others don't and can't. And what they know derives in part from personal experience." (Genevieve Bell, May 2004)
- As another data collection method it is helpful to triangulate the data.

Types

- According to the researcher engagement:
  - Participant: the researcher acts as the informants: writes code, attends meetings, discusses solutions. Example: Sharp et. al. (2004)
  - Non-Participant: the researcher only observes the informants. He is “fly in the wall”. Example: De Souza et. al. (2004);
- In any case, the researcher must document as much information as possible in his/her field notes;

Field Notes

- A description of events, people, interactions, tool usage, things listened, heard, experiences, impressions;
- Be as detailed as possible, i.e., write down the higher number of details possible;
- Separate observations and quotes from the informants from impressions and comments from the researcher (colours, symbols…);
- A private document that can only be shared within the research team.

Practical Tips

- Write your fieldnotes during the data collection [in the field] if at all possible;
- In the beginning of your study, write down as much as possible to the level of detail you need:
  - Meetings, interactions, tool usage, phone calls, process adherence, etc.
- Everything or anything can be relevant at this point. Often, at this point you do not know what is or is not important to your research
- Later, as your research progresses, field notes can be refined to focus on the "interesting" aspects only.

- It is important that the ethnographer is introduced to the informants by a respected member of the group.
- In the beginning, there is a natural "resistance" to the ethnographer, but this will cease as time progresses;
- Often, ethnographers have "key informants", i.e., experienced informants that introduce the ethnographer, facilitate his access, answer questions, provide explanations, and so on.
  - Finding and cultivating them is important!

Structuring frameworks to guide observation

- - *The person*. Who?
  - *The place.* Where?
  - *The thing.* What?

- The Goetz and LeCompte (1984) framework:
  - *Who* is present?
  - What is their role?
  - *What* is happening?
  - *When* does the activity occur?
  - *Where* is it happening?
  - *Why* is it happening?
  - *How* is the activity organized?

When should I stop observing?

- No obvious ending.
- Schedules often dictate when your study ends.
- Otherwise, stop when you stop learning new things.
  - when you start to see similar patterns of behavior being repeated, or
  - when you have listened to all the main stakeholder groups and understand their perspectives.

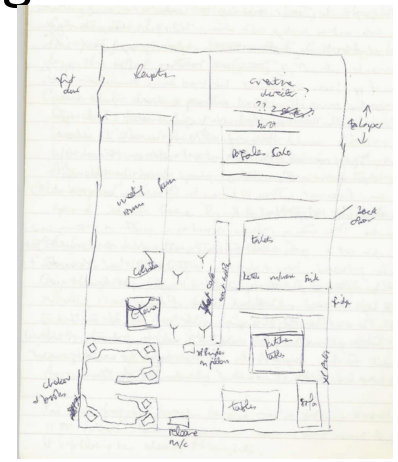
What to collect? Or the level of detail to collect?

- The researcher needs to decide the level of detail needed (Randall & Rouncefield 2004).
  - Gestures, eye gazes, movements as done by Heath & Luff (1992) in their study of subway control rooms;
  - Time spent in each activity performed by knowledge workers (Gonzales and Mark, 2004) and software developers (Goncalves, de Souza et al, 2009)
- This level of detail depends on the research questions. Every researcher needs to define what is needed.

What data to collect? (1)

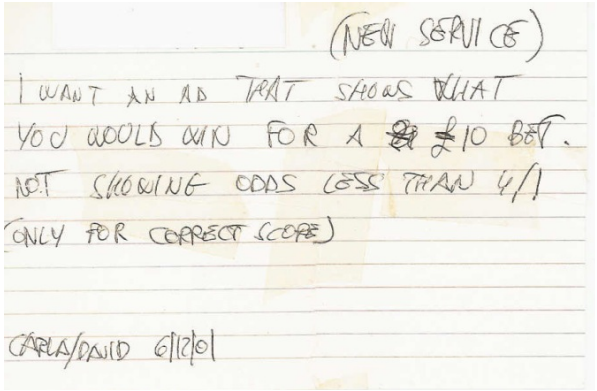
The following illustrative list (Crabtree, 2003, p. 53):

- Activity or job descriptions.
- Rules and procedures (etc.) said to govern particular activities.
- Descriptions of activities observed.
- Recordings of the talk taking place between parties involved in observed activities.
- Informal interviews with participants explaining the detail of observed activities.
- Diagrams of the physical layout, including the position of artefacts.



What data to collect? (2)

- Photographs of artifacts (documents, diagrams, forms, computers, etc.) used in the course of observed activities.
- Videos of artifacts as used in the course of observed activities.
- Descriptions of artifacts used in the course of observed activities.



- Workflow diagrams showing the sequential order of tasks involved in observed activities.
- Process maps showing connections between activities.

Data recording

- Notes, audio, video, photographs

- Notes plus photographs
- Audio plus photographs
- Video

Comparison of the three main approaches to data recording (1)

Criterion	Notes plus camera	Audio plus camera	Video
Equipment	Paper, pencil, and still camera.	Handheld recorder with a good microphone. Headset useful for easy transcription.	Video camera – handheld or fixed. Editing, mixing, and analysis equipment needed.
Flexibility of use	Very flexible. Unobtrusive.	Flexible. Relatively unobtrusive.	Needs positioning carefully to capture relevant activity. Obtrusive.
Completeness of data	Only get what note taker thinks is important and can record in the time available.	Visual data is missing. Notes, photographs, and sketches can augment recording but need to be coordinated with audio recording for analysis.	Collects thorough and detailed data, especially if more than one camera is used, but video material needs to be coordinated for analysis.

Comparison of the three main approaches to data recording (2)

Criterion	Notes plus camera	Audio plus camera	Video
Disturbance to users	Very low.	Low, but microphone needs to be positioned.	Medium. Camera can be difficult to ignore. Preliminary field studies and piloting with participants can help to lessen the impact.
Reliability of data	May be low. Relies on humans making a good record and knowing what to record.	High but external noise, e.g. fans in computers, can muffle what is said.	Captures detail of relevant activities, provided camera is positioned appropriately.
Analysis	Transcription straightforward. Rich descriptions. Transcribing data can be onerous or a useful first step in data analysis.	Critical discussions can be identified. Transcription needed for detailed analysis. Can revisit permanent original record.	Critical incidents can be identified and tagged. Software tools for detailed analysis. Can revisit permanent original record.

Practical Exercise

Find a small group of people, and try to answer the question, “What are these people doing?” Watch for three to five minutes and write down what you observe. When you have finished, note down how you felt doing this, and any reactions in the group of people you observed.

Use one of the structuring frameworks introduced this morning if you like.

Observe more than one group if you want to try different approaches

Practical Exercise Reflection

What did you do?

What were the people doing?

How did you feel about doing this?

Any reaction from the people you observed?

If you were to observe the group again, how would you change what you did the first time?