

## A. What is Observation?

Observation is a goal oriented, systematic data collection approach. Researchers use all of their senses to examine people in natural settings or naturally occurring situations. Observation of a field setting involves:

- **prolonged engagement** in a setting or social situation
- clearly expressed, self-conscious notations of how observing is done
- methodical and tactical improvisation in order to develop a full understanding of the setting of interest
- imparting attention in ways that is in some sense 'standardized'
- recording one's observations

When doing observation we collect concrete data in a natural setting. The data is our record of what we see, hear, feel, smell, touch, etc. The researcher is the instrument.

## B. When to use observation?

There are a variety of reasons for collecting observational data. Some of these reasons include:

- When the nature of the research question to be answered is focused on answering a how- or what-type question
- When the topic is relatively unexplored and little is known to explain the behavior of people in a particular setting
- When understanding the meaning of a setting in a detailed way is valuable
- When it is important to study a phenomenon in its natural setting
- When self-report data (asking people what they do) is likely to be different from actual behavior (what people actually do). One example of this seen in the difference between self-reported versus observed preventive service delivery in health care settings.
- When implementing an intervention in a natural setting, observation may be used in conjunction with other quantitative data collection techniques. Observational data can help researchers evaluate the fidelity of an intervention across settings and identify when 'stasis' has been achieved.

## C. Participant Observation

Some researchers draw a distinction between participant observation and observation. This distinction is murky. Participant observation "combines participation in the lives of the people being studied with maintenance of a professional distance that allows adequate observation and recording of data" (Fetterman, 1998, pp. 34-35). Participant observation underscores the person's role as participant in the social setting he or she observes. The range of roles one may play as a participant observer have been describe by [Gold \(1958\)](#), [Adler and Adler \(1984\)](#) and others.

Bernard (1998) suggests that participant observation must be learned in the field. However, he identifies several skills associated with participant observation, including:

- **Learning the Language** - learning to speak and understand the language of the people studied; learn insider phrases; people will begin to elevate their level of discourse with you
- **Building explicit awareness** - awareness of the little, often taken for granted, details of life
- **Building Memory** - building one's ability to remember things that happen or are observed in the field. Practice as well as developing a method for jotting notes can help with this.
- **Maintaining Naivete** - trying to maintain a position of inexperienced member of a social setting or culture. Developing this position of 'novice' is particularly difficult when one studies a familiar culture.
- **Building writing skills** - developing the ability to write comfortably and clearly

## D. Non-Participant Observation

Non-participant observation is observation with limited interaction with the people one observes. For example, some observational data can be collected unobtrusively (e.g. worn out carpet as indicators of high use areas in a physical setting). Researchers who study how people communicate often want to examine the details of how people talk and behave together. Non-participant observation involving the use of recording devices might be a good choice. This data collection approach results in a detailed recording of the communication and provides the researcher with access to the contours of talk (e.g. intonation) as well as body behavior (e.g. facial expression, eye gaze). Even a great observer cannot record these aspects in detail. Non-participant observation may provide limited insight into the meaning of the social context studied. If this contextual understanding is important, participant observation might be needed. These two data collection techniques can complement each other and be used together.

### *Observing by video or audio recording*

If people are to be observed in a closed setting, the researcher is not a participant observer, and tape- or video-recording is permissible then this data recording approach may be appropriate (e.g. physician-patient encounters). Choosing to tape-record or video-record a setting will depend in large part on what is permissible in that setting. There are, however, a few things to keep in mind:

- Decisions regarding how to record observational data depend largely on the focus of the research question and the analytical approach proposed.
- If the researcher is trying to understand how people behave together and the people in question can see each other, then the use of video may be recommended. This is because of the important role that bodily-based behavior plays in our social processes. Without this visual information, the researcher may not fully understand what transpires (e.g. physician-patient encounters). Additionally, capturing the details of this behavior in fieldnotes will be difficult.
- Audio and video recordings afford the researcher the opportunity to transcribe what occurs in a setting and play it over and over. This can be very useful in the analysis process.

**Fieldnotes**

<b>Descriptive Notes</b>	<b>Reflective Notes</b>