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CHAPTER 12

COLLECTING DATA THROUGH OBSERVATION

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Observation is used in the social sciences as a method for collecting data about people, processes, and cultures. Observation, particularly participant observation, has been the hallmark of much of the research conducted in anthropological and sociological studies and is a typical methodological approach of ethnography. It is also a tool used regularly to collect data by teacher researchers in their classrooms, by social workers in community settings, and by psychologists recording human behaviour.

> **Observation** is the systematic description of the events, behaviors, and artifacts of a social setting (Marshall & Rossman, 1989, p. 79).

In this chapter, the objectives are to:

- provide a brief historical view of observations as a data collection method,
- illustrate how observations may be used to collect data,
- discuss the advantages, disadvantages, and limitations of observation methods,
- show how to develop observation guides,
- discuss how to record observation data in field notes, and
- provide exercises to assist students in practicing their observation skills.

Observation has been documented as a tool for collecting data for more than one hundred years. Anthropologists of the late 19th century have illustrated in their works the importance of observation as a social science method. Early studies, such as Frank Cushing's work with the Zuni Pueblo people, Beatrice Potter Webb's study of poor neighbourhoods in London, and Margaret Mead's research with Samoan women, are examples of how observation has been used to collect data to study various cultures in the field of anthropology. These studies set the standard for how one conducts observations today to answer research questions in many disciplines. Whether you, as a researcher, are interested in studying an educational setting, a

social scene, organizational processes, individual behaviours, or the culture of a group of people, observation is a primary tool to help you document what is going on in that setting. Observations have proved to be useful to research beyond the field of anthropology and are used frequently in sociology, psychology, education, and other social science disciplines.

There are two major types of observations. **Participant observation** involves being in the setting under study as both observer and participant. **Direct observation** involves observing without interacting with the objects or people under study in the setting.

The stance of the researcher in the observation setting, that is, how you position yourself as a researcher, is an important consideration for the validity of the study. The quality of the data you are able to collect and your relationship with those who are being observed are affected by how you position yourself within the research setting. **Covert observation** occurs when those who are being observed are unaware that you are observing them. It is rare that covert observations would be appropriate in research; however, in instances where knowledge of being observed would, in some way, encourage participants to change their actions or to act differently than they normally would, it may be considered appropriate (See chapter 5 for further discussion about the ethics of covert research.). The preferred way of observing is **overt observation**, where the participants are aware of being observed, and you are not, in any way, hiding the fact that you are observing them for research purposes. **Gold** (1958) listed four stances that the researcher may take when conducting observations in a social setting.

1. The ***complete participant*** is the researcher who is a member of the group of people under study; he/she is involved in the setting and in studying other group members without their knowledge. Two problems exist with this stance: Group members are not aware of being observed, and group members may be reluctant to disclose information to another group member. Sometimes, people are more apt to share personal information with a stranger or with someone they will not see regularly in the future than they would be to share such information with a group member, who might slip and tell personal information to another group member. When the researcher is also a group member,

participants may later wish they had not divulged personal information to another group member.

2. The ***participant as observer*** stance involves the researcher who is a group member and who observes other group members with their knowledge. In this stance, other group members are fully aware of the study and its purposes. The disadvantage of this stance is that, as a group member, others are less likely to divulge personal details. Hence, there is a trade off between the depth of data the researcher is able to collect and the level of confidentiality available to group members.
3. The ***observer as participant*** is the researcher who participates in the social setting under study, but is not a group member. Group members are aware of the purpose of the research and are more likely to be open with a researcher who is not a member of their group. By participating in group activities, the researcher is better able to understand what is being observed.
4. The ***complete observer*** stance is one in which the researcher is able to observe the setting and group under study without participating, but participants are unaware of being observed. This is typical in situations where the researcher observes a public event in full view of the public, though they may be unaware of being observed. This stance may also be used, for example, when a psychologist observes a client, using a one-way mirror.

Once you have gained entry into a setting to begin observing, you may encounter situations in which direct observation, where you are not involved in the activity, is the best way to collect data; on the other hand, there may be instances where being involved in the activity, participant observation, enables you to better understand what is going on. In other instances, a combination of direct observation and participant observation may be in order. In any case, systematically observing your surroundings, paying attention to the activities taking place, and writing down what you have learned in the setting will be an important piece of the data collection process.

How and why do we use observations?

Observations help you to identify and guide relationships with informants, to learn how people in the setting interact and how things are organized and prioritized in that setting, to learn

what is important to the people in the social setting under study, to become known to participants, and to learn what constitutes appropriate questions, how to ask them, and which questions may best help you to answer the research questions (Schensul, Schensul, & LeCompte, 1999). Observation is used in both quantitative and qualitative studies. For example, in a chemical titration experiment, the researcher may observe the level of product that is dispensed into a calibrated test tube or beaker (quantitative). In education, the teacher/researcher may observe students to determine either the number of times a behavioural infraction occurs or the activities which precipitate certain infractions (quantitative or qualitative). In psychology, the researcher may observe behaviours to determine how patients/clients react to certain stimuli (qualitative). In linguistics, the researcher may observe how respondents express themselves in certain situations (quantitative or qualitative). Whatever the discipline, observation is widely used as a data collection method. But why is it helpful as a research method?

Participant observation, in particular, is helpful to allow you to understand the participants' world by actively engaging in activities in which participants typically are involved. Observations may be used to triangulate data, that is, to verify the findings derived from one source of data with those from another source or another method of collecting data. For example, you may use observation to verify what you learned from participants in interviews. Observations further help you learn what is important to the participants. They help you determine how much time is spent on various activities, verify nonverbal expression of feelings, and determine who interacts with whom (Schmuck, 1997). They provide an opportunity for you to record in writing what you have learned by taking field notes that can be used at a later time to recall what was observed in the research setting. Through observations, you may learn about activities that participants may have difficulty talking about in interviews, because the topics may be considered impolite or insensitive for participants to discuss (Marshall & Rossman, 1995).

Below is a sample exerpt of an observation as it was written in field notes. Notice the level of detail included; these details make it easier for the researcher to remember exactly what happened, as he/she reads it later.

September 5, 2006 Zulu Village, Public Performance

At a sociology conference, we participants were afforded the opportunity to visit a Zulu village created to show tourists traditional Zulu culture. We arrived at the village earlier than the other conference participants, and we were met by a man who called himself Phillip. He invited us to sit out of the sun in one of the huts, where he was going to provide the public introduction to Zulu culture. The hut was round and had a dirt floor with benches along the walls. The hut was made of wooden branches covered with thatch and was about 7 metres in diameter. The hut was shaped similar to a large acorn without its cap. A large wooden pole held up the centre of the building. Phillip was dressed in khaki shorts, a white shirt, slip-on leather shoes, and a small black and white brimless hat. There was a woman seated along the wall wearing a red brimless hat that was 10 to 12 cm. tall, which we were later told was a symbol that she was a married lady. She wore an aqua-coloured shawl, a blue skirt adorned with rick-rack (zig-zag ribbon) and other decorative beadwork. She wore beaded slip-on shoes. The bodice of her outfit was covered, for the most part, by her shawl. I noticed a large mortar and pestle, similar to the type American Indian women used to grind corn into meal. A cloth bag hung from one of the walls of the hut, and several pottery pieces were found against one wall. My two colleagues and I began to make small talk with a man, who sat on one of the benches across from us in the hut. He told me his name, but I could neither remember it nor pronounce it – it had two clicks in it. Shortly thereafter, the other conference participants began to enter the hut and be seated. Phillip moved to the centre position in the hut near the centre pole. He introduced himself again to the group and began to talk about the Zulu culture, the marriage customs, their daily lives in the past. He asked the woman to come near the centre pole, where she knelt, and he introduced her and described her clothing. I wondered how their lives had changed over the past twenty years and how they really felt about the loss of life as they knew it. I wondered how they felt about having us there, listening and learning about their culture.

When he finished his short presentation, we walked outside and were escorted to another hut, this one open on one side, the opening facing a beautiful scene overlooking a valley and the side of a mountain with other mountains in the distance. The flora was green and lush. Three men who danced for the group were dressed in knee-length grass skirts and carried sticks and shields; they were barefoot and wore necklaces and a headband with feathers in it. Around their biceps, two of the men wore fur (or it might have been wool – I could not tell) armbands and leg bands (around their calves). They danced around us and sang, shouting periodically, dancing close to us and scaring us with their war dance. Later, several women danced in line through the group, and Phillip told the group that they would perform the marriage dance. The beadwork on their short skirts and bodices was gorgeous! Their clothing was beautifully colourful, and they all wore beaded necklaces. The women wore headgear of various sorts to indicate their marital status (some wore scarves or skullcaps with a one inch fringe of beads, others the marriage hat). The women wore short beaded skirts, except for the married lady, who wore a longer, less ornate skirt; all of the women wore bodices that consisted of a beaded cloth with ties in several places to secure it in back. One of the women drummed, while the other women sang and danced. The medicine person was female, and she performed a dance of healing; she then laid out a blanket to arrange her medical tools. She wore a small cap with beads that dangled to her shoulders. Her outfit was bright blue, and she wore no necklace. While all of the other women wore the wool leg bands, the medicine woman wore leg bands of jingles like those on a tambourine or like bells, which jingled when she moved. The singing of the women was lovely and had a swift cadence and was very musical. After they completed their dances, the audience applauded, and the women stayed around to allow us to take pictures with them. I wished that I could understand their language; it was uncomfortable not being able to understand all that they said to each other.

In the above example, the performances were public, so no formal permissions were required; however, if more detailed, personal information were to be shared publicly, it would be appropriate to have permission from the elders or community leaders. As noted in Chapter 5, it is important to have proper permissions to observe; these permissions may be required from community leaders and from individuals you are observing. Alternatively, as long as you are in a public place, it is typically acceptable to observe others without any formal permission. However, when you are infringing on others' lives and when you plan to record and report to the world the results of the research, it is necessary to make others aware of the fact that you are there as an observer and that they are being observed. As mentioned earlier, it is rare that researchers participate in covert observation, in part, because participants' lives are being laid bare for the world to see without their permission. In most instances, it is important to hide the identities of participants; this enables you to obtain sensitive information and puts informants more at ease about being observed. You are more likely to find that participants, when confidentiality is maintained, are more likely to share their deepest feelings.

Advantages, Disadvantages, and Limitations of Observations

So, why should the researcher use observations? Are observations always beneficial to gathering data? There are advantages and disadvantages to using observation. On the positive side, observations may enable you (the researcher) to access those aspects of a social setting that may not be visible to the general public – those backstage activities that the public does not generally see. They give you the opportunity to provide rich, detailed descriptions of the social setting in your field notes and to view unscheduled events, improve interpretation, and develop new questions to be asked of informants (DeMunck & Sobo, 1998).

There are also disadvantages to using observation. DeMunck and Sobo (1998) suggest several:

1. You may not always be interested in what happens behind the scenes.
2. You may find interpretation of what you observe to be hindered,
    a. when key informants only admit you into situations to observe that are already familiar to you,

b. when key informants are similar to you,
c. when key informants are marginal participants in the culture, or
d. when key informants are community leaders.

In studying a culture that is different from your own native culture, it is important to use different key informants, as they can provide a variety of observation opportunities. No one person will be able to open the doors and serve as gatekeeper to all aspects of community life. Having marginal members, or people who are 'fringe' members, as gatekeepers or key informants may also limit the people and activities to which you have access. Using community leaders as key informants may also limit your observation opportunities, when there are various factions that may be opposed to those in leadership positions.

3. Limitations of using observation to collect data may need to be addressed when you focus on specific aspects of culture to the exclusion of other aspects, for example, when you are only interested in the political/religious influences of the culture (Johnson & Sackett, 1998).
4. Another limitation is that males and females may have access to different information, based on the access that they have to various groups of participants, settings, and bodies of knowledge in certain cultures (DeWalt & DeWalt, 2002).

The degree to which you are accepted in the target community is determined, in part, by how well you are perceived by community members. This acceptance is based on gender, age, class, ethnicity, and even appearance (Schensul, Schensul, & LeCompte, 1999). Acceptance is based on whether group members trust you, feel comfortable with you, and feel that involvement with the research will be safe for the community (Schensul, Schensul, & LeCompte, 1999).

5. Other limitations and considerations for using observations include determining to what extent you are willing to become involved in the lives of the participants (DeWalt, DeWalt, & Wayland, 1998). For example, if you are studying a sensitive, personal aspect of people's lives, you may need to develop a closer relationship to gain their trust to facilitate the participants' divulging such information.

6. Another consideration and potential limitation of a study using observations is researcher bias. As Ratner (2002) pointed out, you need to acknowledge your own biases and put aside those biases as much as possible to be able to view the data neutrally and make accurate interpretations. You need to be aware of your own biases to properly understand what you are observing; it is important to understand what is going on in the setting from the perspective of the participants. This means that you need to consider potential biases you have that stem from your own background of experience, which includes considering how gender, culture, and ideologies provide a filter for your understanding of the situation under study. Observation does not solely involve watching others; it also involves asking questions to ensure that your interpretation of what you observe is really what is going on.
7. Finally, the quality and contribution of the observations is determined by your ability to describe what is observed accurately and in detail.

Writing Field Notes

Field notes are the record of what you have observed. What information should be included in your field notes of an observation? Merriam (1998) provides a good description of how to conduct observations. Begin with drawing a map of the setting. This will help you to remember later many details about the setting in which you observed. When you draw the map of the setting, include such details as the size of the room and where furniture and participants are located in the setting. After you draw the map, write a description of the setting in your field notes, providing as much detail in your description as you can. This will help you remember what the setting looked like, when you look at your field notes at a later time.

After you draw the map and describe the setting in your own words, begin to record in your notes everything that you see, paying particular attention to those aspects of the social setting that will provide information related to your topic under study. This will include the various activities and interactions that occur in the setting. What is happening, when, for how long, and with or by whom? Observe participants' nonverbal behaviours and verbal behaviours alike. You will need to pay close attention to conversations between participants (being as inconspicuous as

possible), recording as much of the conversations as you can. Further, notice who speaks to whom, where the pauses are in the conversation, the degree to which participants touch each other, and how close participants stand to each other. Also note their stances in relation to each other; for example, are they facing each other when they engage in conversation or are they at an angle or side by side? Such aspects differ from one culture to another. You will also want to take notice of what happens in the social setting that you did not expect, as well as what did not happen that you expected to see (Merriam, 1998). Use as much detail as you can. It is better to have too much data than not enough data. You may be able later to flesh out details in your field notes, but if you do not have a rough framework of what happened, you may not remember it later. Photographs are an additional aid to observations that may help you later to recall specific details of the social setting.

Developing an Observation Guide

Depending on the type and purpose of the observation, you may wish to develop an observation guide to help you collect data in a more organized fashion. When you go into a social setting to observe, if you have a purpose or a particular aspect of the setting in mind that you wish to observe, you are better able to focus your attention on those activities that are likely to add to your data collection and, hence, help you answer your research questions. There are various approaches you might use to collect data through observation. For example, you may wish to use **time intervals** to determine what is happening in the social setting by periodically observing the activities going on around you. You might develop an observation guide to enable you to remember what is happening by making notes at regular time intervals (say, every fifteen minutes). A time sampling observation guide might look like this:

TIME	ACTIVITY	BEHAVIOR
8:00	Organizational Board Meeting	Chair introduced speaker
8:15	Speaker discusses new venture	Speaker stood at podium; he presented his argument for how the new water ecology project would impact the drought conditions.
8:30	Speaker discusses pros/cons	Speaker discussed revenues needed to fund project and advantages to implementation of ecology project.
8:45	Questions/Answers	Speaker engaged board members and public in Q/A session

In this example, the researcher is observing a board meeting and wishes to capture the process of the meeting, rather than the substance. More information would be added, if the purpose of the observation were to capture the content of the meeting.

Another type of observation guide uses **event sampling**. In this type, you would be interested in capturing certain events that happen in a social setting, and you would observe for some period of time, noting each time the event happens. A teacher, for instance, may want to determine how she can improve the way she responds to a child who is misbehaving in class, so she asks an observer to come into the classroom to observe and help her determine how she can better manage her classroom activities. In this example, the observer notes instances of misbehaviour by the student and records the activity taking place, the behaviour exhibited by the student, and the action taken by the teacher. The observation guide the observer uses might look like this (where S is the student and T is the teacher):

Observer _____Date_____

TIME	ACTIVITY	BEHAVIOUR	ACTION
9:45	Math lesson	S began tapping pencil and humming	T asked S to write a problem on the board
10:30	Reading in small groups	S was talking while others read silently	T asked S to stop talking and be respectful of others
11:35	Lining up for lunch	S pushed in front of peers in line	T sent S to the back of the line

Another type of observation guide might involve the use of a **checklist**. By listing possible activities you may observe in a particular setting, you are better able to focus on what actually occurs, rather than trying to capture everything that happens, much of which may not be applicable to your study. Checklists help you to collect data through observing which types of activities are occurring in the setting. In the example below, the researcher is attempting to determine the types of activities that occur in a particular setting. If the researcher is a teacher, for example, she might already have a list of behaviours to look for, based on her previous experience with ill-behaved children, and she would use this experience to create a list that will save her from having to write down repeated information during her observation. This type of observation enables her to simply mark the types of behaviour that occurred during the time she observed the student.

Date _____**Student**_____

Time	Fidgeting	Talking	Walking around	Hitting	Other
8:23	X				
8.30		X			
8:35					X
9:07			X		
9:45		X			

Another type of observation guide involves using a **rating scale** to record the degree to which something happens. For example, you might wish to collect data on how strong a particular response is to some stimulus. A teacher might want to record the degree to which a particular

student is behaving appropriately or how well someone performs some action. This type of guide involves your developing a guide that includes a scale to rate the activities you are observing, such as *Never – Sometimes – Often* or *Poor – Average – Excellent*. The scale you create should reflect various stages that give you the option to record varying degrees of performing some activity. An observation guide that uses a rating scale might be used, for example, when a supervisor is observing a teacher to determine the degree to which the teacher uses higher level questioning techniques, according to Bloom's taxonomy. To develop an observation guide to fit this situation, the supervisor would develop a guide that enables him/her to document what questions the teacher uses and the level of Bloom's taxonomy to which the question corresponds.

Bloom's Taxonomy
1 Knowledge (lowest level)
2 Comprehension
3 Application
4 Analysis
5 Synthesis
6 Evaluation (highest level)

Teacher's Question	**Bloom's Taxonomy Level**
What patterns do you see in the following information?	**4**
How does this information compare with what we just learned?	**2**

Observation guides that include **frequency counts** also provide a means for collecting data by enabling you to determine how often some activity happens within a prescribed period of time. The librarian, for example, may wish to determine how many students are checking out books in the library or how many times she has to ask students to do something. A psychologist may use a frequency count to determine the number of times in one session a client refers to something. A linguist might use frequency counts to record the number of times an informant uses a particular phrase or word. (For more in-depth explanation of observation as a data collection tool, see Kawulich, 2005)

Exercises

The following exercises are provided to help you develop your skills as an observer.

TEST YOUR UNDERSTANDING
Exercise 1: Developing an observation guide
Find a setting that you wish to observe. Select one of the observation guides discussed above. Develop your own guide for use in the selected setting. Before you begin, think about what it is you want to look for in that setting. Then lay out on paper various categories of potential aspects you will be looking for. Be sure to remain open to other categories and options that may occur in the setting.

TEST YOUR UNDERSTANDING
Exercise 2: How good are your recall skills?
Try this. Take out a piece of paper and a pencil/pen. Draw a map, showing what someone would see, if he/she walked into your house and stood at the door of the room in which you spend the most time. On that map, draw everything you can remember. After you have recorded everything you can remember, take the map home with you, and see how well you did by comparing the map to the reality of what is there.

REFLECTION: So, how well did you do? Were you able to remember where all of the furniture is placed? Did you remember to add the colours of various furniture pieces? Did you put in light fixtures, rugs, wall hangings?

TIPS FOR STUDENTS Make mental notes to consciously remember items in the order in which they occurred. Repeat important items to yourself periodically. Every observation typically begins with your drawing a map of the setting and describing participants present in that setting. If you have trouble remembering facts without making a written record, go ahead and write down what you want to remember. The beauty of observation field notes lies in their ability to help you remember things at a later date. Through observation, you are able to recapture what you observed at an earlier time, providing rich details of those observations through capturing them in field notes.

TEST YOUR UNDERSTANDING
Exercise 3: Sight without Sound
Find a situation where you can view some activity, but you cannot hear what the participants are saying to each other. This might take place while you are sitting inside a restaurant, for example, watching others who are outside of the restaurant interacting with each other. For five minutes, observe the action, and document in writing everything you can see. On your paper, draw a vertical line down the middle of the page. On the left side of the line, record everything you observe – describing the actors, their surroundings, their behaviors and actions/interactions. On the right side of the page, write down your feelings, what you think is going on, other comments than what you observe.

REFLECTION: How well did you do? Were you able to figure out what was going on in the setting, using only your sight? What did you find to be difficult in this exercise? What did you learn about observing?

TIPS FOR STUDENTS: Sight provides a very important source of information from observations, but it does not provide the whole picture. Be sure to recognize the difference in what you actually observe and what you believe is happening in the scene. You will also recognize that, while you are taking notes, you typically are looking down at the paper, not at the scene, so you are missing some of the action. You may want to use some sort of shorthand that you can flesh out later, so you can spend as much time as possible actually observing the activity in the scene under study.

TEST YOUR UNDERSTANDING
Exercise 4: Sound without Sight
Find a scene to observe, where you can only hear the activity, not see what is going on. You might, for example, sit in a booth at a restaurant or on a train and listen in on a conversation taking place behind you. On a sheet of paper with a line drawn down the center of the page, record everything you hear (and only what you hear) on the left side of the paper. On the right side of the paper, record what you think is going on and your ideas about what the participants may look like (take a guess about their age, ethnicity, and how they are dressed). After you have done this for five minutes, take a look at the participant and the scene to see how close your guess was. Observe/listen for five minutes.

REFLECTION: What difficulties did you encounter in conducting this observation? Were your guesses about what the participants looked like on target? Were you able to hear enough to tell what was going on?

TIPS FOR STUDENTS: In this exercise, you may find that it is difficult to hear what is going on behind you. You may also find that you are unable to really understand what is going on without observing the nonverbal communication, along with the verbal communication. Active listening is extremely important to the observation process. You will want to write down conversation snippets, if you are unable to record complete conversations, to enable you to flesh them out into your field notes after you leave the setting. Write down as much as you can remember, as you may not be aware at the time of what is important and what is not. If you do not have the information in the field notes, when you begin to look over your data sources later, you will not have the information. Even though you do not know if what you record is important at that time, if you have it in your notes, you will have it to use to compare with other information or further explain it, if needed.

TEST YOUR UNDERSTANDING
Exercise 5: Photographic Observation
Select an event to observe, and take a series of photographs (12, 24, or 36) to record the activity in pictures, numbering each photo as you go. You will want to take notes to explain the activity in each picture. On a sheet of paper, as you take each photo, number the explanation of what is happening in the photo. This will give you a series of pictures with a short explanation of each picture that tells the story of the activities that make up the event. You may wish to attach the paragraph of explanation to each picture, making sure that each picture and each corresponding explanation is numbered to avoid mixing up the series of pictures of the event.

REFLECTION: What did you find difficult in this exercise? Were the short explanations you gave sufficient to explain the full event? Would a stranger to the event be able to understand what went on by reading your explanations and viewing your photos? Did you take enough pictures to really portray the event, so others might truly understand what happened? Did you put in your

explanation information about the event that is not captured in the photograph that you might want to remember later?

TIPS FOR STUDENTS This exercise also is a wonderful opportunity for you to capture some event of importance to you in detail for future reference. While this is not a difficult exercise, you need to remember to keep up with providing the textual explanation for each photograph and keep your numbering correct. Photographs provide an excellent record for you to use to remember things you observe.

TEST YOUR UNDERSTANDING
Exercise 6: Direct Observation
In this exercise, you will act like a "fly on the wall." Find a social setting you can observe without participating or interfering with the activity or interactions occurring in the setting. Draw a map of the setting and describe the participants. Then, on a piece of paper, write down everything you observe, using all of your senses. Capture as much of the conversation, both verbal and nonverbal communication, behaviors, interactions, and other subtle factors as you can. Also look for such things as who speaks to whom, where the pauses in the conversation are, what happened that you did not expect, and what did not happen that you expected. Observe the scene for fifteen minutes.

REFLECTION: How well did you feel you were able to capture the gist of the scene? Did you feel that you were able to write as fast as the action was occurring? How did you determine what aspect of the scene on which to place your focus?

TIPS FOR STUDENTS: You may find that, while you are writing, you cannot observe the action. Do not try to write complete sentences – those will come later. Instead, use phrases that will trigger your memory to help you complete the field notes in their entirety later. You may also find that it is difficult to determine what to observe, particularly when so much is happening. In situations where you have no specific goal for what to observe, it may be helpful for you to look around with your "wide-angle lens" to see what is happening, then focus in on the activity you want to observe with your "zoom lens." In situations where you know what you want to observe, it

is much easier to rule out what is pertinent data and what is not. It is easy to focus in on what you want to capture in your field notes, when you are looking for certain activities to observe. When there is no focus, however, it is beneficial to capture as much as you can in your field notes, not knowing what is important, and winnow out the important data later. If you failed to capture the information in your field notes, however, you will not have it later to include in your analysis. It is better to have too much information than not enough.

TEST YOUR UNDERSTANDING
Exercise 7: Participant Observation
In this exercise, you will be participating in the activities going on in a social setting. You are to participate in some event that you want to remember, and, as the event unfolds, make a conscious effort to remember what is happening, who said what to whom, and so on. Participate in some event that will last for at least two hours, then write down what you remember in your field notes as soon as possible afterward. Do not forget to draw a map of the social setting initially, then create a written description of the participants, followed by a description of the activities that took place. Use as much detail as you can to describe what happened. Include other subtle factors, such as what happened that surprised you, what did not happen that you expected to happen, pauses in the conversation, who spoke to whom, and whatever else you can remember.

REFLECTION: How well did you do? Were you able to remember the majority of things that happened? How well were you able to remember conversations? How did participating in the activities differ from being a “fly on the wall” and simply observing without participating?

TIPS FOR STUDENTS: You may find that participating and not being allowed to write down notes about activities that you observe is frustrating, or you may find that your own participation enables you to better understand what went on in the setting. There are many instances in conducting research where researchers are not allowed to take notes or otherwise capture events (such as in photographs); participant observation provides them with opportunities to learn more from the participants about what is actually happening in the setting and what those activities mean to the participants. Writing down your memories about the experience is important for you to do as soon as possible after the close of the event. Do not speak to anyone about what you observed, before you write down your field notes, as others’ comments may skew your memories.

Observation is an excellent tool for researchers to have to enable them to collect data. You can hone your observation skills by practicing them regularly. This involves practicing your memory skills, as well as your ability to write quickly and to capture detailed notes in your field notes. Be sure to keep your field notes and other data for your study organized by including on each page of textual data a header that includes the date on which the data was collected, the location of the setting in which the data was collected, and the type of data collected, whether interview data, observation data, or artifact data. You may find that you feel like a voyeur at first, but remember that the more information you collect for your study, the better your study will be and the more valid the results will be.

Summary

Observation is an excellent tool for collecting data in a variety of situations, and it requires a good memory and extensive note taking. This chapter provides tips for conducting observations and making field notes to enable you to remember at a later time what you have observed.

- Observations are useful to researchers who wish to understand more about the situation under study. The field notes that summarize observations can provide rich detailed descriptions of the situation observed and help the researcher to later remember specifics about what was observed.
- The researcher must select where to focus his/her attention for the observation. The focus of the observation depends upon the purpose of the study and the questions one wants to answer. Some activities may be important to understanding the phenomenon under study, while others may be extraneous and unimportant. It is up to the researcher to decide what to focus on and write up in the field notes.
- The degree to which the researcher participates in the setting under study and his/her relationship to the actors in the setting being observed can potentially affect the depth with which the actors feel comfortable in disclosing personal information.
- Field notes provide a written photograph of the setting and what was observed. To be useful, they should contain information about the date and location of the observation, a

drawn map of the setting under study, and a written description, full of detailed accounts, portraying what was observed. Pertinent activities and actors in the setting should be documented. Other more subtle cues should be addressed, including what surprises occurred, what did not happen that one expected to happen, who spoke to whom, where the silences were in conversations, and so on.

- Observation guides may be useful in documenting what is observed. Various types of these guides may be developed, depending upon the purpose of the observation. They are particularly useful in situations where the researcher wishes to observe specific activities over a long period of time or in repeated observations.

Review Questions

1. What are the four stances a researcher may take to observation?
2. What are the advantages and disadvantages of direct observation and participant observation?
3. What are the important aspects that a researcher should include in his field notes of an observation?

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