

Participant Observation

POL 8618 Quantitative and Qualitative Research Methods

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Contents

- Definition
- Types
- Advantages
- Disadvantages
- How to apply PO
- How to analyse PO data
- References

Definition

- Researcher's immersion in a *natural* setting, village, group, community, event, etc.
- Researcher has to observe carefully what's going on.
- Researcher must be accepted as a member –even a special member.
- Long duration of the involvement.
- Full commitment to participate in the usual activities around.

- Double tension inside/outside the setting.
- Collect data, organise and systematise them –by taking notes, recording voices, sounds, images, smells, asking questions, etc.
- The whole process of PO should be planned in advance - it is not a spontaneous observation.
- Initial questions and hypotheses should guide the selection of the setting.
- The researcher must left behind his/her prejudices and must question his/her own convictions in order to understand the new environment.

- Non intrusive method: the setting should not be neither unintentionally altered in a substantial way nor intentionally manipulated.
- Main goal: to discover aspects of social life (rules, norms, processes, actors involved, meanings, practices, structures, etc.) which are not explicit for the participants or for outsiders.

*PO is the art of getting
answers without
asking questions*

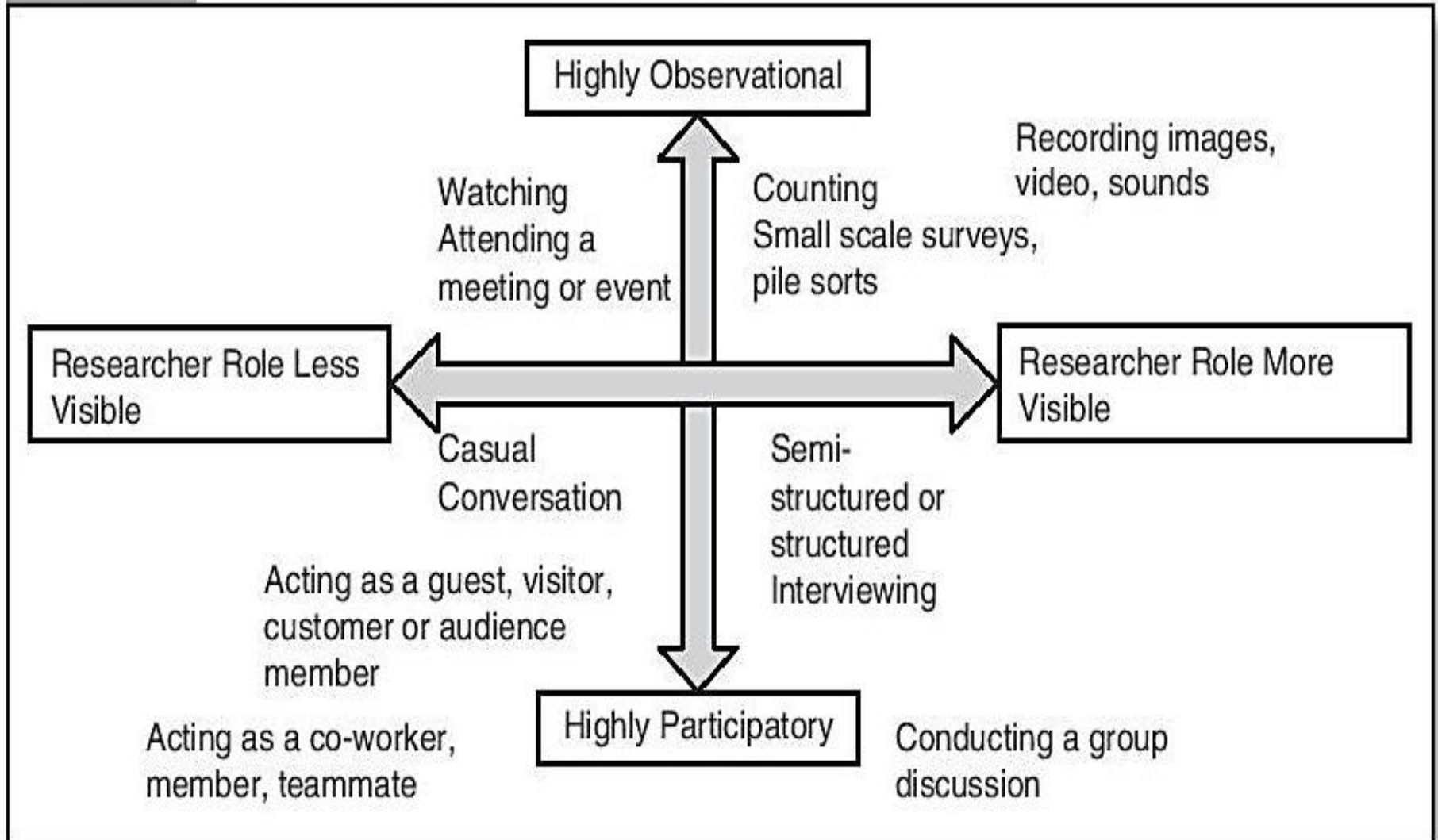
*(or while answering the natives'
questions)*

Types

- Degree of the researcher's participation.
- Degree of the researcher's identification.
- Degree of structuration of the observation (categories, codes, groups, time periods, etc.).
- Degree of the researcher's intervention in the setting.

	High	Medium	Low
Researcher's participation	Full membership within the insiders' group	Usual interactive participation as a newcomer	Direct Observation (no human interaction)
Researcher's identification	All know who is the PO	Only some know who is the PO	None knows who is the PO
Observations	Highly structured, planned and coded	Semi-structured and built in progress	No structured, planned nor coded
Researcher's intervention	Take active and leading part in events	Discreet but unescapable participation	Stealth, secret, disguised, discretionary and limited intervention

Figure 3.1 Participant Observation Continuums



Advantages

- It is useful in order to unveil aspects which are usually hidden or are not very well known –as a first approach.
- It allows to know the internal social diversity in detail – and also the contrast with outsider’s perspectives.
- It is convenient as an initial exploration and description of the social groups.
- Great detail and specificity about the language, names, meanings, roles, situations, etc.

Table 3.1 Using Participant Observation Across Multiple Phases of Research

Phase of Research	Examples
Phase 1—exploratory	On-site participant observation of labeling of medical records, lab samples, patients, equipment
Phase 2—questionnaire development	Focus groups with key audiences to decide content and wording for quantitative surveys
Phase 3—survey	Quantitative survey focused on labeling practices and spending
Phase 4—concept test	Product concepts developed and interest assessed through an online quantitative survey
Phase 5—in situ prototype use test	Working prototypes developed and placed for on-site use test. On-site participant observation of prototypes in actual use followed by in-depth interviews to determine prototype strengths, weaknesses, areas for re-design
Phase 6—large scale use test of final products	Final products tested in-use, with survey to finalize pricing and target marketing

- Usually there is no natives' reaction to the researcher's activity since this is integrated naturally.
- It serves as a technique of triangulation in order to contrast data stemmed from other methods –or to verify results and practical proposals once finished previous stages of the research.
- Easy way to reorientate the research process if needed.
- Flexibility in its application according to the researchers' changing needs.

Disadvantages

- Low reliability – observations may vary substantially according to the type of observer-participant.
- Difficult sampling in order to select the right setting and time periods.
- Easier access to public spaces but less accessibility to private spaces, to the insiders' opinions and memories, and to relevant data not available at sight.
- Incommensurability: difficult measure, comparison and translation of different meanings for different groups.

How to apply PO

- 1// Select the setting according to objectives and hypotheses of the research and practical feasibility.
- 2// Getting into the location, going to where the action is and conduct your research “in situ”.
- 3// Building rapport (trust and good understanding) with the participants – “They have to accept you, to some extent, as someone they can ‘be themselves’ in front of. While you don’t need necessarily to be viewed as a complete insider, a successful PO has to inspire enough trust and acceptance to enable her research participants to act as much as they would if the researcher were not present.” (Guest et al. 2013: 76)

- 4// Stay in the setting as much as you need or visit the site as many times as you figure out all the topics of your research are covered, and “for a long enough period to have a sufficient range of experiences.” (ibid.: 77)
- 5// Participation in relevant activities by paying attention to all the details and the whole –and by presenting yourself properly (not always necessarily as a researcher).
- 6// Test the research questions both from inside and from outside the situations.
- 7// Introspection (personal reflection) in order to understand the different roles experienced as a participant

- 8// Systematic record of all the significant aspects (either qualitative or quantitative) under observation as well as your own introspective thoughts – more structured forms to collect the information may be prepared in advance.
- 9// What to observe? Actions, interactions, conversations, behaviours, emotions, the spatial organisation, objects, differences between social groups, physical perceptions, etc.
- 10// Fieldwork notebook: take notes as soon as possible on a regular basis.
- 11// Narrate events and attempt to answer the research questions by inducing the hidden norms which are operating, testing competing explanations, pointing to evidences, formulating new questions, etc.

Category	Includes	Researchers should note
Appearance	Clothing, age, gender, physical appearance	Anything that might indicate membership in groups or in subpopulations of interest to the study, such as profession, social status, socioeconomic class, religion, or ethnicity
Verbal behavior and interactions	Who speaks to whom and for how long, who initiates interaction, languages or dialects spoken, tone of voice	Gender, age, ethnicity, profession
Physical behavior and gestures	What people do, who does what, who interacts with whom, who is not interacting	How people use their bodies and voices to communicate different emotions, what people's behaviors indicate about their feelings toward one another, their social rank, or their profession
Personal space	How close people stand to one another	What people's preferences concerning personal space suggest about their relationships
Human traffic	How and how many people enter, leave, and spend time at the observation site	Where people enter and exit, how long they stay, who they are (ethnicity, age, gender), whether they are alone or accompanied
People who stand out	Identification of people who receive a lot of attention from others	These people's characteristics, what differentiates them from others, whether people consult them or they approach other people, whether they seem to be strangers or well-known by others present Note that these individuals could be good people to approach for an informal interview or to serve as key informants

Source: Mack, Woodsong, MacQueen, Guest, and Namey (2005, p. 20).

Table 3.5 Types of Data Collection in Participant Observation

Data Type	Description	Pros and Cons
Observation Notes/ audio/video	<ul style="list-style-type: none">• The baseline for participant observation, notes, and recordings• Written/transcribed/digital record of what the researcher saw, heard, or felt during the observation period	<ul style="list-style-type: none">• Very open to emergent data, little/no instrument bias• Can be difficult to capture in some venues, time consuming to analyze, subject to the bias of the researcher regarding what to note or record
Casual conversations/ informal interviews	<ul style="list-style-type: none">• Notes or recordings of actual conversations	<ul style="list-style-type: none">• Captures data in the vernacular and in context• May not be relevant to research objectives, can be hard to accurately record in some settings• May be highly idiosyncratic and difficult to analyze
Semistructured or structured interviews	<ul style="list-style-type: none">• Interviews conducted using an interview guide	<ul style="list-style-type: none">• Provides data relevant to the research objectives• Takes the encounter into a “research” mode that decreases some aspects of the natural context
Counts of specific observations	<ul style="list-style-type: none">• Counts of the frequency/intensity/source of specific behaviors of interest—usually collected with the aid of a template listing the types of things to be counted	<ul style="list-style-type: none">• Provides data that can be used to identify norms or make comparisons between events/times/individuals, and so on.• Requires the development of a data collection instrument and the ability to accurately record the behavior of interest in the field setting
Process flows	<ul style="list-style-type: none">• Visual or verbal records of common processes—often laid out in a flow chart or stepwise diagram	<ul style="list-style-type: none">• Excellent for understanding sequenced events (work flows, manufacturing processes, decision processes)• Can be challenging to capture• Danger of capturing an idiosyncratic version
Lists and categories	<ul style="list-style-type: none">• Lists of items, categories, and inclusion/exclusion rules	<ul style="list-style-type: none">• Provide both list content and cultural meaning• Can be tedious to collect and may be difficult to extract “rules”

Table 3.6 Note-Taking Tips for the Field

Field Note and Documentation Tips

Capture it quickly—the sooner you write down your observations, the more complete and accurate they will be.

Expand your notes as soon as possible—use the first possible opportunity to expand your notes into a full record; do not count on being able to remember “all the important stuff”—memory is fragile. In expanding your notes, fill in the complete story of *what* you observed first, before adding in interpretations or *what you think about what you observed*. The notes should provide a detailed record of “the facts,” as well as your own commentary and developing understanding of those facts.

Use recording devices and assistants—in many cases, you do not have to do everything yourself. Modern digital photo/video/audio recorders, recording capabilities built into phones, and specialized note-taking devices, such as Livescribe (a combined pen–digital audio recorder that is excellent for field notes), can be used in many participant observation venues. If you are working in a team, having one person act as the note taker can help spread this burden and improve overall recall of observations.

Use time and labor saving tricks—develop shorthand for names/events/ideas that appear frequently in your observations. Develop and use forms and templates to streamline data capture for key topics.

Stay organized—Chapter 7 discusses data management. The sheer volume of data generated during participant observation makes this especially critical. The time you spend organizing your data as you collect them will be rewarded during data analysis. A little effort up front prevents a lot of frustration and wasted time at the next stage of the project.

How to analyse PO data

- 1// Codes and categories for all the kinds of data collected.
- 2// Organise and expand fieldwork narrations in order to distinguish topics.
- 3// Apply discourse analysis to discursive materials; semiotic analysis to signs and images; quantitative analysis to events, patterns or numbers of people.
- 4// Select excerpts, verbatim and evidences in order to use them in the general interpretation and report.
- 5// Relate your data and pre-analyses to relevant theories.

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