

Conducting Observational Research



This project is made possible by a grant from the U.S. Institute of Museum and Library Services.

Conducting Observational Research

Background

Conducting the Study

Analyzing Findings

What are observational studies good for?

- Developing a **broad, holistic understanding** of the space/service in question
 - Context – how does the space/service fit into users' lives on a larger scale?
 - Constraints – what physical, social, and other constraints impact their behavior in this space/service?
 - Discovery – what behavior patterns are we observing that we haven't seen before?
- Discovering **unmet needs**
- Observing **natural behavior** (or as natural as it gets)

What are observational studies NOT good for?

- Getting quantitative results
- Validating particular decisions
- Gathering evidence quickly
- Answering detailed web interface questions
 - Comparing options
 - Usability testing



**Created by Luis Prado
from the Noun Project**

Types of observational studies

Fly-on-the-wall (FOTW) observation

- May be secret or announced
- Physical – i.e., you're present in your participant's space
- May feel more natural than digital observation because you can more easily fade into the background and truly be a “fly on the wall”

Online observation

- Capture online behavior by observing live or through a recording
- Time with users is often more limited with this method
- May be harder to gain users' context through a screencast

Conducting Observational Research

Background

Conducting the Study

Analyzing Findings

Framing your observational study

- What are you trying to learn?
- Choose method based on **what you want to know**
 - *Example:* Students' info-seeking behavior on the library website = **Online observation (screen recording)**
 - *Example:* Students' interactions with library staff at a service point = **FOTW observation in the space**

Recruiting users

- How **many people** would you like to observe?
 - Start with 5–7 and expand as you can
- How **long** would you like to observe?
 - Hour-long is a reasonable baseline, but consider your goals
- Will you provide **incentives**?
 - Recording users' screen is invasive, so consider a (larger) incentive
- How will you **select participants**?
 - Consider a screener survey

Roles in an online observation

Moderator

- Arranges the observation session
- Provides intro
- Administers pre- or post-questionnaires

Note taker

- May not be needed if sessions are recorded

Additional observers

- Keep this number small to keep participants at ease, or just have interested parties view the recording



Created by Vectors Market
from the Noun Project

Recording sessions

- Provide consent forms
 - Tell participant who will see the recording and how data will be used
- Choose your tool
 - e.g., Zoom, Teams, WebEx



Tips for successful observations

- Run a **pilot!**
 - Make your sure your technology or in-person set-up works; test your note-taking forms
- Put your **participant at ease** (if they know you're watching)
- Be sure **not to interrupt or get in the way**
- **Take notes** on what you see
 - Consider developing a detailed log or note-taking template for in-person observations
- Consider a **post-session questionnaire** for follow-up questions
 - Keep it short, and ask open-ended questions

Conducting Observational Research

Background

Conducting the Study

Analyzing Findings

Analyzing data

- Observational data is rich – and **unstructured**
 - The more acquainted you are with the data, the better
 - Review and add to your notes immediately following the observation, then give yourself at least several hours of distance from your notes before more thorough analysis
- Rely on findings to give you answers rather than searching for answers in your findings
- Focus on info relevant to your **research questions**
 - Make note of other interesting points to visit later

Tips for successful analysis

- Consider design implications and new opportunities
 - Be **creative and open** to your findings extending beyond the exact service, space, or interface you were studying
- Allow findings to shape and deepen your **understanding of the problem space**
- Make note of **other research questions** you'll want to explore

Following up on what you learned

- Record your findings in writing to **share with stakeholders**
 - Doesn't have to be a formal report
 - Include screenshots and quotations
- Develop **recommendations for improvement or follow-up**, and commit to fixing what you can
- Be careful not to follow users' suggestions literally

“If I had asked people what they wanted, they would have said faster horses.”

(attributed to Henry Ford)

Conducting Observational Research

Was this content useful?

Please provide your feedback at: <https://forms.gle/yTUuTLvE3SyFDtg3A>