Conducting Observational Research

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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
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
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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
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 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
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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)
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