

Concept paper: Observation

A qualitative method to collect information about what and how is (actually) done in actual situations, e.g. to map painpoints, understand the sufficiency of changes. As such, observation is a method which involves systematic observation, recording, description and analysis.

It is important to note that **observation can be conducted by either notifying the person(s) being observed or not**. The former is the classical and most common definition of the tool: the researcher simply observes and takes notes, without the object knowing it. It is also possible to inform the participant(s), but this may change their behavior significantly and bring about negative implications on the level of research validity.

What methods/other tools/ techniques can be used while implementing the tool?	Main aims while using the tool
Other tools include training (observation used during it), interviews (interviewing the subjects afterwards), etc. Certain digital tools for recording impressions.	Knowledge about how people/problems/places and their interrelations play out in real life: are there any differences between what people say and what they (actually) do – how mobility is handled in real life and actual situations. The results will give information on the user group – what kind of physical, technical or social challenges they face during their journey using public transport.
How can the tool be used in each phase of the process (when developing age-friendlier and green mobility solutions)?	
<p>Planning stage: When planning, observation can be a way to find out more detailed and actual information about the user group's restrictions, challenges and needs in PT. This can provide input into the development process of PT. By observing life and mobility in the community, actual problems and the size of these problems will be identified.</p> <p>Development stage: Observations do not provide much information about how the residents want things to be different, but it reveals how mobility plays out in real life, which allows to conclude where, how and to what extent a problem occurs. As such, it is a way to find out more detailed and actual information about the user group's restrictions, challenges and needs in PT.</p> <p>Implementation stage: At the implementation stage, observation can give more detailed and actual information about the user group's restrictions, challenges or needs in PT. Also, observing pilots or testing sites of developments may show what kind of effects implementing changes may have and what problems may come up.</p> <p>Evaluation stage: At the evaluation stage, observation can give more detailed and actual information about the user group's restrictions or challenges in PT and help to evaluate the operation and how it succeeded to take the user group and their needs into consideration. As part of the evaluation, observations will be repeated to capture if the interventions have had the intended effect(s).</p> <p>Feedback: Observation enables to observe user satisfaction in the new situation (by comparing new behaviors to the old ones) but it does not allow to get a person's own opinions or explanations, if not combined with some other tools, e.g. interviews.</p>	

What is the aim of engagement with this tool?	
As the user group can only be observed, then no explicit informing, consulting, collaboration or empowering is possible (unless the researcher decides to inform them of the observation, in which case, some informing is possible). There are implicit ways of collaborating and empowering, however, as the observation results can feed into new planning processes.	
For how many people and how is the tool suitable (for one-time use)?	How much effort is required from the participant and what influences that?
<p>1 – Observer is able to observe one person carefully.</p> <p>2 – Observer might have difficulties with observing two people at the same time, something might be left out from observation in this case. (3-5 maybe in some cases, if a group of people are observed by several observers)</p> <p>However, by observing life as lived and the general “scene” it does not make much sense to talk about an amount of people.</p>	<p>Not relevant.</p> <p>As participants are not aware and they do not have to do anything differently as planned by themselves, they do not need to contribute any effort.</p>
Time needed to <u>prepare</u> using the tool and what influences the time needed?	Time needed to <u>implement</u> the tool and what influences the time needed?
<p>Little or some preparation is required to prepare the observation method, plan its aims and implementation. Also, observers must be trained for the task. Also, you need to decide the locations (radius).</p>	<p>Some set-up is required to observe the user group, e.g. their daily commutes, journey chain, using PT, etc., which means that in order to get a true impression of how life is lived, considerable time may be required. Additionally, the observer has to take notes and possibly record conversation, etc. It may also be necessary to do several rounds or inspections of the observable area or person to detect patterns.</p>
Time needed to <u>summarize</u> using the tool and what influences the time needed?	Price for the user of the tool and what influences the price
<p>Considerable effort to summarize required</p> <p>After the observation, the observer has to go through the material carefully and analyse it. In case of several observations, all these outputs need to be summarized together. As the gathered data is qualitative, this also increases the time of summarizing.</p>	<p>The task can be externalized for a professional (e.g. service designer or cultural researcher), but other ways there are no inherent costs to the tool if the observer’s salary is not counted. Depending on observable situation, usage of PT may be needed. Alternatively, if the work is done by students as a study project or by volunteers, there is no cost (it should be noted that this way, the qualitative criteria cannot be too high).</p>

SWOT on using the tool

STRENGTHS

In case of good planning and many observations over a long period, it is possible to get a good understanding about the situation and pain points; As a data collection method, there is direct access to research phenomena, high levels of flexibility in terms of application and generating a permanent record of phenomena to be referred to later.

WEAKNESSES

If subjects are notified, the observer might influence the people being observed;
Requires time if several observations are needed to understand patterns and get enough input;
To understand the observation results better, it is good to combine it with other tools, e.g. interviews, questionnaire, different mappings, mobility lab.

OPPORTUNITIES

Good method to get background information to plan the use of other tools (e.g. interview) and to get more information for developing public transport;
There may be unexpected and interesting results;
Possibility to see how the real life differs from what is said or assumed;
Possibility to see how opinions of user group differ from what is noticed through observation (what is kept important by user group and observer).

THREATS

In cases where it is not possible to observe so that people do not know they are observed, the people being observed might be nervous or not feel good about observer being present, which will affect the outcome;
Observer bias may influence the quality of observations/the data gathered.

How to use the tool?

How to prepare using the tool?

- Planning for the observation: how to implement it, form or base for observation, guiding questions and background information (if the tool is modified to notify the participants, then also agreements with the observed people). If there are several observers, a template is needed to write down the findings in a coherent way.
- Plan for the time and place of observation, bring pen and paper to take notes.
- Decide on how to summarize and evaluate the effectiveness of using the tool.

How to implement the tool?

- Place yourself in a spot where you have a visual overview of your radius.
- Pay attention and note down everything connected to the aim of the observation: who, when, how (often), sounds, smells, interactions, conflicts, etc.

How to follow-up using the tool?

- Go through your notes of the observation, compile a summary of the observation. In case of multiple observations, plan the next observation. Once you have all the notes, summarize the results of all of the observations.
- Usage of the tool and effectiveness of using the tool should be evaluated – was the tool implemented as it was meant to, did the researcher find out something useful, did the tool fulfill its purpose, etc.
- If possible and necessary, repeat the observation (exact time and place) after your interventions as a way to observe which changes, if any, it has brought.

Tips and hints for using the tool with people in silver age

- **Carefully use all your senses and be aware of everything** that is happening with the observed people – voice, gestures, reactions, etc.
- **Be observant of expected reactions** – e.g. it is recognised that one restricting factor in using PT and learning to use new services and technical devices, is shame. Especially men can feel shame when they are not familiar with these. Observe, if there is nervousness or similar moments when using PT, entering the bus, using the card, choosing the seat, getting off the bus etc. Mark down all feelings and impressions regarding these.
- **Take all your notes and write down any thoughts as soon as possible** during and/or after the observation. This way it will not be forgotten or changed. Try to be as clear as possible so that everyone could understand your notes.
- **Train your observers** – the observer should have basic knowledge of the observation method in order to plan and carry out a successful observation. Depending on the topic to observe, the observer may need training to interpret what they see or hear.

More experiences from GreenSAM partners

Read [here](#) how Valonia used observation to understand its silver age public transport users.



Observation (Photographer: Heta Laiho)