Observation: Perspectives on Research Methodologies for Leisure Managers

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Abstract

Observation is an important research and data collection methodology. Effective observation and reflection on that observation contributes to effective learning. Observation can be participant or non-participant, covert or overt; it can be used to collect quantitative or qualitative data, and can be structured or unstructured. Observation can be used in service and leisure environments to examine facilities and physical environments, customer interactions and staff interactions. Participant observation yields a unique perspective on the service and leisure experience. Two examples of the use of direct observation to study leisure environments are used to illustrate the way in which observation can be used to enhance understanding of the effectiveness of leisure environments, and to understand the leisure experience.

Introduction

Researchers, managers, and others who need to learn and develop an understanding of the world around them benefit from effective observation. Yet many researchers and managers overlook observation as a data collection approach, preferring instead other data collection tools such as questionnaires and interviews. These tools lend a sometimes spurious scientific aura to the process, and apparently make for easier analysis of data gathered. Observation clearly raises issues of subjectivity, and the role of the researcher. These issues are not less significant with questionnaires and interviews, although it is perhaps easier for the researcher to pretend that this is the case.

This article is addressed to researchers, students and managers in leisure contexts. It explores approaches to the use of observation in such contexts. Observation is an important method of data collection for a number of reasons:

1. It can sometimes be used to collect data to which the researcher or intelligent enquirer might not otherwise have access. Thus, for example, the management of a leisure facility may be reluctant to make statistics which reveal attendance figures for a given attraction or facility. Approximate figures, which may be sufficient for comparisons with other attractions on comparable days, can be obtained by counting cars in parks at appropriately selected times.

2. It can yield direct information about the nature of the leisure experience in specific leisure environments. Participant observation during
which the observer participates in the experience, and has the opportunity to listen to and watch others as they participate, may help to identify limitations, and yield an understanding of both customer reaction and the availability of basic facilities. For example, use of swimming pools in a variety of different contexts will reveal issues concerning the relative location of changing rooms, changing room temperature, number of lifeguards on duty, incidents which cause lifeguards to take action and availability of any first aid facilities.

3. Students and others need to learn to make effective observations, and to use such information in the learning process. This process is the basic Kolb learning cycle, which is concerned with experiential learning. Lifelong learners need to be able to learn both through formal learning methods such as those delivered in an educational context, and also through experiential learning. They need to enhance their skills in both of these categories during their formal undergraduate and postgraduate education.

This article takes the researcher’s perspective, because all managers need to be researchers, both in relation to their analysis of the successes and failures of their own facility, but also in relation to competitors’ offerings. Managers need to be able to learn from the facilities run by their competitors by observation; any information, which is seen to be commercially sensitive, will not be available to managers of competitive facilities. In addition, managers can learn much about the leisure experience and customer perspectives from observation in a range of related, but different leisure contexts.

Observation can yield information which:

1. Solves a management problem
2. Provides the basis for a wider theoretical approach to issues in the leisure experience or leisure environments
3. Offers managers and researchers insights, which lead to learning that informs subsequent activities or decisions

This information may relate to:

1. Physical facilities and the environment in a leisure facility. Specifically, a researcher could use observation to:
   * Examine and record basic facilities
   * Reflect on the operational effectiveness of facilities
2. Customer behaviour in relation to
   * Interactions with the service agent
   * Customer to customer interactions
3. Staff interaction with each other and their general demeanour and ability to deliver the service.
Observation as a Research Methodology

Looking and watching should be an activity that is embedded in the psyche of all researchers, learners and managers. It should be a continuous part of being in situations. Nevertheless, effective observation is a skill that needs to be acquired and honed. It is evident that undergraduates completing final year dissertations, and other new researchers or enquirers into the world around them find observation to be very challenging, and need support from supervisors or mentors, if they are to develop their skills of observation. This is in part because the effectiveness of observation depends upon:

What An underlying comprehension of what is being observed; the more that an observer already knows about the leisure experience or organisational context under observation, the more relevant or honed will be that observation.

Why A clear formulation of the question that underlies the observation. This will be informed by a clear formulation of a management issue or problem that needs resolution, or through the identification of a clear research question. Research questions are most effectively formulated with reference to earlier research literature that is of relevance to the specific context.

How An appropriate choice of the type of observation, including choice between participant and non-participant, and overt and covert. In addition, researchers need to understand what activities or operations need to be observed in order to provide the information that is required.

When Selection of the most appropriate times to conduct observation. This may involve selection through the use of a rigorous sampling methodology, or may, instead be based on a series of critical incidents (perhaps relating to service failure), specifically chosen to offer an insight into an issue that has already been identified as a problem.

Observation may take a number of different forms, ranging from the informal to the formal, but in all cases, it is important to be aware that physiological and psychological factors may determine the way in which an observer interprets their observations. Observers bring a range of preconceptions that influence the way in which they observe. Cross checking of these perceptions by using other methods of evaluation or investigation, or observation performed by other observers can reduce the likelihood of bias.

Approaches to observation

There are a number of different types of observation. The best choice depends on the questions to be answered, the objectives of the research, access to sources and the resources available for conducting the research.

The first categorisation that can be applied to observation is the divide into participant and non-participant observation.

Participant observation is when the researcher engages in the leisure environment. Most commonly, the researcher will be a customer, but they may also participate as a member of service staff. The benefit of participant observation is that
the researcher can experience the process, including the integration of a number of components in the service experience, and the emotions associated with the experience. It is important, however that the observer can be objective, and recognise, for example, that just because the big dipper makes them feel sick, this sensation is not shared by everyone! One disadvantage is the difficulty of recording the experience unobtrusively as it unfolds.

Participant observation may be assisted through the use of a structured walk through technique. This approach involves the design of a number of walk through frames which sample the range of different experiences that a customer might encounter in a complex leisure facility. It recognises that each customer selects the elements of the facility in which they choose to participate, and allows the researcher to experience a range of such combinations, and to evaluate a total experience, rather than a series of individual service episodes which may be disaggregated.

Non-participant observation is where the researcher ‘stands to one side’ and views the experience or the environment. This can be achieved through direct or indirect observation. Direct observation is useful for looking at facilities and also for identifying problem situations. The observer can take notes as they observe. There are however three main disadvantages of direct observation:

* It is very difficult to conduct unobtrusive observations; the sense of being watched may influence people’s actions.
* Notes will be selective and subjective, and unless the types of actions to be noted are carefully specified in advance, it is likely that the note keeping may be somewhat random, since it is difficult to distinguish key activities.
* Cognitive information, such as attitudes, beliefs, motivation or perceptions can not be observed.

This last limitation can be overcome by the observer asking questions, subsequent to the observation.

Indirect observation avoids any sense of subjects or participants being watched. This is normally achieved through the use of video cameras. In a retail or leisure facility these cameras might be the security cameras. Video logging yields a permanent record which can be revisited and reviewed by others in addition to the original observer, and in addition, may not require the researchers presence on site. A key issue with video logging is the decision about when to take observations. The most pressing issue with video logging, however, is the analysis; this can be time consuming, and certainly needs to be conducted with the aid of a structured list of the features that are being sought. More privileged researchers may also be able to enhance a video log by asking those featured on the log (staff or customers) to comment on the video at a later stage. This is likely to be more feasible with staff than with customers.

The second main categorisation of observation is into covert and overt. Overt observation is where the researcher acknowledges either to the customer or the service provider that they are being watched. Covert observation is where observation is performed without the knowledge of possibly interested third parties,
and specifically without the knowledge of those being observed. Overt observation may lead to the observed changing their activities or responses, because they are aware that they are being observed. Covert observation should not influence the observed. However, if managers agree to covert observation, as, for example, in the mystery shopper model, staff and any customers who come to realise that they were part of such a study can be very upset, even if they were not the targets of the study.

Such responses to being observed are related to the ethical issues of observing people without their knowledge. We might agree that sensitivities around this may depend upon what the people were doing when they were being observed! But, it is not as simple as that! However well staff are performing, they may feel an implied criticism if their managers set up an experience which involves observation. Similarly, it might be presumed that customers at a zoo would not object to being filmed walking through animal enclosures - but their response may depend on whether they are in the company of the people that they are supposed to be with, or whether they are contravening previously declared ethical stances on keeping animals in captivity by visiting such an attraction.

The third main categorisation is whether observation is structured or unstructured. The advantages of structuring observation have been alluded to above. Structured observation requires less extensive data collection, since the observer only notes those incidents, or aspects of incidents that are of particular interest to the subject being observed; in turn, this facilitates data analysis. However, the structure needs to come from somewhere. This may be from a literature review, (in other words, work conducted by other people in similar contexts), or previous work by the same researcher or organisation. If no previously tried and tested framework, which can provide a structure is available, then it may be necessary to develop some questions or characteristics that can be used to impose a structure on the observation. One way of doing this is to conduct a ‘pilot investigation’ that uses unstructured observation.

Case Studies

The case studies which follow illustrate how observation can be used effectively in the study of leisure environments. All of these studies yield useful information in their own right, based on observation alone. On the other hand, all could be further extended through the use of other data collection methodologies, such as interviews and questionnaires, completed by either front line staff, and managers or customers.

1. Basic Observation of the Operation of an Innovative Facility.

This small scale, but informative study was conducted using covert, participant observation. This process allowed the researcher to note the way in which a smart card had been implemented in a leisure facility, and to reflect on the effectiveness of its operation. The researcher brought to the observation, knowledge of the technology and possibilities of smart cards, and experience of similar leisure facilities. This allowed the researcher to identify this as a novel application of smart cards, and also enabled the researcher to compare the customer experience of comparable operations with the use of the smart card and without the use of the smart card. In relation to the management of the leisure facility, the researcher
was a neutral observer, with no specific agenda around the effectiveness or otherwise of this innovation. The researcher observed the use of the customer identity card. The card is mailed to customers a few days prior to their visit to a Holiday Village. The card eliminates the need for customers and the organisers to deal with cash, cheques and assorted credit and debit cards. It also acts as an entry key for lodges. This card and the associated customer information that is held in the databases, has the following favourable effects on the customer service experience:

* Queues of cars on arrival on check-in days are minimised because the welcome check-in transaction can be actioned speedily, and without the driver moving out of their car. The check-in clerk can provide information on whether other members of the party have already checked in.

* Queues for bicycle hire and collection can be avoided through pre-booking; bicycles are then delivered to villas.

* Customers, using their card number, and villa address can make bookings and execute associated financial transactions for activities such as badminton or table tennis from their villa.

* Customers do not need to carry anything other than their card, so that villa keys, cash, other credit cards and cheques are rendered unnecessary.

The researcher was also able to note the problems with this system. These included:

* A court booking system that did not use real time updating, this allowing double booking of one facility when bookings were entered from different workstations

* The viewdata system, which showed the previous day’s events

* Aspects of the system ceased to be fully functional when the volume of customers entered exceeded its capacity.

Full interpretation of systems failures, depended upon the researchers’ knowledge of computer systems, and, at times, on her ability to phrase questions which were deemed to be acceptable coming from her as a customer, but which nevertheless yielded further insight into the nature of the technical problem.

2. Examination of the aspects of the Customer Experience in Airport Departure Lounges

This piece of research was again conducted by participant observation, with two researchers working together. The observation evolved over a period of time. Its objective was to develop a model of the customer experience in airport departure lounges, which had global applicability. This model might then be used by other researchers in this area to help them to formulate their enquiries concerning the service experience in this context, and to compare this context with others, such as that associated with shopping malls, and other leisure facilities in which waiting is a significant feature of the experience. In addition, the research generated a checklist and range of perspectives on the customer experience, which might be
useful to airport managers in evaluating and developing the customer experience.

A post-hoc structure can be imposed on the process of observation, although it should be emphasised that this is not how the observation was conceptualised by the researchers at the time:

1. Researchers were waiting in an airport departure lounge, and started to observe the facilities and experience in that lounge, and noted that the experience had a unique timelessness and placelessness about it, in that similar experiences were possibly replicated in other airport lounges. This initial interest was informed by acquaintance with the literature on the service experience, and its evaluation.

2. The researchers started to make a checklist of the features that contributed to the experience. Particular note was taken of any aspects of the experience that might heighten the sense of timelessness and placelessness, such as the availability of internationally branded goods, and the sense of being in transit between time zones. This check-list was then roughly ordered into groups, in accordance with the features that the literature discusses as being significant components in the service experience.

3. This checklist of categories was used to guide structured observation, and corresponding notetaking at a range of other airports visited by the researchers on their travels over the subsequent few months. Most of these subsequent observations were performed by one observer. Any leaflets on the facilities on offer were also collected.

4. The data collected was analysed using the original framework of categories, but noting any cases where the categories needed extension or refinement. The literature on the service experience was revisited in order to check whether the data gathered offered any insights that were additional to those identified at the original data collection stage. Specifically, this work was expected to add a perspective on the service experience in a context that had not been specifically studied previously, and which had unique global dimensions. A model was proposed which summarised the dimensions of the service experience in airport departure lounges. This might be further tested through interviews with customers and managers.

Conclusion

Observation is often overlooked as a data collection methodology. This article has explored some of the hazards and opportunities associated with observation. The development and application of observational strategies is illustrated through two case studies in leisure environments. We conclude with a checklist of factors that need to be taken into account when using observation as a basis for data collection and analysis:

1. Gather and make use of as much contextual knowledge as possible about the situation under observation.
2. Be aware of the question or the problem to which a solution is being sought. Formulate objectives clearly and explicitly.

3. Seek ways of structuring observation.

4. Be alert to the potential for bias, and take all opportunities to cross check data.

5. Be alert to the potential for influencing behaviour and take any measures possible to minimise the effect of the observer.

6. Consider ethical issues, and clear these by asking appropriate permission wherever possible.