Observations

# Definition

This method consists in observing the target user of the future system in their natural workplace or home in order to find out how they work, which are their tasks and their environment. Observation is essential especially during the user research phase but also in a later stage when the system is actually used. It mainly allows collecting qualitative data by the observer that takes notes and/or audio-/video- records the activities focusing on aspects that are interesting for the design process. The observation can be direct (the observer is actually present in the user environment) or indirect (the users, their tasks and environment are videorecorded).

# Benefits

**Direct observation**

Advantages:

* gives the investigator a rapid insight of the user, his/her tasks and his/her environment
* allows to focus the attention on specific aspects
* produces always interesting data
* it is always worth doing it
* it is cheaper than indirect observation

Disadvantages:

* even if the investigator takes notes, it is difficult to have a complete vision of the user activity by observing it only once
* there is no opportunity to reconsider the decision of the observer about what he/she evaluated as more or less important
* it is considered quite obtrusive and could change the natural behaviour and performance of the users

**Indirect observation**

Advantages:

* the observations are recorded permanently and thus it is possible to review it
* there is more distance between the observer and the users, meaning more objectivity
* it records activities that may be missed if performing indirect observation

Disadvantages:

* a large amount of data meaning long time to analyse them
* users will be aware that someone is recording them and this can change their behaviour

# Best practices

In order to perform a good observation session, it is advisable to plan it properly before actually running it and clearly report the findings after having run it.

The best practices to perform observation are taken from usabilitynet.org[[1]](#footnote-1) web site.

### Planning

1. Establish objectives and information requirements. Should the coverage be in breadth or in depth? It is extremely important to decide what will happen to the end-product of this process, and to tailor the whole process to the requirements of those who will receive the results
2. Gain co-operation of contacts with the observation technique that you intend to carry out. Establish the times, places, and people who will be observed. Note that in some countries the law may prohibit you from taking video films of people without their explicit written consent.
3. Decide on the recording technique you will use. Will you rely on hand-written notes (traditional), audio, or video and audio records? Note that the more complete your record, the longer it takes to analyse. It is useful to be able to make some kind of first-cut analysis during observation.

Recommendations when deciding to perform indirect observation:

* leave the recording equipment some days before starting to record in order to make the users accustomed to the camera
* decide how and when start and stop recording
* label recording in order to catalog it, where to locate the equipment

### Running

* Make sure that those being observed are aware of the reason for your study and that they do not see you in negative terms. This is particularly important for mentally impaired and blind users who may be disturbed by a passive presence that they are not sure about.
* Run a pilot observation session to get a feel for what to expect and to test out any observation sheets. This will also help to judge how long the observation session needs to be. If the session involves informal activities with the general public, they may wish to converse with the observer. Make sure that there is enough time for this.
* Try to be as unobtrusive as possible. Do not let yourself or your equipment get in the way.
* Note down any events that you do not understand and try to clarify them with the user as soon as the session is completed.
* Try to be aware of the range of influences that are affecting the user.
* If possible photograph the users work area or the area of operation as this will act as a reminder of the environmental context.
* After your observations, write down your first impressions before the analysis stage later on.

### Reporting

* Analyse, summarise, and report in relation to the objectives set out at the start.

# examples

Sources

* book pp. 29-31
* <http://www.usabilitynet.org/tools/userobservation.htm>

1. <http://www.usabilitynet.org/tools/userobservation.htm> [↑](#footnote-ref-1)