euro-emotur

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Participant observation protocol

Euro-emotur D3.3

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Work Package 3: SMEs Anamnesis, Diagnostics and Assessment

Deliverable 3.3. Participant observation protocol

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1.WP3 main objectives, and tasks and the role of the participant observation tool

As defined in the Euro-Emotur project proposal, Work Package 3. aims at developing and implementing an in-depth investigation into the businesses that have been selected in Work Package 2, i.e., the recruitment of 100 tourism-related SMEs to be awarded financial support from the programme and be involved into the project activity to receive consultancy and training on the use of neuromarketing to improve their digital marketing. In particular, the set of these 100 SMEs for a total of 20 countries includes 20 SMEs from each pilot cluster (Canary Islands, Veneto, and Finland) and 40 from other countries, that will be selected according to quantitative and qualitative criteria set in WP2.

The in-depth investigation implemented in WP3 will allow to:

- check the state and the level of the SMEs digital technology transformation and of innovation uptake;
- assess their digital maturity to adopt new tools or to implement new strategic approaches supported by the knowledge created by the application of innovative tools;
- identify the critical factors that may make difficult or hamper the introduction of the innovation in online communication functions brought by the results of the *neuromarketing analysis*;
- identify the needs of the SMEs in terms of training to support them in the exploitation of the new knowledge and tools provided at the end of the project;
- help to define the content and target for the training;
- help to define the content of the communication plan provided to the SMEs as an output of the project, suggesting not only changes in the online communication approach but also changes needed for the organisation to fully exploit and sustain the innovative approach, after the end of the project.

The basis to conduct the investigation, collect the information, analyse the results, and provide recommendations for the neuromarketing consultancy and training activities has been developed by D.3.1. The methodology presented in D.3.1. was built upon other applied models used to assess SMEs digital maturity and ability to acquire and implement innovation, and it has identified a series of dimensions of the business - activity, strategy, culture, approach to technology, staff skills, barriers to a better use and to the implementation of new tools, etc - essential to understand how much a SME is digitally mature and what is its approach towards new knowledge. On this basis, the methodology developed a model to assess digital maturity and readiness specific for tourism SMEs.

Assessing how each of the 100 SMEs selected to take part into Euro-emotur project performs in relation to each of those dimensions will be essential to understand what they need and how to approach them to develop the tasks foreseen in WP 4 and following ones.

To collect the data and information useful to describe these dimensions and then to have a clear view of the current situation, the main tool is an online questionnaire that all the selected SMEs will need to fill in (D3.2). The possible answers to the questions are translated into a scoring system thus assessing how the business performs in relation to the dimensions identified as essential by the methodology. E.g., one of the essential dimensions of innovative businesses, identified and confirmed though various studies and applications, is good internal communication, based on informal contacts and channels. One of the questions in the online questionnaire will therefore ask the business if they encourage, tolerate, or discourage informal communication. The ones answering, they encourage it will obtain the maximum score for their answer, and this will then help define their overall score and performance about internal communication.

Although based upon previous experiences and studies and adapted to tourism SMEs, however, the questionnaire, being experimental, might not be, in the first stage, enough to gather the information and analyse the performance of the businesses, for different reasons:

- the interpretation of some questions/answers might be ambiguous.
- the business might want to “embellish” themselves, although the answers are created to not “betray” what their interpretation could be
- some dimensions explored might be not relevant for tourism SMEs as they are for other kind of SMEs.

To have a way to compare the answer to the questionnaire to real life behaviour and, therefore, to understand if the questionnaire is effective and if the scoring system linked to the questionnaire is precise enough in assessing the SMEs performance, two other tools have been devised:

- in-depth interviews to 60 SMEs located in the partners’ regions and addressed not only to the owner but to all the employees involved in the website and social media update and management;

- participant observation in 30 of the 60 SMEs involved in the previous step, 10 for each region. This method will support the previous one and the questionnaire to understand what actually happens in terms of processes, procedures, relationships within the business, and to overcome deflections, and “politically correct” answers.

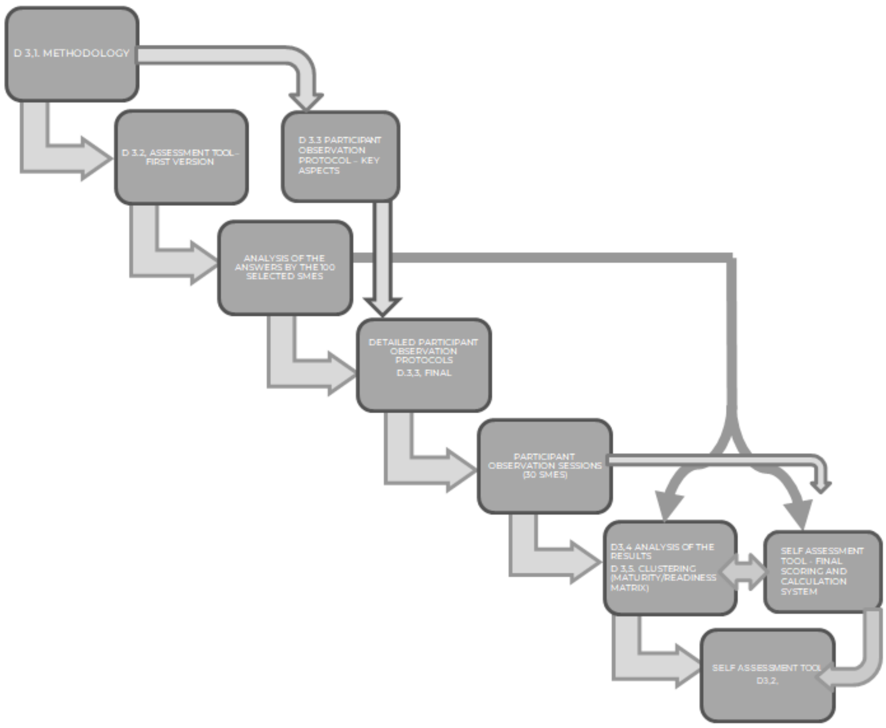
The results of the online questionnaire will be compared and combined with the results of the participant observation, and this will allow to:

- on the one hand, have a better understanding of each of the 30 business, but also provide, trough similarities, context to the answers given by the whole lot of 100 SMEs;
- on the other hand, assess the effectiveness of the online questionnaire, evaluating if some questions need to be changed, if the scoring system related to some set of answers has to be revised, and if some dimensions - and therefore the answers to a certain set of questions - are more important than others

Thank to this, the Euro-emotur partnership will have a very precise idea of each business and what might hamper the work and therefore to tune their work plans for WP 4 (Assistance to selected SMEs on neuromarketing and digital innovation) and WP5 (Digital Hub and specifically the Euro-Emotur Campus). Furthermore, the participant observation will allow to tune the online questionnaire and the scoring system (D.3.2.). Once tuned, they will be ready to become an independent self-assessment tool available to any European tourism business that wants to understand how they are performing in terms of digital maturity and readiness, and which are their strengths or aspects they need to improve.

As explained, then, participant observation will have an important role in tasks 3.2 and 3.2.

Figure 1. WP3 workflow and the role of participant observation



To unobtrusively observe and record data on behaviour and reactions, the participant observation will be based on an observation protocol here presented in its essential features. As stated in the Grant agreement, the participant observation protocol described here has been developed by CISET "to understand what actually happens in terms of processes, procedures, relationships within the business in a real-life situation. The protocol will be shared among the project partners to unobtrusively observe and record data on behaviour and reactions on a pre-defined sheet".

As it will be explained in the following paragraphs, the detailed protocol needs to be adapted to each kind of business (hotel, camping site, rental, travel agency, incoming tour operator, etc.) and the aspects to be observed need to be prioritised specifically for each business. This because it will be very difficult, given the time constraints, to observe every aspect related to digital marketing, ICT use, innovation openness, knowledge of neuromarketing, etc. Furthermore, the specific schedule for the observation needs to be agreed with each business.

Therefore, the following paragraphs presents the key aspects that are going to be the basis for detailed participant observation protocols, that will be delivered once the 100 SMEs are selected, and once more details will be available specifically on the SMEs selected from Veneto, Canary Islands, and Finland clusters.

In the following sections, the key elements of the different components that constitute an observation protocol are defined:

- Planning
- Aspects to observe
- Target behaviours
- Observation grid

2. The participant observation protocol: aim, general approach and key aspects of the protocol

Participant observation is a qualitative research method, whose goal is to help researchers observe how people behave in real life situations and understand their interpretation of events. The observation is done through isolated or concerted observation and participation in the daily activities of the study.

Born in the field of ethnography it has been widely used to study organisations, including corporations, hospitals, etc. small family business, Management Information Systems development, industrial engineering research, etc (Akroyd, 2004; Oliver&Easles, 2008; Nandhakumar& Jones, 2002[1]), and it particularly an

[1] Ackroyd, S. (2004). Methodology for management and organisation studies. *Critical realist applications in organisation and management studies*, 137-63

da silveira, E., Silva, R., & Sznelwar, L. I. (2012). The use of participant-observation protocol in an industrial engineering research. *Work*, *41*(Supplement 1), 120-126.

integral feature of action research, which can be said to be the method underlying the whole Euro-emotur project activities

As described in the previous section, the aims of participant observation within WP 3 are the following:

- supporting in the final definition of the self-assessment tool;
- better defining training needs and consultancy needs for every business.

The observation sessions, however, might also be useful to create a relationship with people within the business to build upon for the following steps of the project, where a high involvement of the selected businesses is required. It might be also useful to create a relationship with the digital service provider, which, given the kind of analysis and recommendation foreseen in WP4 (design and content of the website or digital marketing content), can be a key figure to involve.

In order to create a relationship based on trust, the approach chosen for the participant observation to be conducted within the Euro-Emotur project is an **overt passive observation** one. The approach will also be **structured** as the project needs to compare results of different observations and observers to detect similarities and to use the observation results to tune the assessment tool (D3.2) and to cluster the business according to the maturity/readiness matrix (D3.5). Using a structured observation approach, it would also be advisable that the observation sessions are conducted by at least 2 different researchers for each regional group of businesses in order to compare their personal interpretation of the behaviours observed and see if they see it from the same perspective.

Even if the participant observation tool is developed to be used mainly for the afore mentioned aims within WP3, it also presents the advantage to provide a tool that could also be used within other WPs for an ongoing monitoring of the reactions within the businesses about the introduction and implementation of neuromarketing tools and techniques. Therefore, the protocol will be useful not only in the diagnostic steps (WP3) of the project but also for the following ones implementing innovation within the selected SMEs.

3. Planning

Nandhakumar, J., & Jones, M. (2002). Development gain? Participant observation in interpretive management information systems research. *Qualitative Research*, 2(3), 323-341.

Oliver, J., & Eales, K. (2008). Research ethics: Re-evaluating the consequentialist perspective of using covert participant observation in management research. *Qualitative Market Research: An International Journal*.

3.1. Key aspects to consider for the planning

The planning of the observation sessions has to be agreed with each business according to the following vincula:

- Workflow and client's inflow: if possible, it is important to schedule sessions both in a period where the workflow is intense and when it slows down: it might be different days during the week, a holiday/not holiday period for the accommodations, a moment of booking peak or defining the offer and the suppliers contracts for the intermediaries, etc. according to the kind of business)
- Critical HR presence: it will be essential to be present when key people for the aspects to observe (see following section) such as the digital marketing manager, is working in the offices/hotel/etc. (Some people might be smart working or working as consultants)
- Sequentially: the participant observation needs to be realised once the online survey for the maturity/readiness assessment is completed by the business representative, as one of its aims is verifying if the answers to the questions are reflected in the actual processes and organisational structure
- Possibility to observe during "critical" events such as:
    - meetings of the digital team or of the "owner/CEO with the digital marketing responsible
    - meetings with the digital provider
    - meetings where important decisions about the digital marketing campaign or the website are made (budgets, re-design of the website, changes reg. the booking engine etc.)
    - Meetings where important decisions about the introduction of new software are made
    - (If possible) introduction of new software and training on it;
- At least 4 sessions must be planned + the exploratory visit (see 3.2);
- Time constraint: in order to provide results in time to complete the maturity/readiness assessment (D3.5), at least a first part the observation (exploratory visit+ at least 1 session) has to be conducted within 1 month from the official selection of the SMEs that will participate in the project, and the whole of it within a 2-month period.

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3.2. Exploratory visit and definition of the specific planning session

The researcher/s responsible to conduct the observation for each partner has to schedule an explorative visit, where they will interview the person identified to manage the Euro-emotur project within the business and/or the people in charge of activities and processes related to the website and digital marketing. In this way the exploratory visit will be the chance to

- conduct the in-depth interview directly on the field for the 30 SMEs involved int the participant observation activities;
- familiarise with the business spaces, services, etc
- be introduced to the staff and get to know “who’s who”
- start to unobtrusively be observing some activities or interaction
- agree the schedule for the various observation sessions keeping in mind what is requested in the previous paragraph.

4. Aspects to observe – Categories Systems

As underlined, the main aim of the participant observation is to complete, support and verify the results of the maturity/assessment questionnaires, and to better understand the neuromarketing consultancy and training need of each business. Therefore, participant observation results will also complete the identification of potential barriers to the transfer of innovation as assessed by the questionnaire (D3.2).

For these reasons, the specific aspect/s to focus on during the participant observation will be defined for each kind of business (travel agency, hotel, camping, etc.) and adapted to each specific business, if needed, on the basis of their answer to the maturity/readiness questionnaire. More in detail, participant observation session are going to:

- better explore aspects that emerge as potentially critical from the questionnaire answers;
- clarify ambiguities: contrasting or inconsistent answers;
- compare answers with actual behaviours to verify they are not “embellished”;
- get a better insight of the organisation culture.

Therefore, the categories of “events” to observe for each business will be defined, based on the criteria listed above, by CISET and the partner in charge of the observation for each region (Veneto, Canary Island, Finland) before the exploratory visit and, if needed, revised after it.

However, it is already possible to design a first general list of the aspects that could be observed during the sessions transversally to the kind of business. This list is consistent to the aspects explored by questionnaire (Strategy and leadership, Digital enabler’s role, external communication, personnel skills, etc.) and to the dimensions to be assessed according to the methodology (see D 3.2 and D3.1):

- decision making related to the website, digital marketing activities, ICT development;
- relationship with the digital service provider;
- distribution of employees between functions/areas and rotations;
- integration of digital tools/automation into the daily activities;

- clients behaviour in relationship with IoT, in house Apps, website etc.
- internal communication nature and flow;
- priority assigned to clients data collection and analysis;
- priority assigned to website and digital marketing activities;
- role and internal network of the people who are in charge of managing the Euro-emotur activities within the business and to keep in touch with the project partnership;
- role of digital marketing/digital solutions team/responsible;
- who are the people possessing/controlling critical knowledge (digital marketing or, if present, neuromarketing) and what is their role;
- product development procedures;
- decision making process, especially regarding the website and digital tools or digital marketing activities;
- role of data different from economic ones in the decision making;
- priority assigned to digital tools, digital activities, etc, in the strategy/investments priorities.

Among the ones listed, the categories to be observed will be prioritised based on:

- the first profile of the business as innovator/laggard, etc. as it emerges from the questionnaire (D3.2) answers;
- critical aspects emerging from the same questionnaire (potential problems with internal communication, no digital marketing KPIs, poor collection of data, etc.);
- specific innovative aspects or good practices emerging form the same source;
- existing/non-existing knowledge/use of neuromarketing tools or solutions;
- level of internal control of the digital marketing activities (e.g., if everything is outsourced and controlled by the digital providers it could be better to focus on understanding why it is so);
- level of integration of digital tools/supports/automation systems into the business activity.

5. Target behaviours

Similarly to the aspects, the behaviours to be observed will be defined for each kind of business and adapted to each specific business on the basis of the answers they provided to the questions of the Maturity/readiness questionnaire (D3.2), and furthermore on the basis of the priority categories to be analysed defined as described in the previous paragraphs.

According to the different categories, behaviours to be observed might be, for example:

- how are existing digital tools different from PMS basic functions and Office tools used during everyday activities: focus on the booking, front office, website and sales activities (the priority will be defined according to the kind of tools the business declared to use or to have invested into, especially if they use automation systems, apps, etc.)?
- are client's data different from the ones provided automatically from the channel manager recorded, how often (focus: booking, front office, revenue management, or others according to the kind of business)?
- do clients use/interact with IoT tools, apps, virtual assistants, etc. – this can be explored both from observation and by analysing the systems log and data collected by the system
- how do the people in charge of the Euro-emotur project within the business interact with the senior management? Do they ask for a formal meeting by e-mail? Do they speak freely? Are they invited to express their opinions?
- Do the CEO/Owner/senior managers involve the digital marketing team/responsible in decision made about digital marketing?
- How often do the CEO/Owner/senior managers receive or ask for data coming from web/social media analytics, revenue management systems, etc.? Is there an established procedure about it?
- How much do data analysis impact on decisions about the website, digital marketing?
- How much do clients' reviews, opinions, suggestion or behaviours impact on decision about new offers/products?

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6. The observation grid

Once established which are the primary categories to be observed during the various sessions and the target behaviours, each Euro-emotur partner in charge of the observation activity will develop with CISET an observation grid for each business and target behaviour.

The grid will not only be used to record the events but also to write down the observers notes and the business "internal" interpretation of what happened, which can be collected asking for a brief comment on how a meeting worked, if they find the decisions made useful for the future, etc.

Table 1. Observation grid example

Aspect: Decision making process **Behaviour: Do the CEO/owner/Senior manager take into consideration the digital marketing team when making important decisions about the website, digital marketing strategy, etc.**

Date:	
Time	
People	
Place	
What happened 1 (observed behaviour)	
What happened 2 (reactions to the observed behaviour by the initially passive people)	
Observer's notes	
Business interpretation 1: is what happened typical or an exception	
Business interpretation 2: Comment	

7. Data protection

In the process of observing and analysing businesses, the Euro-emotur partnership will inevitably acquire different personal data about natural persons such as employees, owners, consultants. The information acquired will be names, contacts, but also opinions, ideas and incidentally other kinds of data concerning health, social identity or religious beliefs, etc. These data will be treated for the only purpose of research and analysis, i.e. to carry on the activities of WP3.

Information about the kind of data collected, the purpose and modality of their processing, their preservation time, rights of access, rectification, deletion, limitation, portability will be provided to the businesses and the people involved in the project activity and written consent will be acquired before proceeding with the activities. The data controller is the Euro-Emotour consortium.

In any case personal data acquired during the participant observation will not be disclosed or made accessible to any third party. The reports on the participant observation included in the final report D 3.4, will share the results of the analysis as much as possible in an aggregated way and, in any case, in a way that does not directly identify any natural person. The same information might be processed and shared as aggregated and/or pseudo-anonymised information by the Euro-emotur consortium to develop other activities of the project.

The personal data acquired will be kept only for the duration of the Euro-emotur project. Subsequently, only the aggregated and pseudorandomised information will be retained by the consortium partners and processed for research or publication purposes.

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Each consortium partner will apply the appropriate measures for the purposes of processing and keeping the data after the end of the project (January 2025), using the technical and organisational tools and procedures for data protection established by their own organisation.