

## **Disguised Observation: A Methodological Tool for Uncovering Grounded Realities**

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### **Abstract**

This paper examines disguised observation as a qualitative research tool, emphasizing its methodological significance and practical application in uncovering grounded realities across various disciplines such as psychology, sociology, anthropology, and management. By conducting an extensive literature review across various fields such as Psychology, Sociology, Management, Education, Marketing etc. the study traces the historical origins, theoretical bases, and practical uses of disguised observation. Reviewing 35 journal articles published in between the 1920s and 2023, the study identifies and discusses various methodologies and approaches to disguised observation. The reviewing and discussions highlights how disguised observation reveals genuine behavioural patterns, providing valuable insights into organizational dynamics and social interactions. Ethical concerns, especially surrounding informed consent and privacy, are addressed, emphasizing the need for balance between methodological rigor and ethical responsibilities. This paper advocates for the broader use of disguised observation in research, where hidden dynamics often go unobserved with traditional methods. The conclusion calls for broader adoption of disguised observation methods, recognizing both its advantages and challenges in uncovering hidden dynamics within different discipline.

**Keywords:** *Disguised observation, qualitative research, grounded reality, methodological tool*

## Introduction

Observation is a widely acknowledged and powerful method in social science research, enabling researchers to collect detailed information about social realities that are difficult to measure through numbers or statistics (Lauder, 2003). Simpson and Tuson (2003) explain that observation is a powerful method and tools for getting truthful information and understandings into particular issues. It involves systematically watching, listening, and recording various aspects such as people, behaviors, events, surroundings, objects, and patterns. Through observation, researchers can gain truthful insights into specific issues by carefully examining visible behavior in natural environments. Observation not only allows researchers to collect data but also to understand cultures from the perspective of the people being studied (Gorman & Clayton, 2005; Spradley, 1980). This method, especially in social science, offers a way to immerse in daily life, listening, asking questions, and observing over time to understand populations more deeply (Edgerton, 1984).

Observational research can be conducted in various ways, depending on the research structure, the degree of revelation, the naturalness of the setting, the level of participation by the researcher, and whether the observation is done overtly or covertly (Lancaster, 2005). Jex and Britt (2008) outlined three different observational methods: simple observation, archival data sources, and participant observation. In simple observation, the researcher watches and records behavior as it happens naturally. Archival data sources involve using existing data or records for research. Participant observation is like simple observation, but in this method, the researcher also takes part in the activity or event they are studying. Brancati (2018) explains that, participant observation can vary depending on whether the researcher is open about their role or not. In open participant observation, the researcher makes it clear to everyone involved that they are there to study them. On the other hand, in disguised observation, the researcher hides the fact that they are observing and studying the group, keeping their presence and true purpose a secret.

Disguised observation has its origins in anthropology, where it emerged as a fundamental method for studying cultures and societies. Brewer (2000) states that, over time, this method expanded beyond anthropology and found application in other disciplines, including sociology, psychology, education, and communication studies. Disguised

observation has important contribution in qualitative research and it is assumed to be emerged from 1920s. Malinowski (2022) in his work, in the Trobriand Islands of Papua New Guinea, particularly his study *Argonauts of the Western Pacific*, involved immersive participation in the community's daily life and rituals while hiding his status as a researcher. This approach allowed him to gain insights into the culture and social dynamics of the Trobriand Islanders. Whyte W. F. (1939) studied how people in Boston's North End neighborhood interacted. He watched them without knowing them, to see how they acted on the streets and in groups. He found that friendships, groups, and informal jobs were really important in their lives. In the 1950s and 1960s, the School of Chicago popularized studies that utilized disguised observation in the field of sociology (Bulmer, 1986).

Sudnow (1967) looked at how people interacted in hospitals when someone was dying. He watched quietly to see how people talked and behaved. His work helped us understand more about how we deal with death and dying. Humphreys (1975) watched men secretly to see how they acted in public bathrooms. He found out about the risks and social dynamics of their behavior, helping us understand more about human sexuality and public spaces. Disguised observation has been employed to investigate a myriad of management challenges, ranging from leadership dynamics and organizational culture to workplace deviance and conflict resolution. Kozinets (2002) introduced a new way of studying people online without them knowing. This helped us learn more about how people behave and interact in online communities. Weitzer & Tuch (2004) quietly watched people to see how their race affected how they saw police behavior. They found that people's race affected how they felt about police, showing that race is a big factor in how people see the police. Its real-world applications have proven invaluable in informing evidence-based management practices across diverse industries (Eisenhardt & Graebner, 2007).

Disguised observation have been used in various studies, there is still a gap in understanding their full potential within organizational settings and complex social structures. Although people often change their behavior when they know they are being observed, disguised observation allows researchers to observe groups and individuals without this bias, as they remain unaware of being studied (Eisenhardt & Graebner, 2007). Disguised observation involves the researcher maintaining secrecy about their role, thus avoiding influencing the behavior of those being studied (Owens, 2009). Despite its potential, there has

been limited research exploring how disguised observation can offer unique insights, especially when applied to organizations where revealing genuine, day-to-day practices can be challenging (Kunda, 1995).

The disguised approach gives researchers a unique way to understand how organizations really operate, helping them uncover the true, unfiltered situations that might be hidden when people are aware they're being observed and may act differently (Kunda, 1995). Disguised observation in qualitative research means secretly watching people, groups, or activities in organizations to understand how they truly behave and interact without them knowing they're being observed. This approach helps to reveal genuine behaviors and social dynamics (Maanen, 1979). Denzin & Lincoln (2018) states that, this method holds significance in qualitative research, as it provides access to rich, contextually embedded data that can inform theory development and practical decision-making so further exploration is needed to fully understand its applications and implications.

### **Objectives of the Research**

The purpose of this article is to highlight the methodological and theoretical significance of disguised observation as a means of uncovering grounded realities. By combining existing literature and empirical evidence, the article seeks to explain the role of disguised observation in qualitative management research and advocate for its wider adoption among scholars and practitioners, particularly in uncovering real-world, grounded phenomena.

### **Methods**

This work involved compiling and analyzing 35 journal articles from different discipline. These article covers the fields, such as psychology, sociology, management, education, marketing, etc. to provide a broader representation of academic writing. Out of 35 article, 7 article are from Psychology, 14 from Sociology, 5 from Management, 3 from marketing and remaining 6 from different other discipline.

Selected articles were analyzed following the structure IMRDC (Introduction, Methods, Results, Discussion and conclusion) commonly used in academic writing. During the analysis of the articles, it became evident that many research articles did not strictly

adhere to the IMRDC structure. This lack of conformity highlighted certain deficiencies in article writing. Article published from 1920s to 2023 have been taken into consideration.

Disguised observation is a qualitative in nature that describes a researcher discovering sometimes in real ground without revealing the presence of researcher (Vinten, 1994). It involves a systematic review and thematic analysis of existing literature, focusing on how disguised observation is applied in different research settings to uncover natural behaviors.

### **Ethical Implications**

Disguised observation, where researchers observe subjects without their knowledge, poses ethical challenges, particularly about informed consent and privacy (Li, 2008). One major ethical issue with disguised observation is that it avoids the need for informed consent, which is important because it respects people's right to choose whether or not to participate in research (Orb et al., 2001). Orb et al., (2000) further state that, disguised observation escapes this principle, and is fundamentally unethical, as it invades participants' privacy. This perspective is vibrated by other scholars who highlight that ethical research should prioritize transparency and participant awareness (MacLean et al., 2023).

The risk of causing harm is another important issue in disguised observation because researchers might accidentally put participants in danger, especially in sensitive situations or with vulnerable groups. For example, when researchers were found observing public opinions during an election, it led to problems and potential hostile response (Podschuweit, 2021). This highlights the need for researchers to consider the implications of their methods not only for the integrity of their research but also for the well-being of the subjects involved.

Covert observation involves hiding the researcher's actual role, which can reduce trust. If participants later learn they were observed without their knowledge, it might lead to feelings of being deceived (Marzano, 2022). Furthermore, the presence of an observer, even in a hidden role, can unintentionally affect how subjects behave, raising doubts about the accuracy and trustworthiness of the collected data. Researchers need to make sure that their covert approach doesn't result in biased outcomes (Schwartz & Schwartz, 1955).

In conclusion, while covert observation can offer useful insights, it comes with significant ethical challenges. Issues like informed consent, minimizing harm, and being sensitive to the context are crucial when deciding if this method is appropriate. Researchers must carefully balance gaining knowledge with their ethical duties to participants, ensuring their methods meet ethical guidelines.

### **Grounded Reality and the Role of Participant Observation**

Grounded reality refers to the "authentic, contextually situated experiences and perspectives" of individuals within their natural environment (Charmaz, 2006). She further explains that the grounded reality encompasses the "complex interplay of social, cultural, and environmental factors" that shape human behavior and interaction. Participant observation plays a crucial role in uncovering grounded reality by facilitating direct engagement with the social world under study (Denzin & Lincoln, 2018). Denzin and Lincoln (2018) reveals that through sustained observation and interaction, researchers gain firsthand insights into the "everyday practices, norms, and beliefs" of the researched community. This immersive approach enables researchers to capture the "subjective meanings and interpretations" attributed to actions and interactions, thus revealing the underlying realities that inform social life.

### **Results**

The reviewed articles reveal diverse findings and outcomes regarding the use of disguised observation in various fields such as psychology, sociology, anthropology, and organizational studies. Watson (1920) concludes that, direct observation of behavioral responses could provide valuable insights into cognitive processes, especially when subjects are unaware of being observed. Whyte (1943) uncovered complex social structures within urban environments. This study contributed to understanding how community ties influence individual behavior and social cohesion. Individuals constantly negotiate their identities and roles depending on the social context, revealing a strong connection between behavior and social structure, emphasizing the importance of situational behavior (Goffman, 1952).

According to Eisenhardt (1989) disguised observation serves as a secret method for researchers to penetrate organizational environments, enabling the observation of behaviors, interactions, and processes without alerting subjects to their scrutiny. Rooted in ethnographic

traditions, disguised observation allows researchers to access authentic data by immersing themselves in the daily activities of organizations, thereby uncovering grounded realities that may be obscured by self-presentation biases in overt observation settings (Kunda, 1995).

The theoretical foundations of disguised observation are grounded in symbolic interactionism, which suggests that individuals' behaviors and interactions are shaped by shared meanings and social norms within their environment (Bulmer, 1986). Key principles underlying disguised observation include the notion of participant-observer role ambiguity, wherein researchers conceal their true identity and purpose to minimize reactivity and obtain unfiltered data (Maanen, 1979). Furthermore, Gioia and Pitre (1990) argues that disguised observation collects data based upon the principles of naturalism and environmental validity, and captures the behaviors in their natural context without disrupting the normal flow of life.

Whyte (1943) states that, various models and approaches exist for conducting disguised observation, each tailored to the specific context and objectives of the research. According to Adler and Adler (1987) non-participant observation is also one of the method which observes from a distance or through indirect means to avoid detection. These approaches find applicability in management contexts by providing insights into leadership dynamics, organizational culture, and decision-making processes (Sutton & Staw, 1995).

One notable case study demonstrating the application of disguised observation in management research is the study conducted by Whyte (1943) on the social organization of a street corner gang. By immersing himself in the group's activities under the guise of a sympathetic outsider, Whyte was able to uncover the complicated social structures and norms that governed their behavior. Similarly, studies in organizational settings have utilized disguised observation to investigate phenomena such as workplace deviance, organizational change, and conflict resolution (Gioia & Pitre, 1990). In the realm of social sciences and behavioral research, a rich studies has emerged, each contributing unique insights into human behavior and societal dynamics. Early pioneers like Watson (1920) laid the foundation by investigating into psychological phenomena, revealing the complex workings of human cognition through disguised observation. Subsequent researchers, such as Whyte (1943) and Goffman (1952) explored urban communities and social interactions, respectively, unveiling the complexities of everyday life and the nature of social behavior. These studies not only

deepened our understanding of human psychology and social dynamics but also pioneered disguised observation techniques that became integral to qualitative research methodologies.

As society evolved, so did the focus of research. Scholars like Becker (1953) and Ditton (1969) investigated into different behavior and criminal subcultures, shedding light on the social construction of deviance and the symbolic meanings attached to criminal behavior. Erving Goffman (1969) revolutionized the study of social interaction by revealing how individuals manage impressions and negotiate identities, contributing to the field of symbolic interactionism. These studies expanded the scope of qualitative research, emphasizing the importance of context and cultural understanding in interpreting human behavior. In organizational settings, researchers like Maanen (1979) and Eisenhardt (1989) employed disguised observation to uncover informal norms and networks influencing workplace behavior and decision-making processes. Their work provided valuable insights into organizational dynamics and culture, highlighting the role of social structures in shaping organizational outcomes. Similarly, studies by Gioia and Pitre (1990) and Sutton and Staw (1995) explored organizational culture and social dynamics, offering nuanced perspectives on factors influencing organizational behavior.

Beyond organizational settings, researchers like Herrera (1999) and Lauder (2003) undertook into public spaces and educational settings, observing social interaction dynamics and their impact on behavior and learning outcomes. Meanwhile, scholars like Baker (2006) and Amanda and Broderick (2007) examined human behavior within various social contexts, uncovering motivations and influences that shape individual and consumer choices. These studies not only enriched our understanding of social phenomena but also demonstrated the versatility and applicability of disguised observation across diverse research domains. In media studies and sociology, researchers such as Altheide (2009) and Bryman (2016) explored media representations and group dynamics, respectively, offering insights into narrative construction and social influence processes. Recent works by Roulet et al., (2017) further illuminated hidden dynamics within organizations, emphasizing the interplay between formal structures and informal practices in shaping organizational culture and behavior. Collectively, these studies represent a mosaic of insights gleaned through disguised observation, enriching our understanding of human behavior, societal dynamics, and organizational phenomena across various contexts and disciplines.



## Discussions

Disguised observation as a research method in social sciences is complex and plays an essential role in understanding real-world situations in various settings. This approach, by looking at its historical development, theoretical foundations, and practical uses, shows how valuable it is for revealing genuine behaviors and social interactions within organizations. The method allows researchers to observe how people truly act without influencing their behavior, providing deeper insights into the realities of social dynamics that might otherwise remain hidden. The idea of disguised observation has its origins in early anthropological research. For instance, the famous anthropologist Bronislaw Malinowski conducted detailed studies of the Trobriand Islanders by fully immersing himself in their daily lives. This method of secretly observing people while becoming a part of their community highlights how disguised observation began in ethnographic research traditions (Malinowski, 2022). Subsequent studies in sociology, psychology, and management further expanded the application of disguised observation, demonstrating its versatility across disciplines and research domains. Early pioneers like Whyte and Goffman pioneered disguised observation techniques, setting the stage for subsequent researchers to research into diverse social phenomena and organizational dynamics (Whyte, 1943; Goffman, 1952, 1969).

Theoretical foundations of disguised observation are grounded in symbolic interactionism, emphasizing the role of shared meanings and social norms in shaping human behavior. By adopting a participant-observer role ambiguity, researchers conceal their true identity and purpose to minimize reactivity and obtain unfiltered data (Bulmer, 1986). This methodological approach aligns with naturalism principles, capturing behaviors in their natural context without disrupting the normal flow of life (Gioia & Pitre, 1990). Furthermore, disguised observation allows for the exploration of hidden dynamics and informal networks within organizations, offering valuable insights into organizational culture, leadership dynamics, and decision-making processes (Eisenhardt, 1989).

Disguised observation holds particular significance in qualitative research, providing access to rich, contextually embedded data that can inform theory development and practical decision-making. By immersing themselves in the daily activities of organizations, researchers gain firsthand insights into the subjective meanings and interpretations attributed

to actions and interactions (Denzin & Lincoln, 2018). This immersive approach enables researchers to capture the complexities of social life, uncovering grounded realities that may be obscured by self-presentation biases in overt observation settings.

Disguised observation provides a unique way to understand how organizations truly operate by uncovering the raw, unfiltered realities that might be hidden when people know they're being watched. This method lets researchers enter organizational settings and observe behaviors, interactions, and processes without the people being aware that they are being studied, which helps avoid the biases that can occur when people try to present themselves in a certain way (Eisenhardt, 1989). By secretly watching people, groups, or activities within organizations, researchers can discover real behaviors and social interactions, which helps deepen our understanding of how people act and how society functions.

### **Limitation of the disguised observation**

Disguised observation presents scientific and ethical issues because researchers conceal their identity or aim. Informed consent is ethically circumvented, and subjects' privacy is violated as they are unaware that they are being examined. This is especially problematic in private or sensitive contexts, such as prisons (Dingwall, 1980). From a methodological standpoint, even with the best of intentions, covert observation runs the risk of changing group dynamics. Through interactions with participants, researchers may inadvertently shape behaviors or acquire personal prejudices (Festinger et al., 1955). Additionally, researchers have limited control over observed events, typically waiting passively, which can lead to inefficiency (Rosenhan, 1973). Finally, researchers run the risk of being mistrusted or harmed if they are found out, especially in high-risk situations (Hilbert, 1980).

### **Conclusions**

Disguised observation offers researchers a unique viewpoint to study human behavior and organizational dynamics in their most authentic forms. By minimizing reactivity, it provides unaltered insights into social interactions, making it a valuable tool across various research disciplines. However, the ethical implications, particularly around informed consent and privacy, cannot be overlooked. Researchers must carefully weigh the benefits of obtaining unfiltered data against the ethical duties they owe to participants. Despite these

challenges, disguised observation has proven indispensable in revealing hidden dynamics, particularly in complex organizational and social environments, offering rich data that overt methods may fail to capture.

Using disguised observation in research has several advantages. It allows researchers to gather real, unaltered data, makes the findings more applicable to real-world settings, and helps reveal underlying dynamics that might not be visible with other research methods (Eisenhardt, 1989). However, disguised observation also presents challenges, such as ethical concerns regarding deception and invasion of privacy, as well as practical difficulties in maintaining researcher anonymity and ensuring data reliability (Bryman, 2016). Despite these challenges, the insights gained from disguised observation can significantly enrich our understanding of organizational phenomena and inform evidence-based management practices.

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