

Conducting an Unplanned Participant Observation: The Case of a Non-Birder in Bird Watchers' Land

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Key words: bird watching; birders; participant observation; accidental observation; serendipity in qualitative research; subculture

Abstract: This article describes two participant observations of birdwatchers, which occurred by serendipity. Characteristics of personal and interpersonal behavior patterns are identified and illustrated. Specifically, four themes including total immersion and dedication to details of birders as well the collaborative-competitive nature of their interactions and sub-culture are discussed in the context of available knowledge about subcultures in other types of sports and leisure activities. Methodological and ethical aspects of unplanned participant observation are also addressed.

Table of Contents

- [1. Introduction](#)
- [2. Participant Observation](#)
- [3. The Observations](#)
 - [3.1 The Pico Bonito observation](#)
 - [3.2 The Antarctica observation](#)
- [4. Understanding Birders in Action](#)
 - [4.1 Total immersion](#)
 - [4.2 Detail oriented](#)
 - [4.3 Collaboration and competition](#)
 - [4.4 A unique subculture](#)
- [5. Reflections and Discussion](#)

[References](#)

[Author](#)

[Citation](#)

1. Introduction

Participant observation is typically a planned research activity, in which the observer is part of the observed. However, sometimes, life creates unanticipated opportunities for participant observation. Such was the case in two recent nature adventures that offered me the opportunity to watch birders in action proving true my son's statement following a tour in Borneo, where I spontaneously came up with an idea for a study (BERGER, 2011), that "no matter where you are and what you do, you always come up with a research project." I am not a birder. I love seeing birds' colorful appearance, I like listening to their singing but I do not care what they are called or what type or family they belong to. Yet, on two occasions I found myself recently traveling in the company of birders. One trip was to the Falkland Islands, or the Malvinas, depending if you ask a Brit or an Argentinian, South Georgia Islands and the Antarctic Peninsula. The second was to the Pico Bonito national park in western Honduras. When I decided to join these trips, I was not aware that among the 90 or so passengers on the

icebreaker cruise to Antarctica there were two organized groups of birders; neither did the itinerary that I received from the organizer of the Honduras trip reveal the heavy emphasis on birding. Thus, I became a participant observer of the world of birding by serendipity. While none of these trips were planned as a research trip, whilst my co-travelers were observing birds, I was documenting my observations, of which they were made aware. To protect the anonymity of those on whose behaviors it is based, no identifying information is provided, nor are individual stories cited. [1]

Birding refers to the "seeking out, identifying as many different species of birds as possible given various temporal and spatial limitations" (DONNELLY, 1994, p.218). Demographically, birders tend to be Caucasians, educated, middle class and middle age or older (CORDELL, HERBERT & PANDOLFI, 1999; LEE, 2002; ROBINSON, 2005; SALI, KUEHN & ZHANG, 2008). However, a tendency for a growing diversity has been reported in terms of age, sex and devotion to the activity in time and income (CORDELL et al., 1999; EUBANKS, STOLL & DITTON, 2004; SCOTT & THIGPEN, 2003). These developments have been attributed to greater awareness of the environment and of healthier lifestyles and the appeal of a pastime activity that can be enjoyable, social and informative. [2]

Psychosocial aspects of birding have been studied to some degree. Researchers have examined demographics and motivations of bird watchers (COLE & SCOTT, 1999; GLOWINSKI & MOORE, 2014; HVENEGAARD, 2002). For example, CLEMENS (2012) and ROSEN (2008) applied psychoanalytic thinking to understanding the motivation of birders. Clements suggested that birding is a socially acceptable activity that represents individual defense mechanisms whereas ROSEN emphasized the consistent experience of loss and the anal nature of the activity. SHEARD (1999, p.181) described birding as "symbolic hunting." KIM, SCOTT and CROMPTON (1997) used birdwatching in their study of the relationships among psychological and behavioral involvement, commitment to and intention for leisure activities. Some studies (LEI et al., 2010; SHEN, MACK & PALMERI, 2014) examined cognitive aspects of perceptions and judgment of situations using as examples the tasks involved in birdwatching such as the ability to rapidly and accurately recognize, categorize, and identify objects, as well as deductive reasoning. Finally, LEE (2002) and LEE and SCOTT (2004) used a longitudinal design to study developmental aspects of birdwatching as a process of developing a career of recreation specialization, i.e., acquiring the necessary skills and knowledge and changes in behaviors and commitment as well as enduring rewards, self-determination and leadership roles. [3]

Relational aspects of birding were also studied. GOODFELLOW (2015) studied birding couples and found that couples mostly differ in levels of interest and expertise but because they were interdependent, they tended to reconcile their differences through negotiation. Main aspects of the subculture of birders, its customs, conventions, politics and interpersonal dynamics included maintaining members' allegiance and affiliation, group cohesion, pecking order and competition (ROSEN, 2008). For example, DONNELLY (1994) analyzed how rigorous record keeping and increased policing have created an environment of

suspicion and a climate of distrust in the world of birding. Yet, given that birds can easily disappear, not all sighting can be supported by evidence such as a photograph or a third party verification (e.g., sighting by a group of birders) requiring a degree of trust in the reports. Thus, specific criteria regarding the likelihood of the accuracy of reported accomplishments have been developed including the history, behavior and manner of the reporter. Recently, a heated dialogue incurred on birders' blogs and on-line forums regarding racial relationships in the context of the birding world, with some claiming that the world of birdwatching is racist and excludes the participation of individuals of minority groups (e.g., GOSKA, 2014). [4]

In recent years, a focus have emerged on economic aspects of birding as a "niche tourism," including efforts to understand the motivation of birders to travel to specific destinations, the type of services that they require, how they may affect the industry of leisure tourism and potential negative effects on sustainability of venerable species (COLLINS-KREINER, MALKINSON, LABINGE & SHTAINVARZA, 2013; STEVEN, MORRISON & CASTLEY, 2015). The increase in numbers and diversification of destinations as birding became the fastest growing outdoor recreation activity especially in the north-western cultures generated discussion of economic benefits for local communities and service development for birders such as specialized travel agencies, bird tour companies, guidebooks and festivals catering to birdwatchers (CONNELL, 2009; MEHMETOGLU, 2007). Specific attention has been given to the effects of this specialized tourism on the environment including disruption of migration, breeding and feeding patterns and potential habituation on one hand and enhancing sustainability of communities on the other hand (LINDSAY, CRAIG & LOW, 2008; SAMEER, RAO & KHURSHEED 2011; SHELTON & LUBCKE, 2005). [5]

Research on birdwatching has traditionally employed quantitative measurement and analysis of aspects related to birdwatching and birdwatcher. However, no study was identified that attempted to capture subjective experiences involved in birding. This task can be accomplished by various measures such as observing birders in action and interviewing them. This article documents what I learned from spending time with birders, participating in their activities and listening to their stories in the natural environment of birding trips. It comprises four parts. First, the method of participant observation is discussed, followed by a brief description of the two observations. Next, the themes that emerged from the analysis of the observations are presented and illustrated. Finally, a discussion of the implications of the observations to understanding the subculture of birders and of issues related to spontaneous observations are presented. [6]

2. Participant Observation

Participant observation is a qualitative research methodology, which seeks to investigate the perspectives of a group in a given community. It originally derived from cultural anthropology and is extensively used in sociology, ethnographic studies and other social science research to study people, processes, and cultures (BERG & LUNE, 2011). What is distinctive about participant observation is that rather than maintaining a distant objective role, the observer actively participates in the daily life of the ones being researched while generating data from both an insider's and an outsider's perspective. The observation is done within participants' own natural environment providing the observer with an opportunity to gain a holistic understanding about the phenomena and its sociocultural context. The stance of the observer may be as a full member, partially emerged in the group activity or a complete observer of the group under observation (KAWULICH, 2005) such that the roles of the observer may range in degree of participation from passive when activities are observed in the setting but without participation in them to moderate participation (activities are observed in the setting with some level of participation in them) to complete participation (SPRADLEY, 1980). The observation may be *descriptive*, i.e., the observer documents anything and everything or *focused*, i.e., documenting selective aspects (ANGROSINO & MAYS DePEREZ, 2000). [7]

Main advantages of participant observation for collecting data are the ability to access "backstage culture" in an unobtrusive manner allowing for rich detailed description (De MUNCK, 1998, p.43). However, the method is vulnerable to researcher bias due to gender, age and social positioning, which may affect the access to information and its interpretation (DeWALT & DeWALT, 1998). Participant observation strategies have been applied in the study of health care, residential care and education, specifically relative to hard to reach and indigenous populations (MENG & YINGCHUN, 2014; POLSKY, 1977). This article reports a descriptive observation in which I was partially immersed. [8]

The concepts of what it means to be an insider participant observer have evolved over time and its benefits as well as challenges have been examined (LABAREE, 2002). Utilizing an insider perspective allows creating rapport, gaining access to meanings and unique understanding and interpreting culture-based cues that are not achievable by an outsider. At the same time, it creates methodological and ethical challenges related to positionality [9]

3. The Observations

The first observation occurred during a five day trip to the Pico Bonito national park in western Honduras. The second observation was during a three week trip to the Falkland Islands, South Georgia Islands and the Antarctic Peninsula on board of a Russian icebreaker. [10]

3.1 The Pico Bonito observation

I landed in Honduras' Toncontín International airport to join three American participants and a guide, who was the only one with whom I communicated prior to arrival. I had no clue who the others were. The small group was comprised a couple and a woman on her own, who was to be my roommate. We all appeared to be in our sixties, dressed very casually with simple hiking clothes and it was very clear that fashion is not a priority for this group. However, the equipment told the story of our difference before we even said a word beyond the introductory pleasantries. I carried a small carry-on with several khakis, t-shirts and basic necessities; each of the other three travelers carried two heavy cameras with huge lenses as well as a large bag packed with books, which soon were revealed as birding guides, and a large number of lenses, lens cuff and diverse photography gadgets, many of which I did not recognize, nor knew for what purposes they are used. We soon set on our way to the lodge in the middle of the lush forest in the Honduran highlands that was to become our home for the following five days and theoretically the base for planned day tours to nearby destinations including a beach, mangroves, coral cays and wild life refuge, all of which were what motivated me to book this tour. [11]

During the long drive on bumpy roads, I quickly developed the sense that like Alice in Wonderland who entered an alternative reality, I fell through the rabbit hole and unexpectedly found myself in the land of birders. The conversation focused on comparing pictures, discussing previous birding experiences, competing over stories of sighting of rare birds and arguments over the politics of birding clubs. I had nothing to contribute to any of these, thus, I quickly assessed my options. I could become bored and angry about these unforeseeable circumstances, I could withdraw into myself and ignore what was going on around me or I could become the participant observer. I opted for the latter and thus spent the next five days observing. I shared my situation and decision with my co-travelers who graciously agreed for me to document my observations and to educate me about their world and answer my questions. I set myself to learn about birders and birding. [12]

During the following days I became a "human shadow." Other than a day trip to the northern beach with the guide all to myself, which the other three preferred to skip (though it was part of the planned itinerary) for a chance to catch a sight of a bird that they missed seeing the previous day, I hiked with the others, shared meals with them, listened to their birding stories (as I had none of my own) and observed their interactions. I meticulously documented my observations of the

behaviors, interactions and communication that occurred. Upon returning home, I content analyzed my field notes to extract the themes. [13]

3.2 The Antarctica observation

An international crowd of about 90 people from young adults to individuals and couples in their seventies, of all walks of life, boarded the boat in Ushuaia in South Argentina on the way to the bottom of the globe. Eating arrangements were flexible and social spaces a few. Other than an occasional sighting of a whale, dolphins and diverse southern birds, the first two days at sea offered little opportunities for activities other than interacting with fellow travelers and getting to know each other. It soon became clear that among the few passengers who came in organized groups and the many who came as couples and individuals, two groups of birders and some single birders were there first and foremost for spotting, photographing and discussing the avian world of the south. Based on my previous experience observing birders, my curiosity was ignited and I soon became drawn to repeat my observation. [14]

I often made it my business to dine with members of the birding groups or stand on the deck bundled up in the middle of the sunlight of the southern polar circle night when the sun remains completely above the horizon and there is 24-hour sunlight. They appear to be absorbed in constantly scouting the skies for the large-winged albatrosses, the noisy skuas and the aggressive petrels. Efforts to engage them in non-bird-related conversations such as politics, books, theater and past trips often yielded mono syllabi or single sentence response whereas a question about birding could lead to a long informative monologue delivered in an enthusiastic tone. I observed and documented how they shared with each other discoveries of birds and the arguments regarding its particular nature. On several occasions, many of the passengers were crowding on one side of the ship to admire the sight of a giant whale jumping out of the water, dolphin playing around the ship and majestic parts of an ice shelf breaking with a loud noise and sinking into the ocean making high waves whereas avid birders were on the other side tracking the flight of a group of storm petrels. As in the Honduran trip, I documented my observation to later analyze the content for patterns and themes. The themes that emerged from these two observations are discussed in the next section. [15]

4. Understanding Birders in Action

Four themes appear to characterize personal and interpersonal behaviors of birders. On the personal level, they are totally *immersed* in and dedicated to birding, which colors their personal life and dominates their interpersonal interactions and they are *detail oriented*. Interpersonally, their relationships reflect a mix of *collaboration and competition* and a unique *subculture* with specific norms and language. These themes are elaborated and illustrated below. [16]

4.1 Total immersion

Birders appear to be totally absorbed in birds to the degree of manifesting at times a one track mind and selective vision. For example, the group would arrive at an amazingly beautiful iceberg or valley where birders would take a quick look at the magnificent view, acknowledge the beauty of the scenery and immediately focus for a couple of hours on canvassing the sky tirelessly for that evasive chested eagle. Similarly, the trail would bring the group to a scenic forest of cacti rich with colors and everybody's focus was on that tiny bird sitting on a branch. They are not to blame. This is what they came here for. Schedules are organized around birds and waiting patiently for long stretches of time for a desired bird to appear is not unusual. In the trip to Antarctica, birders were out at all hours of the long bright days and the short nights. As soon as somebody announces the name of a bird, begins the machine-gun-like collective clicking of cameras the size (and weight) of a canon with multiple lenses, which look like one could see Mars through them. The callings of the birds are overshadowed by exclamations like "I got him," "everybody please do not move." One devoted photographer announces at the end of the three weeks trip that she took 15,000 pictures. The reaction to the sighting of a rare bird has been described in the literature as causing adrenalin rush and often generates an instant rapid reaction travel of organized chartered flights to the location where a rare bird was reported (CONNELL, 2009). [17]

When they do not actually seek or watch them, birders discuss birds, participate in conferences on birding-related topics (a recent meeting of the Society of Ethnobiology focused on birds as cultural and linguistic symbols), compare notes about them, share experiences from previous birding trips, develop wish lists for future trips and show and watch the numerous pictures of birds they took in their trips all over the world. All conversations heard at all times are about birds. During meals, in the car, over a drink, I witnessed no discussion of politics, unless it referred to birding clubs and societies, books that were not about birding, the arts or any other topic unrelated to the avian world. Endless heated dinner table discussions were devoted to the question if a certain individual bird seen was a western juvenile male tanager or a summer tanager melting into its full male plumage (the examples and specific concepts used are courtesy of birders because I can hardly differentiate an eagle from a vulture). When discussion is not about birds, stories about icons of the birding world are abundant, such as the legendary ninety year old lady who continues to bird with the wish to complete her 4000 plus list before she dies. Birders do not give up easily. I observed a birder

going back numerous times to a location where a luckier birder reported having seen a crested eagle, with the hope (which did not materialize) to see the bird. [18]

4.2 Detail oriented

Birders are detail oriented. "Was the white dot on the right or on the left?" "Was the bird's color dark red and hence it belongs to a certain type or orange red affiliating is with a different type?" This slows their pace to a "museum walk" with numerous stops, which can become a challenge to non-birders. Whenever I stopped to take my notes and the group of birders moved on, I knew that I should not be concerned. I will find them staring at the next tree. Birders keep lists of sightings in certain regions, during a certain time period and during their lifetime. One does not have to be obsessive to be a birder but it helps. There is the daily ritual of reading lists of the sights of the day, running life lists that refer to the first time to see a bird in one's birding history, a global list and all kinds of additional lists. [19]

4.3 Collaboration and competition

Birders' relationships are positioned at the intersection of collaboration and competition, which may become quite aggressive. MOORE, SCOTT and MOORE (2008) found that competition is more likely to exist among twitchers, i.e., committed bird-watchers who travel long distances to see a new species just to add a species to their "life list," "year list" or other lists. Sometimes competition is masked as collaboration and supposedly friendly sharing of information whereas in other occasions it is open and tense. Arguments over who saw which bird first and which bird is the flying fowl are abundant. DONNELLY (1994) claimed that in some sport activities such as birding "the element of trust is occasionally acknowledged in the acceptance of claimed achievements" (p.216), such as one's statement regarding observing a certain bird at a given time and location. Heated discussions regarding accurate identification are rampant. Aggressively challenged reports of sighting of rare birds, threats to terminate membership in birding clubs, severing relationships and frustrations sometimes accompany the fierce competition. No birder I met was shy in showing off where they were and what they saw, especially so when it came to rare birds. A major arena of competition is the list focusing on the number of birds on one's list, the accuracy with which one is able to identify a given bird (a task challenged by the tendency of the birds to fly away). One person told me that she was attacked as faking postings of birds she claimed to have seen and that participants in birding trips complained that she locates too many more birds than others. An additional major source of conflict is related to accusations of failure to adhere to the code of ethics of the American Birding Association, which has quite elaborate and strict rules regarding appropriate birding behaviors and recording (see <http://www.aba.org/about/ethics> [Accessed: November 26, 2016]). Competition is manifested in birding blogs where individuals report their commitments such as a quest for 5000 birds in the ultimate BIG YEAR. The introduction of advanced media technology added a new level of stress to the competition. For example, a

heated debate exists regarding the use of applications playing birdsong as a means to encourage birds to come out of hiding. [20]

4.4 A unique subculture

Birders have their own language, norms and characteristic patterns of behavior sufficient to distinguish it from others and justify viewing them as a subculture. My English proficiency is quite good. I lecture in English, I present in conferences in English and I write books and articles in English. Yet sitting with a group of birders speaking avian lingo in a code that is mysterious to the rest of us, they might as well have spoken Chinese. CONNELL (2009, p.205) provided examples of twitchers' terminology including "suppression" to describe withholding news of rare species from others, "dipping" to describe an unsuccessful trip to see a new species and "jizz" for the combined characteristics of a bird that make recognition possible. In 2010, David LINO, a wildlife and birding expert, posted a piece entitled "[How to Understand Birders' Language](#)," which pretty accurately captures the experience:

"You're sitting in a hide and overhear other birders talking. The conversation ranges from 'LRPs' and 'roosting Leos' and you scratch your chin as you try to decipher their code—welcome to the world of birding jargon. Birders love to abbreviate or give nicknames to species, family groups and even individual birds, such as George the glaucous gull that used to overwinter in Norfolk. Add to that the panoply of slang used in identification, plus the strange parlance for certain birding activities, and things can get pretty confusing" (n.p.). [21]

5. Reflections and Discussion

The aforementioned analysis suggests that birdwatching is a unique subculture with its own norms, language, attitudes, behaviors and social affiliation. That I had the opportunity to "shadow" birders in two different locations with similar evidence lends credibility to the importance of observing this particular subculture. DOOLEY (2006) captured the essence of birders as "strange men [or women] with binoculars of the genus Bird-nerd" (p.41). Research has documented the characteristics and dynamics of diverse subcultures in the context of youth delinquency (BRICK, TAYLOR & ESBENSEN, 2009; POLSKY, 1977), education (VENULEO, MOSSI & SALVATORE, 2016), sexual orientation (SIMULA, 2015), sport (COULTER, MALLETT & SINGER, 2016), professional and occupational groups (ROSE & UNNITHAN, 2015) and music (MUHAMMAD, 2015). Universal to the various subcultures is the development of unique attitudes, friendships and behaviors. In birding, these include the development of knowledge and skills. Abilities for careful observation, quick perception and interpretation of information are key. Because of their ability to accurately and rapidly recognize, categorize, and identify objects and events, birders are often sought out as participants in studies of cognitive neuroscience and perception. Persistence and endurance, waiting and containing disappointments when the desired bird fails to show up are critical. Birding (or spending time in their company) teaches one to embrace surprises, make the most of brief encounters

and enjoy the unexpected because there is hardly anything less expected than birds. It can teach to appreciate diversity with more than 10,000 bird species in the world, many of them coexisting in the same habitats. These abilities may in some context determine a pecking order. "In the context of the tribe [of birders] finding a rarity is instant proof of ability. It's a rite of passage into true hunter status. To repeat it over and over again is to be elevated even further" (CONNELL, 2009, p.205). [22]

The pecking order is a major feature of the collaborative-competitive nature of the birders subculture and even more so of the twitchers who are primarily focused on adding to the list of rare birds, which they have seen and are looked unfavorably by other birders who are focused on making careful notes about any bird they see. Competition for seeing most species within a given geographical area or time frame has been described as fierce with intense rivalry. "Competition between twitchers is common, and may involve specific periods and actual competitions between individuals and teams, but alongside rivalry, trust and also distrust" (p.206). The competitive nature of the activity has been manifested in twitchathons or birdathons in which groups compete to see the most species in a day (DONNELLY, 1994) and individuals seek to win their "personal bests," and in the establishment of official birding competitions, of which one of the most famous is the New Jersey Audubon's World Series of Birding. The competitive-collaborative nature of the birders' subculture is manifested in the dynamics of sharing and suppressing information about rare sighting. While suppressing information is considered unethical and many use diverse means of communication to spread the news of a new or rare sighting, there have been documented instances of delays in making the sighting public, which were justified as efforts to protect a fragile environment from massive "invasion" of watchers as well as to stay ahead of competitors for sighting lists. [23]

While the observations described in this article offer interesting insight into the world of birdwatchers, they also raise issues related to their spontaneous nature, which has pros and cons. Adopting flexibility to use unplanned opportunities may open the door for generating a new understanding, which cannot be available if one remains exclusively with a systematic traditional approach to generating knowledge (ATKINSON, 2012). Thus, RYAN, LOPEZ RODRIGUEZ and TREVENA (2016) showed practical, methodological and ethical aspects of undertaking unplanned, ad hoc and fairly opportunistic repeat interviews with immigrants from Poland in London. Similarly, FUJII (2015) coined the concept "accidental ethnography" to describe paying systematic attention to unplanned moments such as standing in line, drinking coffee, buying food, or talking to hotel staff that occur outside structured procedure-driven methods like interviews and surveys and posited that it can help turn non-data into data to offer gaining better understanding of a social phenomenon. The process for doing so includes noticing stories and encounters that catch one's attention, writing down observations of others' behavior and own thoughts and feelings as they occur and finally reflecting upon these observations to link them to larger themes. [24]

However, unplanned participant observations may not lend themselves to traditional procedures for securing the ethics of the study. Typically, the protocol of institutional review boards (IRB) requires informed consent by participants prior to the study. While informal unplanned observations successfully meet other basic ethical standards including causing no harm and protecting confidentiality, by their nature, such observations do not meet the requirement of informed consent and voluntary participation prior to conducting the observation. Such issues in conducting non-traditional research are not unique to the type of observation discussed here. Various developments in social research stimulated the discussion of ethical dilemmas in conducting non-traditional research. The most obvious such development is web-based social research, which cannot ensure some ethical standards such as privacy, debriefing if necessary, the possibility to decline addressing some questions or retrospectively withdraw from the study and securing that consent is fully informed; at this point in time no strategy has been identified as a "best practice" to address such concerns (EMERY, 2014). Accidental observations such as those described in this article are vulnerable to similar challenges. For example, by their very "accidental" nature, prior approval of such observation by an IRB may not be feasible. [25]

However, nontraditional methods of participant observation have been justified ethically. For example, FARRINGTON and ROBINSON (1999) justified the use of covert participant observation to study homelessness as this was deemed to be the only feasible ecologically valid methodology whereas any disclosure or negotiation would have precluded the conduct of the study. They posited that the method was ethical as the character of interactions and the social relationships were unaltered by the observation, questions were limited to those that would occur naturally and participants remained anonymous. [26]

Notably, the current system of IRBs has been debated and challenged (CARPENTER, 2007; GRADY, 2015; VON UNGER, DILGER & SCHÖNHUTH, 2016), specifically the adequacy of current procedures relative to the developing internet-based research and other non-traditional approaches to research. Some of the critique suggests comprehensive revisions in the structure, procedures and standards of IRBs in the social sciences towards a more liberalized approach (e.g., CARPENTER, 2007), claiming that such changes will contribute to enriching knowledge without harming participants. Such changes are anticipated to support more scholars to be flexible and open as opportunities for developing knowledge in general and about human behavior and relationships in particular present themselves serendipitously as it happened in the two case examples presented in this article. [27]

In spite of the aforementioned challenges, these two accidental observations that yielded rich evidence about a little researched subculture illustrate the importance of informal, unplanned observations in understanding of subcultures. A take away from these experiences is that such observations can play an important role in different types of qualitative studies beyond ethnography, where it has been the hallmark. These include feminist inquiry, phenomenology, critical race research and participatory action research. The incorporation of spontaneous observations

in such and additional types of qualitative studies can expand the menu of strategies available to researchers who seek to understand subcultures and thus, help enrich our knowledge about them. [28]

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