



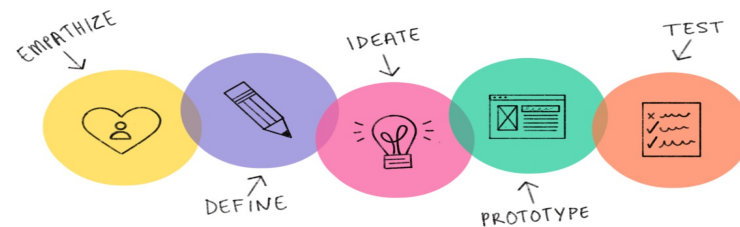
**Blended Intensive Program (BIP)**

**“Service Design, Digital Transformation and Business Model Innovation”**

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**International Hellenic University Serres Campus, Serres, Greece**

# Research Methods in Service Design



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# Introduction

“Design is about imagining what doesn’t exist”

However, it should be realistic (why?) and always based on data and requires the validation of what we think and design.

This is usually achieved by the following:

- Before the design: Data collection and analysis
- After design & before implementation: Prototyping

# Research methods in service design

- **Preparatory Research**
  - Contextual analysis
  - Desk/ Secondary Research
- **Quantitative Research Methods: The “traditional” research approach**
  - Questionnaires/ Surveys
- **Qualitative Research Methods: Appropriate for research in social sciences**
  - Observation: Direct observation, Shadowing
  - Ethnographic Research: Service Safari, Online Ethnography & Netnography, Mobile Ethnography
  - Diary Studies
  - Interviews: Personal surveys, Focus Groups
- **Participatory Research Methods: Appropriate for research in service design**

# Preparatory Research

# Preparatory Research

**What it is:** Basic information gathering on the topic of interest.

**Objective:** To learn more about the issues, the design context, the organization, or comparable experiences.

- It has a general (preparatory) character; it may include very broad research questions or topics, such as:
- “What is this service about?”
- “Who else provides this service?”
- “How service is used? Who are the users?”

**Why it is important – What it achieves**

- Defines the boundaries of the system: The system can be complex. The framework helps to keep the research focused.
- Provides clear direction: You know what you are looking for, why you are looking for it, and how you will use the findings. Without a clear goal, the research becomes chaotic.
- Protects against wasting time and resources.
- Ensures a common understanding between all involved. Management, users (employees/customers), technical teams, etc.
- Allows for the selection of appropriate research methods. The goal determines the methodology.

**Sources used:**

- Internet research
- Social media exploration
- Scientific or industry-specific publications, as well as newspapers or magazines

**Brief Report:** Includes conclusions as well as assumptions or hypotheses for subsequent research.

- Contains references to interesting and useful primary material (summary of text excerpts, collection of photos, screenshots, videos, etc.).
- It often takes the form of a mind map.

# Preparatory Research

Preparatory research is often visualized as a **Funnel** (also as a **Zooming Out** process), where you look at the service context before diving deep into specific service setting



# Context Analysis

**What is it:** Context analysis is used to understand the “context” (i.e. the “surroundings”, the environment) in which a service exists or will be introduced.

**Purpose:** To map the broader context (social, organizational, technological, cultural, and regulatory factors), so designers can make informed decisions before moving into deeper research or ideation.

**Primary goals:** Basic understanding, Orientation and Risk Mitigation.

- Identify Constraints (technical, legal, financial, etc.).
- Define the stakeholders.
- Establish a Baseline: Understand the "current state" before proposing a "future state."

**Other terms used:**

- Contextual Mapping:
- Landscape Analysis
- Discovery Phase/ Research
- Knowledge Harvesting

# Desk/ Secondary Research

**What is it:** Research based only on existing secondary data, information collected for other projects or purposes.

- Secondary data
  - Can be qualitative or quantitative, including studies, trend analyses, customer data, academic research data, etc.
  - Can come from external sources (research published in academic papers) or from internal sources (research data has been made available to your organization).

**Purpose:** To check if there is already research on a topic or research question and to formulate a research question more precisely.

- Avoid “reinventing the wheel”.

**Sources used:** Various

- Research in scientific databases and journals, libraries, conferences, statistical databases, etc.
- Reading scientific or specialist publications for the industry, as well as newspapers or general interest magazines.

# Preparatory Research – Exercise

Let's assume you are asked to design a Blended Intensive Program for your University.

What would you search for in your preparatory research?

# **Quantitative Research Methods**

# Survey

**What it is:** the systematic collection of new data/information from real people (users, customers, employees), usually with the use of questionnaires, in order to understand the issues affecting the provision of the service (how they experience/evaluate it, where gaps/opportunities are identified, etc.).

Surveys are a widely used quantitative research method in service design that help teams gather structured feedback from users to inform design decisions.

- Examples: Multiple-choice questions, Likert scale, or open-ended

**When to be used:** They're especially useful for validating assumptions, identifying pain points, and measuring satisfaction across a broad audience.

- Post-service evaluation & feedback: Understand what worked well and what could be improved after service delivery.
- Customer satisfaction surveys: Measure how users feel about service experiences.
- Needs assessment: Identify unmet needs or expectations.

## Limitations

- May lack depth and responses can be superficial.
- May lack context (compared to qualitative methods).
- Not ideal for exploring complex situations, behaviors or emotions.
- Poorly designed surveys can lead to misleading conclusions.

## Survey example

- Use the following link to answer a questionnaire about this BIP

# Qualitative Research Methods

# Observation



# Observation

**What is it:** Observation refers to watching others (users, staff) as they engage with a service.

- Rather than relying solely on data or what people say in surveys, observation captures what they do (behavior).

**Purpose:** Understand how people interact with services

## Execution/ Types of Observation

- Direct Observation: Watching users in real time, either overtly (they know you're observing) or covertly (they don't).
- Fly-on-the-wall: Passive observation without interaction (aiming to reduce influence on behavior).
- Shadowing: Following a user or staff member through their journey to understand their experience step-by-step.

## When to use Observation:

- Uncover Behaviours/ Hidden Needs: People often can't articulate what frustrates or delights them.
- Understand Context: It shows how physical space, social dynamics, and environmental factors affect service.
- Validate Assumptions: Observing real behavior helps challenge or confirm what designers think they know.
- Reveal Workarounds: Users often use/ adapt services in creative ways.

## Challenges:

- Observer Bias: Researcher's expectations directs what they see.
- Ethical Concerns: Issues such as privacy and consent - especially in covert observation.
- Limited Scope: Reveals behaviours ('what'), but does not reveal thoughts, sentiments or motivations (why); it can be combined with interviews or surveys for depth.

# Observation: Case study - Improving Patient Discharge at a Hospital

## Problem:

- Frequent delays in discharging patients.
- Managers believed it was due to slow paperwork and coordination between departments. However, they weren't sure where the bottlenecks were happening.

## Method applied:

- Service designers conducted shadowing: they followed patients from the moment discharge was approved to the moment they left the hospital.

## Observations revealed:

- Unclear Roles: Nurses often waited for doctors to complete forms, while doctors assumed nurses would initiate discharge.
- Physical Layout Issues: Patients had to walk long distances to collect medications, causing confusion and fatigue.

# Observation: Case Study - Enhancing the In-Branch Experience at a Bank

**Problem:** A bank wanted to improve customer satisfaction in its physical branches. Surveys showed long wait times and low satisfaction by the customers, but the feedback lacked detail.

**Observation method:** Service designers conducted fly-on-the-wall and shadowing observations. They watched customers from entry to exit, noting interactions with staff, use of space, and emotional cues.

## **Observation revealed:**

- Unclear Navigation: Customers often didn't know where to go for specific services.
- Idle Time: People spent a lot of time waiting without knowing how long it would take or what was happening behind the scenes
- Missed Opportunities: While waiting, customers rarely engaged with digital kiosks or promotional materials.
- Staff Bottlenecks: One or two staff members were handling multiple roles, leading to delays and stress.

**Solution:** The bank redesigned its in-branch service experience:

- Introduced clear signage and service zones for different needs (e.g., loans, deposits, account help).
- Added a digital queue system with estimated wait times and SMS alerts.
- Repositioned interactive kiosks and trained staff to guide customers to use them.
- Created a greeter role to welcome and direct customers upon entry.

# Ethnography



# Ethnography

**What it is:** Researchers personally explore a specific experience in its real-life context, often as customers or employees.

- Document it themselves using notes, audio recordings, videos, and photographs.

**Purpose:** To gain a deeper understanding of the service experience; to **interpret behaviours**.

**When to Use:** Complex, ambiguous service contexts where user motivations and 'cultural' practices (habits) are poorly understood.

**Execution/ Types:**

- **Overt:** Researchers are visible to those around them.  
This may lead to the “observer effect,” where their presence influences the environment and participants’ behavior.
- **Covert:** Participants are unaware of the researchers’ presence and the research being conducted.  
It can arise ethical issues.

**Critical Success Factors:**

- First-level concepts (“raw data”) refer to what we objectively see and hear.
- Second-level concepts (“interpretations”) refer to how we feel or interpret what we experience.

# Ethnography – Case study

An **airport authority** wanted to redesign its security screening process to improve passenger experience.

**Problem identification:** Complaints about long wait times, confusing instructions, and stressful interactions were common.

- Instead of relying solely on surveys or operational data, the design team embedded themselves in the environment: Researchers acted as passengers during peak and off-peak hours. They observed staff behavior, signage clarity, and passenger reactions.

## Observations

- Researchers identified emotional “pain points”, i.e. moments of uncertainty, embarrassment, or frustration. Passengers were often confused by inconsistent signage and instructions. Families and elderly travelers experienced higher anxiety due to unclear expectations and lack of assistance.
- Security staff had developed informal routines to manage stress and crowd flow.

## Design Outcomes

- New signage system with clearer icons and multilingual support.
- Zoned waiting areas for different passenger types (families, frequent flyers, mobility-impaired).
- Staff training modules based on real-life scenarios observed during ethnography.
- Digital walkthrough videos to prepare passengers before arrival.

# Differences between Observation & Ethnography

Aspect	Observation	Ethnography
<b>Definition</b>	<u>Watching</u> and recording behaviors or interactions	<u>Immersive</u> study of people's experiences in their natural context
<b>Depth of Engagement</b>	<u>Surface-level; focuses on what is seen and heard</u>	<u>Deep engagement</u> ; includes emotional, cultural, and contextual understanding
<b>Role of Researcher</b>	Passive observer	Active participant or embedded researcher
<b>Duration</b>	Short-term (hours)	<u>Long-term (days to weeks or more)</u>
<b>Tools Used</b>	Notes, checklists, video/audio recordings	Notes, recordings, interviews, artifacts, diaries
<b>Interpretation Level</b>	<u>Descriptive (what happened)</u>	<u>Interpretive (why it happened, what it means)</u>
<b>Purpose</b>	<u>To identify</u> patterns or issues in service delivery	<u>To understand and interpret</u> lived experiences and cultural context

# Ethnography Variations

**Service Safari:** In Service Safari researchers immerse themselves in real-world service environments to experience them as ordinary users. It's a form of experiential research that helps uncover emotional, functional, and contextual aspects of a service.

- **Researchers "go on safari"** (e.g. visit banks, hospitals, retail stores, restaurants, or digital platforms) to take first-hand experience and gain direct insight into how a service works.

**Mystery shopping:** In mystery shopping researchers act as regular customers in order to evaluate the quality of a company's services, products, and customer experience.

- It is implemented without revealing the identity or purpose of the researchers.

## Key Attributes

- Anonymity: The staff is unaware they are being evaluated, ensuring authentic behavior.
- Standardized Evaluation: Shoppers follow a predefined checklist or scenario to ensure consistency across visits.

# Ethnography Variations

Differences between service Safari and mystery shopping

	Service Safari	Mystery Shopping
<b>Purpose</b>	Understand and empathize	Evaluate and measure
<b>Approach</b>	Open exploration	Structured checklist
<b>Perspective</b>	Researcher as curious customer	Trained evaluator acting as customer
<b>Outcome</b>	Insights, ideas, observations	Scores, compliance data
<b>Use cases</b>	Service design, innovation	Quality control, benchmarking
<b>Flexibility</b>	High	Low

# Alternatives of Ethnography: Online Ethnography/ Netnography

**Online ethnography** adapts ethnographic techniques to **online communities and social media**, analyzing digital traces, posts, comments, ratings, to understand service perceptions and social interactions.

**When to Use:** Services with significant online engagement (forums, social platforms, review sites), where sentiment and behavioral patterns matter.

## **Critical Success Factors:**

- Accurate community and data sources selection.
- Robust text-analysis tools.
- Triangulation with offline insights.

## **Example:**

- Hotels tracking TripAdvisor reviews to identify service gaps.

# Netnography: Case study

- One notable study titled “**Exploring coffee consumption practices through netnography**” examined how specialty coffee enthusiasts engage in online forums, blogs, and social media to shape and share their coffee experiences
- The researchers wanted to understand how younger consumers perceive coffee rituals and café experiences in urban settings. Traditional surveys failed to capture emotional and cultural elements.
- Researchers analyzed thousands of Instagram posts, TikTok videos, and Reddit threads related to: #coffeelovers, #thirdwavecoffee, etc.

The current issue and full text archive of this journal is available on Emerald Insight at:  
<https://www.emerald.com/insight/0007-070X.htm>

## Do connoisseur consumers care about sustainability? Exploring coffee consumption practices through netnography

Exploring  
coffee  
consumption  
practices

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### Abstract

**Purpose** – The coffee industry has experienced two major trends: the development of connoisseur consumption of specialty coffee and the importance of sustainability. Despite the increasing concomitant relevance of both trends, literature on how sustainability has been interlacing with connoisseur consumption is rather limited. Therefore, this paper aims to analyse how connoisseur consumers (CC) integrate sustainability into their coffee consumption practices.

**Design/methodology/approach** – The paper adopts a qualitative netnographic approach through an interpretive cultural analysis of specialty coffee bloggers narratives, conceived as a specific sub-group of CC that tend to be particularly active on social media.

**Findings** – Through the lens of social practice theories, the study reveals that CC are likely to implement and perceive sustainability very differently from the dominant mass market as subject to the influence of their shared rituals, values, norms and symbolic meanings. Such findings are relevant under a managerial perspective as they also generate insights on how to foster environmentally friendly practices in coffee consumers as well as on how to create more sustainable marketing strategies.

**Originality/value** – The study contributes to the literature on coffee consumption behaviour and sustainability. First, by analysing actual behaviours rather than intended, the study offers an alternative approach to the dominant paradigm of linear decisions models in the study of sustainable consumption. Second, because CC possess a unique consumption style, different from the mainstream market, the analysis has led towards the identification of alternative sustainable consumption patterns and enablers.

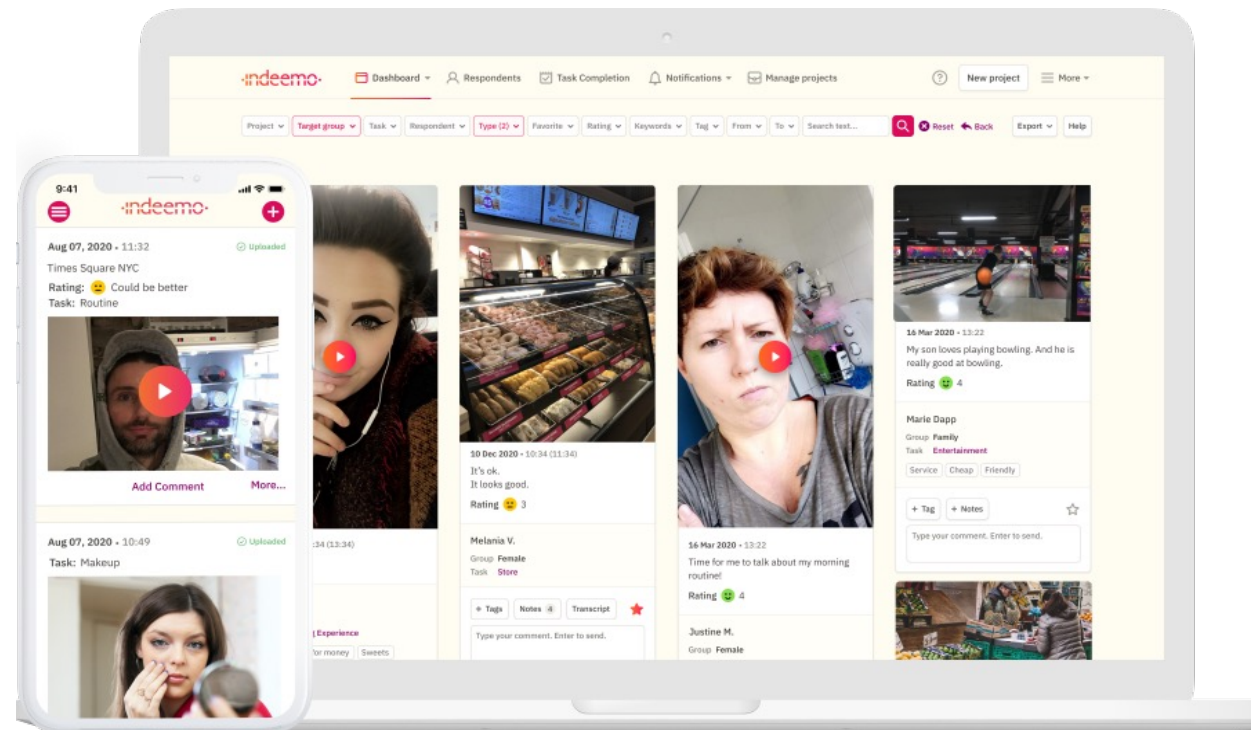
**Keywords** Connoisseur consumers, Coffee, Sustainability, Social practice theory

**Paper type** Research paper

# Mobile Ethnography

In mobile ethnography **participants use their smartphones to document real-time experiences**, behaviors, and emotions in their natural environments.

- As a method, it shifts the role of the researcher to the participant, enabling more authentic and user-centered insights.
- It provides real-time documentation (data is captured as events happen, reducing recall bias and enhancing authenticity).
- It is supported by tools (e.g. [indeemo.com](https://indeemo.com))



# Reflective Research Methods

These methods employ kits (diaries, cameras, postcards) for participants to self-document personal experiences, feelings, and contexts over time, yielding rich, subjective artifacts.

## Examples:

- A camera/ smartphone with instructions: “Take photos of things that frustrate you during shopping.”
- A map: “Mark the places you shopped/ visited and how you feel about each.”
- Postcards or stickers: “Write a message about your favourite shopping moment.”
- Creative prompts: “Draw your ideal checkout experience.”

**When to Use:** Exploratory phases requiring inspiration about users’ everyday lives, habits and sentiments.

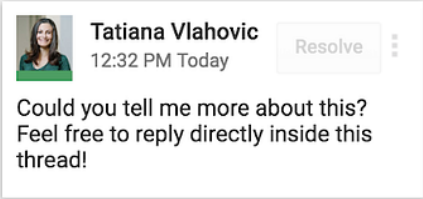
**Critical Success Factors:** Thoughtful, engaging probe design; clear instructions; regular check-ins; ethical considerations for sensitive content.

## Examples:

- A travel app design team sending travelers photo-diaries to capture moments of delight.
- A public service project asking citizens to map daily stressing moments/ places.
- A fitness app provider asking users to journal daily workout exercises, motivations and barriers.

# Diary studies

Situation 1. Please include any photos or screenshots with your answers if it helps to explain.	
Date of usage situation	December 18, 2018
What were you trying to accomplish, and why?	This is example text that a participant could write.
Where were you physically located when you were trying to accomplish that?	
What device did you use to accomplish that (e.g., desktop/laptop, tablet, mobile phone, other)?	
How did you accomplish that, and what tool did you use? Why did you do that this way?	
What (if anything) was helpful about the tool in this situation, and why?	
What (if anything) could have been improved about the tool in this situation, and why?	



The screenshot shows a user comment from Tatiana Vlahovic, posted at 12:32 PM Today. The comment text reads: "Could you tell me more about this? Feel free to reply directly inside this thread!". To the right of the name and time is a "Resolve" button and a three-dot menu icon.

# Interviews

Interviews are direct, one-on-one structured or semi-structured conversations between a researcher and a participant that allow researchers to ask open-ended questions and probe for detailed responses.

- They are used to uncover deep insights into users' needs, behaviors, motivations, and experiences.
- They are ideal for exploring complex or emotional aspects of service interactions.

## When to use interviews

- For empathy development (understand the customer).
- For contextual understanding (Learn how users interact with services in their real-life environments).
- For idea generation (Discover unmet needs or opportunities for innovation).
- For assumptions validation (Test assumptions or prototypes).

## Limitations

- Time-consuming to conduct and analyze; requires skilled interviewers.
- Smaller sample sizes may limit generalizability; risk of bias if questions are poorly framed

# Case Study: AT-ONE Project – Service Design in Airlines

Article PDF Available

Service Innovation Through Touch-points: Development of an Innovation Toolkit for the First Stages of New Service Development

August 2011 · [International Journal of Design](#) 5(2):15-28

Authors:



**Simon Clatworthy**

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In-depth individual interviews with airline passengers and staff were performed to understand their experiences, expectations, and frustrations.

## Objectives of the Interviews

- Explore passenger emotions and behaviors during different stages of all travel.
- Identify pain points and unmet needs across service touchpoints (e.g., check-in, boarding, in-flight).
- Gather staff perspectives on operational challenges and customer interactions.

## Methodology

- Participants: Airline passengers and frontline staff.
- Format: Semi-structured individual interviews conducted in person and via phone.
- Topics covered: Service expectations, memorable experiences, frustrations, and suggestions for improvement.
- Analysis: Responses were synthesized into empathy maps and journey maps to visualize user needs and emotions.

# **Participatory Research Methods**

# Co-creation Workshops



# Co-creation Workshops

Co-creation workshops are one of the most dynamic and participatory methods in service design research. They bring together diverse stakeholders—especially users—to collaboratively generate ideas, prototypes, and service blueprints in real time.

- They're not just about gathering feedback—they're about **making users co-designers** of the service.

**When to Use:** Ideation and prototyping phases to harness collective creativity and align cross-functional teams.

**How to Use:** Facilitate structured activities (personas, storyboarding, role-play).

## Examples:

- A telecom operator run a co-creation workshop with customers to design new self-service portal features.
- A municipal service team engaging citizens to design public transport services.

# Case Study: Co-Creation in Health Services Through Service Design

This case study examines how co-creation workshops were used to redesign health services by involving patients, healthcare professionals, and service designers.

## Workshop Structure

- Participants: Patients, nurses, doctors, administrators, and service designers.
- Format: A series of co-creation workshops using tools like journey mapping, personas, and prototyping.

## Activities:

- Mapping patient journeys to identify pain points
- Brainstorming service improvements collaboratively
- Rapid prototyping of new service touchpoints
- Reflective discussions to align stakeholder perspectives

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## Co-creation in Health Services Through Service Design

Chapter | First Online: 19 January 2022

pp 497–510 | [Cite this chapter](#)

# Focus groups



# Focus groups

Focus groups typically involve 6–10 participants from a target user segment who engage in guided (facilitated by a moderator) discussions about their experiences, perceptions, and expectations about a service.

- They're used to explore collective insights, emotional responses, and group dynamics as well as generate ideas in a collaborative setting.

## **Limitations**

- Groupthink may suppress individual opinions
- Dominant voices can skew discussion
- Requires skilled moderation and careful planning

# Case study: Mixed Focus Groups in Mental Health Service Design

This study investigates how mixed focus groups— involving both mental health service users and professionals—can be used to explore power dynamics and collaborative design in service delivery.

## Implications for Service Design

- Focus groups can facilitate co-creation by bringing diverse voices into the design process.
- They help uncover emotional and relational dimensions of service use that are often missed in surveys or structured interviews.
- Mixed-group formats are particularly valuable in complex services like healthcare, where collaboration and trust are essential.

SOCIETY, HEALTH & VULNERABILITY  
2018, VOL. 9, 1447193  
<https://doi.org/10.1080/20021518.2018.1447193>



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## Equality and differences: group interaction in mixed focus groups of users and professionals discussing power

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### ABSTRACT

Using focus groups, the group interaction provide an important source of data about the group process. The aim of this study is to explore how users and professionals in mixed focus groups interact when discussing power in user-professional relationships. By analysing three mixed focus group discussions where both mental health service users and professionals participate, the article contributes to the discussion on focus group interaction in mixed focus groups. The analysis is inspired by Stevens' twelve-question guide for group interaction. The results show how the participants related to the vignettes, how they related to each other, and contradictions and disagreements in the focus groups discussing the vignettes. Despite the participant's background as users and professionals, the vignettes engaged the group discussions and became a tool for equality within the groups. By discussing power in user-professional relationships in mixed focus groups, the vignettes were interpreted from perspectives as user, mental health workers and researchers. Mixed focus group interaction can make a valuable contribution to developing knowledge in the field of mental health service research.

### KEYWORDS

Focus groups; interaction; heterogeneous focus group; mental health; community mental health service; vignettes; power

# Exercise

## Exercise: Service Research at the International Office

The International Office of the University discovered recently that the number of applicants for Erasmus studies has deteriorated over the past few years.

The staff believes it occurred for a variety of reasons, including the anxiety of students to complete their studies and begin a postgraduate degree programme and the lack of information for the opportunities of the Erasmus programme.

The new director of International Office wants to investigate the issue and understand the reasons of this attitude of the students.

Which research methods would you suggest (and why)?

## Exercise: Service Improvement at the University

The University wants to excel not only in education and research, but also in the supplementary services it provides to its students, such as accommodation, food and transportation.

In order to improve service provision, the leaders of the University decided to implement an extensive research for understanding the needs of the students regarding these services and how satisfied/dissatisfied they are with the existing service provision.

Which research methods would you suggest (and why)?

# Thank you!



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