

publiczone

The User Research Handbook

Putting your audience at the heart of digital production

Contents

Introduction	1
Listen to your users	2
<i>Case study: Curly Wurly</i>	6
Watch your users	8
Involve your users	12
<i>Case study: 'Get Together' - Participle</i>	16
Carry out desk research	18
Use it yourself	22
Pause and take stock	26
<i>Case study: Return on investment</i>	30
Surprising things we've learned from our research over the years	32
Who we are	34
Notes	36
Thank You	38

Introduction

Technology has changed so many elements of our clients' businesses: from the provision of information, to ease of donation, to mobilising thousands at the click of a mouse. These changes have made a massive impact, but one valuable opportunity doesn't always get included in the list of 'big' digital breakthroughs: the ability to engage with your audience. We think this is amongst the most important. Thanks to digital you can now reach out to your audience and they can talk back to you in a way that is faster, cheaper and more responsive than ever before.

We believe that, if you put the user at the heart of your digital strategy, not as a customer, but as an influencer and product developer, you will create a better product. Of course, there is still an important place for expertise, but it's easier to make expert decisions when you've gained deep insights from engaging with real people.

People constantly surprise us and challenge our assumptions when we seek their involvement in our work. We can honestly say that user research has improved every single project we've worked on. This handbook offers some simple ideas about how you can engage your audiences, and examples of organisations that have reaped rewards in doing so.

Special thanks to Julie Dodd, our Head of User Experience, for putting this together. In the spirit of this handbook, get in touch and let us know what you think, and feel free to share these ideas among your networks.

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Listen to your users



Why do this?

They can't give you the solution but they can give you the criteria by which you need to judge the solution.

When he designed the world's first car, Henry Ford once said: *"If I had asked people what they wanted, they would have said 'faster horses'."* This is sometimes quoted by people who think that customers don't know what they want until professionals give it to them. But we think there's a different lesson to be learned from Ford.

"Faster horses": these two words convey a surprising amount of information and insight. What users were unknowingly giving Ford was a useful set of criteria for his product design. They implicitly meant:

"I want to get where I'm going faster"

"I want something that feels familiar"

"I need something I can rely on"

"I need something I can afford"

People may not be able to articulate exactly what a product should be (they didn't ask for a car) but they'll tell you what they need, what they like and dislike, and how they feel about your organisation or product. Talking to them before, during and after digital project development will help identify the product requirements and optimise performance. Every time your audience visits your site, Facebook page or app they're telling you something, and showing a willingness to engage. Why not listen? Reviewing these comments, conversations and analytics should be part of your everyday process. We see many very good organisations set up the tools to listen to users, but not follow up by reviewing what's being said regularly. If you've built a social media following or have polls on your website, use them to review your work.

How to

Listen to your users

Do 'depth interviews'

You don't need to talk to every single person who uses your services. We regularly talk to a sample group of people and it's incredibly valuable. You can gain masses of insight from a half hour chat with a potential audience member. To help it go smoothly, set up a time to talk so they're not in a rush; ask mostly open questions, not yes/no answers, and let people know that what they say will be confidential so they feel able to tell you the truth. It's vital that you leave plenty of room for people to think before they answer so don't jump in to fill silences.

Use simple online tools

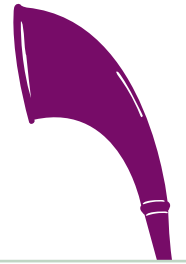
There's a new online research tool popping up every month; we've found a few that make it really simple to listen to what your audience has to say. Verify (verifyapp.com) allows you to compare page designs, see where users click and how a design makes them feel, all through simple two-minute tests.

Use social media channels to find the right people

People love being asked for their advice, and social networks have made finding users for research a doddle. If you've got followers on Twitter or Facebook, ask them what they think. Or try finding relevant Facebook or LinkedIn groups to join and ask the people there.

Put a feedback button and contact us page on your site

The Stanford University 'Web Credibility' project has shown that letting users contact you easily is one of the top five factors in making sites appear credible (bit.ly/stanford5factors). Ask users what they think directly through your site and make sure the contact link is obvious. You'll also need to make sure it's someone's responsibility to read the feedback log or it'll just sit and gather dust.



What we've learned:

We interviewed people with a range of disabilities at home and at work for the redesign of the BBC's My Web My Way site. The site provides how-to guides that help people with sensory, cognitive and motor disabilities use the web more easily. The interviews highlighted some common misconceptions about living with disabilities. Users with partial sight are heartily sick of being grouped with the fully blind, yet that's the way most sites treat them. The growing awareness of screenreaders is a good thing, but use of screen magnifiers and simple enlarging of text is a lot more common. As a result, we completely changed the signposting used on the site so that people with visual impairments would get how-to guides that were relevant to their needs. And blind users aren't just told to make their text bigger. (bbc.co.uk/accessibility/accessibility_beta)

If you do one thing:

Keep the conversation going

People's behaviour changes all the time, especially on the web, so your products and services can get out of date very quickly. To stay relevant, gather feedback from your users regularly. It doesn't need to take much time or effort – request feedback through Facebook, LinkedIn or Twitter, or set up a survey using a tool like Zoomerang (free for the first 100 respondents and better customisation options than Survey Monkey). One of our clients, Diabetes UK, started the design process for an iPhone app by asking their Facebook group what their favourite apps were – it resulted in one of the best briefs we've ever received, and cost them nothing. But they couldn't have done it if they hadn't spent time nurturing their Facebook pages through frequent, thoughtful updates.



Curly Wurly

Cadbury breaks from tradition

Cadbury failed to look at what curly wurly consumers wanted from their chocolate bar.

A few years back, Cadbury changed the recipe of the Curly Wurly. The new recipe meant that the chocolate on the bar didn't flake off as easily and didn't melt as quickly. A desirable improvement and sensible you'd think? Yet it went down badly. In fact it prompted a backlash so strong that Cadbury had to return to the original recipe having wasted months of R&D and packaging budget. Why? It rendered the Curly Wurly un-stretchable, thwarting a practice which people, young and old alike, had used for fun since the bar was launched in the 1970s. In fact the practice of Curly Wurly stretching is the subject of more than one Guinness World record!

Cadbury made a mistake in failing to look at what the Curly Wurly consumers wanted from their chocolate bar. If only they'd known that in 2011 there would be more than 50 Curly Wurly appreciation groups on Facebook waiting to give them some feedback! The failure to do user research turned what seemed like a practical business decision into an expensive and useless flop.



Watch your users



Why do this?

*They often say
one thing but do
another. Find
out what they
really mean.*

Ask any health professional and they'll tell you that there's a big difference between what people say they do and what they do ("I drink less than ten units a week, doctor"). So it pays to observe people using your product in their work or at home – wherever they might typically use it.

You don't have to spend thousands immersing yourself in people's daily lives. In fact, you can learn from watching as few as five people: your flatmate, mother, teenage cousin, whoever. Just make sure they're people outside your office team. They'll show you the pre-conceptions people have, the first thing on a page they notice, and perhaps more importantly the things they miss, like that strapline you assumed everyone would read before they started clicking! Every time we watch someone use the web we learn something new.

How to

Watch your users

Do a usability study

Sometimes projects need specialist user testing labs but there are much cheaper, more accessible ways to do usability tests today. With the help of brilliant and inexpensive tools like Silverback (silverbackapp.com), you can now do full usability tests in your office, in users' houses, or completely remotely through brilliant software like Loop11 (loop11.com).

Get in context

Try to observe people in the environment in which they would normally use your site. They're more comfortable and will behave more naturally. Most people are surprisingly open to visitors at home or work but if you can't do that then get them to sketch room layouts on a piece of paper. This helps put them in the right frame of mind, and shows you what influences or interruptions may affect their online use.

Analytics

Spending quality time with your site analytics is one of the most cost effective ways of learning what your users do and don't want. Google Analytics has a simple but powerful In-page Analytics function that shows at a glance where users are clicking on each page. Your site analytics are an amazing resource and not looking at them is like a retailer ignoring their sales figures.



What we've learned:

We ran usability research for Livity on our prototype for their new site, somerewhere.com, which connects young people who need a place to pursue their hobbies with people who have space to offer. Users filled in the online form with ease and reported that they felt positive about offering their resource. But when we watched the footage from the test, we found that our sample users were hesitating before they clicked the 'submit my space' button. When asked if they would get involved in the project in real life, they all said yes, but their body language suggested different. It turned out they liked the idea but they didn't feel reassured enough to commit at this stage. As a result, we're changing the experience, adding a more reassuring explanation and clearer next steps.

If you do one thing:

Spend five minutes with a stranger

Go to an internet café or library and ask some people to spend five minutes using your site or app. You may want to set them a specific task or just ask them to find something that interests them. They may not be your exact target market but they'll still show you a lot about what real users like, dislike or find difficult. Being in a busy public space also means you can get through a lot of people in just an hour or so without the need to spend time setting up a more formal test.

Involve your users



Why do this?

Bring your users into the heart of the design process and find out exactly what they need.

Involving your users in the design process can be really helpful, not only delivering useful insights but also unexpected benefits, for instance, turning potential detractors (most people dislike change at first, even for the better) into vocal advocates.

And it is always an eye-opening experience. Changing Faces, the disfigurement charity, asked us to develop a website for young people with disfigurement. The site was to be run by the Charity's Young People's Council so it was incredibly important to involve them in the design process from the beginning. We offered two weeks work experience to Council members to help us with the visual design and site functionality, reporting back to their peers throughout the process. Their involvement totally changed the design of the site – the visual route we thought was a sure fire winner was universally canned by the young people and they went for a much simpler option in the end. It was a reminder to us all that we should never second-guess what the target audience wants.

But beware: users' design suggestions shouldn't be taken too literally. It's not the user's job to design your product and their inexpert efforts to do so could be a red herring. What they're brilliant at telling you is what their priorities are, not what colour your logo should be.

How to

Involve your users

Draw the homepage

Ask people to draw your homepage (or other key pages) based on how they think the page should be organised. See what they've put in or left out, and ask them why. You'll quickly learn what the user priorities are and what they're expecting to see.

Share early

Post initial designs or prototypes in your own social media channels or forums. You can ask for open feedback, or if you want something easier to analyse ask for one thing they like and one thing they'd improve. That way it's easier to compare answers. To get opinions outside your current users, make contact with other Facebook or LinkedIn groups connected to your desired audience.

Follow up

You'll start to build a productive, trusting relationship with your audiences if you remember to follow up with them. You get major kudos by reposting revised designs/prototypes showing how you've responded to their feedback. If there was strong feedback that you couldn't take on board, tell them why it wasn't included to show that you're listening.



What we've learned:

Nowadays, when we get users to draw a homepage, people tend to place a horizontal line across the top of the page to represent the main navigation, and a search box in the top right corner. When asked why, generally the response is a quizzical look and "that's just where it goes." This is a big change from five years ago and shows us that people's increasing familiarity with the web means they're making less conscious effort to navigate sites. This means you need to have a really good reason to put core elements somewhere else on a website, because it risks making a site less intuitive to use.

If you do one thing:

Turn your site into breakfast food

What would your brand look like if it were a box of cereal? It sounds daft but thinking about your brand in this way encourages you to see what users think your main priorities are – this is often quite different from what you'd think. Give people a blank template of a cereal box and get them to sketch what should be on the packaging. You can give prompts like "what's the slogan?", "what are the top ingredients", "what free toy do you get inside?". This is a great way of seeing what users think your main message is and in what areas they think you deliver most value. It's also a great tool to use on internal stakeholders to get them thinking about your brand in a fresh way. There's a template on our blog to start you off.



'Get Together'

Tackling loneliness among older people, from Participle.

Loneliness and social isolation can have severe social, financial, physical and mental repercussions.

Currently in Greater London, 250,000 people over 65 do not see a friend, neighbour or family member once in a week. 150,000 have no contact with others even once a month. Those figures rise to 3.1 million and 1.8 million, respectively, UK-wide. Loneliness and social isolation can have severe social, financial, physical and mental repercussions, not only for the elderly themselves but also for the families and the welfare systems that support them.

Current solutions are letting the older population down, so in response, Participle prototyped a new service called 'Get Together', working in partnership with Westminster City Council. To research the service, Participle worked with over 50 socially isolated people in Westminster, giving them a unique insight into their world. They also spent time watching and interviewing Westminster Council service delivery partners, such as meals-on-wheels, mobile libraries and sheltered and residential housing units.

The new service provides telephone and in-person social networks by using matching technology to introduce like-minded individuals. They can meet one-to-one or join group phone and face-to-face meetings or activities based around shared interests. It's proved to be highly successful thanks to its research-led innovative approach.

Do desk research



Why do this?

*A lot of your
questions already
have answers
– go out there
and get them.*

Whatever nut you're trying to crack, someone has probably already tried to crack it before. So don't miss the opportunity to learn from other people's data, research and insight (sometimes called secondary research).

We've worked with over 50 charities, and almost always start by searching for existing insight about our target audiences and looking at websites from comparable organisations. Don't view other organisations as a threat; see what you can do that's different. You'll save yourself unnecessary risks by, for instance, avoiding an idea that has already been realised.

Google is an obvious place to start, but it's important to check that sources are credible and that quantitative data is statistically valid.

How to

Do desk research

Use the National Centre for Social Research

We're really pleased to have NatCen as a client, not least because they're doing a great thing: opening up their research archives to the public. In their vast library they have top quality studies relating to everything from teen attitudes to sex and booze, to British attitudes about stay-at-home mothers and fathers.

Well worth a look.

natcen.ac.uk

Competitor analysis

What are competitor organisations doing online to engage with your audiences?

Don't just look for best practice, look for the elements of their site that seem awkward or unloved – you don't want to make the same mistakes. To help clarify your discoveries, try plotting the results on a simple matrix graph, with axis like serious/fun and sparse/crowded.

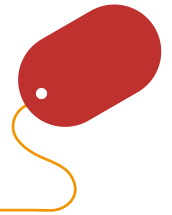
Find profiles (personas) or personal stories

If you're not the teenager facing education choices, the ardent sports fan, or the partner of someone living with an illness, how can you be sure of what might help them?

If you can't talk directly to users, existing profiles (text or video) are the next best thing. Many organisations have them on their sites; use them to visualise what the person profiled is trying to get from your site or app. They'll also help reveal the context in which they might use it. Typing phrases like 'living with [your issue]' or 'being a [user type]' into youtube often turns up great first person accounts.

The personal stories we incorporated into our redesign of BBC My Web My Way reveal a lot about how disabilities can affect the way people use computers.

bbc.in/MyWebCaseStudies



What we've learned:

Newsround asked us to find out how 7-12 year olds discover and react to news. We researched existing sources alongside holding workshops with children and teachers.

Swapitshop's monthly survey data (children self-reporting their activities) revealed that major current affairs stories rarely pique kids interest. A few topical items made it into the 'most talked about list': Halloween, heavy snow, Olympics, and Swine flu, but these were blips compared to the persistent appearance of football, computer games, schoolwork and girlfriends/boyfriends.

Disheartened at first, we realised we could turn 'snow', 'schoolwork' and 'games' to our advantage. 'Snow' was directly affecting their lives at the time, 'schoolwork' filled 60% of their day, and analytics revealed many current Newsround users came from game-based sites. If Newsround could make news relevant to children's personal and school lives and more interactive, they could be onto a winner. This theory was backed up by our user research.

If you do one thing:

Share your research!

The commercial sector doesn't like to share its audience research for fear of competitive advantage. Thousands of research docs are squirreled away collecting dust in filing systems. It's a tragedy!

Let's not make the same mistake in our sector. Of course there's competition among charities with similar goals, but ultimately if everyone shares what they know then everyone benefits. So let's declare a Research Amnesty. If you've got something interesting, be it survey results or user profiles, upload it to our Scribd and share the insights.

Use it yourself



Why do this?

You can test your own products for free. If you don't like using them, no one else will either.

It's easy to lose sight of how we appear to the outside world. Brand communications are often the responsibility of more than one team – the person writing copy for your website may not be the same person that produces your mailouts or writes your tweets. So put yourself in your users' shoes.

When thinking about users' reactions to you, try starting with your own. They are not a different species, they're people just like you. Being on the receiving end will help you to discover errors that can damage your brand such as broken links, typos, overwhelming newsletters, and irritating forms.

And don't forget your social media channels. Do you like the way you sound and is the tone appropriate and consistent between your Facebook and Twitter? Have faith in your own reaction and response – it can help to guide your decisions.

How to

Use it yourself

Sign up for your newsletter(s) right now!

Register to get your e-communications and open the next newsletter you receive. Which bits are eye catching or sound really interesting and which bits did you skip? Which bits seem punchy and insightful? Do this with three more - is there a pattern in what works well and what could work better? Sign up your family and friends too; they'll be honest with you!

Pretend you don't have internal systems

If you want to know something about your own organisation, you probably use your intranet or other internal network. Try finding information as the user would have to, i.e. through your website. If there's better images and information in your internal libraries than on your site, you're not promoting your brand as well as you could be.

Turn Javascript off

Browse around your site with Javascript disabled so that you see what non-Javascript users see. Does it still work? Is it still a pleasure to use? Around four per cent of people will be using your site in this way. They include people using assistive technologies like screenreaders as well as IT staff who may turn it off for security reasons. Many mobile devices don't come with Javascript interpreters so it's increasingly vital that your online services work elegantly regardless of where and how people are trying to use them.

Stress test your navigation

On our blog you'll find a handy form (bit.ly/PZStressTest) designed to show what it's like for users to navigate your site if they land on a page via search. Do they know where they are and how to get around or are they a bit lost? Start on a page that's quite deep down and see how easy it is to answer the questions on the form. It only takes ten minutes.



What we've learned:

This book is part of a set we're writing about different things our sector can do to make better digital stuff. Since writing our first book, *The Online Campaigning Handbook* (<http://bit.ly/PZCampaignHB>), we've done some research into what people thought of it. Happily everyone's been very nice about it but there was room for improvement. Some of the things readers pointed out:

- 1) It looks a bit serious;
- 2) We haven't put in enough of our own work examples;
- 3) It looks pretty on your desk but isn't very shareable.

So we've tried to incorporate that feedback to improve this one. We've also republished each chapter on our blog and tweeted them to make it easier share.

If you do one thing:

Stalk yourself on social networks

Follow your organisation on Twitter or become a fan on Facebook and keep an eye out for posts every day. Think about which ones gave you an emotional reaction – made you smile, made you angry and most importantly, which made you want to find out more. The style of your social media messages has a huge impact on how effective they are. If a status update left you flat, your users may well have felt like that too. If there was a link and you didn't feel like clicking, what would have made you do so?

Pause and take stock



Why do this?

Don't develop a strategy until you've drawn conclusions from research.

Doing research is pointless unless you can apply what you find. A lot of feedback can feel a bit overwhelming so try to categorise insights. For example, if one user complains that you don't update your news pages often enough, and another is reluctant to donate because they're not sure how the money is spent, there's a link – you need to get better at telling your audience what you're up to.

You should listen to your users as often as possible, but that doesn't mean you need to be in a continuous process of redevelopment. Build moments into your schedule where you can take stock of what you've found out.

How to

Pause and take stock

Appoint a third party

There's huge value and enjoyment to be had in trying out user research yourself; however, it can sometimes be hard to stay objective or turn a chorus of voices into clear insights. External expertise can be really useful at the analysis stage (or if you simply don't have time to carry out the research yourself) and of course we're more than happy to help! (Well there had to be a plug in here somewhere didn't there?)

Keep your organisational goals in mind

Thinking about your research findings in the context of your overall goals will create structure around your analysis and help prioritise emerging requirements. For example, if fundraising is your top goal then you might want to spend time fixing any issues in your donations form and the user journey to get there.



What we've learned:

During the development of The Prostate Cancer Charity website, we invested a month in user research, spending time exploiting many of the techniques in this book and talking to teams in the organisation. However, the key moment was not sitting face-to-face with a user, or pouring over analytics; it was when representatives from across the charity came together to discuss the conclusions.

It was a great meeting because it gave internal teams a chance to think about the website as a whole rather than just their section. Within an hour and a half we were able to reflect on what users wanted, and create an holistic view of the site's content requirements. It really emphasised to us the value of sharing research right across an organisation.

If you do one thing:

Get anyone who talks to your users (researchers, for instance, or your call centre staff) together for an hour or so and discuss what they've learned from them. Write individual bits of interesting feedback on a post-it note. Then look across the set for similar points that can be grouped together under a theme. Fiddly but fun, this is a great way to see the big themes that are emerging from your research.



Return on investment

How Autoglass made £40million, and Expedia's one form field wonder

Are you sure there isn't one pesky irritation in your online donation form that could be ruining your users' experience?

Belron (the master brand behind Autoglass) invested in an eight-week intensive user research and prototyping exercise across its site and mobile apps to see if they could make improvements. The team doing the work made the promise that if it didn't make the business money, they wouldn't ask to be paid for doing the work.

They produced a number of rapid prototypes to test with users. They also employed a dedicated copywriter as part of their usability team to ensure all content was optimised for readability and persuasion. Through their mantra of 'fail, build, iterate, succeed' the team achieved startling results. The redesigns from the process led to a 15% increase in conversion of visitor purchases, making Belron an extra £40million.

In 2010 online travel firm Expedia did a piece of analytics research to find out why many customers who clicked the 'Buy Now' button on the company's site were not completing their holiday transaction. What they found was amazingly simple – one form field was creating all the problems. "We had an optional field on the site under 'Name', which was 'Company'," Megibow Expedia's VP of Global Analytics said. "It confused some customers who filled out the 'Company' field with their bank name and their bank address rather than home address". This meant that when it came to credit card verification it failed because it wasn't referring to their registered home address. Users were just giving up at this point. Expedia removed the confusing field and made an extra £7.5 million profit that year!

Surprising things we've learned from our research over the years

One of the best things about doing audience research is the constant surprise factor. Here are a few things we've discovered that you might not expect.

Less than 9% of blind people use Braille and that's rapidly decreasing with the range of assistive technologies

The group most responsible for the growth in social media usage is middle aged women, aged 45 and over

Over 50s dominate new web audience

Your users have no idea what a 'browser' is

Users with disabilities have no idea what the term 'accessibility' means

Only 17% of disabled Britons were born with their disability

1 in 7 Britons has a significant hearing loss

More than a third of elderly people only had an outside toilet when they were 10

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Thank You



Public Zone would like to thank the many people who contributed their time and wisdom to this report, including Steve Rogers, Martin Belam, Julia Whitney, Jennie Winhall, Duncan Letcher, Nicky Smyth, Chandra Harrison, and Hannah Forbes-Black.

Special thanks to our very own Head of User Experience, Julie Dodd, and to all our fantastic clients who continue to invest in user research.

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Also available

The Online Campaigning Handbook

Available for download at <http://bit.ly/PZCampaignHB>

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