Look Ma, No Lab
Remote vs. Lab UX Research

and some other things, too

Me & B|P

- Bolt|Peters Founded in 2001
- 163 user research studies
- 1,792 one-on-one interviews
- Clients like Greenpeace, Autodesk, Washington Post, HP, Pandora, and Blue Shield
Transform the personal, social, and cultural role of technology

- in a good way.

How we do it

hey rick rubin,
**Ummm What is UX Research?**

- In-Person
- Remote
- Automated
- **Qualitative** (and not Quantitative, for today)
Who cares?

Stop the arguing.
Designers and Developers and Executives love to make decisions. Just not the same one, usually.

Achieve goals.
Thousands more donations to non-profits, millions of dollars more in sales, etc.

Unseen Behavior.
“From this last B|P study, we learned that external users never knew what their assigned customer was, or what it meant. Blue Shield had assumed they knew, but customers had no idea.

The number is printed on everything, but people never saw it. This changed more than just the website, because they realized it was a bigger problem than only online. Customers needed education to understand that this number was important & what it meant.”
And Then...

- Number was taken off the web interface, for now.
- Customer service now knows to explain to customers or brokers what the number is.
- Removed from voice recognition system

Process for Both Methods is the Same

1. Recruit
2. Observe
3. Analyze & Report

Wow.
The Whole *Remote Thing*

Remote Research

- Live Intercept
- Technological Ecosystem
Step 1: Recruit

- Users live from the site
- Authentic user interactions
- Realistic user environment
- Easy to set up and manage

(a) DHTML Pop-up Intercept

(b) Screener Questions

(c) Call Participant

<table>
<thead>
<tr>
<th>Participant</th>
<th>Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 2: Observe

- User installs Ethnio plug-in, VOIP calls users
- Screen sharing, audio capture
- Note critical issues
- Behavior repeats over small sample

Moderator - San Francisco

Participant - San Antonio

Google
Step 3: Analyze...

Video
... and Report

1. Here’s what we found.
2. Here’s what you should do.
3. This is the supporting data so you don’t argue.
4. Please fix it.

Measurable Gains

- Restoration Hardware sales increase: 216%
- Legal Software site revenue increase: 325%
- Large Insurance Company conversion increase 25% (millions and millions of dollars)
The Whole *Lab* Thing
The B/P Facility

The facility will have 4 computer stations, two camera, and two microphones. Each station will have a computer, projector, and microphone. The camera will be mounted on a tripod and will be used to record the participants' facial expressions and body language. The microphones will be used to capture the participants' speech. The facility will be designed to simulate a real-world setting.

**Individual Game Stations**

Each station will have a computer, projector, and microphone. The computer will be used to run the game, and the projector will be used to display the game screen. The microphone will be used to capture the participants' speech. The facility will be designed to simulate a real-world setting.

**Live Observation Room**

This room will have four computer stations, two cameras, and two microphones. The cameras will be used to record the participants' facial expressions and body language. The microphones will be used to capture the participants' speech. The facility will be designed to simulate a real-world setting.

**Remote Observation**

This room will have four computer stations, two cameras, and two microphones. The cameras will be used to record the participants' facial expressions and body language. The microphones will be used to capture the participants' speech. The facility will be designed to simulate a real-world setting.

**Executive Observers**

B/P suggests taking the following steps to ensure a smooth observational experience for the executive observers who may attend:

- Complete the pilot stage
- A successful observation session should be observed at the B/P site
- Double the video budget for these evaluations

Librarians are equipped by rewatching the recorded data. The librarians will be able to remotely view the data and make notes on it. Additional notes in B/P staff.
Let's Compare

Is This Thing Fun?

This will be the immersive model. We will test to ensure measuring gameplay data. Using a second PC, another mechanism, such as the player's game AR, the player will answer questions about their experience playing — right in their environment. After a plan, they will complete a more detailed survey about their experience. We will collect data from both plans. Initially, surveys will be taken about whether or not they would like to play the game, and their diagnostic level is — is their current

Immersion Gameplay Experience Model

![Image of immersion gameplay experience model]

- Reality kinesthesia, challenge based immersion, and imaginative immersion
- Reacting to the environment and actions in the game
- Physical feedback
- Accurate, non-invasive
- Seamless, fluid experience
- Seamless, fluid experience
- Novel, engaging, and immersive

Arms, hands, and feet were immersed by players in different scenes. The level of immersion reported is higher on the left hand side. (Source: Immersive Technologies' data report)
# Methods

<table>
<thead>
<tr>
<th></th>
<th>Pros</th>
<th>Cons</th>
<th>Ballpark Costs &amp; Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote</td>
<td>logistics, geographic diversity</td>
<td>facial expressions of users not visible. Only 10-15 users.</td>
<td>$5k - $45k 1 - 4 Weeks</td>
</tr>
<tr>
<td>In-person</td>
<td>facial expressions, collaboration</td>
<td>logistics, cost</td>
<td>$15k - $60k 4 - 6 Weeks</td>
</tr>
<tr>
<td>Automated</td>
<td>large sample data - 1,500 users</td>
<td>no human involvement</td>
<td>$10k - $30k 2 - 3 Weeks</td>
</tr>
</tbody>
</table>

## More Comparisons

Peter Merholtz made this table

<table>
<thead>
<tr>
<th>Timing</th>
<th>Lab Usability</th>
<th>Remote Usability</th>
<th>Field Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation (Plan, Protocol)</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
</tr>
<tr>
<td>Recruiting</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
</tr>
<tr>
<td>Conducting Interviews</td>
<td>3 days</td>
<td>3 days</td>
<td>4 days (5-6 with travel)</td>
</tr>
<tr>
<td>Analysis</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
<td>1-2 weeks</td>
</tr>
<tr>
<td>Totals</td>
<td>4-7 weeks</td>
<td>4-7 weeks</td>
<td>4-7 weeks</td>
</tr>
</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th></th>
<th>Lab Usability</th>
<th>Remote Usability</th>
<th>Field Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentives</td>
<td>$600-1200</td>
<td>$600-$1200</td>
<td>$1200-$1800</td>
</tr>
<tr>
<td>Equipment (Camera, tapes)</td>
<td>$400-600</td>
<td>$50 (audio tapes)</td>
<td>$400-600</td>
</tr>
<tr>
<td>Travel</td>
<td>$0</td>
<td>$0</td>
<td>$0 - $3000 (Air, ground, lodging, meals)</td>
</tr>
<tr>
<td>Facilities</td>
<td>$0 - $1,000/day</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Phone charges</td>
<td>$0</td>
<td>$200</td>
<td>$0</td>
</tr>
<tr>
<td>Totals</td>
<td>$1000-$1800</td>
<td>$850 - 1450</td>
<td>$1600 - $5400</td>
</tr>
</tbody>
</table>
And another comparison

<table>
<thead>
<tr>
<th></th>
<th>Pros</th>
<th>Cons</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderated</td>
<td>Logistics, geo. diversity, native environment</td>
<td>No facial expressions. Only small sample.</td>
<td>Not enough time for in-person, Deep insight</td>
</tr>
<tr>
<td>Automated</td>
<td>Large sample data - 1,500 users</td>
<td>No human involvement.</td>
<td>Large internal audience. Verify UI decisions</td>
</tr>
<tr>
<td>Remote Card Sorting</td>
<td>Speed, Large Sample</td>
<td>Can miss interaction</td>
<td>Answer IA questions in a hurry</td>
</tr>
</tbody>
</table>

When to Use Remote versus Lab

<table>
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<tr>
<th></th>
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<th>Remote</th>
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</table>
Why its time for Remote Methods

1. Everyone (well almost) is online!
   1. Hard to reach samples
2. Catch users in their native environment
3. Travel for work sucks
4. No time for in-person ethnography
5. Rich interactions are possible (broadband penetration, audio, visual, AJAX/Flash)
6. Its less expensive

Remote Research Landscape
Questions