REMOTE RESEARCH

Real Users, Real Time, Real Research

by NATE BOLT and TONY TULATHIMUTTE

foreword by Peter Merholz

FRosenfeld

REMOTE RESEARCH

Nate Bolt Tony Tulathimutte

8



i Enter code RRDE for 15% off any Rosenfeld Media product directly purchased from our site: rosenfeldmedia.com

How to Use This Book	viii	
Frequently Asked Questions	xii	
Foreword	xviii	
CHAPTER 1	1	
Why Remote Research?	1	
The Appeal of Lab Research	3	
Is Lab Research Dead?	7	
What's Remote Research Good For?	15	
When to Go Remote	23	
Moderated vs. Automated	35	
When to Use Which Remote Method	38	
Chapter Summary	42	
CHAPTER 2	44	
Moderated Research: Setup	44	
Gearing Up: Physical Equipment	45	
Doing a Pilot Test Right Now	48	
Preparing for a Real Study	53	
Drafting the Research Documents	62	
Chapter Summary	80	
CHAPTER 3	82	
Recruiting for Remote Studies	82	
What's "Live Recruiting"?	84	
Live Recruiting Using Forms and Pop-ups	90	
Designing the Screener	101	
Paying Remote Recruits	110	
Choosing Good Users and Spotting the Fakers	113	

ii Table of Contents

Recruiting Slow? Don't Sit Around—	
Fix the Screener	117
Wait! Read On	124
Chapter Summary	125
CHAPTER 4	127
Privacy and Consent	127
Certain Assumptions	128
Set Up Your Web Site's Privacy Policy	130
Basic Participation Consent	132
Consent to Record	142
International Consent	146
Consent for Minors	156
Chapter Summary	163
CHAPTER 5	165
Moderating	165
Moderating Introducing the Study	165 167
•	
Introducing the Study	167
Introducing the Study Time-Aware Research and Going Off-Script	167 177
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking	167 177 182
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers	167 177 182 193
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers Quiet, Chatty, Bored, Drunk, and Mean	167 177 182 193 200
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers Quiet, Chatty, Bored, Drunk, and Mean Ain't Nothing Wrong with Using the Phone	167 177 182 193 200 208
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers Quiet, Chatty, Bored, Drunk, and Mean Ain't Nothing Wrong with Using the Phone Wrapping Up	167 177 182 193 200 208 213
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers Quiet, Chatty, Bored, Drunk, and Mean Ain't Nothing Wrong with Using the Phone Wrapping Up Chapter Summary	167 177 182 193 200 208 213 214
Introducing the Study Time-Aware Research and Going Off-Script Smart Note Taking Working with Observers Quiet, Chatty, Bored, Drunk, and Mean Ain't Nothing Wrong with Using the Phone Wrapping Up Chapter Summary	167 177 182 193 200 208 213 214 216

iii Table of Contents

Different Kinds of Automated Research	227
Task Elicitation	229
Remote Card Sorting	250
Surveys	260
Other Methods	262
Where Do I Learn About Tools?	270
Chapter Summary	271
CHAPTER 7	273
Analysis and Reporting	273
Moderated Analysis	274
Automated Analysis	284
Reporting	295
Not All Research Is Research	310
Chapter Summary	314
CHAPTER 8	316
Remote Research Tools	316
Screen Sharing	318
Recording	343
Automated Tools and Services	354
Chapter Summary	376
CHAPTER 9	377
New Approaches to User Research Top Secret (Reverse Screen Sharing and	377
Remote Access)	378
Mobile Device Research (Smartphones)	384
One-to-Many Remote Moderating (Video Games)	388

iv Table of Contents

Portable Testing (Cars)	403
Staying Current	414
Chapter Summary	415
CHAPTER 10	416
The Challenges of Remote Testing	416
Legitimacy	417
Not Seeing the Users' Faces	418
Technology Failures	420
Not as Inexpensive as You'd Think	423
Organizational Challenges of Web Recruiting	424
Getting the Right Recruits	425
Natural User Behavior	427
Multitasking	429
Security and Confidentiality	430
Persistent Negativity	431
Chapter Summary	433
CONCLUSION	435
Don't Waste Your Life Doing Pointless Research	435
Index	441
Acknowledgments	460
About the Authors	463

Remote Research By Nate Bolt and Tony Tulathimutte

Rosenfeld Media, LLC 457 Third Street, #4R Brooklyn, New York 11215 USA

On the Web: www.rosenfeldmedia.com Please send errors to: errata@rosenfeldmedia.com

Publisher: Louis Rosenfeld Editor: Marta Justak Copy Editor: Chuck Hutchinson Interior Layout Tech: Danielle Foster Cover Design: The Heads of State Indexer: Nancy Guenther Proofreader: Dan Foster

© 2010 Rosenfeld Media, LLC All Rights Reserved ISBN: 1-933820-44-6 ISBN-13: 978-1-933820-44-6 LCCN: 2009936925 Printed and bound in the United States of America

DEDICATIONS

Nate: To my family, friends, colleagues, teachers, and loved ones

Thanks for listening to me ramble on about this field for so long. *Tony:* To Mike Hardnett and Renee Zalles

HOW TO USE THIS BOOK

Who Should Read This Book?

This book is about *remote user research*, which is a method of using Internet tools and services to conduct user research with participants who are in another location. (User research, in turn, is the field of studying how people interact with technology.)

Are you a user experience/human-computer interaction practitioner? If so, you're totally gonna love this book, especially if you've ever been frustrated with current in-person or lab methods of user research for any of the several reasons we describe in Chapter 1. If you're a software or Web developer looking for insights into your own (or your competitors') designs, or an interaction designer or consultant, you'll probably dig this book too.

Is there anyone this book *isn't* for? You don't *need* to be a veteran user-experience researcher to understand what we talk about in this book, although we do focus mostly on the "remote"

HOW TO USE THIS BOOK

aspects of remote research. You won't find much advice on how to conduct user research *in* general—for that, a great place to start is Mike Kuniavsky's Observing the User Experience.

What's in This Book?

Remote Research is a how-to book about remote research methods: using a phone and the Internet to conduct user experience research from a distance.

In the **Introduction and Chapter 1**, you'll get an overview of what remote research is all about, when you should and shouldn't use remote methods, and the two main kinds of remote research studies: *moderated* and *automated*.

In **Chapters 2 through 5**, you'll learn how to set up, recruit, and conduct a basic remote moderated study. We describe a method called "live recruiting," which involves intercepting visitors to your own Web site to participate in your studies immediately. We also discuss the