HANDBOOK OF GLOBAL USER RESEARCH
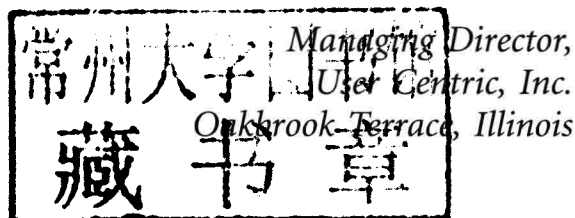
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The Handbook of Global User Research

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The Handbook of Global
User Research

"Our products increasingly are finding their way around the world. Usable designs need to reflect the diversity of those global users if they are going to be successful, and not just the perspective coming from one lab in a corporate headquarters. Robert Schumacher's *Handbook of Global User Research* is like a GPS system for navigating the complexities of that diversity. It is packed with an incredible amount of practical advice, useful tips, and warnings about potential disasters." - *Arnie Lund, PhD, CUXP, Director, User Experience, Microsoft*

"Collectively, the authors bring decades and decades of hands-on experience to this book—and it shows. *The Handbook of Global User Research* offers a wealth of practical tips and advice you can readily rely on in your daily work. But it's not just a list of do's and don'ts: this book provides in-depth discussions and history of each topic covered. Anyone doing user research across borders should have a copy of HGUR on their shelf." – **James Kalbach, User Experience Consultant, LexisNexis, author of *Designing Web Navigation*.**

"The authors show the well-earned battle scars of extensive global user research. We do global testing with regularity and learned a lot from the book, but next time I'm hiring these guys to do it with us!" – *Darren Kall, Senior Director Global Experience Design, LexisNexis*

"*The Handbook of Global User Research* is a must read for any usability practitioner who is serious about conducting effective and unbiased user research around the world. The authors share their secrets on global studies in a very easy-to-read form, and go well beyond previous texts that only cover cultural differences in the design process." – *Edmond W Israelski, Senior Human Factors Scientist, Abbott*

"Researchers, designers, evaluators, engineers, marketers, and business managers worldwide will find this handbook of great value in making products and services more usable, useful, and appealing. The chapter authors not only provide an excellent survey of the field and describe key challenges to professionals, but also they provide detailed practical advice that will make this book a valuable asset for everyone involved in the development process." – *Aaron Marcus, President, Aaron Marcus and Associates, Inc.*

"In the *Handbook of Global User Research*, Robert Schumacher has assembled a strong collection of experts who provide significant insight throughout the whole life cycle of product and service oriented user research. From initial planning to the presentation of research results, this book presents important guidance for the practitioner from a truly global perspective. Even with 30 years of HCI experience, and now managing UI teams located in 8 countries that collaboratively create software for multinational customers, I found a lot of gems in this new handbook. For those with less global experience it will be even more valuable. This volume clearly supports Schumacher's bold assertion that "user research is *the* tool for tool building" required as the first step to deliver excellent design." – *Daniel Rosenberg, Senior Vice President, SAP User Experience*

To Mary Cate, Ryan, Alex, Catherine, and Adam

– Bob

Preface

I met Tim Bosenick, the managing director of the German usability firm SirValUse, in 2003 over dinner in Chicago. He was in the United States with his client, a Japanese usability consulting firm, and their end-client, a large electronics firm, to test the interface of a piece of office equipment. During dinner, we talked about global user research projects and the layers of complexity that make them especially interesting and challenging. This discussion was the seed that germinated into this book.

As consultants in user experience research, my collaborators and I have seen an increasing percentage of work dedicated to global usability during the past few years. Our discussions with others in the field have revealed that practitioners could benefit from sharing their experiences and methods for conducting quality global research with their global colleagues. The purpose of this book is to impart practical, no-nonsense information on global user experience research from a number of knowledgeable sources from throughout the world, each drawing on a broad range of experiences.

As with any sort of large-scale undertaking, global user experience research presents its own set of unique challenges. Researchers have to understand how to deal with potential differences in

- Language
- Culture
- Design sense
- Testing philosophies
- Skill sets

These can be formidable issues. Aspects of the research process differ from culture to culture. What may have worked in Malaysia may not be accepted in Russia, may be done differently in Brazil, may partly work in China, and may completely fail in the UAE.

Equally vexing but often less noticed are the technical, logistical, and planning issues associated with global user, such as hiring qualified translators, region-specific payment procedures, travel issues, global facility setup, and recruiting test participants. This book will *not* cover the globalization and localization of user interface design because there are already many excellent books on this topic.

A note about terminology is in order. There are many ways of referring to the "user experience" and the activities we conduct to understand the user experience, or "user experience research." For brevity, we will simply use the term "user research." At its broadest application, user research is meant to support the understanding of not only the user's specific experience but also relevant information about users themselves and the context in which

they live and work. Although a few of our readers might take issue with this particular phrase, I ask your indulgence since I believe "user research" conveys the intended meaning in fewer syllables.

This book is a global collection of experience-based information *for* user experience research professionals *by* user experience research professionals. This book provides insights into the preparation, fieldwork, analysis and reporting, and overall project management for a global user experience research project. It includes examples of issues involved with global user experience research and approaches to these issues. The chapters are arranged according to a typical project timeline so that you can refer to strategies for each step of a project. Problems, solutions, anecdotes, case studies, and outcomes from actual practice are included to illustrate tactics for the practitioner. We also review emerging trends and issues, such as remote user testing and managing cross-cultural distributed teams. Overall, we are proud to say that our book includes hard-won, best-practice advice in key topics as well as case studies to demonstrate real-world application of strategies.

The book has been written with many voices – contributors from East and West, developed and developing nations – and through multiple languages. We have tried to make the book as relevant to a researcher from China wanting to test in Peru as for a British researcher testing in the United States. Attempting to keep perspective was at times difficult, but we have found our voice with the expertise of our contributors (many of whom regularly collaborate on projects through the User Experience Alliance, http://www.UXalliance.com).

As user research professionals, we assist clients in solving different types of research problems, ranging from consumers who download ringtones to diabetes patients who use insulin pumps to business users who seek the latest information about polymers. Although each of us has invested time in documenting procedures for usability, human factors, and other types of user research, these procedures are not usually focused through the prism of global research. As our clients' products and services extend across borders, we must also effectively cross those borders in our user research. Communication among user research professionals is imperative so that we can learn from each others' experiences and advance the practice of high-quality international research.

We realize that this book is by no means the last word on the subject. We acknowledge the possibility that readers may take issue with a given point. That is to be expected and is healthy for a growing field such as global user research. The intersection of culture and language, among other things, with user research is vibrant and will never be definitive. In hopes of continuing the dialog in a more dynamic form, readers are encouraged to visit the accompanying Web site http://www.GlobalUserResearch.com. A Wiki on global user research as well as supplementary material mentioned and illustrated in this book is available there.

Acknowledgments

Assembling a book with such diversity requires the dedication and skills of many people. With 53 contributors from 25 companies representing 20 countries, there were more than a few details to manage. None of this could have been done without the combined and consistent support of an outstanding group of professionals, my lead contributors: Agnieszka Bojko, Tim Bosenick, Tjeerd de Boer, Frederic Gaillard, Simon Herd, and Thomas Visby Snitker. These contributors were tireless in the coordination, development, and dedication to delivering the quality work in their particular chapters. They also provided constructive comments on other sections of the book. The individual contributors to the chapters (listed in the Author Bios) gave of their precious time to provide insights into the book as a whole and to specific chapters. Their knowledge of and experience in the field of user research provided the foundation on which this book was written.

Equally important to having the book written from the viewpoint of collaborators throughout the world, it was important to have reviewers globally who represented a diversity of thought and opinion. There were a number of reviewers who were not contributors but provided their insights and expertise to the chapter contributors; specifically, we thank Torkil Clemmensen, Owen Daly-Jones, Laetitia Giannetini, José Luis Adán Gil, Changyang Oh, Fernando Oliveira, and colleagues at Snitker & Company.

My collaborators and I owe a debt of gratitude to and are honored to have had the insightful comments of six outside reviewers: Arnold Lund, Ed Israelski, Darren Kall, James Kalbach, Steffen Kehr, and Elisabeth Ling Decitre. These reviewers plunged through pages that were, at times, not quite ripe given the varieties in style, language, approach, and coverage, but they managed to deliver clear and strong guidance nonetheless.

Next, I am truly grateful for the many long hours of reviewing from my colleagues at User Centric: Thomas Green, Cassandra Slimmer, Melinda McElheny, Martin Ho, Heather Rakauskas, Neha Pathak, and, my son, Alex Schumacher. Not only did they do a fabulous job working through the content but also they had to put up with my idiosyncrasies. I also benefited greatly from the assistance of several other very capable staff members – from doing the initial research to the final coordination. Many thanks to Justine Chiapetta, Lisa Morosky, and Krista Smith.

I also acknowledge the forbearance and loving support of my wife, Mary Cate, and my family for sacrificing time together, which is a most precious commodity.

Last, this book would be nowhere without the support, encouragement, and patience of Mary James and Denise Penrose of Morgan Kaufmann. From the earliest discussions

with Mary and Denise in a breakfast room in Florence to this point, you have been enthusiastic supporters from concept to delivery.

I am humbled to have had such a great team of contributors and reviewers supporting the work, helping to keep it on time and on point. Although every attempt has been made to ensure internal consistency and solid coverage of material, any errors of commission or omission are, of course, regrettable and are mine.

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Tim Bosenick is the founder of SirValUse Consulting GmbH, one of the largest user experience research and testing companies in Europe. When international testing became increasingly more important for SirValUse in 2002, Tim started to think about international testing methodologies and quality standards. He has been instrumental in developing the methodological standards for usability testing at SirValUse, in developing international contacts and has conducted dozens of tests and evaluations. His principal interests are the development of new testing methods, standardization of international usability testing and quantification of usability. Tim is a graduate sociologist with foci on methodology and statistics. SirValUse is a founding partner of the User Experience Alliance (UXalliance).

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