

# Ux research

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## Research Approach

The question that drives this research is: “How can we ensure that the generated videos are clear, useful and engaging?”. To answer this question, I have tried to split the question up into smaller tasks:

- Talk with the UX team for expert advice on this research.
- Research if there are any existing guidelines to creating clear, useful and engaging videos
- Survey what my target audience wants to see in the videos
- Create storyboards to have a design of what the videos will look like and what will be in them
- Validate storyboards with UX team for expert advice

## Talk with UX team for Expert Advice

I showed me demo to the UX team, Dylan, Joost and Wouter, and they gave me the following feedback:

- Try to create storyboards, this way it is easier to ask feedback about a video, and you will have a better idea of how to design the video.
- The video is still very static, try to add more animations and interactive elements such as videos, arrows, transitions, anything to make it more dynamic.

- The speaker takes up a very big proportion of the video, maybe try to make it smaller so there is more room for media to be shown.
- The branding also takes up a big margin of the video which leaves less room for relevant media. Maybe only show the branding in the intro video and after the intro remove the branding completely.
- Make the media bigger if possible.

After receiving this feedback, I resized the speaker, removed the branding during the video, added storyboards to my planning, added transitions between videos and thought of how it would be possible to show relevant clips/media rather than images in the explanation video.

## Generic video Guidelines

Videos can be shaped in a million ways and everything is customizable. Therefore I looked online to find guidelines on how to create financial explanation videos.

### What video length works best for financial explanations?

To determine the ideal video length, I looked into existing research about promotional financial content:

- Wistia suggests 1–5 minutes is optimal for engagement. (Fishman, 2025)
- Yand Media recommends 2–5 minutes for explainer videos. (Movsisyan, 2025)

Research shows that after 2 minutes there is a significant drop in engagement. Unlike promotional content, the videos we produce are educational and directly relevant to the viewer's current financial situation. Also are we planning to only create these videos a few times a year. This makes it acceptable, and sometimes necessary, to go beyond the typical 2-minute mark.

That said, the goal is always to keep the content as concise as possible, while still covering all essential information. As a rule of thumb, videos should not exceed 5 minutes unless the complexity of the topic truly demands it.

### What visual elements help explain financial concepts?

What elements are available for use? We have the following resources:

- The portal in client view, screenshots and/or videos of the portal on how to navigate through it.
- Client data, we can plot graphs and diagrams with client data to help them understand their data.

## How should complex financial information be simplified?

We can do this the following ways:

- Explain the topic by talking about it.
- Show relevant visual information.
- Give personalized examples. (is this good survey?)

## What can be surveyed?

- Would you rather have examples for the cost of a longer video?
- Should these examples be generic? Or very personalized?

## Survey

Looking for generic guidelines I noticed that there are multiple topics which include bias. For example: how to explain a topics, in what way to explain a topics, should we include examples, for that reason it would be a good idea to cover these in a survey. This way I can only collect bias from my target audience and leave out irrelevant bias.

For the survey, I first came up with as many questions as possible that we can survey. Those questions are related to how the videos should be shaped, what should be said, how and what media should be shown. In this section, I will evaluate the survey responses collected from 27 iO employees, who are all part of my target audience aged 18 and older

I welcome the participant with an introduction text. From this text the user will understand that the survey is short and will be motivated to finish it. You can answer multiple answers per question so that the participant isn't limited to a single answer. This can be useful if the user can't choose between two answers.

### AI Finance Explainer (±3 min)

**B** *I* U ↺ ✕

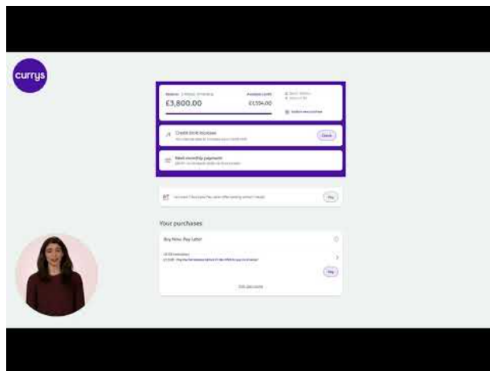
In short, I'm building a tool that automatically generates explainer videos about financial products and videos containing financial advise.

This survey aims to understand what consumers want to see in these kind of videos, including the type of information, visuals, and overall structure.

This survey contains a total of 8 questions. You can select multiple answers.

Then I show the demo video to give the participant an idea of what to expect. Now that there is an idea of what the project is about, we can start with the questions.

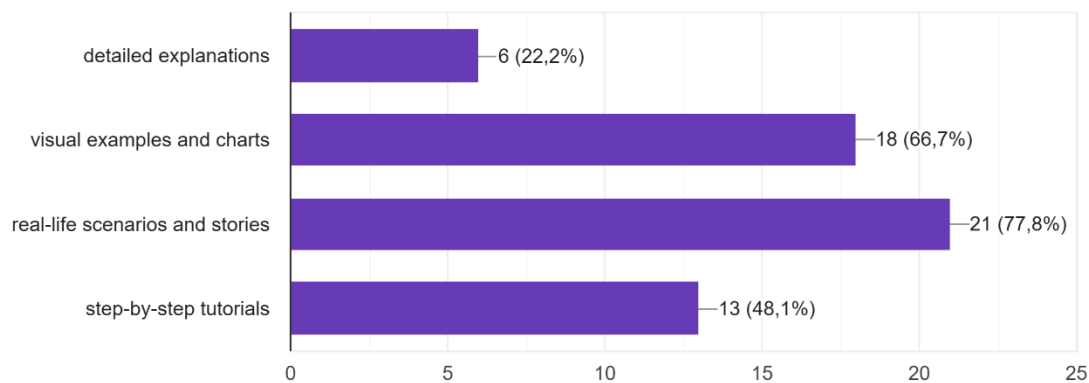
Before getting into the questions, here is a very minimalistic example of what an explanation video could look like. **This video is generated by AI.**



How do you prefer to learn about financial concepts. We can see that the most people have answered “visual examples and charts” and “real life scenarios and stories”. We can see less interest in “detailed explanations” which is good since that would make videos too lengthy according to earlier research. Also do we see intermediate interest in “step-by-step tutorials”.

How do you prefer to learn about financial concepts?

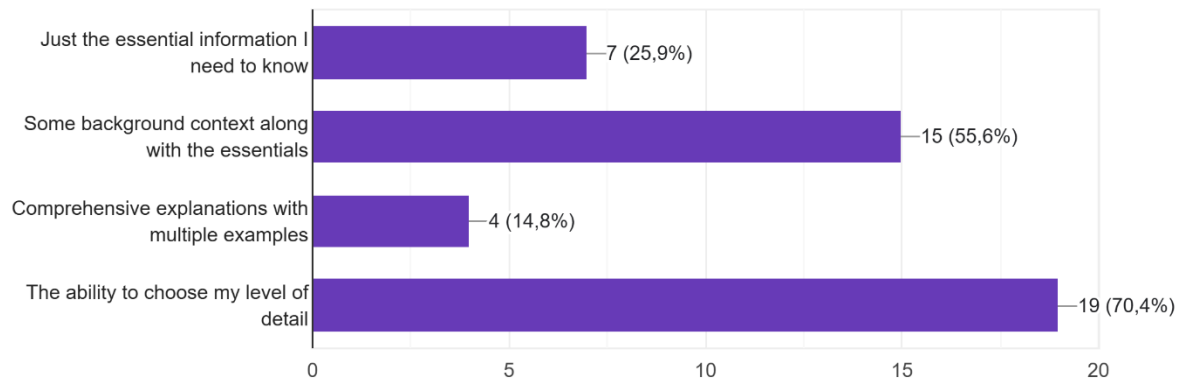
27 antwoorden



When receiving financial information do you prefer; “the ability to choose my level of detail” would be the ultimate solution for every user, but this requires extra input from the user if the tool is to be fully deployed. For that reason, it would also be interesting to know what other option is liked the most, which is “Some background context along with the essentials”. So, if there would not be an option to choose your own detail, or there would have to be a default option it could be “Some background context along with the essentials”.

When receiving financial information, do you prefer:

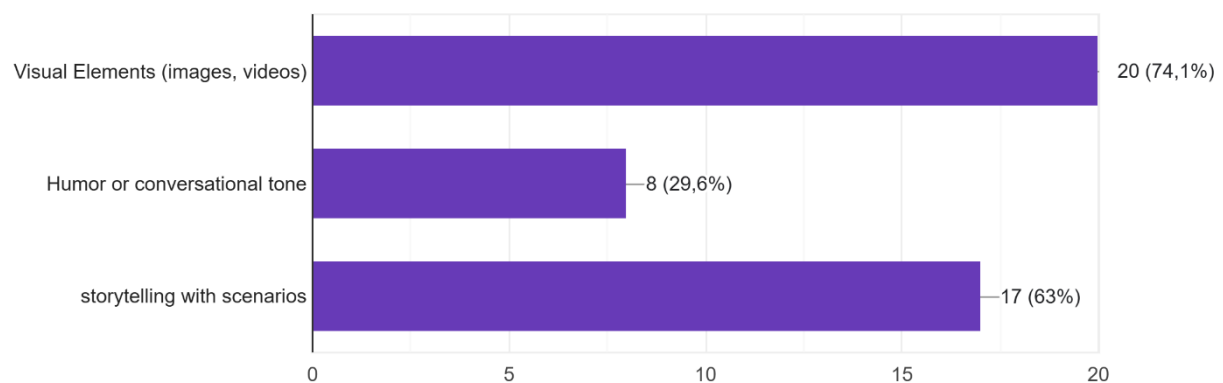
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We see a clear liking for visual elements and story telling with scenarios. Both would be great additions to the videos unlike a humor or conversational tone. Again, ideally you could configure these options yourself.

Which of these would make financial videos more engaging for you?

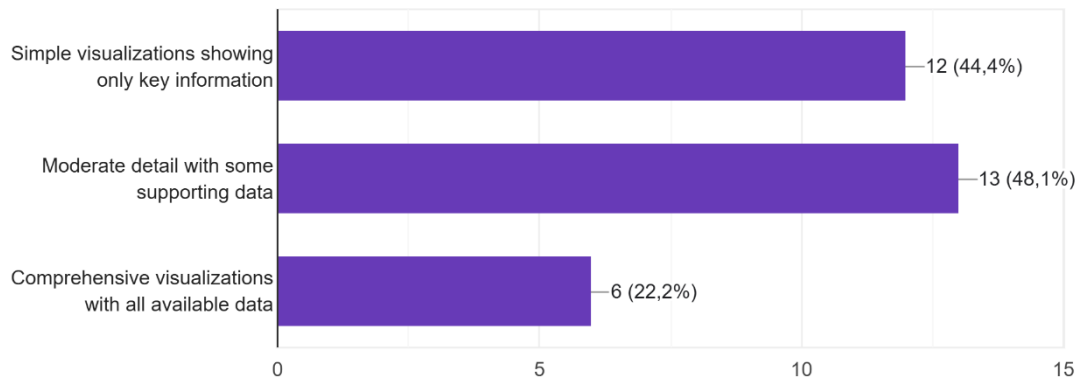
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Using all data available should be avoided. Only show relevant data, with possibly supporting data.

When viewing charts and graphs about your finances, do you prefer:

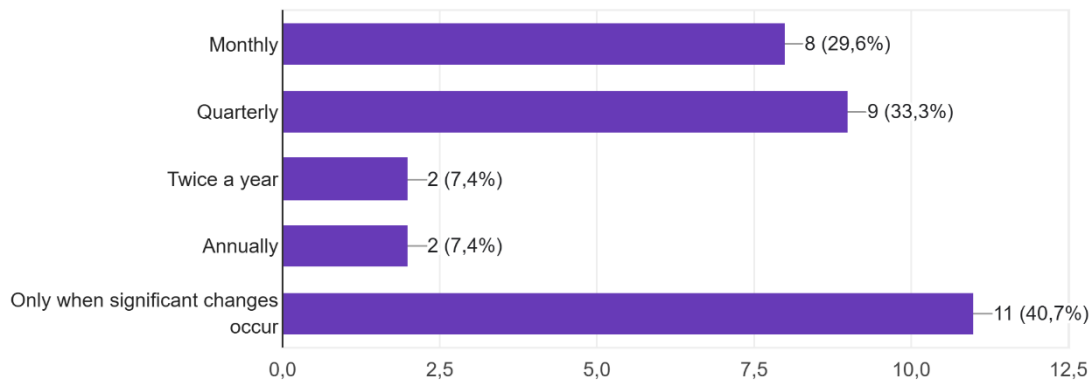
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There is a liking for monthly quarterly and only when something significant occurs. The difference between updates over a static time period and when something significant happens can change the way the videos will be shaped.

How often would you want to receive personalized financial explanation videos / financial advise?"

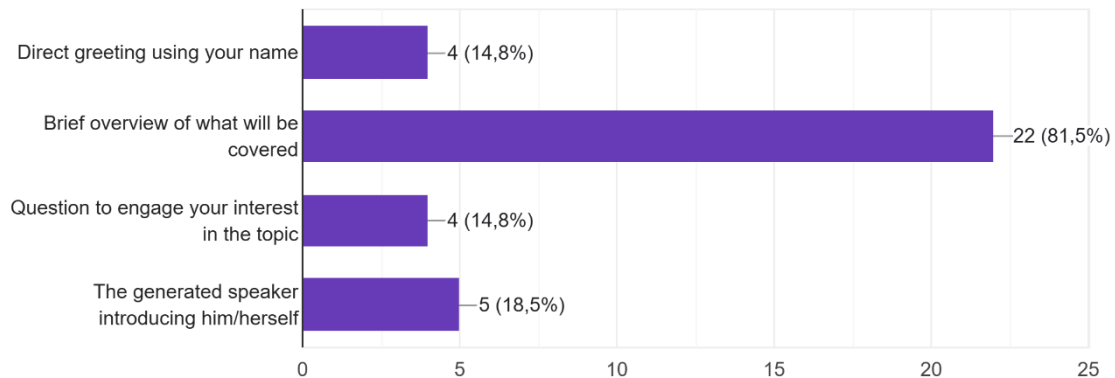
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There is a clear liking to mentioning briefly what will be covered in the video. The others aren't really important but can still be included in the video if the stakeholders want it. Since mentioning the user by its name was something the stakeholders really wanted.

### How would you prefer the video to begin?

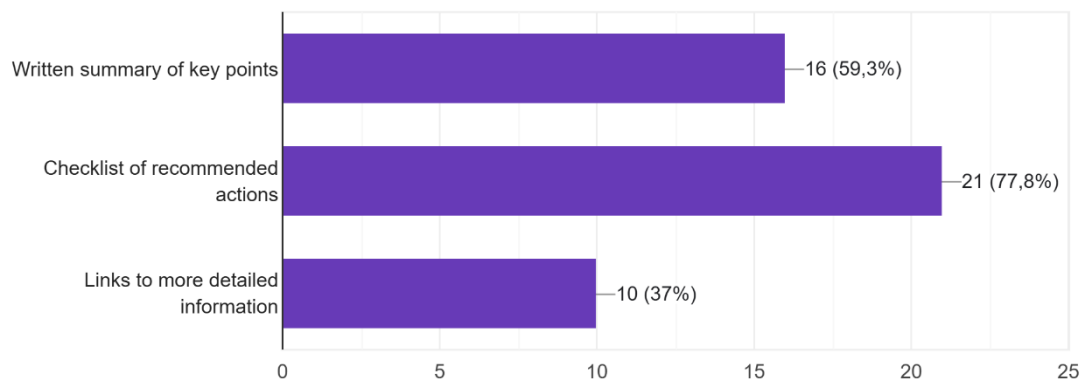
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For ending the video the opinions are divided. For ending the video it could be dependent on what has been covered in the video. If a lot of external information was used, links to more detail would be useful, if there was a lot of information and explanation given or maybe calls to action, a summary of key points and checklist of recommended actions would be more fitting.

### How would you prefer the video to end?

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In the open question there is an important answer which mentions how the content of the video should be dependent on how financial literate the user is. Without additional user input this can be challenging but not impossible.

Anything else which you would like to be added?

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Financial instruments are a complex topic. I would advice to use clear, simple visualisations. And also explain using real world scenarios. For example, "the tesla stock is going down. "You invest \$100 in a Tesla short with a leverage of 4.." etc

How the video should begin massively depends on how these videos are being served to me. It is fine if the video starts with my name when I'm getting this video in my email or my online banking portal (along those lines). However, if I'm just browsing a webshop or financial institutions website and am greeted with a video that calls me by my name directly, I would feel violated (mostly in my privacy). How much information should be in the video is also really dependant on how financially literate the individual already is. I have an ok understanding of most financial products/services, so the info I want is more in the details/context. Someone that isn't financially literate would probably be majorly overwhelmed if you give them too much detail.

Interesting graduation project!

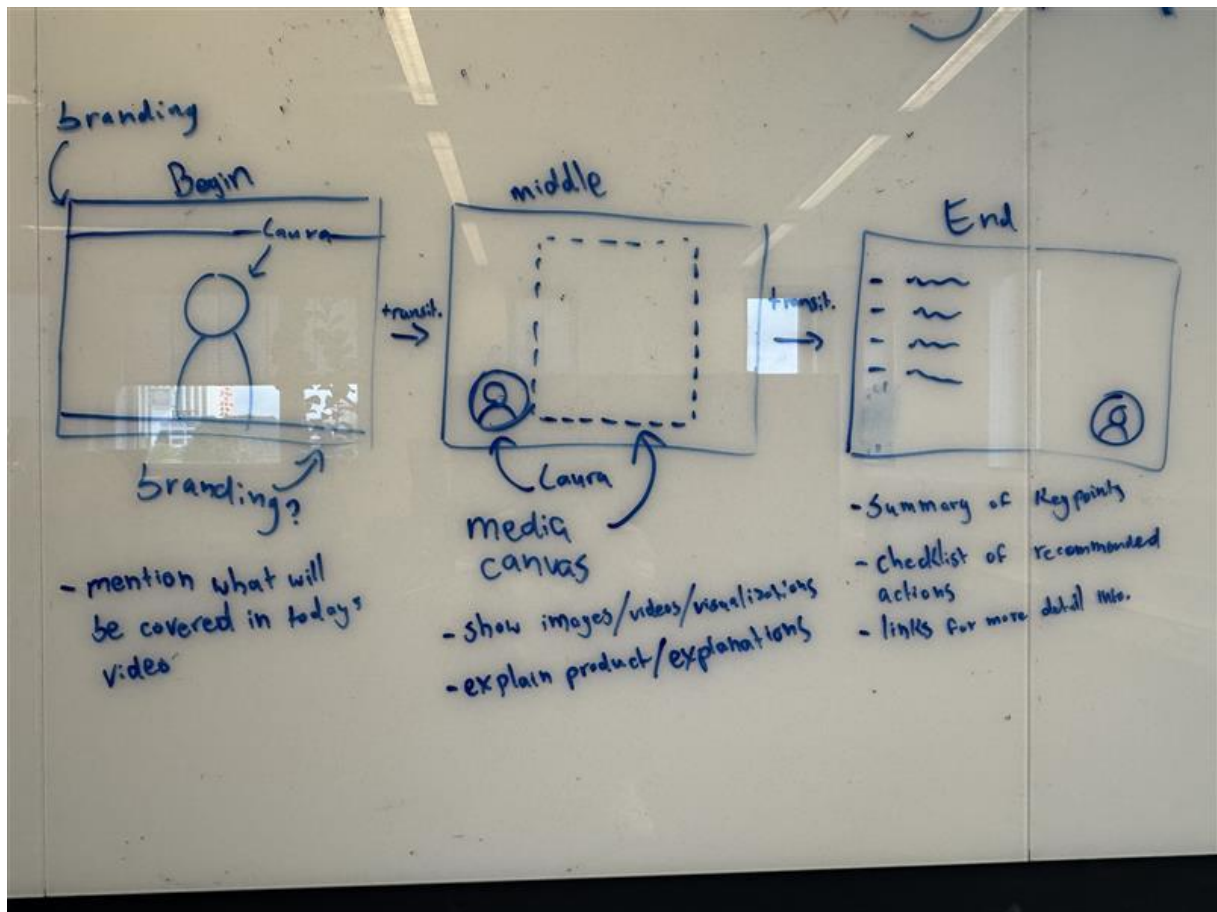
Good luck!

## Create Storyboards

The survey shows what my target audience wants to see in the videos, this helps in making the storyboards, since I now know what to put in these storyboards and finally the video.

The storyboard is divided into 3 panels begin, middle and end. In the first panel the viewer is introduced to the speaker and the video content will be briefly mentioned. In the middle panel the speaker is kept small so there is more room for the media. Media can be anything from images to videos to graphs. Also, explanations will be given in this section. In the last panel, a summary will be given of the complete video with a checklist of recommended actions and links for more information if applicable.





## Validation

To validate my findings, I met with Dylan Fanengo from the UX team. He suggested creating a video using the storyboard and then asking for feedback about it.

I haven't been able to validate a final video which is based on the storyboards due to time constraints.

## References

- Fishman, E. (2025, March 26). *Optimal video length: How long should a marketing video be?* Retrieved from Wistia: <https://wistia.com/learn/marketing/optimal-video-length>
- Movsisyan, A. (2025, March 7). *What's the ideal length for an explainer video?* Retrieved from Yans Media: <https://www.yansmedia.com/blog/how-long-should-my-explainer-video-be>

