



## CHAPTER 6

# 7 Great, Tried and Tested UX Research Techniques

5 min read

Thinking about conducting some user research? Wondering which techniques are most likely to provide useful results? Then look no further.

*"Good design is about process, not product."*

—Jared Sinclair, Designer and Developer at Bloglovin

## 1. Card Sorting

Card sorting was originally a technique used in psychological research long before 'UX research' was a thing. It's a simple concept: you write words or phrases on cards; then you ask the user to categorize them. You might also ask the user to label the categories.

The words or phrases you write on the cards depend on what you're trying to find out from your users. For instance, if you want to find out whether your Information Architecture, or the way your website is arranged, is easy to understand, you could write the different pages of your website down and ask a user to sort them into categories. If, on the other hand, you're interested to examine how users think about financial planning, you could write down different activities ("save money in a bank", "travel once every year", "look out for offers", etc.) and ask your users to sort them by priority.



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There are all sorts of card-sorting techniques, and choosing the right one is important. Better still, there are a bunch of online tools that let you do card sorting remotely, allowing you to use the technique globally and not just locally.



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*Card sorting, an approach that UX research inherited from psychological research, is an excellent, and wonderfully simple, way of assessing what users' priorities are and how their sense of order processes the existing nature of an item in question.*

## Why is Card Sorting a Good Technique?

- It's a very cheap form of research, since face-to-face online tools may be more expensive.
- It's also a very easy technique for users to understand and for clients to understand, too.
- It's a very easy method to get user input (or even to get user validation) for ideas early on in a UX project.
- Preparing a card-sorting study requires next to no effort.

## 2. Expert Review

Expert reviews involve a single 'expert' walking through a product via the User Interface (UI) and looking for issues with the design, accessibility, and usability of the product. There's no fixed process to follow, and the expert review can vary from professional to professional as well as from product to product. The more expertise the reviewer has in usability and UX design, the more valuable the input of that person will be (in most cases).

### Why is an Expert Review a Good Technique?

- It's quick, easy and cheap. This is doubly so when you compare it to more formal usability-testing methods.
- It only takes a single professional to conduct an expert review.
- It is a great way to inform further UX research; however, you should be careful when taking an expert review at face value—don't let it preclude further user testing; instead, dig deeper and see how you might gain more thorough insights.

## 3. Eye Movement Tracking

Knowing where your users are looking when they're using your system can tell you a great deal about where your design's effectiveness stands. Eye movement tracking helps with UI design, and it helps with knowing how to prioritize certain kinds of content. This technique was developed for academic research. Used extensively in medical research, it has become popular and cost-effective enough to be deployed by UX teams, too.

### Why is Eye Movement Tracking a Good Technique?

- Given the ever-improving state of the art in technology, the advancements have long since left bulky and invasive eye movement tracking systems behind. Consequently, EMT has become so sophisticated and discreet that modern systems do not interfere with the results of usability tests.
- Hand in hand with those developments, the technology has become increasingly affordable. EMT may not suit every project budget, but it often won't break the bank, either.

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- The technology has become sufficiently reliable for results to be easy to reproduce and for us as researchers to be able to rely on the outputs we get.
- UX design clients love eye movement tracking. It's a great way to demonstrate why they might want to invest in further usability testing.

## 4. Field Studies

This is actually a number of techniques under a broad heading. It's all about going out and observing users 'in the wild' so that we can measure behavior in the context where users actually use a product. Field studies include ethnographic research, interviews, observations, and contextual enquiry.

### Why are Field Studies a Good Technique?

- There's no stronger form of research than observing users behaving as they will when they use your product. Researchers love these techniques and are often passionate about persuading their clients to take them on board.
- When conducted well, the outputs of field studies provide the deepest insights into user issues and light up pathways towards possible solutions.

## 5. Usability Testing

A firm favorite that has a long and prestigious history in UX research, usability testing is the observation of users trying to carry out tasks with a product. Such testing can focus on a single process, or be much wider in range.



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*Usability testing gives a very clear lens for observing users as they attempt to carry out tasks with a system—not for nothing does it remain extremely popular among researchers.*

## Why is Usability Testing a Good Technique?

- Can you think of a better way to understand what users do than watching them do stuff? Of course, you have to pick the *right* users—they need to be a good representation of the user base as a whole, but that's pretty much the only constraint.
- Usability tests produce specific results that lead to specific actions. Better still, it's very hard for people to contradict decisions based on these tests; it's nearly impossible to refute evidence of user behavior.
- You can bring clients into usability testing easily as observers. This increases their enthusiasm for such testing and shows clearly why such testing adds value.

## 6. Remote Usability Testing

This is usability testing, but without the need to drag users into your laboratory environment. It was once complex and expensive, but technology has moved on, and now it's fairly simple to set up and reasonable value for money, too.

## Why is Remote Usability Testing a Good Technique?

- It often saves time and money when compared to lab testing, and allows for a wider range of participants when you don't have to get them in the lab.
- It is closer to field testing in some respects in that the tests are conducted in the user's environment and not an artificial lab environment. This delivers better results in many cases than a lab environment.

## 7. User Personas

User personas are a fictional representation of the ideal user. They focus on the goals of the user, that individual's characteristics and the attitudes he/she displays. They also examine what the user expects from the product.

We created user personas from other forms of user research; thus, they offer an in-depth, real-life vivid portrait that is easy for the whole team to keep in mind when designing products. Each user persona has a name and a backstory. Moreover, personas inspire the imagination and keep the focus on the user.

## Why are User Personas a Good Technique?

- They are a step above the old user profile and give a more in-depth and specific look at a user.
- They are easy for people to relate to, and they become part of the team as team members constantly speak about them during a project.
- They are a lot of fun, and they tend to be interesting, easy for people to engage with and more memorable than many other research outputs.

## The Take Away

There are many user research techniques, but these seven techniques have been used over the years, in many UX projects, with great results. Each technique provides a different output; so, you should use each one only to serve a distinct purpose.

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To recap, the techniques are:

1. Card sorting
2. Expert review
3. Eye movement tracking
4. Field studies
5. Usability testing
6. Remote usability testing
7. User personas

As designers who can double as researchers, we have a wealth of options at our command in the twenty-first century, options that hail from traditional, or unrelated, fields and ones that have grown with the technologies we have always concerned ourselves with. As the state of the art has lent power to the tools available to us, the price of these has dropped. Consequently, there's no excuse not to use a combination of these techniques in the pursuit of the best design.

You now have 7 new UX research techniques in your toolkit. But which ones should you use in your projects? When does card sorting make sense, and when does it become unproductive? To help you navigate the various ways you ought to be conducting user research, we have created the course "User Research - Methods and Best Practices". Filled with actionable insights, the course ensures you'll never be a novice in user research again.

## User Research - Methods and Best Practices

### Intermediate course

User experience design requires you to understand your users. If you don't know what your users want, you can only deliver what they want by accident. User research is how we come to understand what our users want. It's the largest part of user experience design. Our course **User Research - Methods and Best Practices** will give you insights into all the major UX research techniques, including those covered above, and how to put them into practice on your projects.

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