

标题:用户研究：定量和定性用户体验研究方法的综合指南

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资源: <https://www.userzoom.com/blog/quantitative-and-qualitative-user-research-methods-complete-guide/>

注解 - 这些项目符号上的数字对应于添加到此研究文档中的数字。

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2. 用户研究工具和方法的示例
3. 定量研究的定义
4. 定量研究的好处-“定量数据相对容易收集，不一定要花费很长时间，而且您会发现更容易找到更多的受访者。”
5. 定性研究的定义-“定量研究趋于客观”
6. 定性研究的好处-“您应该希望看到定量数据无法揭示的内容-例如，如果您网站上的网页正在失去访问量，您将能够亲眼目睹真正的用户访问页面。”
7. 同时使用定量和定性方法
8. 定量研究-无节制的测试-“进行研究，找到参与者并分析数据比进行主持会议要容易，便宜和快捷得多。”“但是，您将在“事后”审查结果，将会失去提出更深入问题的机会。因此，如果发生意外情况，则必须进行另一轮测试以进行调查。”
9. 定性研究-主持测试-“与参与者处于现场环境中，可以让您与用户进行对话，同时观察他们在做什么，以更好地了解他们的行为并调查可用性问题和态度。您还可以修改脚本，以探查是否存在令人困惑的区域，并提出特别的后续问题。
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> **User Research: a comprehensive guide to quantitative and qualitative UX research methods**

User Research: a comprehensive guide to quantitative and qualitative UX research methods

(<https://www.userzoom.com/blog/quantitative-and-qualitative-user-research-methods-complete-guide/>)

by Christopher Ratcliff (<https://www.userzoom.com/blog-author/christopher-ratcliff/>)

May 10, 2018

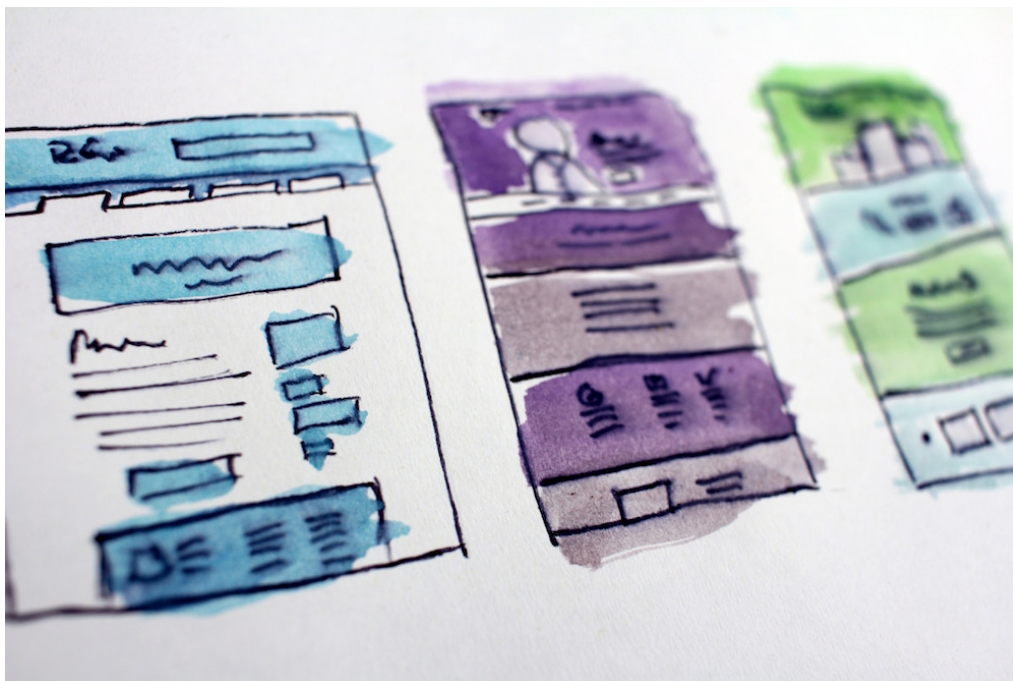
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Whether you're a grizzled UX expert who "has seen everything in the line of duty", or you're a complete newbie who has been told to "do some of that UX stuff (<https://www.userzoom.com/blog/what-is-user-experience-ux-and-why-is-it-so-important/>) that's so popular these days" – this is the guide for you.

Here we'll explain the difference between all the most common UX research methodologies, how they are either quantitative and/or qualitative (<https://www.userzoom.com/blog/whats-the-difference-between-quantitative-and-qualitative-research/>) (and what that actually means), and we'll also discuss the benefits and challenges of running moderated and unmoderated UX studies.

Basically all the stuff you'll hear about when entering the exciting and very detailed-orientated world of user research and testing.

As for the more experienced UXers, think of this as a way to refresh your UX tool kit. Perhaps you've been using the same few methods for the last few projects and you need some inspiration. Perhaps you've been firmly planted in either the qualitative or quantitative camp, and you can't see sense in the other. Perhaps the insights you're revealing just aren't moving the needle enough. Maybe something here will give you the nudge you need.



It's unrealistic and probably unnecessary to use every single methodology on any given project, however a blend of methods across the 'quant and qual divide' can ensure you're getting the maximum number of helpful UX insights possible.

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What is user research?

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User research, sometimes referred to as UX research, refers to the various scientific methods that you can use to understand the thoughts, feelings and behaviours of the people who use your product or service. This understanding can be reached by observing what they do or by directly asking for feedback about their experience.

This user research can help you understand who your customers are, what is important to them, how they actually use your products, what their biggest impediments are and how to fix them. And the most useful UX research is well-planned and organized (<https://www.userzoom.com/blog/how-to-create-a-ux-research-plan/>), which should give you the confidence that the insights are derived fairly and accurately.

The very first stage of planning, and the one that will help you decide which research methodologies to use, is to decide on your research question.

Before you decide on your research question though, first ask yourself why you are running research? What goal are you trying to achieve? What are you trying to improve?

Why are you running UX research? What goal are you trying to achieve? What are you trying to improve?

The answers should help you form your research question, a few examples of which we've included below:

1. Why is our ecommerce checkout (<https://www.userzoom.com/blog/21-expert-opinions-on-ecommerce-checkout-ux/>) abandonment so high?
2. How do we improve the navigation of our website?
3. What CTA yields the largest conversion?
4. How can we increase app downloads?
5. In which category should a product or piece of content sit?
6. How do we compare to our competitors?
7. How are design iterations moving the UX needle?

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Some of these questions can be answered by using a user research tool (<https://www.userzoom.com/>) (#1), analysing data from an A/B test (#3), conducting card sorting or tree testing (#2 and #5), some can be answered by jointly using quantitative and qualitative methods (#6 can be discovered by conducting competitive UX benchmark studies (<https://www.userzoom.com/blog/what-is-competitive-ux-benchmarking-and-why-is-it-so-valuable/>) and #7 through longitudinal UX benchmarks

(<https://www.userzoom.com/blog/what-is-ux-benchmarking-and-why-is-it-so-valuable/>) on your site) or through a combination approach of observing and collecting behavioral and attitudinal feedback (#4.)

For an in-depth and entertaining guide to getting started with user research, read our free-to-download, comprehensive ebook 'User Experience Research 101'

Download 'UX Research 101' (<http://info.userzoom.com/user-experience-research-101.html>)



(http://info.userzoom.com/user-experience-research-101.html?utm_source=ebook&utm_medium=blog&utm_campaign=research_101)

Quantitative vs Qualitative user research

To help you decide how your research question is best answered, here's more about the two main categories of research methods to choose from:

What is quantitative research?

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Quantitative refers to any kind of research where the results can be presented in numbers, i.e. 'how many, how often or how much'. It is often used to add context (e.g. it took users less time to complete the task on prototype A than prototype B) and can be thought of as the "What" data.

For a complex example of quantitative data, just take a look inside the analytics of your website – pageviews, sessions, bounce-rate, frequency of visits over time are all quantitative data and show what happened on the site. Net Promoter Score, ease of use, completion rates, brand perception, time on task, mouse clicks and more are typical examples of quantitative data in UX.

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Benefits of quantitative user research

- Quantitative data is relatively easy to gather, doesn't necessarily take very long and you'll find it easier to assemble a larger group of respondents.
- Fast results.
- Because of the numerical nature of the results it's simpler to tie UX improvements back to your company's KPIs (<https://www.userzoom.com/blog/what-metrics-do-the-experts-use-to-measure-ux-effectiveness/>), therefore justifying investment.
- Quantitative research tends to be objective (i.e. it's harder to 'lead' participants with more complex questions) and more 'scientific' i.e. less prone to human bias (<https://www.userzoom.com/blog/how-to-avoid-bias-in-usability-testing/>).
- Statistical significance – because quantitative studies are run with a much larger volume of participants, they are more representative of the population as a whole.
- It's easy to make nice visualisations from the raw data.
- People love statistics!

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What is qualitative research?

Qualitative refers to any kind of research where the results take the form of observations, comments, thoughts and feelings and allow you to tell a story about the participant's experience. If quantitative answers the "What" then qualitative is the answer to "Why."

This can be further subdivided into behavioral and attitudinal methods. For instance, a behavioral method examines how people use your product. An attitudinal method would then investigate what people think of your product.

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Benefits of qualitative user research

- You'll be inside the heart and mind of the person using your product.
- You should hopefully see things that quantitative data can't reveal – for instance if there's a page on your website losing traffic, you'll be able to witness first hand what happens when a genuine user visits the page.
- Participants may find it easier to reveal their feelings about something, rather than assigning a number or ticking a 'yes or no' box.
- This anecdotal evidence can be more persuasive than hard data – especially if it's emotionally driven and your stakeholders can see and hear these observations for themselves.

Quite simply, qualitative research can answer why or how to fix an issue, quantitative research is better at answering how many and how much.

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Specific research techniques can belong to either the qualitative or quantitative category, depending on how they are used. You will likely find that a blend of quantitative and qualitative research techniques will help you cover all possible bases.

Unmoderated vs. Moderated user research

Another thing to consider when choosing from the variety of user research methods at your disposal, is whether you're going to run the tests 'moderated' or 'unmoderated'. So, whether yourself or a researcher (a moderator) is going to be present during the test, or whether the test participant is left to carry out the task without anybody else in the room.

Here's a little more detail on both options:

What is unmoderated testing?

Unmoderated tests (<https://www.userzoom.com/blog/how-to-design-a-remote-unmoderated-usability-test/>) are how we describe unobserved tests, where a participant is left alone to complete tasks without the presence of a moderator. These sessions can be recorded for later viewing as part of a qualitative study, or the data is collected and analysed as part of quantitative research, or both.

In an unmoderated test, a participant will interact with a digital product while being prompted with questions or tasks. A UX researcher will then look at the results of the project and take note of where the participant is experiencing problems.

You will need a specific online platform or service to help you accomplish unmoderated tests. The service will also help you build the study, find participants and analyse the data. This can be a lot easier, cheaper and quicker than running moderated sessions.

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However as you will be reviewing the results 'after the fact', you'll be missing the chance to ask more in-depth questions. So if something unexpected crops up, you'll have to launch another round of tests to investigate.

What is moderated testing?

In moderated testing (<https://www.userzoom.com/user-research-methods/>), the participants are observed by a moderator, either in-person or remotely. The core reason for getting into a moderated session is so that you can be in a live setting with a participant.

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This allows you to have a conversation with your users as you're observing what they are doing to better understand their behavior and dig deep into usability issues and attitudes. Plus, you can modify your script on the fly to probe more if there are confusing areas and ask ad-hoc follow-up questions.

Speaking of ad-hoc questions – another advantage to conducting moderated sessions is that you can have stakeholders and teammates anonymously observing the sessions. This is a great way to include folks who are not usually involved in user research and usability testing to participate and send you questions to ask the participants.

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Types of user research methods

Here are examples of some of the most common techniques used to carry out UX research. Many of the following methods can be run as either moderated or unmoderated and can be used to gather quantitative or qualitative feedback depending on how you set up your study, but we've given the most common approaches that we and our customers use them for.

A/B Testing

(Quantitative / Unmoderated)

A/B testing (<https://www.userzoom.com/blog/a-comprehensive-guide-to-ab-testing/>) requires you to use a third-party piece of software that helps you set up two different web pages, where one page has an element that's slightly altered from the other. For instance, if you can't decide on the text for a 'buy' button, you could use an A/B test to present one version of the button that says 'add to cart' to half your traffic, and the other version that says 'buy now' to the other half of your traffic.

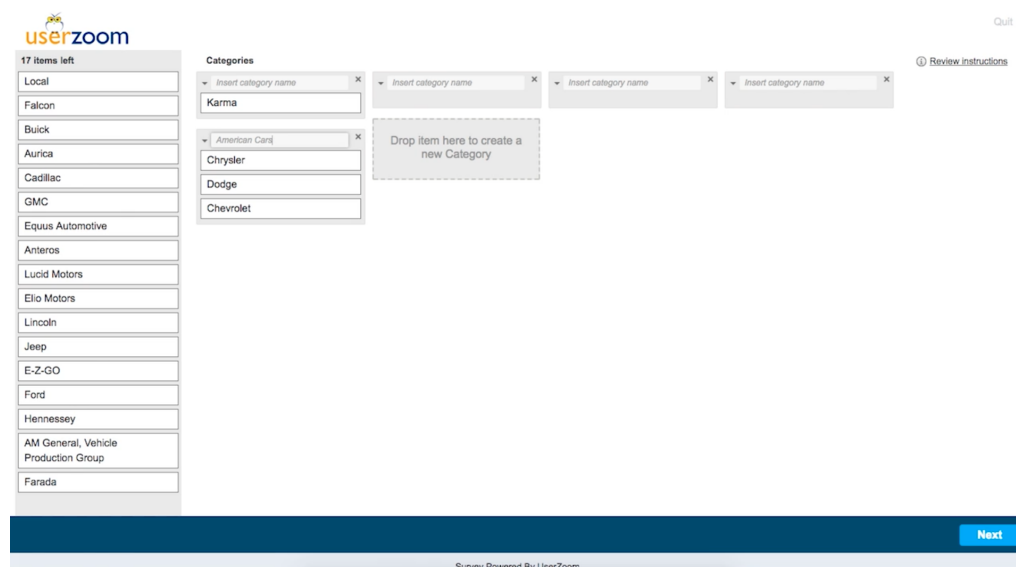
Then you can then see whether or not changing the text of this button has made any difference to the number of people clicking on it.

Card Sorting

(Quantitative / Moderated or Unmoderated)

In a card sort (<https://www.userzoom.com/blog/what-is-card-sorting-and-why-is-it-important-to-your-sites-ux/>), participants are presented with a list of items (for example, all the products featured in an online supermarket) and asked to group them in a way that makes the most logical sense to

them. Depending on the type of card sort, participants can also choose names for the groups they've put together, forming the potential categories and subcategories of a website.



Example from a UserZoom card sort test

There are three types of card sort:

- **Open card sort:** Participants are asked to group cards into categories that makes sense to them, and then they label each category in a way that they feel accurately describes the content.
- **Closed card sort:** Participants sort cards into category groups that you've already labelled and defined. For example, this is handy if you're launching a new page for 'watches' and you're not sure whether to put it under a parent category 'Accessories' or 'Jewellery'.
- **Hybrid card sort:** This is a mixture of open and closed. Participants can sort cards into categories you've already defined and then create their own categories if they think your categories are inaccurate.

While the popular image of conducting card sorting involves post-it notes stuck on whiteboards, it's worth noting that collecting, collating and analysing all those sticky bits of paper can be quite a challenge. Online card sorting removes the sticky notes and all the tedium and manual efforts required to organize them.

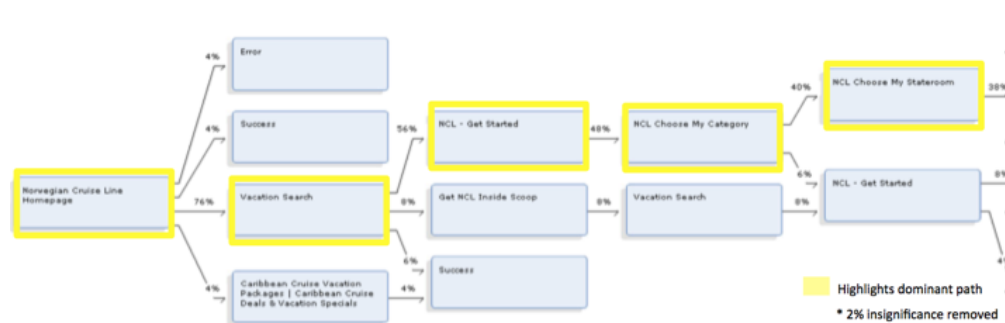
Clickstream Analysis

(Quantitative / Unmoderated)

Clickstreams are a record of the aggregated paths (URLs) followed by participants during their navigation.

Clickstreams allow you to view and analyze the paths participants took while performing their tasks, which percentages followed that path, and their final status (complete, error, abandon or timeout). Certain software even allows you to analyze the heatmaps (the aggregated areas where users clicked on the page) on each page for further behavioral analysis.

Often clickstreams are used to help you evaluate sales funnel and calculate the conversion rate. The clickstream below is from a study done on a Norwegian Cruise Website and shows the dominant path users took to accomplish their task of booking a cruise.



Click Testing

(Quantitative or Qualitative / Moderated or Unmoderated)

Screenshot click tests (<https://www.userzoom.com/blog/what-is-a-click-test-and-why-should-it-be-part-of-your-ux-toolkit/>) are a quick and simple way to test static images to see where users would click. This can be used to validate site design, as well as test wireframe prototypes, by asking participants questions such as, "Where would you click to access specific content." This can be done for everything from high-res images to scanned doodles on a bar napkin.



UserZoom Project Type : Click Test

from UserZoom

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Concept Testing (or Prototype Testing)

(Quantitative or Qualitative / Moderated or Unmoderated)

Concepts or prototypes are inexpensive versions of a design for engineers to test how the real thing will function. For product team members, prototypes facilitate discussion and understanding. UXers can test prototypes with users to get early feedback before sinking resources into a bad design. In the long run, it will save you time, money, and headaches rather than doing all of your UX testing when a product is nearly complete. Or, worse, doing no UX testing at all.

To get the most out of your prototype testing

(<https://www.userzoom.com/blog/what-is-ux-prototyping-and-why-should-you-test-at-this-stage/>), you should remind participants that the prototype is not the finished product, but more like a blueprint. Encourage them to look past any unpolished aspects that might be missing or incomplete.

Concept testing can be done one-on-one or with larger numbers of participants, and either in person or online.

Customer Feedback (or Voice of the Customer Study)

(Quantitative or qualitative / Unmoderated)

A Customer Feedback or VoC study

(<https://www.userzoom.com/blog/uxguide/voice-customer-studies-help-managing-online-customer-feedback/>) is aimed at collecting 'true' data on participants who visit a site. In general, Voice of the Customer studies are really just another way to round out the research you are already conducting by being 'always on' and gathering ongoing feedback for you in the background. This data can be used to segment visitors and create/flush out your user personas.

Conducting this type of study will help you gain true insights to data that you could not otherwise capture in an artificial environment or with artificial task scenarios:

- **You can obtain valuable statistics about who your users are and what they want from your website.**
- **You can find out if visitors leave your site while having accomplished their goals.**
- **You can analyze whether a visitor's online experience was positive, neutral or negative.**
- **You can get the Net Promoter Score and find out if visitors would recommend your site to others.**

Users can be selected through a feedback link, button, form or email. They then visit the relevant website with a clear idea of what they intend to do. Visitors are invited to participate in a short survey as they arrive to the site's homepage or any target page of your choice. Before users actually participate and fill out the survey, they are told to continue doing what they came to do as they normally would on the site. Users spend as little or as long as they wish on the site accomplishing their goal. Only when they are done, they can choose to start the questionnaire.

During the survey participants can be asked a series of qualitative questions aimed at better understanding their experience, such as:

- **What did you come to do?**
- **Can you tell us a bit about yourself?**
- **Did you accomplish your goal?**
- **Were you happy with your experience?**

- How likely are you to recommend the site to others?
- How can we make our site better?

That being said, these tend to be with very large sample sizes and as such can take a lot of bandwidth to go through them all.

Desirability Study

(Quantitative or Qualitative / Moderated or Unmoderated)

Desirability studies help you identify and define some quality of your product or brand. You will show your participants your product (whether it's a prototype, live website or even some marketing copy or images), you then ask them to describe what they see using a list of pre-selected words. With this data you can see what percentage of your respondents consider your product to be "awesome" or your tone of voice to be "weird."

Diary/Camera Study

(Qualitative / Unmoderated)

Diary studies (<https://www.userzoom.com/blog/what-is-a-diary-study-and-why-is-it-useful-for-longitudinal-ux-testing/>) gather information about a user experience over an extended period of time. Participants write about their experiences with a particular product or service in a diary. They may also take photos or perform other activities to record their experiences. Once the study period is over, the researcher analyses the findings.

Diary studies remove the influence of both the researcher and the unnatural out-of-home setting, but they're also useful for understanding long-term behaviour.

According to NN/g (<https://www.nngroup.com/articles/diary-studies/>), these long-term behaviours can include:

- What time of day do users engage with a product?
- How do they share content with others?
- In what capacity do users engage with a product?
- What are their primary tasks?

- What are their workflows for completing longer-term tasks?
- What motivates people to perform specific tasks?
- How learnable is a system?
- How loyal are customers over time?
- How do they perceive a brand after engaging with the corresponding organization?
- What is the typical customer journey and cross-channel user experience as customers interact with your organization using different devices and channels?
- What is the cumulative effect of multiple service touchpoints?

Ethnographic Field Study

(Qualitative / Moderated)

Ethnographic studies (<https://www.userzoom.com/blog/what-is-an-ethnographic-study/>) involve talking with people and observing them perform their tasks in their own natural context. Its aim is not just to gather information on how people behave and interact, but also how their location, environment and other contexts affects their day-to-day lives. UX designers take this ethnographic research and use it to solve a problem through a product or technology.

Eyetracking

(Quantitative / Unmoderated)

Eyetracking (<https://www.userzoom.com/blog/eye-tracking-101-a-user-researchers-guide/>) lets UX researchers see precisely where participants look on a screen when performing tasks. It requires a special piece of equipment that tracks the user's eyes as they look around the screen, and this information generates a heatmap of where on the page the user concentrates the most. This information can help you determine where your most valuable content or CTAs should reside.



Example of a heatmap generated by eyetracking software, courtesy of Usability.gov (<https://www.usability.gov/how-to-and-tools/methods/eye-tracking.html>)

Focus Groups

(Qualitative / Moderated)

A group of participants from your target market are gathered together in one room with a moderator, where they discuss topics around your potential product or service. These thoughts and feelings are collated and used to inform the direction of your product.

Information Architecture Testing

(Quantitative or Qualitative / Moderated or Unmoderated)

Information Architecture (<https://www.userzoom.com/user-research-methods/>) (IA) refers to the way content is presented and accessed from any given page on your website – whether through menus, breadcrumbs, categories, links – whatever takes you from one page to another.

Information architecture testing can help you define navigation, improve information taxonomy and maximize findability across your website. This is usually done through both card sorting and tree testing.

Intercept Surveys

(Quantitative or Qualitative / Unmoderated)

By adding a few lines of JavaScript code to your website or integrating your mobile app with an SDK, you are able to intercept site visitors on your site or app, with an automatically triggered survey. You can find out what your visitors are planning to do on your site, if they are able to achieve what they came for, where they are thinking of going after their visit, who they are in general and if they are satisfied by the experience you provide.



UserZoom Project Type : Intercept

from UserZoom

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Interviews

(Qualitative / Moderated)

Participants meet with a researcher one-on-one to discuss topics around your potential product or service. These thoughts and feelings are collated and used to inform the direction of your product.

Lab Study

(Quantitative or Qualitative / Moderated)

In a traditional lab-based study, between 6-10 (varying according to needs and perspective) are brought into a 'lab' environment to run through a series of tasks. Participants work on a pre-configured computer or mobile device while being observed in a separate room either via monitor or through a one-way mirror. During the study, participants are given tasks and asked to perform them with a researcher sitting next to them or in the other room.

If using a think aloud protocol participants are asked to express their thoughts out loud and the researcher can feel free to probe or ask further questions while the participant is walking through their task and after. Alternatively, participants can walk through their task with no interruptions and questions can be left for probing after the task or after the study in order to gauge time on task.

Participatory Design

(Qualitative / Moderated)

As UXmag states (<https://uxmag.com/articles/participatory-design-in-practice>), Participatory design brings customers into the heart of the design process. Also known as "co-creation", "co-design", or "cooperative design", the end-users of a product, service, or experience take an active role in co-designing solutions for themselves.

Remote Moderated Usability Testing

(Quantitative or Qualitative / Moderated)

When carrying out remote moderated usability testing (<https://www.userzoom.com/blog/what-is-remote-moderated-and-why-should-it-be-part-of-your-ux-research-tool-kit/>), also referred to as online moderated research, you are live online with participants but from your own location, connected to them with screen share technology and an audio bridge.

Other than that it's the same premise as in-person or in-lab testing. The moderator is there to ask participants questions, respond to their questions and feedback, and guide them through the tasks.

The testing software will collect the quantitative and/or qualitative data as participants go through your test. It will also allow you to collect and triangulate different kinds of data and allows for the combination of different kinds of methodologies within a single study. This way you can collect as much data as possible with your participants and make the most out of their and your time.

Remote Unmoderated Usability Testing

(Quantitative or Qualitative / Unmoderated)

Also known as remote panel studies, remote unmoderated usability testing (<https://www.userzoom.com/blog/how-to-design-a-remote-unmoderated-usability-test/>) is a flexible and versatile methodology that caters to various research needs. It is also known for its economy with time and money in comparison to a lab-based study, hence its growth in popularity and increased adoption in recent years.

Remote UX testing will provide statistically valid quantitative data, as well as immediacy to usability issues with video, qualitative, and behavioral data.

This method requires having participants, chosen from a panel of testers who fit into your particular demographic, interact with your prototype, website, app or any other digital product in order to capture their feedback, actions, behaviors and/or spoken-aloud thoughts.

Surveys (or Questionnaires)

(Quantitative or qualitative / Unmoderated)

You can get feedback from users, and collect satisfaction metrics and ratings (<https://www.userzoom.com/blog/what-metrics-do-the-experts-use-to-measure-ux-effectiveness/>), with online surveys. Users can be intercepted directly from your website or app, using advanced survey capabilities such as logic, conditioning and branching, task randomization and advanced screeners (<https://www.userzoom.com/blog/what-are-screeners-and-why-are-they-an-important-first-step-in-building-a-research-study/>) to gather insights.

Typically, surveys are quantitative because you are asking rating scale type questions, and the goal is to get statistically significant sample sizes to ensure your decisions are backed by the numbers. You can, however, get qualitative insights from asking open-ended questions to get information that wouldn't necessarily fit into a typical rating scale.



UserZoom Project Type : Survey

from UserZoom

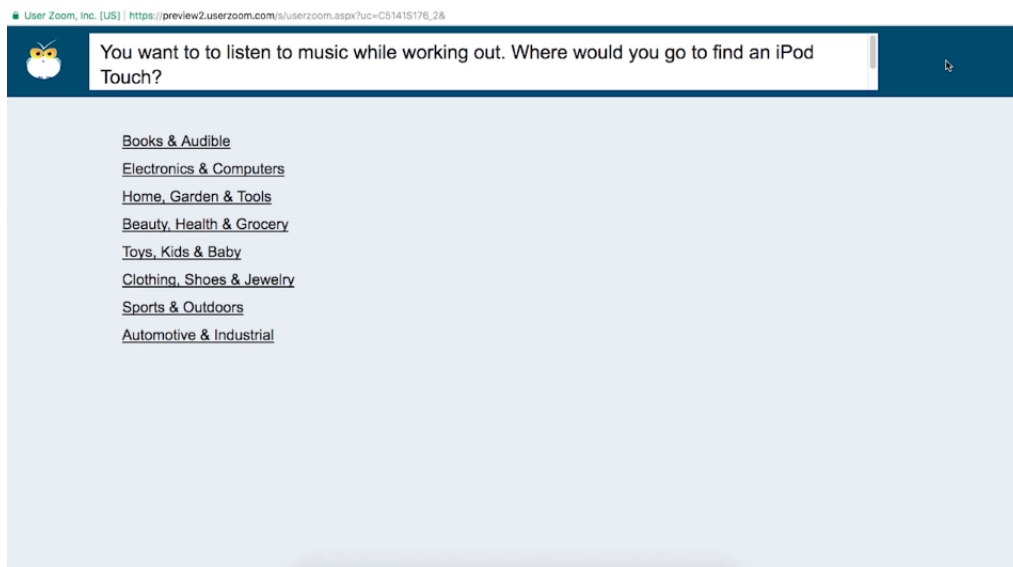
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Tree Testing

(Quantitative / Unmoderated)

Tree testing (<https://www.userzoom.com/blog/what-is-tree-testing-and-why-is-it-important-for-your-sites-ux/>) is typically used to validate the results of a card sort. In tree testing, the main categories and subcategories for a website are already established.

Your participants are asked to explore these categories in order to find a particular item or piece of content. They click through the various links until they find the category where they expect the item to reside.



True-Intent Study

(Quantitative / Unmoderated)

True Intent studies (<https://www.userzoom.com/blog/true-intent-studies-101-a-user-researchers-guide/>) enable you to intercept organic visitors on your website, mobile site or mobile app and ask them what their intentions are for visiting as well as getting actionable information about their experience.

True Intent is a cost-effective research approach for you to obtain a more holistic view of how well your site is doing by asking questions such as: Who is coming to your site? Why are they visiting? Did they get what they needed from the site? How are they using the site? How do they feel about it?

Usability Testing

(Quantitative and/or Qualitative / Unmoderated or moderated)

The bread and butter of user research. This method requires having participants interact with your prototype, website, app or any other digital product in order to capture their feedback, actions, behaviors and/or spoken-aloud thoughts.

Typically this is done on either their own personal devices if remote (see Remote Unmoderated Usability Testing above) or your devices if in-lab.

Observing or analysing this behaviour will give you immediate insight into what works and what doesn't work on your site, allowing you to make improvements and focus on what to iterate next.

UX Benchmarking Study

(Quantitative and qualitative / Unmoderated or moderated)

UX benchmarks (<https://www.userzoom.com/blog/what-is-ux-benchmarking-and-why-is-it-so-valuable/>) allow you to measure your digital products baseline performance and measure how changes are affecting the UX needle over time. Typical benchmark studies are either longitudinal, in which you continually measure your own products over time, or competitive in which you measure your products performance against others.

With benchmarking, you can send your participants off to carry out the same identical tasks on a variety of websites (including your own) in order to determine:

- How your site performs relative to your competitors
- Interpret your usability standing, feature set and more within your industry
- Learn from their success and failures, what works or does not for your competitors
- Industry best-in-class examples to emulate
- Benchmark with other industries

In order to score the sites, you can combine various measurements, collecting both behavioural data (such as task success, task time, page views) and attitudinal data (such as ease of use, trust and appearance).

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UX FOR ALL (https://validately.com/register?utm_source=blog&utm_campaign=cookies_and_cream)

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Christopher Ratcliff — Content Marketing Manager
(<https://www.userzoom.com/blog-author/christopher-ratcliff/>)

Christopher is the Content Marketing Manager, which basically means the skipper of the good ship ‘UserZoom blog’. So far his requests for changing its name to the ‘USS-erzoom Blog’ have been rightfully denied. In his spare time, Christopher is a filmmaker and the editor of wayward pop culture site Methods Unsound. He used to be the deputy editor of

Econsultancy, editor of Search Engine Watch, staff writer for ClickZ and features editor of CMO.com.

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