

ECSE 424 - Human-Computer Interaction

User research during COVID-19

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A little bit about me.

Hi! I'm Dalia.

- Graduated from the Shared Reality Lab in 2014.
- Took this course in 2008, and TA'd it from 2009-2014.
- Appreciate a good excuse to return.



After McGill

- Joined Shopify's Montreal office as the first UX Researcher there in 2014.
- Led the discipline in Montreal.
- Focused on “online stores”.



Today

- On assignment in Shopify's Berlin "office".
- Building out the discipline here.
- Focused on "product sourcing".



**Should we talk about
COVID-19?**

I mean, how can we *not*.

- This is a public health crisis not seen for generations, with widespread humanitarian and economic ramifications.
- Every aspect of our daily lives has changed.
- The way people engage in commerce has changed, impacting everything we do at Shopify.
- This includes user experience research.

Retailers brace for more pandemic trouble

An uneasy economy and relentless disease outbreak are threatening a repeat of the second quarter as the holidays approach.

US Ecommerce Growth Jumps to More than 30%, Accelerating Online Shopping Shift by Nearly 2 Years

Top 10 retailers will grow market share by 5% this year, with Best Buy and Target both expected to surge more than 100%

Article by eMarketer Editors | Oct 12, 2020 | 3 min read

Need to Find a Pandemic Necessity? There's Now a Store for That

Covid-19 Essentials may be the country's first retail chain dedicated solely to products required because of an infectious disease.

UX Research and COVID

All the ways we gather insights

Stage	Question	Qualitative	Quantitative
Idea	What potential problems might we solve?	Existing research, observations, diaries studies, workshops	Surveys, establishing facts, confirm/disprove assumptions
Think	What are the root problems?	Identify segments, interviews, observations, workshops	Quantify segments
Explore	How might we test assumptions and hypotheses?	Lo-fi prototype/mockup testing	Define success metrics, measure baselines
Build	Can people use what we're building?	High-fidelity usability tests, diary studies, beta tests	A/B testing, instrumentation, reporting
Launch	Are people using it in the way we thought they would?	Forums/social media monitoring, feedback forms	Populate reports, monitor success metrics
Tweak	What improvements might be worthwhile?	Analysis of support tickets, retrospective, triangulate previous findings	A/B testing, monitor reports

Activity, Take 1

- You work at a company that's developing an online grocery shopping service.
- With COVID, the need for this service has really ramped up.
- You're trying to learn more about this problem space, and here are some of your research questions:
 - How do people approach grocery shopping? At what cadence do they do it, and how do orders vary from one to the next?
 - How comfortable do people feel about buying their groceries online? What might be the barriers to doing so?
 - What are people's expectations when having online groceries delivered?
- **Your task:** in groups of 3-4, work out how you would go about collecting information and evidence to answer your research questions.



**How did COVID-19
considerations impact your
approach?**

The “user” in user experience research.

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Requires direct input from participants

Requires synchronous, possibly in-person, direct input from participants

Social distancing is a primary consideration.

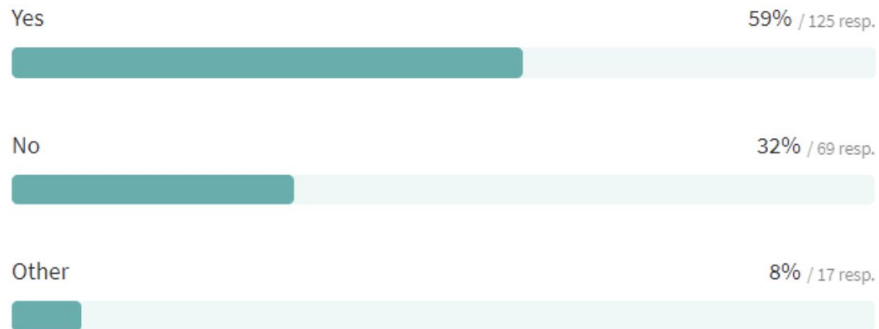
But the simplest adjustment for researchers was actually going remote.

There's plenty of resources on how to do that.

- [Reimagining research during COVID-19 \(by Facebook\)](#)
- [Running amazing user interview sessions](#)
- [3 simple ways to improve your remote user interviews](#)
- [The best video conferencing tools for remote user testing](#)



Is your company accelerating the adoption of better tools for remote collaboration?



What has been the most disruptive aspect of working remotely?



The real question:
**Should you even reach out to
participants when they're going
through a crisis?**



Just like our merchants, we had to adapt quickly.

“We recommend pausing **primary** research studies with merchants, partners and buyers for the next 4 weeks out of respect and empathy.”

How we're pivoting: researching from a distance

Why the research team at Shopify decided to pause conducting primary research



Gene Shannon

Follow

Mar 25 · 10 min read



[How we're pivoting: researching from a distance](#)

**So how *do* you do user research
when you can't talk to your users?**



You get creative.

“Consider this pause on primary research a unique opportunity to flex your research muscles on a few really key alternative activities.”

- Shopify's Research Leadership Team



Just because we're pausing *primary* research, doesn't mean we're pausing *all* research.

- Review past research, data and support insights to highlight connected insights and create broader narratives.
- Return back to raw data from past studies to glean further insights from them.
- Collaborate with researchers beyond your own product area, data science, and support to bring together triangulated insights from multiple sources.
- Access [FullStory](#) and observe users.
- Facilitate sprints/workshops where previous research can help the guide the activities.
- Conduct secondary research (e.g. market/industry research, competitive audits).



But, like it did for our merchants, COVID meant long-term changes for us too.

- With 4-weeks of no primary research, we couldn't just open the floodgates again.
- We needed to proceed with an abundance of caution.
- We needed to adapt.
- So we set 3 principles.



1. Prioritize ruthlessly.

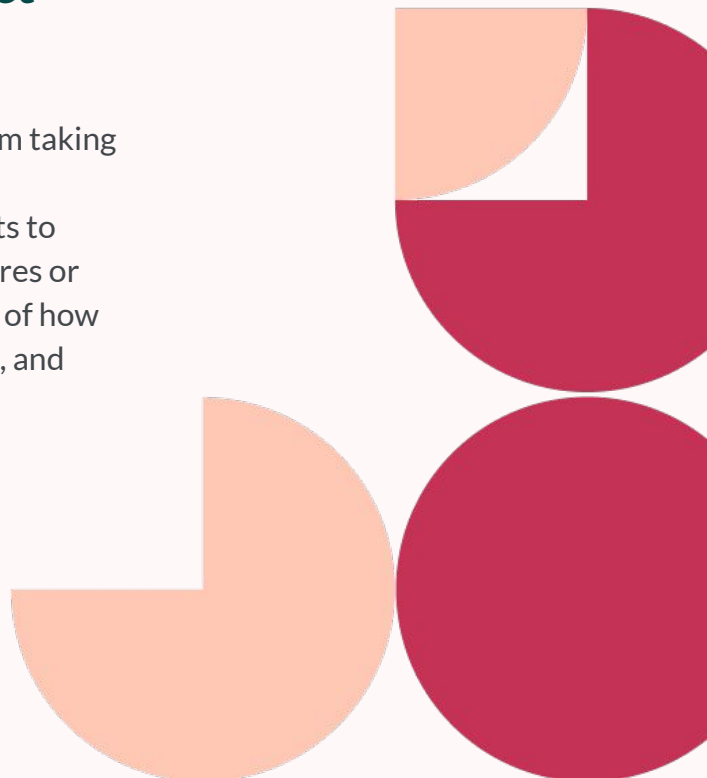
Ask yourself whether the research questions you're considering actually warrant primary research, and, if so, whether answering those questions is indeed a priority for merchants and partners at the moment.



2. Help participants and derive more direct value out of your research.

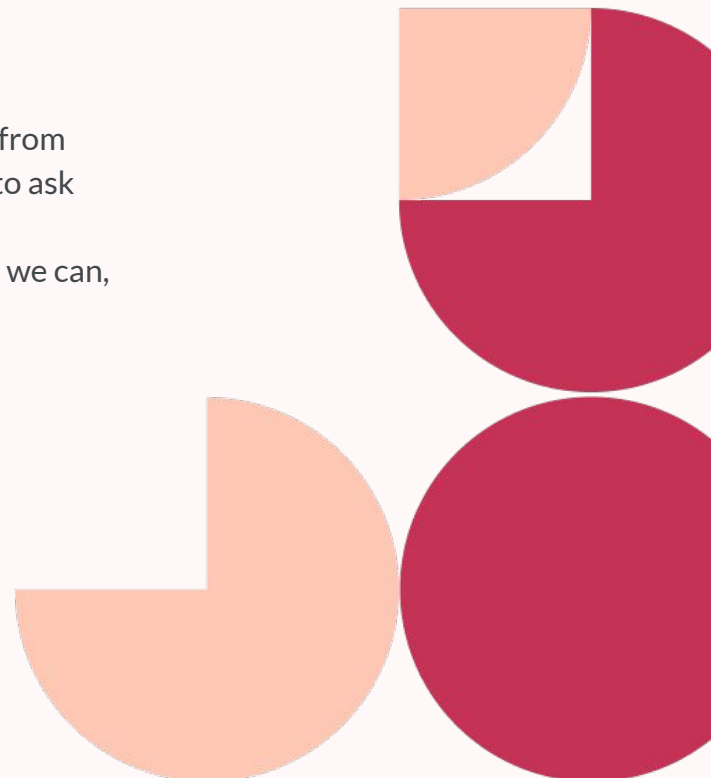
Consider what benefits merchants and partners might derive from taking part in research at Shopify, beyond a monetary “thank you” gift.

Conducting participatory/co-design research, inviting participants to betas or longitudinal studies, or giving them early access to features or research findings (whenever possible, of course) are all examples of how we could be building stronger relationships with our participants, and bringing them more value through our work.



3. Be firm with expectations.

Be clear with your team (and yourself) about what you can learn from merchants and partners at this time, and how. This is not a time to ask them what they think we should be building. Rather, we need to understand the challenges they're experiencing as thoroughly as we can, so that we can in turn do our jobs of solving for those challenges.



**The questions we ask have been
changing too.**

**User research is all about
behaviours, not opinions.**

The behaviours we study are changing...

Before COVID-19

Commuting every day to an office

Exercising in a gym

Socializing in large groups at bars

Buying products in stores

Going out to eat in restaurants

Going to a movie theatre

Going on international vacations

Visiting a doctor's office

Visiting a government office to complete paperwork

After COVID-19

Working from home

Exercising at home or outdoors

Socializing in small groups at home or outdoors, if at all

Buying products online

Ordering food online

Watching movies at home

Going on a local road trip

Using a telehealth app

Completing paperwork online

And so the questions change too.

Category

Questions

Behavioral Shifts

Are users doing different activities than they used to?
Has the frequency of any activities changed?

Psychological Shifts

Are your users' concerns and anxieties different now?
Have their priorities changed?

Changes in User Groups

Have factors like risk tolerance, age, life stage, or living situations created new rifts in user behavior?

Regional Effects

How the local government is responding, and what restrictions are in place?

Temporal Effects

How long will each of these shifts last? Will they end suddenly, fade out gradually, or be permanent?

Activity, Take 2: Knowing what you know now

- You work at a company that's developing an online grocery shopping service.
- With COVID, the need for this service has really ramped up.
- You're trying to learn more about this problem space, and here are some of your research questions:
 - How do people approach grocery shopping, and how might that might change on a weekly basis?
 - How comfortable do people feel about buying their groceries online? What might be the barriers to doing so?
 - What are people's expectations when having online groceries delivered?
 - **How would the pandemic have affected any of these behaviours?**
- **Your task:** in groups of 3-4, work out how you would go about collecting information and evidence to answer your research questions.



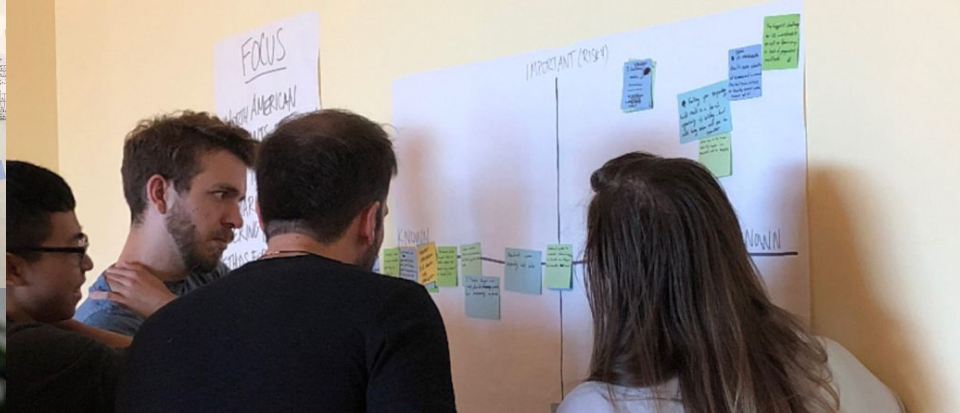
**UX in the age of
Digital by Design.**



Digital by default. Digital by design.

Digital by default represents a digital-first way of thinking, working, and making decisions. It means the freedom to work from anywhere and the opportunity to build solutions that help Shopify's merchants and partners innovate through chaos and emerge, stronger and more adaptable than ever before.

**But UX folks *love* getting
together.**



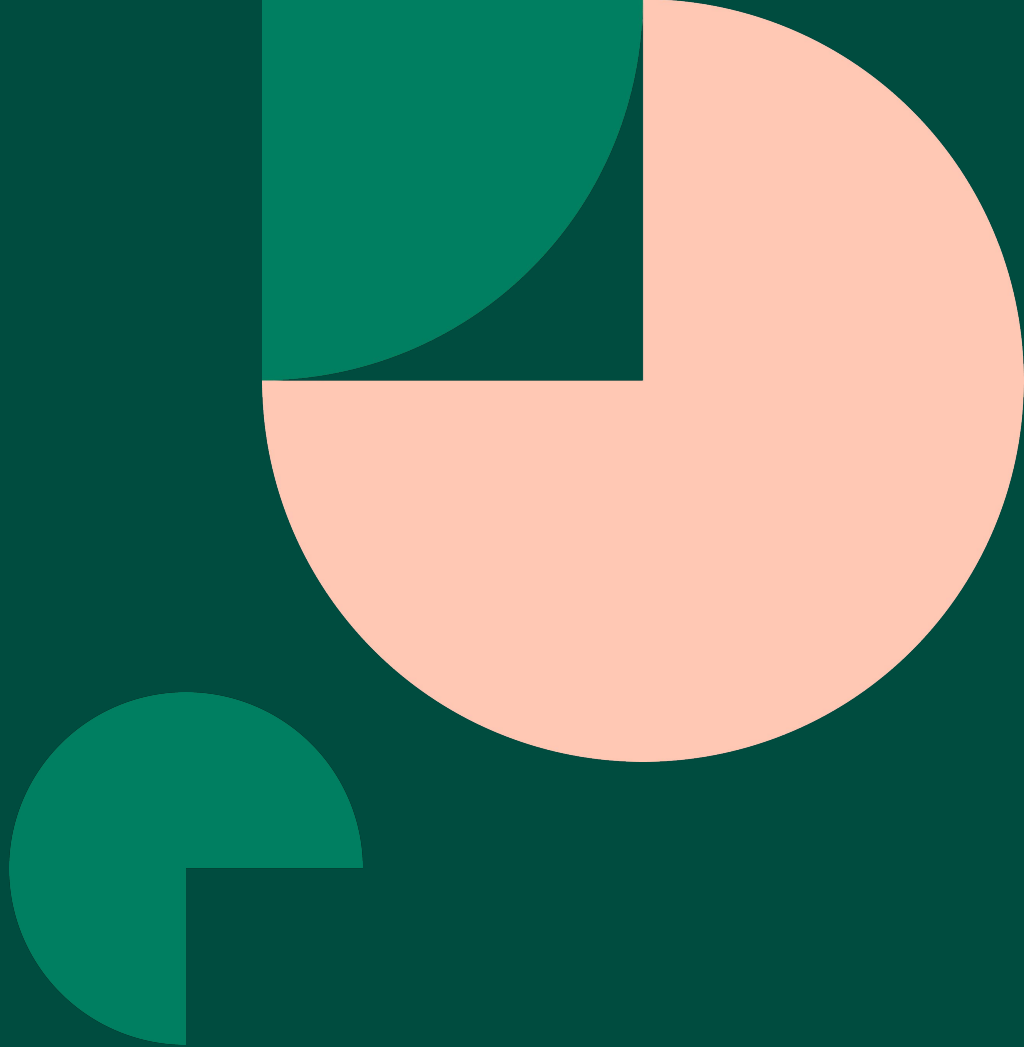
Focus on the relationships, not the tools.

- What are the ways we can bring teams together beyond meetings?
- What are the ways we can build time for human interactions *in* our meetings?
- What are the ways we can make lengthy workshops and collaboration less alienating?
- What are the ways we can inject **fun** into our day?



Thank you!

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Appendix: Shopify and COVID-19

Shopify's mission is to make commerce better for everyone.

- We provide merchants the tools to start, grow, market, and manage a retail business of any size.
- The majority of our merchants are small and medium-sized businesses.
- These businesses play an important role in their communities.



Sources

[The role of entrepreneurship on the economy](#)

[Local entrepreneurship matters for local economic performance](#)

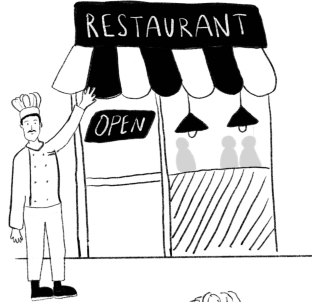
[What the Great Recession can tell us about the COVID-19 small business crisis](#)

[UK COVID impact to small businesses](#)

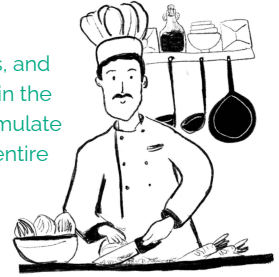
[Small business statistics](#)

Why small and medium business matter

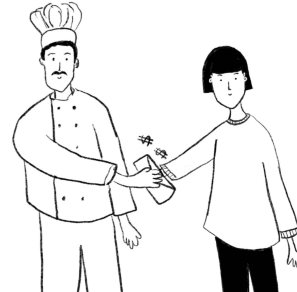
A single SMB has the power to change a family, a town and an entire community. Keeping these businesses afloat has a ripple effect on the economy.



Owners pay taxes to operate their businesses, and those dollars can stay within the local economy, helping stimulate and, in turn, improve their entire community.



Through a focus on personal relationships with customers, they help build a sense of local community.



They are huge drivers of employment, and account for most new jobs created in the US and around the world*.



Employees of SMBs may choose to spend their income in the local economy, thereby contributing to an increase in local consumer spending.

COVID hit these business in many ways

- Physical retail stores had to close.
- Supply chains were disrupted.
- Shipping networks were affected.
- Staff had to be laid off.
- The needs and means of their buyers changed.
- **They've had to contend with extreme uncertainty.**



How Shopify responded.

We had to pivot, fast.

- Get the offline world online, fast.
- Give buyers a trusted place to shop.
- Get stuff from point A to B.



I'm starting to sell online

I'm moving my offline business online

I'm switching to Shopify



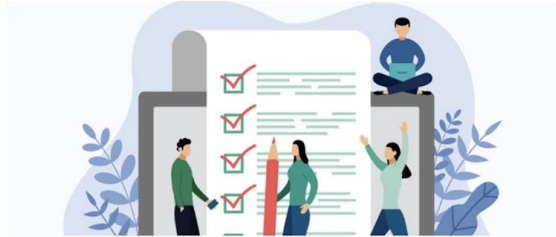
[The Beginner's Guide to Ecommerce Shipping and Fulfillment](#)



[How to Set Up a Shopify Store: A Step-By-Step Guide](#)



[The Business of DIY: 14 Things to Make and Sell Online](#)



[The Essential Shopify Store Launch Checklist](#)



[Ecommerce Business Blueprint: How to Build, Launch, and Grow a Profitable Online Store](#)



[12 Low-Investment Business Ideas You Can Start From a Laptop \(No Inventory Required\)](#)

Shipping

Now needs more flexibility: Getting orders to your customers has never been more critical. Find out how our new tools fulfill customer expectations.



Offer local delivery

Encourage local sales and build strong customer relationships with local delivery.

[Learn more about local delivery →](#)



Local pickup is now available

With local pick up, your customers can skip shipping rates and pick up online orders in-store, curbside, or from other convenient locations that you can add at checkout. Fulfill your pickup orders in your Shopify admin or the mobile app.

[Learn more about local pickup →](#)



Set up Shopify Shipping to print labels at home

Practice physical distancing by printing your shipping labels at home and get access to exclusive postage rates.

[Learn more about Shopify Shipping →](#)

Finance

Now needs more certainty: Access support and resources to help ease your financial burden.



Get the funding you need now

From inventory to marketing campaigns, use Shopify Capital to get quick financial support to make your next move.

[Learn about Shopify Capital →](#)



Cash flow management

Sometimes cash flow is more important than profit. Discover new ways to manage your finances in these times.

[Learn about cash flow →](#)



Short-term revenue strategies for retailers

Advice, resources, and ideas for brick and mortar retailers navigating the changing market.

[Learn about revenue strategies →](#)

Gift Card Support Is Now Available on All Plans to Help Small Businesses

by Gary Chen • [Announcements](#)

Apr 5, 2020 • 2 minute read • [Leave a comment](#)



Express

Free

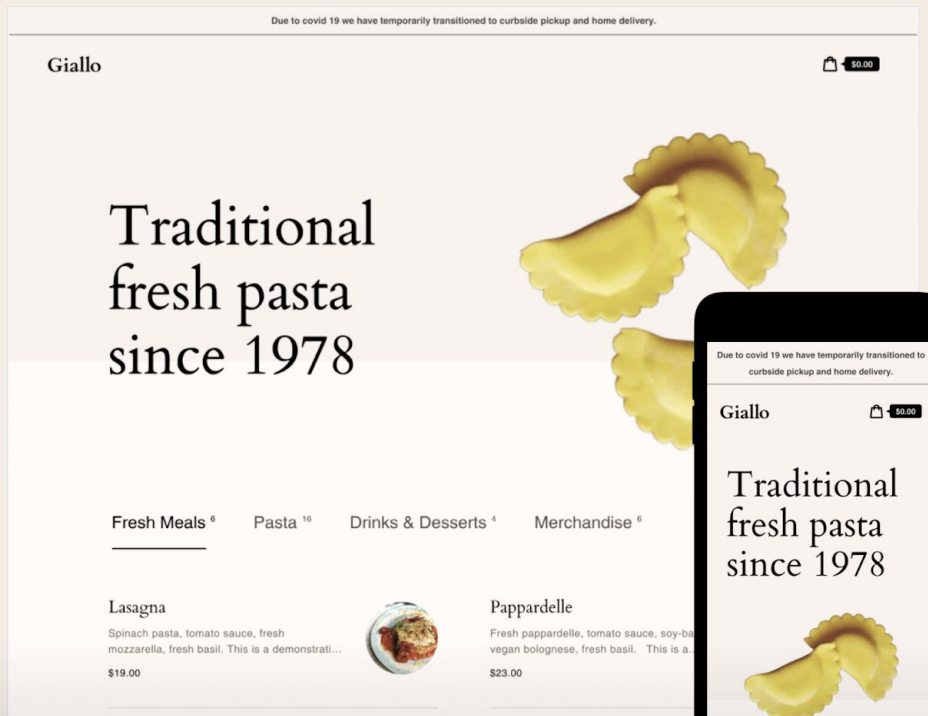
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Start with this theme

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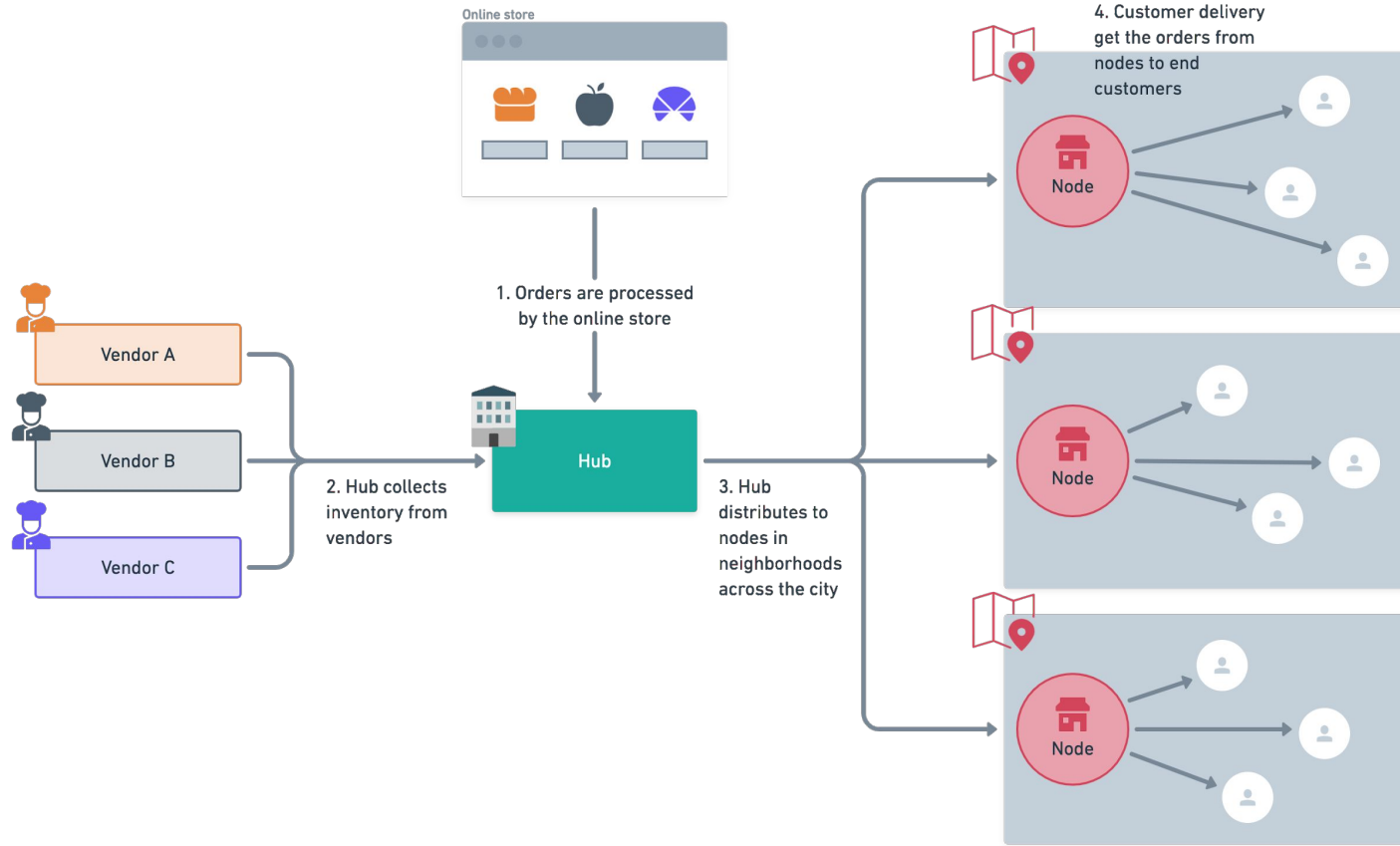


Our merchants adapted too.


Almost overnight

- [Mother cocktail bar](#) pivoted from bar to grocery delivery service capitalizing on their network of restaurant produce and meat suppliers
- [Pyer Moss](#) converted their office to a donation centre for PPE, collected \$10k donations to purchase PPE
- [Haptic Lab](#) launched downloadable DIY kits to accompany their line of quilts
- [Sarah Horowitz Perfumier](#) making hand sanitizer and selling at cost
- [Tasillery](#) turned their whisky and gin operation into hand sanitizer production
- [Nouveau Riche Vintage](#) hosts a livestream selling event with models to demonstrate fit of clothing
- [Logan and Finley](#) rename collections for physical distancing lifestyle and set up office hours to help guide buyers online shopping experiences
- [Province Apothecary](#) offering followers nutritionist lead cooking “classes” via Instagram stories
- **Probably my favourite example:** [Albatross bakery](#) partnered up with other vendors to set up a local delivery network in Berlin





‘Apocalypse Delivery’ went from a Google Form to a complex local delivery system within a week.




“As there are no current alternatives supporting local businesses, we are interested in setting this up.”

“We (Albatross) do NOT want ownership of this platform, we want to participate in creating a long term platform for local businesses to sell their products, survive the crisis and self organise.”

- Apocalypse Delivery






“There is no precedent for this situation,
decisions are being made on an hourly
basis, so this is all for now.”

- Apocalypse Delivery





“The way businesses are adapting is not a temporary measure. It may in fact prove to be the key to their long-term survival, and Shopify has a huge role to play in ensuring that survival.”

- Dalia (April 2020)



6 months later...



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Check it out at <https://archipel.berlin>