



REI genies

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REI Gift Card Usability Testing

FINAL REPORT

HCDE 517 | Usability Studies

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Executive Summary

Purpose: The purpose of our study was to identify usability issues with the online gift card purchasing experience for both physical and e-gift cards. Some of the research questions the test was designed to address are:

- How discoverable is the gift card page?
- How effectively can users complete checkout without assistance?
- How well do users understand the e-gift / first class mail gift card differences and check out process?

Participants: The test included 9 participants who were all online shoppers and recent gift card purchasers. We recruited a mix of genders, ages, and familiarity with REI.com.

Results: Users were given 3 tasks: (1) Navigate to the gift card page (2) purchase an e-gift card (3) purchase a physical gift card. In total, 7 of 9 participants were able to complete all three tasks without assistance. However, the post-task Likert scores for the discoverability and the physical gift card tasks revealed some delay and frustration due to usability issues.

Findings and Recommendations: Our test uncovered three primary usability issues. Below is a brief summary of those issues and our recommendations.

- **Discoverability:** A majority of participants were unable to find the gift card landing page on their first attempt. While 7 of 9 participants looked for a link in the main navigation, only 2 of those participants were able to locate the link. We recommend including a link for the gift card page in the main navigation or somewhere above the fold on the home page.
- **Selecting a gift card design:** A few participants did not realize it was required to select a design when purchasing a physical gift card. One of these participants was unable to recover from this error without assistance. We recommend giving users a better visual clue that they must manually select a design or providing a default selection to avoid this error.
- **“Send as a gift” option:** The “Send as a gift” option that is presented to participants during the physical gift card checkout caused significant confusion for two participants and resulted in lower Likert ratings for the task. Since a gift card is not eligible for this option, we recommend greying it out during checkout if possible.

Study Objective

This usability test was designed to measure the discoverability of the gift card page and assess whether users are able to complete the gift card purchasing process without assistance from customer service. Secondary goals for the research are to learn about user preferences and expectations around gift card purchases for future site improvements.

Our research questions included:

- How efficiently do users find the gift card page?
- How discoverable is the gift card page?
- How effectively can users complete checkout without assistance?
- How satisfied are users with the gift card experience?
- How well do users understand the e-gift / first class mail gift card differences and check out process?

Methods

Our test spanned over 2 days with 4 sessions per day. Participants were scheduled for one-hour sessions in the Lute Lab on the campus of University of Washington. They were given a scenario and 3 separate tasks to complete on REI's website.

Recruitment

A total of 8 participants were recruited using 2 social media and 4 classifieds sites, and screened using an online questionnaire (See Appendix D). All participants were given a \$25 REI gift card at the end of the usability test. One pilot participant who satisfied our recruiting criteria was chosen from family members/friends. We felt that the results were compelling enough to also include in the dataset.

Procedure and Testing Logistics

Testing equipment included a rented lab with a computer running Morae and a display on either side of a divider separating two desks. The moderator and participant were located on one side of the divider and the notetaker watched a mirrored display on the other side. In another room, two observers watched the sessions using Morae Observer and recorded quotes and observations on sticky notes placed on printouts of key screens.

Our test was conducted with the following structure:

- **Online recruiting screener survey** to make sure participants meet our criteria

- **Pre-test questionnaire** to qualify participants and to understand their online shopping and gift card buying behavior
- **3 tasks** to be conducted using Think Aloud Protocol and post-task Likert ratings
- **Post-test questionnaire** that covered feedback on their overall experience

A full testing schedule can be found in Appendix C and a copy of our participant scenario and tasks can be found in Appendix G.

Data Collection and Analysis

During the test, the notetaker and moderator recorded behaviors, observations, and participant answers on a pre-formatted form that can be found in Appendix I. The two team members in the observation room noted important quotes and participant behaviors on Post-It notes and placed them adjacent to printed screenshots of the relevant screen. After the tests we compiled the following data for each participant:

Data	Type	How to collect
Pre-test Questionnaire		
Initial attitude toward REI	Quant; subjective	Net Promoter Score
Task 1: find gift card home page		
Success / failure to find gift card page without assist	Quant; objective	Observation
Path to gift card page	Quant; objective	Observation
Number of errors to reach gift card page	Quant; objective	Observation
Expressed frustrations with finding gift card page	Qual; subjective	Think aloud protocol
Suggestions for improving findability of gift card page	Qual; subjective	Participant comments
Rating for ease of use	Qual; subjective	Likert scale
Understanding of e-gift vs. physical gift card	Qual; subjective	Open question
Task 2: purchase e-gift card		
Success / failure to reach checkout with e-gift card without assistance	Quant; objective	Observation

Number of errors to reach checkout with e-gift card	Quant; objective	Observation
Type of errors made in reaching checkout with e-gift card	Quant; objective	Observation
Expressed frustrations with purchasing e-gift card	Qual; subjective	Think aloud protocol
Suggestions for improving e-gift card purchase experience	Qual; subjective	Participant comments
Rating for ease of use	Qual; subjective	Likert scale
Expectations for delivery of e-gift card	Qual; subjective	Open question
Task 3: purchase physical gift card		
Success / failure to reach checkout with physical card without assistance	Quant; objective	Observation
Number of errors to reach checkout with physical card	Quant; objective	Observation
Type of errors made in reaching checkout with physical card	Quant; objective	Observation
Expressed frustrations with purchasing physical card	Qual; subjective	Think aloud protocol
Suggestions for improving physical gift card purchase experience	Qual; subjective	Participant comments
Rating for ease of use	Qual; subjective	Likert scale
Expectations for delivery of physical card	Qual; subjective	Open question
Post-test Questionnaire		
Rating for ease of use	Qual; subjective	Likert scale
Level of satisfaction	Qual; subjective	Likert scale
Likely to recommend	Qual; subjective	Likert scale
Understanding of difference between email and first class gift card	Qual; subjective	Likert scale
Competitive positive gift card experiences	Qual; subjective	Open question

Participants

Participants were recruited to meet the following criteria:

- Have shopped online in last 6 months
- Have bought at least one gift card within the last 6 months
- Have not bought gift cards from REI's website within the last 12 months
- Mix of familiarity with REI.com
- Mix of ages (between 18-69)
- Mix of genders

Participants' demographic information

Participants	Gender	Age	Frequency of visiting REI.com
P0	Female	30-39	Several times a year
P1	Male	40-49	Once a year or less
P2	Male	60-69	Once a year or less
P3	Female	18-29	Several times a year
P4	Female	30-39	Once a year or less
P5	Female	18-29	Once a year or less
P6	Female	18-29	Once a month
P7	Male	40-49	Once a month
P8	Male	30-39	Once a year or less

Findings and Recommendations

Positive Findings

Our research revealed several positive trends in the gift card purchasing experience. These included:

- The search function of the home page is an effective method for shoppers interested in gift cards. In total, 5 of 9 participants used this method to locate the gift card page. Those participants on average scored the ease of the task as a 4.2 on a 5 point Likert scale, indicating they felt it was easy for them to complete.
- 7 of 9 participants successfully completed all three tasks without assistance. This is a strong indication that the purchase flow is usable for most participants, in line with the business goal of reducing the reliance on customer service support.
- In the post-test questionnaire, participants gave high ratings for the ease of the shopping experience and their satisfaction with the purchasing process (4.1 and 4.0 respectively).
- Participants expressed positive comments about the gift card designs and appreciated the option to customize their gift cards for the intended recipient.

Usability Issues Summary

Issues	Detail	Frequency	Severity ¹	Recommendation
Discoverability	Gift card page required more than one attempt to locate	5/9	3	Include a link to gift card page “above the fold” or in the main navigation
Selecting a gift card design	It is not obvious that users must select a design	3/9	2	Need more visual clues that users must select a design, or provide a default selection
“Send as a gift” option	Confusion around “Send as a gift” option for physical gift cards	3/9	3	Hide or disable “Send as a gift” checkbox for physical gift cards
“Update” option in shopping cart	“Update” link was misunderstood as “Edit Cart”	2/9	3	Provide a more clear association between “Update” and “Quantity”
“Use shipping address” in checkout	Confusion around “Use shipping address” option for e-gift cards	2/9	4	Hide or disable “Use shipping address” checkbox for e-gift cards
Shipping address for physical gift cards	Confusion on whose information to enter (sender’s or recipient’s)	8/9	N/A	Further testing recommended

¹Severity - Dumas and Redish scale

Level 1: Prevents task completion

Level 2: Creates significant delay and frustration

Level 3: Problems have a minor effect on usability

Level 4: Subtle and possible enhancements/suggestions

Primary Usability Issues

Discoverability



A majority of participants unsuccessfully looked for the gift card link in the main site navigation. These participants then resorted to using either the search function or to scrolling to the footer to navigate to the gift card page.

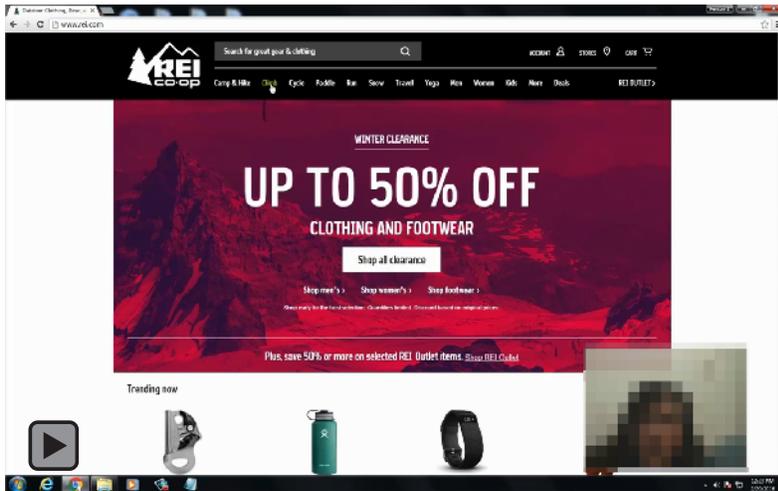
- 7 of 9 participants initially attempted to find a gift card link in the main site Navigation. 5 of those 7 participants failed to locate the gift card link under the “More” tab. Several participants commented that the gift card link was not “obvious” or that they wished the gift card page was discoverable “above the fold” in the main navigation. Our observations indicate that the discoverability issues caused delay and some frustration for these participants.
- 9 of 9 participants were able to successfully navigate to the gift card landing page without a prompt, although 5 of those participants required more than one attempt to locate the page.
- The most common path to the gift card page was through the search function (5 of 9 participants), indicating that search was easy to discover for most of the participants. Participants that used search also scored finding the gift card link as easier (avg. 4.2) than those that used other methods (avg. 2.75).

Recommendation:

Search is working for participants that are actively looking for gift cards. If the goal is to increase the exposure and conversion of users to REI’s gift card products, we recommend making the gift card link visible “above the the fold” and potentially inserting in the main home page navigation. This would be in line with our participants’ most frequently cited positive gift card experience (Amazon.com) that features a “gift card” link in its main navigation (See Appendix J).

Related video and screenshot on next page

- 78DD9 ¥



"I'm just going to click up [in the search box] and type in 'gift card'. Gift cards - tada!" -P2



"I'm guessing it's going to be in the 'more' tab. Gift cards, here it is!" -P6

MEMBER BONUS CARD
VALID MARCH 10-17, 2016

\$20

MEMBERS, EARN A \$20 BONUS CARD
When you spend \$100 or more through March 8

Single-use bonus card redeemable by REI members March 10-17, 2016. Limit one card per member. See terms and conditions.

Not a member? Join and earn your bonus card today. Add membership to cart.

People with similar interests also viewed

- Jones Snowboards Flagship Snowboard - 2015/2016 \$599.00
 - Arbor Westland Snowboard - 2015/2016 \$599.95
 - Hydro Flask Wide-Mouth Vacuum Water Bottle - 32 fl. oz. \$34.95
 - Hydro Flask Wide-Mouth Vacuum Water Bottle - 40 fl. oz. \$36.95
- How are we doing? Give us feedback on this page.

"I don't actually expect to find what I'm looking for by scrolling, except for possibly at the very end. That would be... bad placement." -P1

Selecting a Gift Card Design



Several participants failed to select a design for their gift card on either the e-gift card or physical gift card task. Two of these participants also did not realize that selecting a design was required for submitting a physical gift card order.

- 2 of 9 participants (P1 and P7) failed to select a design for the e-gift card task. These participants were able to submit their order without receiving any error message.
- 2 of 9 participants (P1 and P2) failed to select a design for the physical gift card task and received an error message. While P1 was able to recover, P2 failed to notice the error message and could not proceed without assistance.

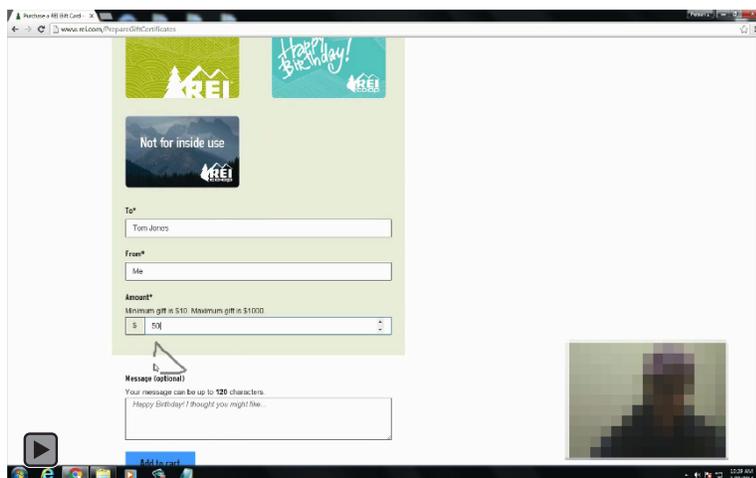
Recommendation:

We recommend providing more obvious visual clues that users must click to select a design, or providing a default selection for the user.

We also suggest making the selection process consistent for both gift card checkout flows (presently a gift card design is required only for the physical card, while the e-gift card makes a default selection for the user if a design is not chosen).

Finally, the error message for not selecting a design should be placed adjacent to the “Select a Design” instruction to be consistent with other error messages in the flow (See Appendix K) and to ensure users are able to notice the message and recover.

Video of P2



Related screenshot on next page



Search for great gear & clothing

Hi, Gabriel | [MY TOOLS](#) | [SIGN IN](#) | [STORES](#) | [CART](#)

[Camp & Hike](#) | [Climb](#) | [Cycle](#) | [Paddle](#) | [Run](#) | [Snow](#) | [Travel](#) | [Yoga](#) | [Men](#) | [Women](#) | [Kids](#) | [More](#) | [Deals](#) | [REI OUTLET](#)

✖ Field name: "" - Please pick a gift card design before continuing.

REI gift card

Choose either email or First-class mail.

- Email
Sent directly to recipient within a few hours.
- First-Class mail
Free delivery within 3-7 days. Expedited shipping may be available at checkout for an additional charge.

Choose a design*



To*

From*

Amount*
Minimum gift is \$10. Maximum gift is \$1000.

Message (optional)
Your message can be up to 120 characters.

[Add to cart](#)

[Need a lot of cards for a group?](#)
[Contact group sales](#)

[Already have a card?](#)
[Check your gift card balance](#)

[Read the gift card terms and conditions.](#)

How are we doing? [Give us feedback](#) on this page.

[1-800-426-4840](#)
Daily, 4am to 11pm PT

[EMAIL US](#)
Then, go outside. We'll take it from there.

[LIVE CHAT](#)
Daily, 5am to 10pm PT

[HELP CENTER](#)
Find answers online anytime.

A participant failed to notice the error message.

"[If] in mousing over the card came to full saturation, I think that would have been even more effective because it would have been interactive."
-P1

“Send as Gift” Option



Several participants selected or commented on the “Send as a gift” option during checkout for Task 3 (physical gift card). The participants that selected the option were delayed in completing their tasks, and two participants were clearly confused by the conflicting information they saw under the gift option.

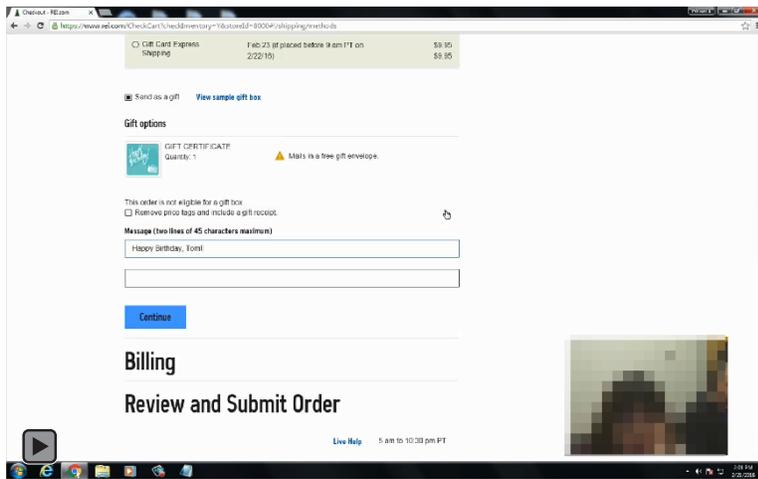
- 3 of 9 participants selected the “Send as a gift” option during the checkout of Task 3. Two of these participants reviewed the “Mails in a gift envelope” and “This order is not eligible for a gift box” messages and decided to uncheck the “Send as a gift option.” The other participant (P5) entered a gift message and submitted the order thinking she had selected the gift box.
- The “Send as a gift” option caused significant delay for two participants and resulted in them giving lower post-task Likert scores (avg. 2.5) compared to the rest of participants (avg. 4). P5 spent two minutes trying to understand the option before commenting “This right here makes no sense to me” and submitting her order. P0 took almost a minute to proceed past the gift option. She viewed the sample box image twice, read the “gift envelope message,” and finally decided the option did not apply.
- 3 of 9 participants commented that the “Send as a gift” option did not make sense when sending a gift card. P1 remarked, “I’m not going to select the ‘send as gift’ only because I just think it’s ridiculous.” P4 selected the option at first before deciding, “I don’t need all this.”

Recommendation:

Because the “Send as a gift” option is not applicable to the physical gift card, we recommend removing or graying out the option during the checkout flow for gift card purchasers to avoid the confusion and delays we observed. Alternatively, we would recommend un hiding the “Mails in a free gift envelope” message so that users can see that warning before selecting the “Send as a gift” option.

Related video and screenshot on next page

Video of P5



Shipping

Shipping address
 FN LN
 1711 E OLIVE WAY
 SEATTLE, WA 98102-5661
 United States
 206555-5555
[Edit](#)

Shipping method

Gift cards

- Gift Card Shipping Mar 11 (if placed before 9 am PT on 3/2/16) FREE
- Gift Card Express Shipping Mar 03 (if placed before 9 am PT on 3/2/16) \$9.95

Send as a gift [View sample gift box](#)

Gift options

GIFT CERTIFICATE
 Quantity: 1 ▲ Mails in a free gift envelope.

This order is not eligible for a gift box.
 Remove price tags and include a gift receipt.

Message (two lines of 45 characters maximum)

Review and Submit Order

[Live Help](#) 5 am to 10:30 pm PT

[More contact options](#) 1-800-426-4840 Call 7 days a week 4 am to 11 pm PT

How are we doing? [Give us feedback on this page.](#)

Welcome to REI | [Log In](#) or [Register](#)

Order summary [Edit](#)

Every-Trail-Connects REI Gift Card
 Quantity: 1
 \$50.00

▲ Restricted shipping options.

Subtotal	\$50.00
Gift card Shipping	FREE
Estimated Sales Tax	\$0.00
Total due	\$50.00

THE REI | 100% SATISFACTION GUARANTEE

"Why would they ask me to remove price tag when it's a gift card?...and include gift receipt...this is the weirdest thing ever. I don't know."
 -P5

"I don't know why there is a 'send as a gift' option because this is a gift card, so it is, in itself, a gift. So I don't know why this option is there... And they're asking me to give an optional message again, which I thought I already input earlier."
 -P5

Secondary Usability Issues

“Update” option in shopping cart



When asked to remove the e-gift card from their cart and replace it with a physical gift card, two participants unsuccessfully attempted to use the “Update” button.

- 2 of 9 participants mistook the “Update” button in the shopping cart as a way to make changes to the gift card options rather than a way to refresh the quantity of items in the cart. Both of those users were significantly confused by the update function and reported not understanding what effect clicking the link had on their order.
- One participant (P5) attempted to click the update link 4 times, reporting “I don’t know what happens really when I update.”

Recommendation:

While not a widespread issue, we believe the confusion might be avoided by more closely tying the “Update” link to the order quantity box. Further testing might be warranted on this function to determine whether users expect to have order editing capabilities directly from the shopping cart.

Related screenshot on next page

Shopping cart (1 item) Subtotal: \$50.00 [Checkout](#)


Every-Trail-Connects REI Gift Card
 To: Gabriel
 From: Kat
 \$50.00

Qty: [Update](#) [Remove](#) Item total: \$50.00

U.S. Standard shipping for this order is Free. [Learn more](#)

Subtotal: \$50.00 [Continue shopping](#) [Checkout](#)

Previously viewed items

Several participants tried to edit their gift card from the 'update' button.

- 

Hydro Flask Standard-Mouth Vacuum Bottle - 24 fl. oz. \$23.95 - \$29.95
- 

REI Nalgene Wide-Mouth Loop-Top Water Bottle - 32 fl. oz. \$10.50
- 

SmartWool Cable II Socks - Women's \$10.93 - \$16.95
- 

Burton Flight Attendant Snowboard - 2015/2016 \$529.95

- Helpful information
- Shipping charges
 - Delivery date finder
 - Ordering help/FAQ
 - Return policy
 - Privacy policy

- Contact us
- Call 1-800-426-4840
 - Email us



How are we doing? [Give us feedback](#) on this page.

"I don't know what that means or does, and I just clicked it and it didn't do anything."
-P7

“Use shipping address” in checkout



Two participants reported confusion surrounding the “Use my shipping address” option when completing checkout for the e-gift card. However, both participants were able to proceed and complete the task successfully.

- 2 of 9 participants reported confusion surrounding the “Use my shipping address” option because the e-gift card checkout flow does not include a shipping address input field. Only one participant (P0) selected the option during checkout. After seeing that her selection resulted in the billing address fields being greyed out, she de-selected the option and proceeded.

Recommendation:

This error has a low severity due to the ease of recovery, as demonstrated by P0. Additionally, this issue is primarily limited to guest users that do not have saved profile address information. However, greying out or removing the “Use my shipping address” option for e-gift card purchases would solve this issue for all users.

Related screenshot on next page



Welcome to REI | [Log In](#) or [Register](#)

Shipping

- E-gift card (to gabriel@gmail.com)
E-gift cards usually arrive in the recipient's inbox within a few hours.

Order summary

[Edit](#)



Happy Birthday REI E-Gift Card
Quantity: 1
\$50.00

Subtotal	\$50.00
Estimated Sales Tax	\$0.00
Total due	\$50.00

THE REI DIFFERENCE | 100% SATISFACTION GUARANTEED

Billing

Use my shipping address

Billing address

First name * M.I. Last name *

Address line 1 *

Street address or PO box, etc.

Address line 2 / Company Name

Apt., suite, unit, building, floor, etc.

City * State / Province *

Postal code * Country *

Phone number *

(555) 555-5555

Email address for order confirmation

Send me exclusive REI promotions and events. See our [Privacy Policy](#).

[Continue](#)

Review and Submit Order

[Live Help](#) 5 am to 10:30 pm PT

[More contact options](#) 1-800-426-4840 Call 7 days a week 4 am to 11 pm PT

How are we doing? [Give us feedback on this page.](#)

“‘Use my shipping address.’ That doesn’t seem applicable for this, because I don’t have a shipping address. That is confusing.”
-P1

Shipping address for physical gift card

The majority of participants reported confusion when submitting the shipping address for their physical gift card purchase for Task 3. However, we believe this confusion was potentially attributable to the test design.

- 8 of 9 participants reported confusion when entering the shipping address for their physical gift card order. While this delayed the checkout process, 7 of those participants were able to proceed without any assistance.
- Participant confusion stemmed from whether they were supposed to enter their own address or the recipient's shipping address. As P7 stated, "I don't remember if I'm supposed to put in where I want this card to be sent to or my information."

Recommendation:

We believe this confusion is due to the order of the task flow in the usability test, since participants entered only their billing address in Task 2, but then had to enter a shipping and a billing address in Task 3. Additionally, participants were using unfamiliar shipping and billing addresses that were provided with the tasks. Further testing would be needed to determine if this issue would occur in a single checkout flow and when participants use their own addresses.

Related screenshot on next page



Welcome to REI | [Log In](#) or [Register](#)

Shipping

Delivery or pickup

Ship to a home or business address

Pick up at a store for FREE

⚠ An item in your cart can only be sent to a home or business address because of a shipping restriction.

First name * M.I. Last name *

Address line 1 *
Street address or PO box, etc.

Address line 2 / Company Name
Apt., suite, unit, building, floor, etc.

City * State / Province *

Postal code * Country *

Phone number *
(555) 555-5555

Use this address for billing

[Continue](#)

Billing

Review and Submit Order

[Live Help](#) 5 am to 10:30 pm PT

[More contact options](#) 1-800-426-4840 Call 7 days a week 4 am to 11 pm PT

How are we doing? [Give us feedback on this page.](#)

Order summary [Edit](#)

Every-Trail-Connects REI Gift Card
Quantity: 1
\$50.00

⚠ Restricted shipping options.

Subtotal	\$50.00
Gift card Shipping	FREE
Estimated Sales Tax	\$0.00
Total due	\$50.00

THE REI DIFFERENCE | 100% SATISFACTION GUARANTEED

"It's a little confusing whether they want my address or [my friend] Tom's. I think his."

-PO

Quantitative Data Summary

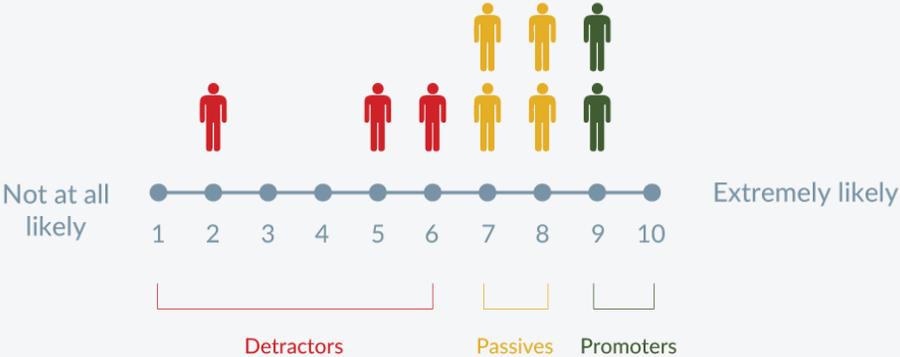
See Appendix G for detailed scenarios and tasks.

PRE-TEST QUESTIONNAIRE

-11

Net Promoter Score² (NPS[®])

How likely it is that participants would recommend REI to a friend



- Promoters:** Loyal enthusiasts who will keep buying and refer others, fueling growth
- Passives:** Satisfied but unenthusiastic customers who are vulnerable to competitive offerings
- Detractors:** Unhappy customers who can damage your brand and impede growth through negative word-of-mouth

²Net Promoter Score = Promoters (%) - Detractors (%)

It can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter).

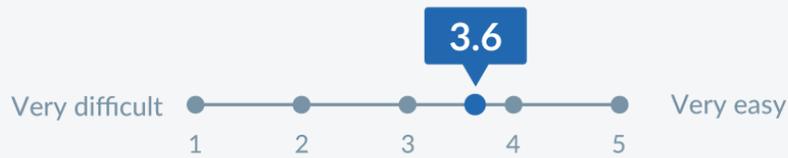
TASK #1

9/9  people reached gift card page without assist

1.3 attempts

Average number of attempts made to arrive at gift card page

Average rate finding the gift card page



TASK #2

9/9  people reached end of checkout without assist

1.2 attempts

Average number of attempts made to reach end of checkout

Average rate buying the e-gift card



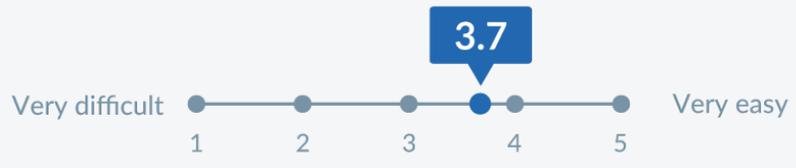
TASK #3

7/9  people reached end of checkout without assist

2.2 
attempts

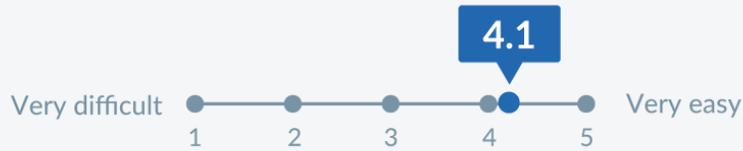
Average number of attempts made to reach end of checkout

Average rate buying the physical gift card

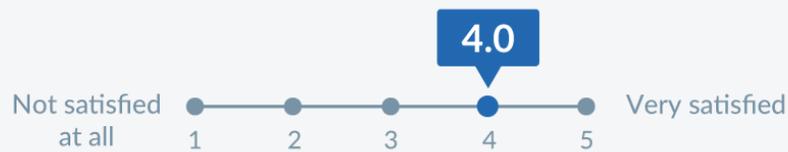


POST-TEST QUESTIONNAIRE

1. Average rate: overall gift card shopping experience



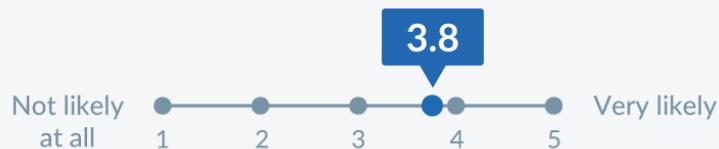
2. Average rate: satisfaction with the purchasing process



3. Average rate: how confident participants understand the difference between the email gift card and the first class mail gift card



4. Average rate: how likely or unlikely participants are to recommend buying an REI gift card online to their friends and family



Next Steps

During our usability sessions, participants raised several issues that we would recommend REI consider for further testing:

- There is no new account sign-up link on the member/guest sign in page during checkout. Would adding a sign-up button add value to the business by encouraging shoppers to become members?
- On the gift card landing page, there is detailed text but no visual clues about what type of gift cards that are available. Would adding photos or icons of e-gift and physical gift card help users purchase gift cards with more confidence?
- Several participants wanted to edit their gift card through the “update” button in the cart. Would allowing users to edit product details in the cart increase conversion?
- Eight of our participants were confused about which shipping information to enter when purchasing a physical gift card. We suspect that is due to having recently completed the e-gift checkout in Task 2 that did not require a shipping address. It may also be a result of using unfamiliar addresses given to participants as part of the task. Counterbalancing the tasks in future testing and allowing participants to use their own shipping address would allow us to better understand the source of this confusion.
- Our observations suggest that older participants (40+) may have more difficulty with the gift card purchasing process. We recommend further testing with this age group to explore this issue.

Appendix

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APPENDIX A: Quantitative Data (Raw)

Participant	Task 1		Task 2		Task 3			Post-Q				
	Pre-Q How likely is it that you would recommend REI to a friend?	Reach gift card page without assist	Number of attempts made to reach end of checkout	Reach end without assist	How would you rate buying the e-gift card?	Number of attempts made to reach end of checkout	Reach end of checkout without assist	How would you rate purchasing the physical gift card?	Please rate your overall gift card shopping experience	Please rate how satisfied you are with the purchasing process	Please rate how confident you understand the difference between the email gift card and the first class mail gift card	Please rate how likely or unlikely you are to recommend buying an REI gift card online to your friends and family
P0	7	1 Success	2	1 Success	4	1 Success	3	3	4	4	4	4
P1	9	1 Success	2	2 Success	4	2 Success	2 Success	5	3	4	4	4
P2	5	2 Success	4	1 Success	3	3 Prompt	3	3	4	3	5	4
P3	7	1 Success	4	1 Success	5	2 Success	4	4	5	4	5	3
P4	6	2 Success	2	1 Success	5	2 Success	5	5	3	3	5	5
P5	9	1 Success	5	1 Success	5	3 Success	2	2	3	3	5	3
P6	8	1 Success	3	2 Success	4	2 Success	4	4	4	5	5	5
P7	8	2 Success	5	1 Success	4	4 Prompt	3	3	4	5	5	3
P8	2	1 Prompt	5	1 Success	4	1 Success	4	4	5	5	5	3
Avg.	1.33333333		1.22222222		4.22222222	2.22222222		3.66666666	4.11111111		4	3.77777778
NPS®	-11											
Success rate		8/9 (88.9%)		9/9 (100%)			7/9 (77.8%)					

APPENDIX C: Testing Schedule

Feb 20			
Time	Participant	Moderator	Notetaker
8:30	Pilot/Video shoot with P0 (photographer - Dorothy)	Kat	Paul
9:30	P1	Kat	Paul
10:30	P2	Dorothy	Tomo
11:30	P3	Paul	Kat
12:30	P4	Tomo	Dorothy

Feb 21			
Time	Participant	Moderator	Notetaker
12:30	P5	Dorothy	Kat
1:30	P6	Paul	Tomo
2:30	P7	Kat	Dorothy
3:30	P8	Tomo	Paul

APPENDIX D: Screening Questionnaire

We are a research team at the University of Washington, and are looking to gather some feedback on people's shopping experiences. Your response to this brief survey would be greatly appreciated. It should only take a few minutes of your time. Thank you for being a part of our study!

1. Have you made a purchase online in the past 6 months?

- Yes
- No
(If No, unqualified)
(If Yes, go to Q2)

2. Have you purchased any gift cards in the past 6 months?

- Yes
- No
(If No, unqualified)
(If Yes, go to Q3)

3. In the past 12 months, which online stores did you purchase your gift cards from?

Please select all that apply.

- Amazon.com
- Dickssportinggoods.com
- Starbucks.com
- Homedepot.com
- Rei.com
- Target.com
- Other: _____
(If REI, unqualified)

4. How often do you visit these store websites?

	Once a year or less	Several times a year	Once a month	Once a week	2+ times a week
Amazon.com	<input type="radio"/>				
Dickssportinggoods.com	<input type="radio"/>				
Starbucks.com	<input type="radio"/>				
Homedepot.com	<input type="radio"/>				
Rei.com	<input type="radio"/>				
Target.com	<input type="radio"/>				

5. Are you interested in participating in our study? The study will be conducted in a technology lab at the University of Washington Seattle campus, and it will take about 45 minutes to complete. As a thank you, you will receive a \$25 gift card for your time.

- Yes
- No
(If No, unqualified)
(If Yes, go to Q6)

6. **Your Availability**

Select days that you are available for participating in the study. (Select all that apply.)

- Feb 20, 9:30-10:30am
- Feb 20, 10:30-11:30am
- Feb 20, 11:30am-12:30pm
- Feb 20, 12:30-1:30pm
- Feb 20, 1:30-2:30pm
- Feb 21, 12:30-1:30pm
- Feb 21, 1:30-2:30pm
- Feb 21, 2:30-3:30pm
- Feb 21, 3:30-4:30pm
- None of the above works for me

Your Contact Information

Name: _____ Email: _____ Phone: _____

7. **Tell us about yourself a little more.**

Gender

- Male
- Female
- Other: _____

Age

- Under 18 years old
- 18 - 29 years old
- 30 - 39 years old
- 40 - 49 years old
- 50 - 59 years old
- 60 - 69 years old
- 70 years or older

Thank you so much for your time and interest! Your response has been recorded. We will contact you if you are a good match for our study.

APPENDIX E: Consent Form

Thank you for participating in our usability study on online shopping. We will be recording today's session to allow our team to observe and benefit from your comments.

Please read the statements below and sign where indicated.

I agree to participate in the usability study conducted by the students of the University of Washington.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

I understand that the study and participants may be recorded and I grant permission to use the recordings for the purpose of the study and presentations.

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date: _____

Please print your name:

Please sign your name: _____

Thank you!
We appreciate your participation.

Gift card #: _____

Signature: _____

Date: _____

APPENDIX F: REI Non-Disclosure Agreement

REI, Inc. Research Project Participation Form

Thank you for deciding to volunteer in for a REI, Inc. research project. The research project will consist of one or more activities and/or sessions to learn about your interaction with technology, products, or services provided by REI, Inc. Please note that you have no obligation to participate and you may decide to terminate your participation at any time.

Materials and Feedback

We ask for your permission to record, document, or transcribe your research session in any format and media (“materials”). You may also provide suggestions, comments or other feedback (“feedback”) to REI, Inc. with respect to the research project. Feedback is entirely voluntary. REI, Inc. shall be free to use, disclose, reproduce, license, or otherwise distribute, and exploit the Feedback and Materials. REI, Inc. shall own all information, software, documentation, and any materials in connections with the research project.

Confidentiality

The research project is confidential and you agree to : (a) never disclose it to anyone else (unless a court or government orders you to); and (b) keep it secret as you would your own confidential information. REI, Inc. does not consider all information about the research project to be confidential. If you legally received information from someone other than REI, Inc., and that person was entitled to share the information with you and did not obligate you to keep it a secret, you do not need to keep that information secret. The same holds true for information REI, Inc. disclosed to you or someone else without obligation to keep it secret or information that you develop independently.

Your Authority to Participate

You represent that you have the full right and authority to sign this form, and if you are a minor that you have the consent (as indicated below) of your legal guardian to sign and acknowledge this form, and you will not disclose to REI, Inc. any non-public information, whether yours or a third party’s without notifying REI, Inc. in advance. In addition, you agree to release REI, Inc. and its affiliates, and clients from any and all claims that you may have now or in the future related to your participation in the research project.

Please confirm your acceptance by signing the bottom of this form. On behalf of REI, Inc., we thank you for your contribution and look forward to your research session.

Signature

Date

Name (print)

Address

City / State / Zip

APPENDIX G: Scenario

Your friend is an outdoor enthusiast who often shops at REI. Their birthday is coming up soon, and you want to get them a gift card for their birthday.

Task 1

Now that you are on the REI's website, please show how you would buy your friend's birthday gift.

Task 2

You decide that a \$50 e-gift card will be suitable for your friend. Please buy them an e-gift card. Here is your friend's information and your payment information:

<i>Friend's Name:</i>	Tom Jones
<i>Email:</i>	tjones@me.com
<i>Phone:</i>	(206) 555-5555
<i>Address:</i>	123 Front St. Seattle, WA 98102
<i>Your Billing Address:</i>	555 12th Ave, Seattle, WA 98102
<i>Phone:</i>	(206) 444-4444
<i>Credit Card Number:</i>	4012 8888 8888 1881
<i>Credit Card Expiration:</i>	12/2018
<i>CCV:</i>	315

Task 3

You have changed your mind. You decide it would be better to buy your friend a physical gift card from the website, instead of an e-gift card. Please remove the e-gift card from your cart, and instead buy them a physical gift card.

Here is your friend's information and your payment information:

<i>Friend's Name:</i>	Tom Jones
<i>Email:</i>	tjones@me.com
<i>Phone:</i>	(206) 555-5555
<i>Address:</i>	123 Front St. Seattle, WA 98102
<i>Your Billing Address:</i>	555 12th Ave, Seattle, WA 98102
<i>Phone:</i>	(206) 444-4444
<i>Credit Card Number:</i>	4012 8888 8888 1881
<i>Credit Card Expiration:</i>	12/2018
<i>CCV:</i>	315

APPENDIX H: Post-test Questionnaire

1. Please rate your overall gift card shopping experience.

Very difficult 1 2 3 4 5 Very easy

2. Please rate how satisfied you are with the purchasing process.

Not satisfied at all 1 2 3 4 5 Very satisfied

3. Please rate how confident you feel that you understand the difference between the e-gift card and the first class mail gift card.

Not at all confident 1 2 3 4 5 Very confident

4. Please rate how likely or unlikely are you to recommend buying an REI gift card online to your friends and family

Not likely at all 1 2 3 4 5 Very likely

5. Have you experienced any great gift card buying experiences from other companies? If yes, which ones and why?

APPENDIX I: Scripts/Note taking sheets

Date: _____
Time: _____
Participant: _____
Moderator: _____
Notetaker: _____

[CLEAR BROWSER CACHE]

[OPEN http://www.rei.com/gift-card.html?QA_UX]

Preamble

[Greet participant and offer bottle of water before getting started]

Thank you for agreeing to take part in our research study. My name is _____(moderator) and this is _____(notetaker). I will be walking you through the study and _____(notetaker) will be observing and taking notes. We will also be recording the session for research purposes only to ensure our notes are accurate.

First we are going to ask you to sign a consent form and a non-disclosure agreement. Please take however long you need to read the form and sign that you agree to the terms.

[Receive signed form]

**Note: Let participant know that the recording will start.*

[START MORAE RECORDING]

During the rest of this session we are going to follow a script to ensure that the instructions are the same for everyone who participates in the study.

I'm here to learn about your experience with REI's website.

During the session I will ask you to do a variety of tasks on the website and will observe you while you complete them. As you go through the study, please try to do whatever you would normally do in that situation.

Please try to think out loud while you are working. Just tell me whatever is going through your mind. This will help us to understand your thought process as you go through the tasks. Please know that we are not testing you, we are testing the website, and there is no such thing as a wrong answer.

I also want to let you know that we are independent researchers who did not design the site you are about to try out. So please be honest in your feedback -- I need to know exactly what you think, not what you think I may want to hear.

The whole session will last approximately 40 min. Do you have any questions before we begin?

[Answer questions]

Our objective today is to observe you making specific purchases on REI's website. In the session we'll give you a typical task to complete to help us learn how the website is working for people like you. Again, please know that we are testing the website, not testing you, so there are no wrong answers.

Here is how the session will work. I will hand you a piece of paper with a task written on it. Please read the task aloud. You can then begin working on the task.

When you feel you have completed the task, say "I am finished." After each task we may ask you a couple of questions related to that task. After that I will hand you the next task and we will repeat the process.

At the end of the session, we'll have you answer a short questionnaire about your experience.

Do you have any questions before we begin?

[Answer questions]

Pre-test Questionnaire

- I see from the survey you took that you shop online. Can you tell me more about where you shop online?
- You mentioned that you buy gift cards. Can you tell me about where you buy gift cards and why?
- How many times have you shopped at an REI store in the past 12 months?
- How many times have you shopped on the REI website in the past 12 months? When was the last time you visited the REI website?
- How likely is it that you would recommend REI to a friend on a scale of 1 to 10, with 1 being not at all likely and 10 being extremely likely?

Not at all likely 1 2 3 4 5 6 7 8 9 10 Extremely likely

Why?

Scenario

MODERATOR: “Your friend is an outdoor enthusiast who often shops at REI. Their birthday is coming up soon, and you want to get them a gift card for their birthday.”

[Hand task sheet to participant]

Task 1

MODERATOR: “Please read the first task out loud.”

“Now that you are on the REI’s website, please show how you would buy your friend’s birthday gift.”

[Stop user at radio buttons screen]

Observation

Path taken

- Navigation > more > gift cards
- Search
- Footer
- Other (describe):

Get to radio button page

- Select “Send a Gift Card”

Attempts participant made to arrive at gift card page (circle one):

1 2 3 4 5 Other: _____

Reach gift card page without assist (circle one):

Success Prompt Fail

Think out loud protocol

Observations:

Suggestions:

MODERATOR: "How would you rate finding the gift card page on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?"

Question

How would you rate finding the gift card page on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?

Very Difficult 1 2 3 4 5 Very Easy

Why:

MODERATOR: "On this screen you can see two options for gifts cards. What are the differences between the two options?"

If needed, follow up with (What do you think "email" means? What do you think "first-class mail" means?)

Question

What are the difference between the two options?

Email:

First class mail:

Task 2

MODERATOR: "Please read the next task out loud."

"You decide that a \$50 e-gift card will be suitable for your friend. Please buy them an e-gift card. Here is your friend's information and your payment information."

[Stop at submit order!]

Observation

Task steps:

- Select radio button for email gift card
- Choose a design
- Enter e-gift card "To:", "From:", "Amount", and email addresses
- Add to cart
- Review shopping cart and proceed to checkout
- Continue as guest
- Enter Billing info
- Enter Payment info
- Continue to Final Order Review page
- Review final order

Number of attempts made to reach check out (circle one):

1 2 3 4 5 Other: _____

Types of errors:

Reach check out without assist (circle one):

Success Prompt Fail

Think out loud protocol

Observations:

Suggestions:

MODERATOR: What do you think happens when you hit submit order? *If needed follow up with (What do you think happens with the gift card?)*

Question

What do you think happens when you hit submit order? What do you think happens with the gift card?

MODERATOR: “How would you rate buying the e-gift card on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?”

Question

How would you rate buying the e-gift card on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?

Very Difficult 1 2 3 4 5 Very Easy

Why:

Task 3

MODERATOR: “Please read the next task out loud.”

“You have changed your mind. You decide it would be better to buy your friend a physical gift card from the website, instead of an e-gift card.

Please remove the e-gift card from your cart, and instead buy them a physical gift card.

Here is your friend's information and your payment information:"
[Stop at submit order!]

Observation

Path taken to gift card page:

- Navigation > more > gift cards
- Search
- Footer
- Other (describe):

Task steps:

- Remove e-gift card, navigate back to gift card landing page
- Select the first class mail gift card option
- Choose a design
- Enter "To:", "From:", and "Amount"
- Add to cart
- Review shopping cart and proceed to checkout
- Continue as guest
- Enter Shipping info
- Enter payment info
- Continue to Final Order Review page
- Review final order

Number of attempts made to reach check out (circle one, note type of error):

1 2 3 4 5 Other:_____

Describe any errors:

Reach check out without assist (circle one):

Success Prompt Fail

Think out loud protocol

Observations:

Suggestions:

MODERATOR: "What are your expectations for what would happen next when you hit submit order? What do you think happens with the gift card?"

Question

What are your expectations for what would happen next when you hit submit order? What do you think happens with the gift card?

MODERATOR: "How would you rate purchasing a physical gift card on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?"

Question

How would you rate purchasing the physical gift card on a scale of 1 to 5, with 1 being very difficult and 5 being very easy?

Very Difficult 1 2 3 4 5 Very Easy

Why:

Post-test Questionnaire

MODERATOR: "Thank you. You have completed all of the tasks. We will now proceed to the final questionnaire."

[Hand questionnaire to participant]

1. Please rate your overall gift card shopping experience, with 1 being very difficult and 5 being very easy. Why?
2. Please rate how satisfied you are with the purchasing process, with 1 being not satisfied at all and 5 being very satisfied. Why?
3. Please rate how confident you feel that you understand the difference between the e-gift card and the first class mail gift card, with 1 being not at all confident and 5 being very confident. Why?
4. Please rate how likely or unlikely are you to recommend buying an REI gift card online to your friends and family, with 1 being not likely at all and 5 being very likely. Why?
5. Have you experienced any great gift card buying experiences from other companies? If yes, which ones and why?

Yes Companies: _____

No

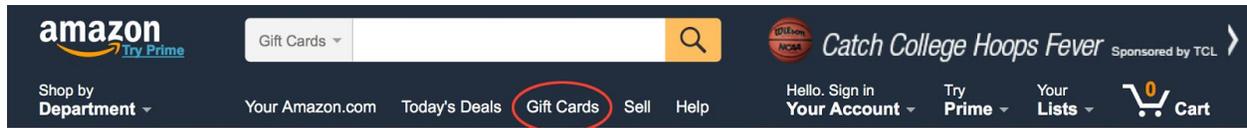
Why:

Closing

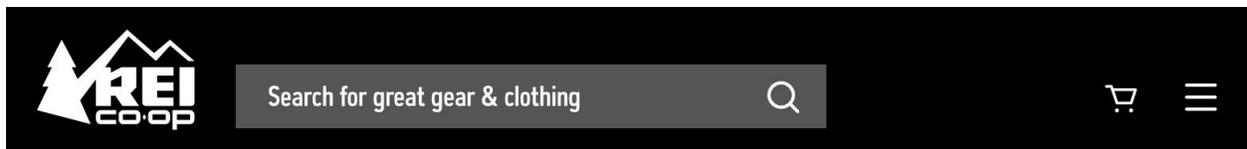
MODERATOR: "This session is now over. Thank you so much for participating in our study. Here is your \$25 REI gift card. Please sign here to confirm you have received the gift card for your participation."

[GIVE GIFT CARD AND OBTAIN RECEIPT SIGNATURE]

APPENDIX J: Amazon.com Primary Navigation



APPENDIX K: Error Messages



REI gift card

Choose either email or First-class mail.

Email

Sent directly to recipient within a few hours.

First-Class mail

Free delivery within 3-7 days. Expedited shipping may be available at checkout for an additional charge.

Choose a design*





To*

✘ This field is required

From*

✘ This field is required

Amount*

Minimum gift is \$10. Maximum gift is \$1000.

✘ This is an invalid amount