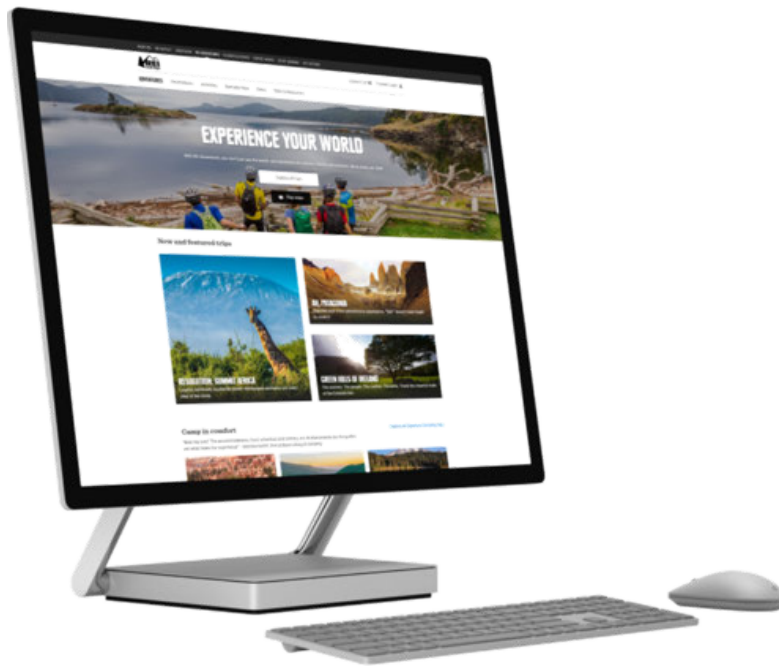


# REI Adventures Booking Feature

## Usability Study Report



4.3.19

Prepared by Happy Campers for REI & HCDE 517 Course  
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# Executive Summary

## Background

For 25+ years, REI Adventures has been helping travelers search for and book all-inclusive experiences all over the world. Growing the 'Experiences' area of business sets REI apart from other gear retailers as a key competitive differentiator. Traveler reviews describe the experience facilitated by REI Adventures as something that has always been on their bucket list. Our team focused on the desktop booking flow to ensure the entire process contributes to the experience of a lifetime.

## Purpose

The goal of our usability study was to evaluate the existing desktop booking flow and identify actionable feedback to optimize user experience and increase rate of successful purchases on REI Adventures site.

Some research questions we explored:

- How easy or difficult it is for users to find the travel dates for a trip they are looking for?
- How easy is it to edit previously entered booking information?
- What obstacles do users encounter while completing the booking process?

## Participants

We developed screening criteria based on the Hardcore Harper and Softcore Sam REI core user profiles and leveraged our personal networks to recruit participants and conduct usability tests. Our participants were recruited to match a majority of the requirements to ensure a healthy variety within the profile pool for both current prospective and aspirational users.

## The Study

Participants were asked to complete the following three scenarios, which each included a series of tasks, to progress through the booking flow:

1. Finding an REI Adventure, navigating through itinerary, and selecting an available date;
2. Successfully entering traveler information, specifying rooming situation, and selecting payment options; and
3. Successfully entering payment information, modifying details, and canceling the booking process. We used a combination of post-scenario Likert scores, observation, and "think aloud" protocol for recording qualitative and quantitative data.

## Key Findings and Recommendations

We analyzed issues identified in our tests using the following severity rating scale:

		Proportion of users who experience problem	
		<i>Few</i>	<i>Many</i>
Impact of the problem on users who experience it	<i>Small</i>	1 - Irritant/Cosmetic	2 - Minor issue
	<i>Large</i>	3 - Moderate issue	4 - Severe issue

Our tests uncovered the below two primary usability issues with highest severity, that we recommend prioritizing:

Usability Issue	Prevalence	Recommendation
<b>No way to edit booking information:</b> Participants found that they needed to reenter all traveler information to modify booking and expressed frustration that data did not persist.	8/8 Participants;	Persist information between pages on navigation and consider adding a “modify” or “edit” button to allow users to move back/forth without fear data loss.
<b>Confusion caused by roommate selection.</b> Participants were confused/not confident about how to fill out roommate selection and were unclear about selecting number of beds.	8/8 Participants;	Lead with selection of number of rooms/beds instead of traveler names, or provide the ability to create profiles to select roommates versus entering names. Also consider reducing the amount of information collected at this stage.

# Study Overview

For more than 25 years, REI Adventures has organizing and facilitating all-inclusive travel experiences all over the world. The fact that REI offers Adventures and other outdoor Experiences in addition to its existing strong gear customer and co-cop membership base is a key competitive differentiator against other outdoor retailers. REI is investing in and expanding their current “Experiences” pillar of business to build on their existing brand recognition, optimize user experience, and add to their offerings in this area. To support these goals, we conducted a usability study assessment of the booking flow for the [REI Adventures desktop website](#).

## Objectives

- Assess the overall effectiveness and usability of the booking flow for REI Adventures
- Identify any roadblocks users may encounter when completing common booking tasks
- Evaluate design inconsistencies and usability issues in the user interface and site content
- Replicate environments and scenarios where representative users might typically plan/purchase travel

## Research Questions

1. How easy or difficult it is for users to find the travel dates for a trip they are looking for?
2. Do the users notice the adventure information in the navigation bar?
3. How easy is it to edit previously entered booking information?
4. What do users do if they get stuck during the booking process?
5. What obstacles do users encounter while completing the booking process?

## Method

### Recruitment

We recruited participants by leveraging the social networks of Happy Campers research team. Each team member recruited two participants who met criteria for primarily REI’s core user profile. Participants completed a pre-study questionnaire to provide relevant demographic and background information. Participants were provided with a \$25 REI e-gift certificate as an incentive for their participation.

## Preparation

Prior to our usability study, each of our team members conducted a heuristic analysis of the REI Adventures page and booking flow on both desktop and mobile. However, for the scope of our usability study, we focused solely on the desktop experience of the primarily the booking feature. Therefore, we developed the scenarios and tasks for our study based on the key issues identified through our analyses, and to closely replicate the experience of a traveler once they were ready to book for themselves and two friends.

## Procedure

Over a one-week period, we conducted eight separate assessments, conducted 1:1 with a moderator and a participant. To support our research objectives, we conducted our usability assessments in environments that most closely resembled where a participant might plan and purchase travel—this included the participant’s home, workplace, or a nearby coffee-shop. Each participant utilized the moderator’s laptop (either MacBook or Surface Book) to access the [REI adventures site](#) via Chrome browser’s incognito mode. Sessions were videotaped<sup>1</sup> and screen recorded using Zoom. The moderator also took written notes.

The moderator briefed the participants to provide context and set expectations for the think aloud protocol we asked participants to employ. All participants completed a consent form<sup>2</sup> to indicate their willingness to participate, be recorded, and confirming receipt of incentive.

The scenarios and tasks, outlined in the Appendix, directed participants to find the Salkankay Pass trip to Machu Picchu, review itinerary page, select dates for travel, input profile information, complete payment page, modify, and attempt to cancel booking.

At the start of each task, participants were asked to read each scenario and task description aloud from a printed sheet and proceed with completing the task as they typically would if they were booking travel themselves. The scenario sheets provided dummy name, address, payment, and membership numbers to standardize and avoid use of participant’s personal information. The moderator observed and took notes on user behavior, user comments, and system actions. The moderator also noted whether/how the task was completed, and the number of prompts or hints needed. Participants completed a post-task questionnaire for key issues, and post-scenario and post-study questionnaires to provide more information using a Likert scale to evaluate overall ease/difficulty, assess satisfaction levels, and gather details about their overall experience.

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<sup>1</sup> The video-recording function was disabled for one participant. However, that session was captured via screen and audio recording.

<sup>2</sup> Consent forms available upon request.

## Data Collection

After completing all eight test sessions, our group collated data from written notes into an Excel form. We reviewed the video recordings and debriefed in person to prioritize and rate severity of key findings, and develop recommendations. Severity ratings were assigned on a scale from one-to-four, with four being most severe, based on number of participants and impact of issue on booking flow. The table below reflects data collected by task:

Task	Data
1.1	Completion of arriving at specified trip details page
	Method of arriving at designated trip
	# and type of hints/prompts needed
	Participant understanding of navigation and filtering mechanisms
1.2A	Completion of navigation and identification of trip itinerary details
	# and type of hints/prompts needed
	Participant understanding of itinerary details
1.2B	Completion of trip date selection
	# and type of hints/prompts needed
	Participant understanding of date selection
2.1	Completion of travel information input
	# and type of hints/prompts needed
2.2	Completion of specifying rooming preferences
	# and type of hints/prompts needed
	Participant understanding of room preference options
2.3	Completion of selecting the appropriate payment deposit option
	# and type of hints/prompts needed
	Participant understanding of payment options
	Expressed acknowledgement of noticing terms of use and cancellation policy
3.1	Completion of payment information input
	# and type of hints/prompts needed

3.2	Completion of changing rooming preferences
	# and type of hints/prompts needed
	Action/reaction to editing rooming preferences
3.3	Participant can recall cancellation policy
	Completion of finding cancellation policy
	# and type of hints/prompts needed
	Action/reaction to finding cancellation policy
3.4	Completion of cancelling booking
	# and type of hints/prompts needed
POST	Overall rating of experience
	Overall feeling of satisfaction
	Suggestions for improvement

Data collected from participants can be viewed here: <http://bit.ly/happycampersdata>

## Participants

Our participants were recruited based on the Hardcore Harper and Softcore Sam core user profiles provided by REI. We screened our participants to ensure that they met at least 3/5 of the following criteria we developed:

- Household annual income at least \$100k
- Activity level at least 3 miles in a day
- Has traveled outside of North America at least once in the last 10 years
- Has previously booked travel online
- Prefers a trip that is at least 3 days
- Doesn't currently have dependents living with them<sup>3</sup>

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<sup>3</sup> None of our participants indicated having dependents/or anyone under age 18 living with them currently, so this response is omitted from above table.



Participant pre-study questionnaire results						
P#	REI co-op member	# of times traveled outside of N. America in last 10 yr	Previously booked travel online	Preferred activity level (miles)	Estimated annual household income	Preferred duration of a trip (days)
P1	Yes	4+	Yes	12+	\$175k+	10+
P2	Yes	4+	Yes	12+	\$175k+	10+
P3	Yes	4+	Yes	3-10	\$100k-\$175k	10+
P4	Yes	4+	Yes	3-10	\$100k-\$175k	3-4
P5	No	4+	Yes	3-10	< \$50k	10+
P6	Yes	1-2	Yes	3-10	\$100k-\$175k	10+
P7	Yes	4+	No	At least 3	\$175k+	7-10
P8	No	4+	Yes	3-10	< \$50k	5-7

## Findings and Recommendations

### What worked well

- Task Completion: Majority of participants able to complete all tasks (7/8)
- All participants were able to complete all elements of booking flow tested (8/8)
- Participants liked searching and viewing trip options (4/8)
- All participants were pleased by type and quality of information on itinerary page (8/8)
- Participants loved the map on itinerary page, suggesting interest in interactive feature (4/8)
- Participants were delighted by information getting carried forward to payment page (5/8)

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## Pre-Study Questionnaire

Are you a current REI Co-op Member?

- Yes
- No

How many times have you traveled outside North America in the last 10 years?

- Never
- 1-2 times
- 3-4 times
- 4 or more times

Have you used a website or app to book international travel?

- Yes
- No

How would you rate your preferred activity level while traveling?

- Walking less than 3 miles (or less than 5 km)
- Walking at least 3 miles (or about 5 km)
- Walking/hiking 3-10 miles (or about 5-16 km)
- Walking/hiking 10-12 miles (or about 16-20 km)
- Walking/hiking 12 miles or more (or about 20 km or more)

What is your estimated annual household income?

- Less than \$50K
- \$50-\$100K
- \$100-\$175K
- \$175K or more

What is your preferred duration of vacation?

- 1-2 days
- 3-4 days
- 5-7 days
- 7-10 days
- 10 days or more

Do you have any dependents or anyone under the age of 18 living with you with whom you travel with?

- Yes
- No

# Post-Task Questionnaires and Data-Logging Forms

## Scenario 1

Your friend Clint has suggested that you and your other friend Janet go on an REI Adventure together. He's heard some good things about the Salkantay pass and Machu Picchu.

**Task 1:** How would you go about finding a trip on REI Adventures that goes to Machu Picchu and the Salkantay pass?

- *Starting State:* [REI Adventures Site](#)
- *Success:* Land on the [Machu Picchu Lodge Trek - Salkantay Page](#)

[Note how the participant arrived at designated trip]

- Destinations → Continent
- Destinations → Classic Destinations
- Explore all trips
- Your playground awaits → Continent
- Footer → Regions
- Footer → Classic Destinations
- Other: \_\_\_\_\_
- Did not arrive at designated trip without assistance

[Prompt, if they have not used filters yet] How would you go about finding trips that include snowshoeing?

[Note how many and what kind of hints you provided]

Number: \_\_\_\_\_

[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
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[Prompt] Why did you rate it that way?

**Task 2:** How would you go about finding which day you would see the top of Machu Picchu?

- *Starting State:* Trip details page from first task
- *Success:* User is able to navigate to itinerary to find Machu Picchu on day 7.

[Note whether participant could successfully find Machu Picchu day]

- Yes
- No

[Prompt] What, if anything, is confusing about the trip details provided on this page?

[Note how many and what kind of hints you provided]      Number: \_\_\_\_\_

[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

**Task 3:** You heard fall is a lovely time to visit. Pick a trip sometime this fall.

- *Starting State:* User is midway through the page and can select dates via global navigation, bottom of the page, or right side board.
- *Success:* Navigate to dates, scroll through date options, click to select available option, click book now, advance to “Book Now”.

[Note whether participant could successfully complete trip date selection]

- Departure Date at Bottom of Overview Page
- Departure Date Tab in Global Navigation
- Choose your date Panel
- Other: \_\_\_\_\_
- Was not able to select a date

[Prompt] What did you like about the way you picked the date? What did you not like or would change about it?

[Note how many and what kind of hints you provided]      Number: \_\_\_\_\_

[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

## Scenario 1 General Questions

[Prompt] What did you like the most about this process? What did you like the least?

[Prompt] On a scale of 1-5, how satisfied were you with the amount of time it took to complete the tasks in this scenario? Five being very satisfied and one being very unsatisfied.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

## Scenario 2

You're going to book the Machu Picchu adventure for yourself, Clint, and Janet. You and Clint want to share a room with two beds and Janet wants a room to herself.

**Task 1:** Use the information provided to start booking for you and your friends.

- *Starting State:* The book now page
- *Success:* Enter all travelers' information

[Note whether participant could successfully completed travel information input]

- Yes
- No

[Note how many and what kind of hints you provided] Number: \_\_\_\_\_

**Task 2:** How would you go about making sure everyone's rooming preferences are made.

- *Starting State:* The book now page - rooming preference
- *Success:* Select the correct rooming preference

[Note whether participant could successfully complete rooming preference input]

- Yes
- No

[Prompt] What are all of the rooming options available to you?

[Note how many and what kind of hints you provided] Number: \_\_\_\_\_



[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

**Task 3:** Show me how you would book the trip only paying a down payment today and paying the rest later.

- *Starting State:* The book now page - payment info
- *Success:* User understands \$1,200 represents deposit amount, they clicks to confirm they will pay deposit, they check box to indicate they have reviewed release form and terms of service, and they navigate to 'Continue to payment' button.

[Note whether participant could successfully select correct deposit option]

- Yes
- No

[Prompt] What are all of the payment options available to you?

[DO NOT PROMPT: Note whether user acknowledges cancellation policy]

- Yes
- No

[Note how many and what kind of hints you provided]      Number: \_\_\_\_\_

## Scenario 2 General Questions

[Prompt] What did you like the most about this process? What did you like the least?

[Prompt] On a scale of 1-5, how satisfied were you with the amount of time it took to complete the tasks in this scenario? Five being very satisfied and one being very unsatisfied.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

## Scenario 3

After entering your information, you're ready to move forward with confirming your trip, but some changes need to be made.

**Task 1:** Use the credit card information provided to fill in your information

- *Starting State:* Payment page
- *Success:* User enters information into correct fields and is able to navigate between them.

[Note whether participant could successfully input payment information]

- Yes
- No

[Note how many and what kind of hints you provided]      Number: \_\_\_\_\_

**Task 2:** Janet changes her mind and decides to save money by rooming with a stranger. Make this change to your trip and continue to payment.

- *Starting State:* Payment page
- *Success:* Successfully making the change

[Note whether participant could successfully completed changing rooming preferences]

- Yes
- No

[Note reaction to editing process]

[Note how many and what kind of hints you provided]      Number: \_\_\_\_\_

[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

**Task 3:** Do you recall what your options are if you aren't able to go on the trip for some reason after you've purchased it?

- *Starting State:* Payment page
- *Success:* Accurate recollection of cancellation policy or Navigate to information about the cancellation policy either via FAQ from top or bottom navigation, or by going back. User is able to find cancellation policy and review information.

[Prompt] Can you recall what happens if you cannot go?

- Yes, fully
- Yes, partially
- No

[Prompt] What would you do to learn more about cancellation policy?

[Note reaction finding cancellation policy]

[Note how many and what kind of hints you provided]

Number: \_\_\_\_\_

[Prompt] On a scale of 1-5, please rate the overall ease or difficulty of this task. Five being very easy and one being very difficult.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

**Task 4:** You decide maybe this isn't the right time. You don't want to go on the trip anymore. What do you do?

- *Starting State:* Trip ready to book with all traveler and payment information entered
- *Success:* Booking cancelled

[Note how participant canceled booking]

- Cancel Button
- Close Tab or Window
- Other: \_\_\_\_\_
- Was not able to figure out how to cancel

[Note how many and what kind of hints you provided]

Number: \_\_\_\_\_

### Scenario 3 General Questions

[Prompt] What did you like the most about this process? What did you like the least?

[Prompt] On a scale of 1-5, how satisfied were you with the amount of time it took to complete the tasks in this scenario? Five being very satisfied and one being very unsatisfied.

1	2	3	4	5
---	---	---	---	---

[Prompt] Why did you rate it that way?

## Post-Study Questionnaire

On a scale of 1-5, please rate the overall satisfaction with the booking process. Five being very positive and one being very negative.

1	2	3	4	5
---	---	---	---	---

Why did you rate it that way?

What would it take to get a 5?

What did you like the most about the booking process?

What did you like the least?

Do you have any suggestions for improving the booking process?

Do you have any other comments that you'd like to add?

# Scenario Sheets For Participants

## Scenario 1

Your friend Clint has suggested that you and your other friend Janet go on an REI Adventure together. He's heard some good things about the Salkantay pass and Machu Picchu.

**Task 1:** How would you go about finding a trip on REI Adventures that goes to Machu Picchu and the Salkantay pass?

**Task 2:** How would you go about finding which day you would see the top of Machu Picchu?

**Task 3:** You heard fall is a lovely time to visit. Pick a trip sometime this fall.

## Scenario 2

You're going to book the Machu Picchu adventure for yourself, Clint, and Janet. You and Clint want to share a room with two beds and Janet wants a room to herself.

**Task 1:** Use the information provided to start booking for you and your friends.

**Task 2:** How would you go about making sure everyone's rooming preferences are made.

**Task 3:** Show me how you would book the trip only paying a down payment today and paying the rest later.

### *Additional information*

#### **You**

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Birthdate: 5/12/82  
Member: 08236576

#### **Clint Butkus**

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206-867-5309  
Birthdate: 6/24/76  
Gender: Male

#### **Janet Schrute**

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Seattle, WA 98109  
janet.schrute@hotmail.com  
206-555-4754  
Birthdate: 12/9/88  
Gender: Female



## Scenario 3

After entering your information, you're ready to move forward with confirming your trip, but some changes need to be made.

**Task 1:** Use the credit card information provided to fill in your information

**Task 2:** Janet changes her mind and decides to save money by rooming with a stranger. Make this change to your trip and continue to payment.

**Task 3:** Do you recall what your options are if you aren't able to go on the trip for some reason after you've purchased it?

**Task 4:** You decide maybe this isn't the right time. You don't want to go on the trip anymore. What do you do?

### *Additional information*

Visa: 4800046146073603

Exp: 03/21

CW: 366