

[Title page not included] R Team Report

Executive Summary: U-Haul Website Usability Study

A usability study of U-Haul's website took place in March 2011. The unmoderated study was conducted with 5 participants who recorded their sessions for Team R's review and analysis. Study participants were given the scenario and tasks for the study and were asked to think aloud as they worked through the tasks. This evaluation of the testing sessions was conducted in May 2011 by a single evaluator (Team R) who reviewed the scenarios and tasks, then the videotaped sessions to determine the findings.

Participants

All 5 participants were rated as "average" for their web knowledge, and all stated that they had some experience with U-Haul. More information about each participant is presented in the following table:

Participant	Gender	Age	Occupation	U-Haul Experience
1	male	24	missionary	Used website to find price of tow dolly; did not purchase
2	male	52	small business manager	Familiar with U-Haul (website?); rented truck (long time ago)
3	female	62	retired; former TV news producer, then licensed paralegal	No info on web usage; rented U-Haul 3 times
4	female	36	housewife	Familiar with U-Haul (website?); rented trucks many times; also storage unit
5	male	31	Sales and marketing	Knows the company, but does not recall if he used the website 7 years ago when he rented a truck

Results

Top Positive Findings

- FAQs easily located and information was useful

- Top nav bar clear and accessible
- Suggestions for other purchase options helpful
- Indication of most popular insurance coverage option helpful
- Location search box takes data in many forms (zip codes, various spellings, even misspellings)
- Calendar supports easy selection of dates for pick up and drop off
- Ratings on locations support decision making
- System retains information input by user
- Interface easy to learn

Top Negative Findings

- Guidance for selecting truck size and storage unit size does not support users' accurate selection
- Totals not given in shopping cart; users have to add up totals themselves
- Pre-populated selections for add-on items not well received; some users missed deselecting items and were annoyed or surprised to find them in their shopping cart; others complained about having to zero out the pre-selections.
- Inconsistency in language/content:
 - phone number for storage/rental locations displays in some cases, but not others
 - insurance coverage explained differently in purchase process and FAQ area
 - distance from the address not consistently present; some parts of the website showed it; other parts did not, although the listing was by closest distance
- Display of fees poorly received; unclear.
 - Handling fee (what's this? Is it a one-time fee?)—description is overly wordy and lengthy
 - Environmental fee—what's this? Why can't this be rolled into the cost of rental?
 - Sales tax not added in (not available?). Came as an unwelcome surprise to some users.
 - No cost (\$0) for storage unit. Only one user had this problem but he could not figure out why there was no cost and tried several different ways to determine how to fix the error. (This may have been for the first month free offer, but it was not clear to the user or Team R.)
 - Totals not calculated as shopping cart is being filled
- Insurance coverage confirmation was problematic for several users; two thought that there were no extra costs (correct answer, but a bit hard to find; and one of these users said she would want to call to confirm); one thought that there was \$150 cost with the coverage (although this was only for NY); one thought that the person was liable for all costs because the cause was vandalism; but said he would have to call to confirm.
- Options for renting vs. buying supplies, such as a dolly, were not easy to find. Several users expressed frustration that they knew they had seen a way to rent a dolly, but couldn't figure out how to add it to the shopping cart.
- Mileage calculation is not clear; two users commented that they would leave U-Haul to confirm the mileage via GoogleMaps or MapQuest. Also, one commented that the truck rental was for 6 days when they wanted it only for 3 days.
- Terminology confusing in some cases; e.g., moving blanket vs. furniture pads

Organization of this Report

The information presented in this report covers the following areas:

- Methodology
- Findings [details would normally be in this report, but the requirements of this study are to put them in the Excel spreadsheet. Normally, we include the number of participants experiencing the problem, representative quotes for positive and negative findings, and, in detailed reports, screen captures]
- Post-task questionnaire assessments (not included)
- Post-test feedback mechanisms (not included)
- Recommendations

Methodology

Five participants were selected to use the U-Haul website to engage in a series of typical tasks associated with renting a truck and a storage unit. The studies were unmoderated; participants were given the study materials in advance and were told to describe their experience with U-Haul prior to the study and their reactions to working with the website after the study.

Team R (a single individual) was asked to review the five sessions, which ranged from 22 minutes to 41 minutes long, using the scenarios/tasks that participants were given, and to document the issues (positive and negative), based on the review of the sessions.

Limitations in this methodology include the following:

- No knowledge of the client's goals for this study
- No knowledge of the user screening criteria for this study or the selection process:
 - All users claimed to have some prior knowledge of U-Haul, but it was not clear whether all had experience with the website at any time in the past, or, in some cases, whether any had prior exposure to the current website
 - No information was provided as to whether any of the users had experience with any competitors; products or websites
 - All users were rated as "average" for the criterion of "web savvy," but no explanation was provided to understand how this level of proficiency was determined
- No opportunity to "test the test," including having input into the tasks/scenarios; participant recruiting, goals, etc.
- No prior exposure by Team R to the U-Haul website; thus, no opportunity to become familiar with the website before reviewing the first session
- No ability to consult with another Team R colleague to cross-check and thereby strengthen the findings and review/confirm severity ratings
- No ability to see or meet the participants or have any involvement with them

Findings

Positive Findings

Users liked the interface, the calendar, the helpful suggestions for additional product purchases, the reviewer comments to help them select locations for truck and storage rental, and the easy access and availability of FAQs throughout the process.

Several commented that they liked the way the website retained choices they had made earlier. They liked the map view for locations, and most understood the push pin icon for their location and the match of the numbers on the map to the locations in the list. They also liked that the default listing order was by closest distance from their location. One user clicked on the picture of the first location to see if it “looked safe.” Several users commented that they really liked having the ratings, and that they would not choose the first option (in one case) with only one star (and one rating).

All users easily found the information in the FAQs about whether a special driver’s was needed. This was the most successful task with 100% correct completion rate. It was their first choice to look for FAQs, so it clearly matched their mental model for where this information should be.

All users were able to successfully enter their pick-up and drop-off locations after one or two attempts. In the case of those making a second attempt, they did so to narrow their search from a starting point of a city or a zip code only. The system accepts many different ways to enter this information, including offering suggestions when the user misstypes. One user said, “Let’s see if it accepts zip codes . . . yes!”

Some users easily found the phone number to call the local location on their first try, but the phone number is not consistently displayed in all parts of the interface where locations are presented; users were confused by not seeing the phone number in these instances.

Negative Findings

Top issues

1. Insufficient guidance to accurately select the right sized truck and storage unit.

All 5 users failed at the task of selecting the right sized truck, either by selecting a truck that was too small or too large. One user requests an “advance search” option to try to narrow down the criteria for a truck selection. Another user asked for better descriptions or a way to enter your contents and get a recommendation.

All 5 users expressed a lack of confidence in selecting the right sized unit for storage. Even when a user made the right choice, he/she wasn’t sure how to choose the right size. Some expressed a need for a calculator. One said “I’m clueless about what size I need,” so she selected one bigger than she thought she needed. Another tried to calculate it, but says, “No, I’m figuring it wrong. I don’t know . . . I don’t know.”

This is the top negative finding from this study because users will be very frustrated when they actually pick up a truck that is too big or too small or start loading a storage unit that is too big or too small. Being successful at this type of task is critical to user confidence from the website experience.

2. Shopping cart extra fees, unrequested items, and untotaled fees created user problems.

Most users had a strong negative reaction to extra fees, such as the environmental fee and the handling fee. Most commented that they didn't know what these fees were and didn't like the addition of them. One user suggested that they should be rolled in to the base fee. One user clicked on the explanation of the fee and got a long, complex document that did not clarify the basis of the fee. One user was not confident as to whether the handling fee for the storage unit was a one-time or recurring monthly fee.

Several users wanted to see a running total for fees, and commented that they would have to add up the fees for themselves. The lack of availability of sales tax was also a point of concern, related to the total fee. One user did not see a fee for the storage unit and was completely confused by this. He tried several ways to get a fee to show for this rental, including removing the truck from his shopping cart, but was not successful in determining the fee. If this was a promotion for the first month free, he did not understand it (nor did Team R).

Several users did not realize that default "extras" had been put into their shopping cart until they saw the fees. At this point, they understood that they had missed deselecting a handtruck, for instance, and had to remove it. Users liked that the options for further purchase were offered but did not like that they were pre-selected and showed up in the shopping cart.

This issue is a top negative finding because the checkout process is confusing and irritating to users. Some might abandon the process at this point; others might have to stop using the website and resort to a phone call to make the transaction.

3. Prepopulated purchases confuse and annoy users.

While users expressed appreciation for the suggestions of extra supplies for their move, they did not like the prepopulated fields. Some deleted all of them; others missed seeing that some items were automatically added into their shopping cart (see item 2 above). One user thought that if he did not choose the "select" button for these extra items, they were not added to the shopping cart (Team R cannot confirm if this is a correct assumption). However, all users complained that they had to zero out or change the number of boxes, etc., when they were ready to select some items.

4. Content not always clear and consistent.

Some users could not easily find the phone number for the location of the U-Haul office, which was because the phone number is displayed in some parts of the website but not others (e.g., no phone number at the display of results for the pickup location).

Most users did not understand the language of the insurance cover and the collision damage waiver. One user commented, after going back to redo the truck rental process, that the language of the SafeMove option in this part of the process was not the same as the language of the FAQ about coverage. In addition, certain common industry terms for insurance coverage and damage waivers were not understood by users. One user clicked on the “view explanation” link under damage in the FAQs and waited for a slow loading PDF document to open. He then had to find the page that described exclusions to try to get the information he was seeking.

Several users were confused by similar terminology, such as furniture pads and moving blankets.

This is a top finding because it was time consuming for users to try to find the information they were seeking, and those who found it were often not confident of what they found. Two participants said they would have to call, and two participants came to the wrong conclusion about coverage based on their interpretation of the information.

5. Interface architecture and design sometimes confusing.

Although most users found the interface easy to navigate, several requests for different locations for information were made and some users had to make more than one attempt to locate information:

- One user requested a home page button in the top nav bar, and several users navigated the website via the back button (which sometimes did not work).
- One user requested a breadcrumbs approach to show steps in the ordering process (and also clickable links to go back or forward).
- Two users could not easily understand how to select a rental unit in their home city, as the scenario had them finishing the prior task in their drop-off location. Both of these users commented that they wanted a way to get to other locations from their place in the website. One user clicked on “more storage,” thinking it would take him to other cities.
- Two users could not see how to rent equipment, although both recalled that some equipment could be rented.
- Two users wanted a way to determine the mileage between points and to confirm the mileage provided by the website. Both said they would go outside the website to do this task.
- One person tried to remove an item from the shopping cart but automatically clicked on the first option on the left—“cancel” and was surprised that the item was still there. On the second attempt, she saw that “remove” was the second option to the right of cancel, and she commented that this was different from what she expected.
- Two users wanted the shopping cart to provide a way to select rental or buy options for additional items.

- One user was momentarily confused by the prior month's last week in March being visible and clickable in the April calendar; he had to study the calendar to see how it was displayed.
- One user wanted the option to add items to the left of the shopping cart and also wanted a "skip this step" option.
- One user wanted system feedback when the system repeatedly hung up (froze) for so long that she thought the site had crashed. Sometimes the "spinning wheel" indicated that the system was processing a request; other times, it froze up with no way to know what was happening.

Recommendations

The goal of the website should be to provide support for users to complete all of their desired tasks successfully, quickly, and confidently. They should not need to call a store for clarification or to confirm the proper selections for their situation. The following recommendations for changes are based on these five users' experience. Addressing the critical negative findings, while retaining the aspects of the site that result in positive findings, will improve the user's experience and increase revenues for U-Haul while reducing costs for customer support.

1. Improve information and guidance for selecting the right sized truck and the right sized storage unit.

Examples of strategies to try (and test with users) include more examples and/or a step-by-step completion form or wizard to guide users to the right selection. One user suggested a breadcrumbs approach to the steps of making the selection, adding in other materials, confirming shopping cart, etc.

2. Remove or subsume additional fees into the basic cost of the rental; if this is not in keeping with company goals, make the explanation of these fees clearer. Keep a running total of fees.

Perhaps a solution to different fees can be reached through embedded assistance, such as "what's this?" with a simple explanation would assure users of the nature of the fee, including whether it is one time or recurring. If there is a free month's rental, make the \$0 in the shopping card understandable with embedded assistance to explain one month free, as well as what the fee will be after that. Present the information about additional fees at the point of showing the base fee so that users are not surprised or put off by the additional fees at checkout. Keep a running tally of fees as users add or subtract items, so that users can see the total as they progress through the checkout process.

3. Redesign the shopping cart to show options for rental or purchase of additional items. Remove pre-selected, pre-populated items.

The shopping cart needs to allow users to add items as rental or purchase, with the choices clearly marked. Pre-selected items need to be eliminated.

4. Conduct a content and consistency edit.

Employ or assign a content expert/technical communicator to do a usability audit of the content for clarity, consistency, and completeness. Plain language should be used and terms explained, where needed. Content needs to be the same for the same items/information throughout the site. Longer term, establish a content strategy for adding new content and managing existing content.

5. Review the suggestions by users for interface design changes (see spreadsheet for items; also see #5 in top negative findings above).

Begin by adding a home button on the top nav bar for all pages other than the homepage. Consider the feasibility of implementing some of the other users' suggestions, as deemed appropriate by the developers.

Team R has two further recommendations regarding the results of this usability test:

- Test with users who have not had exposure to U-Haul or the website. A study of users without any exposure to U-Haul will reveal this user population's issues, some of which are very likely to be similar to the findings from this study, but others which are likely to be unique.
- When changes are implemented, test options at the wireframe or prototype stage to learn which design options prove most satisfactory to users.
- Conduct iterative testing throughout design to learn of the results of the changes on the user experience.
- Conduct A/B testing of U-Haul and your closest competitor's website to compare results.
- Add post-task and post-test measurements for additional feedback (both qualitative and quantitative) in your studies.