Using Ethnography and Narrative Analysis to Uncover Customer Agency
Intrepid Travel's Online Booking Project

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This paper draws on a discovery research project focused on the customer experience of Intrepid Travel's automated booking system. The Data Analytics team initially investigated customer behaviour when booking and found problems with high exit rates on the first and second steps of the 3-step booking process. A paradox was also found between the numeric NPS and CES scores for booking, and comments which revealed high volumes of customers requiring assistance from customer service to complete their online booking. The Product Manager for this project prioritised an extended discovery research phase to provide a more holistic understanding of the customer experience of online booking and answer some questions that arose from customer behaviours highlighted by the Data Analytics team. The UX Researcher's task was to design a research project that would analyse why customers were struggling to complete Intrepid Travel's automated booking process and provide recommendations to improve this system for a better customer experience.

The UX Researcher designed a qualitative research project with an ethnographic approach, which aimed to provide a detailed understanding of customer experience of Intrepid Travel's automated booking system. The project involved real customers completing actual online bookings, with participants from Australia, North America and Europe having their face, screen and voice being recorded in discussion with a moderator. These usability sessions highlighted customer's experience of decision-making, especially how the design of the booking system impacted a customer's sense of confidence, clarity and control. Ultimately, the results from this study demonstrated that Intrepid Travel's automated booking system negatively impacted customer's sense of agency in relation to their booking. The design and functionality of the choices presented to customers removed their ability to make decisions independently and instead caused confusion and a feeling of loss of control for customers. Using real customers who were engaged emotionally and psychologically with the booking process was crucial in uncovering agency as a causal factor in a negative customer experience with Intrepid Travel's booking system.

These details of the customer experience were highlighted in collaborative workshops with stakeholders and the product team facilitated by the UX Researcher. Two synthesis and analysis workshops were conducted with the aim of bringing stakeholders closer to the customer experience and engaging them directly with customer research. The Narrative Analysis workshop especially was impactful in drawing out customer's tacit needs, highlighting customer agency as integral to positive engagement with an automated system. Both collaborative workshops were successful in engaging stakeholders in how online systems can fundamentally impact customers emotionally and psychologically and pushing the customer journey beyond highlighting 'pain points' to solve with design.

This case study demonstrates the value of digital ethnography in uncovering how an automated system impacted Intrepid customer's ability to maintain agency in decision-making when booking a trip online. This research uncovered significant design problems and the findings created a platform for UX design principles that ensure that redevelopment of Travel's online booking system centres on customer agency.

COMPLEXITIES WITH ONLINE BOOKING

Intrepid Travel is an Australian adventure travel company which operates small group tours on all continents, providing customers with sustainable, experience-rich travel. The company started 30 years ago as a start-up initiative by two friends and has expanded since then, while keeping responsible tourism, a love for adventure and innovation at its core. Booking customers onto trips is the essence of Intrepid Travel's business. However, in 2018 70% of customers in the Asia-Pacific region were still booking through travel agents, rather than through the online booking system available on the website. With costs of commission to travel agents high, the effort of maintaining ongoing business relationships with travel agents and uncertainty in the travel retail space, there was a growing push within the leadership at Intrepid Travel to move customers onto direct booking channels. The potential return on investment that could be realised by shifting more customers in APAC, and globally to online booking prioritised a project that sought to optimise Intrepid Travel's online booking system.

To start the Direct Sales Optimisation Project, the Data Analytics team began with understanding overarching customer behavioural trends between clicking the 'book' button on the trip a customer has selected, completing the three-step online booking system and the email journey between confirming booking and departure on a trip. They discovered that between January 2017 and August 2017, of the 138,000 customers that click through from the 'book' button to the first page of the booking process, only 15,000 fully completed their booking; approximately 11%.

The Analytics team also looked at the 'exit survey' which popped up when customers clicked 'back' or exit on the browser during the booking process. Customers could answer a free text field in response to the question: 'what prevented you from booking online today', providing insight into the reason they were abandoning the booking. The comments from this field were analysed by text volume and trends revealed that many customers identified flights, room options and payment as causing them to abandon the booking process entirely. Despite this text volume analysis, it remained unclear why these particular topics were triggering an exit response from customers.

NPS and CES data linked to online booking demonstrated high numerical scores, however only reflected customers who fully completed their booking online. The comment content highlighted issues with email communications from Intrepid Travel post-booking and technical problems with the automated booking system that were resolved through a positive customer service experience. The comment content added complexity to the high numerical scores and raised further questions about the overall context of customer experience and satisfaction with online booking. The data from NPS and CES therefore was inadequate in providing a full picture of the customer experience of online booking and could not account for the experiences of potential customers who dropped out of the booking process.

A significant knowledge gap also existed for those within the company in understanding the customer experience and perceptions of email communications from Intrepid Travel between booking their trip and departing. Despite many people working on emails that were customer facing, there was a lack of accurate documentation, significant issues with siloing between departments, regions and software operating systems that emails were being sent from and no understanding of how this was affecting the customer's experience of

preparation for their trip. There was also no quantitative or qualitative data being collected on the email journey between booking and departure, presenting an issue in benchmarking the current state or proving any guiding metrics for understanding the customer experience of email communications in this important part of their customer journey.

Before re-design of the online booking system started, the Product Manager prioritised a discovery research phase as necessary to better understand the customer experience of online booking. These initial investigations by the Data Analytics team highlighted key knowledge gaps for further focus: what was triggering customers to abandon the booking process at high rates, and why customers were contacting customer service while booking online. Discovery research on customer's perspective on email communications between booking and departure were also scoped for this project. The UX researcher decided that an ethnographic approach would provide clarity and detail about the customer experience and fill these knowledge gaps. This qualitative research was positioned to provide insight into the context of customers struggling to complete bookings online and create findings that were actionable for developing an improved online booking system.

ETHNOGRAPHY AS A 'WHY' METHODOLOGY

The discovery research study design involved qualitative methodology: A diary study and usability sessions, aimed at capturing a holistic understanding of the customer's online booking experience from clicking 'book' on the Intrepid website to departure on their trip. The overall objective of this methodology was to provide detailed insight into why customers were struggling to complete an online booking in surprising volumes.

Usability sessions were designed to answer the overarching question 'how is the 'booking' stage of the customer journey being impacted by Intrepid Travel's automated booking system?'. The longitudinal diary study aimed at capturing customer's perspective on email communications from Intrepid Travel from the time of booking through to departure on their trip. Key research questions for the diary study were 'what are customer's information needs between completing a booking and departing on their trip?' and 'are email communications from Intrepid Group preparing customers for their trip in a way that meets customer's expectations?'. Both inductive methodologies would complement each other in providing focus, depth and detail into the customer experience from their own perspective and uncover key factors to be improved by a redesign of an online booking system and email journey.

This case study focuses on the usability study component of the research as this highlighted agency as a causal factor in customer's problematic engagement with the online booking system. Usability sessions were a methodology that proved critical in capturing insights on the customer's emotional and psychological engagement with the online booking system.

The usability component collected insights from 21 participants from Australia, North America States and Europe. Each participant had their screen, face and voice recorded during moderated usability sessions while they made an online booking for an Intrepid Travel trip. Data collection responsibilities were split regionally, with the UX researcher conducting usability sessions for Australia, and two non-researchers conducting usability sessions from London and California in their respective regions. To assist non-researchers in this role of data collection, training and resources were created by the UX researcher.

The UX researcher also provided a table of metrics (Figure 1.) to assist the non-researchers conducting usability sessions to understand what they should be looking for in those sessions and help them to conceptualise the 'data' that was pertinent to this project's aims. This was helpful in framing the study as including participant's emotional and psychological engagement with the online booking system alongside looking at usability and functionality.

Providing this table of metrics and training and ongoing mentorship of regional non-researchers was essential in emphasising the ethnographic approach of the project design and capturing the contextual data of customers making a real booking, as well as the details of them using the online system.

Global Research with Non-Researchers

The discovery research phase was scoped to understand the customer experience of booking online across all of Intrepid Travel's key global sales regions: Asia-Pacific, Europe and North America. Given that there is only one UX Researcher, and no other staff in a role that includes qualitative research, this global scope presented a significant challenge.

Scaling this project therefore involved using staff from other departments to work as proxy researchers that could collect data from Europe and North America. A marketing manager from California and a marketing executive from London were trained and resourced by the UX researcher to moderate usability sessions with customers in their regions independently. Using local staff to engage with customers in their own regions was advantageous to understanding regional nuances such as date and address fields in the passenger details section of the booking form, and different language and cultural expressions when discussing travel, payment and communication or customer service needs. Working across different time-zones was also made easier by having a localised moderator for usability sessions.

Working with staff from different departments and in regional offices was an opportunity to involve the wider business in UX research and bring others closer to one aspect of the customer experience. It presented a steep learning curve for the UX Researcher in being able to effectively and concisely communicate the essential information for the role of moderating usability sessions, best practice for qualitative research and an ethnographic approach in a limited time, with inexperienced individuals. The resources created to train and mentor the moderators for this project, have since been used to instruct other people in the company interested in being involved in UX research. This project has been a benchmark in democratising UX Research praxis, which has opened all stages of data collection and analysis to be inclusive of stakeholders. Projects since have involved non-researchers in moderating, note-taking, observing and synthesising data which has resulted in increased buy-in and interest in UX Research across Intrepid Travel. The value of good quality qualitative research and the insight it provides to business problems has also been recognised and acknowledged in regions outside of the Head Office in Melbourne, which has resulted in more demand for data-driven decisions. The learnings from the global scale of this project came from the challenges of conducting ethnographic research praxis with inexperienced researchers, but seeing reward from the results.

What the researcher is looking for	What the participant is doing	How the researcher collects this information
Usability	· Completing all fields · Understanding the UX copy · Understanding what is required with selecting options · Understanding what is required to move to next page · Can find information they need · Can access help if required · Can access booking information	· Watching screen · Asking if information is clear · Asking where they expect to find information · Asking where they would access help
Emotional Engagement	· Explaining why they chose this trip · Checking information for right trip · Checking departure dates · Checking personal information is entered correctly · Able to find information they need · Expression of comfort/ discomfort in providing information · Expression of security/ insecurity with payment · Checking payment confirmation	· Watching screen · Watching their face – where their eyes are looking. · Scrolling up and back to 'check' · Asking about security and comfort · Asking how they 'feel' during the process.
User Behaviour	· HOW they: · Look for information (engagement with search bar, tabs, filters) · Choice of room type, extras, TIF, payment · Expectations of emails following booking	· Watching screen · Asking about their choices · Asking about email expectations
Desires	· Saying what they were expecting that was not provided in the booking experience · Saying what would make their booking experience easier · Saying what needs are unmet by the booking experience · Demonstrating where a certain feature/ function could be	· Asking what their expectations are · Asking if they are looking for a feature/ function · Asking what would improve or assist their experience · Asking about their payment needs/ preferences, · Asking about communication with Intrepid

Figure 1. Table of metrics for conducting usability sessions

Researching the 'Real' Customer Experience

Capturing real customers completing an actual booking was integral to understand emotional investment, confidence and decision-making when focusing on customer interactions with Intrepid Travel's automated booking system. To use real customers for this project required a somewhat complicated recruitment process; customers had to be recruited at an opportune window between being ready to book and completing a booking.

Gaining consent from participants was another significant hurdle because the online booking system requires personal information as part of the process; some of which would be captured with screen recording software. The need to establish balance between a desire to fully capture people's authentic experience with entering personal details into the system, with a need to protect their privacy and be aware of ethical research practice was apparent. A carefully worded consent form explicitly laid out all the details of what was to be included and excluded in the screen recording, who would be able to access the data and how it would be stored securely. Recruitment for this project in the right timing, and with a lengthy consent form, was difficult and returned a high drop-out rate, which strained time-lines and the effort of regional moderators in balancing this project with their usual Marketing roles.

Software called 'Lookback' enabled the moderators to capture the booking process, as it records a participant's screen, face and voice simultaneously, while allowing them to be interviewed at the same time either remotely or in-person. Participants could use their own device, and sessions could be conducted remotely as the software could be easily set up by the participant installing the app or clicking a link with set up prompts. Each usability session took between 30 minutes and an hour. The sessions followed customers through the entire process from clicking on the 'book' button on their selected trip, going through each step: entering their passenger details, selecting room type, selecting extra services and donating to The Intrepid Foundation, making a payment (full payment, deposit or hold), and finishing with the booking confirmation page and going through the 'My Booking' portal. Throughout this process, the moderator asked them to explain their process, 'think aloud', describe their expectations and hesitations and talk through their frustrations.

The project included 21 participants in total, with 9 customers from Australia and 6 customers from North America completing an actual booking while being recorded using Lookback. Data collection from Europe, however, was affected by the difficult recruitment process and using a non-researcher with limited time to spend on recruiting real customers within the project deadlines.

This resulted in the participants from Europe consisting of 6 friends or 'friends of friends' which meant they did not have the intention of completing a real booking. The difference between these 'proxy' users who stepped through the online process and real customers engaged in the process and outcomes of a booking was stark. The users who were not making an actual booking, gave more comments on the visual design of the booking process, the functionality and copy, rather than the broader context of their expectations, the outcomes of choices and decision-making. These proxy users did not double check their information and were not invested in the rooming or extras options, although some expressed confusion about the display, copy and layout. They moved through the usability sessions quicker and did not go through the payment process, and therefore did not deliberate about the different payment options or their booking or payment being confirmed.

The data collected from the European users was therefore used primarily for closer analysis on system functionality, usability, layout and design as the data on emotional and psychological engagement was not captured with proxy users. The European data was stored with the North American and Australian data but marked as 'usability' data and analysed somewhat separately to the sessions with real customers. The themes emerging using axial thematic coding were different due to the nature of user engagement with the booking system. Thematic coding for the European data did not show significant results for agency, effects on user's confidence or sense control, instead highlighting individual features of functionality and design as the most important for users. Notably, solely using proxy users in the project may have missed agency as a primary causal factor of a problematic customer experience with the booking system.

Proxy users in the UK demonstrated the comparative value of engaging real users in Australia and North America, and the different level of insight when customers were emotionally and psychologically invested in the booking process. The impact of having real customers participate was clear in the results from the data, and the value of maintaining the intended research design is a lesson learned for future UX research projects to keep the data consistent and easily synthesised and analysed. Using real customers instead of 'users' in Australia and North America demonstrating their booking experience pushed the metrics of this project beyond functionality, heuristics and usability and were essential in uncovering agency as a foundational aspect of customer experience with the booking system.

Findings from Usability Sessions:

The overarching insight from observing customers engagement with Intrepid Travel's automated booking system was how the system caused customers confusion, a loss of confidence and a need to clarify or seek further information on decisions that were necessary for booking. Ultimately, customers felt their ability to maintain a sense of agency in independently being able to decide on booking options according to their needs, and in relation to their selected trip was undermined by the design and function of the online booking system. The following is more detailed breakdown of the key insights leading to this conclusion:

The series of choices presented to customers in the online booking process were the most significant pain point. Some choices presented to customers came without warning, were ambiguous and had unclear outcomes: especially room type and extras selection.

> (Customer selecting room type) there is no information that clearly says I will be sharing with my sister, it says I will be sharing, but not with the co-passenger, I will call because I am not sure.

As customers proceeded through the booking steps, they lost confidence and trust in the outcomes of their selections and were not sure of what actions would be taken by Intrepid Travel to confirm their room type and any extras they had chosen. This affected customer's agency by making them unable to understand the impact of their choices, and link decisions to outcomes.

Customers felt the need to double check information about their booking at each stage of the booking process, and when this information remained unclear, felt the need to contact

customer service by phone or use live chat to clarify. Their ability to maintain independence when making decisions about their needs regarding their trip was therefore impacted.

Travel industry specific language such as 'on request' and 'single supplement' also caused confusion among customers unfamiliar with travelling. This increased customer's sense of loss of control, confusion and contributed to them losing confidence in ownership of their decisions related to their trip.

Information customers were expecting, ie. pricing when selecting airport transfers, was not available which made them feel out of control of their budget and feel a loss of responsibility for their trip. There was also no information available about how or when the customer could have access to pricing information, if they were responsible for following up, if they were locked-in to a selection or if a quote would be provided as optional, or what the post-booking process was.

> (Customer selecting extras) I just want to see how the price changes when I select these options. At this point I am wondering if it will affect my total trip price, because it just says 'to be confirmed'.

On the same page in the second step of the booking process, the customers were confronted with 8 ambiguous choices, the final choice being a donation to The Intrepid Foundation. For most customers participating in the usability sessions, this was the first time they had seen The Intrepid Foundation and so they felt it was just another choice they had limited information on and were again uncertain of the outcome. The choice presented was to donate '2% of their booking price', however a numerical amount was not provided. The cognitive load for the majority of customers at this point was high, which lead to them choosing not to donate.

When at the payment stage, customers who started by being ready to fully commit to booking and paying in full or a deposit, chose to place their trip on hold (button option) because they wanted to clarify information they were unsure of by phone or email before paying. Many customers felt that agency over their budget had been affected by not having pricing information if they selected extras, making them feel a loss of control.

> Oh this is good - I have the option to place my booking on hold which means I can call and talk to someone before making a payment.

Customer's end goal of booking a trip with confidence, became obscured by the number of ambiguous or confusing choices and outcomes that were part of the decisions necessary to complete the booking process. Intrepid Travel's automated booking system negatively affected customer's ability to maintain their sense of agency in booking the trip of their choice and selecting options relating to their needs.

ANALYSIS AND STAKEHOLDER ENGAGEMENT

The online booking project involved global research and was guided by an ethnographic approach therefore the UX researcher decided that synthesis of the research would have to be inclusive, collaborative and digital in order to maintain the global scale of the project. Collaborative workshops were designed by the UX Researcher with the with the aim of bringing non-researchers directly into the research synthesis and analysis process, engaging

stakeholders more directly in the customer experience. This was a significant shift from previous practice of the UX researcher working singlehandedly to synthesise data and present conclusions exclusively to the product development team working on the project in sprint. The workshops included Business Analysts, Product Owners, CX Managers, Web Developers, UX Designers, Customer Relationship Managers and Sales Staff and were instrumental in creating buy-in from these stakeholders of customer insights. The workshops enabled each participant to gain a close understanding of the customer experience of the booking system, to contribute their perspective and expertise collaboratively and take responsibility for their role in improving the online booking system for the customer.

Thematic Coding with Trello Workshop

After creating comments from each usability session recording, the UX researcher intended to look for themes and patterns, using axial coding methodology and ascribing manifest and latent themes simultaneously. However, to both save time and take the opportunity to involve non-researchers in research work, the UX researcher decided to code the text data in a collaborative workshop. Participants in the workshop had no previous experience with qualitative coding, so Trello was chosen as a simple and accessible tool to enable collaborative participation and efficient data processing, while still producing usable results.

Trello was utilised as a tool for organising text data from usability sessions and analysing this data using a Grounded Theory approach (Glaser & Strauss 1967). Trello is not expressly built for this purpose, but it's comment card, labelling and sticker functionality can be easily adapted to research synthesis in a simple way that everyone can readily understand and use. The UX researcher set up the Trello board so that one list represented a de-identified research participant, and the cards were their transcribed comments and comments about their screen use from their usability session where their booking process was recorded.

During the workshop, each workshop member was assigned one research participant Trello list to work with. Together, each workshop participant familiarised themselves with the customer journey of one customer, spent time reading the comments, understanding the pain points and triggers for action such as wanting to contact customer service. A discussion was then held after this familiarisation process, where workshop participants shared insightful moments in their customer's journey, and themes started to emerge, as workshop participants realised that some 'moments' were similar across different customer journeys. The next phase of the workshop involved workshop participants applying Trello labels as 'codes' both manifest and latent together on customer comments, and stickers of smiley faces to note sentiment. Coding was based on a Grounded Theory (Glaser and Strauss 1967) approach, with labels not firmly decided before being applied but rather discussed collectively as people began to interpret the raw text data. Talking aloud as they went, the workshop participants discovered themes and patterns across the customer journeys, and the codes began to reflect these patterns and become more aligned. The workshop ended with identifying and collating the key themes that emerged when going through the customer data and discussing significant pain points and turning points in the customer journeys. It was at this point that themes of customers losing confidence in their decisions, seeking clarity of information or wanting help from customer service, and which choices caused confusion for customers was shared. The result was that each product team member, CX manager and

web developer had a detailed understanding of one customer journey, and an understanding of how that one journey fit into the patterns and themes of other customer journeys. Using this digital synthesis process to draw out the pain points and trigger points for emotional responses evoked by the customers interaction with the booking system was a powerful way to elicit empathy with the customer. Coding collaboratively also produced usable, synthesised research results quickly and effectively on a digital platform accessible to all involved in the project. The Trello board with this customer data is still utilised by the product team as a reference to the customer experience.

Narrative Analysis Workshop

Following directly from the Trello coding workshop, the same participants gathered for another workshop to explore the customer's relationship with the online booking system in greater depth. To do this, the UX Researcher chose to use Narrative Analysis to guide the workshop and apply some abstract thinking onto the customer journey with online booking.

Narrative Analysis combines epistemology and anthropology by relating a human experience of a certain phenomenon and overlaying this with how a knowledge structure, or storyline is built to understand the interplay between characters and events within that experience (Sinclair Bell 2002). The analysis format takes the shape of the story plot, roles of the characters, trigger points, chains of causation and the conclusion to provide structure and context to human experiences (Golsteijn & Wright 2013). Narrative Analysis' strength as an analysis tool is to draw out users' tacit needs, those unspoken or unarticulated desires that are not easily accessed through direct questions (Pucillo et al. 2014; Clandinin & Rosiek 2007). Storytelling offers participants in the narrative an opportunity to 'read through the lines'; to interpret emotional and psychological subplots and understand the position of different characters in relation to each other (Pucillo et al. 2014). Narrative Analysis engaged workshop participants in the underlying 'story' of the customers struggle with booking online.

For the context of this project, The UX researcher positioned the user of the booking system and the booking system itself as opposing protagonists in the narrative of a customer aiming to complete a booking on a trip. We started with discussing what the customer's starting position was before 'meeting' the automated booking system to establish how that relationship subsequently played out. Each workshop participant was asked to keep their customer journey in mind that they had coded for with Trello, but also keeping an aggregate 'portrait' of a customer trying to book an Intrepid Travel trip. Workshop participants concluded that before 'meeting' the booking system, a customer is confident of their choices, ready to commit, feeling in control of and responsible for their budget, decisions and travel plans and excited to finalise the next part of their travel by booking their Intrepid Travel trip. Establishing customer agency as the starting point based on data from the usability testing was critical in understanding how the user's positionality changed in the storyline of making their booking. So, what happened when the customer met the online booking system?

We used the following questions to guide an analysis of the customer's narrative of engagement with the online booking system:

- Where do customers situate themselves in the narrative of booking an Intrepid trip online? How does the narrative develop, is there a sense of an underlying ideal or aim the participant is trying to attain?
- Do customers maintain the agency they started with, or are they subject to certain influences or power out of their control?
- At what points in the booking journey do these power structures between the customer and the online booking system switch or change? what are these changes influenced by?
- What do customers identify as getting in the way of fulfilling their journey? What do we, having knowledge of the system or the business, see as getting in their way? What do the customers do when they come across blockers?
- Where are their high points and low points in this narrative – who or what is involved in creating these moments?

By using these questions to guide the analysis process, the workshop participants were able to identify the problematic dynamics of agency, control and responsibility that sat at the crux of the relationship between the customer and the online booking system. Narrative analysis applied to this project abstracted the customer from simply being the user of an automated system, to a person with agency, whose interactions with an online booking system affected them psychologically and emotionally.

Using this analysis methodology tangibly changed the stakeholder perspective on the booking system and its impact on customer experience. Working collaboratively also allowed people in the workshop to have their own moments of realisation, connection between concepts and real empathy for the customer that pushed beyond just the recognition of pain points.

Workshop Conclusions

Uncovering the specific ways in which the automated booking system progressively unravelled a customer's confidence and control, made workshop participants realise the clear connection between digital design and agency. The establishment between user's lack of control, confidence and clarity while making a booking led the product team to decide to have these principles as foundations for the new booking system. Coming to those conclusions collaboratively, having been on the journey, meant that the product team fully understood why agency was a causal factor in customer interactions with a booking system. They were therefore fully invested in designing solutions that maintained clarity, confidence and control; ultimately an overarching and sustained sense of agency for the customer when making an online booking with Intrepid Travel.

IMPACT OF CUSTOMER AGENCY ON PROJECT OUTCOMES

Results from this research and analysis had direct impact on new product development, UX design for the new booking system and transactional emails between booking and departure. Each sprint team member had been connected closely to at least one customer's

experience of the booking system through the Trello synthesis and Narrative Analysis workshops. This empathy with the customer experience affected the prioritisation of product development work, where room type and extras, having the most significant negative impact, was given most attention and focus. For this case study paper, I will focus on the UX design outcomes for the new booking system, as these most clearly demonstrate the impact of the research results. Product development for the new booking system and transactional emails relating to booking is still a current, ongoing project. Therefore, work on the email journeys has not come into focus for the project team yet.

Customer choices and the outcomes of those choices were found in research to be the most significant issue affecting customer agency when booking. Therefore, the product team chose to prioritise work which improved the customer experience of decision-making within an automated booking system.

Translating Clarity, Confidence and Control Into UX Design

The UX designer and UX researcher worked closely together to synchronise the customer research into design principles that maintained customer agency throughout the booking process. Combining visual hierarchy, information boxes, iconography, UX copy and micro-copy were underpinned by the aim of providing customers clarity, confidence and control; together maintaining customer agency through the entire booking process. Designing for clarity included visually demonstrating where a customer is along the booking process, and which step they must complete next. Also providing clear information between the choice's customers are making combined with information and/or confirmation on the outcomes of those choices. Confidence could be translated into design by UX copy that ensures customers are making informed decisions during booking that are appropriate for their needs. Design that communicates what customers must do at each stage of the booking process in order to complete a booking for their selected trip also aimed to increase a sense of confidence for customers. Lastly, a focus on control translated to UX copy that communicates to customers the difference between their responsibility and Intrepid Travel's responsibility in taking actions related to their booking. The following figures demonstrate these design principles in UX wireframes for the 'Rooming Options' page [Fig.3] and the 'Optional Extras page [Fig.4].
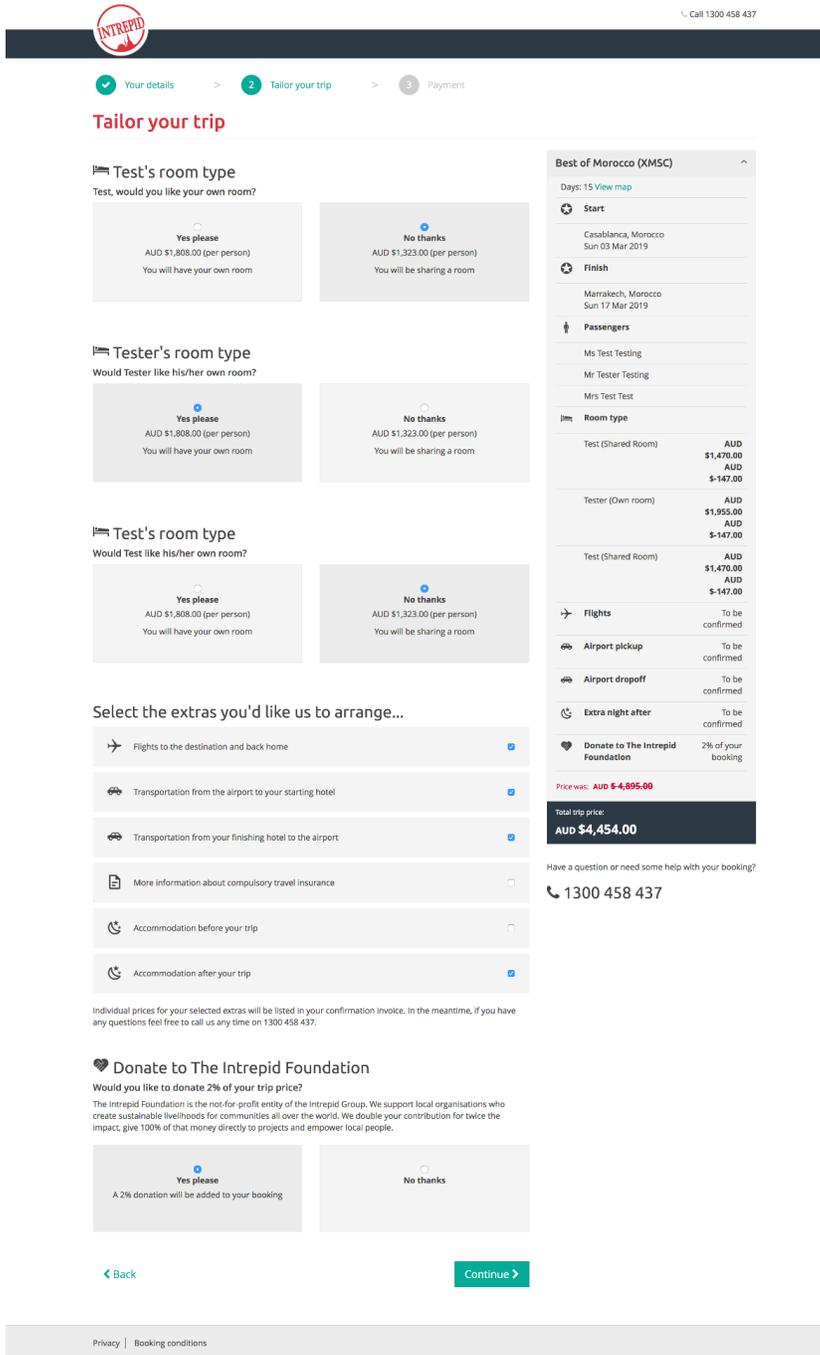
Figure 2. Before – 'Tailor your trip' page: Room Type, Extras and The Intrepid Foundation donation.

Figure 3. Proposed UX Design for 'Rooming Options' in new booking system.

This is the UX Wireframe [Figure 3.] for a customer booking a trip with two passengers, selecting their room and bedding options simultaneously. Here the selection process is made clear with the combination of UX copy, visual representations of the bedding configurations and pricing for single supplements, without the 'travel jargon'. Customers can clearly identify the outcomes of each choice, understand that they will be choosing both a room and bed, and that the other passenger that is part of the booking is included in their selection.

Figure 4. Proposed Design for 'Optional Extras' selection

The UX wireframe for Optional Extras selection [Fig.4] is a separate page to 'Rooming Options' to reduce the cognitive load of multiple choices for customers on each booking step. The UX copy details that selections made by customers will be responded to by Intrepid Travel within 48 hours. There is also more detailed information provided for each choice, and the copy is friendly and free from travel jargon. This provides customers clarify on their selections, where they are confident that selecting a 'quote on flights' will provide them with a quote on flight options from Intrepid Travel within 48 hours.

These UX wireframes make the principles of clarity, confidence and control derived from the research tangible, and contrast with the confusing presentation of decisions in the 'before' example.

CONCLUSION

This case study highlighted the value of an ethnographic approach on understanding real customers engagement with an automated booking system, and how this affects them emotionally and psychologically. Central to human agency, is the ability of individuals to control their actions, where there is direct connection between one's actions and the outcomes (Young & Beckmann 2005). For a user interacting with an automated system, a sense of agency relies upon the user having control over their input and receiving a response from the system which acknowledges their intention (Anderson 2008). Intrepid Travel's automated booking system affected user's sense of agency by presenting them with choices and outcomes which were ambiguous; thus, removing control in users making their own decisions. The design and function of the booking system progressively caused customers to become confused about choices relating to their trip, feel a loss of confidence in their decisions and ultimately lose a sense of control over their actions. Ultimately, these factors contributed to users feeling a loss of agency, which resulted in customers abandoning the booking system altogether, or calling customer service to clarify information and restore their confidence and sense of control. UX design that assists customers in being able to independently make decisions to complete their booking provides a positive experience for customers.

Using real customers and digital ethnography through screen and face recordings enabled metrics to be captured beyond usability and functionality of a web product. Highlighting the complexity of this experience with booking a trip provided answers to the 'why' questions of customers exiting the booking process and having high incidence of contacting customer service with questions about room type and extras. Using analysis techniques that engaged the web development team and key stakeholders from the customer experience department had a positive impact in creating understanding and empathy for customers booking Intrepid Travel trips online. Using Narrative Analysis especially, demonstrated to the workshop participants how abstract social concepts such as agency can be derived from customer data, and become tangible, usable insights to drive impactful decisions. Understanding the customer experience of booking a trip holistically, assisted the product development team in prioritising design solutions that would improve customer experience dramatically. Maintaining customer agency as a foundational aspect of booking a trip through design that promotes confidence, control and clarity proved an essential component in the success of this project.

Alice Watson is an anthropologist working in UX Research, and passionate about bringing ethnographic theory and praxis together with technology to make impactful UX design. Alice is passionate about storytelling, sense-making and exploring connections between human needs and design. You can contact her at alice.watson@intrepidtravel.com

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