

PARTICIPANT APPROACH

CONTEXTUAL INTERVIEW

Interviews conducted with customers, employees, or any other relevant stakeholders in a situation—al context relevant to the research question; also known as contextual inquiry.

Duration	<p>Preparation: 0.5 hours–8 weeks (depending on accessibility and legal regulations)</p> <p>Activity: 0.5 hours–4 weeks (depending on number and availability of interviewees and researchers)</p> <p>Follow-up: 0.5 hours–4 weeks (depending on amount of data)</p>
Physical requirements	Notebook, photo camera, voice recorder, video camera, legal agreements (consent and/or confidentiality agreement)
Energy level	High
Researchers/Facilitators	Minimum 1 (a better approach is to have teams of 2–3 researchers per interview)
Participants	Minimum 5 (but aim for at least 20 per group)
Expected output	Text (transcripts, field notes), audio recordings, photos, videos, artifacts

Contextual interviews can be done, for example, with employees at their workplace or with customers during a specific moment of their customer experience. Contextual interviews are used to understand a certain group of people better: to understand their needs, emotions, expectations, and environment (useful for personas), but also to reveal formal and informal networks and hidden agendas of specific actors (useful for system maps). Besides, such interviews help to understand particular experiences as interviewees can demonstrate actions in detail and in context (useful for journey maps). Try to ask your interviewees about a specific experience that they’ve had (e.g., the last time they used the service) and to demonstrate details of this concrete experience. It is often easier for people to articulate pains and gains when they refer to concrete examples than when describing an experience in more general terms. Contextual interviews can be conducted rather openly, following one leading research question, or in a semi-structured way, following interview and observation guidelines (see participant observation).⁰¹

⁰¹ See, for example, Beyer, H., & Holtzblatt, K. (1997). *Contextual Design: Defining Customer-Centered Systems*. Elsevier.

In contrast to retrospective interviews, contextual ones are conducted in situ, with the advantage that researchers can observe the environment and interviewees can point to elements in the environment. This makes an interview much more tangible and active. Interviewees tend to be more open and engaged, as they are often conducted in a context that is familiar to the interviewee.

Interviewees also tend to remember more specific details than in retrospective interviews or focus groups, and researchers gain a much more holistic understanding. Often, contextual interviews use techniques like the Five Whys to gain a deeper understanding about the underlying motivations for specific actions of the interviewee.

It's important to document the situational context in which the interview takes place. Besides season, weekday, time, and place, other factors may affect the situational context, such as weather conditions or other customers. Also, be aware of the interviewees' mood, and observe their gestures and body language.



- A** Contextual interviews help interviewees to articulate problems and needs as they are in the situational context, as they can simply show things right where they are.
- B** If possible, also take audio or video recordings as less-biased raw data sources.
- C** Collecting artifacts or taking photos of relevant artifacts can help to understand the situational context of your interview.

Step-by-step guide

1 Define specific research question

As always, you need a leading question or a set of questions representing what you want to find out. Also, consider why you are doing research (exploratory vs. confirmatory research), what you want to do with your findings (personas, journey maps, system maps, etc.), and what sample size you'll probably need.

2 Identify interviewees

Based on your research question, define criteria for selecting suitable interviewees, considering not only who you interview, but also when and where. Use sampling techniques to select your interviewees and consider including internal experts or external agencies for interviewee recruitment.

3 Plan and prepare

Plan how to approach your interviewee. What expectations do you set beforehand, how do you start, how do you end, and how much time do you plan for the interview? Write up interview

guidelines based on what you want to find out and what experience you are trying to achieve for your interviewee. Such guidelines should be semi-structured, so that they help you not to forget anything during the interview, but give you the flexibility to change your agenda if useful. Also, consider who you want to include as interviewers from the client side or from other departments involved in the project. Agree on how you'll document the interviews and set up legal agreements if necessary to take voice recordings, photos, or videos.

4 Conduct interviews

During the interview, ask open and non-leading questions. Consider using specific interview techniques, such as the Five Whys, to reveal underlying motivations. Use the situational context and ask interviewees to demonstrate specific activities or artifacts they are talking about; saying "show me" in a contextual interview is very useful, as people often say something different from what they actually do. Agree in advance on the roles within your interviewer

team; establish beforehand who will ask questions, and who will observe and take notes. During your interview, try to collect as much unbiased "first-level construct" raw data as possible. The length and depth of contextual interviews varies with the research objective: from several quick, 5-minute interviews at, say, a ticket machine in a train station to interviews of 2–3 hours at home or at a workplace.

5 Follow-up

Write up your individual key learnings right after the interview and compare them within your team. Keep track of all your documentation (e.g., by indexing your field notes, transcripts, photos, audio and video recordings, and collected artifacts) and highlight important passages. For each interview, write a short summary that includes your key findings as well as raw data to exemplify these, such as quotes, photos, or videos. Don't forget to link the summary to your interview data (that's where indexing comes in very handy). ◀