Market Data / Supplier Selection / Event Presentations / User Experience Benchmarking / Best Practice / Template Files / Trends & Innovation

SAMPLE: User Experience

Buyer's Guide 2011

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http://econsultancy.com/reports/user-experience-buyers-guide

SAMPLE: User Experience

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Contents

1. Introduction

Econsultancy's buyer's guides are the ideal starting place for anybody researching new suppliers in digital market sectors. They contain **in-depth vendor profiles**; to help you quickly evaluate suppliers and service providers, as well as **market analysis** to help you put things into perspective. Vendors are selected for the report based on a combination of factors, *not limited to but including*:

- **Analysis of capabilities** (services / products)
- **Clients**
- **Experience** (qualifications / trade bodies / case studies / client lists)
- **Expertise** (by sector / topic),
- **UK status** (a UK office is preferred, occasional exceptions are made)
- **Ability to take on and fulfil new projects**
- **Recommendations from trusted sources** (or anecdotal evidence to the contrary)
- **Google visibility**
- **Business model** (a high % of turnover should be related to these services)
- **Company website**

Econsultancy does not explicitly recommend any of the suppliers featured in these guides, principally because it is impossible for us to work with all of them to form a first-hand opinion. But we do believe - based on an intensive and careful selection process - that the chosen vendors represent quality.

Buyer's Guides are updated on an annual basis, so the information contained within is recent and thus valid. Send any questions or comments to aliya.zaidi@econsultancy.com.

2. About Econsultancy

Econsultancy is a digital publishing and training group used by more than 200,000 internet professionals every month.

The company publishes practical and time-saving research to help marketers make better decisions about the digital environment, build business cases, find the best suppliers, look smart in meetings and accelerate their careers.

Econsultancy has offices in New York and London, and hosts more than 100 events every year in the US and UK. Many of the world's most famous brands use Econsultancy to educate and train their staff.

Some of Econsultancy's members include: Google, Yahoo, Dell, BBC, BT, Shell, Vodafone, Virgin Atlantic, Barclays, Deloitte, T-Mobile and Estée Lauder.

Join Econsultancy today to learn what's happening in digital marketing – and what works.

Call us to find out more on +44 (0)20 7269 1450 (London) or +1 212 699 3626 (New York). You can also contact us online.

3. Executive Summary

The focus of this report is user experience, with a discussion of market trends and profiles of 27 agencies specialising in user experience and usability services. The profiled agencies all have a presence in the UK.

The UK user experience market will grow by an estimated 8% in 2011 to a value of £222 million.

The market for user experience services is maturing, and many companies are thinking strategically about how user experience can be used to optimise the customer experience. User experience has now been established as a hygiene factor, and is essential at every level of the organisation.

Although businesses are gradually recovering from the slowdown caused by the recession, the economic outlook is difficult to predict. What is clear is that there will be a continued focus on improving the customer experience, while also demonstrating return on investment.

The good news is that it is getting easier to measure success, due to the proliferation of testing tools and increasingly sophisticated analytics solutions. However, analytics data must be combined with user experience data (such as user behaviour) to garner actionable insights.

There are plenty of new exciting opportunities in 2011, with many technological innovations in devices and formats. The addition of touch-screen technology adds another dimension to the user experience, which is both an opportunity and challenge for practitioners working in this space. The introduction of new web standards (including HTML5) will help to make user experience more immersive, interactive and engaging.

Trends within this market include:

- Companies focus on strategy as market matures
- Companies recognise the link between business performance and customer experience
- Humanisation of user experience online
- Analytics becomes important – but not the silver bullet
- Wider range of new formats and devices available
- The evolution of search impacts user experience

The buyer's guide contains profiles of the following user experience agencies:

Amberlight Partners, Bunnyfoot , Clearleft, Cogapp, cxpartners, Experience Solutions, Flow, Foolproof, Fortune Cookie, Foviance, Human Factors International, Nomensa, One to One Insight, PRWD, RedEye optimum.web, Serco ExperienceLab, SimpleUsability, Spotless , Interactive, Super User Studio, System Concepts, The Usability Lab, User Vision, Userfocus, we are: london, Web Usability Partnership, Webcredible , Your Mum

Related Econsultancy reports and content

Econsultancy / Foviance Multichannel Customer Experience Report 2010
http://econsultancy.com /reports/multichannel-customer-experience-report

Econsultancy / cScape Customer Engagement Report 2011
http://econsultancy.com /reports/customer-engagement-report

Product Pages: A Best Practice Guide
http://econsultancy.com/reports/product-pages-a-best-practice-guide

Mobile E-commerce Best Practice Guide
http://econsultancy.com /reports/mobile-e-commerce-best-practice-guide

How to create amazing Facebook pages
http://econsultancy.com/reports/how-to-create-amazing-facebook-pages

Achieving Digital Balance
http://econsultancy.com /reports/achieving-digital-balance-best-practices-for-mastering-digital-strategy-and-budgets

Usability and User Experience Business Case
http://econsultancy.com /reports/usability-user-experience-business-case

Usability and User Experience Request for Proposal
http://econsultancy.com /reports/usability-user-experience-request-for-proposal-rfp

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4. The Market

4.1. Market value and growth

Market Value

The UK user experience market will grow by an estimated 8% in 2011 to a value of approximately £222 million.

Econsultancy

Econsultancy's total valuation includes both agency revenues and in-house spending on user experience. We have included spending with both specialist user experience agencies as well as the relevant earnings of more generic full-service agencies.

Econsultancy had previously estimated that this market was worth £178 million in 2007 and, before that, £148 million in 2006.

Value of UK User Experience Industry

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Source: Econsultancy User Experience Buyer's Guides

Voice of the agency: market value and growth

SAMPLE QUOTE

Catriona Campbell, Founder and Director, Foviance

"If you consider that so many agencies and integrators are now re-badging their design services as User Experience, the nominal growth rate is absolutely stunning. It's a very hot sector and everyone wants in."

SAMPLE QUOTE

4.1.1. Size of market compared to other online marketing channels

The size of the market can be compared to the following online channels and sectors:

- The SEO market grew by 16% in 2010 to a value of £436m, up from £376m in 2009.
- During 2010, the paid search marketplace grew by 18% to a value of £3.19bn.
- The UK market for email marketing platforms and services grew by an estimated 15% year-on-year to a value of £336 million by the end of 2010.
- Affiliate marketing drove £4.62 billion in online sales during 2010, a 12% increase on 2009 when the sector was responsible for £4.13 billion in e-commerce sales.
- The UK market for web analytics grew by an estimated 9% in 2009 to a value of £85 million.

4.2. Spending trends in different sectors

Spending on user experience is increasing across the board, but in terms of which industries are spending the most on user experience, financial services continue to invest heavily, as optimising the online experience is typically a core part of the banks' business strategy. With a large proportion of customers now banking online, optimising the on-site experience is crucial, not least in terms of gaining trust about security issues.

In addition, banks are providing intangible products, which require a high level of trust and buy-in by the consumer, so providing necessary and correct information on-site is essential, as Chris Rourke, MD of **User Vision,** notes:

Voice of agency: which companies are spending the most on user experience?

"We are benefiting from a marked increase in expenditure from blue chips, particularly those in the financial services, leisure and retail sectors – and in the latter case, most notably fashion retailers."

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5. Market Trends

5.1. Companies focus on strategy as market matures

SMEs, start-ups, and blue-chip companies are all investing heavily in user experience, but the focus differs depending on the size of the company involved.

For smaller companies (start-ups or SMEs), or those starting out in designing the user experience, the focus is on tactics, rather than strategy, in terms of making the site usable by optimising the sales and checkout processes. Companies starting out with one-off projects may have very specific objectives or goals.

Voice of the agency: is it getting easier to embed user-centred design within organisations?

Voice of the client : how do you currently see the user experience marketplace and how do you expect this to change?

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http://econsultancy.com/reports/user-experience-buyers-guide

Matthew Curry, Head of Ecommerce, Lovehoney

5.2. Companies recognise link between business performance and customer experience

There is now a greater focus on customer experience within the organisation, and on user experience as part of that. According to the Multichannel Customer Experience Report[1], published by Econsultancy in association with **Foviance**, almost half of company respondents surveyed (49%) said that a joined-up multichannel customer experience is very important to their organisation, and a further 41% said it is quite important.

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http://econsultancy.com/reports/user-experience-buyers-guide

[1] *http://econsultancy.com/reports/multichannel-customer-experience-report*

5.3. Humanisation of user experience online

As part of the drive to encompass user experience into the overall customer experience, the online environment has evolved to become more human. According to Simon Norris, Managing Director of **Nomensa**, emotional design will become more important:

Undoubtedly, humanisation of the user experience is driven broadly by the web becoming more social. The rise of social media has resulted in companies providing a more emotional user experience, by incorporating “social values” into the overall design of their website. These values include transparency, openness, and the ability to connect with the brand identity or company through a real person.

Voice of the client - How often do you engage in user experience testing?

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SAMPLE QUOTE

5.4. Return on Investment and benefits of best practice user experience

The potential return on investment and benefits of investment in user experience, usability and accessibility can be summarised as follows:

- **Increase sales by helping to drive the right user behaviour**.
  - Improved conversion rates.

Voice of the client: what are some of the benefits of investing in user experience?

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6. Strengths, Weaknesses, Opportunities and Threats (SWOT)

This section contains a 'SWOT' analysis of the user experience market from the perspective of the service providers specialising in these areas. It also serves as a summary of some of the points made above.

6.1. Strengths

- The majority of companies now understand the **benefits** of optimising the user experience, and the contribution to the bottom-line.

Voice of the agency: strengths

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Voice of the client: what do you think are the most exciting developments in user experience?

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http://econsultancy.com/reports/user-experience-buyers-guide

Matthew Curry, Lovehoney

6.2. Weaknesses

- Some companies still rely heavily on Flash, which makes it difficult for people with **disabilities or impaired vision** to access the site.

6.3. Opportunities

- More businesses are recognising the importance of **joining up the dots** and ensuring a seamless customer journey. Increasingly, there will be demand for services that provide a **multichannel user experience.**

6.4. Threats

- The economy is still **unstable**, and it is difficult to predict the outlook for the foreseeable future.

–

Voice of the opportunity: threats

SAMPLE QUOTE

Tom Wood, Foolproof

SAMPLE QUOTE

Dr Jon Dodd, Bunnyfoot

SAMPLE QUOTE

Paul Rouke, PRWD

SAMPLE QUOTE

Catriona Campbell, Foviance

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7. Costs and Pricing Models

7.1. Method of charging

Most work carried out by user experience agencies and consultancies is done on a project-to-project basis, where they calculate the amount of days needed and multiply that by their day rate.

However, there is anecdotal evidence of **an increase in the amount of retainer** work …

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8. Tips and Pitfalls

8.1. Introduction

As the user experience industry has low barriers to entry, competition for services is high. The sector has many agencies, large and small, claiming to offer user experience services, so it is imperative that clients select the agencies with the right mix of skills and knowledge.

Initially, companies need to determine who's who in the space, and which agencies are reputable. It is then about selecting the supplier who is the best fit for the company's individual needs and requirements.

Voice of the agency

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Dr Jon Dodd, Bunnyfoot

8.2. Does the agency have the right credentials and is it working to recognised standards?

The most important step for a buyer is to establish that the supplier has sufficient training and expertise to carry out work to the correct (and appropriate) standards. The profiles in this document outline which standards the companies adhere to and which bodies they belong to.

8.3. The right personality and cultural fit

As with any consultancy or agency, you will need to make a gut decision on the type of people who are the right match for your **organisational culture**. This is especially important if you want to build a longer-term relationship rather than looking for someone to carry out a one-off project.

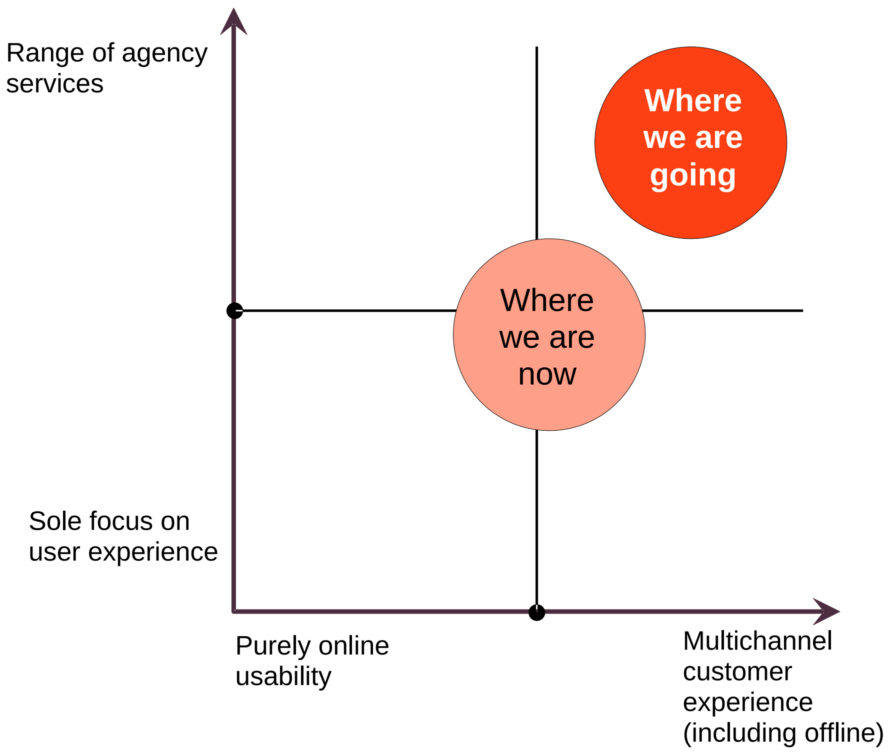
8.4. Getting robust results at an affordable price

The best companies charge broadly similar prices for their services, so strike the right balance between matching your own budget and getting results that you can trust.

9. Market Positioning Charts

9.1. Explanation for Chart 1 - Area of expertise

Chart 1: Area of expertise

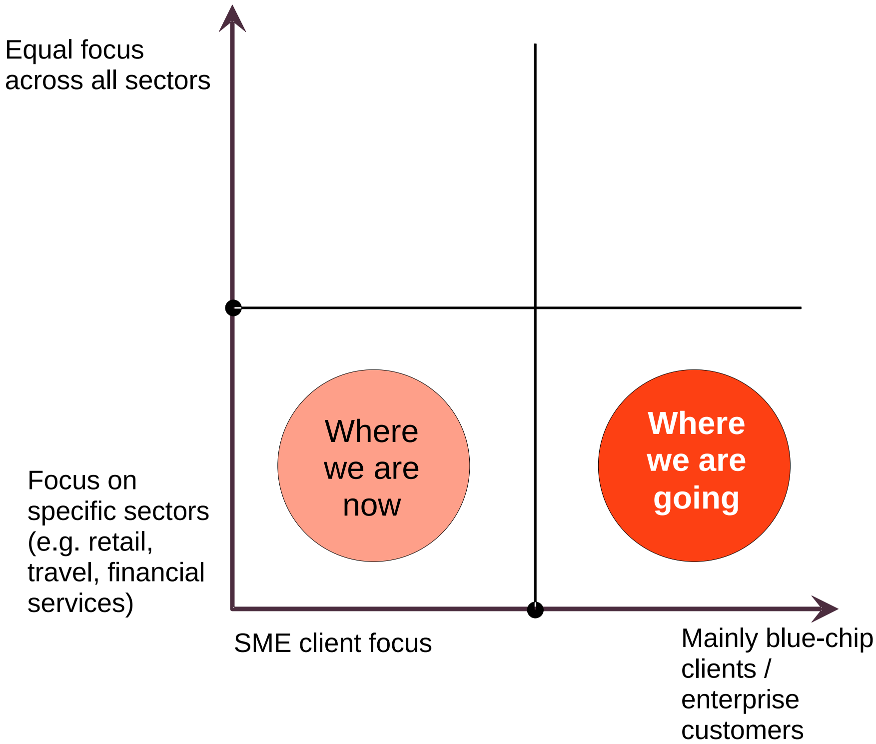


The **vertical axis** of this chart indicates to what extent suppliers featured in this guide provide a full range of agency services, compared to simply a focus on user experience alone.

The **horizontal axis** indicates whether the agency/consultancy sees itself as specialising in online usability, or whether their focus is on delivering multichannel customer experience across a range of channels, both online and offline.

9.2. Explanation for Chart 2 – Client focus

Chart 2 – Client focus

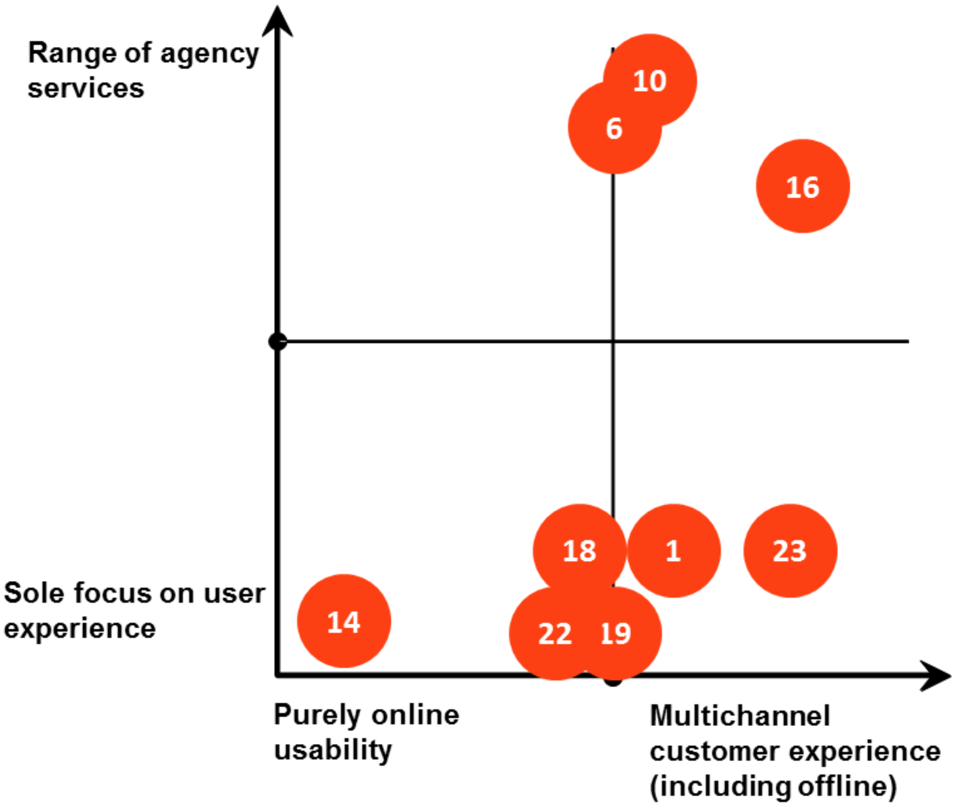


The **vertical axis** of this chart indicates whether the vendor has clients in a range of different sectors, or whether the agency focuses on delivering services to clients in particular sectors.

The **horizontal axis** shows to what extent agencies are focused on delivering services to mainly start-ups, small and medium-sized businesses versus a focus towards blue-chip and enterprise clients.

10. Supplier Positioning Summary

10.1. Area of expertise



1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27

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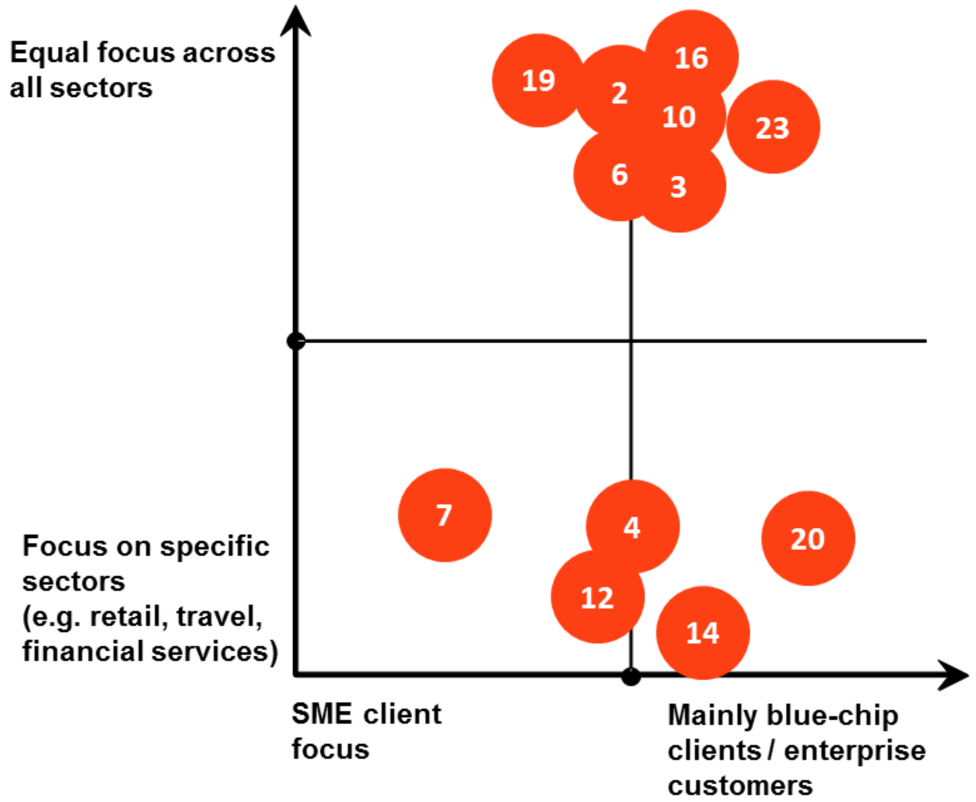
10.2. Client focus



1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27

11. Supplier Matrix and Company Focus

11.1. Matrix

An at-a-glance overview of who's doing what …

Supplier Matrix: **A fast guide to services**	Amberlight	Bunnyfoot	Clearleft	Cogapp	cxpartners	Experience Solutions	Flow	Foolproof	Fortune Cookie	Foviance	Human Factors International	Nomensa	One to One Insight	PRWD	RedEye optimum.web	Serco Experience Lab	Simple Usability	Spotless Design	Super User Studio	System Concepts	The Usability Lab	User Vision	Userfocus	we are: london	Web Usability Partnership	Webcredible	Your Mum
Types of Services Offered																											
A/B Testing and multivariate testing	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●
Accessible HTML coding																											
Accessible PDF tagging																											
Audit / Evaluation																											
Competitor Analysis																											
Competitor benchmarking																											
Consulting																											
Conversion optimisation																											
Customer journey analysis																											
Copywriting																											
Design																											
Field Research																											
Focus groups																											
Functionality and compatibility testing																											
Information architecture																											
Persuasion architecture																											
Prototyping																											

Training																											
User testing																											
Web analytics																											
Internet																											
Intranet																											
Interactive TV																											
Mobile devices																											
Kiosks																											
Tablet devices																											
Consoles																											
Gaming																											
Desktop applications																											
In-house testing Lab																											
Mobile lab																											
In-house eye tracking																											
In-house viewing																											
Wireless devices cameras																											
Picture-in-picture recording																											
Project-by-project																											
Retainer																											
Success-based fees																											

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11.2. Service provider focus: services and platforms

Company	Top Services (by revenue)	Top Platforms (by revenue)
Amberlight	1. Lab-based qualitative research (50%) 2. SAMPLE 3. SAMPLE	1. Mobile (60%) 2. SAMPLE 3. SAMPLE
Bunnyfoot	•	•
Clearleft	•	•
Cogapp	•	•
cxpartners	•	•
Experience Solutions	•	•
Flow	•	•
Foolproof	•	•
Fortune Cookie	•	•
Foviance	•	•
Human Factors International	•	•
Nomensa	•	•
One to One Insight	•	•
PRWD	•	•
RedEye optimum.web	•	•
Serco Experience Lab	•	•
Simple Usability	•	•
Spotless Design	•	•
Super User Studio	•	•
System Concepts	•	•
The Usability Lab	•	•
User Vision	•	•
Userfocus	•	•

Company	Top Services (by revenue)	Top Platforms (by revenue)
we are: london	•	•
Web Usability Partnership	•	•
Webcredible	•	•
Your Mum	•	•

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12. Supplier Marketplace and Profiles

12.1. SAMPLE COMPANY

SAMPLE COMPANY

http://econsultancy.com

Company Proposition

Brief Company History

What three areas are you focusing on most closely this year?

Day rates (range).

Number of UK employees

Number of UK practitioners

UK HEAD OFFICE ADDRESS

OFFICE LOCATIONS

N/A

CONTACT

CLIENTS

COMPANY 1

COMPANY 2

SECTOR SPECIALISATION

Company Information	
Turnover 2010	
Projected growth for 2011	
Projected turnover 2011	
Top services (by revenue) with % for each	4.
Top platforms (by revenue) with % for each	5.
Background Information	
Years in business	
Professional background of company founder(s)	
International capability	
Company links with academia	
White papers/published documents	
Membership of industry bodies/Professional associations	
Standards complied with	
Partnerships with other companies	
USP	
What sets you apart from your competitors?	
Clients	

UK client list	
Testimonials	
Case study	
Recent case study	
Project management	
Please briefly outline your capabilities and resources in this area.	
Type of services offered	
A/B Testing and multivariate testing	
Accessible HTML coding	
Accessible PDF tagging	
Audit/evaluation	
Competitor analysis	
Competitor benchmarking	
Consulting	
Conversion optimisation	
Customer journey analysis	
Copywriting	
Design	
Field research	
Focus groups	
Functionality and	

compatibility testing	
Information architecture	
Persuasion architecture	
Prototyping	
Training	
User testing	
Web analytics	
Other (please specify)	
Platforms / devices	
Internet	
Intranet	
Interactive TV	
Mobile devices	
Kiosks	
Tablet devices (e.g. iPad)	
Consoles	
Gaming	
Desktop applications	
Other (Specify)	
Facilities	
In-house testing lab	
Mobile lab	
In-house eye-tracking	

In-house viewing	
Wireless device cameras	
Picture-in-picture recording	
Other (Specify)	•
Charging models	
Project-by-project	
Retainer	
Success-based fees	
Additional supporting information	
Novel methods or approaches	

SAMPLE COMPANY – Market Positioning Charts

Chart 1: Area of expertise

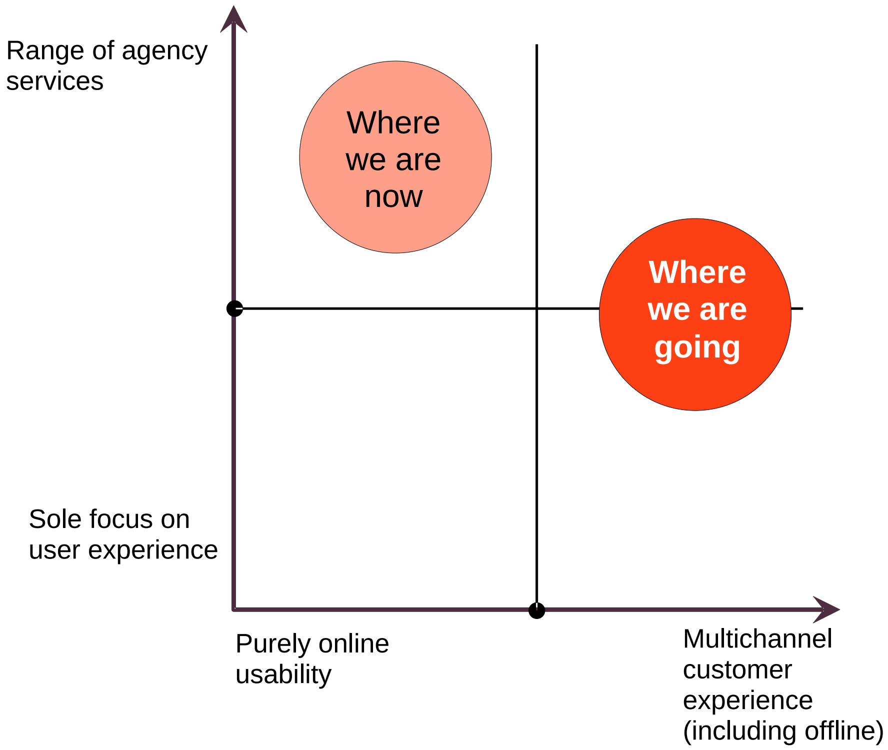

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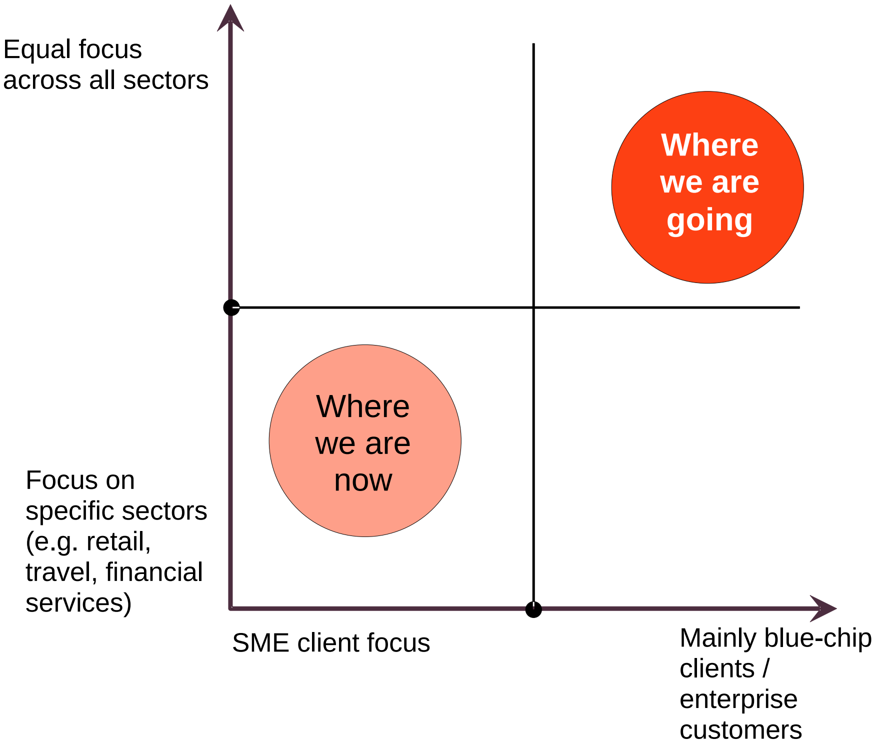
Chart 2 – Client focus



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