

A GUIDE TO RECRUITING USERS FOR SENSITIVE RESEARCH

Following a couple of specialist projects, we thought it would be useful to put together a guide outlining how to approach user recruitment when working on research about sensitive topics, or if you are concerned you might need to speak with vulnerable participants.



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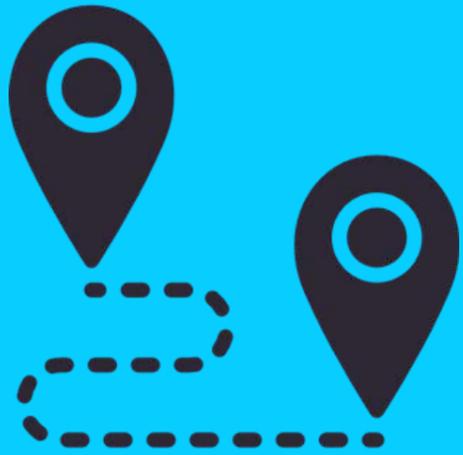
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INTRODUCTION

As specialist participant recruitment experts for the user experience (UX) industry, People for Research regularly recruit for the public sector or charities. This often involves recruiting participants who would be considered vulnerable as part of digital transformation projects of essential public services. Also, we regularly recruit for research on sensitive subjects, or things which are of a highly personal nature.

Some of the projects we have been working on over the last couple of years have included:

- Recruiting participants who have received bereavement support after losing a loved one
- Recruiting participants who have considered suicide, or those who have experienced mental health issues
- Recruiting participants suffering with medical conditions such as arthritis, dementia, Alzheimer's, eczema, or the consequences of a stroke
- Recruiting friends and family members of participants who have suffered with various health conditions
- Recruiting participants who have accessed essential Government services, such as going through a tribunal, court proceedings, requesting social care support, and more



TOP TIP

"Ultimately, it is about empathy and how trust is built."

Ellie Wynn, Project Manager at PFR
[Click here to read our latest case study](#)

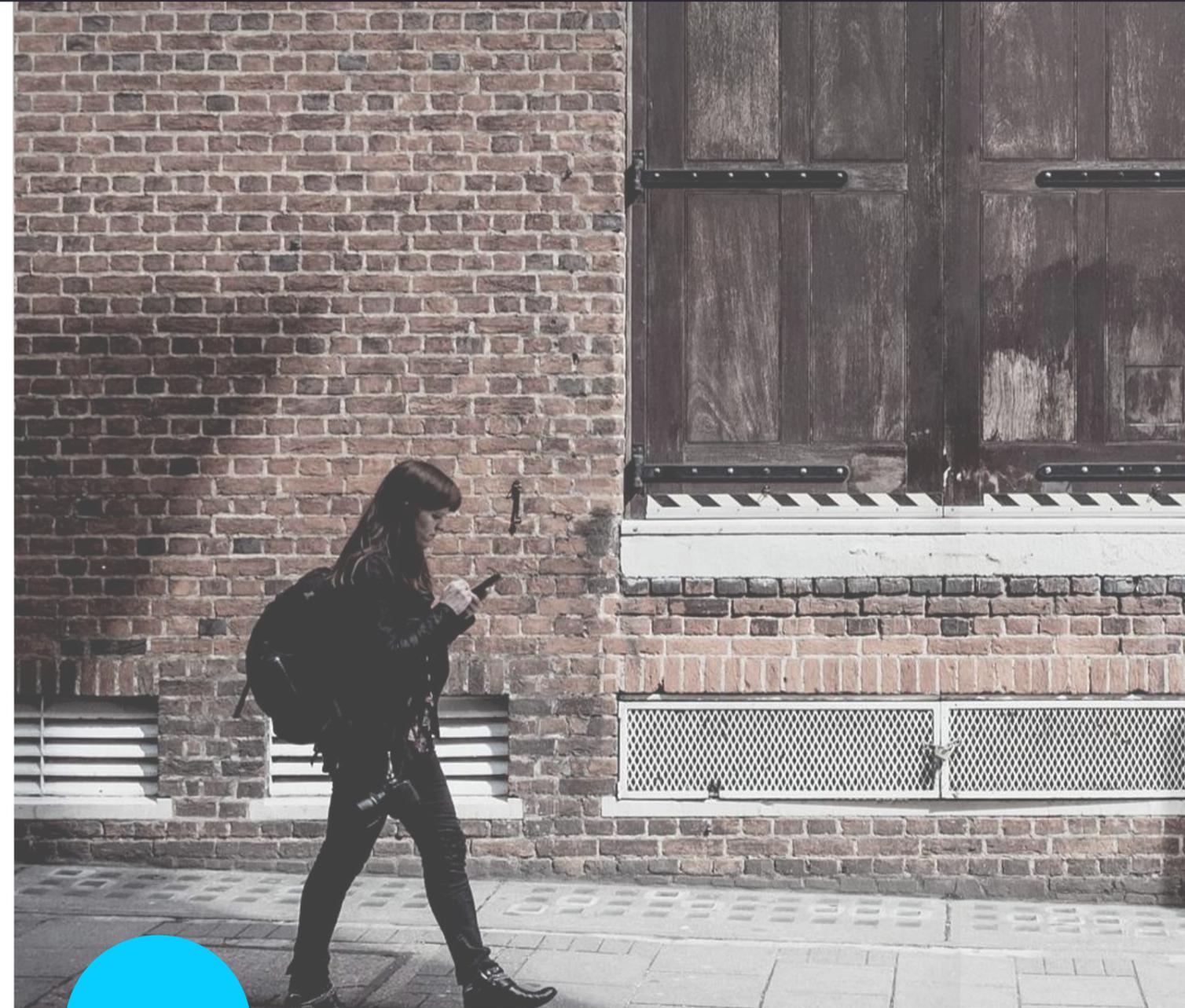


IDENTIFYING YOUR AUDIENCE

When identifying the participants you would like to include in your research, consider if it is appropriate to invite your core service users to take part in the sessions. For example, on a recent project for a charity who supports people with conditions such as Alzheimer's disease, we advised the client it would not be possible to include participants with advanced Alzheimer's.

Top tips:

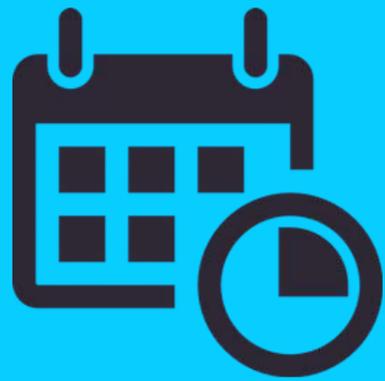
1. Be mindful about whether these participants will feel comfortable sharing the information you will be asking for.
2. Will it be possible to get informed consent before including the participant in the research?
3. Consider what is the next best option in case it is not possible to recruit potential users. For example, can you include friends and family members of those affected?
4. If **recruiting your own customers**, make sure you allow them to opt in to the process, and always be transparent about what you are asking them to get involved with.
5. If using an external recruitment partner, **write a recruitment brief** and share it with them.



FACT

"Getting the brief right is the first step towards a seamless recruitment process."

Jess Lewes,
Business Development Director at PFR



PLANNING RECRUITMENT

When running user research or usability testing with a specific audience, it is more important than ever to actually add time for recruitment to your overall project road map.

If you are recruiting yourself, a good rule of thumb is to allow one full day for each person you would like to recruit. So, if you are recruiting 12 participants, it will probably take you 12 full days to source, screen, and book each person.

Remember this:

1. Allow more time than you expect, even if working with a specialist recruiter.
2. Consider how you will communicate with the people you want to include and write targeted content.
3. If naming your company, or your client's company in the research, request support from the marketing team to make sure you are using the right tone of voice.
4. Always start with an email to introduce the research and allow participants time to digest what you are asking them.
5. As with the [recent case study we wrote](#), be as flexible as possible to work around the participants.
6. **Write a screener** that will help you identify participants.
7. Walk the participants through the arrival experience at your chosen research venue and send them clear instructions. Consider changing the venue if your office is quite intimidating to vulnerable people.



TOP TIP

"Analyse your pool of available participants versus the users you need to recruit for the project and plan your recruitment strategy."

Owain Johns, Project Manager & Studio Manager at PFR



DURING RECRUITMENT

Once you have planned how to recruit and planned the day of research – for example, once you have picked a venue and decided on time slots –, it is time to commence the recruitment.

Participants should know you are going to be calling them, and will hopefully be ready to answer any questions you may have. Still, allow the participant time to reflect on what you discussed before you confirm they are happy to be included. This is part of getting informed consent.

Top tips:

1. Call participants at times that are suitable for them. For example, teachers won't be able to speak during lesson time and accountants are unlikely to be available in busy months like January.
2. When you have recruited participants, send out clear guidelines explaining where to go and how to find the research venue.
3. Consider sending follow-up details closer to the time, or call the participant the day before to answer any additional questions they might have.
4. Let participants know what to expect and consider sending out any necessary paper work such as non-disclosure agreements (NDAs) to participants ahead of the research, so they have time to read through and ask questions.



OPINION

"The research went very well. I felt good and would be happy to do it again. It was refreshing to be treated like a human being!"

**Crispin, member of the PFR
online community of participants**



WHAT TO REMEMBER ON THE DAY

Just as planning the recruitment, make sure you think through the day of research too.

Often, people who are classed as vulnerable participants won't have taken part in user research or usability testing previously, so consider how they might be feeling when they arrive at the research session.

Follow these steps:

1. Give participants a number to call on the day in case they are running late or need directions.
2. Make sure a member of the research team can meet and greet participants, especially if you are based in a big office block and the first person they meet is not someone working for your company.
3. Offer them a drink on arrival, it will help the participant to feel welcome.
4. Remind the participant about the nature of the research. Tell them what will happen during the session and remind them that they don't have to answer any question they don't feel comfortable with.
5. Remember that some participants may need to bring along a carer or support person to the research session, so make sure you have an extra chair ready!
6. Make sure you have a box of tissues to hand if you are running research with users who have been through a tough personal situation such as bereavement.



TOP TIP

During the research or testing session, allow people time to think. **Watch this video** by Steve Portigal on the power of silence.



POST RESEARCH

Depending on the subject matter of your research, and who recruited the participants, sometimes it is nice to follow up with anyone you were unable to include in the research to thank them for coming forward and sharing their story.

This is a particularly good thing to do when recruiting from a customer list, and you can find more tips about this and other topics on the People for Research blog.

Summary:

Lots of people are on board with making design user-centred; now let's make research user-centred. Consider the user's journey and experience when it comes to taking part in your research or testing, and you will see attendance rates improve and the quality of your research improve.

Useful links:

- [Click here](#) to read the Market Research Society guide on participant vulnerability and things to consider about your research project as a whole.
- James Chudley from cpartners has put together a [User Research Checklist](#), which covers anything else a user researcher might need to prepare for research or testing.
- PFR recently supported an independent research study by a company called People Thinking. The result of the research was a [workshop at UX Bristol conference](#) about the journey of a participant taking part in research.



For more tips or help with recruiting users of any kind, get in touch with People for Research today:

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