

User Research Methods: Types, Patterns, and Examples

- Method choice drives better product decisions and reduces risk
- Covers method families, selection patterns, and real-world case studies
- Success means matching the method to the decision, not the reverse
- 2026 landscape: AI-assisted workflows and democratized research are baseline



The Core Decision: Generative vs. Evaluative



Generative research discovers the problem when the team is uncertain



Evaluative research tests a specific design or hypothesis against a solution



Running evaluative methods before understanding the problem is the top mistake



Five questions narrow the method menu before selecting anything

Three Organizing Dimensions of Research Methods



- Attitudinal vs. behavioral: what people say versus what they do



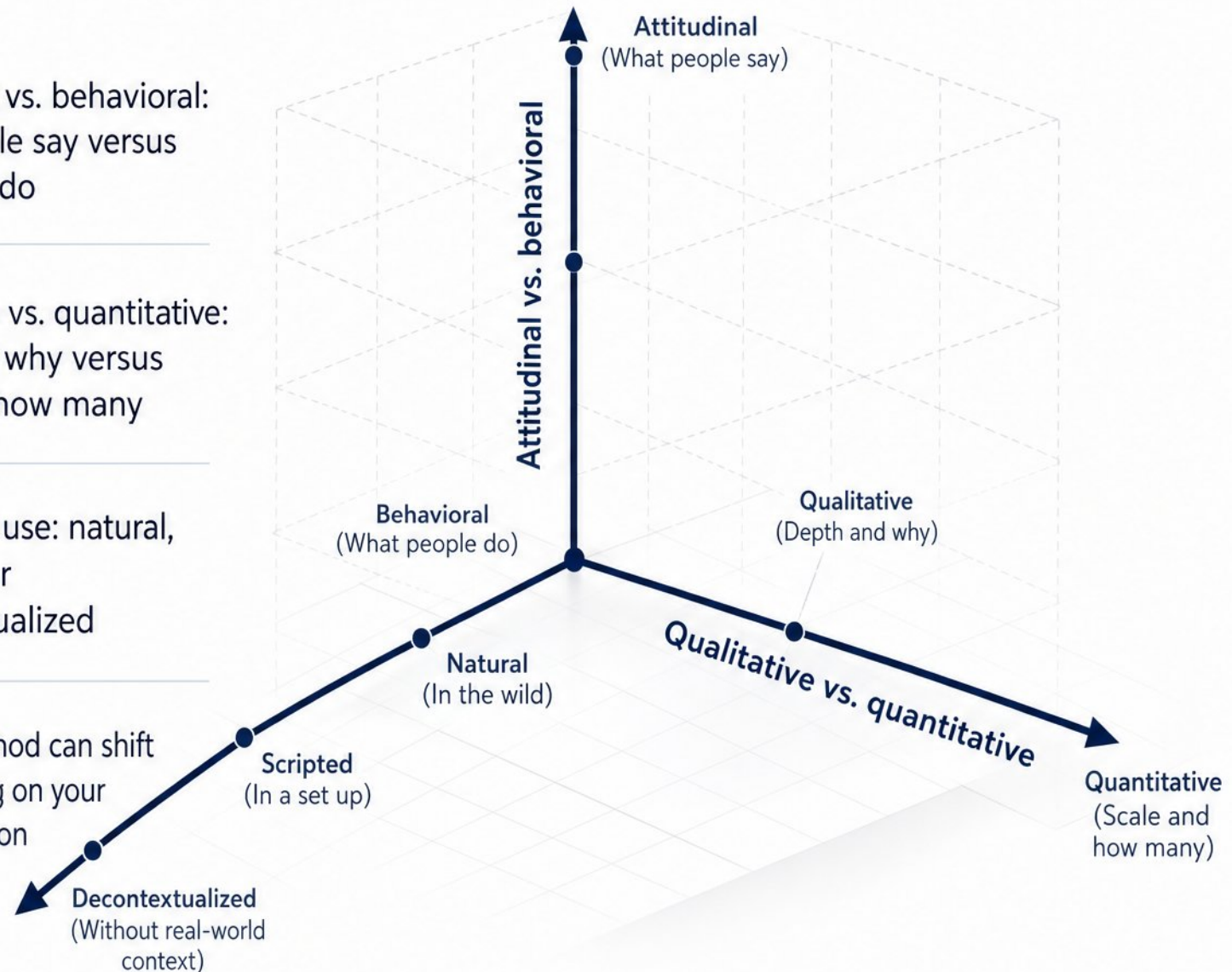
- Qualitative vs. quantitative: depth and why versus scale and how many



- Context of use: natural, scripted, or decontextualized



- The same method can shift cells depending on your research question



Generative & Discovery Methods



- Field studies observe real behavior in natural environments



- Contextual inquiry adds in-the-moment questions to observation



- Diary studies capture experiences unfolding over days or weeks



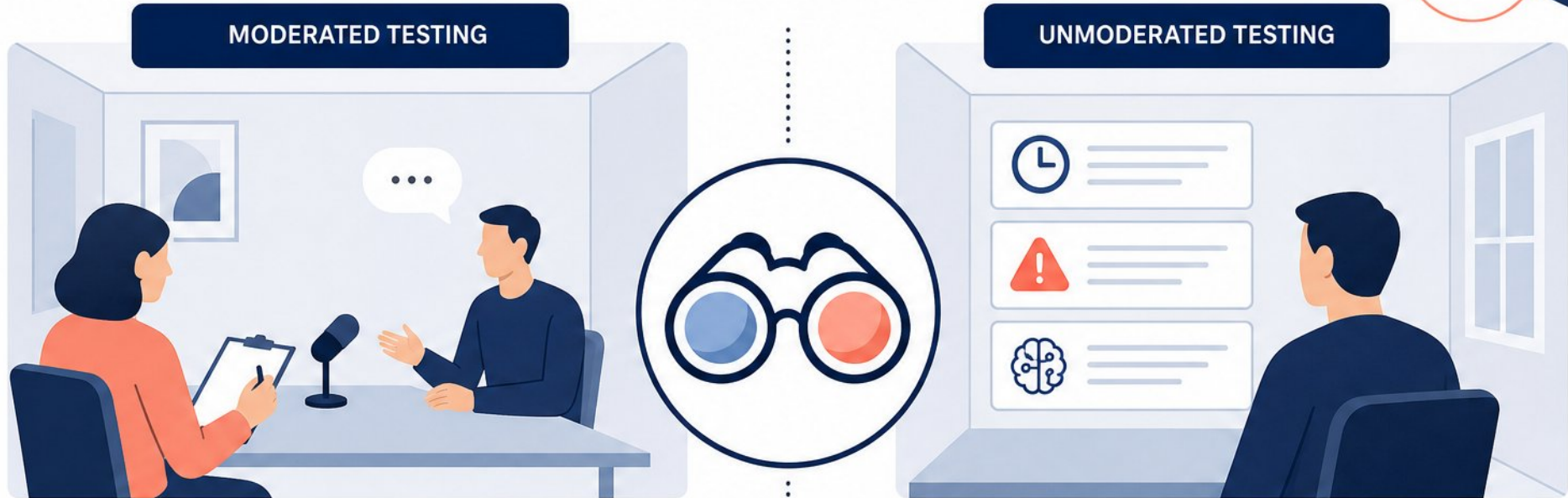
- Exploratory interviews reveal motivations and mental models



- Start broad, then narrow hypotheses as themes emerge



Evaluative & Usability Methods



- **Moderated testing** reveals the 'why' through real-time follow-up and probing



- **Unmoderated testing** measures behavior at scale with speed and lower cost



- **Common metrics:** task success, time-on-task, error rate, SUS, and SEQ



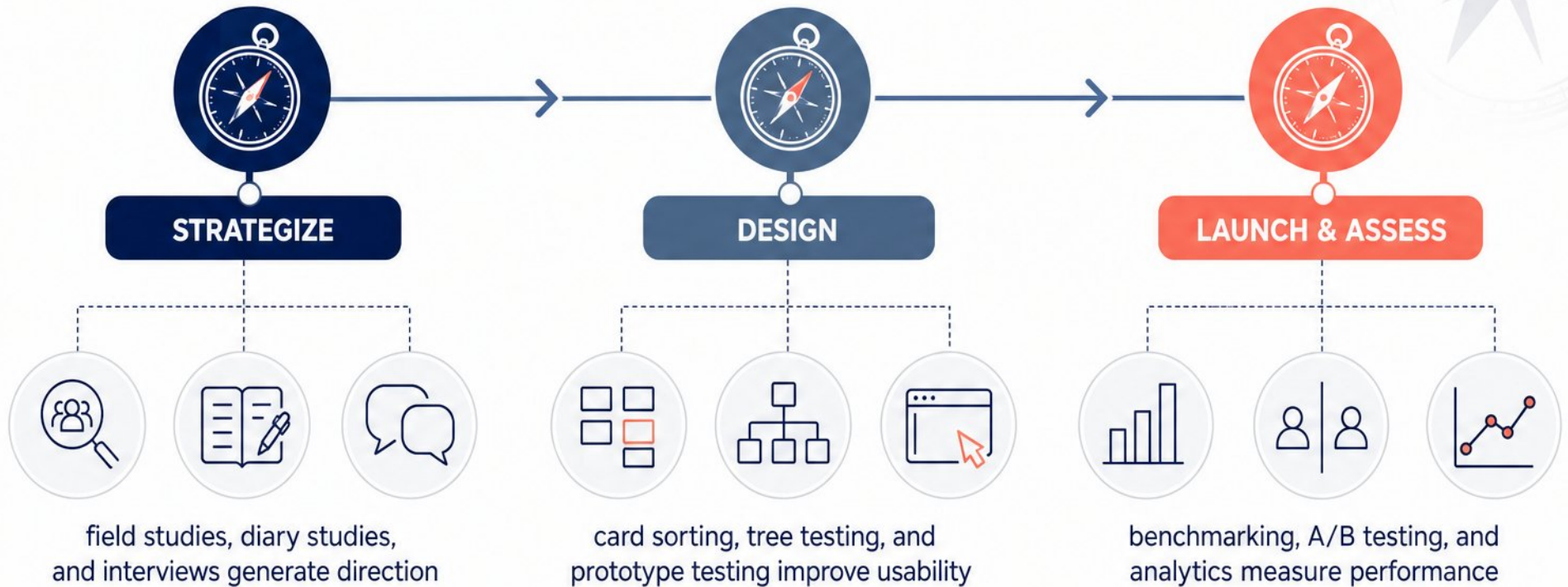
- **AI-moderated testing** sits between the two for high-volume validation with structured probing

Behavioral, Attitudinal, and Hybrid Patterns

- - Say-do gap: self-reported past behavior is often inaccurate
- - Attitudinal methods capture beliefs, preferences, and reactions
- - Behavioral methods capture observable actions and real choices
- - Hybrid pattern: analytics shows what, interviews explain why
- - True mixed methods answer one question from complementary angles



Choosing Methods by Project Phase



Fidelity of research insight follows fidelity of design



Name the decision the research must inform before choosing a method

Common Trade-offs and Anti-Patterns



- **Speed vs. depth vs. confidence:** you cannot maximize all three



- **Sample size check:** 5-8 for usability, 8-12 for interviews, hundreds for surveys



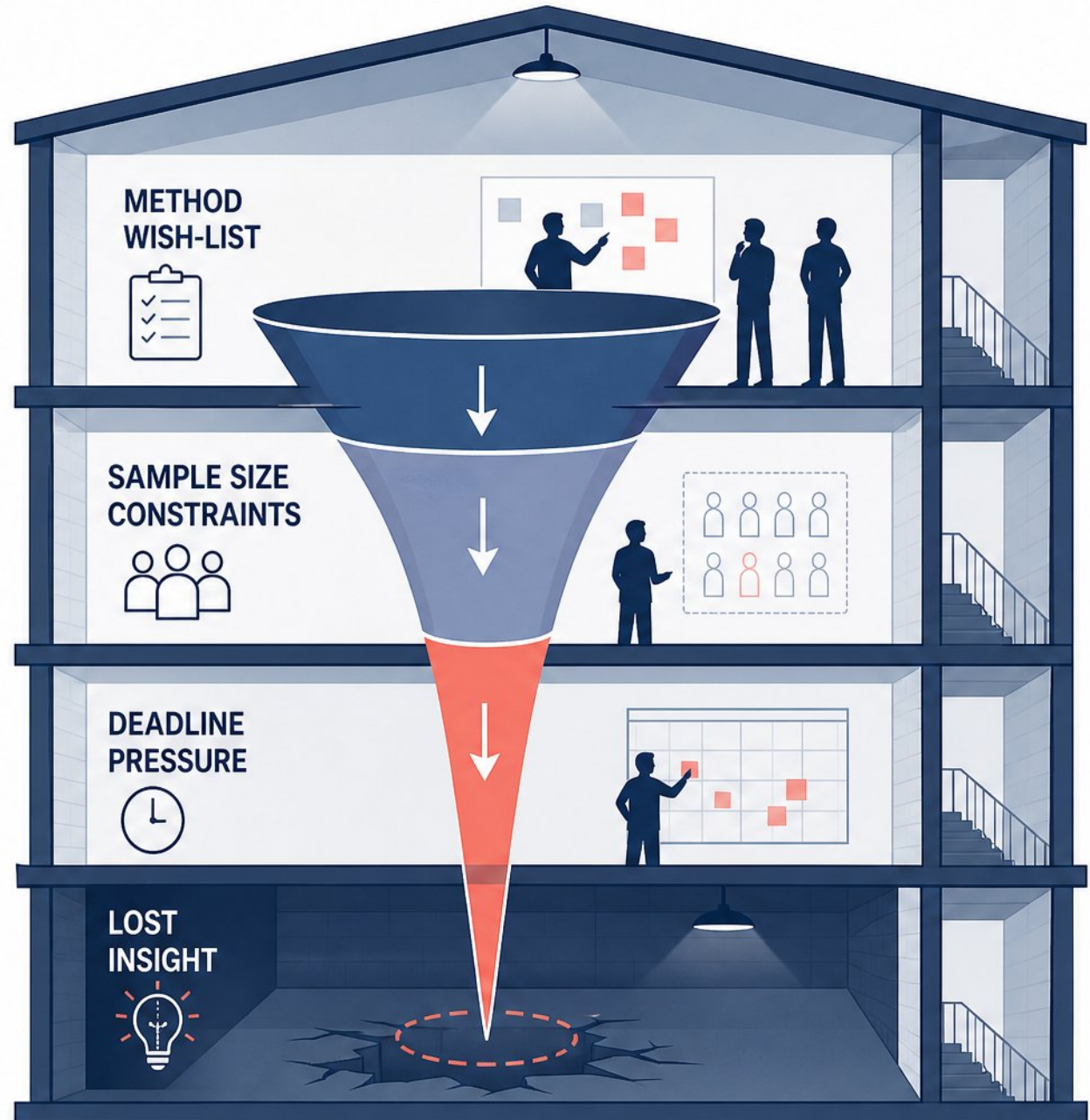
- **Anti-pattern:** choosing the method before defining the decision



- **Anti-pattern:** treating attitudinal data as a predictor of real behavior



- **Anti-pattern:** research that arrives after the decision is already made



Real-World Pattern: Affirm's Quantitative + Qualitative Benchmarking



- 1,500-participant study across 75 cohorts with real financial transactions



- Paired quantitative benchmarking with qualitative "why" capture



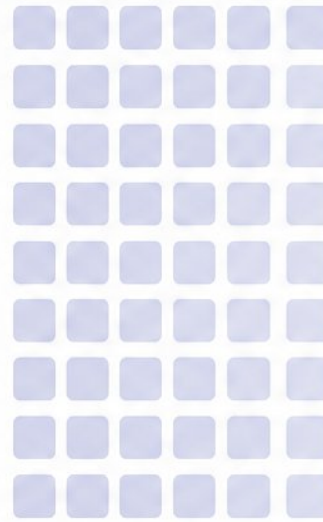
- Drip strategy: shared insights throughout the study, not only at final readout



- Result: a living research asset used across product, design, and sales

Affirm 1,500-participant study

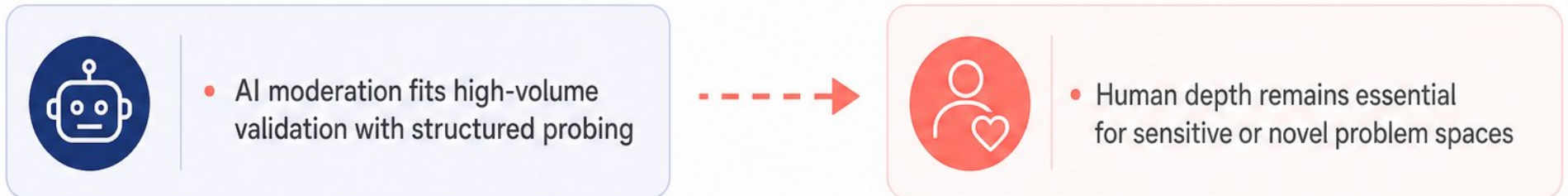
75 cohorts



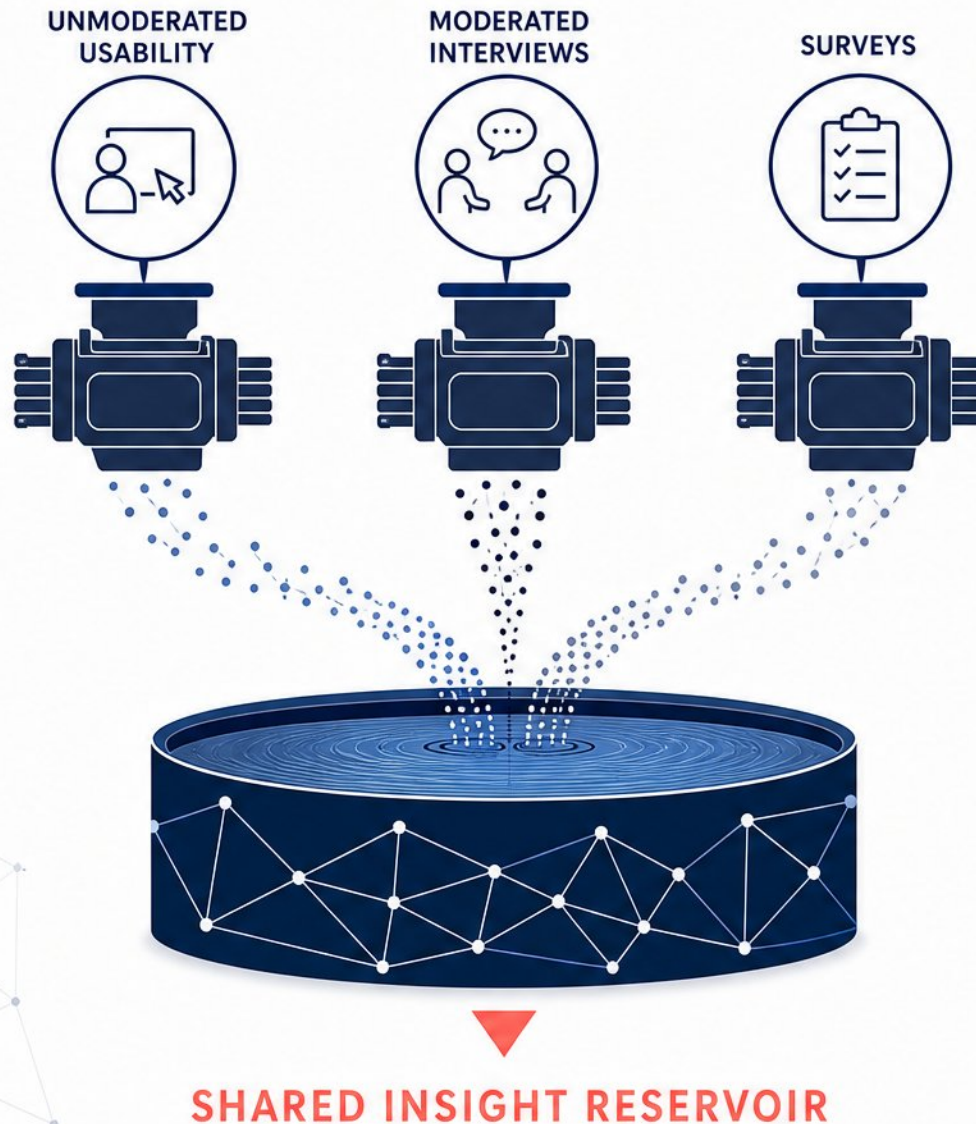
Qualitative "why" capture



Real-World Patterns: Speed, Scale, and AI Moderation



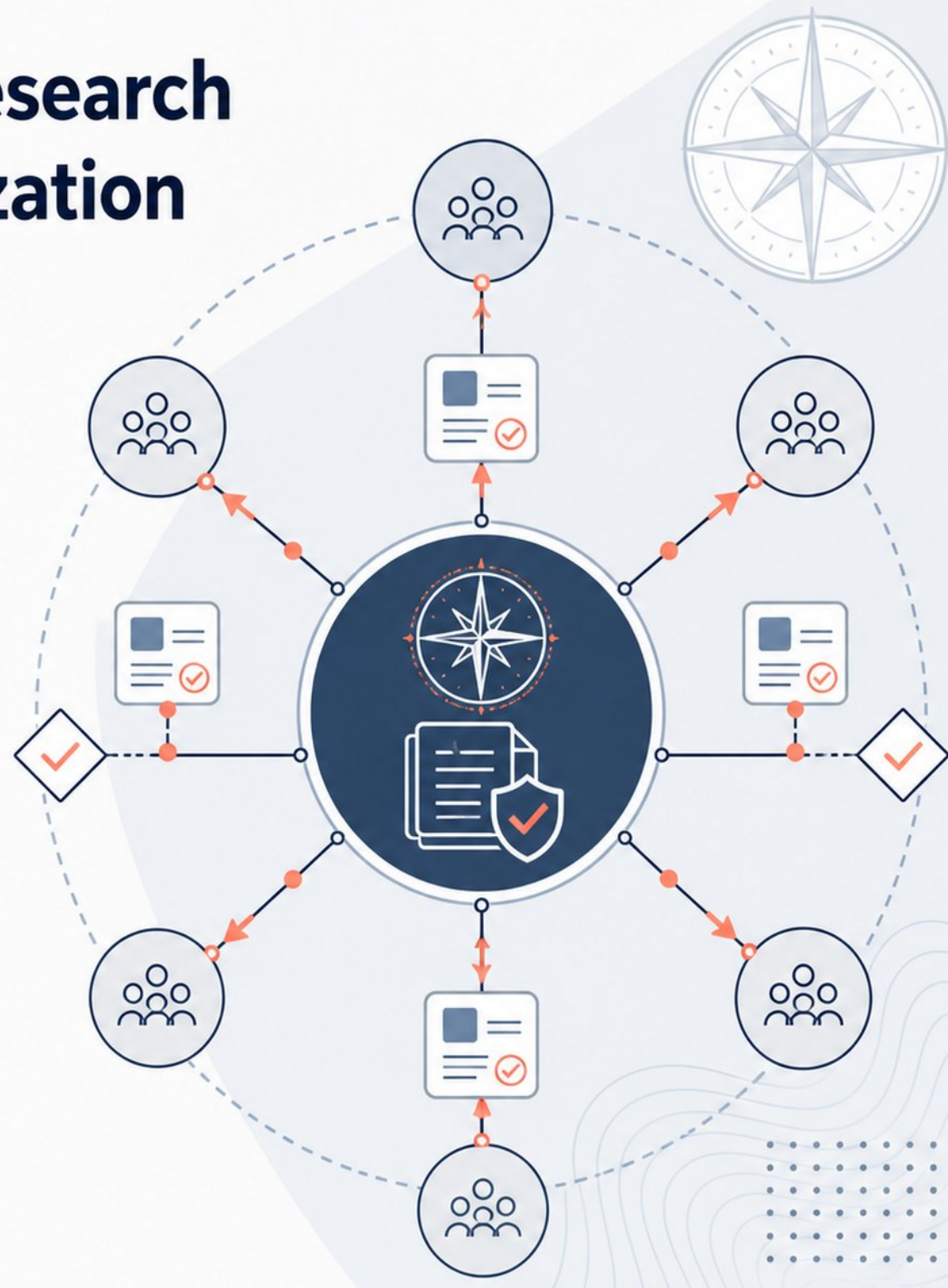
Real-World Patterns: Mixed Methods in Consumer and Luxury Contexts



- **Canada Goose:** unmoderated usability + moderated interviews + surveys, run in parallel
- **Ciklum:** 557 participants, two phases, five evidence-based personas built
- **Armani:** qualitative observation + eye tracking, global markets, prioritization matrix
- **Common thread:** method selection tied directly to specific product decisions

Scaling Methods: Research Ops and Democratization

- ResearchOps is the scaffolding: repositories, panels, templates, governance
- Hub-and-spoke: central team owns standards, product teams run studies
- Guardrails that work: approved templates, pre-study review, quality gates
- Tiered democratization: low-risk tactical studies vs. specialist-only high-stakes work
- 2026 reality: 39% of research is conducted by non-researchers



Building Reusable Method Patterns and Playbooks



10-15 common study templates cover 80% of demand



Five core docs: screener, discussion guide, consent, debrief, brief



Repository standards make prior research searchable before starting



AI guardrails enable consistent moderation and aided synthesis



Measure outcomes: studies shipped, decisions influenced, cycle time

STUDY PATTERN LIBRARY



Applying Methods to Your Next Study



- Start with the decision, then select the method



- Use the worksheet: generative vs. evaluative, depth vs. scale



- Peer review and pre-study planning checklist



- Log deviations and keep a decision log for skipped research



- Continue learning: NN/g, ResearchOps community, tool-specific resources

DECISION-FIRST METHOD SELECTION WORKSHEET



Start with the decision

Clarify the question and desired outcome.



GENERATIVE



Explore the problem space, discover needs, and generate insights and ideas.

EVALUATIVE



Test and validate solutions, assess usability, and measure effectiveness.

CONSIDER CONSTRAINTS



DEPTH

How deeply do we need to understand?



SCALE

How many participants or data points?



TIME

What timeline are we working within?

PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/1088e5f9/public