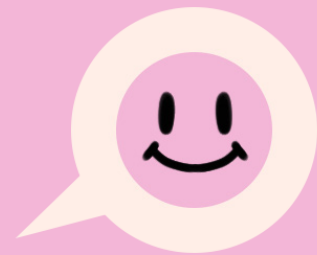


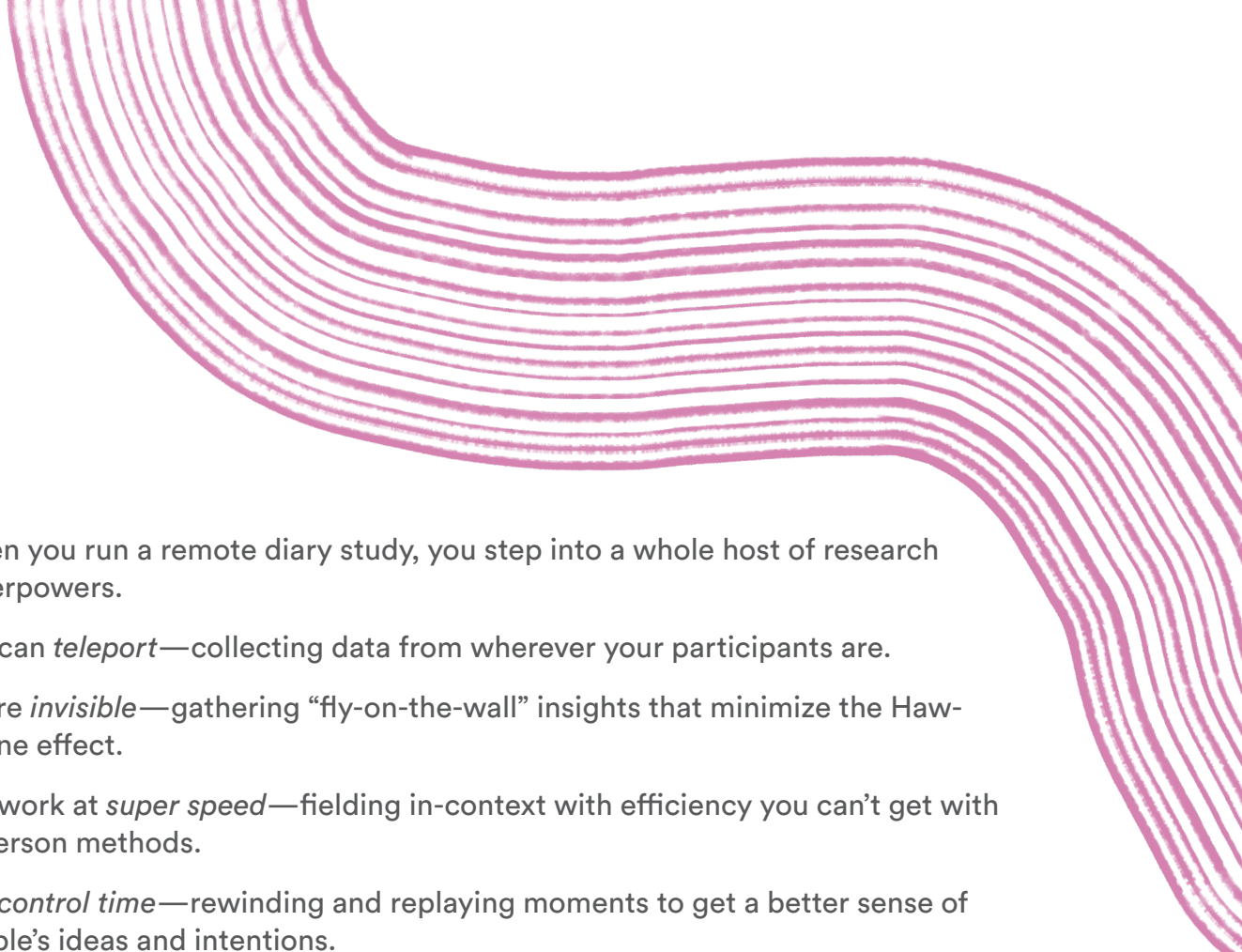
 dscout



How to Conduct an Insightful Diary Study:

The Complete Guide





When you run a remote diary study, you step into a whole host of research superpowers.

You can *teleport*—collecting data from wherever your participants are.

You're *invisible*—gathering “fly-on-the-wall” insights that minimize the Hawthorne effect.

You work at *super speed*—fielding in-context with efficiency you can't get with in-person methods.

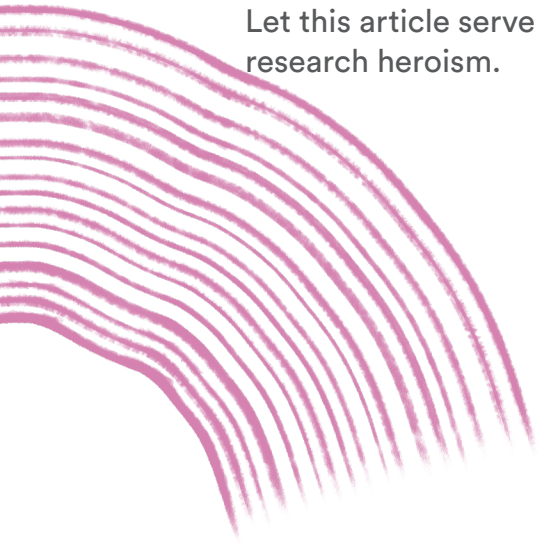
You *control time*—rewinding and replaying moments to get a better sense of people's ideas and intentions.

And your insights are imbued with *super strength*. The data collected is rich, personal, and often multimedia—which makes it particularly impactful for your stakeholders.

In a word: diary studies are *powerful*. So why aren't they run more often?

It's largely because in the past, they were a lot of work. And the resources required to run a diary study right *used* to be as draining as a radioactive spider bite.

Luckily, new tech has made running a diary study significantly less painful. Let this article serve as the cinematic training montage between you and qual research heroism.



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What is a diary study?

Technically: A diary study is a contextual, qualitative, longitudinal research methodology used to capture user behaviors, activities, and experiences.

But wow, is that a mouthful.

So less technically: Diary studies take place over time and offer insight into people's day-to-day lives. They're researcher prompted and user generated—meaning your participants follow your instructions and show you their experience in their own words.

Originally, they were done with a cultural probe. First, by sending literal notebooks to participants, giving them prompts, and having them write “diary” entries that they would mail back to the research team. Later on, some researchers would send out camcorders and disposable cameras.

A lot has changed since then, but diary studies are used more or less in the same way. They're a great way to observe behaviors and experiences over time, and to collect some pretty intimate qualitative insights outside of a “formal” research setting. And they're one of the best methods to date for capturing data in the moment and in context.

Why should I run a diary study?

Diary studies are more than just a “poor man’s field study.” They’re now easier to run quickly, and at scale.

And once you’re up and running, you’ll notice the methodology offers some unique advantages.

“Be there” (without having to actually be there).

Diary studies allow participants to log their experiences in their own time. Just as importantly, they allow you to review the participants’ entries in real time, or on your own time. Participants can note a thought when it’s most relevant to a prime or trigger you’ve created, and you can look it over whenever it’s convenient. This means you get closer to the moment, without having to block off your schedule (or plan travel, or source site permissions, or transcribe field notes, or organize in-field-capture-tech, or hire people to do all of the above). Plus, you can get a more geographic representation of your sample, which is increasingly important in our global business environment.

Minimize the bias of “over-the-shoulder” observation.

Let’s say you have your dream research budget, timeline, and capacity. You can go out to the field, follow your participant around, observe their day-to-day life, take notes, ask questions, and be “where the action is.”

Do you think your participant behaves the same way as they would when they’re alone?

Diary studies allow you to mitigate the Hawthorne effect and act as more of a “fly-on-the-wall.” They simulate a more personal or intimate relationship between the participant and the study prompts than found with other methodologies.

If the purpose of social research is to learn about *natural behavior*, diary studies allow you to get out of the way and capture natural behavior, straight from the mouth (and mind) of your users.

In an important but “less tactical” sense, diary studies encourage self-discovery among your participants. As the result of continued monitoring, participants generally end a study better informed to reflect about their feelings, habits, and behaviors.

“With [a discount Diary study], you’re really getting the moment in context. You see real stuff going on. People are submitting videos from the bathroom, just out of the shower, or lying in bed at night. It’s very real and very intimate.”

— Jasmine Hentschel • Steady

Trends are only trends if they exist over time, and at frequency.

Yes, you can ask how I feel about my finances in an interview session. But you’ll get a very different response on payday than you will when my bills are due. If last week I had to pay to replace a part on my car, I’ll feel worse than I will at the end of the year, when I ask for a raise.

Diary studies are easy ways to see behavior over time, and to suss out the whole picture.

Plus, your ability to scale a diary study lends you additional data points. This increases your reliability, which (should) increase your confidence in the insights and conclusions you draw. More points along the same theme = more confidence it’s a “real” thing.

When might a diary study be a good fit?

- **You're curious about micro-moments and interactions that affect "big decision making."** If you want to know what pushes people toward a big change (e.g., "We're moving!" or "We need to buy a car"), that's hard to get at with a focus group or interview. A longitudinal diary study can surface the minor moments along the way, which add up to a major choice.
- **You want to see a diversity of experiences, and learn how behaviors or perceptions change.** Observing the same set of participants over the course of days or weeks allows you to track how different events, moments, and moods impact decisions. It can demonstrate how quickly they can learn a new system, product, or skill. It can teach you more about customer loyalty over time. It can expose habits that govern their day-to-day lives (rather than just explain how they feel on a particular Tuesday).
- **You're worried direct observers would influence behavior.** If the activity you're trying to understand is more private, sensitive, or difficult to talk about, having a "barrier" between researcher and participant might actually prompt more transparency. Imagine trying to talk about mouth sores, condom preferences, chronic pain, or substance use with a group of strangers. Not even the most effusive moderator can create an environment of comfort and candor when the topics are that personal.
- **You want to know more about what motivates someone to act.** Why did someone order an Uber, rather than taking the train? How were they feeling when they decided to stop in for a cup of coffee? Depending on the length of a diary study, you can get a lot closer to the nuanced thoughts and attitudes that impact decisions in the moment. That sort of nuance that quickly fades from our memory upon reflection.

- **You want to know about behaviors that happen sporadically.** Many of our activities don't happen on a set schedule. If you want to learn how or why users do non-daily, non-trend-based activities, a diary study might get you a more robust data set. For example, you might want to know more about moments when people worry about their children, listen to audio content, or browse for decor inspiration. With a contextual inquiry or an interview, you'd only get a narrow glimpse into these experiences. With a diary study, you'll get more context—whether it's an activity that happens “once in a while,” or 10 times in a day.
- **You want to reach more sensitive populations, where direct observation isn't an option.** Sometimes this has to do with access, geography, and privacy. Sometimes it just comes down to the behavior of your target participants. Let's be honest. Teenagers probably don't want to talk to you, but they might record a note on their cell phone.
- **You are busy.** Sometimes (or often) you have a lot going on. Diary studies are “crock pot” method research: Just set up the parameters, and forget about it for a while. Get working on a more immediate question, and check in to make sure your participants are engaged. In a few days (or weeks, or months) you'll have a wealth of data ready for examination.
- **You want a straightforward way to make an impact with your stakeholders.** You can't usually bring company decision-makers into the field with you. But you can rely on video data to make your users' thoughts and needs feel “real.” Diary studies collect moments over time, which tells a story and is often more personal—and more human—than other methods of qualitative data collection.

“We asked 180+ leaders to watch an hour-long highlight reel. To our astonishment, every leader came to the summit intimately familiar with all the different customer reactions and perspectives. Attendees were even using the names of research participants they connected most with. It was a game-changing moment! Everyone who watched this video effectively fell in love with these customers and became energized by them.”

— Matthew Doty • Best Buy

And when should I consider a different methodology?

- **You have a more straightforward usability question.** If you just want to know “Does this work or glitch?” a usability test might get you the answer you need. But if you want to know “Why are people hacking this feature?” or “What do people really need from this product?” generative research or a diary study might get you more context.
- **You need insights, like, yesterday.** There are a lot of ways you can shorten up a longitudinal study’s timeline, but there’s no way around it: Diary studies take a while to run, and they generate a lot of data. This is good for diving deep into participant behavior, and less good for turning around findings within a 48-hour window.
- **You have a (very) limited budget for recruiting.** This is less the case if you’re using a specific diary study tool that includes recruiting. But diary studies are involved. They require engaged recruits (and therefore a bit of a budget). You may get hundreds of 5-question-survey submissions with the promise of a Starbucks gift card. But for a meaningful longitudinal study, you’ll need to find the best-fit people, and pay them fairly for their time.

Tell me how this works

We have a lot of thoughts on how to run a diary study the right way. But rather than just throwing you some vague tips and best practices, we figured we'd give you an example case:

Samantha works for an app that collects, aggregates, and distributes the news. She and her team are plotting out new features, and want to prioritize based on potential user needs. She's hoping to conduct a study that gives her a broad, accurate picture of how people, across demographics and regions, stay up-to-date with current events. But she can't travel across the country and trail her participants until they click on a headline. She decides to conduct a diary study, to better understand the ways her product might provide more value, and fit more easily into their day.



Step 1

Prep and refine

There's a lot to consider when you're pulling the "hows" of your study together. Here's "a bit" of that "a lot":

Define your research questions so they work well within a diary structure.

Define your study's structure so it takes advantage of the "in-the-moment" capacity diaries offer.

If Samantha asks participants to tell her "how they usually stay informed," but doesn't have them log their responses until the end of the week, she'll probably get similar insights to what she could gather in a series of recurring interviews. But say she has them log, or answer a few quick questions, everytime they "read, listen to or otherwise stay knowledgeable of the world around them,"—she'll probably get a bit closer to understanding their frustrations and motivations.

This immediacy is key to unveiling what's new, interesting, and nuanced about an action. Oftentimes, facets of experiences feel major in the moment but are forgotten upon reflection.

As you write a research question or hypothesis, decide on a corresponding trigger or prime—that is, a sentence that lets a participant know when to capture or document. The specificity needs to be carefully crafted so that it's informative without leading. You want folks to know when it's time to shine, but also to be comfortable taking some liberties (e.g., what do people even CONSIDER "knowledge gleaming" moments?). That's when you learn the most.

Set start and end dates that'll get you the insights you need, before your participants lose interest.

Even your most engaged participants will get sick of logging six months in. Ask yourself: "How long do I really need to run this study to get findings that would be valuable?" And also: "How much data will I really have the time to tag, and sort, and dig through?"

And then skeptically ask yourself, "*Really?*" a few more times—because it's easy to get insight-greedy. It's also easy to bow out early. If Samantha wants to really know how people engage with the news over time, one logged day, when something big and

Choose a tool that makes sense for your goals, budget, and timeline.

Now comes the critical moment where you have to make a choice: How do I get thoughts and feelings from my participant's brain into my pretty research folder?

A few options:

- **You can go truly vintage.** Send your participants a dairy. Have them write in it. Get them to send it back. This has some charm in theory, but it's likely a pain in practice. You'll get all your results in at the same time, making it hard to sort and prioritize as you go. You have to read potentially awful handwriting. You'll have to manually import your data. You have to wait for the mail to come. If your instructions are unclear, your participants may misinterpret them—and you can end up with entire books of data that's complete unuseable. We'd avoid it unless you have a very small budget, and a very long timeline.
- **You can DIY it—using a method of communication your audience is already familiar with.** Have participants log over email, WhatsApp, SMS, Facebook, etc. Depending on the platform you choose, and the digital tools at your disposal, you might be able to collect multimedia entries, or automatically send reminders. This also offers you some level of search capacity, but exporting and sorting data will still be a bit of a pain. In the end, this approach will leave you jumping through quite a few hoops. You're going to have to deal with some very unstructured data. And you might have participants that are skeptical of the credibility of a study conducted over social.
- Still, if you have a very limited budget to work with, this might be your best option. Here's a walkthrough on how you can build your own digital diary study.
- **You can use a tool made specifically for research.** These aren't free, but they offer feature sets that make running a successful diary study a lot easier, and generally, more effective. A smart diary study tool will allow participants to log multimedia entries. It'll work well on mobile. It'll send your recruits reminders, and help you recruit participants that are app-savvy. One of the biggest advantages with choosing a research tool specifically is the capacity to deal with all your qualitative data in a way that makes sense. Look for a tool that allows for easy sorting, tagging, and exporting.

Full disclosure...we just so happen to have built a platform that does all of those things. If you're interested, we offer a free version you can play around with.
Give it a try.

Whatever tool you choose, think about how you can make things easier for your participants. An app or medium that is natural for your target demographic will yield more frequent, higher-quality results. Be considerate to the fact that your study is going to interrupt the natural flow of your participants' days. It might be easier to click "record" in a user-friendly app than pull out a physical journal and jot down a thought.

Be strict in how you recruit.

Aim for fewer, but better, participants. Consider the conclusions you want to make, and then be honest about the sample needed. National? Broken up by region? Cut by persona or segment?

Whatever your needs are, focus on capturing a few very solid recruits from each bucket who, together, weave a complete picture. Ask smart screener questions. Offer a fair reward. And cut any participants who seem unengaged. Remember, depending on the length of fieldwork, you'll be capturing a truckload of data with even a few engaged recruits.

Pick out your props or stimuli.

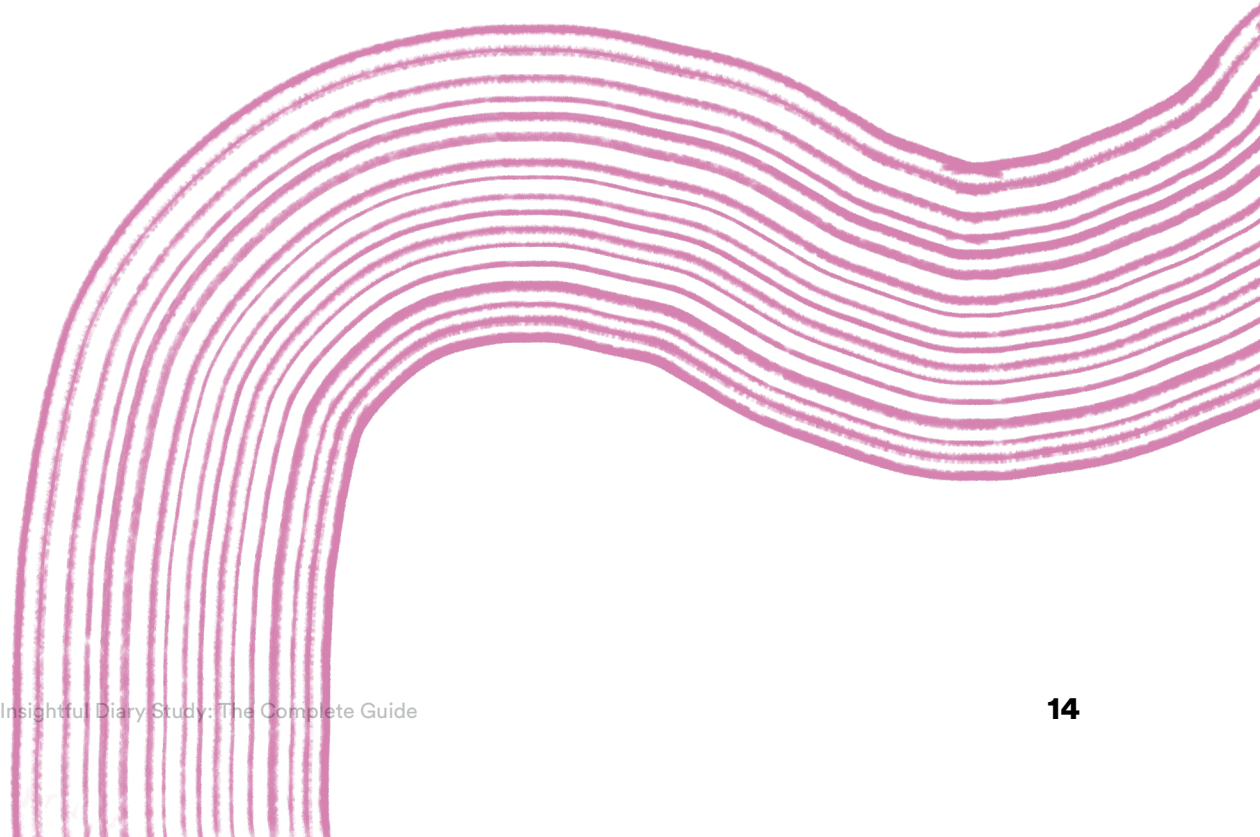
Are you physically sending an item, product, or prototype for your users to interact with? Great. Get that in the mail, and prepare some explicit instructions. Also note that props can be mental. For example, to get to the bottom of our "on-demand" commercial culture, the dscout team asked participants to "imagine they had a magic button" they could press every time they needed something.

Decide how your participants are logging.

There are a few different techniques here you can guide your participants toward.

We'll go over them quickly.

- **Interval-contingent protocol.** You pick regular, predetermined intervals for participants to report. For example, they can make a note every 3 hours throughout their workday. This is most useful if the behavior you're trying to observe isn't situation dependent, if you're not sure when the situation you're hoping to observe will occur, when you want a more general picture of someone's day-to-day life, or when you're worried about having an adequate event frequency.
- **Event-contingent protocol or in-situ logging.** When a specific event occurs, your participant logs. For example, when they get distracted, enter a meeting, or receive a new notification, they answer a set question you've defined, or make a quick note.
- **Signal-contingent protocol.** Some sort of set alert or alarm tells participants when to complete an entry. This gives you a lot of adaptability in your study design, but requires a smart tool and attentive participants with flexible schedules.



Step 1.5

If you're “DIY-ing” your study, ready your participants

Important disclaimer: If you're using a set research tool like dscout to run a diary study, you can go ahead and skip this step. Your participants should be familiar with the platform, and will likely have experience logging and recording for longitudinal studies. You won't need to actively recruit, prep, set expectations, or hand hold—and incentives will likely be processed through the app. Give this section a skim, or headstraight to [Step 2](#).

Once you've recruited the best possible people, you'll need to equip them to do the best possible job.

A few tactics that can help:

1. Schedule an onboarding call to set expectations.

Diary studies are unique. For participants, they take some adjusting to. If you're soliciting and screening your own recruits, a quick onboarding call to go over the process is essential. Make sure you explain....

- the difference in effort required for completing many small tasks, or switching between tasks, versus completing one large task (e.g., a long survey).
- how to use whichever tool they'll be working with to log entries. It might be useful to screen-share and walk them through the process, if they're not already familiar with how things work.
- how they'll know when it's the right time to log an entry, and whether or not they'll be reminded to do so.
- what sort of entries you'll be expecting (photo? video? audio? written?) — and what a helpful entry looks like.
- how they can reach you, and when they can expect to hear from you. It's also a good idea to confirm that the contact information you have for your participants is the best way to get ahold of them.

2. Create a cheat sheet.

Maybe you'll get lucky. Maybe your participants will all be super-attentive note-takers with incredible memories and technological literacy.

More likely, your participants will be human. They'll forget who to contact, when to log, or how a piece of tech works.

Make them a quick, downloadable cheat sheet with all the "Tell me again...?"s and FAQs. It'll save you both a lot of time.

3. Share your rewards structure.

Diary studies are a lot of work.

You should probably pay folks for putting the hours in. And you should probably do it in a way that encourages engagement.

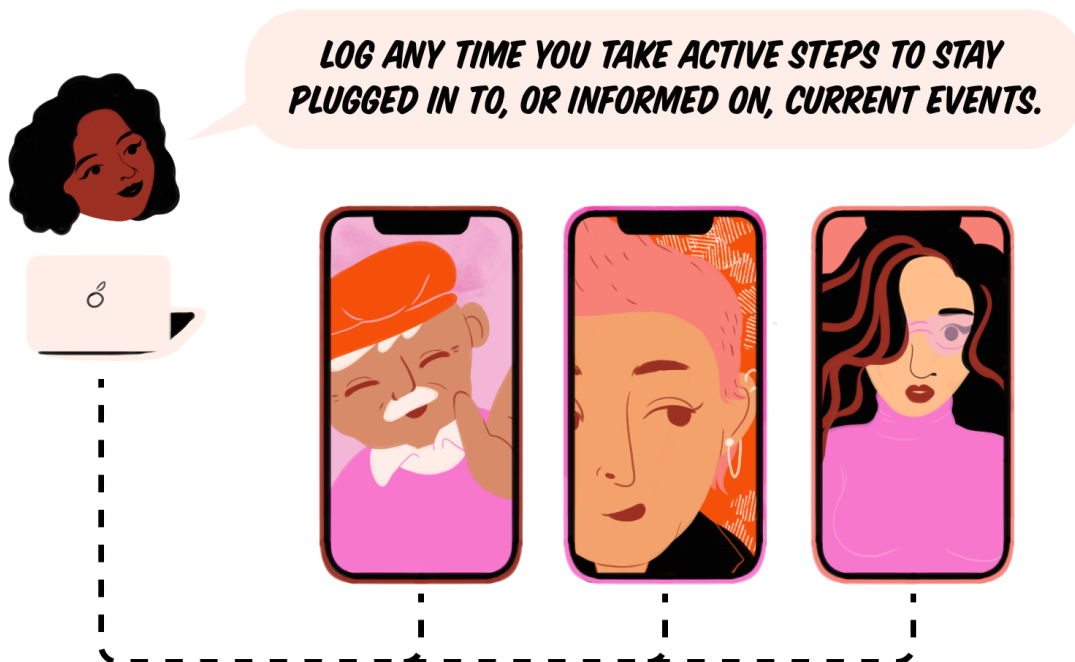
Be upfront with your participants on how (and when) they'll be compensated for their time. For a longer study, you might want to space out your payments, rewarding participants as they complete different phases. Sometimes it can be to your advantage to offer a "bonus" payment at a study's close for "high-quality responses." Ideally, you'll use this as a "carrot," and it'll be granted to all participants. Less ideally, you can withhold it from the slackers—or motivate your less-detailed participants with a reminder that their "high-quality" bonus is in jeopardy.

Samatha thinks about how long a person would reasonably try her news app before letting it fall out of habit. She looks prior research on her target market's use patterns, schedule, and day-to-day variance. She wants to have enough time to see how participants interact with the news on a workday, in contrast to their days off. And she doesn't want her results to be clouded by a single high-interest news day or event.

In the end, she decides on a single workweek timeline for logging. Internally, she sets aside days for a potential post-study reflection session.

Samantha wants to be able to show her stakeholders photos, videos, and screen shares from her participants. She has limited bandwidth to spend digging through texts or emails, so she decides to use a set diary study tool.

She decides on a simple trigger: "Log any time you take active steps to stay plugged in to, or informed on current events." Using her diary study tool, she sets reminders to reach out to participants throughout the day so they keep her prompt top-of-mind. At 6 p.m., she also prompts participants to reflect on how informed they feel, and how many times they took steps to stay tuned in.



Step 2

Log and process

Oh hey! You made it! The prep work is done, and you're finally ready to press "go."

Here are some questions you might have once your study is off the ground:

How should I communicate with my participants?

In a word: frequently.

We don't have anything novel to say here—the best practices are about what you would expect. Giving your participants frequent feedback encourages better responses. Send reminders, provide guidance for tasks that might not be as intuitive, acknowledge entries as they come in, and be as flexible and as understanding as possible.

The key here is to acknowledge their feedback as a human first, and a researcher second.

Did they have a rough day at work, and communicate honestly with you about that? You owe them more than an automated "Thank you for your response." A quick "I'm sorry to hear that, and I really appreciate you sharing" can go a long way.

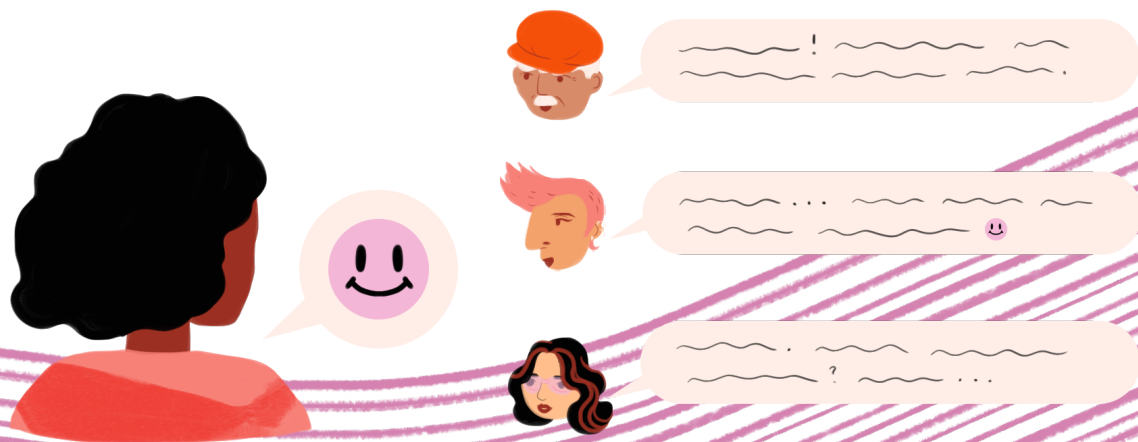
Oh god, there's a lot of data coming in. What do I do with this?

Take notes as you go. If your diary study tool doesn't auto-transcribe it already, send video or audio entries for transcription ASAP. If you procrastinate now, you'll drown in data later.

Diving into responses as they come in may help you better shape follow-up questions for participants. It'll help you decide which participants may need an extra push to respond fully. And it'll allow you to share critical details with other researchers or stakeholders, enabling them to invest more in the project.

Samantha takes a few minutes at the end of her day to respond to each participant entry, and to remind participants again if an entry is missing. She reads or watches responses quickly, and bookmarks particularly insightful answers for synthesis.

She also starts to notice that some of her participants are giving particularly engaged responses, and flags them as a focus point for later analysis. She sends encouraging messages or gives further instructions to participants who give less in-depth responses. She noticed a few participants mentioned they were upset by a news story, or frustrated by a web experience—and she made sure to respond empathetically in her replies to them.



Step 3

Follow up and learn more

The sayings are true: the more you know, the more you'll want to know.

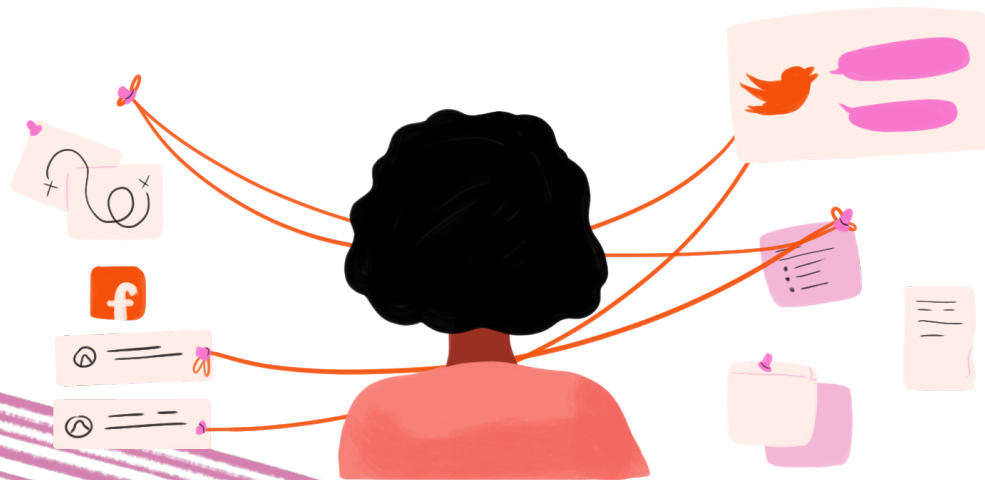
If you've done things right so far, you'll have developed a solid relationship with your participants. You'll have a general sense of what they've submitted. And you'll have about 110 new things you'll want to dive deeper on.

A few ideas:

- **Schedule follow-up interviews with your most engaged participants.** Or, the participants who offered unique insights you'd like to know more about. Even a 30-minute debrief session after a diary study's close can go a long way toward confirming a hunch, closing a gap, or providing much-needed context.
- **Ask for participant feedback.** What about the study went well? What could've gone more smoothly? What did they learn from monitoring their habits, or logging the details of their day-to-day? This can go a long way toward exposing biases and improving future studies.
- **Enrich your qualitative data with quantitative statistics.** Notice a trend you'd like to explore further? Worried about a less-than-representative sample size? Take what you've learned, and write a survey. Run an A/B test. See what you can learn from analytics. Expand your audience, and confirm your new hypotheses.

As Samantha sorted through the data, a few threads started to come together. She realized that for many users, their engagement with the news was passive. They were sent an interesting article from a coworker or they clicked on headline that came up on their Twitter feed. Far fewer checked a designated app, newsletter, or website. Most were not loyal to any particular news source.

She also realized that 12 of her participants gave consistently insightful responses. So she picked 3 of them—in different regions, of different generations, and with different political leanings—to ask a few follow-up questions.



Step 4

Analyze and share

So you did it. Now what?

When you're running any sort of qual study, you need to set aside some "immersion time"—where you sit with the data, track patterns, and start to synthesize. If you're working in the field, your immersion time takes place in the field. If you're doing a diary study, it takes place in the analysis stage—as you start to sift through and engage with all your data.

A few tips and tactics for analyzing effectively:

Identify “star” participants.

If you come across participants that offer particular insight, or succinctly represent a larger pattern, make them the stars of the show. Use them to lead your synthesis and provide framing for your presentations. Bring in quotes or videos from other users as supporting cast.

Tag, crosstag, search.

There are various methods and best practices for tagging qual data. It's a big commitment, and not *always* necessary, but can unearth some interesting patterns. One basic tactic:

- Go through your responses and first assign descriptive tags. Things that are obvious and observable. For example, Samantha could sort her data by media type, tagging: “podcast,” “app,” “social media,” “radio,” “newsletter,” “magazine,” “YouTube,” etc.
- Then start assigning tags to themes or intangibles. These are subjective, and you might want to assign them collaboratively with teammates. For example, Samantha could tag “useful,” or, “interesting,” or “frustrating” or “distracting.”
- Then you might unearth some patterns as you look at cross tags. For example, “app” and “distracting” may frequently overlap. Or “interesting” and “YouTube.”

Share insights with stakeholders.

You're probably walking away here with more pithy quotes than flashy statistics. If your research goals and study design were on target, your results should have real ramifications for your company.

Make sure to schedule some time to discuss or present your findings to anyone who might benefit from a bit of in-depth user insight. That means going beyond just the design or product team.

If you have photos or videos, push those to the top of your “to share” list. And if you have “next steps,” be confident in them. There's a recurring resistance to offering opinions in an “unbiased” space like UXR. But using the data to inform decisions is a great way to be an advocate for your users.

Build, or add to, a research repository.

Where does your research live? Is it accessible if teams want to refer back to it? Can it be shared easily with new employees? Make sure you have a dedicated, easy-to-find space where people in your company can circulate and reference your work.

Samantha blocks off a few calendar days to make sense of what she’s gathered. She shares the raw data with her team, and invites them to a brief synthesis session to consider possible conclusions.

In the end they decide on a few important ways the data can be used. In the short-term, she recommends new integrations—to ensure her app works seamlessly with the discovery mechanisms her audience already uses. In the long-term, she makes some updates to her company’s existing “jobs to be done” framework to account for motivations and pain points that emerged from her study.



Summing it up: diary studies are a lot

They're a lot of time, and a lot of energy, and a lot of data, and a lot of resources. But they're also: a lot of findings, and a lot of access, and a lot of intimate knowledge about someone's day-to-day life.

And in the end, they're far more than a “poor man's field studies.” They're a source of truly rich insight—that can change the way you think about problems, products, and the people who will someday use them.





As People Nerds, we dissect *how* to answer the big *whys*

Read our interviews with top UXR practitioners and pick up a few pieces of novel advice for every stage of your research project cycle.

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