User Research Plan

Taxi Licensing Alpha

Created by: Bradley Reeder , Ash Middleton , Verity Nelson , informed by previous [user research workshop](#) held with stakeholders 17th-19th July
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Project Background

In order to become a taxi driver, operator or proprietor (vehicle owner) of taxi vehicles, you must apply for a licence with your local council and become a licence holder. These licences are then managed, renewed and kept up to date by licensing teams within local councils. There is no joined up service for this across councils and the process creates administrative burdens and inefficiencies.

A previous discovery and alpha project has been conducted by the Rushmoor borough council to explore this problem space. This previous work focused on understanding the user needs of licence holders and licensing teams and prototyping a digital service for taxi licence holders to manage their licences online.

There is interest among other local councils in finding a digital solution for managing taxi licences that is scalable, cost effective and can be consistently applied across councils. A further alpha project is hence required to explore local variations in ways of working and user needs across a working group of local councils. This will be with the goal of identifying a scalable digital solution that will improve the experience of licence holders and licensing teams across councils.

User Research Objectives

Overall the user research in this alpha project will focus on licence holders and licensing teams to explore and understand their user needs and local ways of working with a view to identifying and testing a scalable digital solution.

Specifically we will investigate with **licensing teams**:
- Pain-points and inefficiencies throughout the current 'manage your licence' journey
- Most common complaints, issues and queries from licence holders
- Role in the manage your licence and licence renewal process
- Attitudes towards a scalable 'manage your licence' digital solution

We will investigate with **licence holders**:
- Pain-points and inefficiencies throughout the current 'manage your licence' journey
- Motivations for what licensing teams identify as "non-proactive" behaviour when updating and renewing licencing artefacts
- Needs around accessing the service and receiving non-digital support
- Needs around communication with licensing teams and their attitudes towards them and enforcement
- Needs and expectations around how payments for the service should work
- Needs and expectations around receiving updates and reminders when licensing artefacts are due for update or renewal
- Key benefits and improvements to the 'manage your licence' service

We will investigate through **prototype testing** of digital solutions:
- Key improvements to how user's needs can be met in a scalable way
- Usability issues and pain-points to make the solution simple and accessible to use

Research Methodology

The approach we're taking to generate insights about the user groups in this project is through a combination of user interviews and usability testing that we will complete over 3 phases.

User interviews is a qualitative research technique that involves conducting intensive individual interviews with a small number of respondents to explore their perspectives on a particular topic. Usability testing is a qualitative research technique that involves giving users tasks to complete using a digital prototype and evaluating how simple it is for them to complete the task.

Phase 1 - Stakeholder interviews

In this initial phase, we will speak to the licensing teams in each of the councils over Microsoft Teams to discover their current experience of managing licences.

Duration: 1 hour
Location: All remote via MS Teams on a Laptop/Computer
Roles in the stakeholder interview:

- Research participant x1
- Moderator (researcher) x1
- Note taker x1
- Observers x2 maximum

Phase 2 - User interviews and concept testing

We will go and meet licence holders across the different councils in-person for interviews, to understand their needs and initial thoughts on the existing prototype developed during the Rushmoor Alpha.

Duration: 30-60 minutes

Incentive: We will try to recruit without incentive and offer a gift voucher only if needed

Location: All in-person via pop-up research or arranged in-person visits. Some sessions may be run remotely over phone call or remote via Google Hangouts on a Laptop/Computer to ensure we reach a representative sample of users.

Roles in the field research:

- Research participant x1
- Moderator (researcher) x1
- Note taker x1
- Observers x1 maximum

Phase 3 - Usability testing

We will conduct 1-2-1 research sessions with licence holders across all councils over Microsoft Teams, testing the usability of a prototype that will be iterated and improved from the previous phase of research.

Duration: 60 minutes

Incentive: We will try to recruit without incentive and offer a gift voucher only if needed

Location: All remote via Google Hangouts on a Laptop/Computer, for those who can, otherwise MS Teams.

Roles in the usability testing session:

- Research participant x1
- Moderator (researcher) x1
- Note taker x1
- Observers x2 maximum

User Groups and User Research Participants

User Groups

By user group we mean, a set of people who have similar experiences, goals, motivations or roles. For this project we have identified 2 main user groups.

Group 1: Licensing teams

Includes Licensing team managers, Licensing senior officers, Licensing officers and Licensing support officers. They are civil servants hired by the local council to manage taxi licences. The majority of administrative work related to managing taxi licences is carried out manually by licensing support officers and licence officers so they will be a higher focus.

- High focus (70% of users we will engage) - Licensing support officers, Licence officers
- Lesser focus (30% of users we will engage) - Senior Licensing officers, Licensing team manager

Group 2: Licence holders

Includes licence holders of a taxi driver's licence, vehicle owner (proprietor) licence or an operator licence. Most commonly these are taxi drivers (private hire or hackney carriage) who must apply for, renew and manage a taxi driver's licence as a requirement for their trade. However, licence holders can hold multiple licences and also be an operator or vehicle owner. Taxi drivers who own their own vehicle are referred to as "owner drivers" and have a taxi driver and vehicle owner licence. Taxi drivers who own their own vehicle and are self-employed as their own operator are referred to as "one man bands" and have a taxi driver, vehicle owner and operator licence.

- High focus (70% of users we will engage) - Hackney carriage drivers, Private hire drivers, "One man bands", "Owner drivers"
- Lesser focus (30% of users we will engage) - Hackney carriage vehicle owner, Private hire vehicle owner, Operators

Research Participants

By research participants we mean, the people we will recruit to take part in our research so that we have a representative sample of the user groups mentioned above.

To ensure suitability for this research and a representative sample, we have agreed on the participant criteria for each user group as shown in the table below.

To ensure a variety of perspectives and minimise biases due to associations and connections with the local councils, we will be sourcing participants using a mixed channel approach where possible.

	Target sample	Recruitment channel	Must have criteria	Nice to have criteria
Group 1: Licensing teams	8	Points of contact from local councils	● Mix of Licensing team roles in order of weighting: 　○ Licence support officers 　○ Licence officers 　○ Senior Licence officers 　○ Licence team managers	● Include IT Uniform Support roles
Group 2:	12 -	Pop-up	● Mix of different types of licence holders	● A mix of views on local councils from

| Licence holders | Phase 2 8 – Phase 3 | research at events or locations

Sessions scheduled via screener distributed by local councils

Users with accessibility and low digital needs to be reached directly through points of contact at local councils | ● Mix of how long they've had licences
  ○ Including users who have gone through the manage your licence process previously
● Mix of age groups
● Mix of genders
● Mix of levels of digital confidence
● Mix of proficiencies in English and literacy levels
● Inclusive of accessibility needs, e.g. neurodiversity (dyslexia)

Operators only:
● Mix of operator firm sizes
● Inclusive of driver operators

Vehicle owners only:
● Vehicle owners who would have to manage multiple or a lot of licences
● Vehicle owners who own 1 vehicle
● Inclusive of owner drivers | favourable to unfavourable
● Licence holders with medical conditions that are monitored by the licensing team, e.g. diabetes
● Taxi firms who will have lots of taxis in their name, who all are named on the licence |

Expected Deliverables

The optimal output would be to deliver qualitative research insights to inform the development of a scalable digital solution that meets the user needs of licensing teams and licence holders. This will take the form of:

- A summary of insights and recommendations report
- A final show and tell presentation of the research insights and recommendations

Please note, no written transcripts from user research sessions will be delivered within the current scope of work since the auto generated transcripts on Google Hangouts and MS Teams will need to be manually reviewed to remove personally identifiable information and correct any inaccuracies in transcript so that insights are not misrepresented.

Research Activities and Timings

Here are the high level activities that need to be done to complete the research for this project, with their respective timeframes or deadlines so that this work is deliverable according to the agreement in the SOW.

Research Activity	Time frame or Deadline
Create & Agree on User Research plan	August 1st
Conduct phase 1 stakeholder interviews	August 9th
Recruit Research Participants for Phase 2	August 9th
Conduct phase 2 research sessions	August 22nd

Analysis of phase 2 research sessions	August 29th
Recruit research participants for phase 3	September 5th
Conduct phase 3 Research sessions	September 19th
Analysis of phase 3 research sessions	September 25th
Write summary report	October 3rd
Present insights and recommendations	October 3rd

Participants Confidentiality and Research Ethics

Research Participants will be required to complete and return a consent form ahead of their session and this will give them the free will to opt in or out of:

- Note taking for analysis purposes
- Observers from Zaizi
- Observers from local councils
- Video and audio recording
- To be contacted again after their session

Where consent is given for video and audio recording, these will be retained in Zaizi's servers for up to 3 months after the project, and access given to the local councils, after which they will be deleted.

Any personally identifiable information about participants will be kept confidential and only accessible on a need to know basis, by the Zaizi and local council team members to schedule the sessions, and includes participants last name and contact details.