

Thunderbird & Evolution

User research findings

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The test

Participants

Thirty participants were recruited, with two dropping out last minute and not being replaced.

The users represented a mix of gender and age and there was an even split between Windows and Mac users, with several participants being users of both operating systems; two participants also reported actively using Linux.

Four participants had Thunderbird experience. All users rated high to heavy in terms of email use.

Methodology

One email account was set up in preparation for the sessions; all users were asked to use this account's details to set up the email package. Days prior to the testing, messages were sent to this account and it was also subscribed to a mailing list, in order to ensure a realistic influx of emails to this Inbox.

Half of the participants interacted with Thunderbird and the other half with Evolution; Thunderbird 5.0 build 1 and Evolution 3.1.2 were used on a desktop machine using Ubuntu 11.10.

Between sessions, the set up was cleared to ensure that the next participant started from scratch. For Evolution, this was achieved by removing the account details and for Thunderbird, all hidden files were deleted.

Account changes performed by the user were reset between sessions (e.g.: new folders, preferences and email flags.)

During each 60 minute session, participants were asked to:

- set up the relevant email package for an existing account;
- create a signature;
- compose an email and change font colour;
- manage emails in folders;
- locate a specific email containing an attachment (sent prior to the session);
- respond to an email containing an attachment and send the latter back to the sender;
- create a contact list and send a message using contacts.

Email

Email use trends

The majority of participants reported owning more than one email account and by multiple providers; only a couple of participants had one personal account and one at work.

As a result of multiple account ownership, participants were used to trialling new email interfaces; however, this also meant that the majority of them knew exactly what their requirements for an email package were and were very strict on new package incentives (see section below.)

Participants also reported using only very basic features of email packages (e.g.: email management, folder creation, text editing and attachment sharing); a small number of users reported creating and actively using a contacts list and only a few had experience setting up and using complex features such as signature and filters.

Majority of participants use mobile devices to keep on top of email received but only use these devices to read, delete, compose quick replies to messages or send photo attachments. Users generally utilise laptops or desktop computers to carry out more intensive email management and deal with more involved message creation.

Attitudes towards email

Users reported email as being a core part of their lives and, therefore, relying on their email package to be efficient, intuitive and trustworthy; they require access to email and its features to be facilitated effortlessly and reliably.

As a result, users are very careful about the email systems they choose to use and require a huge amount of incentivising to change to a new system if they are not actively seeking one.

Therefore, first impressions are extremely important and email packages need to make sure that they project a positive image during those first interactions: setting up and basic email managing. Users seem to be more forgiving about features less important to them, but first impressions are key.

Detailed findings

What users liked

There were aspects of both Thunderbird and Evolution that participants enjoyed and found easy and intuitive to interact with.

Thunderbird	Evolution
<ul style="list-style-type: none">✓ Straightforward and familiar set-up	<ul style="list-style-type: none">✓ Useful guiding steps in mail configuration assistant
<ul style="list-style-type: none">✓ One-click <i>Add to Address Book</i> feature in email preview and window	<ul style="list-style-type: none">✓ Intuitive contextual menu option to <i>Add Contact</i> in email preview and window
<ul style="list-style-type: none">✓ Window/message tabbing system	<ul style="list-style-type: none">✓ Menu items easily accessed as alternative to button shortcuts
<ul style="list-style-type: none">✓ Familiar, intuitive language	
<ul style="list-style-type: none">✓ Quick search that meets expectations	
<ul style="list-style-type: none">✓ Both were seen as having a familiar layout	
<ul style="list-style-type: none">✓ Both met expectations in terms of generally intuitive access to contextual menus	
<ul style="list-style-type: none">✓ Both provided intuitive access to search facility	

Thunderbird

Users found this product familiar to set up and use, liking the easy-to-understand language used, one-click *Add to Address Book* feature and tabbing system.

Evolution

Users commented on the helpfulness of the guiding steps during set-up, liking the intuitive contextual menu option to *Add Contact*. Participants naturally leaned on toolbar buttons to facilitate interaction, but Evolution menu items were seen as an easy alternative to accessing functions they could not find in the toolbars.

Despite both products being described as having an 'older look', users liked the 'clean and uncluttered' design in both, particularly in Thunderbird.

What users struggled with

Both Thunderbird and Evolution presented users with interaction issues ranging from those with severe impact (i.e.: leading to inability to complete task) to mildly impacting but building frustration with the system. The table below lists a summary of the issues users faced, their severity; it is then followed by a detailed description of these issues.

Thunderbird	Evolution
<ul style="list-style-type: none">✗ Confusion over search use (<i>severe</i>)	<ul style="list-style-type: none">✗ Set-up perceived as longwinded and not as expected (<i>severe</i>)
<ul style="list-style-type: none">✗ Difficult folder location and management (<i>severe</i>)	<ul style="list-style-type: none">✗ Difficulty locating account email (<i>severe</i>)
<ul style="list-style-type: none">✗ Unclear server options (<i>mild</i>)	<ul style="list-style-type: none">✗ Unintuitive message search (<i>severe</i>)
<ul style="list-style-type: none">✗ Difficulty personalising email text (<i>mild</i>)	<ul style="list-style-type: none">✗ Inability to personalise email text (<i>severe</i>)✗ Once email opened, difficulty getting back to Inbox (<i>severe</i>)✗ Inefficient folder creation (<i>mild</i>)✗ Despite long set-up, confusion over lack of password request (<i>mild</i>)
<ul style="list-style-type: none">✗ In both, users had difficulty finding and personalising signatures (<i>mild</i>)	

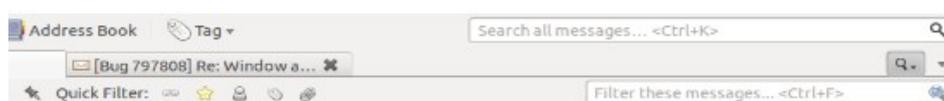
Thunderbird

In Thunderbird, users mainly struggled with locating folders and personalising text. As with Evolution, participants found it difficult to locate and manage folders and personalise email text.

Less severe experiences in Thunderbird were around making a confident server selection in set-up and finding and personalising signatures.

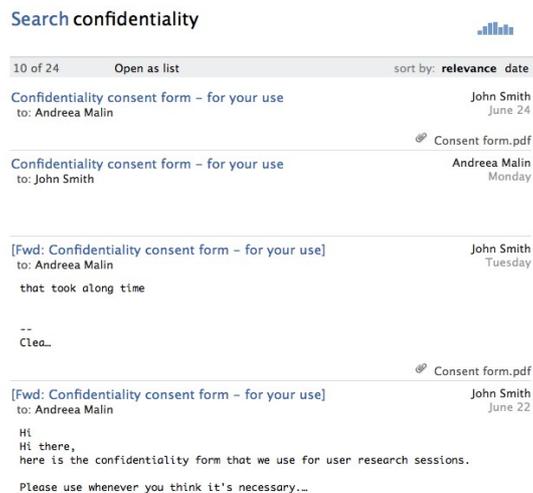
Confusion over search use (severe)

Search was intuitively used by participants to quickly find a required message in a large Inbox; users were confused by the existence of two search fields, often opting for the *All messages* search box as they intuitively saw this as highest in the hierarchy.



This choice often resulted in disappointment when users did not expect to be taken away from the folder they were searching in; in addition, they found the

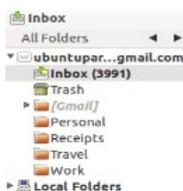
search results confusing and inefficient, reporting that they expected the item they were searching for to be more easily visible.



Participants were further frustrated by the fact that if they had misspelled an entry or their search returned no results, they would not be aware of this until taken to the search results tab, which they saw as a frustrating waste.

Difficulty locating and managing folders (severe)

The majority of participants successfully created folders, either by right-clicking in the folder area or using the *New* functionality in the top menu. However, most of these users were unable to easily locate the folder created or move once they had located it.



This was due to them not realising they were creating subfolders; once subfolders had been created, unless that folder already had folders within it and it was expanded, users did not notice the expand icon next to the folder and bypassed it.

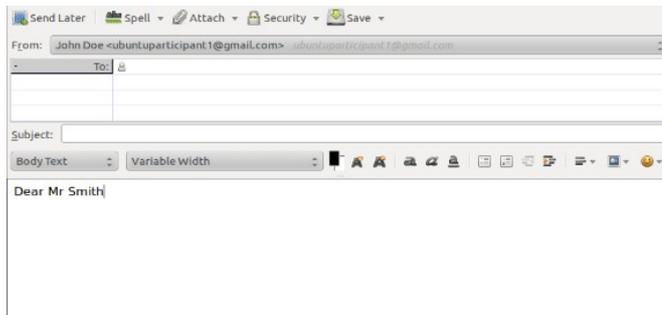
Some users saw this as an error in creating the folder and created one or more additional ones; eventually, they noticed that the location options included folders they thought they had not created and sought out all folders until eventually finding the required folder.

Finally, once they found the created folder, users attempted to relocate them to the desired place; majority of users failed in doing this successfully.

Difficulty personalising message text (mild)

More than half of users struggled finding the function to change font colour; the majority looked for this in the message text toolbar, bypassing the colour functionality because they expected the icon to look differently.

Users eventually found this with the use of tooltips, but not after looking through all toolbar and top menu options first.



Participants voiced the issue for this to be the icon being in black and therefore too subtle; they mentioned preferring a more colourful icon or one resembling a palette.

Unclear server options (mild)

Participants reported liking the apparent ease of setting up but most were confused by the server options provided in the second, and final, step.

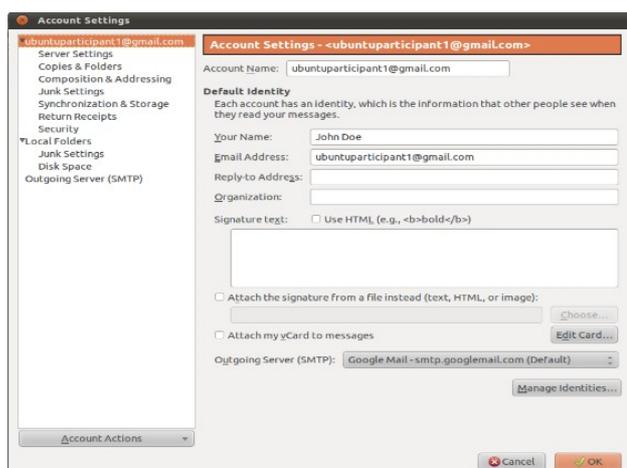
About half reported that they would navigate away from the window and research more into their options, with the rest either ignoring this message and go with the *IMAP* option already selected or choosing the *POP* option which caused them some issues finding emails later on.

The majority of users reported preferring helpful information and guidance on the options provided in the set-up screen, in order to avoid navigating away or uncertainty.

Difficulty finding and personalising signature (mild)

The majority of participants were unsure where to find the signature functionality, with the majority expecting it to be either in the main toolbar, message toolbar or *Message* menu section.

Most participants were unable to find this feature on their own without looking up help or reporting that they would ask a friend for help.



Once users were shown this feature, all but one were unable to personalise the font in the signature, selecting HTML but being unable to include HTML tags.

Evolution

In Evolution, users struggled with the unexpected set-up length and had great difficulty locating the account Inbox. In addition, users preferred searching long email lists but mostly found Evolution's email search unintuitive and locating folders and personalising text difficult.

As with Thunderbird, participants found it difficult to locate and manage folders and personalise email text.

Participants had less severely impacting issues in Evolution as well; these included difficulty getting back to the Inbox once in an opened email, issues with finding and personalising signatures and confusion over lack of password request in set-up.

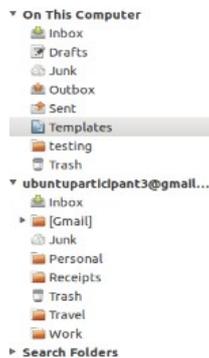
Longwinded, unexpected set-up (severe)

Despite appreciating the guiding steps outlined in the mail configuration assistant, the majority of participants reported feeling that this process was unexpectedly too long and found the options provided very technical and confusing.

For the majority of users, this culminated just at the second step, where they thought they were being asked to retrieve backed-up files, rather than being offered option to set up this feature. Some users failed at this point, reporting that they were confused by this and would revert to using the current email set-up they had.

Locating account email (severe)

The majority of participants had difficulty initially locating account email due to the email folders displaying an Inbox and an account-specific email section. Most participants did not notice that the account email area was collapsed and were confused about the 'Inbox' shown at the top of the folder list not showing any messages.

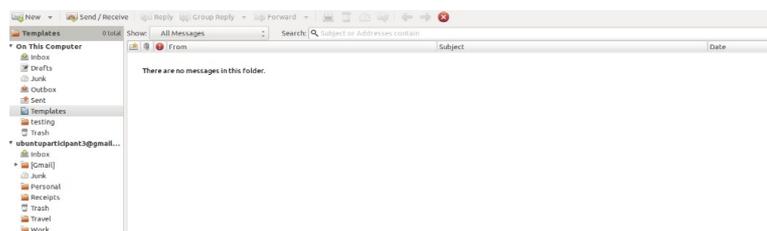


Users attempted to view the account Inbox by selecting *Send/Receive* and then clicking through all folders available. Eventually users noticed the email account folder with the *expand* icon next to it and accessed the account folders that way.

This experience caused great alarm in these users, particularly as it was at the beginning of interaction with the system; as a result, many reported loss of trust in the package and considering ending its use.

Unintuitive message search (severe)

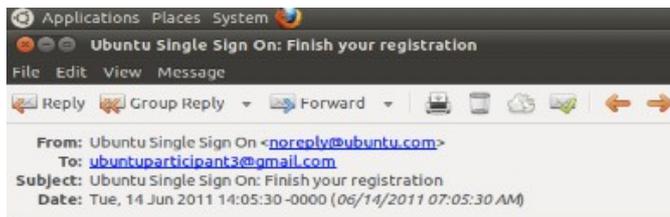
As discussed, search was intuitively used by participants to quickly find a required message in a large Inbox. Many users failed finding the required search results because they carried out a search unaware that they had selected an irrelevant folder.



This resulted in *no results* being returned and users being confused because they had expected to be able to search all folders.

Once email opened, difficulty getting back to Inbox (severe)

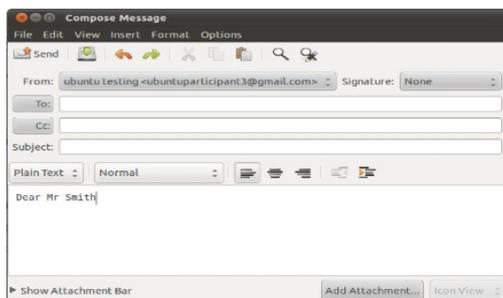
Half of participants naturally double-clicked to read email in more detail; however, in Evolution, this resulted in email opening up over the main Inbox window, hiding the email list.



Users were confused about this and struggled to get back to the message list; majority reported looking for a button or link to *Inbox* and were extremely weary of closing the window down (either via the buttons or menu items) because they were nervous about potentially closing down the entire email application.

Inability to personalise email text (severe)

Almost all participants were unable to personalise message text in Evolution; they expected access to font colour to be available along with the other font toolbar options and entirely bypassed the HTML option. One participant selected HTML and still missed the font colour option.



Users were very disappointed by the lack of this feature and looked at all toolbar and top menu options for access to this.

Despite long set-up, confusion over lack of password request (mild)

In addition to finding the Evolution email set-up longwinded, participants were confused why this had not asked them for account password details. The majority saw this as a frustrating time waster, particularly as they were asked for this separately, once their email had been set up.

Difficulty locating and managing folders (mild)

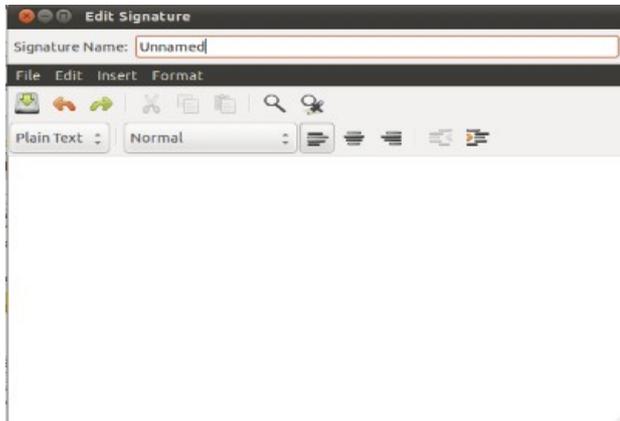
As with Thunderbird, the majority of participants successfully created folders, but here mainly by using the *Folder* functionality in the top menu. All participants expected to be able to create a folder by right-clicking in the folder area and only a few right-clicked on a folder to look for this functionality.

Despite being able to create the folders using the top menu, users were disappointed with the lack of quicker access to this feature in the folder area (either by right-clicking or with the use of a button) or a button in one of the top toolbars.

Difficulty finding and personalising signature (mild)

As with Thunderbird, the majority of participants were unsure where to find the signature functionality, with the majority expecting it to be either in the main toolbar, message toolbar or *Message* menu section.

When users found the *Signature* option in the message toolbar, they were very frustrated that this did not provide a shortcut to signature creation.



Most participants were unable to find this feature on their own without looking up help or reporting that they would ask a friend for help.

When they were taken to the signature feature, users were again frustrated at the fact they could not find a font editing facility, despite the interface looking like it should allow for this.

Conclusion

As discussed, users gave both positive and negative feedback on their interactions with Thunderbird and Evolution, with Thunderbird consistently being perceived by users as easier to use and fit for purpose than Evolution.

Thunderbird was widely liked for the perceived straightforward set-up and facilitated access to contact save, search and open windows features. In addition, users commented on the familiar language used in the application.

However, participants encountered a few severe issues which tarred their image of the system. These consisted of extreme, at time show stopping, difficulty with:

- successfully understanding and choosing the relevant search field to use;
- locating and managing the preferred location of folders.

Finally, these users encountered some lack of clarity over server options in set-up and frustration at the inability to easily format email text.

Participants who interacted with Evolution liked the guiding steps in the mail configuration assistance, the intuitive contextual mention options to add contacts and the ability to easily access alternatives to button shortcuts in the menu.

Users reported multiple severe issues around the Evolution set-up, locating account email, message search use, formatting email text and navigating back to the Inbox. All of these issues were so major that users encountering them reported lack of trust in the Evolution package and a reluctance to continue its use.

One major fact to keep in mind is that, especially as the majority of participants were new to Ubuntu, they saw the email application they used as a representative of the operating system. This is particularly pertinent to the email system that is a system default and it should be ensured that, before either one of these products is chosen for this purpose, the severe issues reported here are addressed.