

# Approaches for Capturing and Communicating Individual Narrative Timelines Reflecting Real Life (Retirement)

MCGINLEY Chris\*; GHEERAWO Rama and SALNOT Florie

Royal College of Art

\* chris.mcginley@rca.ac.uk

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This paper describes a qualitative design research study investigated through the development and application of novel qualitative research methods and tools, developed to engage research participants, and resulting in an original means of communicating findings. The topic being investigated required working closely with older people to explore their individual experiences around the topic of retirement. The research was designed to engage and empower retirees in reflection, discussion, creation and representation of their experiences. The main project output consisted of seven retirement tales referred to as 'narrative timelines' in this paper, which were communication pieces designed to present the more 'messy' research findings towards supporting empathy in discussions affecting the creation of products or services around retirement. These rich and visual communication pieces moved beyond clichéd personas to include 'real voices' and insights into unpredictable and complex life experiences, the process aiming to facilitate a better communication and hence understanding of individuals highly personal experiences.

*design ethnography; co-creation; empathy; timelines*

## 1 Introduction

### 1.1 Research subject

Retirement is a rite of passage experienced by most people in late adulthood. However, unlike other more typically youth-oriented rites of passage (e.g. legal age to work, leaving home, turning 21, marriage etc.) this life event is typically under-studied and can be misrepresented as a homogeneous experience that is the same for all older people. Retirement takes place in a variety of ways and involves significant life changes (i.e. financially, emotionally, operationally etc.) to meet the needs and expectations of today's older people. The difficult to capture voices of those that do not follow a standard route towards and through retirement is currently underrepresented. Hence, the intention of this research was to engage a diverse group of people to ensure that the 'messiness' of lived lives was captured and communicated.



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The research intended to help reframe how retirement is viewed, by capturing significant moments and the more 'messy' elements of lived experiences (Portigal, 2008). The pre-retirement individual is the same individual post-retirement, the main change being their work status, which can be inconsequential for some, or extremely disruptive for others, in a number of different ways. In order to get a sense of the retirement experience from initial preparation through to finding one's feet on the other side, or otherwise, this project worked with 18 individual participants in order to capture a range of experiences representative of people today. We intended to garner a better understanding of the hopes and challenges people face during retirement and understand how this period in life often requires a significant amount of planning, and current products, services and systems do not always meet the needs and aspirations of today's older people.

The intended outcome of this research was to present a more realistic representation of retirement by engaging older people in the conversation and creation process, and building 'narrative journeys' around their voices, needs and expression. Participants were aged between 60-80 and their thoughts, ideas and concerns were captured through co-creation tasks, interviews and workshops. The intention was to move beyond specific stereotypes such as the frail housebound pensioner or the iPod wielding grandmother power-walking down the high street, to capture what older people themselves are saying about retirement.

## **1.2 Research Process**

Selection of participants commenced by utilising existing networks of older users established by the Helen Hamlyn Centre for Design (HHCD) in non-related projects - a total of 18 participants were engaged. The majority of participants (16) were aged between 60 and 75, this was the chosen focus due to the complexity of the transitions they face during this period. 60 year-olds entering a transition phase and 75 year-olds having gone through most typical major transitions, and hence being able to reflect upon what worked and what did not over a longer term. Two 'extreme users' (Dong et al., 2005) of 80+ were included as per the HHCD approach, which looks at extreme user groups to inform the mainstream, these individuals represented a potential 'destination point' for 60-75 year olds.

Research was conducted with people purposely drawn from the following groups:

- Across the socio-economic spectrum, going beyond a focus on the rich or the poor
- Mix of male and female across the 60-75 age range
- Involve samples from a representative range of ethnic groups found in UK
- Different health worries and situations
- Different points in retirement (i.e. about to retire, semi-retired, fully retired)
- Different family circumstances (i.e. divorced, single, near family, distant from family)
- Different geographic locations and circumstances, as environmental factors will play a role

## **1.3 Core tasks and timescales**

The start point for this project derived from a one day scoping workshop held at the HHCD with Nesta, with four researchers from ArtCenter College of Design in Pasadena also participating. 10 design researchers in total attended this one-day session, which in addition required four days of preparation and three days of analysis. From this a full proposal for the four-month study was generated, which was presented as follows:

**Month 1:** Context setting: desk research and literature review in order to refine topics and create hypotheses. Initial consultation with individual users to focus topics. Start to design the research methods and recruit users. Talk to experts in the field.

Output for month 1: Set of frameworks and hypotheses for testing in the field written up. Users recruited. Design research methods established for creation of engaging topic guide. Desk research complete.

**Month 2:** User research: test/investigate hypotheses with upto 18 older people and their families using design ethnography techniques. These could include observation, individual/group interviews and some novel techniques that encourage families to interview one another or discuss in groups. Overall, 1-2 days will be spent with each family – the majority of time is spent designing methods and recruiting participants which can be time-intensive. The user insights will be collected and curated to inform themes and design directions to be explored in the next phase of workshop.

Outputs for month 2: Six experiences captured and qualitative data gathered as video, audio, images, user quotes etc.

**Month 3:** Gather the research into comprehensible themes. Plan and deliver co-creation workshop. Workshop will discuss core issues and develop new narratives. The workshop will require intense levels of staffing and support to ensure that they are productive and informative. A team of six people will run the workshop, act as visualisers, capture the data and help to process afterwards. The workshops will last between 3-4 hours, starting with a shared lunch for the participants and researchers. Although London-focused, the workshop participants will be selected to represent a mixed sample of gender, culture and socio-economic background.

Outputs for month 3: Design ideas and further research resulting from the workshops in the form of communication pieces (e.g. video, audio, drawings, themes and ideas). A list of key questions, actions and design concepts will be developed to act as supporting evidence of need.

**Month 4:** Fully synthesise data and create dissemination outputs. Write up and sort research and outputs into a report and/or other novel output to be mutually agreed.

#### **1.4 Research Approach**

The research endeavored to investigate and capture a range of views, but was not intended to be statistically representative due to the numbers involved (18 participants in total). It was intended to highlight various patterns and, most importantly, to provide a platform for individuals to share the stories of different everyday lives, and to work with these participants to design effective communication pieces around their experiences.

This design research study was carried out by the HHCD based at the Royal College of Art in partnership with Nesta. The project used design ethnography (Salvador, 1999) methods to empathise and engage with a range of people, to record their experiences and aspirations, and to capture responses to design provocations (Norwegian Design Council, 2010). It then went through a process of discussion and co-creation to deliver ideas and outcomes. 18 older people based across the UK participated in research over a 3-month period. As a qualitative study large samples groups were not the aim, instead considering a smaller group of more targeted individuals was considered more appropriate (Formosa, 2009), but diversity was sought in individual circumstances in terms of age, gender, culture, family, wealth etc. Time (one month) was allocated for the more particular requirements for recruitment, ensuring participants were representative of a broad snapshot of markedly different experiences. The design research study examined experiential aspects of retirement from an emotional and functional perspective such as personal approaches and adjustments along the journey from pre- to post-retirement.

The initial internal working session in addition to a wealth of previous connected research carried out in the area by the HHCD was used to identify initial interest areas. This informed the design of a 'narrative booklet' - a development on the Cultural Probe (Gaver et al., 1999) delivered to participants to facilitate reflection and recording of experiences around life and guide follow-up interviews. The booklet took advantage of visual communication and aesthetic to encourage more extensive responses, and inspire reflection - it was playful, prompting, and at times provocative – the intention being to engage the participants to be open and reflective as they completed out each task. The application of 'design skills' in this instance being in the delivery of a platform for expression, in terms of a visually compelling booklet, that was created to encourage participation.

The first phase of the engagement involved delivering the booklet to 18 pre-selected people that brief discussions had already been carried out with to explain the nature of the research. This presented a range of creative tasks relating to their retirement attitudes and experiences (Figure 1). Their responses were followed up one to two weeks later with interviews held at each participant's home, which allowed them to elaborate upon their answers and discuss their responses further.

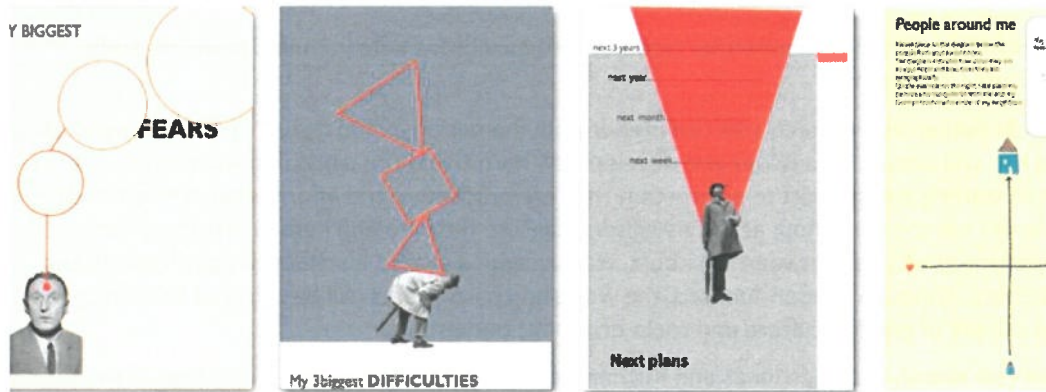


Figure 1 – Narrative booklet containing creative tasks framed around the retirement experience

## 2 Information capture through ‘narrative booklets’

The design of the booklet was a critical component of the research, not only was it sent ahead prior to face-to-face meetings, it was also the primary means of data capture of individual experiences and the bridge for follow up interviews (Figure 2). The material generated from these was intended to elicit unique individual experiences of retirement and develop genuinely representative characters and storylines based on the individuals and themes established from the engagements.



Figure 2 - Follow up interviews



The booklet's 20 pages of exercises intended to creatively engage participants in self-reflection, and provide a platform to externalise experiences and hopes in relation to the process of retirement.

As participants progressed through the booklet, tasks prompted them to be increasingly reflective and expressive. The first page began with simple questions asking for personal details such as age and profession. It continued onto more reflective questions from which anecdotes and histories could be expressed. Some questions were designed to help establish rapport and work as conversation prompts in the later interviews. Other questions went beyond 'written' responses prompting participants to, for example, literally draw how they felt other people perceived them. Participants were asked to capture different aspects of their lives; talk about their dreams; describe their worries; draw their passage through life and so on. This allowed specific topics to be explored as well as unexpected themes to emerge.

Provocation exercises such as 'My 3 Biggest Difficulties' (Figure 3), gave people the opportunity to express frustrations such as health-related issues – 'current injury to hip'; social relationships – 'relating to my son's girlfriend'; and lifestyle – 'changing some habits of a lifetime that get in the way'.

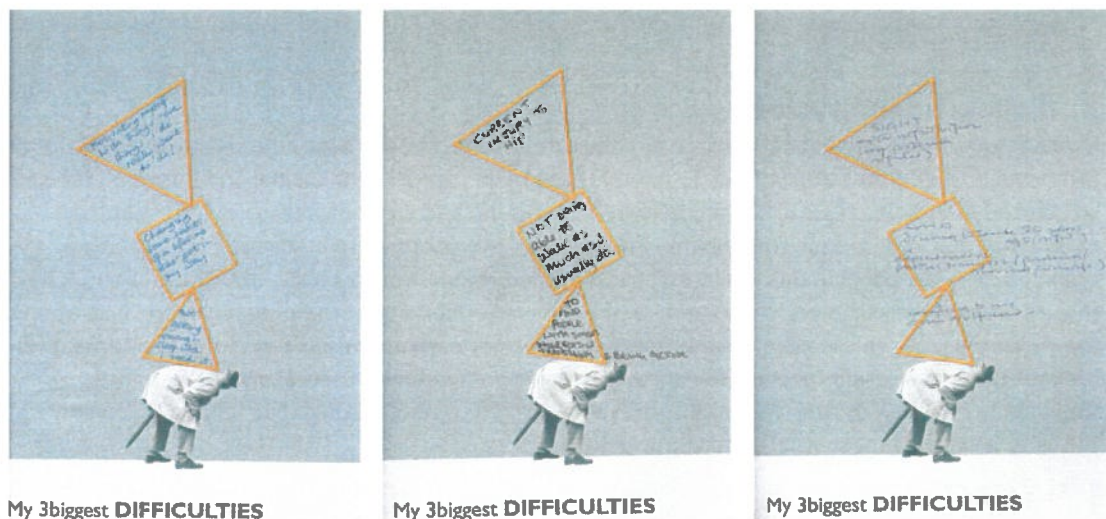


Figure 3 – 'My 3 Biggest Difficulties' responses

The 'I Dream of' (Figure 4) exercise openly prompted people to go beyond the everyday and talk about dreams and aspirations. This gave perspective on their lives at an aspirational and emotional level. Some spoke of more immediate self-improvement such as 'being this energetic, dynamic creative person', whilst others expressed lifetime goals such as 'making a mark before I die.'

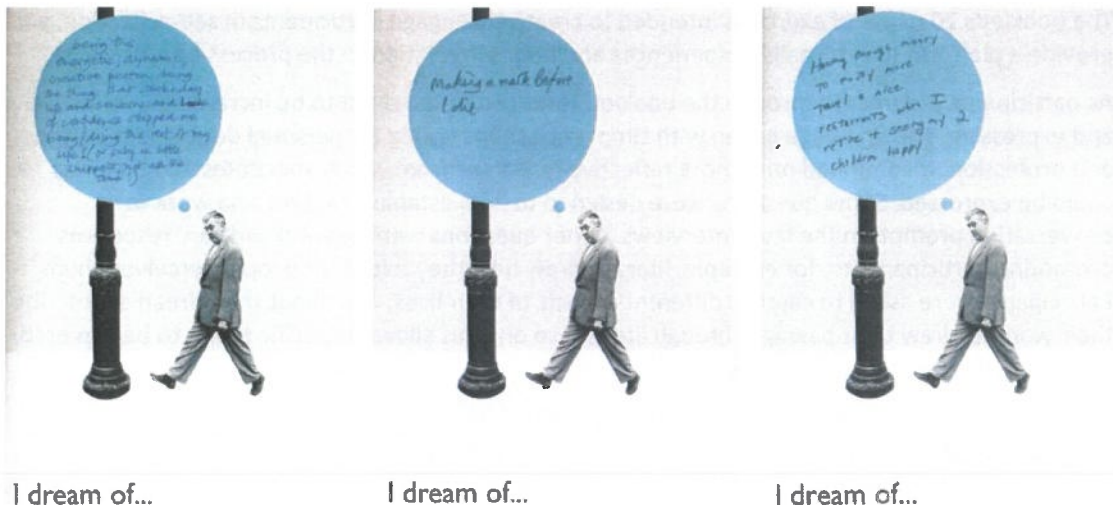


Figure 4 – 'I Dream of' responses

### 3 Follow up interviews

It was suggested to participants that they complete the workbooks over a three-day period prior the interview at their home carried out by one of the project researchers. Casual and informal, the semi-structured interviews typically lasted between 2-4 hours, and were based around the material people had self-recorded in the booklet. This allowed the contents to be directly discussed and qualified with the participants whilst still fresh in their minds. For example, the 'Piece of Your Life' (Figure 5) exercise asked people to write a personal reflection about their life along an illustration of the rings of a tree. This was an open prompt allowing participants to self-select the segments of their life that they felt were important to express. The reasoning behind their answers was more thoroughly qualified during the visits as they were asked to read through the piece and explain why this was what they most wanted to communicate.

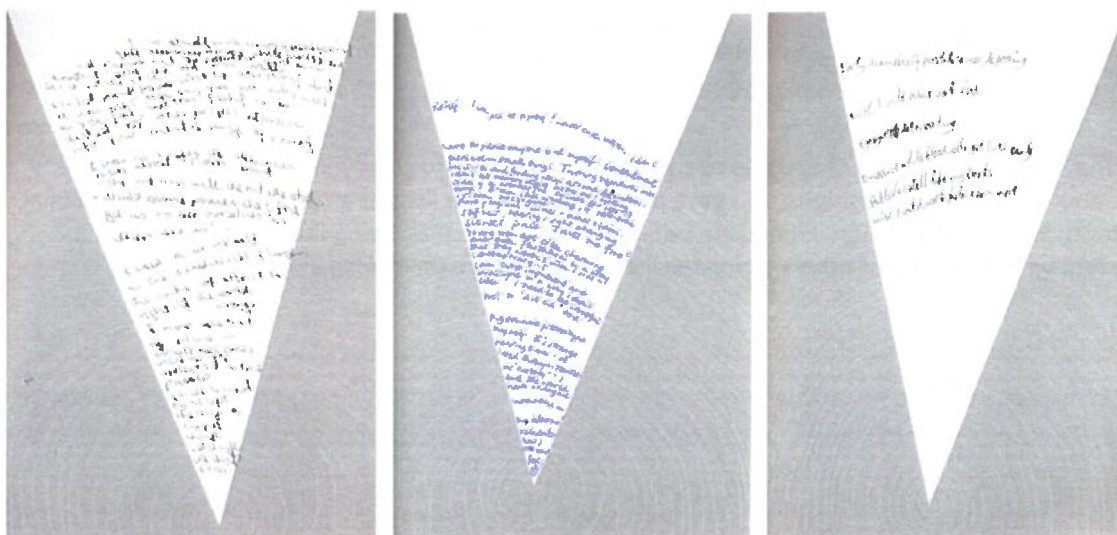


Figure 5 – 'Piece of Your Life' responses

The information gathered helped to identify recurring issues and emerging themes across the group, which formed the basis of the initial 'narrative timelines'. These timelines were a series of communication pieces intended to capture and communicate the individual experiences in an efficient and empathic way.

## 4 Development of themes

The research identified that people take to retirement in different ways. Some embrace it, some ignore it and others simply do not retire. In many cases different approaches were taken and adapted in an ad-hoc way dependent upon the individual's life and situation. Retirement often happened in a way that was not predicted, some having positive experiences and others more challenging ones. These complexities were captured to aid understanding of the variety of potential experiences.

Life after retirement had some common themes, with life and time being largely structured around three key areas: leisure, people and task. This aligned with previous research undertaken by the partner on the project (Khan, 2013) The participants' focus on these varied immensely but all were a common thread that ran throughout the data produced by the research.

These themes formed a framework around which seven characters and their associated timelines were developed. They are defined as follows:

**Leisure:** This relates to time spent on non-work related activities such as hobbies, vocational pursuits or simply relaxing. It is about recreation and reflection. This theme is illustrated by the following participant quote -

*"I spend my time doing things that interest me. I started a degree in sociology. It was just something for me. It was something I had always wanted to do."*

**People:** This looks at relationships, companionship and connections with people. This could be with family, friends, networks, special interest groups, social groups or situations. This theme is illustrated by the following participant quote -

*"I love people. At times when I worked I was too busy, but you have more time when you retire to connect. And I think you're more approachable. You're safe."*

**Task:** This relates to things people are obliged to do. Day-to-day activities and focused duties that can be considered 'work' rather than 'leisure'. In retirement this may be a more casual or voluntary role. This theme is illustrated by the following participant quote -

*"I like tasks, things with a beginning and end, that need to be done. Sometimes to help others – that's satisfying."*

## 5 Development of timeline framework

Although the event of retirement is a single moment in time, the fuller experience reaches beyond this single moment. It was apparent from the research that the build-up to this moment and the progression after was interconnected and had a bearing on the participants' current lives. In order to capture and communicate the fuller retirement journey the research was compiled around 'preparation' prior to retirement and 'adaptation' post-retirement:

**Preparation:** The period before retirement mainly concerning varying degrees of planning that can take place. This included rethinking daily routines and structures.

**Adaptation:** The period after the retirement moment focusing on the implementation of new plans or the adjustment of previous routines. This involves much more than a simple change of work patterns.

## 6 Co-creation workshop

A workshop was then prepared to explore and corroborate the identified themes established during the first phase of research, and to further develop the characters and timelines through co-creation tasks responding to the initial draft timelines. During the workshop initial findings and themes were visualised in a presentation and accompanying co-creation workbook that was used to engage a

group of six retirees partnered by six design facilitators in a number of exercises. This built upon the information gathered from the original booklets and interviews, and helped crystallise findings. The main purpose of the workshop was to ensure initial findings were supported by those that contributed to earlier research, and to gather material to further detail and develop the narrative timelines. In addition, the workshop was used as a pilot test of the initial drafts of the narrative timelines, the participants were asked to carry out a series of tasks based around the timelines that had been developed. They began by interrogating the experiences portrayed to ensure they were considered accurate and believable, based on their own experiences and those of people they knew, before moving onto other tasks. One of the tasks was to address recurring statements that emerged about retirees in the interviews. This selection of statements drawn from the earlier interviews presented as the 'Myths of Retirement' (Figure 6), and the participants were asked to provide their input on the statements and opinions, drawing firstly from their own experiences and secondly from the experiences presented to them through the timelines.

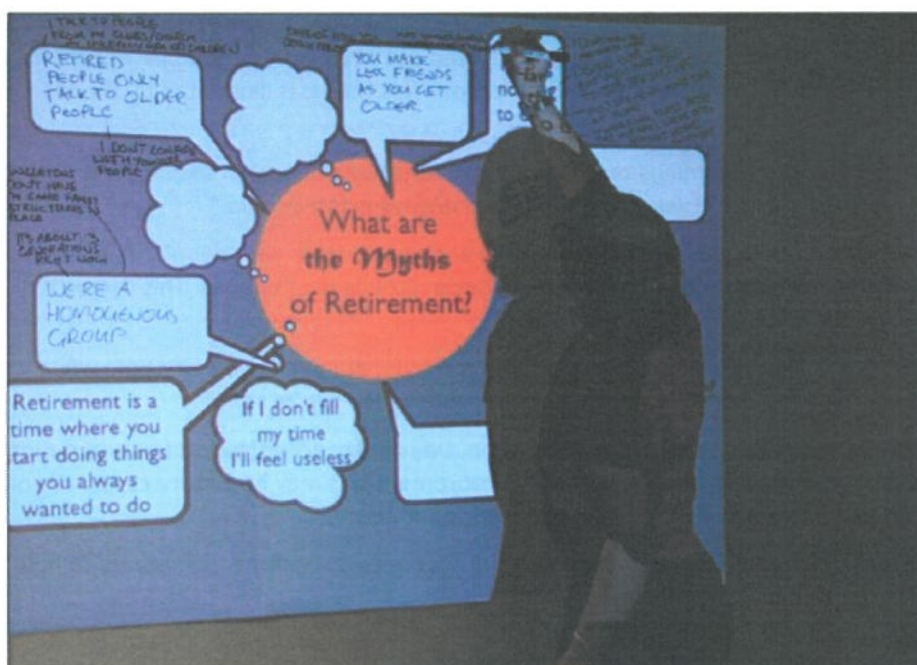


Figure 6 – Myths of retirement co-creation task

### **Research outcome**

The main outcome of the project was seven retirement tales embodied in and communicated as 'narrative timelines' (Figure 7) based on the individuals involved in the research, directly presenting the voices and concerns revealed through the research.

The timelines aim to provoke conversation, assist interrogation and challenge assumptions for anyone involved in addressing retirement. The timelines present a more realistic view of the different ways in which people transition through the retirement moment. They look at what is easy, what is challenging, and how such situations are approached. These seven 'characters' were divided across the three themes of People, Leisure and Task (Figure 8). For example, within the 'People' theme was 'Mother Hen', who found fulfilment in looking after her family but neglected herself as a result; within the 'Leisure' theme was 'Deep-ender', who was forced out of the workplace and into retirement unexpectedly and undeservedly; within 'Task' is 'Surprised' who had to retire in his 50s due to alcoholism and having now found stability is struggling to find fulfilment.



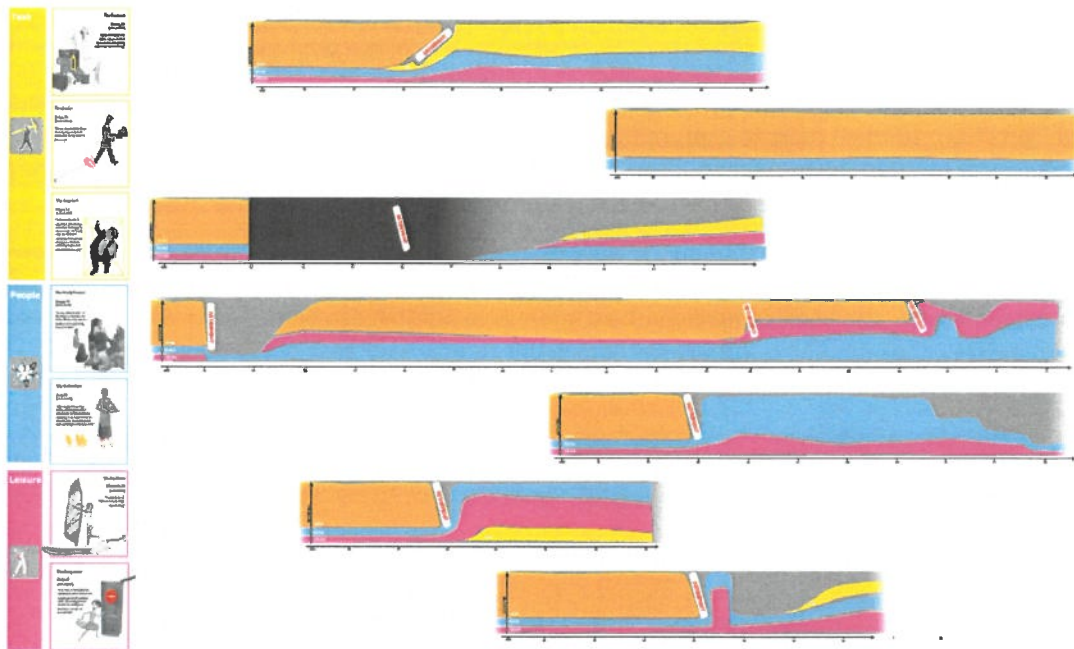


Figure 7 – Overview of seven distinct retirement timelines



Figure 8 – Characters grouped by theme

One 'character' in each area made a positive transition into retirement and 'found their feet' whilst the other finds it difficult. This aimed to give a truer representation of the range of older people's experiences and go beyond the imaginary persona or retiree stereotype to show a range of very different real-life experiences.

The characters draw on the experiences of the participants and use individual quotes and anecdotes gathered from the research. Although the characters are written based on individuals, they are

depicted using illustrative non-specific photographs as the aim is to use them to provoke response and provide perspective on an individual experience rather than focus on a individual person.

Each 'character' is depicted within a retirement journey (i.e. a timeline) typically presenting highlights from 10 to 20 years to capture their situation pre- and post- retirement. Direct user quotes were used throughout the journeys in order to bring these timelines to life and ensure they were representative of the people involved in the research.

The timelines were physically embodied (Figure 9) as scrolls of upto two metres length, which could be easily transported and unrolled for consideration in workshops and similar occasions. More recently the timelines have also been compiled into an interactive pdf that can be easily scrolled through on tablet devices, the intention of compiling them in this format is for ease of distribution and use.

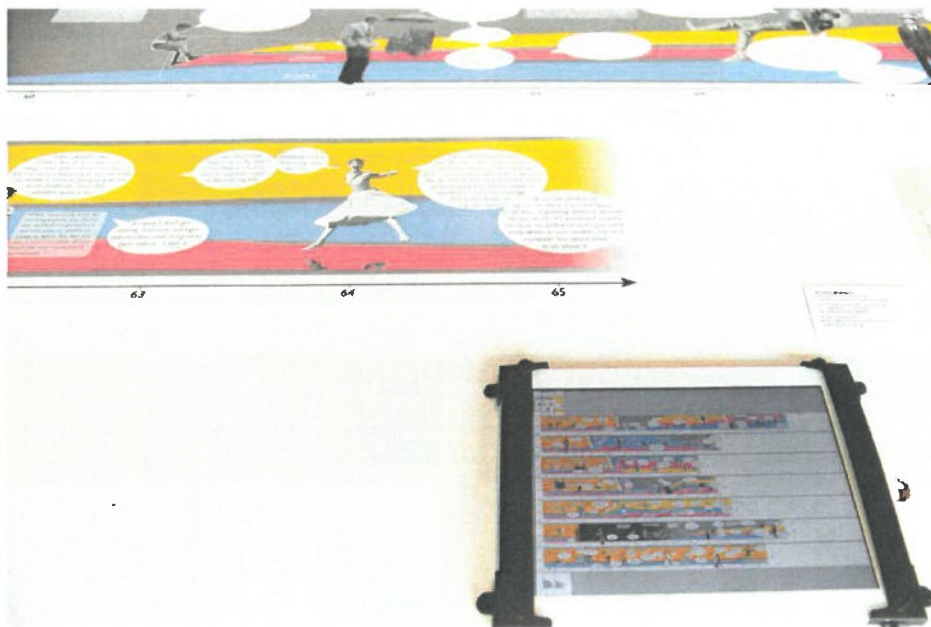


Figure 9 – Retirement scrolls and iPad interactive pdf

One example from the narrative journeys was the retirement tale of Nigel. His journey starts at the age of 54 when he is happily married and a successful professional (Figure 10). When his wife dies when he is 55 and he falls into alcoholism (Figure 11).

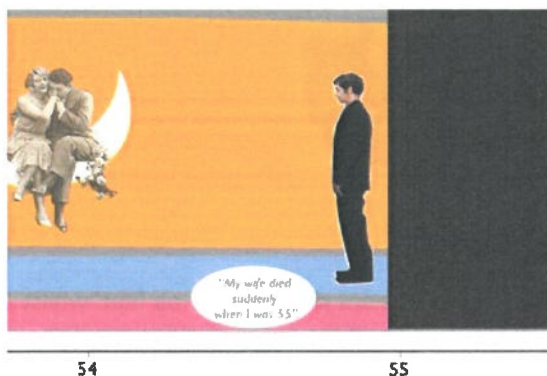


Figure 10 – Nigel timeline segment 1

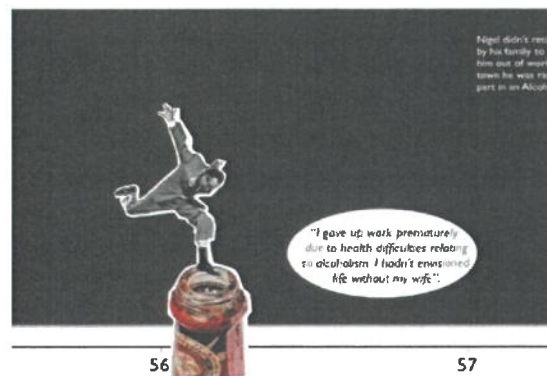


Figure 11 – Nigel timeline segment 2

This example is amongst the more ‘messy’ in that, using the participant own words, he ‘didn’t retire as such’ but instead ‘chucked it’ (Figure 12). The timeline continues to elaborate on his experience and recovery over a period of 10 years, until he eventually finds his feet and begins to evaluate his position in life, his anxieties and his concern over how he can again contribute to society (Figure 13).

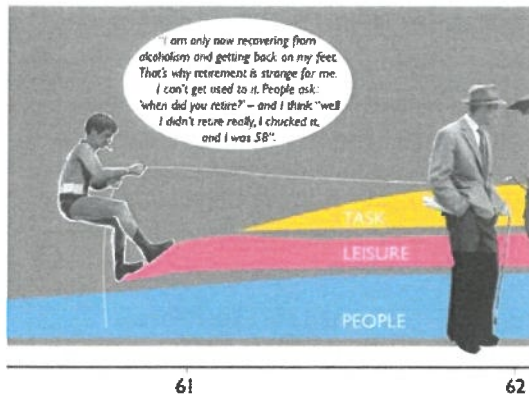


Figure 12 – Nigel timeline segment 3

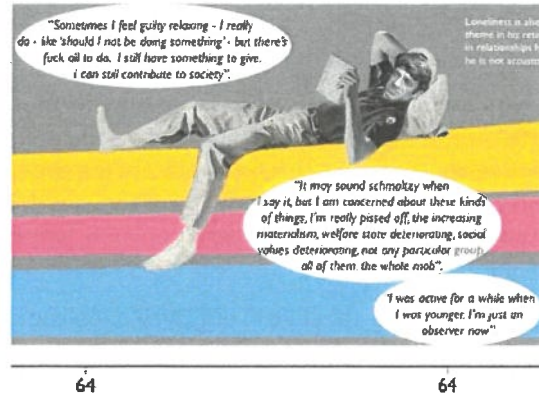


Figure 13 – Nigel timeline segment 4

## 7 Discussion and conclusion

The research in this project answered many questions; however, in addressing a complicated issue it also highlighted new areas that need future focus and exploration. For example, an unexpected result of the distribution of the booklets to participants was demonstrated in several cases where the booklets became a tool to instigate and mediate difficult conversations around retirement with family members and close friends, allowing topics that had never broached before to be discussed. These included issues such as legacy, personal fears and even unvoiced irritation with another family members perspective. During the interviews many people commented that the booklet added another dimension to their responses and helped them unpick new perspectives. This aspect of the research highlighted potential for further work exploring ways to use design enable retirement discussions, and allowing family and friends to reflect upon the motivations and support decisions made during retirement journeys.

The narrative booklet was considered an effective means of engaging participants and supporting follow up interviews. The material generated in combination with the co-design workshop informed the creation of seven narrative timelines that were successful in telling seven very different retirement tales. The intention to communicate complexity over a timescale, helped take the material further than static and fictional personas (Portugal, 2008). The material was embedded with the real stories, viewpoints and comments of the participants, which made the timelines compelling and went some way towards evoking a level of empathy (McGinley and Dong, 2011) with the individuals being represented.

The pilot test of the narrative journeys in the co-design workshop assisted in the generation of creative and compelling ideas and creative outputs. The ‘retirement journeys’ were further explored in a four-person session of academics and an innovation manager from a major charity to explore how they might be used in future workshops. Potential future uses identified were in workshops, think-tanks, ideation session and in brainstorming scenarios where the direct voices of diverse retirees are usually missing. This aligns with the hopes of the project, the timelines do not aim to replace real people but offer a tool to stimulate conversation, envision scenarios and virtually test situations. The timelines were considered successful in succinctly presenting textured human stories to an audience that do not need to be fluent in ethnography or design thinking. It effectively communicates the needs and the aspirations of retirees into frontline consideration by providing engaging textual and graphic representation that inspires new thinking and stretches perspectives.



They can be used by anyone as part of a body of material to create more relevant and people-centred ideas, products, services, systems and environments that relate to retirement.

The research has limitations, the timelines developed were specific to the retirement project, they depicted seven retirement journeys selected from 18 participants to highlight as broad a range of experiences as possible. However, the set could potentially be expanded to include many more interesting and diverse retirement experiences.

There is another obvious limitation in that the timelines are framed around the specific subject matter - retirement, this was intended, as the topic of the research. However, it is considered an effective approach to focus on significant life events, and future timeline development for other projects could similarly use this kind of focus as this approach proved useful in stimulating response and conversation - everyone had an opinion, which in turn contributed to the development of rich and informative timelines.

The approach was effective in engaging people in considering their varied life experiences, broadening conversations in the research. The finished timelines have been used in a number of workshop sessions to explore the user experience around retirement with policy makers, insurance companies and the general public. In these sessions they have acted as a tool to help people interrogate ideas and identify opportunities for change.

This project identified ways to move beyond the static persona, and attempted to capture a 'messier' lived experience. There are of course limitations to the depth that can be captured around a lived life experience in a communication piece, even with a longer period of experience being examined; however, these timelines go some way towards moving into a more dynamic representation, a pursuit which the researchers on the project continue to investigate.

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### About the Authors:

**Dr Chris McGinley** is a Research Fellow at Royal College of Art, where he leads the Age & Diversity research space at the Helen Hamlyn Centre for Design. He is an award-winning people centred designer, researcher and writer.

**Rama Gheerawo** is the Director of the Helen Hamlyn Centre for Design. He is the RCA Reader in Inclusive Design and has worked in the field of inclusive design, social innovation and creative leadership for over two decades.

**Florie salnot** is a service and user experience designer currently based in Hamburg. She uses design thinking to plan and design sustainable digital products and services creating value for individuals and organisations.