

Card Sort (open and closed)

What is it?

This technique involves asking participants to sort topics into categories that make sense to them. It is mainly used for websites, though not exclusively. It can be completed with pre-defined topics that people have to sort into agreed categories (closed card sort) or people can sort them into their own categories (open card sort).



It can be run with groups or individuals and is quick, cheap, simple and easy to do. It provides a good foundation to further research.

Things you need

- Topic cards e.g. list of website content
- List of agreed categories (closed card sort)
- Post-its and sharpies (if asking participants to create their own cards)
- Camera to take photos of completed sort
- Note pad and pen
- Voice recorder
- Quiet space to run session
- Facilitators (number will vary depending on the size of the group)
- Time – 30 mins - 60mins



How to do them

1. Prepare the initial cards and if necessary, the categories you want to sort into.
2. Limit the number of cards. Maximum recommended is 30-40.
3. Arrange time and space for the session.
4. Agree to either record or take notes of the session.
5. Show the participant(s) the cards and explain the purpose of the session.
6. In a closed card sort, you will have provided the categories to sort them cards into, in an open sort the participants will choose their own. Give directions to the participants about how you want them to sort the cards.
7. It can be useful to ask the participant(s) to talk out loud whilst sorting, so that you can understand their thoughts and rationale. Make sure you note which card(s) they are referring to when they are talking as it may not be clear when analysing the data after the session.
8. At the end of the sort, ask if there is anything the participant would like to add / ask. e.g. is there a card left 'unsorted'?
9. Take photos of the completed sort.

