Content and Usability Testing

The Small Business Research and Policy Website

Final Report and Conclusions

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Submitted to:
Small Business Policy Branch
Industry Canada

EKOS RESEARCH ASSOCIATES

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1.0
Introduction

This report summarizes the findings obtained from a series of focus groups undertaken during the last two weeks of February 2002. The purpose of the research was to examine and test Industry Canada's Small Business Research and Policy (SBRP) website.[1]

Launched recently, the SBRP website is designed to encourage small business researchers and policy analysts across Canada to share information on small business research and policy-making. The web site includes an extensive database of research literature on the subject of small business and entrepreneurship, recent research reports on small business financing, small business statistics, a discussion forum, and lists of researchers and policy development offices across Canada.

In broad terms, the objectives of the research included the following:

» Obtain feedback from potential end-users on how to improve the SBRP website to become a more effective tool for its users specifically by identifying content and functionality improvements; and

» Development of recommendations for the future direction of the SBRP website.

It should be borne in mind when reading this report that these findings are drawn exclusively from a qualitative methodology. While every effort is made to balance various demographic characteristics when recruiting participants, these groups (and therefore the findings drawn from them) may not be said to be representative of the larger population as a whole. While groups generally indicate appropriate directionality, they do not serve as a proxy for a fully representative quantitative methodology.

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[1] These focus groups were conducted on the same day as the usability testing for the Financing Sub-Portal also done on behalf of Industry Canada as it allowed for significant costs savings given that much of the expenses had already been incurred with this other project (e.g., travel and travel time).

2.0
Methodology

The study explored both functionality and content-related study issues. In broad terms, the overall approach featured four focus groups across the country with potential end-users of the website, including public servants, academics, students, and representatives of other organizations (e.g., Canadian Federation of Independent Business).[2]

The approach to the focus groups stressed hands-on participation, with participants having their own computer with a live high-speed Internet connection. At the beginning of each session, participants were given the opportunity to navigate the FSP based on their own needs and curiosity. Following a discussion, participants were asked to work their way through different scenarios in order to obtain feedback based on a common point of reference. Finally, participants were asked to complete a workbook to assign overall ratings, identify key strengths and weaknesses, and essential requirements of the SBRP website for it to be useful to them.

Each focus group lasted one and a half hours and included the participation of four to eight individuals. The focus group moderator's guide was developed in close consultation with the client. The research involved the participation of 24 individuals in total.

One focus group was conducted in Ottawa, Montreal, Toronto, and Vancouver. The final composition of the focus groups is shown in Table 1.

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[2] Industry Canada was responsible for the recruitment of the participants.

Table 1
Composition of Focus Groups

Location	Number of Participants
Ottawa	5 participants
Toronto	4 participants
Montreal	8 participants
Vancouver	7 participants

It should be noted that technical difficulties were experienced during a number of the focus groups. In particular, the usability testing was done in Ottawa, Toronto, and Vancouver using a "demonstration" site burned on to a CD. The difficulties in all three centres were identified as attributable to the Strategis website as all other Government of Canada websites were fully functional during these focus groups. The usability testing conducted using the "demonstration" site still produced a clear set of findings on how to improve the SBRP website.

Many of the same difficulties still existed at the report writing stage. For example, much of the website was not accessible during the early part of the week of March 18th.

3.0
Summary of Key Findings

While some differences existed between participants, a number of key findings were evident.

» While some participants were aware of the Small Business Policy Branch within Industry Canada, awareness of the SBRP website was low. This is not surprising given that the website was only launched in early January 2002.

» Despite a number of perceived limitations, the SBRP is definitely seen as a step in the right direction, and identified as useful. The concept of a one stop website or portal has a lot of resonance. In terms of content, overall reaction to the SBRP was positive. In fact, most participants viewed the subject matter as relevant and not readily available in a single source elsewhere. Within this context, the SBRP was seen as filling an important gap. On the other hand, the most common criticisms related to the perception that the website is "light" on content in many areas. This is particularly true in some parts of the website (e.g., the Policy section). Again, given the relative newness of the website and the fact that it is still under development, these remarks were to be expected.

» The extent to which individuals can be expected to use the website will depend on how much they see it filling a void for them. For example, some academics indicated that they have access to certain types of information through various journals, but have limited access to government studies.

» Given the fact that much of the usability testing was done using a CD version, it is not possible to make definitive conclusions on the overall ease of locating the website on Strategis. Generally speaking, however, the website should not be considered easy to locate (based on those who were able to search for the SBRP website). Moreover, many of those participants who were familiar with Strategis commented on difficulties in locating things on the website.

» Perceptions regarding the overall look and feel of the website were mixed. Some participants liked the approach adopted while others did not. Given the target audience for the website, it is reasonable to assume that potential visitors — like many of the focus group participants — will have relatively high levels of Internet skills, and are therefore more capable of using the website regardless of its design.

» Similarly, the perceptions regarding the overall navigability of the website were mixed. Many found the four broad sections easy to use, but struggled when they were navigating within each of these sections. Moreover, there are parts of the website that do not fit uniquely into one of the four sections, and instead cut across various sections (e.g., the Related Websites page on both the Research and Statistics section).

» There is general interest in having different statistics on the website given how much the target group relies on them. Few specifics were given on what statistics they were particularly interested in, although more is seen as better.

3.1
Key Requirements

Potential users will only turn to the SBRP website if it is useful and relevant to them. Within this context, participants were asked to identify in their workbooks three key requirements that the SBRP needs to have in order for them to use the site regularly.

A number of key requirements were identified:

» A sense of credibility and support (i.e., it will be an ongoing initiative with the website being properly maintained and updated).

» A comprehensive listing of <u>quality</u> research papers on SMEs.

» Easy to access (and free) data on SMEs.

» The inclusion of actual documents, and not just a description of them.

» Regarding the Discussion Forum, if it is to be used, there is need to be able to engage in discussion with "experts".

» A better sense of "works in progress" whether it is research or policy initiatives. This would enable users of the website to know what work is currently being undertaken (e.g., research that will be published later).

» More information beyond government activities (e.g., NGOs).

» A better search engine, with the ability for greater refinements (including a key word search).

» A focus on both the national and regional research issues, including more emphasis on local issues (e.g., what applies in B.C. may not be relevant in Ontario).

» The inclusion of a frequently asked questions (FAQ) section.

3.2

Strengths & Weaknesses

The workbook asked participants to outline in their workbooks what they believed were the strongest and weakest aspects of the SBRP website.

Key Strengths

When asked to identify the strengths of the SBRP website, participants tended to have similar viewpoints. The most common strengths included:

>> The fact that the federal government is responsible for the website.

>> That it provided a "one stop" location or portal on this type of information. Many participants viewed this information as not being readily available elsewhere and saw the SBRP as filling a gap.

>> Usefulness of some of the information.

>> Several participants felt that the discussion forum would be in theory a valuable interactive tool by facilitating the dissemination of knowledge on issues related to research and policy.

Key Weaknesses

When asked to identify the website's main weaknesses, three key things were identified:

>> The most significant concern articulated by participants was that the site, as a whole, lacked content. This was particularly true in relation to the policy section, and there was a perceived need for more non-government related content. Closely related, the relevance of some of the content or parts of the website was not clear (e.g., it was not clear why someone would want to add his or her name to the "Research and Policy Network").

>> There could be improvements to the overall navigability to the website as some found it difficult to use (although not all participants felt that this was the case).

>> The erroneous assumption that individuals will know what certain acronyms mean (e.g., what is meant by SME).

4.0

Specific Findings

This section of the report is devoted to a presentation of detailed findings on specific aspects of the SBRP website, broken down into its four main sections.

>> Research;

>> Policy;

>> Statistics; and

>> Research and Policy Network.

Each subsection presents an overview of participant reactions and main suggestions for improvement to different parts of the website. It is important to note that, in some instances, consensus across groups was neither obtained with respect to reaction, nor suggestions for improvement. The findings presented below, therefore, capture a range of views on four broad aspects of the SBRP website.

This section ends with a summary of the ratings assigned to the SBRP's major sections.

4.1

Research

SME Research Database and SME Financing Data Initiative

These two components of the website could not be completely assessed given the difficulties encountered during the usability testing. That being said, a number of findings can either be drawn directly or indirectly from other related research.

» Most participants were disappointed only to find high-level information about any particular study such as the author's name, the full report, and when and where the study is published. Instead, participants expressed strong interest in being able to access the full report (or download it in a PDF format).

» Other participants remarked that some of the abstracts were out of date, and that many could not find the latest research. One suggestion was that the database includes research presented at conferences and seminars.

» The search engine's problems are similar to those found on the Financial Sub-Portal website. From the recent usability testing done on the FSP, the search engine's functionality was found to be cumbersome and not as refined as what users expect.

» The website enables individuals to submit a new reference online. Some participants remarked that the website is not clear on the publishing policy, and many expressed concern that they would not want anything submitted and accepted unless it met a certain standard.

Canada Small Business Financing Act

No strong views were registered.

General Research Reports

While there was some relevance to the four research reports, it was noted that it would be more useful to have a more comprehensive listing of general documents. As it stands, the link only has reports commissioned by the Small Business Policy Branch. Many participants felt that other research reports from other government departments and non-governmental organizations should be included, as well as international small business research reports.

Related Websites

The inclusion of related websites generated mixed feelings. While the inclusion of related links is useful in general, a number of suggestions were made, including:

» The related websites are listed in both the "Statistics" and "Research" links, although it is not obvious that they provide the same information. As such, there are links that are not related per se to Research (e.g., ExportSource: A Guide for Exporters).

» The page is labeled as "Statistics" even though it is in the "Research Section".

» The ordering of the various links is also not clear.

Many participants felt that related websites or links to other websites could be a new section to the SBRP website in addition to the four existing sections rather than the way it is currently duplicated in the Statistics and Research sections. Some suggestions for other links included the Conference Board of Canada, the CD Howe Institute and the Fraser Institute.

Policy

Policy Development Offices

Generally speaking, the inclusion of the coordinates of small business policy development offices and personnel across Canada is seen as a useful and relevant for this website. Participants said that they could see themselves making use of this information. Moreover, the inclusion of federal and provincial contacts added to the comprehensiveness of the list.

While not mentioned explicitly, the layout of the information was seen as needing improvement. In part, this reflected some of the website's unnecessary steps. This was evident in the Federal Small Business Policy Contacts. On the first click, visitors are provided with an alphabetic list of Federal Government Departments with small business contacts. On the next click, visitors are provided with the same list of Departments (in the same order) and with the individual(s) name and contact information. In other words, there is no need for the first page.

Plans and Other Policy Documents

During the website testing, there were three documents listed: Industry Canada's Small Business Policy Branch Strategic Plan; Industry Canada's priorities for 2001-02; and a link entitled "Growing Small Business".

While the addition of the "Plans and Other Policy Documents" link was seen as relevant, this section was most likely to be seen as lacking content. Most participants believed that the three documents were far from comprehensive, and the lack of other documents suggested that not enough thought had been given to this part of the website.

Some participants suggested that the SBRP website include documents that may not be SME specific, but have information on topics that could have an impact on SMEs. Examples that were given included documents that are often produced by the Canadian Federation of Independent Business (CFIB), HRDC, as well as elements of federal and provincial budgets that are relevant to SMEs.

4.3

Statistics

Small Business Quarterly (SBQ)

While few participants were familiar with the Small Business Quarterly (SBQ), its inclusion was seen as adding value to the website.

The main suggestions for improvement included:

» Make it easier to assess what information is included in each quarterly report. Currently, the link only provides the descriptive information (e.g., Small Business Quarterly Report – December 2001, Vol. 3, No. 3). As such, there is no way to quickly browse the various reports to see if they contain relevant information.

» Even when one clicks on a particular SBQ, the information is still not easily identifiable (and is not clear how it differs from other volumes). One way to improve this section might be to include an overview of each of the different SBQs as well as the full documents in a pdf format with a table of contents.

» While not mentioned explicitly, the way in which the title Small Business Quarterly is repeated on every line is another example of the way in which the website is repetitive.

Frequently Asked Questions

In general, the inclusion of frequently asked questions (FAQs) is seen as useful. That being said, a number of comments were made.

» Not all participants saw the pdf version.

» The placement of the FAQs in the Statistics section did not make sense for all participants as some are related to statistics and some are not.

Related Websites

The same comments in the Related Website under the Research section of this report apply.

4.4

Research and Policy Network

Small Business Researchers and Policy Analysts

Reflecting the perceived usefulness of contacts overall, the list of researchers and policy analysts in this section was seen as a relevant link. The main suggestions for improvement include:

» The list was seen as being incomplete.

» The benefits of adding one's name to the database are not mentioned and should be.

» There was also uncertainty on how it would work (i.e., the website currently says "expressions of interest to be included in the list are invited). Likewise, participants could not identify researchers based on a particular expertise.

Calendar of Events

In general, the idea of the Calendar of Events tested favourably, and most participants saw this as a useful and relevant feature. The main comments included:

» The layout of the information could be improved. Suggestions include:

- Organizing the information geographically, either on a national/international basis or even within Canada (assuming there is enough content for a provincial breakout).

- Providing a short description about the nature of any particular event. As it stands, individuals must click on the external link to find out the background of any one event.

- There should be an archive of past events that often can provide useful information and/or contacts.

Discussion Forum

While the technical difficulties encountered prevented a full exploration of the Discussion Forum, a number of findings emerged with the concept in general.

» The concept of a Discussion Forum appealed to many participants. For others, however, they had trouble imagining how it would work and how it would be of any use to them. In many ways, this aspect generated more questions than interest among participants. Some of the questions were technical in nature (e.g., "what do I do?", "it is a forum or a bulletin board?").

» It was clear, however, that participants had high expectations about what purpose the Discussion Forum would serve. Moreover, interest in such a feature would rapidly diminish if the Forum did not live up to their expectations.

» Participants' main expectations of the Forum include:

- There is a clear benefit to participating in the forum (e.g., participation among individuals with a common interest in a particular topic).

- There is participation of experts.

- There is regular participation. For example, one participant remarked if there was no response to his question/query within a week or so, he would be unlikely to come back. In other words, the challenge is how to keep the discussion "alive" — how to facilitate participation and encourage further discussion.

Research in Progress

Reactions to the "Research in Progress" link on the website were generally mixed.

» The ability to update information directly online has appeal for most participants.

» On the other hand, most participants were disappointed with this section given that it was only a means to contact the website about work in progress. Rather, participants felt that this section should be more of an overview of what is currently happening to keep them current vis-à-vis research.

» Some participants suggested adding either a newsletter or a "what's new" section to the website featuring new research papers, events, etc. This could help inform individuals about what is happening, and encourage repeat and regular usage of the website.

4.5
Ratings

At the end of the focus groups, all participants were asked to rate various aspects of the site, having had a chance to work their way through the SBRP website. Table 2 summarizes the ratings, and provides both an average score on a 7-point scale and the number of participants assigning high ratings (defined as either a six or seven on the scale)[3].

Consistent with the broad findings, various aspects of the site were seen as stronger than others. The highest ratings were in relation to the quality of the information and its usefulness/relevance, and its overall appearance. That being said, those assigning high ratings on these three measures never exceeded a third of the 24 participants. On the other measures, no more than 3 of the 24 SME participants assigned high ratings.

Table 2
Ratings

Criteria	Average Rating	Rating of 6 or 7
Overall appearance	4.4	4
Ease of use	4.1	3
Layout of information	3.9	2
Search results	4.0	2
Usefulness/relevance of information	4.6	4
Quality of the information	4.9	7

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[3] The scale ranged from 1 to 7, where 1 is extremely poor and 7 is extremely good. The average ratings are based on the responses of 24 participants.

5.0
Recommendations

Despite the fact that certain aspects of the website could not be fully tested due to technical difficulties, the research findings point to a number of recommendations.

1. The SBRP is considered a worthwhile initiative, and thus more should be done to improve the website. Most participants saw themselves using the website if it evolved in a way that was useful and relevant to them, and see it as a filling a void. For example, academics may have higher expectations given their well-established existing networks.

2. There is a need to build awareness. While it is a recently launched website, there was virtually no awareness prior to the focus group testing. Moreover, the website is not prominently displayed on Strategis. As such, even though Strategis may be well known, many visitors would not necessarily notice the SBRP website.

3. There is a need to review the SBRP website's content, with a view to expanding key sections as well as looking at how the content is organized. A number of sections are seen as "thin" on content, and only cover a portion of what could be included.

4. Closely related, the website's content should be reviewed for layout. While the overall design is based on four categories, they are, in fact, not really watertight. There is, for example, the same related websites link in two of the four sections. Many of the same weaknesses in layout observed in the Financing Sub-Portal (FSP) usability testing were evident in this research.

5. The Discussion Forum should be developed with caution. Participants have high expectations on this front, including the regular participation of experts and/or established individuals in the field. This is a feature that is not likely to be a "build it, and they will come" approach. Rather, considerable advance work needs to be done to ensure the regular participation of experts and/or established individuals. Otherwise, it is possible that many participants will be disappointed in this feature and far less likely to continue their participation in it.

6. While not tested directly, the search engine's problems are similar to those found on the FSP website. From the recent usability testing done on the FSP, the search engine's functionality was found to be cumbersome and not as refined as what users expect.

Appendix A: Moderator's Guide

Content and Usability Testing
Small Business Research and Policy Website

Moderator's Guide

A. Introduction   (5 minutes)

❖ The purpose of this research is to provide the Government of Canada with feedback from the research and policy community on the Small Business Research & Policy website, recently launched by the Small Business Policy Branch at Industry Canada.

❖ The groups are being audiotaped and observed by members of the research team. Comments are completely confidential.

❖ No right or wrong answers. We are looking for honest opinions.

❖ Okay to disagree. Please speak up even if you think you are the only one who feels a certain way about an issue. Also okay to change your mind based on things you hear or on new information.

❖ One thing in common with people in the room is that you are all involved in research or policy, and are potential users of the site.

❖ Moderator's role is to raise issues for discussion, watch for time, and make sure everyone has a chance to speak.

❖ Ask participants to introduce themselves by their first name and give a brief description of who they are and where they work.

B. Part 1: Initial Discussion (10 minutes)

❖ How familiar are you with the Small Business Policy Branch within Industry Canada? How did you become familiar/what relationship do you have with them?

❖ How familiar are you with Strategis?

❖ And how familiar were/are you with the Research and Policy website? Who has visited the website prior to coming to today's session? What were/are your first impressions?

❖ This web site is designed to encourage small business researchers and policy analysts across Canada to share information on small business research and policy. The web site includes an extensive database of research literature on the subject of small business and entrepreneurship, recent research reports on small business financing, small business statistics, a discussion forum, and lists of researchers and policy development offices across Canada.

❖ What do you think of the idea of the website? Is it helpful? Does it complement what else is out there? Is anything else out there that is comparable?

C. Part 2: Reality-Based Site Visitation (20 minutes)

[The session will begin with the browser on each computer opened on Strategis to see how easy the Small Business website is to locate. The "home page" button will be defaulted to the Small Business Research and Policy website.]

❖ I would like everybody to turn on their screen. The Small Business Research and Policy website is located on the Strategis Website. I'm going to let you locate the SBRP website yourself. [Wait to see then ask reactions.]

❖ Now let's go to the SBRP website. I want you to spend 10 minutes visiting the site thinking about your needs and interests. If you get lost at any time, just click on the "home" button. The main page of the Small Business Research and Policy website we are examining today has been set as the default home page.

❖ While you are doing this, every so often I will ask one of you to "think aloud", describing what you are thinking about as you are doing this.

[During this part, the moderator will walk the room and pose the odd question.]

❖ Everybody has now had a chance to go over the site in more detail. I now want to ask more specific questions about a number aspects of the site.

❖ The site's overall navigability and accessibility of the site (e.g., intuitiveness)

  » Is the site easy to use?

  » Does the layout make sense?

  » Are the links easy to find? Where you would expect to find them?

  » Is it easier or harder to navigate than other websites that you visit? Why?

- ❖ The overall look and feel of the site (e.g., attractiveness, display of information);
    - » Overall reaction to the design of the SBRP web site?
    - » Do you think the website has been professionally designed? Would you say it is better or worse or about the same as other government websites?

- ❖ The lay out of information (e.g., organization of information);
    - » In your view, is the information on the website organized in such a way that it is easy to find?
    - » Are the subheadings easy to understand? Did you know what to expect by clicking on the different subheadings?

- ❖ Satisfaction with browsing/searching capabilities (e.g., number of search results, quality/usefulness of search engine);
    - » Did you find what you were looking for?
    - » How did you find the number of clicks it took to get to some of the information? Too many, what you would expect?
    - » Was the search engine of the SME Research Database effective (i.e., did you find what you were looking for)?

- ❖ Satisfaction with information obtained (usefulness, relevance, overall quality, terminology, amount of information);
    - » How useful is the information?
    - » Is it relevant?
    - » What about the quality?
    - » What about the terminology? Easy too understand? Too much jargon?

- ❖ Information gaps and omissions;
    - » Is there any information that you think is missing?

D. Future Directions & Other Issues (25 minutes)

❖ I would like to focus more on the content, and what the site is all about.

Research Section

❖ What do you think of the SME Research Database? Is it useful? Why/Why not? How could you make it more useful? Does it provide something that is currently not out there? Would you like to be able to link directly to an author?

❖ What about the other sections — SME Financing Data Initiative, Canada Small Business Financing Act, and General Research Reports. Are they useful?

❖ What about the "Related Links"? Is this the right list of links? What other links should be included?

Policy Section

❖ Are the contacts/offices useful?

❖ Plans and other policy documents? Do you find it useful to have these documents available?

❖ What other policy documents would you like to see here?

Statistics

❖ Are the Frequently Asked Questions clear? Are the answers clear? Are they useful? What would you differently?

❖ What other questions would you like to see answered?

❖ Would you like to be able to obtain more detailed data on-line?

❖ Detailed results from major surveys on SB Financing are about to become available. Would you like to be able to obtain the data online?

❖ Do you currently receive an electronic notification when the latest version the Small Business Quarterly is available online? Would you want to? How would you like to register for such a notification: by sending email or by registering online directly?

Research and Policy Network

❖ Is the list of researchers and policy analysts useful? Is there anything else out there that is comparable?

❖ How would you improve this section?

❖ What about the Calendar of Events? Is it useful? How do you suggest this feature be developed and maintained?

❖ I'm going to have everybody look at the Discussion Forum [Have everybody log in]. What do you think about the Discussion Forum? What about participation in an organized discussion forum using the tool on the site? Would you? Why/why not? Do you have any concerns? What are they?

E. Usage & Other Issues (15 minutes)

The final part of the focus group will be devoted to obtaining participants' views on the study issues that have not been raised in the earlier phases of the discussions. These questions would include the following:

Expected Usage

❖ You have had a good chance to work through the website now. Will you use this web site again in the near future? Why/why not? Would you recommend it to others?

❖ Would you submit a research abstract using the on-line registration tool? Why/why not?

❖ How can we best market this site?

Email Notification

❖ For those who think they will use it in the future, would you like to receive an automatic e-mail message when there are significant updates to the site?

❖ If you wish to be included on the list of researchers and policy analysts in the small business community, would you prefer that your information be provided in both official languages, or only in your working language?

Future Directions

❖ How, if at all, would you suggest the information on the R&P website be organized differently so it is more suitable to researchers and policy analysts?

❖ The Research and Policy website is relatively new. Over the next few years, the Department will continue to refine and improve the website. Should it stay largely an information site or should there be more emphasis on more "active" applications (e.g., facilitation/discussion forum).

Ratings/Suggestions (15 minutes)

Participants will be handed the final handout. The handout will ask participants to quantify their perceptions on a number of aspects of the site, as well as asking about the strongest and weakest aspects of the site, and what three things need to be done to make the site more useful to them.

THANK YOU VERY MUCH FOR YOUR PARTICIPATION

Some of the Industry Canada people involved in the development of the site are observers behind the mirror. They'd be happy to continue the discussion with any participants if you can spare the time.