

**QUALITATIVE RESEARCH TO EVALUATE
THE INFORMATION ARCHITECTURE OF
THE CRA WEB SITE
Prepared for: CANADA REVENUE AGENCY**

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1.0 EXECUTIVE SUMMARY

1.1 INTRODUCTION

The primary objective of this research was to gather information on users' experiences with the CRA Web site and their suggestions for ways to improve the Web site. Particular attention was given to ease of navigation, effectiveness of the search function, clarity of the labeling and the organization of the web pages.

The design called for 48 one-on-one interviews to be conducted however, time permitted the completion of 3 additional interviews in Montreal, for a total of 51. The interviews were conducted between June 11th and July 4th 2007. In each of Toronto and Montreal, half the interviews were with Individuals (including Wage Earners, Seniors, Students and Self-Employed persons who did not have a Business Number (BN)) and half were with Self-Employed/Sole Proprietors who had a BN, and Business people who work for or with small/medium-sized businesses (including Owners/Managers, Employees who handle the tax affairs for their employer and Tax Professionals who have small to medium-sized business clients.) All were screened to have used the CRA Web site since January 2007, and all were screened to use the Internet for more than just email. Individuals were also screened to do their own tax return on their own or with minimal help. Business participants were screened to ensure they have direct involvement with the tax affairs of the business.

This research was qualitative in nature, and therefore does not reference any quantitative findings. However, in order to give some indication of the magnitude of the issues which arose, the report uses terms such as 'a few participants', 'some' or 'a number', 'many' or 'most'.

1.2 INDIVIDUALS

There were a number of key themes that emerged from the Individuals included in this research, including:

- Individuals who are using the CRA Web site are typically there because they have an immediate need for information, usually a question about their income tax or benefits programs. They go to the Web site because they want to be able to find information quickly, and they do not want to have to phone the CRA.
- There are a number of behaviour patterns which could influence the eventual redesign of the site, including the fact that many Individuals, particularly younger participants, do not like to read, but prefer to skim. They don't want to scroll, but if scrolling is required, it should be clear visually that scrolling is necessary. If following the links requires too many clicks, they will resort to *Search*. If *Search* does not work, they will phone, and they don't want to phone.
- Most like the fact that the *Home* page clearly indicates pages for *Individuals* and pages for *Business*. It allows Individuals to focus on a specific area of the *Home* page, and virtually ignore the rest.

- Relatively few recognized that the words ‘*Individuals*’ and ‘*Business*’ were links. Most thought they were simply column headings, and therefore never saw the *Individuals* page. This means they missed seeing links such as *Seniors*, *Students*, *Direct deposit* and *Life events*, all of which could have helped them complete the tasks.
- Most tended to ignore the left menu on the *Home* page (and many subsequent pages), which meant they missed seeing some key links such as *Resolving disputes* and *Charities*, both of which could have helped them complete some tasks.
- Once past the *Home* page, *Individuals* were not sure of the organization of the site, but intuitively seemed to want to navigate by topic, rather than audience type.
- They found the site somewhat difficult to navigate if the topic was not mentioned on the *Home* page, or the second page. They did not like having to second-guess how the CRA has organized information. Most of the navigation problems encountered during the tasks were the result of the participants not finding a link they expected to see, or not understanding how the CRA had organized the information.
- There are some inconsistencies between the name of the link and the heading on the page that the link leads to. One example is the link *Employment status for EI and CPP* which leads to a page entitled *Canada Pension Plan (CPP) and Employment Insurance (EI) Rulings*. In some cases, participants felt misled or confused by the name of the link.
- When navigating, most *Individuals* instinctively used the *Back* button on the Browser menu, or the *Home* button on the institutional menu (commonly referred to as the ‘top menu’). Many did not even see the *Return to...* buttons that appeared on some pages.
- The *Search* box on the *Home* page was initially missed by many who felt it was overshadowed by the gray bar above it. Most assumed that the *Search* box and the *Search* link in the top menu bar were two entry points into the same thing.
- Most *Individuals* tried to use *Search* when they were frustrated with their inability to navigate using links. Many criticized the *Search* function for yielding too many results, as virtually no one is prepared to look at more than 10 or 15 results.
- Many criticized the *Search* function for yielding irrelevant results, although this was partially attributable to the words and phrases they used in *Search*. One of the key frustrations with using *Search* was deciding which keywords to use.
- Some found the *A to Z Index*, or the alphabetical indices helpful, particularly if the task was relatively simple, and leant itself to a one word keyword (e.g. ‘tips’).
- The language used on the site was generally considered understandable, however, it seemed that *Individuals* tended to skip over or ignore words they did not understand. There are a number of links on the *Home* page that were considered misleading or confusing. Some of these include *Taxpayer alert*, *Employment status for EI and CPP*, *Making Payments*, *Taxpayers’ Ombudsman* and *SR & ED*.

1.3 BUSINESS

There were a number of key themes that emerged among Business participants, including:

- Business participants who are using the CRA Web site are typically there because they have an immediate need for information related to their business or their client's business. They are typically at work when they go to the site, and do not want to spend a lot of time on the site. They go to the site to download forms, or find answers to questions about the GST/HST, payroll, or corporation taxes. They go to the Web site because they want to be able to find information quickly, and they do not want to have to phone the CRA.
- It should be noted that some of the factors that contributed to the Business participants' ability to complete the tasks were related to the way they approach a Web site, rather than a problem with the CRA site. They are not interested in reading a lot of text, and will scan the page rather than read it thoroughly. On pages that are in paragraph form, this means they can miss critical information. This means it is important to make effective use of bullet points.
- Similarly, many do not like to scroll, which means they can miss information that is closer to the bottom of the page. If scrolling on a page is required, it should be very clear that there is more information 'below the fold' (i.e. below what is initially visible on the screen).
- Many Business participants, particularly younger ones, tend to go right to the *Search* function on the site. Several said they prefer to use Google for their searches, rather than the site-specific Search tool. They prefer not to use the links because they do not want to have to click through more than 3 or 4 links to find the information. Given the size and complexity of the CRA site, they tend to think that navigating by links would take considerably more than 3 or 4 clicks. In this respect, it is very important to have an efficient Search function on the site.
- When using *Search*, some instinctively went to the link because they are used to finding a *Search* link in the top menu bar. Others used the link because they did not see the *Search* box on the *Home* page. However, most ultimately said they saw both the link and the box, and most assumed they were two entry points into the same thing.
- The key criticism of the *Search* function was the number of results. Most said they expected the first 10 or 15 results to be the most relevant, and if they did not find what they wanted within those, they would not look further within that set of results. Rather, they would refine their search using different keywords.
- In this respect, one of the key frustrations with using *Search* was deciding which keywords to use. In some cases, participants felt they had to second-guess the words that the CRA would use in order to be successful. Many also criticized the *Search* function for yielding results that did not seem relevant to the issue being addressed.
- Most like the fact that the *Home* page clearly indicates pages for *Individuals* and pages for *Business*. It allows Business participants to focus on issues relevant to them in their professional capacity.

- Only a few Business participants understood that the words '*Individuals*' and '*Business*' were links. The rest thought they were column headings, with the result that they did not see the *Business* page until shown it by the moderator. This was an issue because it meant they did not see the scope of topics offered for the business community, nor did they see some of the features offered on the site, such as the *Business topics alphabetically* feature on the *Business* page.
- Because they focused on the middle of the *Home* page, many Business participants ignored the left menu. Again, this meant they missed seeing some key links such as *Resolving disputes* and *Charities*, both of which could have helped them complete some tasks. It also meant that Tax Professionals criticized the site for not having a link for them, because they did not see the *Tax Professionals* link.
- Once past the *Home* page, Business participants were not sure of the organization of the site, as some pages are organized by topic, while others are organized by type of business. Intuitively, many seemed to want to navigate by topic.
- If the topic was not mentioned on the *Home* page, or the second page, or the participants did not see a link they expected to find, many Business participants were quickly frustrated with navigating by links. They felt they had to guess at how the CRA has organized information; it was not always intuitive.
- Business participants noted some inconsistencies between the name of the link and the heading on the page that the link leads to. One example is the link *Business registration* which leads to a page entitled *Business Number (BN) registration*. There was confusion among some Business participants as to the relationship between 'registering a business' and 'opening an account'.
- Most Business participants used the *Back* button on the Browser menu when they were navigating using the links. To return to the *Home* page, they either clicked the *Back* button several times, or used the *Home* button on the top menu. Many did not even see the *Return to...* buttons that appeared on some pages.
- Some found the *A to Z Index*, or the alphabetical indices helpful, particularly if the task was relatively simple, and leant itself to a one word keyword (e.g. 'audit').
- The language used on the site was generally considered understandable. However, there were clearly words and phrases that some Business participants did not understand, such as 'appeal' vs. 'contest', and 'prescribed interest rates'.
- There are a number of links on the *Home* page that were considered misleading or confusing, including *Represent a client*, *E-services*, and *SR & ED*.

1.4 OVERALL CONCLUSIONS

User Behaviour Impacts Reaction To The Site

In moving towards a redesign of the CRA Web site it will be important to keep in mind some fundamental aspects of user behaviour:

- Users come to the Web site to find information quickly; they do not want to spend a lot of time on the site. If they don't find what they want fairly quickly, many will give up and phone.
- Many users do not want to read a lot of text. They prefer to skim the pages, looking for specific words or phrases that will tell them they are on the right path.
- Many users do not scroll down the page, meaning they can miss important information that is 'below the fold'.
- Individuals and some Business participants do not visit the site often enough to become familiar with it. This means the site needs to be designed in such a way that first-time users can navigate easily.
- Those who visit the CRA Web site more frequently (i.e. Tax Professionals, and, to some extent, Employees of small and medium-sized businesses) do seem to learn their way around the site, but this also means they have higher expectations for the way the information is organized.

Organization Of The Site Is Not Always Clear

The CRA Web site is acknowledged as big, which means users need it to be clearly organized:

- They want to narrow the focus as quickly as possible, and therefore appreciate that the *Home* page sets Individuals and Business apart.
- Most do not recognize that the words *Individuals* and *Business* are links, and therefore miss seeing useful links.
- Many dismiss the left menu as including links leading to general information.
- Many believe the top menu will include the standard links found on most sites.
- Most are not sure how the site is organized once past the over-arching division between Individuals and Business.

Navigation By Links Is Not Always Easy

While some of the more straightforward tasks could be accomplished using the links, other tasks were more challenging:

- Most problems resulted from participants not finding a link they thought they should see, or not understanding how the CRA had organized the site.
- Many complained that too many clicks are required to find information.
- Most used the *Back* button in the browser, or the *Home* link when navigating.

Navigation By Search Had Mixed Results

Participants had mixed results using *Search*:

- Some participants used *Search* immediately, and did not even attempt to use the links for navigation.
- Some used the *Search* link, while others used the box. The *Search* box was not immediately seen by some. Most believed the link and the box were simply two entry points to the same thing.
- Finding the right keywords to search was the major problem, as participants felt they had to second-guess the CRA's use of language.
- *Search* did not seem to allow synonyms (e.g. *car* vs. *vehicle* vs. *automobile* or *appeal* vs. *contest*).
- The results pages typically have too many results, with many that seem irrelevant to the search.

The Language Used On The Site Is Reasonably Well Received

- Many describe the language used as fairly easy to understand.
- There is some jargon that not everyone understands (e.g. *arrear*s, *ombudsman*, *capital gains*, *deemed resident*, etc.).
- There are some links that are misleading or confusing (e.g. *Taxpayer alert*, *Employment status for EI and CPP*, *SR&ED*, *E-services*, etc.).

1.5 RECOMMENDATIONS

Based on the results of this research and the interpretation of the moderators, the Canada Revenue Agency could consider the following:

- Revising the *Home* page as follows (see Suggested Version on Page 75 of the Detailed Findings of the full report):
 - showing only four key columns – *Individuals*, *Business* and *Quick Links* in the middle, and a left menu that is reduced in size.
 - finding a way to make it clear to users that the words *Individuals* and *Business* on the *Home* page are links and not just headings.
 - making the *Individuals* column more comprehensive by adding to the list of topics, groups of people, and activities included.
 - making the *Business* column more comprehensive by adding to the list of topics, people and types of businesses and sectors.
 - putting the left menu in a logical order – perhaps alphabetical.
 - moving the *Search* box on the *Home* page to a more visible location.
- Making pages with a lot of text on them easier to read by reducing the number of paragraphs and making more use of bullet points, and sub-headings on the pages.
- Clarifying some of the more confusing links such as *Taxpayer Alert*, *Employment status for EI and CPP* and *SR & ED*.
- Ensuring that the name of the link is consistent with the title of the page to which it leads.
- Organizing the links by topic more consistently.
- Allowing a variety of synonyms to be used in *Search*.