Using WebEx for Usability Testing: Considerations for Establishment Surveys

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March 20, 2014
FedCASIC

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Outline

- Background
- The Problem
- WebEx
- How does WebEx compare to in-person interviews?
- Lessons learned
- Future research

Background

- Testing for the Quarterly Summary of State and Local Government Tax Revenue (Q-Tax)
  - Usability testing
  - Goal: 6 interviews
  - State and local government respondents
  - ~45 minutes

The Problem

- Limited resources
  - Time
  - Money
- Inability to travel
- Exhausted the target population in local area

Our solution: WebEx

- Allows for remote testing (no need to travel)
- Available to U.S. Census Bureau staff
- Not too difficult to use
- Previously used for usability testing (Stettler, 2013)
- Ability to view respondent's screen

Overview of WebEx

- Developed as a web conferencing tool
- Participants “attend” the meeting online
- Participants can view the names of all parties in attendance
- The meeting host can record the session at any time

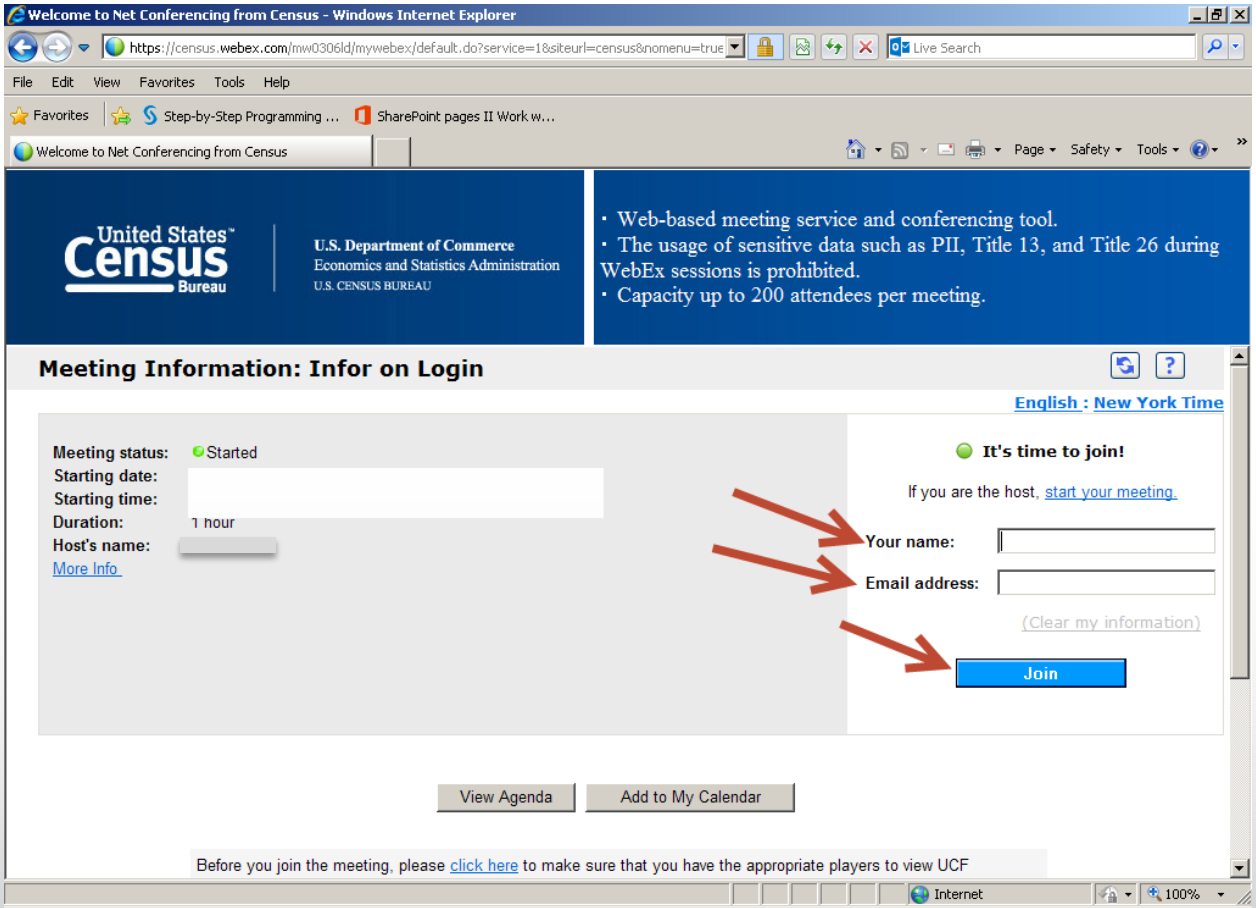
The Q-Tax project

- Recruited respondents
- Confirmation via e-mail sent
- Consent form emailed to respondent
- Instructions to log-in to the WebEx session

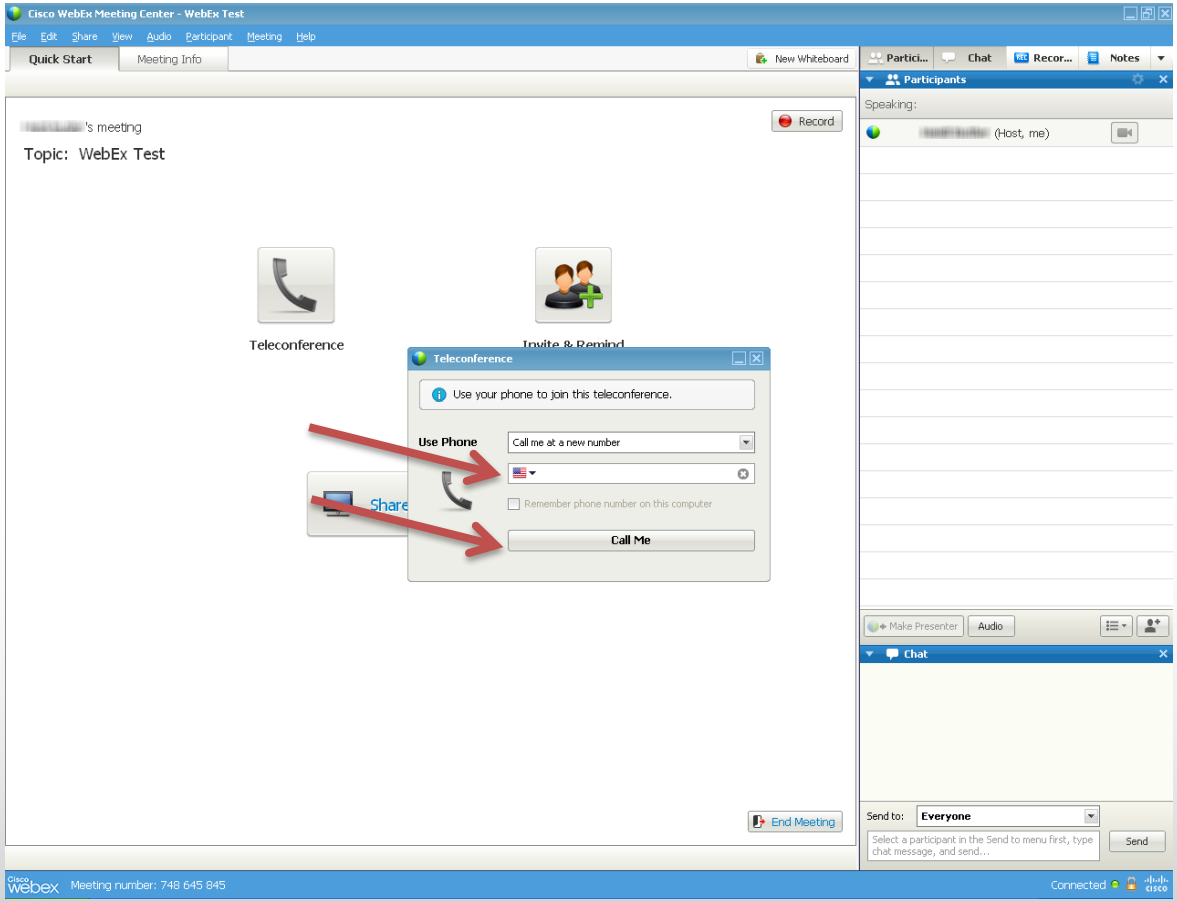
Before beginning testing

- Introductions and explanation of the meeting
- Remind respondent to close any browser windows
- Begin recording
- Have respondent share their screen
- Send usability testing link
- Share User ID and PW verbally

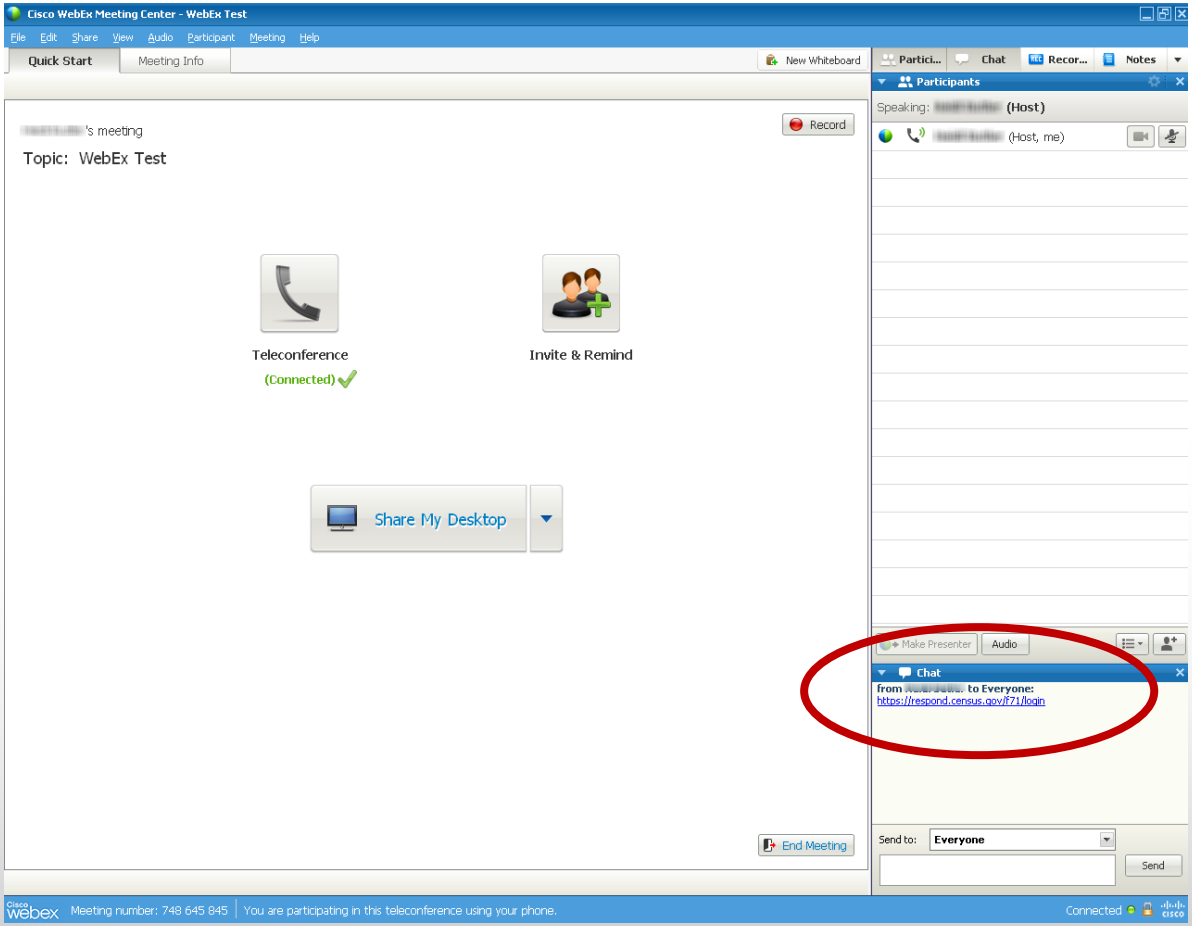
Sample screens



Sample screens



Sample screens



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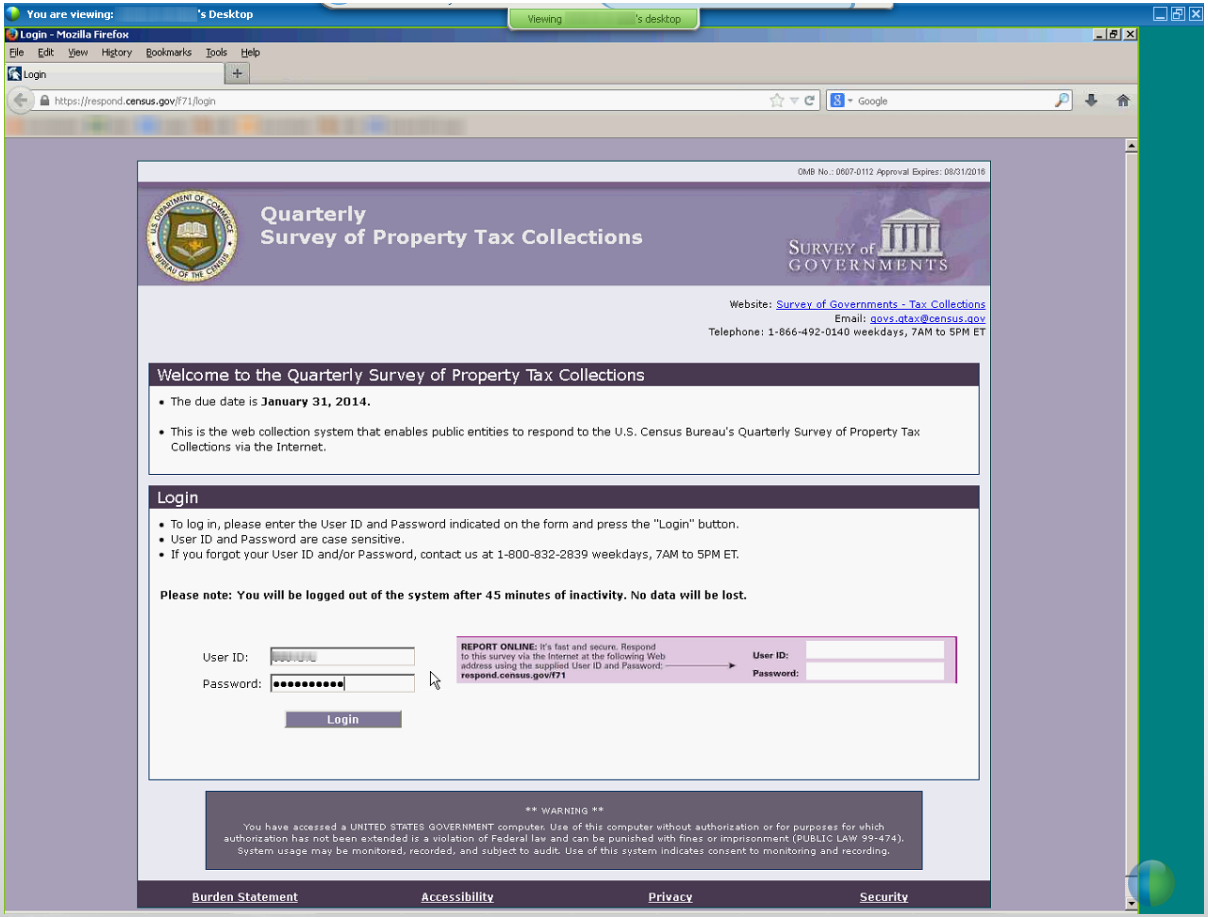

How does WebEx compare to in-person usability interviews?

WebEx vs. in-person interviews

Overall

- See how respondents interact with the web instrument
- Provided information on the layout and navigation
- Identified “show stoppers”
- Identified issues for future data collection efforts

WebEx vs. in-person interviews

Interacting with respondents

- Phone and email contact
- Confirmation email and consent form
- Additional email with link and instructions

WebEx vs. in-person interviews

Issues with recruiting

- For usability testing in general
  - Availability of respondents
  - Time of the year
  - Willingness
  - Time commitment (45 minutes)

- For usability testing with WebEx
  - More concern about researcher being an actual US Census Bureau employee
  - Concern about being “observed” from a remote location

WebEx vs. in-person interviews

Technical issues

- Web browser compatibility
- IT security
- Direct line needed for conferencing
- Lack of respondent familiarity with WebEx
- Not intended for tablet or mobile devices

Lessons learned

- Advantages of using WebEx
  - Saves time and travel costs
  - A better view of the respondent's screen
  - Records audio and video of respondent's screen
  - Could recruit replacement cases faster
  - Respondents liked it

Lessons learned - continued

- Disadvantages of using WebEx
  - Technical issues
  - Recruitment of additional cases
  - Lack of nonverbal cues
  - Missing other details
  - More work for respondent
  - Steep learning curve for the interviewer
  - Recording files are larger
  - May be more difficult for testing paper materials

Future research

- Expand WebEx with business and household surveys
- Consider behavior coding of recorded sessions
- Explore other remote testing options

Thanks!

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