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# OECD's approach to understanding user needs

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**Introduction**

1. The OECD's mission – Better Policies for Better Lives – promotes policies that will improve the economic and social wellbeing of people around the world. It provides a unique forum in which governments work together to share experiences on what drives economic, social and environmental change, seeking solutions to common problems. The OECD Public Affairs and Communications Directorate support the implementation of the Secretary General's strategic orientations by orchestrating the Organisation's external communications. We look at the whole spectrum of OECD work, how it relates to the global public agenda, and ensure key OECD policies and research are communicated to key stakeholders, citizens and the media.

2. This can only be achieved if we communicate statistics in ways that are easy to understand to both experts and non-experts users.  Recently, the OECD carried out several initiatives to learn more about our users' needs. This paper describes the approach OECD used for researching user needs, the results of the research, as well as, the challenges identified and new initiatives to better meet users' needs.

**OECD's approach to audience analysis**

3. In 2009, OECD worked with Gerry McGovern, the founder and CEO of Customer Carewords. He is a widely regarded worldwide authority on increasing web satisfaction. With his guidance, we surveyed our website users to find out more about their needs. The survey questions included 'what do you want to do on the website?' with a long list of options from which responders were asked to make a selection. This survey also provided insight to the profile of users that are already coming to our website and the top tasks our users want to do on the website.

4. Next, Gerry McGovern and OECD conducted several website usability tests with representatives from each user profile to see if users were successful at completing the top 10 tasks within an expected timeframe. Following this, OECD conducted a second round of user tests using the approach to usability testing described in Steve Krug's book, 'Rocket Surgery Made Easy'. All of the usability tests demonstrated that users had difficulty completing a number of the top tasks on our website.

5. In 2011, the Secretariat launched the review of the publishing operation and arranged information sessions on current publishing arrangements for delegations. The Secretariat also commissioned a review

of the Organisation's publishing arrangements from external consultants. The consultants carried out interviews with stakeholders within and outside the Organisation, external users and media. They also benchmarked OECD against other IGOs and comparable publishers.

6. The study found that OECD offers a wealth of content online. Significant improvements in dissemination have been made over the past few years. However, the consultants found that there remains a clear 'accessibility gap'. One manifestation of this problem is that key audiences still find it difficult to locate and access the OECD's messages and content. The main "accessibility" problem, however, is the way that **statistical data** is presented, particularly for non-specialists. Concerning **publications**, consultants also identified a key "accessibility gap", especially with flagship titles such as the Outlooks, which are intended for a broad audience. An over-use of jargon, in-house codes and technical language blurs the main messages, and makes the key conclusions and recommendations difficult to access for a non-specialist audience.

7. Finally, workshops were held with stakeholders and in-depth telephone interviews were conducted to focus on the particular needs of data users. These user requirements were compiled into 'data' user personas and a list of user requirements.
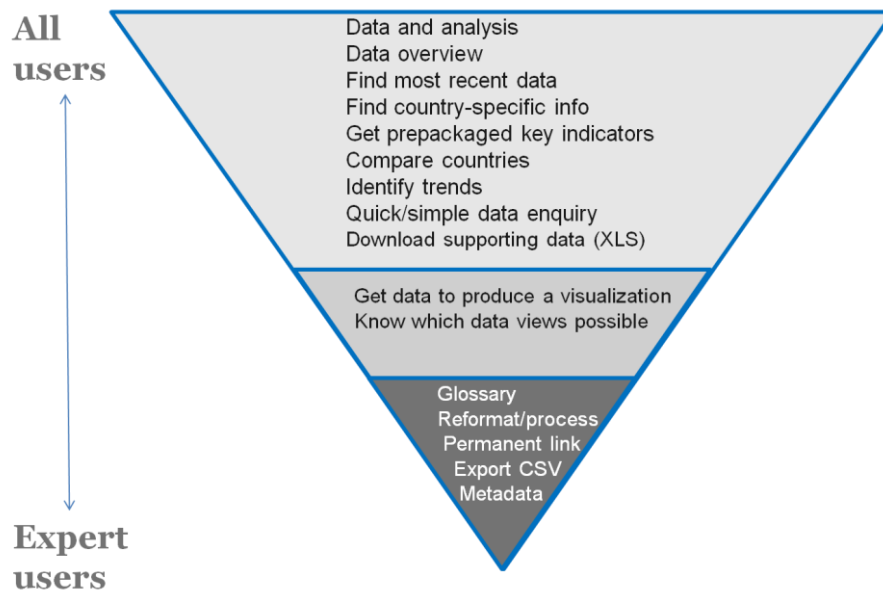
**What do users want?**

8. The McGovern study found that the top 10 tasks identified by all website users satisfied 50% of their needs. The top 20 tasks met 75% of user needs. There is a long tail of less important tasks. The less important tasks for users sometimes are strategic for the Organisation's communication with specific user groups.

| | Tasks |
|---|---|
| 1 | Country surveys / reviews / reports |
| 2 | Compare country statistical data |
| 3 | Statistics on one particular topic |
| 4 | Browse a publication online for free |
| 5 | Working papers |
| 6 | Publication by topic |
| 7 | Basic facts, summaries and overviews |
| 8 | Statistics on one particular country |
| 9 | Statistical forecasts / projections |
| 10 | Access to raw data |
| 11 | International guidelines and standards (corporate governance, tax havens, etc.) |
| 12 | Statistical sources and methods |
| 13 | What's new (hot topics, recent publications, events) |
| 14 | OECD policy advice by topic, country |
| 15 | OECD Annual Report |
| 16 | Publication by country |
| 17 | Best practice in policy implementation |
| 18 | Publication by title |
| 19 | Simple, easy-to-understand tables and graphs |
| 20 | News releases |

9. OECD data users have a range of profiles and tasks to carry out when they come to our website. The profiles include policy advisor, business analyst, researcher/statistician, university librarian, journalist, NGO/Citizen with a cause, and undergraduate students. These profiles were developed into user personas to build a better understanding of our users and to convey user needs inside the Organisation.

10. There are some top data tasks that meet the needs of all data users and other tasks only needed by a smaller population of expert users:

All users

Data and analysis
Data overview
Find most recent data
Find country-specific info
Get prepackaged key indicators
Compare countries
Identify trends
Quick/simple data enquiry
Download supporting data (XLS)

Get data to produce a visualization
Know which data views possible

Glossary
Reformat/process
Permanent link
Export CSV
Metadata

Expert users

11. More detailed user needs are presented below for each user profile:

**Policy Advisor**
Typical Task: Preparing for a conference
Data needs:
- For a topic, get an overview, key recommendations and supporting charts/tables
- Have sight of interim data / notified of new data
- No time for advanced features

**Business Analyst**
Typical task: Client business advice
Data needs:
- Data to explain the current situation in a sector / location
- Time series data to show trends and to enable forecasts
- Data that is not easily accessible elsewhere

**Researcher/Statistician**
Typical task: Data crunching for a report
Data needs:
- Download entire or multiple datasets in one click
- Machine-friendly formats / automated exports
- Clear metadata

**NGO / Citizen with a cause**
Typical task: Financial trends report
Data needs:
- Relate factual data to a particular cause
- Easily find main indicators
- Notified of new data and reports in interest areas

- No time to do her own research

**Undergraduate Student**
Typical task: Digging into the data for an essay or a paper
Data needs:
- Get reassurance that he is looking at the main indicators
- Needs a chart with description for an essay or paper
- Consult summaries and abstracts of reports for context
- Video tutorials

**Journalist**:
Typical task: Creating a topical graphic
Data needs:
- Timely data
- The main indicators made clear
- OECD view or opinion
- Receive alerts for data in area of interest
- Preferably, to use their own house style graphs on their main news site
- Some news channels would not necessarily have resources to invest in creating their own house graphs so they are also interested in embedding very simple interactive graphs directly in their website or blogs.

**University librarian:**
Typical task: Assisting advanced data query
Data needs:
- Download all related data for a topic
- Locate reports as starting points for less advanced students
- Methodology
- Know about all new data

12. Users want to access both statistics and analytical content. Users want more guidance to find key indicator data and overview information. They want more guidance to lead them into a high level overview and into the more detailed information when appropriate. They are not necessary looking for whizzy data visualisations – these are considered a 'nice to have'.

13. As demand is increasing for 'open' data and increased transparency, we need to meet the needs of a new category of users, software developers, which want to develop a program to create machine to machine access to our data via Application Programming Interfaces (APIs). The professional data redistributors also want faster access to data and are willing to develop programs to allow them to pull bulk data in real-time via an API.

14. Users are increasingly accessing data via tablets and mobile devices. To meet this need our website must be much more responsive and adapt to the layout of the device.

15. It is clear that we need to provide different services for different types of users. Expert users are much more at ease using complicated database tools and the time pressed and non-experts are less-forgiving and are used to consumer tools which require simple interaction and plain language 'accessible' content.

**Challenges**

16. The internet is the main communication channel of the organisation. It is difficult to understand the user on the internet because they are invisible to us and we know very little about their level of satisfaction. This is particularly true for the general user who is likely to be unwilling to spend time filling out a user survey. The survey is often not a great way to measure user satisfaction because users will often report they are very satisfied even when they could not find what they were looking for. There is a phenomenon where some users are reluctant to criticize and they consider it might be their own fault they didn't find what they needed. Often we use visitor counts or page visits for reporting and we assume that if this is increasing we must be satisfying the needs of users. If a customer is on the internet and they are hitting the wrong section of the website due to a poorly labelled button, we are slow to react – we cannot see the problem and our visits are increasing so we tend to ignore it. However, if we are not satisfying our 'core users' then we can hardly reach an even wider audience successfully. We need to establish a better way of measuring online success. One way is to use the "task completion ratio", which is the percentage of top tasks the users complete successfully during usability tests. Another is to measure the "task performance indicator", which is the time the usability testers took to complete the top tasks compared to the minimum time it should take.

17. Before the internet, statistics were consumed by a fairly niche audience of media, policy advisors, think tanks and academics. The media was instrumental for us to reach the general audience. Today, the challenge for statisticians is to adapt their writing in ways that reach directly to a broader audience. This does not mean we have to dumb down all of the text but rather add a layer on top of the specialist content with plain language and key indicators with summary text.

18. In addition, more citizens have direct access to statistics and are able to contribute to the political debate. We need to meet the needs and expectations of the different target audiences taking account of their evolution and role in the policy making process.

19. **Readability and accessibility of content** refers to clear, presentation, a clear structure and hierarchy of information of both data and non-data content. It also refers to whether the content is presented in an appropriate way for the target audience. Is analysis written clearly and concisely? Are figures easy to understand with a clear story? In analytical content, are the figures and text adapted to make a coherent, readable and accessible whole? Is the choice of language clear and jargon-free in both analysis and text accompanying data content (e.g. figure titles and legends)?

20. To define ways to measure readability of content, OECD commissioned a benchmarking study to determine what others are doing. The results were inconclusive – IGOs do not have guidance on readability, and while some countries have commitments to plain language and readability, monitoring measures are not defined. Existing automatic "readability tests" tend to focus on individual elements, such as words of few syllables, which are unsatisfactory as short nonsense scores higher than clear sentences with longer words which are perfectly understandable. A suitable measure for the OECD may have to be developed, linked to audience feedback, usability testing or dissemination among target audiences, for example.

**Looking forward**

21. As a result of these studies, OECD Council Members mandated a project to make data **Accessible**, "whereby users are able easily to *find, understand and use* the content they seek". As part of this initiative, several areas of work are being addressed over the next biennium:

- To build a user friendly statistical portal, a central gateway to access all OECD data and publications. This portal will present a first layer of dynamic key indicators, such as the Factbook and At a Glance type publications with the indicator description and comparability information. This will be presented with links to related overviews and publications to provide context for

users. The portal will also provide the links to further information and databases for those who want to research in more detail. For specialists, a direct link will be provided to databases and build your own query tools.

- Launch of a search project to improve the overall discoverability of OECD data and content. Work needs to be done to improve identification of key words within each dataset, so as to enhance the ability of search engines like Google to index OECD data. The search project will work across all OECD content and will focus on the top search keywords.

- Creation of an API project to make OECD data machine to machine readable. A forum will be put in place to carry out discussions with the developer API user community. A first small hack-a-thon has been carried out to test potential API formats.

- Work with other organizations and Creative Commons (CC) to adapt licenses such that they can be used by IGOs. OECD will update the terms and conditions for licensing and re-use of data so that users can easily understand the terms of use.

- Creation of a set of **definitions**, **rules** and **recommendations** on content accessibility– to complement the Publishing Policy. To put in place a **governance system** where definition of **roles, responsibilities and processes** in improving content accessibility are defined. Guidelines for accessibility must be more strictly adhered to, particularly for the key indicators and flagship publications targeted at a wide audience.

- To put in place a communication strategy to make OECD employees and stakeholders aware of the needs of users and the current gaps in OECD websites.

- In 2013, a detailed analysis of users, such as business, librarians and academics, will be carried out using focus group discussions. The goal is to identify premium services which would help these groups more effectively use OECD data in their work.

**Conclusion**

22. We believe we have used several excellent methods to understand user needs. This work is essential to ensure our relevance and impact in a world of increasing market competition, notably alternative and non-official data sources. The continuous change in users' needs must be recognized and we must repeatedly collect information about their needs to ensure that we are adapting appropriately.

23. Communicating feedback to internal employees and stakeholders via user personas is an effective way to sensitize the Organisation to users' needs. User personas provide a way to make the website and development teams focus on the users' goals and needs throughout the web site design process. This ensures that the website is user-centric and task focused.

24. Users are not looking for data in a silo. The vision from the user is 'Let me easily access the OECD *statistical data and analysis*. Let me *find, understand* **and** *use* the data I need." This means that any data portal must be broader than data alone and throughout our website we must help users find a combination of both data and analysis.

25. The initiatives launched following this user analysis will drive significant organisational change. A strong governance and centralized management and editorial control in publishing will be essential in order to deliver on our commitment to our Council Members and to successfully reach our target audiences, thereby increasing dissemination and impact.