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How to cite:

Stiles, Keren (2017). UX research with distance learners. In: Priestner, Andy ed. User Experience in Libraries Yearbook 2017: stories, techniques, insights. CreateSpace Independent Publishing Platform, pp. 127–131.

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Version: Version of Record

Link(s) to article on publisher's website:

<http://uxlib.org/uxlibs-the-books/>

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UX research with distance learners

Keren Stiles @mirya

The Open University, UK

The Open University is the largest academic institution in the UK in terms of student numbers. In the 2014/15 academic year the OU had more than 170,000 students of whom over 8,000 were overseas. The Open University's students are located all over the UK as well as in Western Europe and increasingly in other parts of the world. Figure 1 shows the locations of most of the participants of our most recent UX study. There are no undergraduates or masters students on campus, which is why it's important to us to be able to conduct as much of our UX research as possible remotely.

Over the last ten years the average age of our new students has dropped from 55 to around 29 because increasing numbers of school leavers have chosen to study with us. This has challenged the assumption that we knew what our students' needs and expectations were and has motivated us to do more to keep up-to-date with the requirements of our evolving student population.



Figure 1 Locations of UX study participants.

Background to the Open University Library Services UX work

In order to avoid restricting our research to those students who happen to live within easy travelling distance of our Milton Keynes campus, we conduct as much UX as possible remotely online.

Having established that we could successfully conduct usability interviews remotely, we've also started to adapt UX methodologies which were developed for understanding physical space to online environments and remote participants.

Our first UX study using ethnographic techniques was conducted in October 2016 to help us answer a specific question. We currently have a publicly available Library website where the content is student focused, as well as a separate Library intranet site detailing our metadata services and the support we provide for development of learning and teaching materials. At the time of the study we were also preparing to launch a separate website for library research support. The Library's senior team were concerned that our web estate was becoming too spread out and potentially difficult to manage, and wanted to know how merging the staff-facing content from the intranet site into the main library website was likely to impact on the student experience.

Love/break-up letters

We conducted focus groups using our online tutorial software, which our students are already familiar with from their online tutorials. This allowed all participants to be able to join in the conversation as they would in a face-to-face focus group, although they did have to virtually 'raise their hands' when they wanted to speak because there is a limit to the number of people who can activate their microphones simultaneously.

The love/break-up letters technique ensured that everyone was heard, and identified common ground among participants without topics being introduced by library staff or by a strong personality in the group. I did have some discussion topics prepared, just in case the letters didn't introduce topics of discussion. I didn't ever need to use these to move the conversation along.

At the start of each focus group session, I showed Smart Design's video of people reading break-up letters to help explain the activity¹, and then gave our participants 10 minutes to write their letters on paper I had asked them to have beside them as

¹ Available to view at <https://vimeo.com/smartdesign/breakupletter>.

part of the instructions for joining the online focus group. I then asked if anyone would be willing to read their letter out loud to the group. Once one or two people had volunteered, all participants became willing to read their letters aloud in all three of the focus groups. As people were reading their letters, myself and a colleague made notes of pain points or things I wanted to know more about, and these provided our topics for discussion for the remainder of the session.

When we sent participants their Amazon gift cards to thank them for participating, we also sent stamped addressed envelopes so that they could post their original letters back to us, which made transcribing them easier.

As is often the case, more participants wrote love letters than break-up letters, but even in the love letters I could identify library interactions that people had found difficult. By the time I had completed the focus groups I was confident that adding more content to the main Library Services website would lead to increased confusion for students, mostly because they already struggle with the volume of content on the site.

For this piece of research I conducted separate focus groups for students studying at different levels so that participants within each group were more likely to have had similar exposure to the online library.

Myself and my colleague David Jenkins, Research Support Librarian, ran a workshop for our library colleagues where we gave them a chance to try out love letters, directed storytelling and cognitive mapping. As a result, love/break-up letters have been used at the start of library training sessions for OU tutors to gauge how to pitch the session.

Jo Parker, Senior Library Services Manager (D&IL & DISC), has used 'love postcards' to assess staff attitudes to a digital skills assessment tool. As well as feeding her findings back to Jisc, she shared this idea with the rest of the pilot group for the Jisc Digital Capabilities Discovery Tool. Jisc are now recommending this approach.

Colleagues across the university who've seen us using love letters in the library are also adopting them to assess perceptions of their own products and services.

Touchstone tours

I followed up the focus groups with 17 interviews with individual undergraduate students, using the 'touchstone tours' technique. At the beginning of each interview I asked the participant to "Pretend I'm a fellow OU student who has told you that I've never used the library, and you've kindly offered to show me how you use it

in your studies.” This may not have been the best wording because in some cases I think I got a library induction rather than a view of how that student uses the library, but even so we learned a lot from the touchstone tours that we wouldn’t have learned from usability testing, where the tester often provides the scenarios.

I didn’t give the participants a particular url or web page to start from, I left it up to them to ‘go to the library’ by their usual preferred path, which allowed me to see the different routes they took to get to the online library. In one or two cases they actually went straight to content providers’ websites via their online study materials and didn’t go to the library website or discovery tool at all. 56% of the participants who did go to the library website performed a search in our discovery tool from the homepage without looking at anything else on the website. These observations highlighted that many library customers may never see any links to our help and support pages around good search techniques.

Some students gave very helpful tours for the inexperienced library user. Seeing the things they pointed out to such users has helped us understand what our introductory materials should cover. It also showed that many students value our discovery tool, but they tended to emphasise that inexperienced library users would need guidance or training when first starting out with library searches.

We noted that those students who did go to the library website focused their attention on the homepage and the section where we list our databases and recommend resources by subject. It was clear that when they did look at other sections of the website they were often only exploring them because they’d been asked to give a tour. Some students clicked around these other sections very quickly in a way that seemed to indicate those pages weren’t grabbing their attention or giving them the information they were looking for. As a result of this observation we are now doing some UX research to improve our website architecture and navigation.

Students told us that once they’ve located an ebook, article or other library resource that they were interested in, finding their way back to it another time is challenging.

I think it would be valuable to repeat this activity with other groups of customers, such as academic staff and research students, because their needs, processes and expectations will differ from those of undergraduates.

For interviews where we need to be able to see the participant’s screen we use remote support software (TeamViewer). Colleagues in other departments of the university have also used Skype, but I have reservations about potentially having to ask students to sign up for Skype if they don’t already have an account. We did try

Blackboard Collaborate for interviews, but found that if we needed the participant to share their screen there was too much lag so we missed a lot of what they were showing us.

Whenever I conduct interviews, I invite Library staff to observe (and to help me take notes). This way they see for themselves the value of UX observations and that the feedback they hear from students during enquiries is not fully representative of the broader student population.

UX at a distance works

My first foray into using ethnographic UX techniques remotely with distance learners produced very useful data. The administration involved in setting up the focus groups and interviews was probably not much more time consuming than doing the work with participants on campus. This has given me the confidence and enthusiasm to want to do more UX work with our distance learners, and to encourage my colleagues in the library and the wider university to do the same.

