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USER NEEDS AND INFORMATION MARKETING

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1.   User studies

In this paper, the single expression 'user studies' will be used,
rather than the more complex expression 'user needs and information
marketing'. By user studies we mean a body of studies concerned with
the needs of individuals or groups for information and their behaviour
in seeking and using information. User studies are commonly, but not
necessarily, concerned with the users (or use) of a particular
information service or facility, or with the place of a particular
service or facility in the range of information seeking or using
behaviour of individuals or groups.

The term user studies thus includes that part of marketing which may
be called market research, but the expression (as used in the United
Kingdom) does not include either 'promotion' of services, or guidance
or instruction in their use. (In the seminar, it will be possible to
give some consideration to the links between the two aspects).

2.   User studies in the curriculum

Why are user studies important?

It is taken as axiomatic that any library or information service
should aim, as far as possible, to meet the needs of its users or
potential users. Any service - library or other, public or commercial
- should do its best to identify the needs of the population that it
is trying to serve, and make its services responsive to those needs.

Responsiveness to needs is a constant, continuing imperative. If services are not developed in response to users' or potential users' needs, they must be developed on some other basis or bases. A number of such bases can be identified:

a.   Status quo
b.   Logic or common sense
c.   The needs of the system
d.   Technology
e.   Professional beliefs or theory
f.   Demand

Let us look at these more closely.

a.   Status quo

In a sense, we may be thinking of a service not developing at all, but simply remaining the same. It may be, however, that, even where a service is being developed, it is developed simply in accordance with conventional general library practice.

b.   Logic

Let us take a simple example. A university manager chooses how to deploy his staff time to keep the library open. He may have the choice of opening the library on Saturday or on Sunday. Extra payments for Sunday working may mean that the choice is between nine hours opening on Saturday or six hours on Sunday. Saturday is clearly better value for money, and, logically, preferable. In fact, it might very well not be preferable to the users.

c.   The needs of the system

"Logical" arguments may actually reflect the needs (or wants) of the system. In making the logical choice against Sunday working, the library manager may unconsciously be reflecting the staff's feeling that they do not wish to work on Sunday.

Other instances of the needs of the system (which may simply
reflect established practice) are easy to identify. Microfiche
catalogues replace card catalogues; journals are taken away for
binding at the very time they are most needed, etc.

d. Technology

Again, it is easy to imagine instances of services being
available, or being offered in a particular form, because of a
belief in the latest technology being best. There is now a
backlash, however, against on-line searching because many users
recognise that the disadvantages of on-line search procedures,
combined with the advantages of manual searching, make on-line
searching much less of a boon than using the latest technology
would suggest. Technology may, of course, serve the needs of the
system but not of the user.

e. Professional beliefs or theory can be an enormous obstacle to
meeting users' needs. At its crudest, this obstacle may take the
form, for example, of a librarian that I once worked with who
would not allow users to use more than one book at a time from a
closed access part of a collection, because it was her
'professional' opinion that it is not physically possible to read
more than one book at once. We now know, of course, that many
users find it essential to consult maybe many documents more or
less simultaneously. At a more sophisticated level, there may
actually be a body of theory that 'drives' a particular practice
which might be completely out of tune with users' needs. For
example, classification theory may develop as an attempt to
discover (or, more correctly, to impose) order in the world of
knowledge. But that theory may bear no relation whatever to
users' experiences, perceptions or needs.

f. Demands

A service that responds to users' demands is, at least, *being* responsive to users. There are, however, two *weaknesses* here. One is that users tend to demand *what is* available, so responding to demand may be largely a *matter of* simply perpetuating current practice. Second, *demands* come only from active users of a service. *It is common* for library or information services to have *among* its potential users a large number of non-users, who fail to make any demands to which the service could respond. But could those potential users nevertheless have *needs?*

These examples may *not* be the best we could find, but they do indicate that *there are* ways in which services can, and do, develop, *other* than in *response* to users' needs. This, of course, raises a *fundamental* problem for the library school curriculum. *On the one* hand, prospective librarians are learning *the theory* and techniques of librarianship/information *studies.* They are being trained to be competent, professional *practitioners.* On the other hand, there is a hint *that the user* may know better than the professional.

3. The need for higher level training

User studies involves the *application of* various social research techniques to the *analysis of* users' information-related needs and behaviour. *Most people* entering the profession will not be skilled *in the use of any* such techniques. Those that enter the profession *with some* kind of social science background will be *familiar with some* of the techniques, but not with their application *in* a library or information environment. Training *is, therefore,* necessary.

Higher level training is necessary for three specific reasons:

a. If it is accepted that services should be responsive to users'
    needs, then the higher level study underlying the development of
    any services should be accompanied by an enhancement of the
    awareness of the need for, and techniques of, user study. The
    need for user study, and the professional's readiness to undertake
    such study, must be continuously reinforced.

b. Students undergoing higher level training are those who are in, or
    will be aspiring to, the more senior professional positions.
    These people are precisely those who will be in a position to
    initiate, and perhaps carry out, studies of users. They must have
    the skills necessary to plan or to conduct such studies.

c. These students are also those who will at some stage be
    responsible for acting upon the results or findings of user
    studies. This is the most important reason for higher level
    training in user studies. It could be argued, by some students,
    possibly legitimately, that in their substantive area of
    professional activity they are unlikely to carry out user studies
    and that, should the need for such skills arise, they could
    instruct themselves or consult colleagues in social science. There
    are two arguments against this.

    i. The first is that there is a tendency for people - including
        librarians - to think that carrying out a user study requires
        no special skills. Library researchers who are expert in
        automation, indexing, cataloguing, or whatever, are not
        necessarily expert in social research techniques and, if
        research is to include any study of users, or of people
        generally, training in such techniques is necessary. Some
        such training in library school is a useful starting point and
        some safeguard against poor research being done later.

ii. The most important argument, however, is that a familiarity
with research methodology is essential, not ony for those who
carry out research, but also for those who 'consume' it.
Anyone who is going to be in the position of reading research
reports and using their results in decision making and service
development (and that should mean most librarians!) must have
the skills to evaluate such reports, and to know what sense to
make of them.

4.   Content and links with other subjects

There are four broad areas that might be considered in user studies.
They are (not in logical order):

a.   the results of past user studies
b.   the need for user studies
c.   the use of user studies
d.   the methodology of user studies

Some people have considered 'user studies' to be a discipline, and
mastery of a discipline would require mastery of its various
components. To think of user studies as a discipline is, however,
mistaken thinking. User studies is simply the application of certain
social research techniques to a variety of problems faced by library
or information service managers. This view has implications for the
content of a user studies course.

Three of the four areas listed above could properly be considered
parts of courses other than a user studies course.

a.   The results of past user studies should be considered in courses
dealing with substantive areas of professional practice. There
are two reasons for this:

- the first is that any area of library service should be responsive to users' needs or it is in danger of developing in the wrong way. This means that, even as students are being taught a particular area of professional theory or practice, they should not be encouraged to think of it simply as a set of facts to be mastered. The ultimate value of any substantive professional area will be determined by whether users need it, whether they can use it, whether they do use it, and whether it could serve the user better. An appreciation of past user studies in the area will help students to answer these questions.

- the second, related, reason, is that the results of user studies should form an integral part of knowledge or of theory in any substantive area. There are, of course, two types of substantive areas of practice that we commonly consider - types of library or service, and areas of professional practice. This comment applies equally to both. It would be pointless in higher level training, for example, to consider, say, the public library in terms of history, legislation, purpose, finance, types of stock and services, intended user groups, etc., without also considering studies of users' behaviour in relation to the public library or people's need for what the service actually supplies or could potentially supply. Equally, it would be unsatisfactory to consider developments in the practice of classification, cataloguing, indexing, or the development of on-line search services or other information services, without paying due attention to past studies of users of such processes or services.

b. It follows from this that questions of the need for user studies should also be considered in courses dealing with substantive areas of professional practice.

Consideration of the need for user studies should arise
automatically if the subject is treated, in teaching it, as
problematic. In higher level training, quesitons should constantly
be raised about what evidence there is, or what evidence is
needed, about users' needs for, and use of, any aspects of library
or information services that are being discussed.

c. Similarly, the use of user studies should be considered as part of
the study of the substantive area of professional practice. In
fact, questions of the need for user studies and of the use of
user studies should arise together - up to a point they are the
same questions.

This is an appropriate point, however, to make another important
comment about the use of user studies, and this comment applies,
in large measure, not only to user studies, but to any
library/information research.

There are recurring complaints about the limited extent to which
the results of library research are applied in practice.
Researchers may complain that library practitioners are not
research-minded, and that they fail to appreciate the implications
of research findings for practice. Library practitioners, on the
other hand, complain that researchers produce research reports
that are too theoretical, fail to make explicit the implications
for practice, and are too long for busy library managers to read
and digest.

Without pursuing any of these arguments here, it can be
acknowledged that the direct application of research results in
practice is not as common as it might be. It must be said that
some, perhaps much, library research is not of the kind that
should or can be immediately applied, but is intended simply to
add to our fund of knowledge or understanding. In any case, the
fact is that much library research, including user studies

research, influences practice not directly, but indirectly through
library education. Important research reports may be read by
library managers who may, in some way, act upon them. But they
will be read by countless more students of librarianship, who will
absorb the work into their general professional knowledge,
thinking and orientation. It is for this additional reason that
treatment of past user studies must be included in the treatment
of substantive areas of professional practice.

Two more things need to be said about the need for user studies
and the use of user studies.

i. First, consideration of the need for and use of user studies
    should be treated as an integral part of library management,
    in the context of information for decision making.

ii. Second, that the need for user studies can be reinforced in a
    course on user studies, and consideration of the use of user
    studies can also be included in such a course. It would be
    most unfortunate, however, if these aspects of user studies
    were confined to a user studies course; the links with library
    management and practice would then not be made, and user
    studies would be seen, as it sometimes now is, as a separate,
    optional, entity.

d. The methodology of user studies

    The fourth aspect of user studies indicated earlier is the
    methodology of user studies. This would be the core of any course
    on user studies.

    Major topics and sub-topics:

    a. The purpose of user studies

        Theoretical/problem solving.

b. Types of study

User study/use study
Use of different kinds of data/information.

c. Qualitative/quantitative paradigms

Features of different styles of research, their origins and uses. (These differences recur throughout the course).

d. Populations/samples

Definition of populations. Sampling frames. Types of statistical sample. "Qualitative" sampling - purposeful or "theoretical".

e. Data collection methods

Interviews/questionnaires/observation, and their variants. Structured/unstructured.

f. Analysis

Manual/computer/qualitative.

g. Interpretation of results, and application of results

Generalisability, uses of non-generalisable research, etc.

5. Contact hours, teaching methods and assessment methods

It is, of course, impossible to specify the number of hours that should be devoted to the user studies course. The amount of time given to any subject will be a function of a combination of the following:

- total time available,
- range and number of 'competing' courses
- priority given to subject
- level of entry competence and level of competence required

While it is agreed in principle that user studies should have a place in the curriculum, in practice it is likely that substantive areas of professional practice are likely to lay legitimate claim to a larger share of available time. User studies, then, is likely to take up a relatively small part of curriculum time; that time can be reduced further if it can be ensured that treatment of user studies is included in other areas, leaving the core user studies course to include primarily methodology.

Teaching methods used will depend upon a variety of factors:

- amount of time available
- background of students
- size of student group
- homogeneity of student group
- resources available

It is likely (but not inevitable) that some formal lecturing will be necessary, but it is recommended that this be kept to a minimum. Much of the factual material to be presented in the course can be done through recommended reading. Class contact should then be used for resolving problems that arise in understanding reading (or lectures) and for discussing problems of application of what has been learned.

As far as possible, teaching should take the form of seminars, rather than formal lectures, to give students maximum opportunity for questioning and discussion.

Discussion of application of research techniques implies a practical orientation in the course, and this should be stressed. The practical orientation can be achieved by requiring the students to participate in:

- designing a user study
- carrying out a user study
- evaluating a past user study

Ideally, a course would involve all these activities, but time may not be sufficient.

Assessment could take a variety of forms. It could, for example, use a conventional written examination, seeking to test mastery of, and recall of, what was 'learned' on the course. It would be preferable, however, to assess by means of an exercise that would bear a much closer resemblance to a 'real-life' exercise, in which any or all of the content of the course could be brought to bear on a problem of real interest. It is unlikely that such a project could include the actual conduct of a user study, so the choice would be between
- a design for a user study, and
- an evaluation of a user study.
Although the approaches taken would differ, the principles being applied would be similar.

6. Pre-requisites, admission tests, etc.

Students come to librarianship and information courses with a variety of backgrounds. Those who come with a social science background are more likely to grasp the methodology of user studies (but are also, perhaps, more likely to have pre-formed ideas about 'appropriate' methodology).

Since the aim of a user studies course within a general library/information training course cannot be to prepare students comprehensively for all aspects of carrying out user studies, it is not important that all start from the same starting point. The user studies course will start from whatever admission requirements are set

for the course as a whole. The one exception is that, since the literature of user studies that students will have to use is almost entirely in English, proficiency in reading English will be essential. The only test that will be required, therefore, is of English proficiency.

7.   Equipment

Requirements for a user studies course fall into two groups:

a.   Those relating to formal teaching. These are no different from general requirements (overhead projectors, perhaps videotape playback machines for videotaped programmes, as they become available, etc.)

b.   If the course is to involve a practical element, then the facilities needed are the same as those required for user studies research:

- inexpensive reprographic services for producing questionnaires, interview schedules, etc.

- portable cassette recorders for recording interviews (with rev. counters, for purposes of indexing qualitative interviews), and blank cassette tapes.

- computing facilities, with social science software, probably SPSS (Statistical Package for the Social Sciences). Other software may be available. It is recommended that any teacher or student involved in social survey type studies should make early contact with the computing service to discover what facilities are available.

It is possible that other facilities for social science research could be used; for example, facilities for small group research in psychology may be used in training in observation. It is hardly likely, however, that such facilities would be provided solely for user studies!

8. Preparation of teachers/resource persons

There is no single best way in which teachers of user studies might prepare themselves. There are several possibilities:

a. Anyone, whatever his background, can do his best to familiarise himself with the existing literature relating to user studies. This will include both reports of user studies and literature on the methodology of user studies. Much of the literature will be relatively easily understood by most library school teachers. Some of the literature will require more advanced training, as will an appreciation of the underlying principles of methodology.

b. User studies is essentially the methodology of social (and market) research, applied to certain library/information problems. Clearly, training in social research techniques will improve an individual's expertise in user studies, both in design or execution of new studies and in appreciation and evaluation of past studies. One word of warning is necessary here, however. There is no concensus in social science on 'proper' scientific method, but any training programme is likely to adopt a particular research paradigm as the 'proper' paradigm. It is quite probable, for example, that social research training would emphasise social survey methodology, at the expense of more qualitative methodology.

c. User studies is one of the few areas in the library/information curriculum where research experience is greatly advantageous to the teacher. Research experience is important both in developing understanding of the application of principles in practice (user studies research, in practice, never conforms to the text book model!) and in supplying concrete examples for students. However modest the project(s), user studies teachers should gain some experience in actually carrying out research.

9.   Books and other resources

There are three groups of literature to which access is needed for students in a user studies course. They are user studies literature, library and information research literature generally and, more generally, social research literature.

a.   User studies literature

The user studies literature includes both the reports of user studies research and the methodological literature. Sometimes, these two aspects are combined.

Many of the research reports should find a place in a general librarianship/information science collection because they are studies of substantive areas of service or practice, rather than because they are user studies. Some deliberate development of the user studies collection may be necessary, however.

The research literature appears in journals and report series. Journals such as Aslib Proceedings, Journal of Documentation, Journal of Librarianship and Social Science Information Studies (from the UK) and College and Research Libraries, Library Quarterly, Library Research, JASIS, etc. (from the USA) have all contained user study reports. Many more English language journals, from Australia, Canada, even India, have included user study reports, as have others such as the South American journals (particularly the Brazilian ones, perhaps).

Three report series are of particular importance - The British Library Research and Development Reports, (from the UK) and NTIS and ERIC (from the US). It is unfortunate that the British Library has ceased its report series in which all reports from projects that it funded were listed. This included all one-off projects, and the work of organisations like Aslib, the Centre for Research on User Studies, etc. Now the series includes only those reports actually published by the British Library R&D Department. Other works, such as those of Aslib and CRUS, have to be located elsewhere.

There are, of course, two excellent tools for finding library research reports, including user studies. They are Current Research in Library and Information Science (formerly RADIALS Bulletin), quarterly, and Library and Information Science Abstracts (LISA), monthly; both are published by the Library Association and both have international coverage. These should both be in a Librarianship/Information Science collection. FID publishes R&D projects in documentation, bi-monthly; it is less comprehensive than Current Research....

There have been several reviews of user studies, some of which are, unfortunately, out of print. Efforts should be made to acquire them where possible. These include:

Annual Review of Information Science and Technology. V.1 - , 1966- . Various publishers. Various volumes have reviews of user studies.

Brittain, J.M. Information and its users: a review with special reference to the social sciences. Newcastle upon Tyne: Oriel: Bath: Bath University Press, 1970.

Cronin, B. Editor. The marketing of library and information services. London: ASLIB, 1981 [ASLIB Reader Series no.4]

Ford, G. Research in user behaviour in university libraries. Journal of Documentation, 29(1), March 1973, 85-106.

CRUS News the newsletter of the Centre for Research on User Studies is published three times per year. It aims to publicize the Centre's activities, courses, publications, etc., to report progress in its research programme, and to bring news of other relevant projects, courses, conferences, publications, etc., to those interested in user studies.

There is also a series of seminal papers about user studies.

Brittain, J.M. Information needs and application of the results of user studies. In: Debons, A. and Cameron, W.J. Perspectives in information science. Leyden: Noordhoff, 1975.

Brittain, J.M. Pitfalls in user research, and some neglected areas. Social Science Information Studies, 2(3), July 1982, 139-148.

Ford, G. Editor. User studies : an introductory guide and select bibliography. Sheffield: CRUS, 1977. [CRUS Occasional Paper no.1] [BLR&DD Report no.5375]

Streatfield, D. Moving towards the information user: some research and its implications. Social Science Information Studies, 3(4), October 1983, 223-240.

Wilson, T.D. On user studies and information needs. The Journal of Documentation, 37(1), March 1981, 3-15.

Wilson, T.D. Recent trends in user studies: action research and qualitative methods. Berlin: Freie Universitat Institut fur Publizistik und Dokumentationswinsenschaft, 1980.

b. Library and information research literature

This includes journal, report and monograph literature and, again, includes reports of research projects and methodological literature. The journals and report series mentioned above are those that report library and information science research and methods generally. There is a number of methods texts that deserve particular mention:

Line, M.B. Library surveys: and introduction to the use, planning, procedure and presentation of results. Second edition revised by Sue Stone. London: Library Association, 1982.

Martyn, J. and Lancaster F.W. Investigative methods in library and information science: an introduction. Arlington, Vi.: Information Resources Press, 1981.

Bundy, M.L. and Wasserman, P. (eds) Reader in research methods for librarianship. Washington: NCR Microcard editions, 1970.

Busha, C.H. and Harter, S.P. Research methods in librarianship: techniques and interpretation. New York: Academic Press, 1980.

Social Science Information Studies, 1(4), July 1981. Special issue on qualitative approaches to the study of information problems.

c. Social research

User studies research draws upon the methodology of sociology and the social sciences. It would be greatly beneficial if the librarianship course is carried out in an institution that also undertakes teaching and research in sociology, in which case it would be hoped that a substantial collection of research methods literature would already be available. If not, then a selective collection would have to be developed and this, presumably, would be primarily of monograph material. There are hundreds of social research methods texts to choose from. The most important things to consider when selecting are:

- relevance to South American context

- to include all research 'styles' (i.e. quantitative, survey style and qualitative, ethnographic style).