Navigating Research
How can scholarly reference meet users’ changing needs?

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Market Research, Oxford University Press
Research Methodology

• Review of existing literature (Jan 2017): e.g. industry white papers, Library and Information Science research, and internal OUP research.

• In-depth interviews (February – April 2017): Hour-long interviews were conducted with librarians, faculty, and students, following a semi-structured format.

• Librarian survey (April – May 2017): surveyed librarians from academic institutions in the UK and North America.
In-Depth Interview Sample

North America Institution categories:
- **Group A** included Doctoral Universities with classification of ‘Highest Research Activity’ and postgraduate Research Institutes.
- **Group B** included Doctoral Universities with classification of ‘Moderate Research Activity’ and Master’s Universities with Larger Programmes.
- **Group C** included Baccalaureate (‘Liberal Arts’) Colleges.

UK Institution categories:
- **Group 1**: ‘Higher Research Income’ (more than £100m).
- **Group 2**: ‘Medium Research Income’ (£25m to £100m).
- **Group 3**: ‘Lower Research Income’ (less than £25m).

### User Groups

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>North America</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Librarians</td>
<td>6</td>
<td>10</td>
<td>16</td>
</tr>
<tr>
<td>Academic Faculty</td>
<td>2</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>End-users</td>
<td>3</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>12</td>
<td>22</td>
<td>34</td>
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</table>

### Institutions

<table>
<thead>
<tr>
<th></th>
<th>Librarians</th>
<th>End-users</th>
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<tbody>
<tr>
<td>Group A/1</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Group B/2</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Group C/3</td>
<td>5</td>
<td>4</td>
</tr>
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### Overview: Reference and Users’ Changing Needs

<table>
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<tr>
<th>Drivers of Change</th>
<th>Effects of Change on User needs</th>
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<tbody>
<tr>
<td>Basic factual information is conveniently and freely available online.</td>
<td>Needs for Scholarly Reference content shift away from brief, factual resources, and towards in-depth, analytical overviews of topics and scholarship.</td>
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<td>The focus of scholarly research publications (e.g. journal articles) becomes narrower and more specialized.</td>
<td>Users – including specialists – increasingly require guidance to areas of scholarship which are relevant to their research but are unfamiliar to them.</td>
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<td>Interdisciplinary research and teaching is increasingly significant.</td>
<td>Users more frequently need introductory guidance to key topics and scholarship in other disciplines.</td>
</tr>
<tr>
<td>Users decreasingly recognize, or think of, ‘Reference’ as a category of resources.</td>
<td>Users express a need for guidance to key themes and overviews of scholarship in unfamiliar areas, but do not know where to look for such resources.</td>
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</table>
A need for background information and terminology is common in the early stages of researching a topic.

Speed and efficiency are valued above all.

Users wish to be confident of finding material relevant to their topic, so familiar and comprehensive resources — e.g. Wikipedia — are popular.

‘I just appreciate that there’s one place where I can find information with a broad overview. ... It’s a place for me to start to figure out what I should be searching for.’

—Undergraduate Student [University with ‘Highest Research Activity’, USA]
Librarians’ perspective on usage levels

Q: In general, how would you describe the levels of usage at your institution, for the following types of resources?

- Subject dictionaries
- Subject encyclopedias
- Handbooks
- Bibliographical resources

N=113; 114; 113; and 115 respectively.

Librarian Survey, April/May 2017.
In-Depth Exploration

• Users described a need for resources offering in-depth guidance to a field of study and its scholarship.
• For this purpose, fewer free online sources offering such guidance.
• Two trends appear to be expanding such needs:
  • 1) the increasingly specialized character of research publications;
  • 2) the growing importance of interdisciplinary research and teaching.
Increasing Specialization

• Specialization and narrowing focus makes research publications hard for non-experts to navigate or evaluate.

• Web-scale search: users struggle to identify the most relevant and important material.

• Users described the need for such resources, but were not always aware of where they might be found:

‘I think there are a lot of times when I would appreciate something between Wikipedia level and research paper level and that can sometimes be difficult.’
—Undergraduate Student [University with ‘Highest Research Activity’, USA]
Interdisciplinary Themes

For interdisciplinary research and teaching, users need guidance to unfamiliar subject areas.

This may be a self-contained overview, or something to guide further exploration.

However, users do not always know where such guidance might be found, and have limited time to search for it.
Librarians’ views of the importance of reference resource types for different user groups

(Chart represents those selecting the top 2 categories (‘Very important’ or ‘Important’) on a 5-point scale)

Q: How important do you feel these content types are in supporting the work of the following groups? Scaled response: Not important; Slightly important; Moderately important; Important; Very important. (N=143)

Librarian Survey, April/May 2017

Subject dictionaries
Subject encyclopedias
Handbooks
Bibliographical resources

Undergraduate students
Graduate / Postgraduate students
Researchers and Academic faculty
Conclusions

• Users describe a need for contextual information and guidance to help them to navigate a new topic or body of scholarship.

• Librarians report that users find relevant Reference content helpful. However, many do not know where to seek such content, or think of ‘Reference’ as a category of resources.

• Librarians emphasize article-level indexing for discoverability. But some also use subject guides (e.g. LibGuides) to highlight Reference and other research resources.

• The question of how to connect users to relevant Reference content remains a shared challenge for users, librarians, and publishers.
For further detail, please download our White Paper:

**Navigating Research:**
How academic users understand, discover, and utilize reference resources

www.oup.com/academic/navigatingresearch