IS THE MEDIUM THE MESSAGE?

Examining Transactions Conducted via Text in Comparison with Traditional Virtual Reference Methods

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Outline

- Introduction & Context
- What does the literature say?
- Findings
- Implications for practice
- Methods
  - *How to do this at your institution*
- Conclusion
- Questions
Introduction & Context

- McGill University Library: population of 40,000 students
- Virtual reference service via chat & email since 2006
  - Total of 6,528 questions in 2016-2017
  - QuestionPoint (OCLC)
  - Non-consortial
  - Staffed by public services librarians & second-year MISt students
  - In 2016, texting introduced as pilot project
Current Study

- Seeks to determine:
  - If the texting service is filling a different information need by examining the level of difficulty and the topic of questions

- Research questions:
  - Does the level of complexity of the questions arriving via virtual reference vary, depending on the choice of medium through which they are sent?
  - Does the type/topic of questions vary, depending on the choice of medium through which they are sent?

- Results compared with a previous study (2014) regarding the level of complexity and type/topic of chat and email questions
Literature Review

- Texting is very different

Users of texting seek “brief and simple answers” (Luo, 2011)

Users are “asking questions that are relatively easy to answer via text” (Breitbach & Prieto, 2012)

We should “respond as simply as possible to a reference question” (Vecchione & Ruppel, 2012)

Users “self-select which tool is best adapted to their query” (Gervasio, 2014)
Texting is no different.

“The types of questions patrons asked resembled questions asked through chat and face-to-face” (Vardeman & Barba, 2014)

“Reference service offered via text can and should resemble reference service that happens anywhere else” (Pearce, 2010)

“We treat each SMS query as we would any other reference transaction, and our patrons get better service because of it” (Pearce, Collard, & Whatley, 2010)

“Our analysis of SMS transcripts ...has permitted us to fully embrace a venue-blind approach to service” (Collard, Whatley, & Pearce, 2011)
Question Category Definitions

■ Basic
  • Responds to a simple question using library information sources (catalogue, website, ready reference)
  • e.g. How do I borrow a book?

■ Intermediate
  • Assists users with intermediate-level questions or support, may require use of several information sources, and often involves user instruction
  • e.g. How do I find information on depression in the elderly?

■ Advanced
  • Responds to a user's question using advanced expertise in the service area. Interactions are often multi-faceted and/or inter-disciplinary and subject specialists may need to be consulted
  • e.g. I would like to conduct a systematic review on the following topic: In people with multiple sclerosis, what is the extent to which a walking intervention, compared to no intervention, improves self-reported fatigue?
Question Level

Text

Chat & Email

Advanced

Basic

Intermediate

Advanced

Basic

Intermediate

Advanced
Question Level: Text vs. Chat vs. Email

- **Basic**
  - Text: 106
  - Chat: 51
  - Email: 61

- **Intermediate**
  - Text: 23
  - Chat: 77
  - Email: 66

- **Advanced**
  - Text: 1
  - Chat: 2
  - Email: 3
Findings: Question Type/Topic

Text
- Known item searching: 10%
- Loans / renewals: 17%
- Reference / research: 19%
- Access to e-resources: 1%
- Library services: 48%

Chat & Email
- Known item searching: 22%
- Other: 7%
- Loans / renewals: 19%
- Reference / research: 16%
- Access to e-resources: 22%
- Library services: 14%
Question Type/Topic: Service Categories Subdivided

Text

- Known item searching: 15%
- Services: Other: 10%
- Other: 5%
- Access to e-resources: 18%
- Services: Hours: 22%
- Loans / renewals: 17%
- Reference / research: 19%

Chat & Email

- Known item searching: 22%
- Services: Policies: 8%
- Services: Other: 7%
- Other: 15%
- Access to e-resources: 19%
- Loans / renewals: 19%
- Services: Hours: 1%
- Reference / research: 16%
- Services: Policies: 5%
- Services: Other: 8%
Referrals

Text

- Yes: 10%
- No: 90%

Chat & Email

- Yes: 27%
- No: 73%
Findings: Chat & Email Question Type/Topic

2014
- Known-item searching: 22%
- Library services: 13%
- Access to e-resources: 16%
- Loans/renewals: 18%
- Reference/research: 17%
- Other: 14%

2017
- Known-item searching: 22%
- Library services: 14%
- Access to e-resources: 22%
- Loans/renewals: 19%
- Reference/research: 16%
- Other: 7%
Implications for Practice

■ How to choose between different mediums when initiating a virtual reference service
  • *Begin with chat - highly popular* (Chow & Croxton, 2014)
  • *Pilot and see the volume in email and text*

■ Things to consider when expanding or reducing services
  • *If looking to expand, pilot and look not only at volume but also differences in question types*
  • *If looking to reduce, look at volume in each medium*
Implications for Practice

- Questions received via text can inform changes to library (e.g. help to improve web site information, signage, etc.)

- Texting is different and may require different methods of promotion and service delivery
  - Less advertising on the internet and more through other means
Methods

■ Sample period
  • Texting pilot project June 4th, 2016 to June 4th, 2017

■ Sample size:
  • 130 texts (total of transactions), 130 each of chats and emails
    • Chat & emails selected using systematic random sampling (sampling interval of 29 for chats and 26 for email)

■ Transactions coded by two librarians in an Excel spreadsheet
  • A codebook was used to ensure consistency of the analysis
  • To enhance inter-coder reliability, previously coded questions were randomly sampled and re-coded by the other coder
Methods: Data Collected

- Means of communication (automatically collected): text, chat, or email
- Determined by coders using pre-established coding scheme:
  - Question referred: Y/N
  - Level of complexity: basic, intermediate, advanced
  - Question type/topic:
    - Library services: Policies
    - Library services: Hours
    - Library services: Other
    - Issue with access to e-resources
    - Reference/research
    - Loans/renewals
    - Known item searching
    - Other
# Methods: Data Collection Instrument

| A   | B                  | C        | D        | E        | F        | G       | H       | I       | J         | K         | L         | M         | N         | O         | P         | Q         |
|-----|--------------------|----------|----------|----------|----------|---------|---------|---------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 2   | Question           | text     | chat     | e-mail   | Y        | N       | basic   | intermediate | advanced | mcgill library services: other | mcgill library services: policy | mcgill library services: hours | issue with access to e-resources | mcgill library services: loans/renewal | known item searches | other     |
| 3   | 12513630           | text     | chat     | e-mail   | Y        | N       | basic   | intermediate | advanced | mcgill library services: other | mcgill library services: policy | mcgill library services: hours | issue with access to e-resources | mcgill library services: loans/renewal | known item searches | other     |
| 4   | 12613119           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 5   | 12612318           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 6   | 12612291           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 7   | 12606109           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 8   | 12600590           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 9   | 12580650           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 10  | 12580532           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 11  | 12562454           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 12  | 12550870           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 13  | 12550767           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 14  | 12544717           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 15  | 12542267           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 16  | 12542266           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 17  | 12542285           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
| 18  | 12542288           | 1        | 1        | 1        | 1        | 1       | 1       | 1       | 1         | 1         | 1         | 1         | 1         | 1         | 1         | other     |
How to Do It in Your Library

- Let your research question not the abundance of available data guide your project
  - Determine what you want to find out
- Is the data easily available/downloadable?
  - If not, maybe this is not the right methodology for you
- Consider sample size
  - Keep it to manageable proportions
- Excel rocks!!!
  - Have somebody who is good at it
- Team of no more than 3-4 people:
  - Inter-coder reliability
  - General manageability of the project
Conclusion

- Future research
- Just because users ask basic questions, are they averse to having longer and more complex interactions via text?
- Is texting too personal for the library?
- What is your experience at your institution?
References


