Customer Focused Library
Research Methods Toolkit
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Don't try to change people's behavior: identify and design for it.
-Ann Marie Luthro, VP Marketing, Envirosell

One of the key lessons learned by the libraries participating in the Customer Focused Library project was that we need to change how we track and observe patron behavior. Circulation statistics, website hits, reference transactions, and other traditionally gathered library statistics are good, but do not focus on how people are using the library space itself. Other data needs to be collected and considered in order to analyze what changes are needed.

Set Yourself Up for Success

In order to effectively gather information about the use of your library:

- Dedicate staff time to the effort – make sure that data-gathering tasks are part of people's jobs.
- Study all times of day, days of week – usage differs at different points in the day. Make sure you aren't getting skewed data because of a lack of study on weekends or in the evening.
- Train staff to gather without judgment – If you collect data, make sure staff knows to be objective and track everything they see within the study parameters. Make sure they understand their role as an objective observer.
- Train, try, assess, retool – Your first efforts may not be as successful, based on a number of factors. Make sure you are regularly compiling data in the early stages to find errors in the collection method or with collectors.
- Consider bringing in outside opinions – Interns, volunteers, and other non-library staff may have a different perspective on what you're studying, and can lend an important point of view.
- Train all staff to observe and report – If you build a culture of observation and discussion, your research findings won't be a surprise, and extensive research may not be as necessary.

Tools to Use

The following pages have tools that you can use to study your library, based on Envirosell's model of observing patrons, taking exit surveys, and using video footage. You can incorporate any of these three methods, and the tools are a way for you to start.

Density Maps – This tool is a way to track where patrons are by age and gender in your library at specific periods of time. This sheet can be used at regular intervals (half hour,

hourly) to track usage of the library space over time. This tool will show trends of what kinds of patrons are using what spaces, and what space is unutilized or underutilized.

Activity Map – This tool tracks patrons by age, gender, ethnicity and behavior. Each of the behaviors can be customized based on your library interests. It is a similar tool to the Density Map, but is further broken down by patron behavior.

Patrons Who Visit Each Section First – This tool is used by Envirosell staff to note where patrons first go for help in the library. This could be used periodically through the year to track where people are seeking and finding help.

Patrons Who Request Each Assistance Type – Unlike the other tools, this could be implemented at service desks across the library. People who receive questions on the floor could count statistics as well to get a robust idea of what kinds of assistance is needed for patrons.

Computer Use Chart and *Computer Length of Use Chart* – These are other observation tools to see if there are patterns in usage of your computers, and to assess if more workstations are needed. You could add in patron ages or gender to break down needs further.

	AGE	GENDER
1	21	X O
2	34	X O
3	13	X O
4	13	X O
5	12	X O
6	65	X O
7	61	X O
8	44	X O
9	36	X O
10	33	X O
11		X O
12		X O
13		X O
14		X O
15		X O
16		X O
17		X O
18		X O
19		X O
20		X O
21		X O
22		X O
23		X O
24		X O
25		X O
26		X O
27		X O
28		X O
29		X O
30		X O
31		X O
32		X O
33		X O
34		X O
35		X O
36		X O
37		X O

	AGE	GENDER
38		X O
39		X O
40		X O
41		X O
42		X O
43		X O
44		X O
45		X O
46		X O
47		X O
48		X O
49		X O
50		X O
51		X O
52		X O
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56		X O
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59		X O
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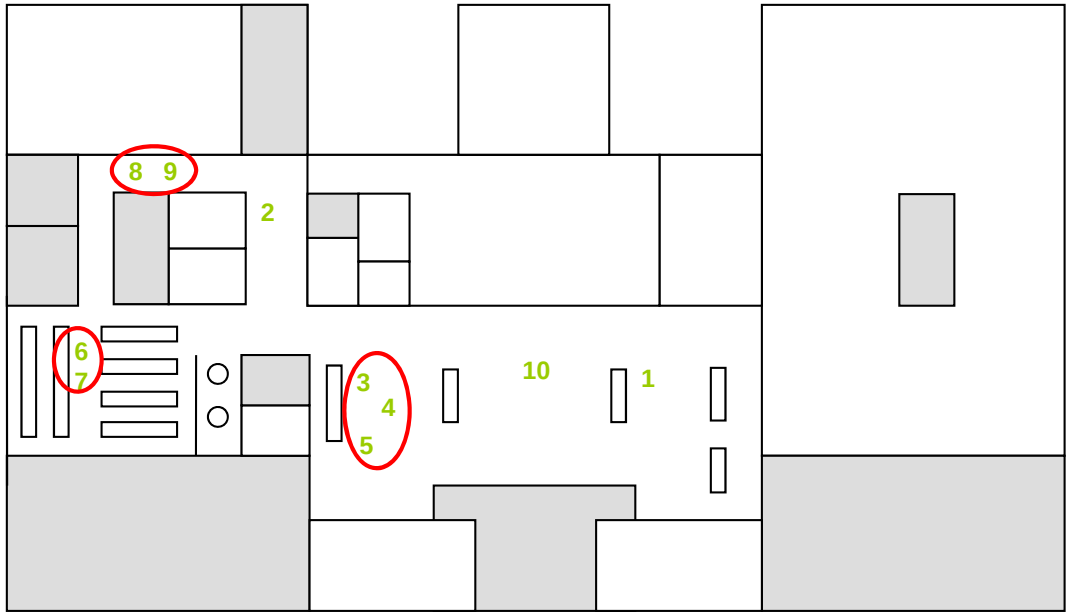
61		X O
62		X O
63		X O
64		X O
65		X O
66		X O
67		X O
68		X O
69		X O
70		X O
71		X O
72		X O
73		X O
74		X O

Time of day:_____ **Date:** _____ **Site:**_____ **ID**_____

Mark the number on the map and write in the age and gender (X=male, O=female) for each library patron. If the patrons are in a group, circle the numbers that represent that group. The first person you plot will be number 1, the second is 2. If the 3rd, 4th and 5th people are a mother and her two children, circle them to indicate they are together. This goes for friends and couples too.



PLACE LIBRARY MAP HERE

Time of day:_____ Date: _____Site:_____ID_____

Mark the number on the map and check the appropriate demographic (X=male, O=female) and activity boxes on the plot form. If the patrons are in a group, circle the numbers that represent that group. The first person you plot will be number 1, the second is 2. If the 3rd, 4th and 5th people are a mother and her two children, circle them to indicate they are together. This goes for friends and couples too.

	age	gender	ethnicity	Moving	Sitting	Standing	Lean/Squat	Reading	Conversing	Sleeping	Laptop	Headphones	Cell Phone	Group Study	People Watch	Child Care	Playing (Child)	snacking	Other ____	Other ____	Other ____
1	16	x o	C		x																
2	18	x o	C			x															
3	22	x o	AF		x						x										
4	24	x o	C		x						x										
5	31	x o	AS		x						x										
6	35	x o	C			x							x								
7	36	x o	C			x															
8	65	x o	AF			x															
9	63	x o	AF			x		x													
10	13	x o	HI		x			x													
11		x o																			
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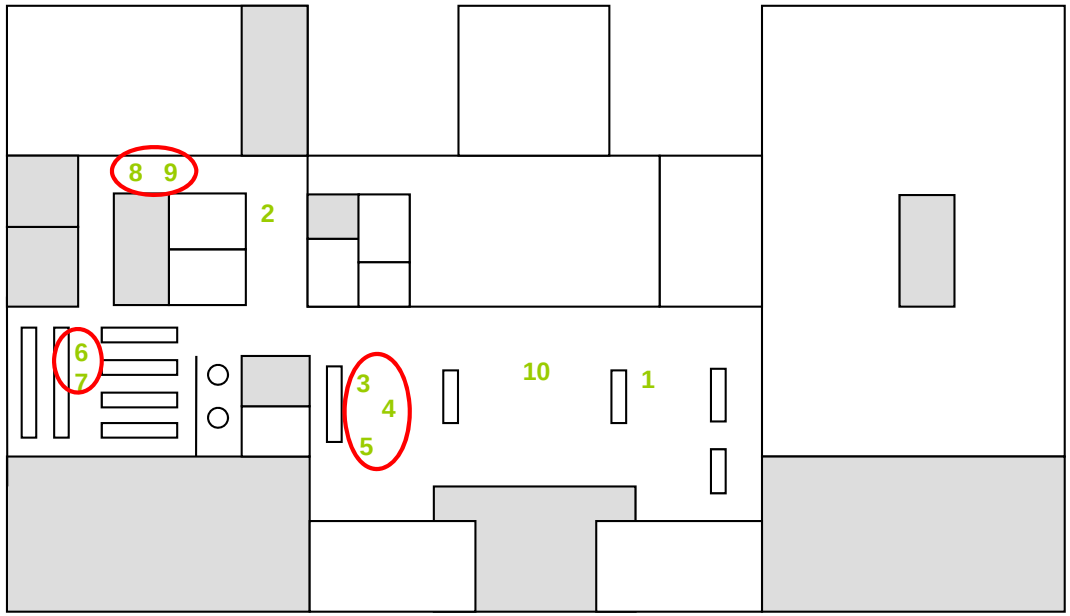

PLACE LIBRARY MAP HERE

Ethnicity Key
C—Caucasian (non-hispanic)
AS—Asian
AF—African-American
HI—Hispanic
OT--Other

Time of day:_____ Date: _____ Site:_____ ID_____

Tally the number of Patrons Who Visit Each Section First	
Circulation Desk	
Adult Public Area	
Computer Workstation	
Computer Lab	
Children's Reference Desk	
Children's Fiction	
DVDs	
Reference Desk	
Meeting Room	
Online Catalogue	
Fiction	
Non-Fiction (Circulating Collection)	
Periodicals	
Books for Sale	
Internet (Quick Use)	
New Fiction	

From a vantage point with good sightlines (circulation), tally where each patron (group) stops first.

Date: _____Site:_____ID_____

Tally the number of patrons who request each assistance type	
Self-Checkout	
Item Request	
Research Question	
Services	
Recommendation	
Section Location	
Services Offered	
Fees	
Purchase	
Computer Assistance/Operations	
Internet	
Printing	
Computer Technical Service	
Other	

Throughout the day, keep track of the different types of questions that patrons ask. They can range from the most basic directional to more involved research-type questions. If you encounter questions that don't easily fall into one of the above categories, place them in "other." Keep track of those "other" topics so that new types of assistance can be created as needed.

Date: _____ Site:_____ ID_____

At the beginning of each hour, mark which computers are being used.

Time of Day → / Computer Number ↓	9	10	11	12	1	2	3	4	5	6	7	8
#1												
#2												
#3												
#4												
#5												
#6												
#7												
#8												
#9												
#10												

Date: _____ Site:_____ ID_____

As each computer is used, please monitor the length of usage by patrons.

Timeslot → / Computer Number ↓	1	2	3	4	5	6	7	8	9
#1									
#2									
#3									
#4									
#5									
#6									
#7									
#8									
#9									
#10									