



FEDERATION OF ONTARIO PUBLIC LIBRARIES RESEARCH

Prepared for: Federation of Ontario Public Libraries Research Task
Force

May, 2015

Background

Library Usage

Accessing the Library

Library Services

Value of the Public Library

Future Outlook

Conclusions

- Fourth wave of a study that has been conducted every five years since 2000
- Objectives:
 - Understand Ontario residents' opinions about the use, role and impact of public libraries, and how those opinions have changed over time
 - Separate public opinion by level of usage of public libraries (including non-use)
 - Identify areas of strength and weakness for the public library
- Results will be used to:
 - Monitor status of the library
 - Formulate strategy
 - Identify priorities
 - Provide input to a new marketing communication plan

Both surveys made available in English and French

Telephone Survey

- 600 telephone interviews conducted from February 26th to March 16th, 2015

Online Survey

- 1,102 online surveys conducted from March 5th to March 10th, 2015 using Delvinia's *AskingCanadians* online panel

- Significant differences exist between phone and web respondents

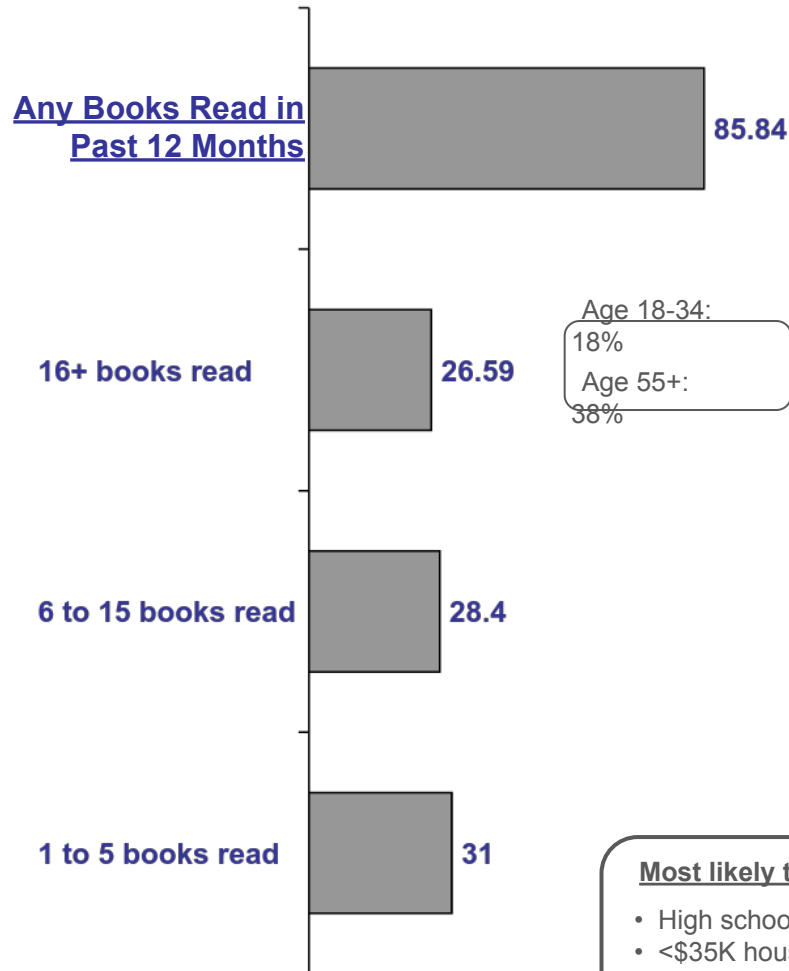
	<u>Phone</u>	<u>Web</u>
Households with children	40%	22%
Graduated college/university	55%	70%
Live in Metro TO / Urban GTA	39%	52%
Born outside Canada	19%	24%

Age and gender controlled by quotas

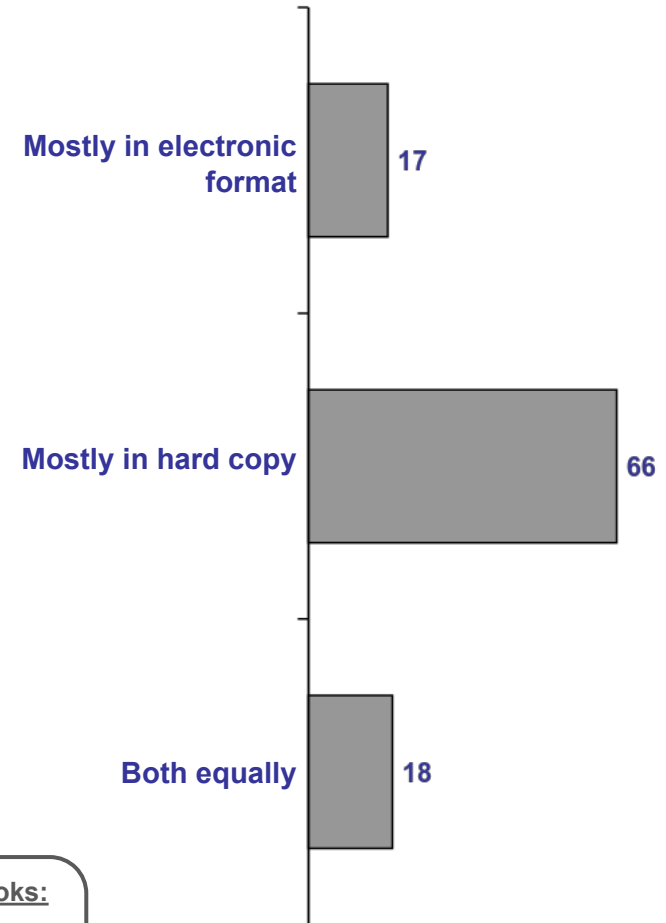
- Also differences in the way people respond to questions based on methodology
 - Multiple response questions
 - Rating scale questions
 - Social desirability bias

Most Ontarians read books, and still primarily in hard copy format

Books Read in the Past Year



Format of Books Read in the Past Year

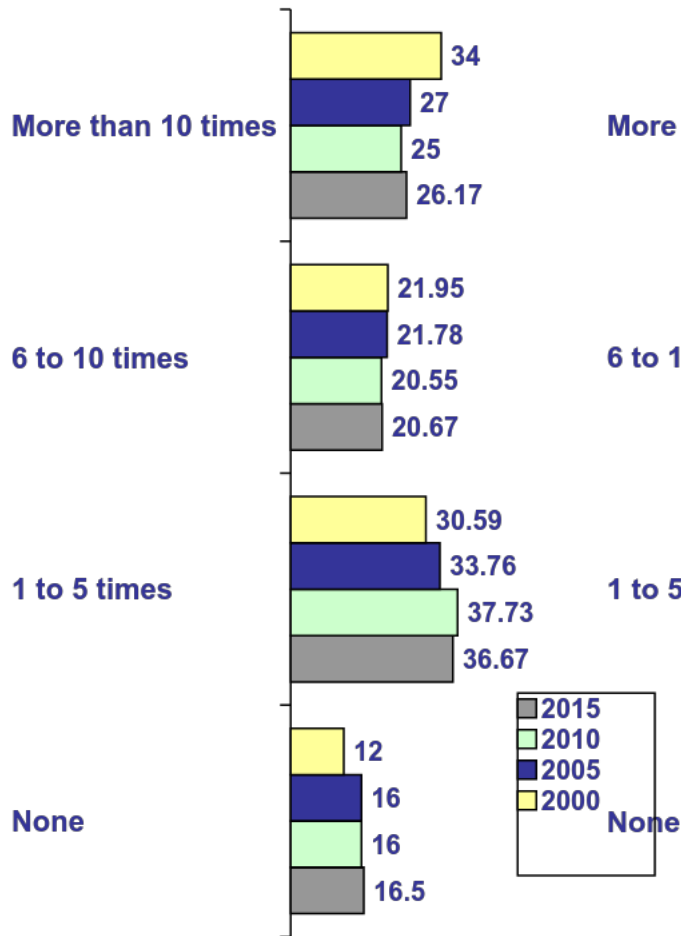


Most likely to have read no books:

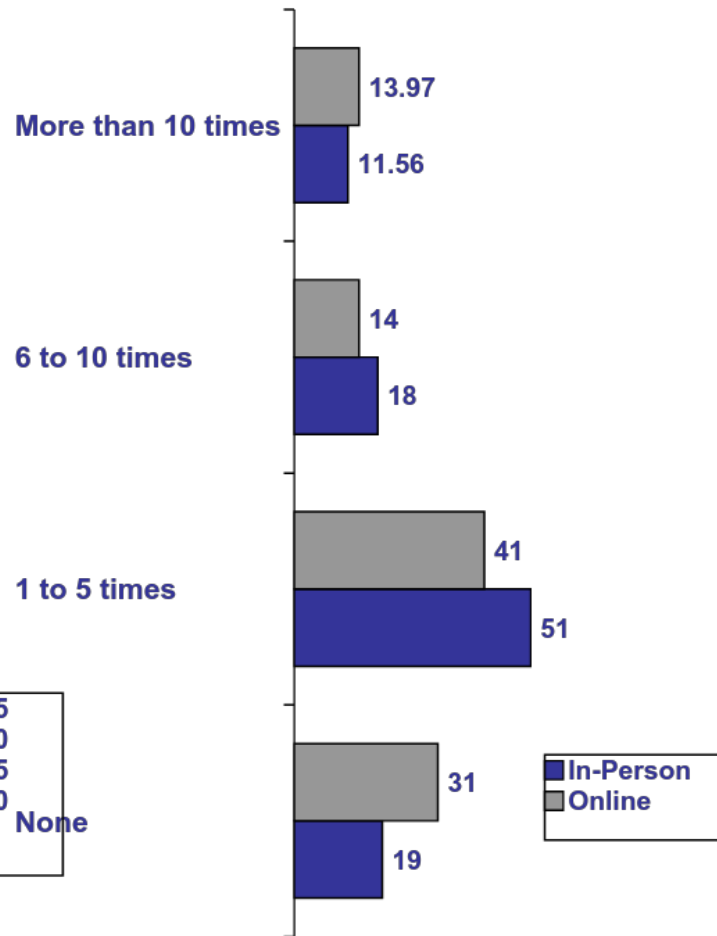
- High school or less education 26%
- <\$35K household income 23%
- Singles 20%
- Men 19%

Bookstore usage has remained steady, with a substantial portion of traffic swinging to online visits

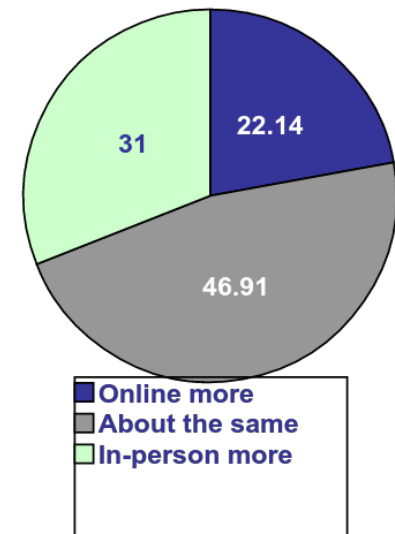
Past Year Bookstore Visit Frequency



Past Year Bookstore Visit Frequency

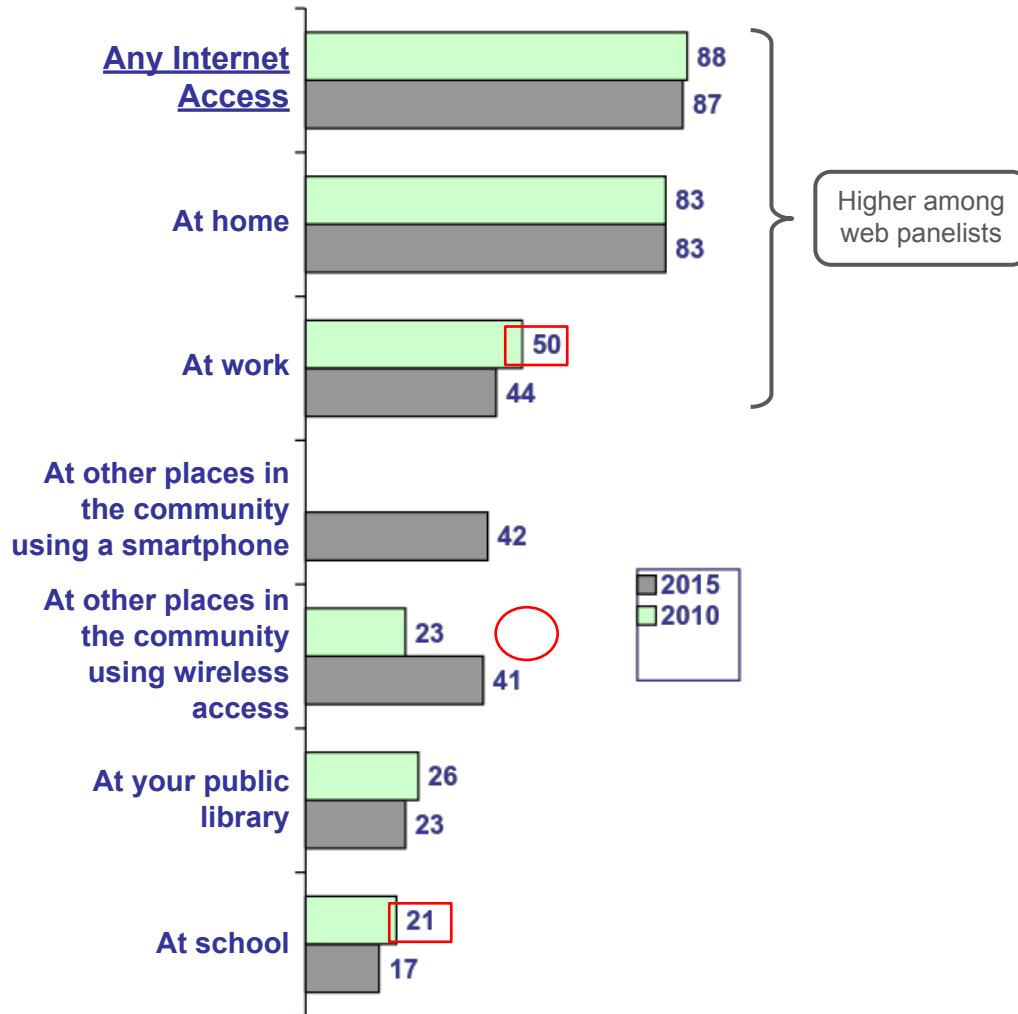


Relative Frequency of Visiting Bookstore Online and In-Person

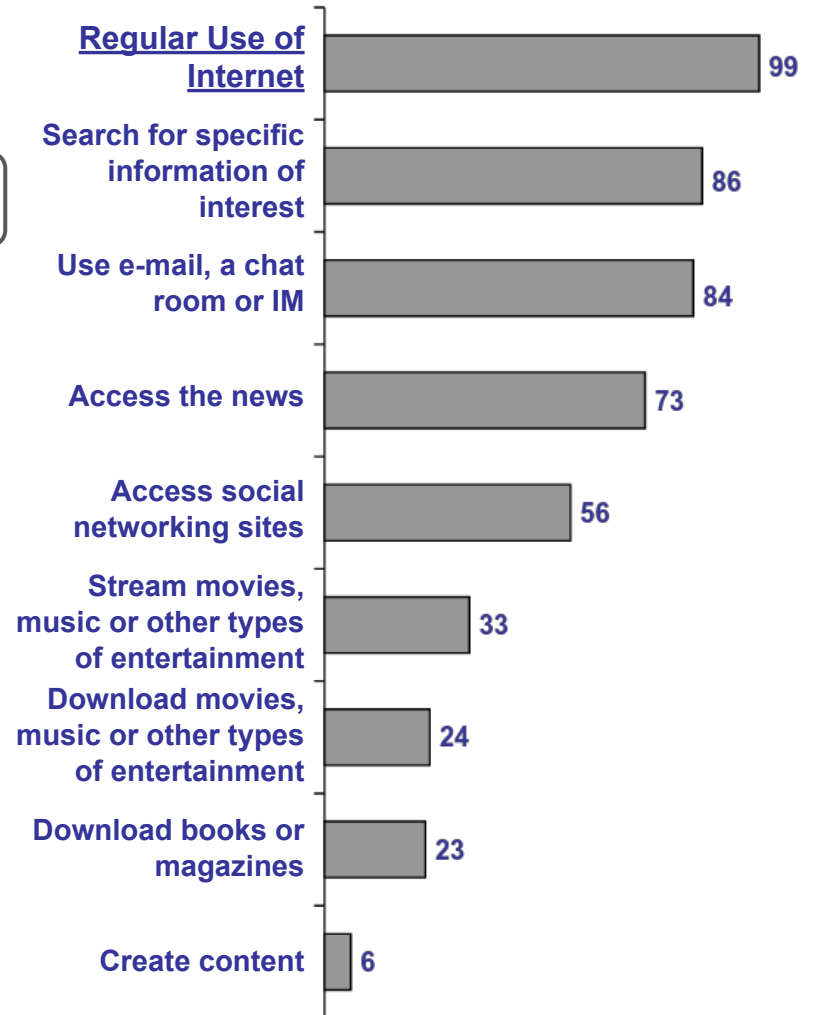


While Internet penetration has not changed in the last five years, the ways in which people access the Internet have shifted

Ways Internet Was Accessed in the Past Year

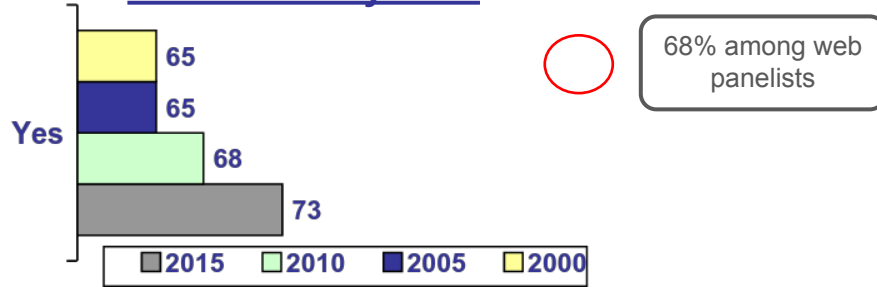


Uses of Internet

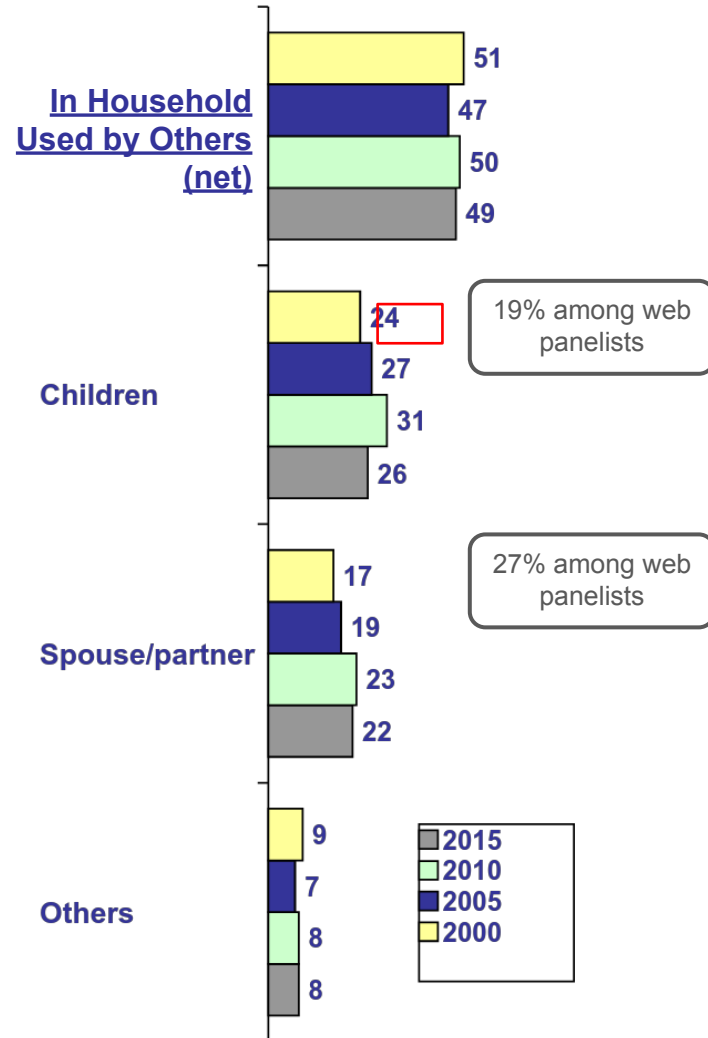


Household use of the public library may be slipping slightly, despite a reported increase in library card ownership

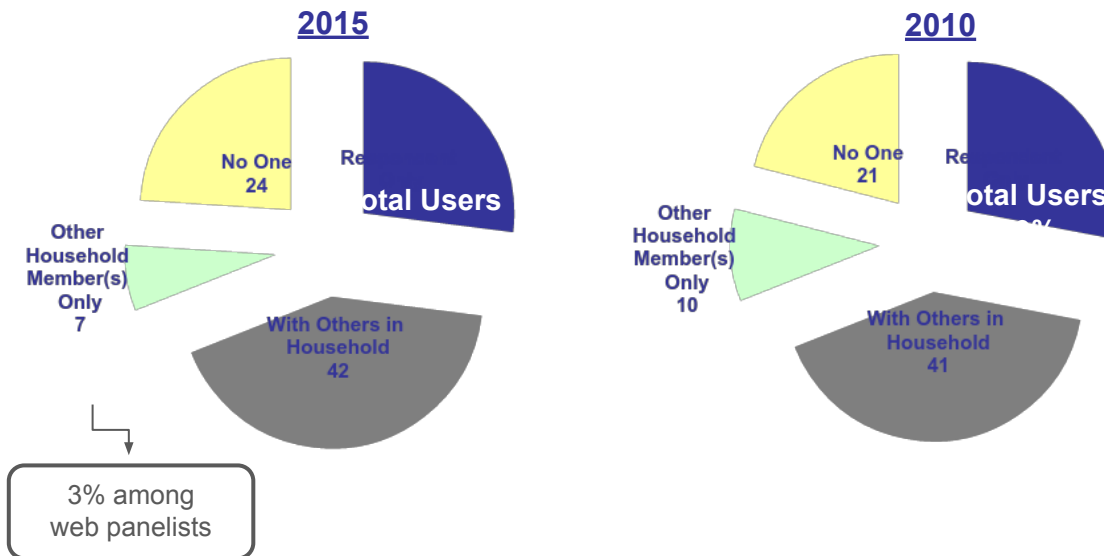
Have a Library Card



Past Year Use of Public Library by Other Household Members

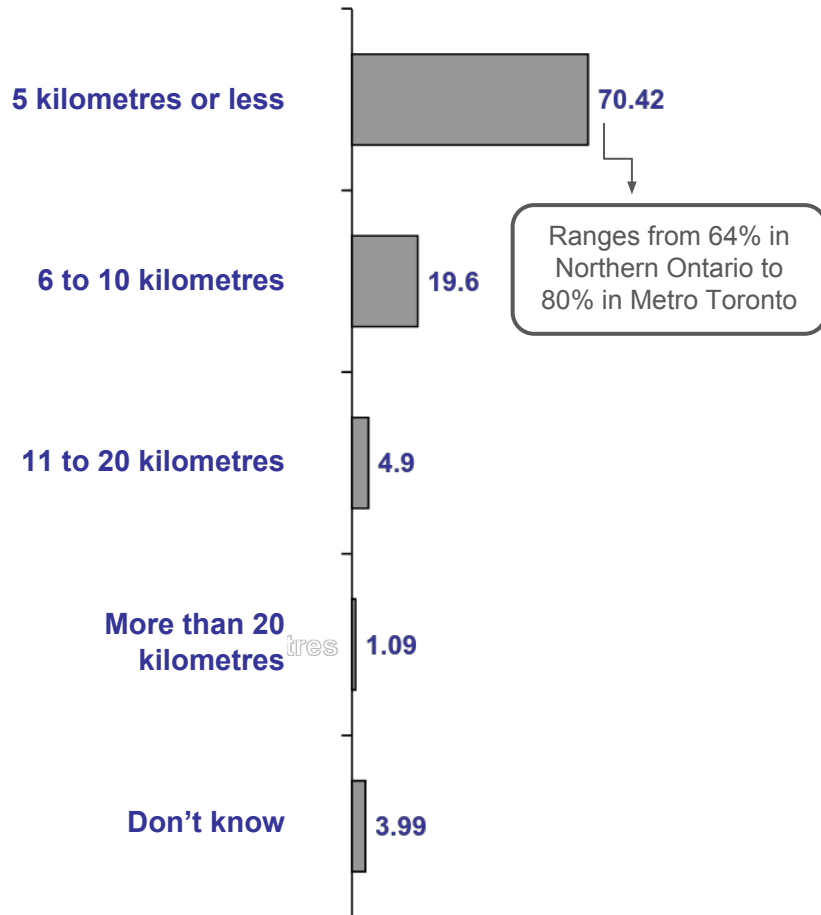


Total Household Usage of the Public Library

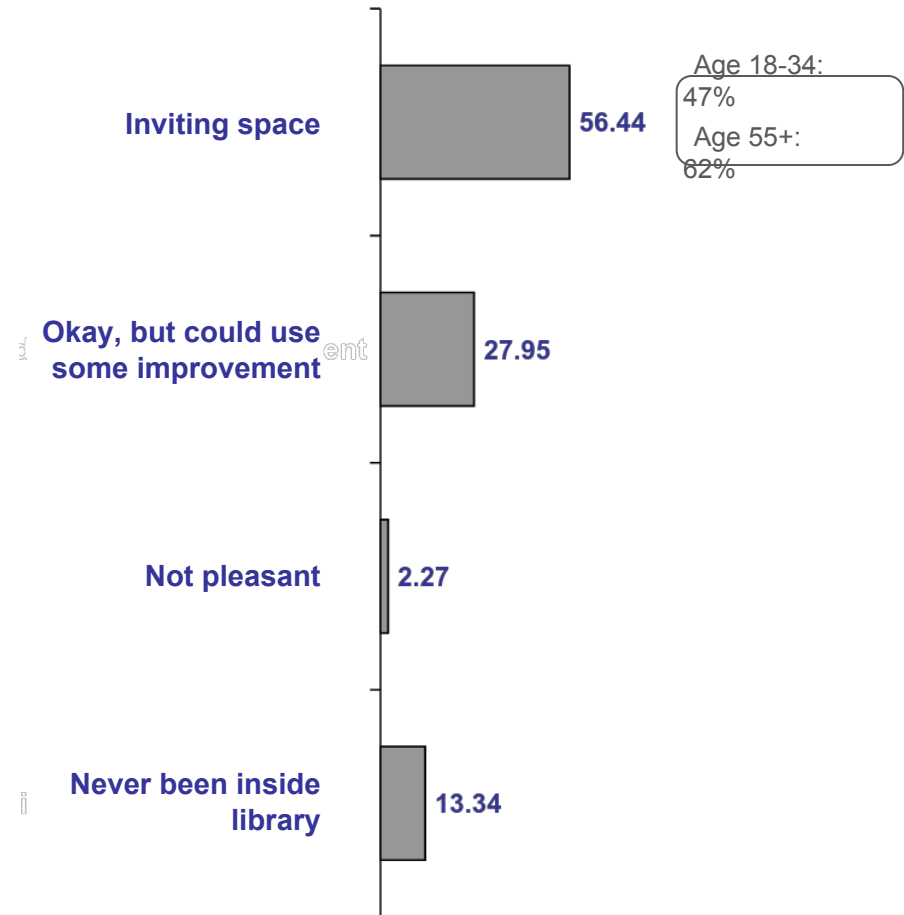


For most Ontarians, the public library is located close to home and tends to be an inviting place

Distance from Home to Closest Library

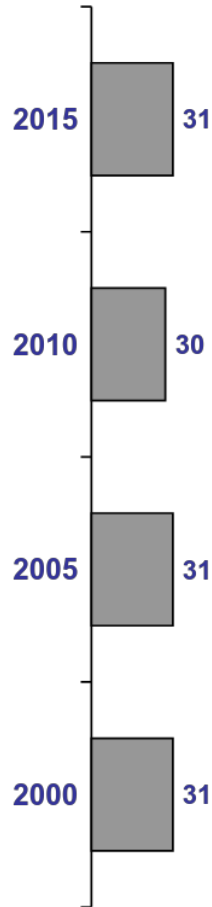


Condition of Library Closest to Home

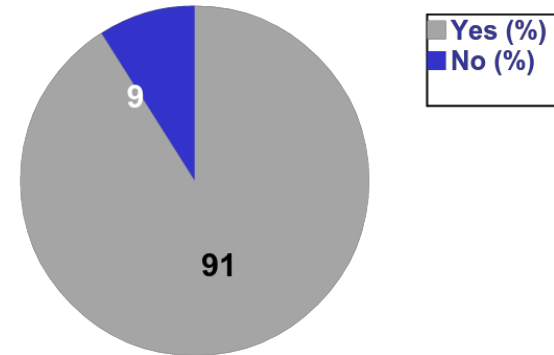


Nearly one-third of those surveyed have not used the public library in the past year (although most have used it sometime in the past)

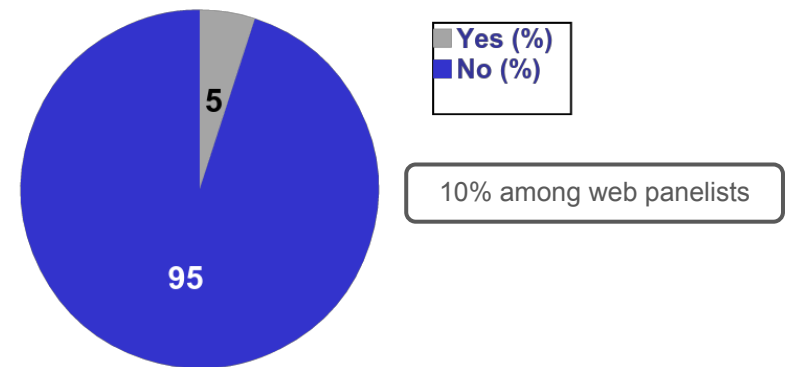
Don't Use the Public Library



Ever used the Public Library

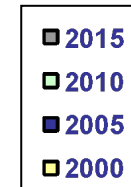
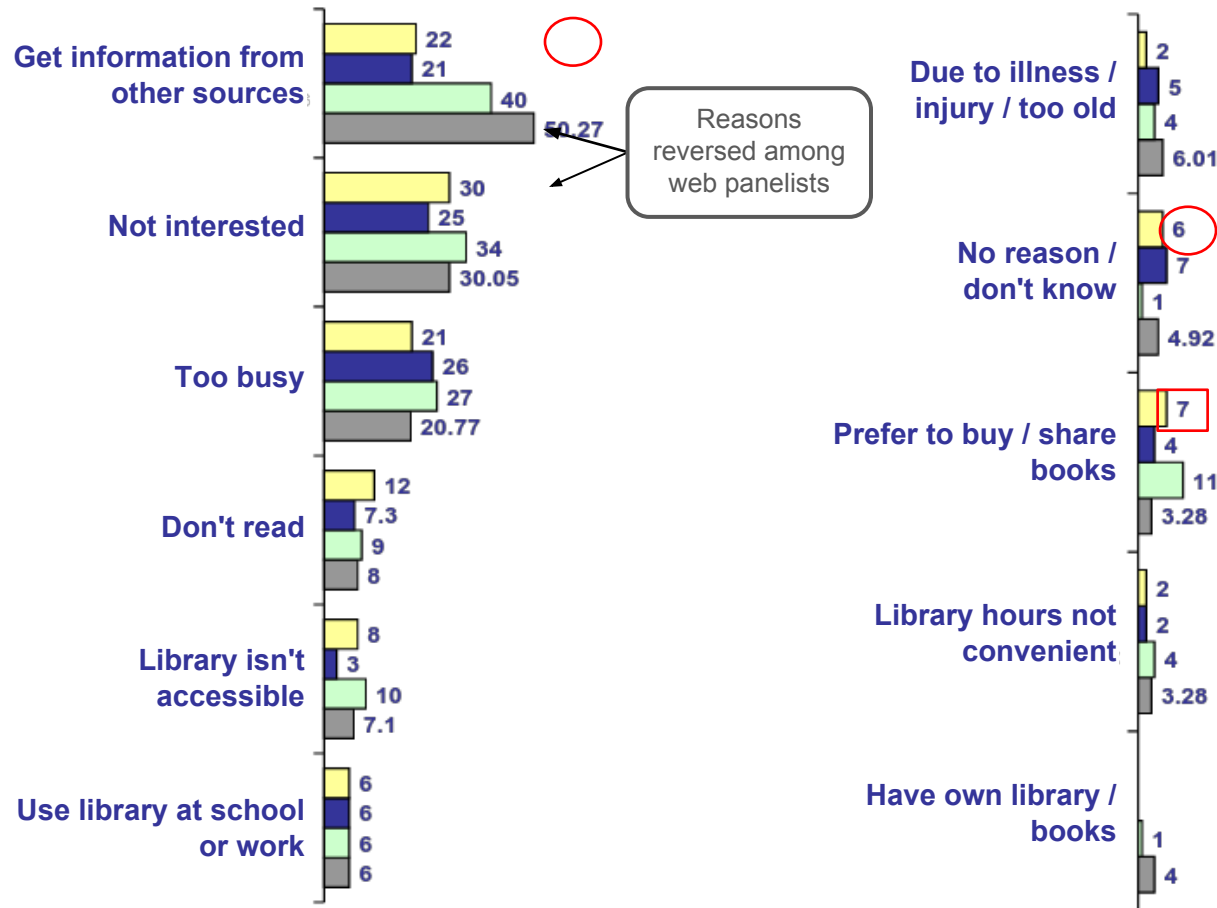


Had a Negative Experience (All users, current and past)



Availability of information from other sources and lack of interest are the two main reasons for not using the public library

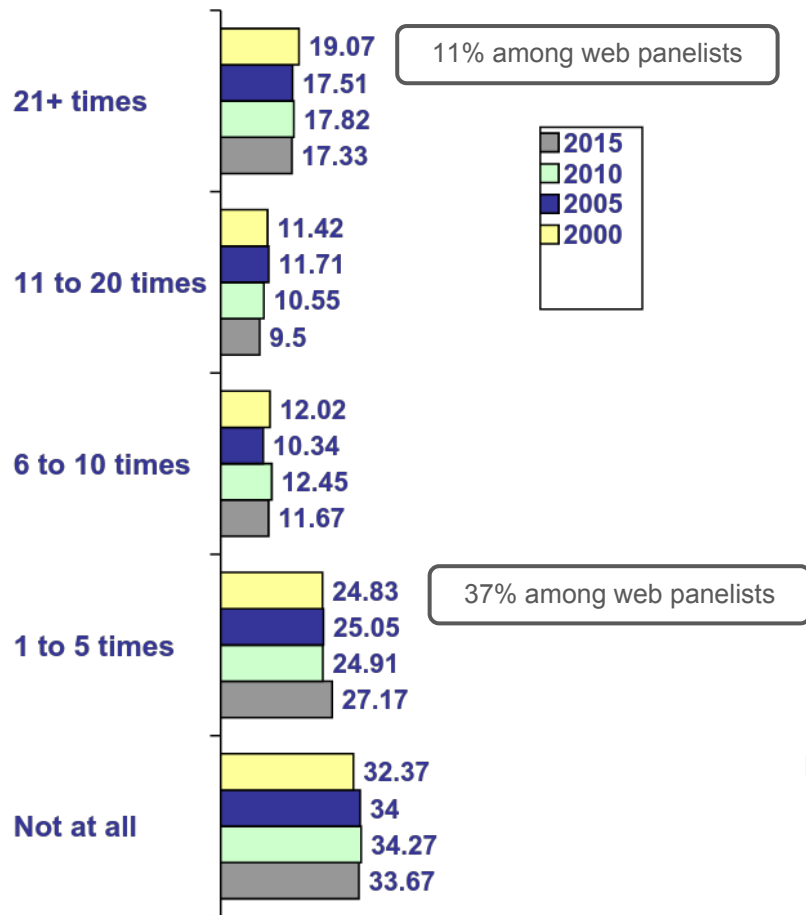
Reasons for Not Using the Public Library



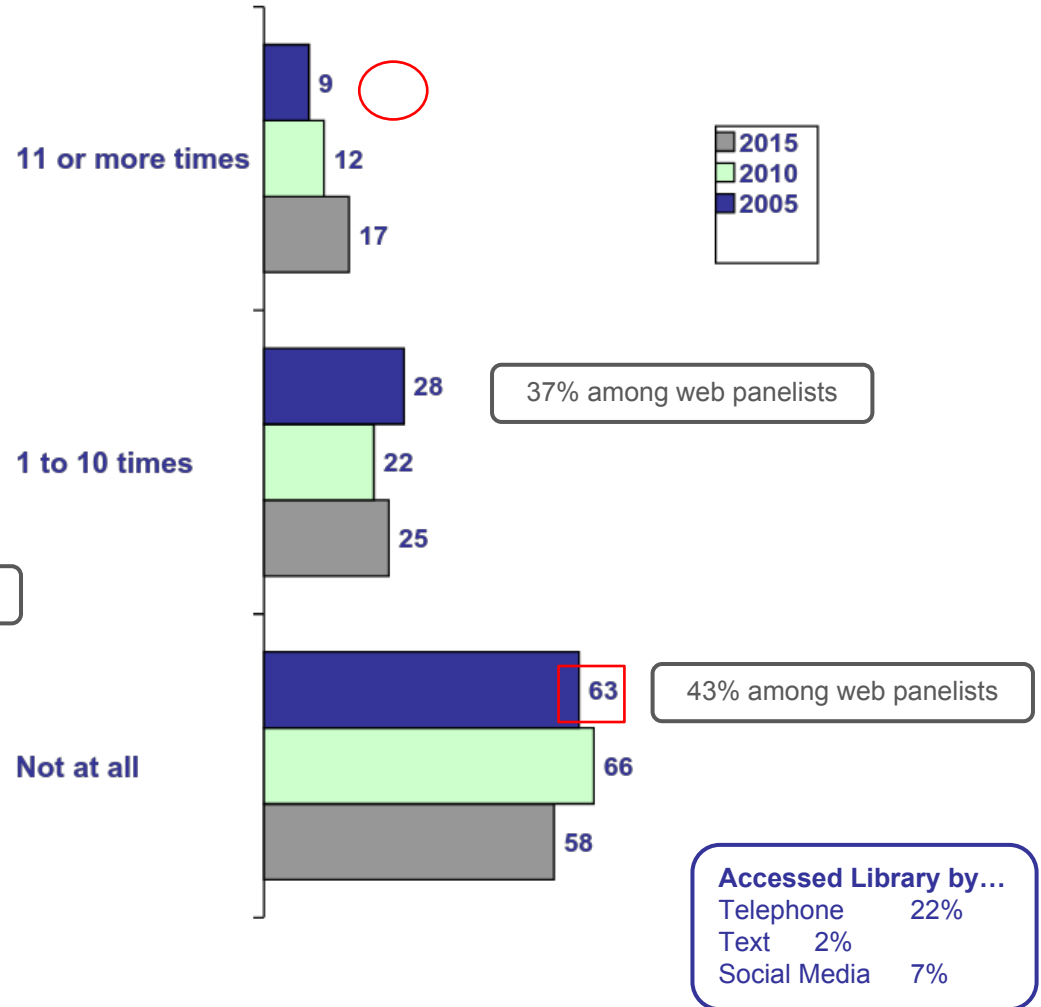
- Higher income earners are more likely to get information from other sources
- Those with lower income are more likely to not be interested

Frequency of visiting the library in person has remained constant, while online access has increased over the last five years

In-Person Library Visit Frequency in Past Year

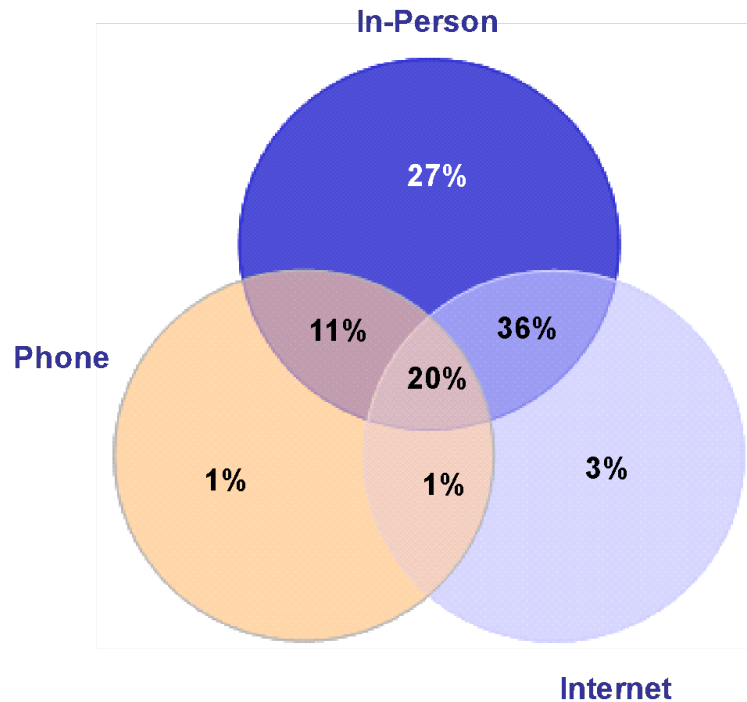


Times Accessed Library's Website in Past Year

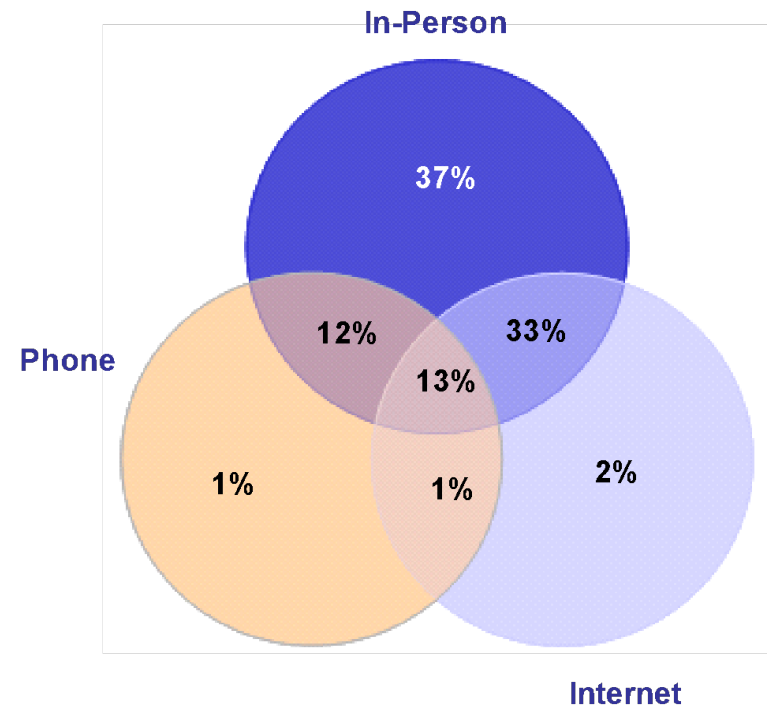


Ways Users Access the Public Library

2015



2010

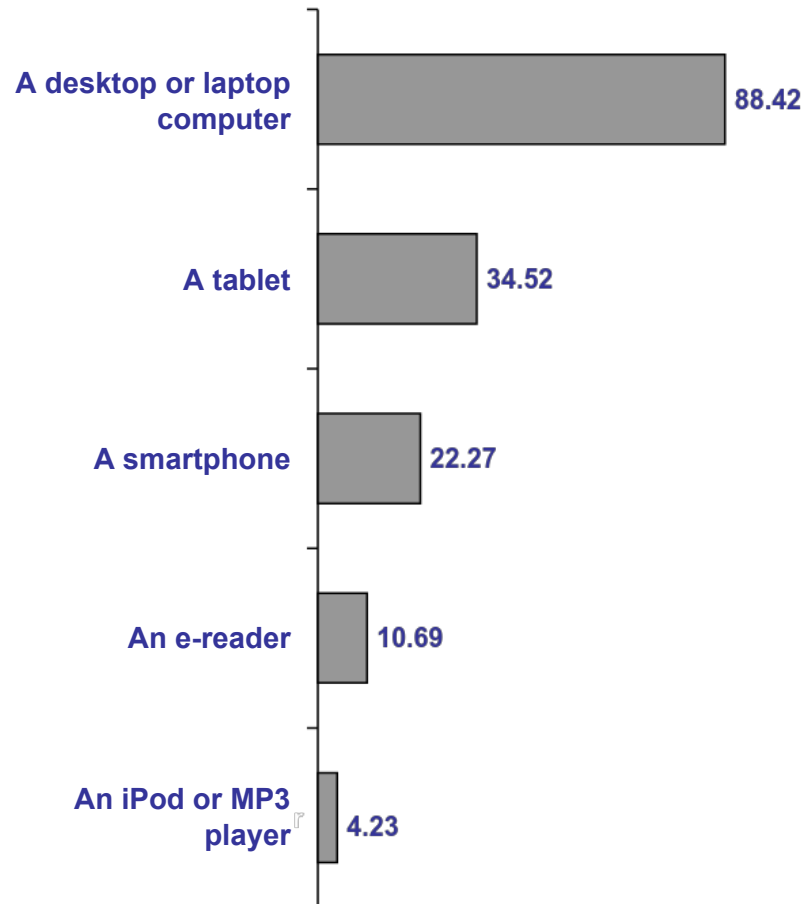


Significant differences among web panelists (2015):

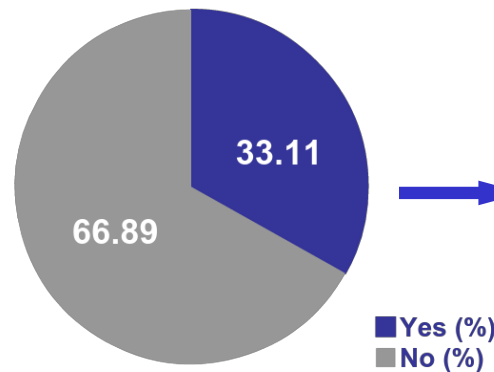
In-person only	19%
In-person / Internet	49%
In-person / phone	3%

E-readers are less popular than other devices for accessing library materials

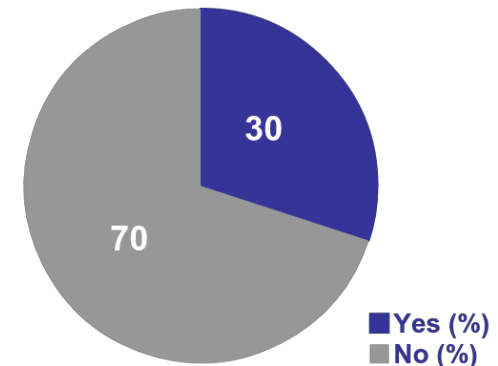
Devices Used to Access Resources from the Library



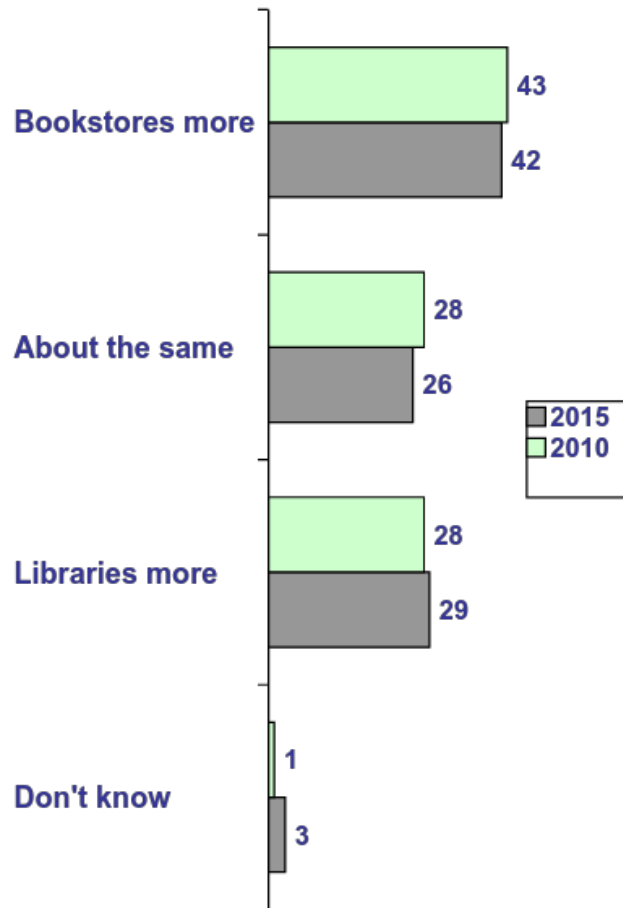
E-reader ownership (among those who have not used an e-reader to access library resources)



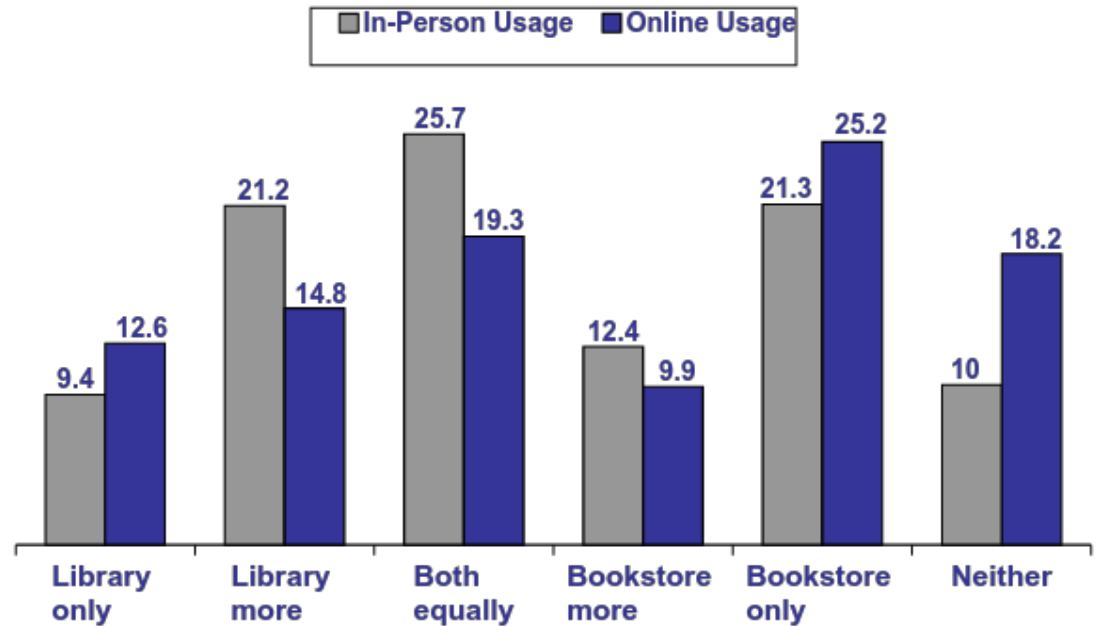
Ever tried to download public library e-books using an e-reader



Bookstore vs. Library Visit Frequency

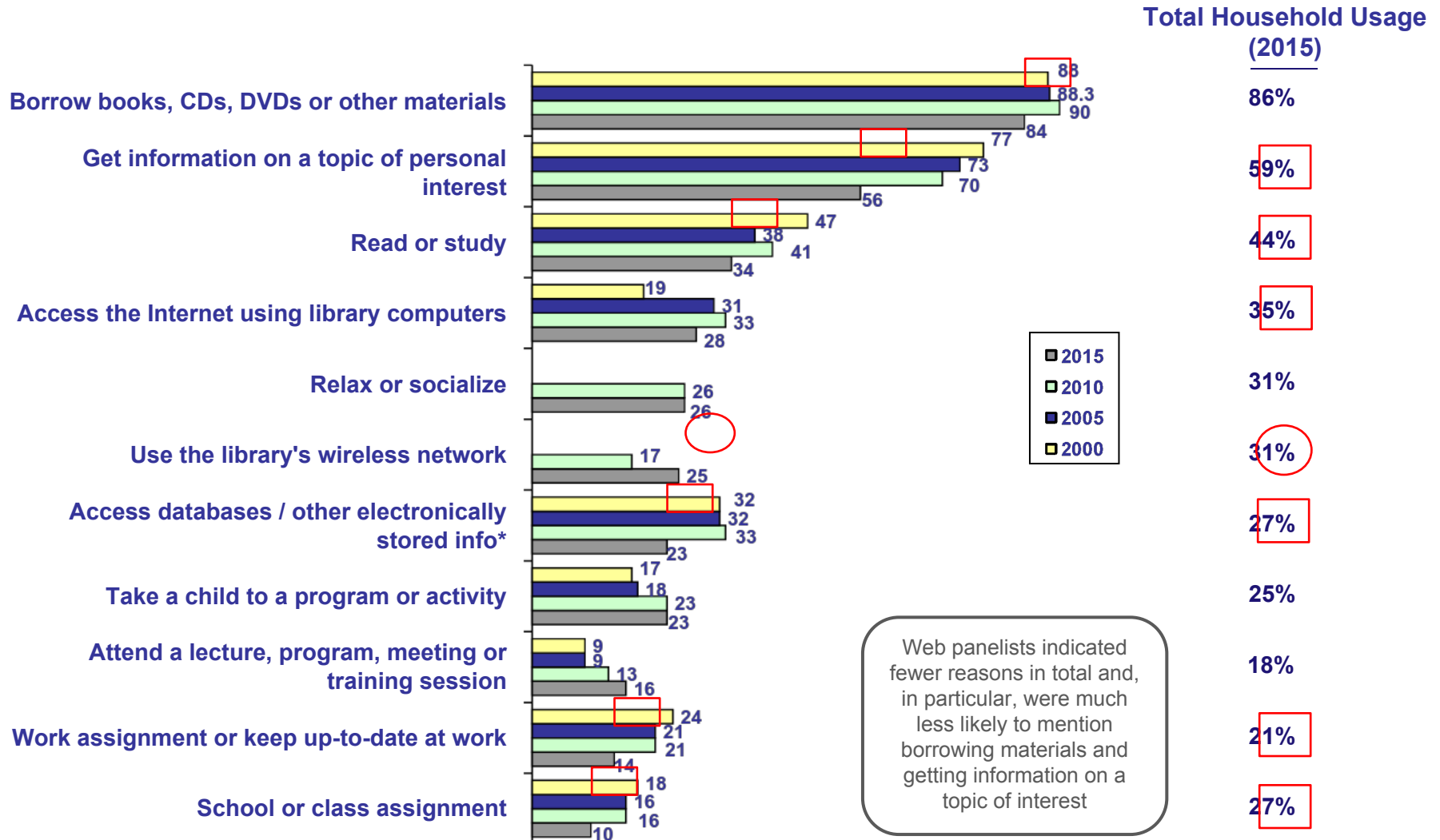


Relative Frequency of Using Libraries and Bookstores



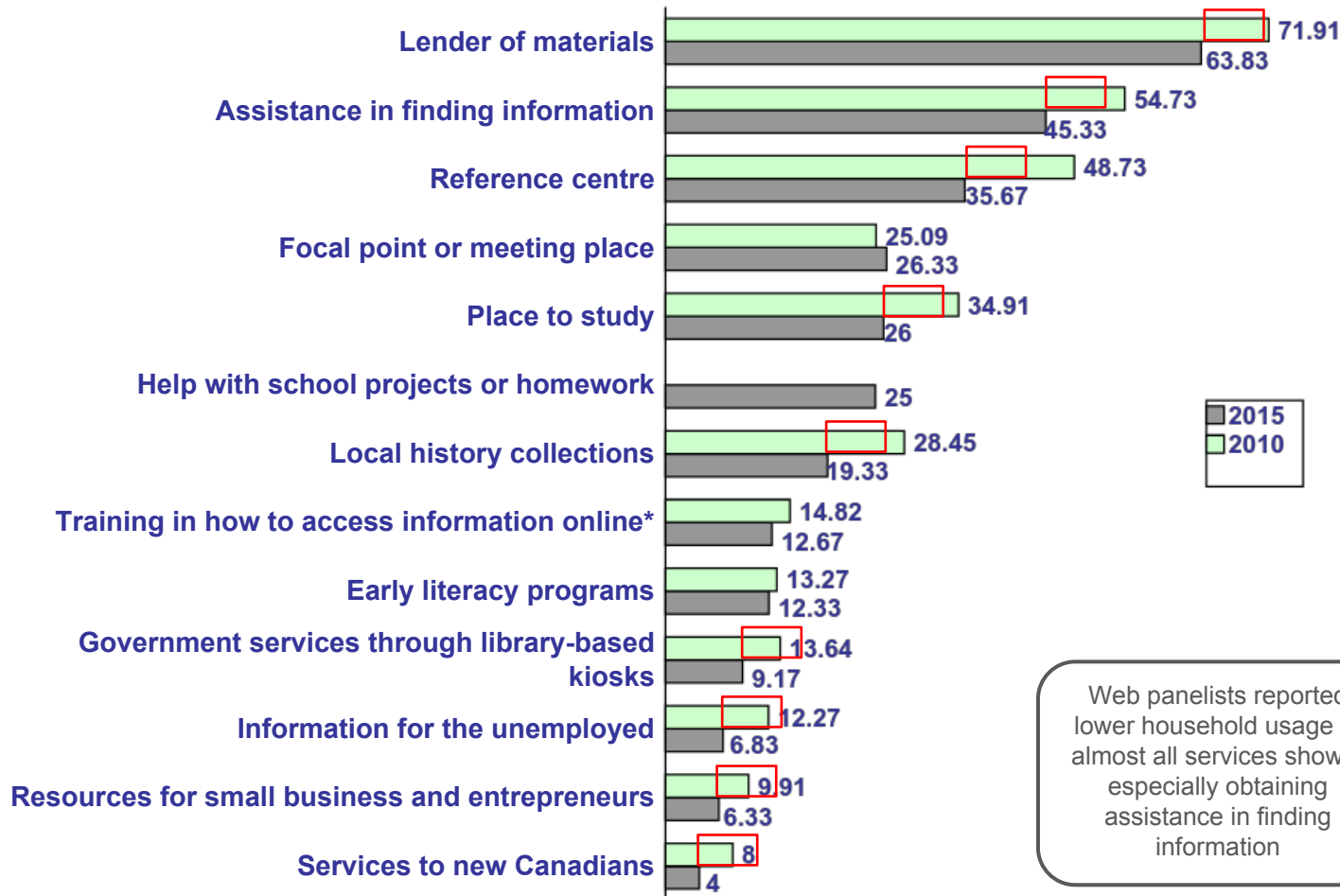
In-person library visitors are engaging in fewer activities, with use of the library's wireless network being the only one to register increased usage

Reasons for Personally Using the Public Library



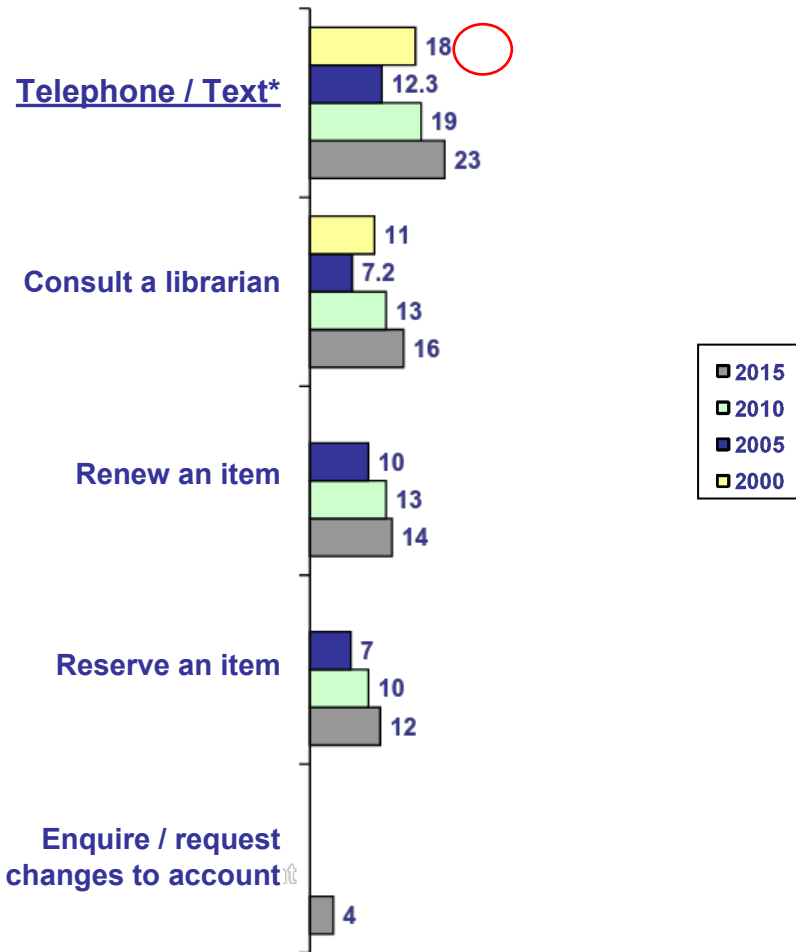
Similarly, at the total respondent level, household usage of nearly all library services has declined since 2010

Past Year Usage of Library Services by Someone in Household

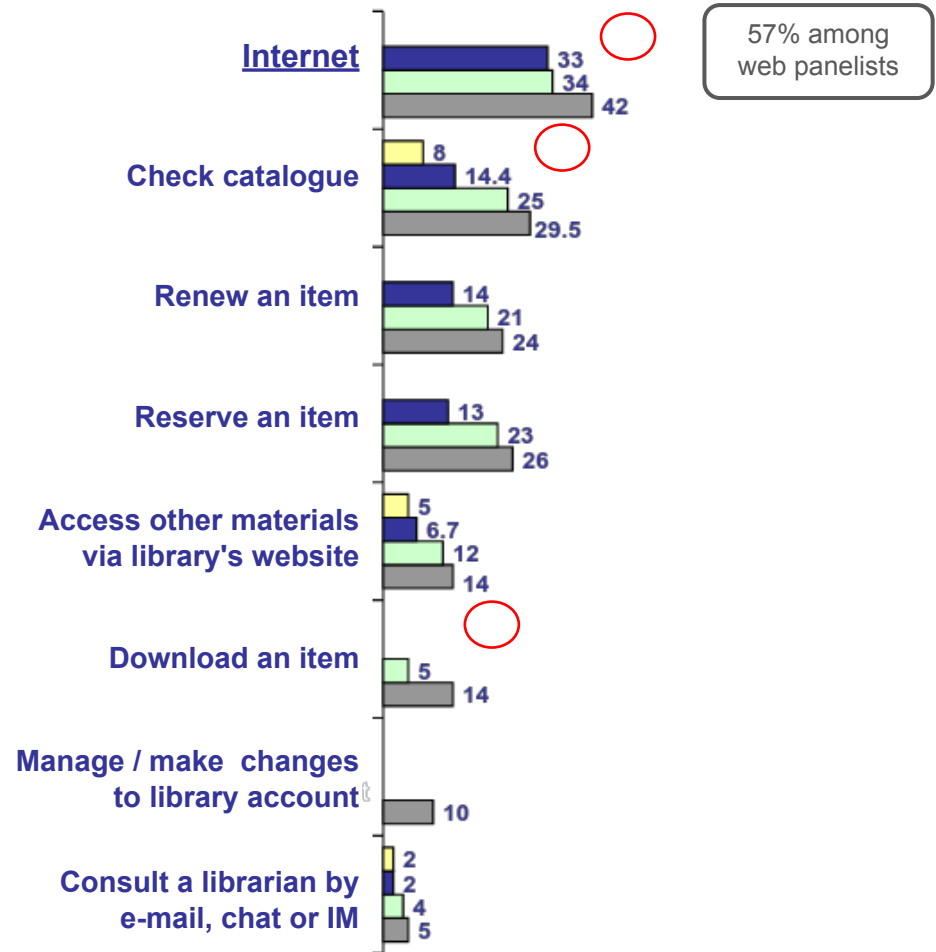


Web panelists reported lower household usage of almost all services shown, especially obtaining assistance in finding information

Past Year Use of Public Library by Telephone / Text

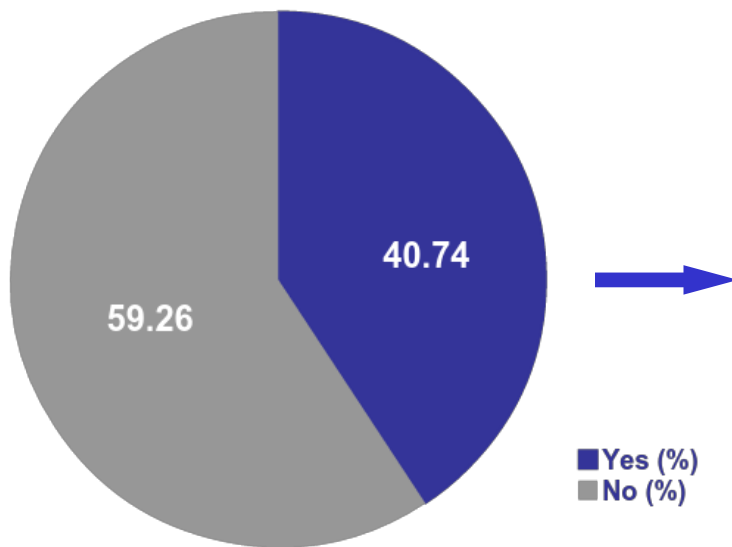


Past Year Use of Public Library by Internet

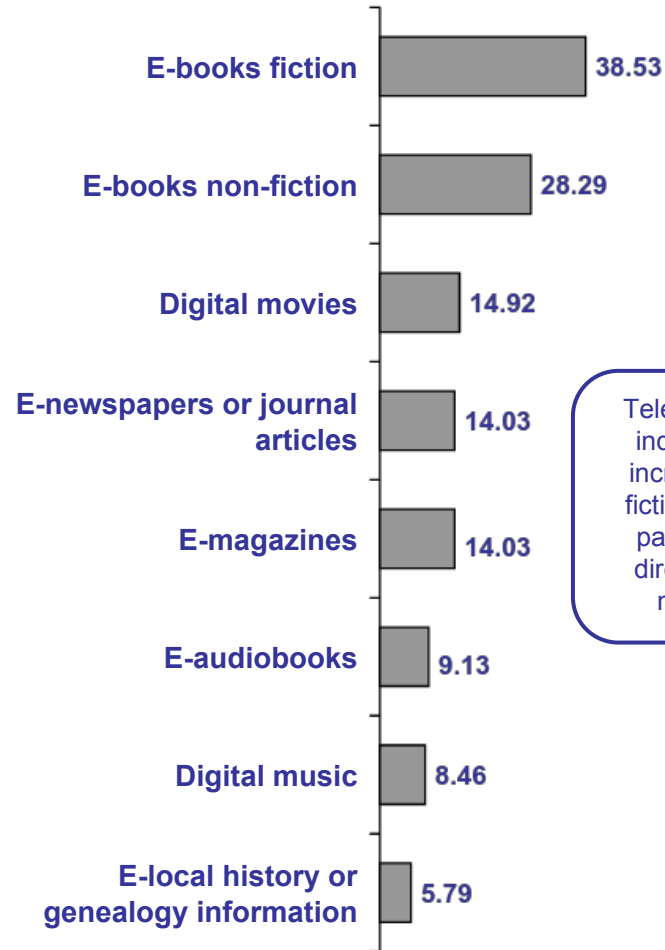


E-books, fiction and non-fiction, are clearly the most widely used electronic resources obtained from the library

Checked the Library's Online Catalogue, Downloaded an Item, or Accessed Other Materials via the Library's Website



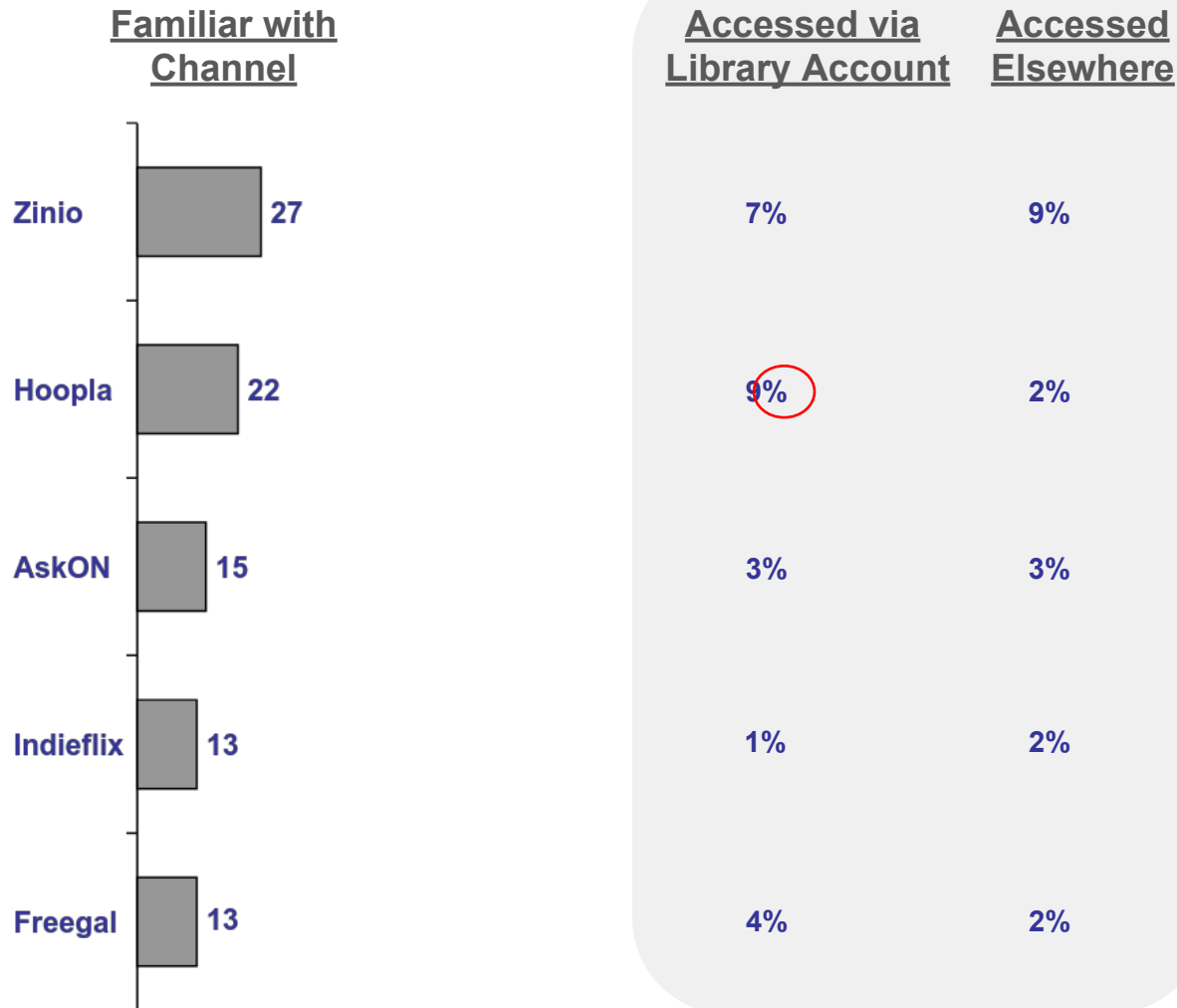
Specific Types of Electronic Resources Used on Library's Website



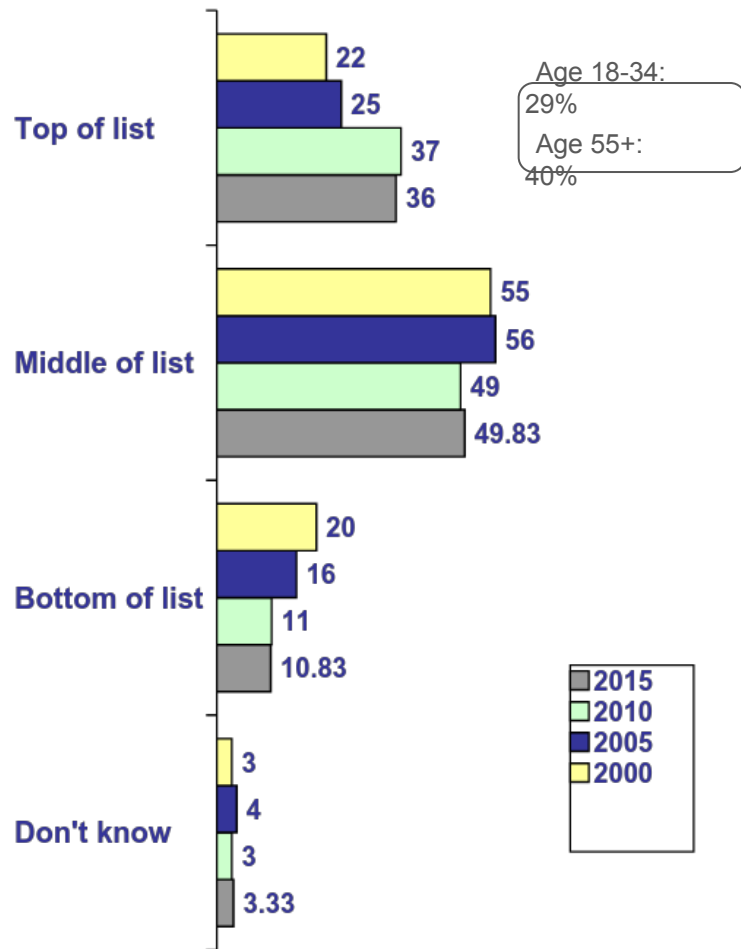
Telephone respondents indicated a significant increase in their use of fiction e-books over the past five years, and a directional increase in non-fiction as well

Relatively few of those who access the library's electronic materials were familiar with the new electronic channels or services some libraries offer

Familiarity and Use of New Electronic Channels

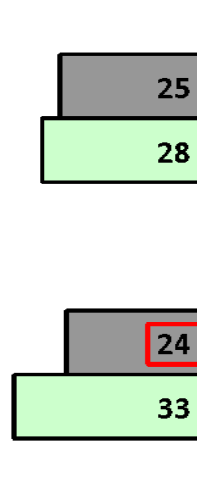


Benefit of Public Libraries Relative to Other Municipal Tax-Supported Services

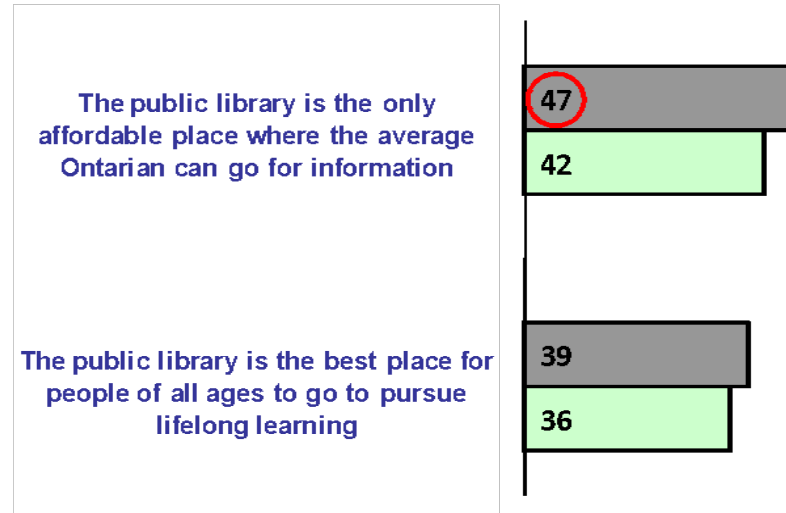


Believability of Positioning Statements

Bottom 6 Ratings
(1-6 on a 10-pt. scale)



Top 2 Ratings
(9-10 on a 10-pt. scale)



Most Ontarians acknowledge the public library's role in advancing literacy, equal opportunity, and quality of life in their communities

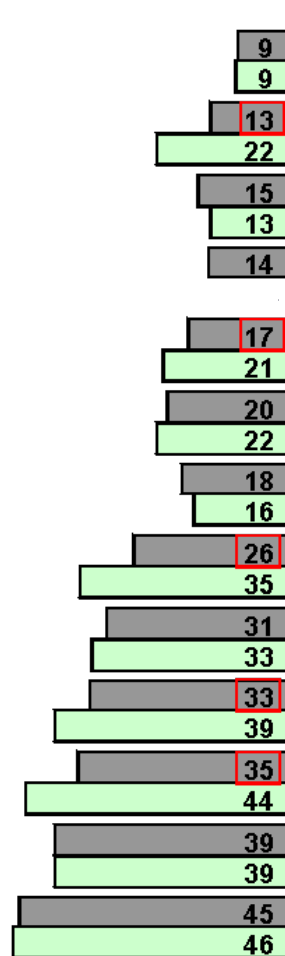
Believability of Positioning Statements



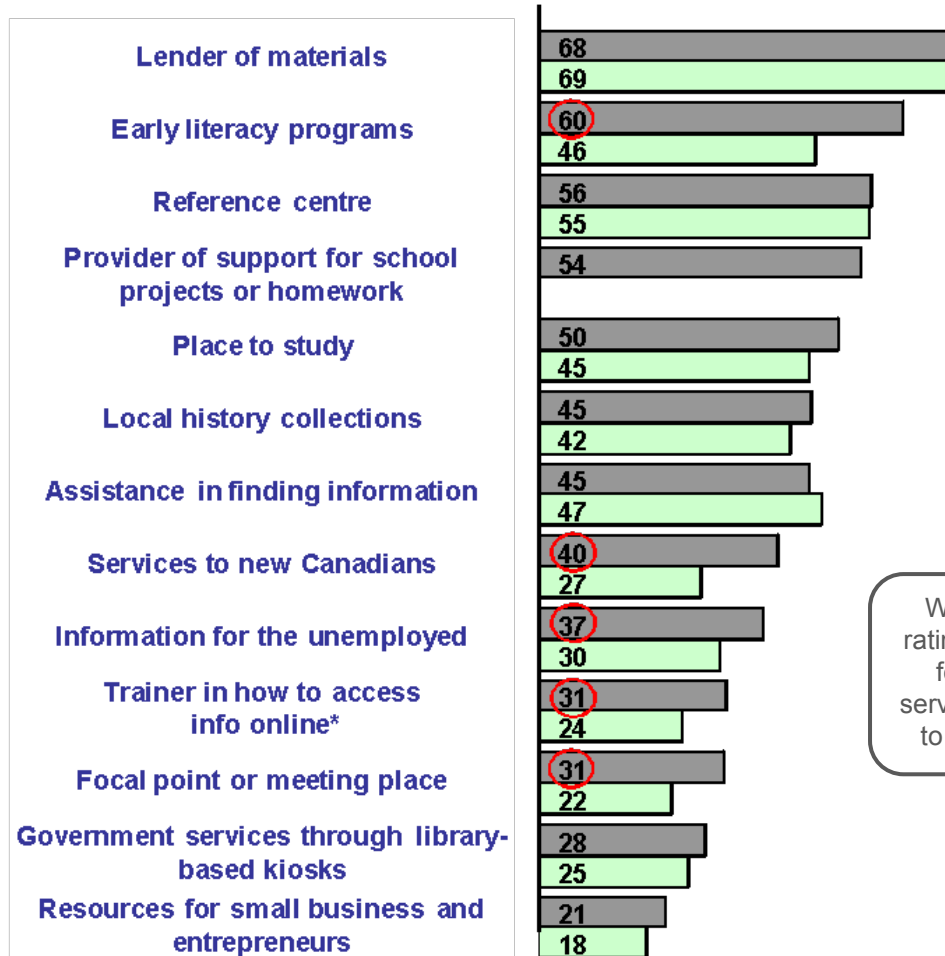
The perceived value of several library services has increased over the past five years

Perceived Value of Library Services

Bottom 6 Ratings
(1-6 on a 10-pt. scale)



Top 2 Ratings
(9-10 on a 10-pt. scale)



■ 2015
■ 2010

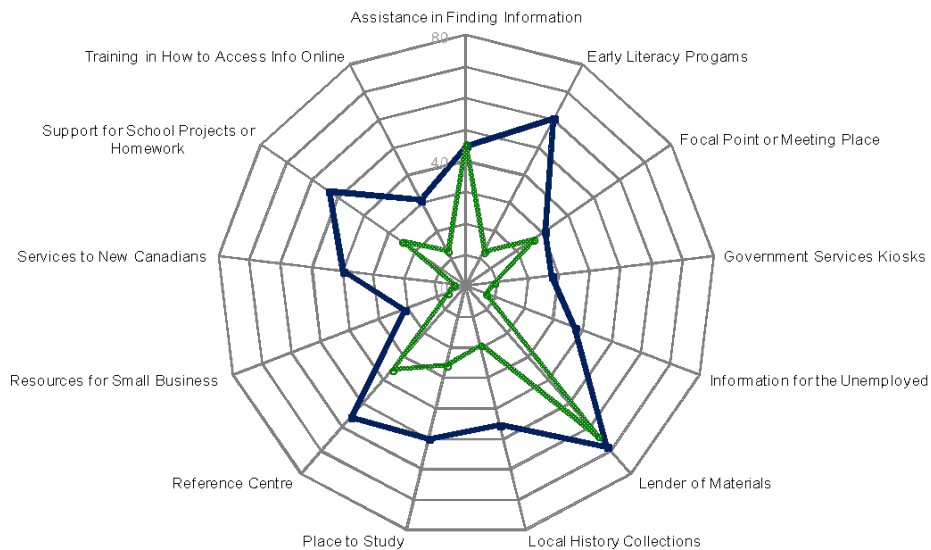
Web panelists' ratings were lower for almost all services, likely due to methodology

There is a bigger gap between web panelists' perceived value and usage of assistance with finding information versus phone respondents

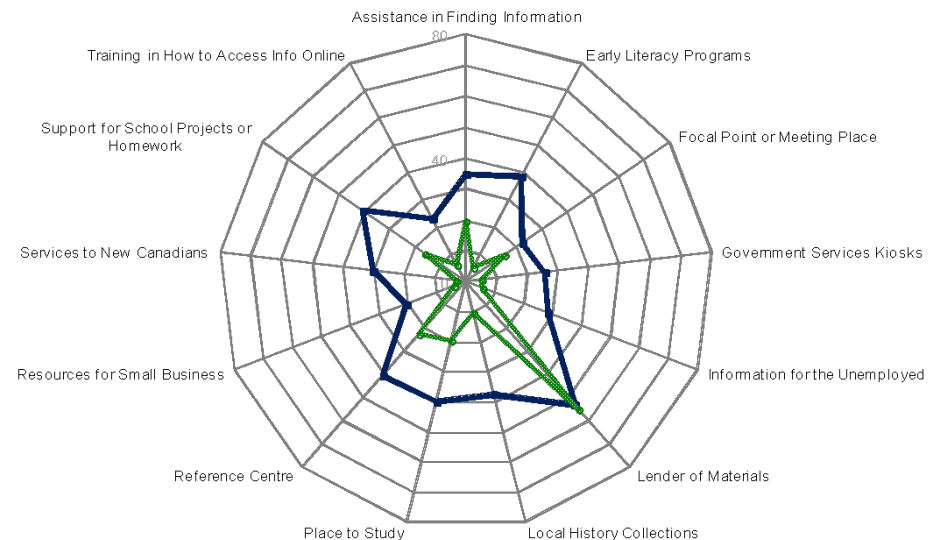
Value & Usage Combined

—■— Percent Valuing the Service —■— Percent Using the Service

Telephone Survey

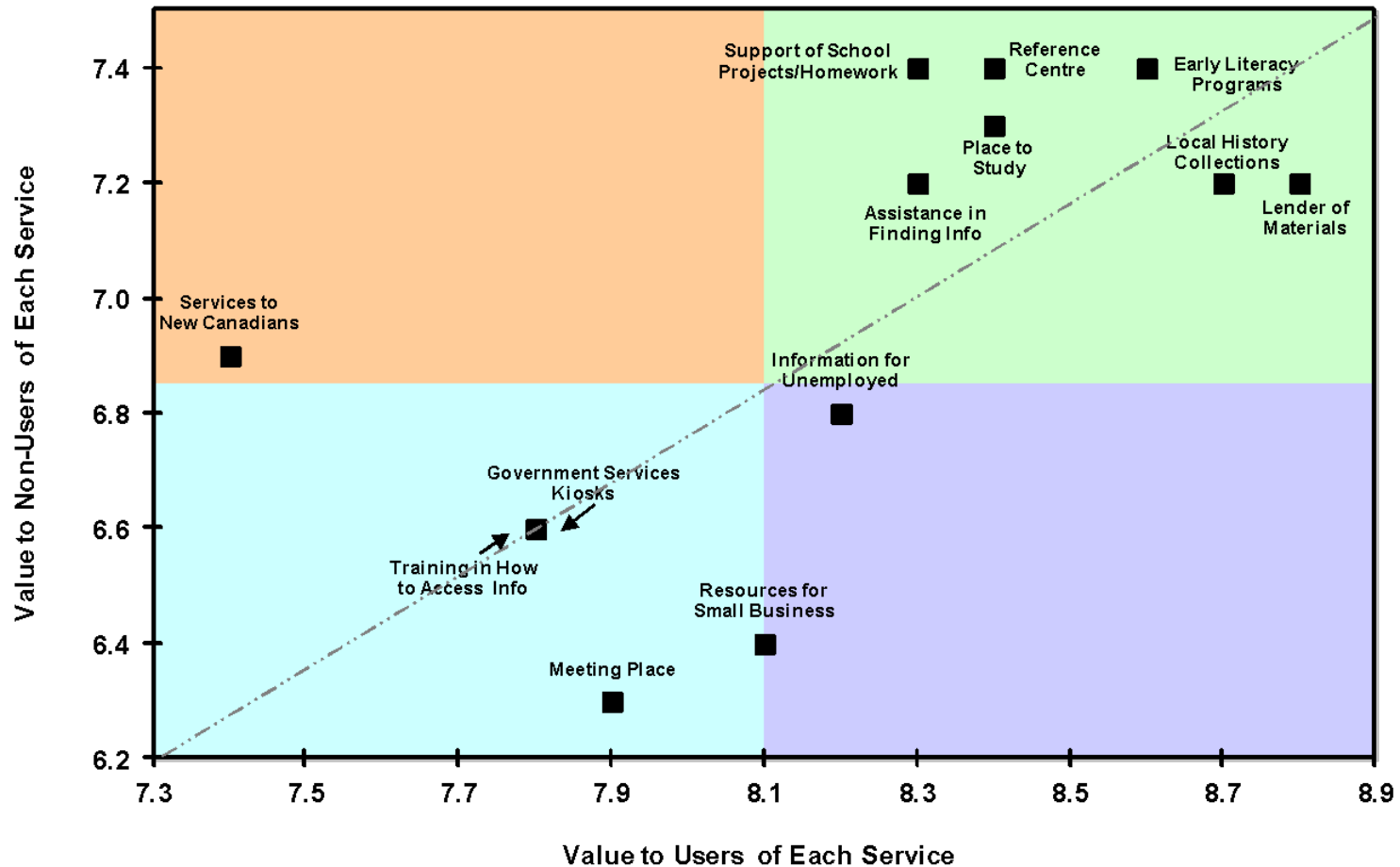


Online Survey



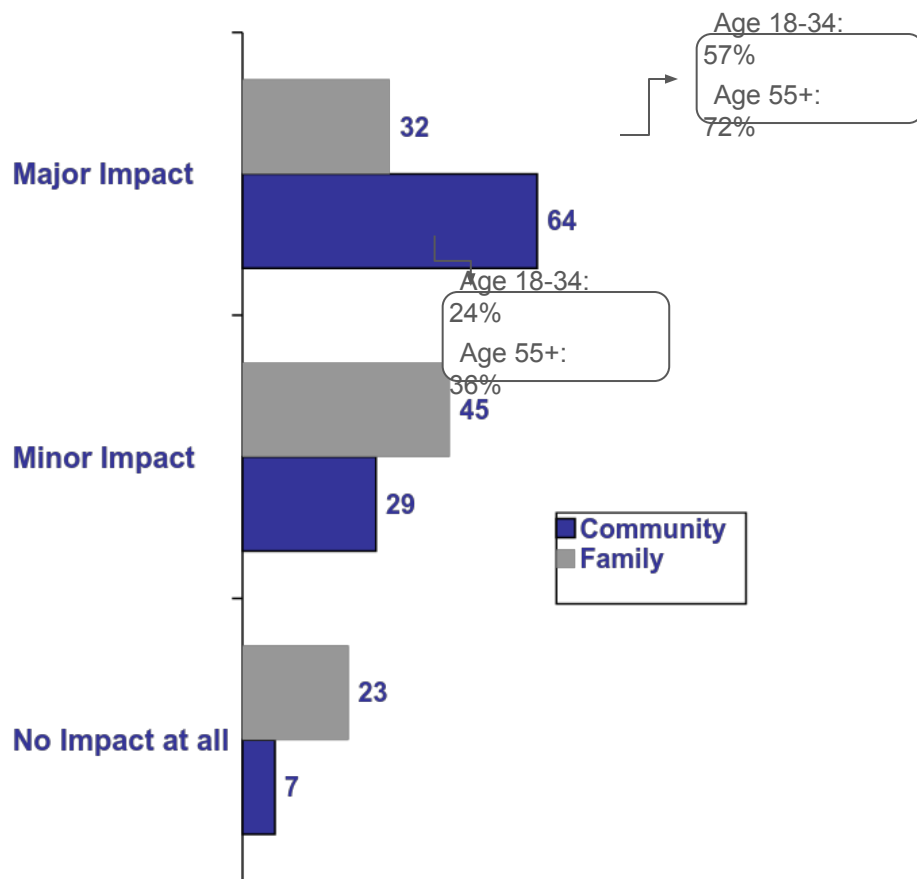
Services to new Canadians and support for school projects / homework are of higher relative value to non-users than users

Relative Value of Services to Users and Non-Users



Most Ontarians feel that, hypothetically, a local library closing would have more impact on the community than on themselves and their families

Impact of Public Library Closing on...



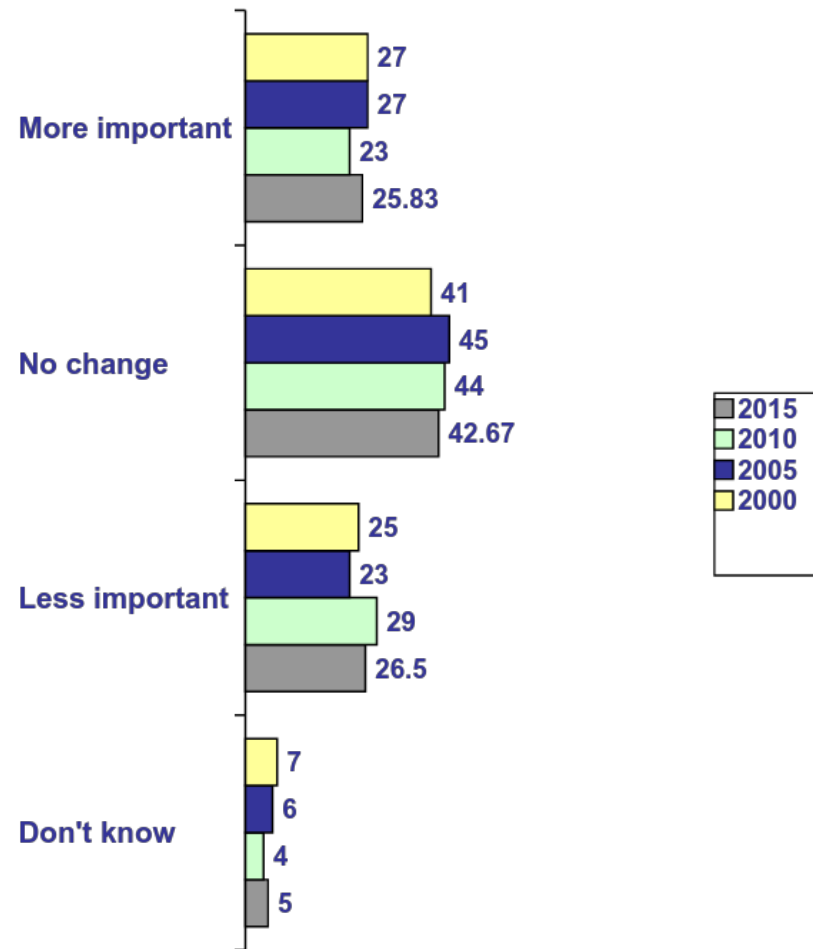
Telephone survey respondents were more likely than web panelists to think there would be major impacts

Family Impact

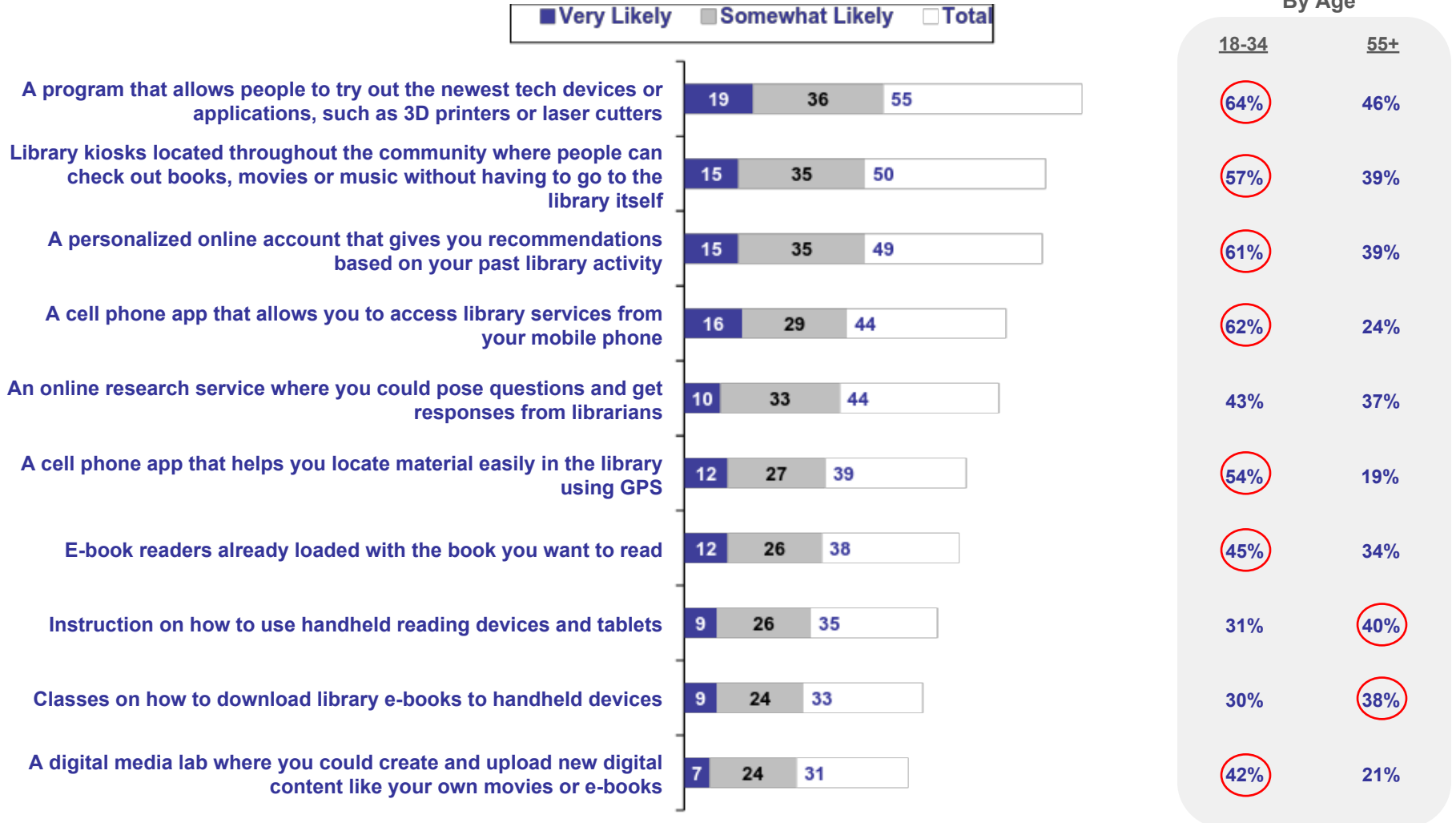
	Major	Minor	None
Major	29%	30%	6%
Minor	3%	15%	11%
None	0%	0%	6%

Views remain mixed as to whether libraries will become more or less important in the future

Opinion of Future Importance of Public Libraries



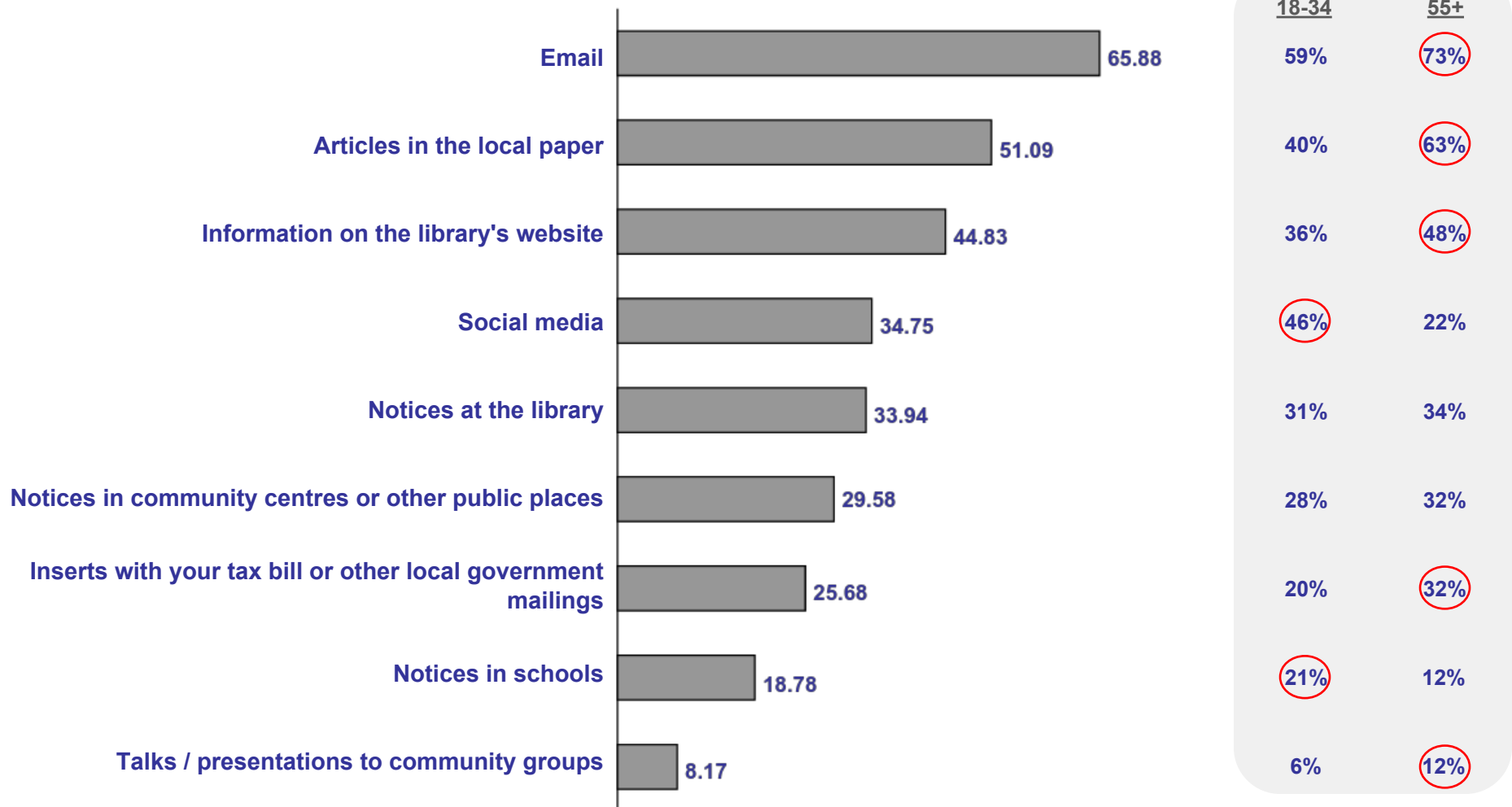
Likelihood of Using Different Library Services



Communication preferences also differ by age, but email does rank highest among all groups

Best Way to Inform about What's Going On at the Library

By Age



- **Overall opinions and value perceptions of the library remain very strong.**
 - Its position in people's minds relative to other tax-supported services is consistent with previous studies, and reactions to earlier positioning statements have improved slightly.
 - The public acknowledges the library's role in advancing literacy, equal opportunity, and quality of life in Ontario communities.
 - The value of certain services (e.g., for young children, new Canadians, and the unemployed) has increased over the past five years.
 - A majority of residents feel if their local library were to close, it would have a major impact on the community (but not necessarily on them personally).
- **Numbers of library users have remained consistent, but usage patterns have changed.**
 - The number of library non-users has been extremely steady over the last 15 years.
 - Library card ownership has increased; still, household usage levels may be softening slightly.
 - Reported in-person library visit frequency has remained the same over the years, but in 2015, the number of people using the library both online and in-person has surpassed the number of in-person-only visitors.
 - Usage of many services is lower than reported previously, indicating that library users may be becoming more selective in choosing which services to use.

- **Regular review of strategies and tactics becomes even more important as technology, channel, and media preferences change.**
 - Electronic access is complementing, not replacing, in-person usage; therefore, duplication of hard copy and electronic materials, plus increased channel costs, will be the norm for the foreseeable future.
 - Ensuring compatibility with an ever expanding array of electronic devices will continue to pose challenges.
- **Communicating about new service offerings will be as important as providing them.**
 - Traditional library services are not increasing in usage or perceived value.
 - Interest in new services is fragmented, meaning trade-offs will need to be made.
 - Communications about new services will have to be geared to the proper segments to create sufficient awareness, interest, and take-up.
 - People's preference for email suggests that creation of contact lists, user groups and advisory panels may be required in order to maintain a dialogue with library users.
- **How the library can best serve a future generation of users remains uncertain.**
 - Older people's respect for the heritage and social contribution of the public library system will not necessarily be passed down to a younger generation.
 - Not every library can afford to be all things to all people; there may be an increasing need to develop centrally and deliver locally.

All future strategies and plans should be designed with the objective of convincing more people that the public library can be of as much value to them personally as they think it is to others.





*The Federation would like to thank the
Ontario Ministry of Tourism and Culture
for the historical data*