



# FEDERATION OF ONTARIO PUBLIC LIBRARIES RESEARCH

Prepared for: Federation of Ontario Public Libraries Research Task Force

November, 2010

Final Report

# EXECUTIVE SUMMARY

- The way people search for and receive information has changed dramatically in the last five years.
  - Internet access has become almost universal, with most households enjoying home access.
  - There is now little age distinction in the use of the Internet as an information source; however, young people do remain the early adopters when it comes to new forms of communication (e.g., social networking).
- To date, these technological changes have had more impact on how people make use of the library than on user fundamentals.
  - The number of library cardholders has remained consistent over the last ten years.
  - Likewise, the volume of in-person visits to the library has not been adversely affected.
  - In fact, more Ontarians are now accessing the library by electronic means as a supplement to their visits (but so far few are utilizing remote access exclusively).
- The public library continues to be highly valued for the role it has always played in the community.
  - More Ontario residents place the library at the top of the list of municipal tax-supported services than at the bottom.
  - Borrowing materials, getting information on a topic of interest, and reading/studying continue to be the main reasons for visiting the library.
  - When asked to rate the value of specific library services, respondents placed the more traditional services very high on the scale.

- Despite these positives, there are indications that the Federation should not be complacent when it comes to the library's future.
  - For the first time since this study was undertaken, there has been a shift in the public's thinking towards the library becoming less important as the availability of online resources increases.
  - Those most optimistic about the library's future are the ones most linked to its past (i.e., seniors and those without Internet access).
- As a first priority, the library should continue to focus its energies on retention and look for new ways to serve the evolving needs of its various user communities.
  - Historically, because of its public service mandate, the library has attracted very diverse groups, including the highly educated who can afford other alternatives, society's marginalized who can't, and the families of both.
  - However, being all things to all people may not be a sustainable strategy in the information age; a segmented approach for communicating with, and serving the needs of, the library's different constituencies will likely be required.
- New messages and increased marketing will likely be needed if the relatively smaller group of non-users is to be attracted to the library in the future.
  - The size and characteristics of the non-user group have not changed over the last ten years.
  - Given their current perceptions of what the library has to offer, a large majority of non-users have indicated that there is nothing the library can do to attract them.
  - Many claim to be getting whatever information they need from other sources and appear to be satisfied, so information-based services may not be the most compelling ones to feature with this group.

- There may be some advantage to promoting the affordability of the library, particularly in recessionary times.
  - Of the two positioning statements tested, the one which focused on affordability held the most appeal.
  - An affordability message would certainly resonate with the library's more economically challenged constituents, and may also appeal to a portion of the non-user population.
- Bookstores are not the threat they once were (or were thought to be).
  - The public's increased use of technology has caused bookstores to face many of the same challenges as libraries.
  - There is evidence that bookstore visits have gradually been declining.
  - Among those who use both outlets, libraries are actually utilized more than bookstores.
- In a world of increasing competition and limited resources, the library will have to strategically consider which niche services it wishes to offer.
  - As competition from private enterprise continues to increase, the library will need to be very good in each of the strategic areas it decides to pursue.
  - Presently, none of the newer or more targeted services the library offers stands out as offering exceptional value to users or the community at large.
  - Lack of awareness may be a contributing factor, therefore the cost and effort in marketing any new services should not be ignored.

- Given its current strengths and feedback from the survey, there are some specific actions the library may wish to take, such as:
  - Reinforcing a family orientation and continuing to develop more family oriented programs;
  - Looking to youth to help develop IT training programs for older people; and
  - Finding new ways to leverage Canada’s multicultural heritage and the appeal the library holds for those whose first language is not English.
- In the design and delivery of new library products and services, user convenience should be considered as a key component of every value proposition.
  - Convenience is the one clear advantage that information access via the Internet holds.
  - Except in those cases where the library is being positioned as a destination (e.g., a meeting place or place to study) offering convenient access will become increasingly important.
- Finally, the Federation should consider whether the library of the future will be designed primarily as a product, a channel or a service.
  - Traditionally, the library has been good at all three and has probably not needed to differentiate among them.
  - Today, rapidly evolving technology has made it increasingly difficult to compete on all fronts; to enhance its value to the public and ensure its ongoing success, the library must determine what it can best offer, and most affordably provide, to the community and the users it serves.

# BACKGROUND AND METHODOLOGY

- This represents the third wave of a study that has been conducted every five years since 2000.
- Consistent with past waves, objectives of this year's study were to:
  - Understand who uses the public library in Ontario and how it is used;
  - Determine what impact increased access to electronic sources has had on the public library, and how Ontario residents think this will affect the library in the future;
  - Assess residents' opinions about the future of the public library;
  - Measure the perceived value and usage of various services the library offers;
  - Demographically profile library users and non-users; and
  - Identify any changes that have occurred since 2000 and 2005.

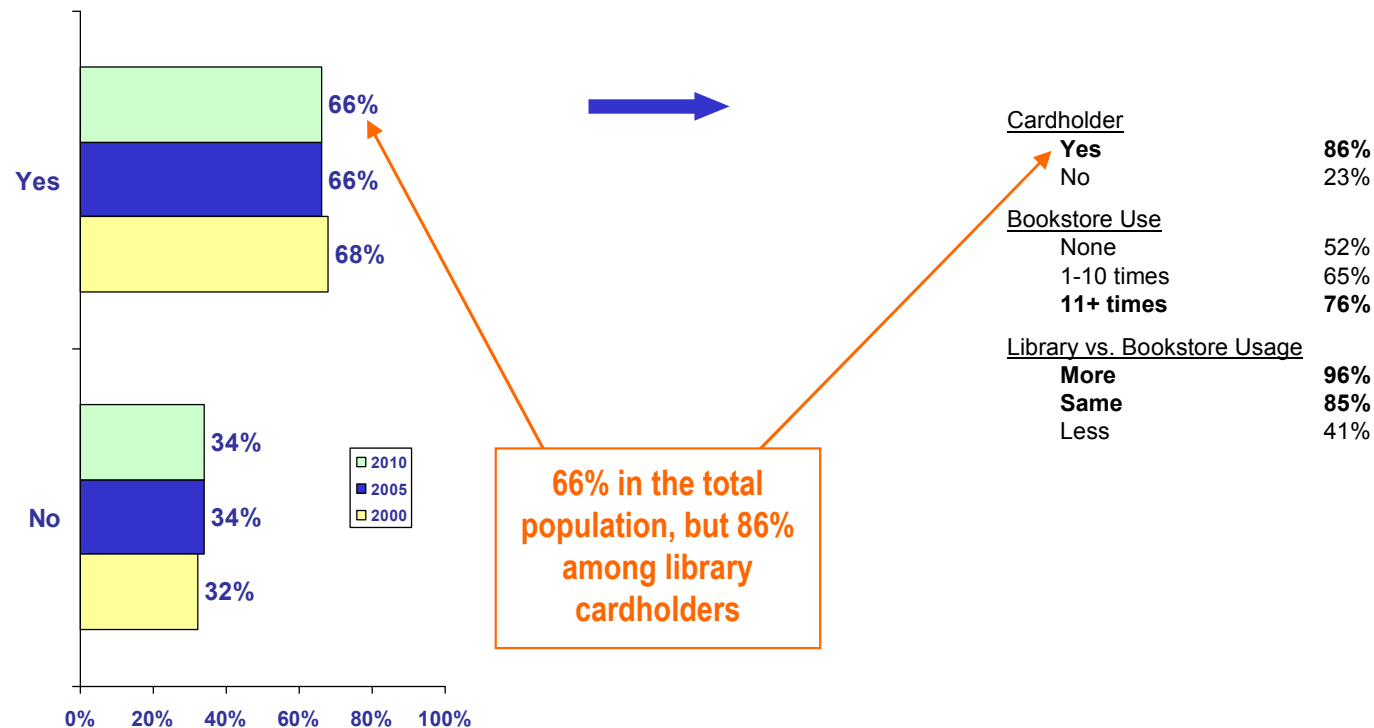


- A total of 1,100 telephone interviews were conducted with Ontario adults in September-October 2010. Sampling was conducted such that all Ontario households with a landline had an equal chance of being called, and was therefore proportional by region. The six Ontario regions are defined by postal code, as follows:

Northern (P)	Metro Toronto (M)
Eastern (K)	GTA Urban (L within GTA)
Southwestern (N)	GTA Ex-urban (L outside GTA)

- Using Statistics Canada population figures, quotas were set by age and gender in 2010; data is therefore unweighted.
- The sample size (1,100) allows inferences to be made about the total Ontario adult population with a margin of error of  $\pm 3.0\%$ , at a 95% confidence level.
- Throughout most of the study period, only an English script was available. French-speaking respondents were offered a callback, but none opted to wait for the French script. A small number of respondents who speak other languages were excluded (approximately 4% of households contacted).
- Market Probe purchased a representative sample of Ontario phone numbers. While there is no way to confirm that there was participation in the survey by First Nations respondents, we have verified that the completion rate in the areas which include First Nations Libraries was higher than the survey average.

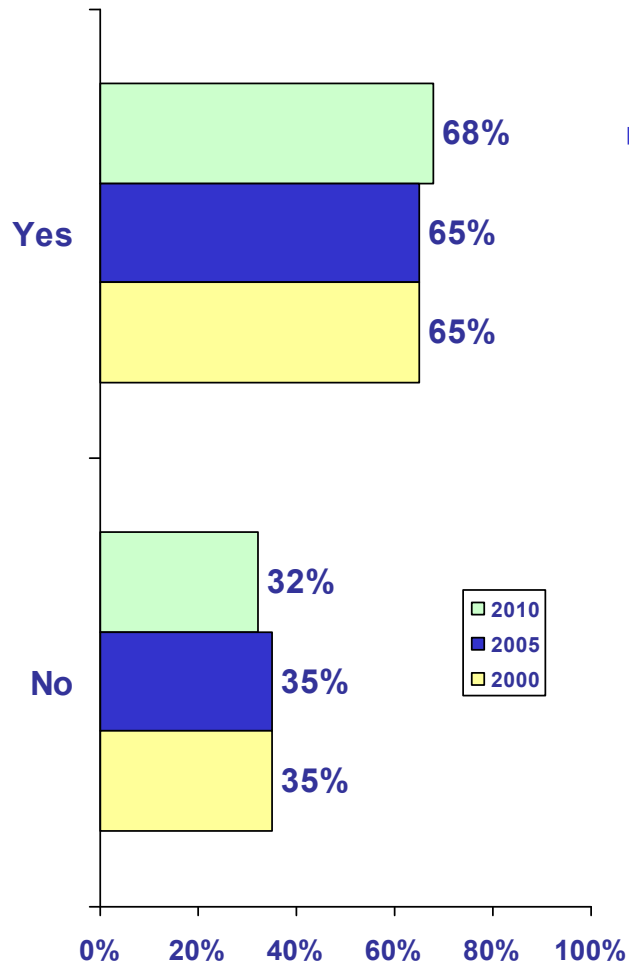
- Many of the charts contain profiling information for a key variable, which is indicated by a blue arrow pointing away from it toward a sidebar. In the chart below, the key variable is the percentage of respondents who said they used the public library in the past year (66%). The sidebar shows the same statistic within specific groups. For example, the first category break in the sidebar shows that the percentage who have visited the library among those who are cardholders is 86%, while among non-cardholders it is 23%.



- Throughout the report, a red circle ○ or square □ indicates that a 2010 observation is significantly higher or lower than the previous survey. **Bold text** within sidebars indicates that, for 2010, the bolded subgroups' results are significantly higher than one or more of the non-bolded groups' results.

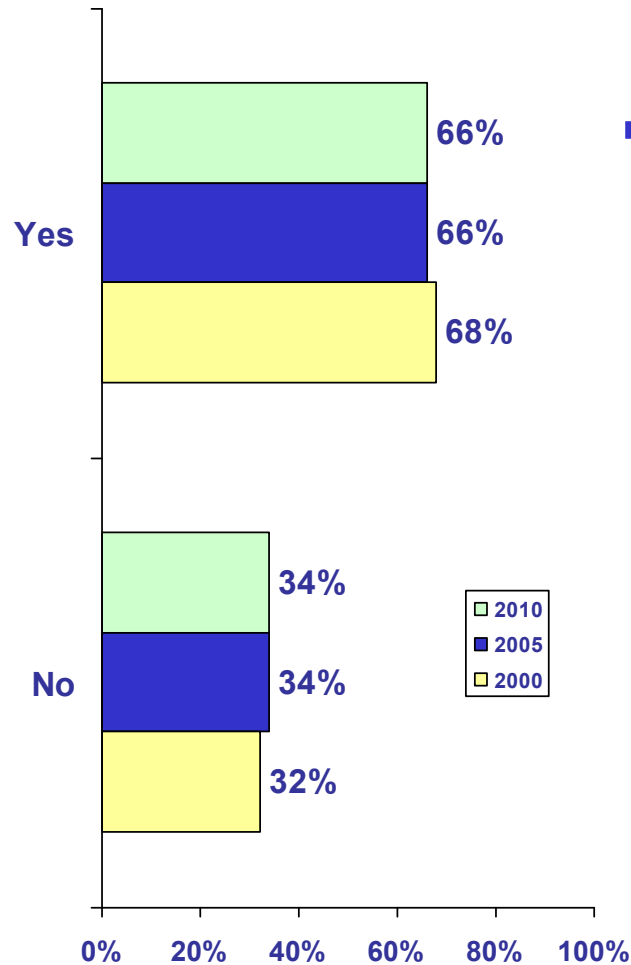
# USE OF THE PUBLIC LIBRARY

- Over the last ten years, there has been little change in the number of library cardholders.
- Cardholders tend to live in Ontario's larger communities and to have completed higher levels of formal education.
- Encouragingly, three-quarters of the 18-24 age group claim to be library cardholders.



<u>In-Person Library Use</u>		<u>Library Benefits</u>	
None	28%	<b>Top</b>	<b>80%</b>
<b>1-10 times</b>	<b>83%</b>	<b>Middle</b>	<b>65%</b>
<b>11+ times</b>	<b>96%</b>	Bottom	50%
<u>Bookstore Use</u>		<u>Children in Home</u>	
None	53%	<b>Yes</b>	<b>73%</b>
<b>Any</b>	<b>71%</b>	No	65%
<u>Gender</u>		<u>Education</u>	
Male	63%	High school	54%
<b>Female</b>	<b>72%</b>	<b>Univ/college</b>	<b>71%</b>
<u>Age</u>		<b>Grad school</b>	<b>81%</b>
<b>18-24</b>	<b>76%</b>	<u>Language</u>	
25-34	68%	English	67%
<b>35-54</b>	<b>70%</b>	French	66%
55+	62%	<b>Other</b>	<b>80%</b>
<u>Access Library by Phone</u>		<u>Community Size</u>	
<b>Yes</b>	<b>93%</b>	<30K	60%
No	62%	<b>30K &lt; 500K</b>	<b>69%</b>
<u>Access Library by Internet</u>		<b>500K+</b>	<b>71%</b>
<b>Yes</b>	<b>90%</b>	<u>Region</u>	
No	57%	North	59%
<u>Future Importance of Library</u>		East	65%
<b>More</b>	<b>74%</b>	Southwest	68%
<b>Same</b>	<b>71%</b>	<b>Metro T.O.</b>	<b>73%</b>
Less	60%	GTA Urban	69%
		GTA Ex-urban	69%

- As was the case in 2005, two-thirds of Ontarians report visiting the library in person within the last year.
- Despite the higher levels of education library users possess, no significant differences by income are observed between users and non-users. This is perhaps due to the fact that library use tends to be higher among women and younger people, who typically tend to have lower incomes.

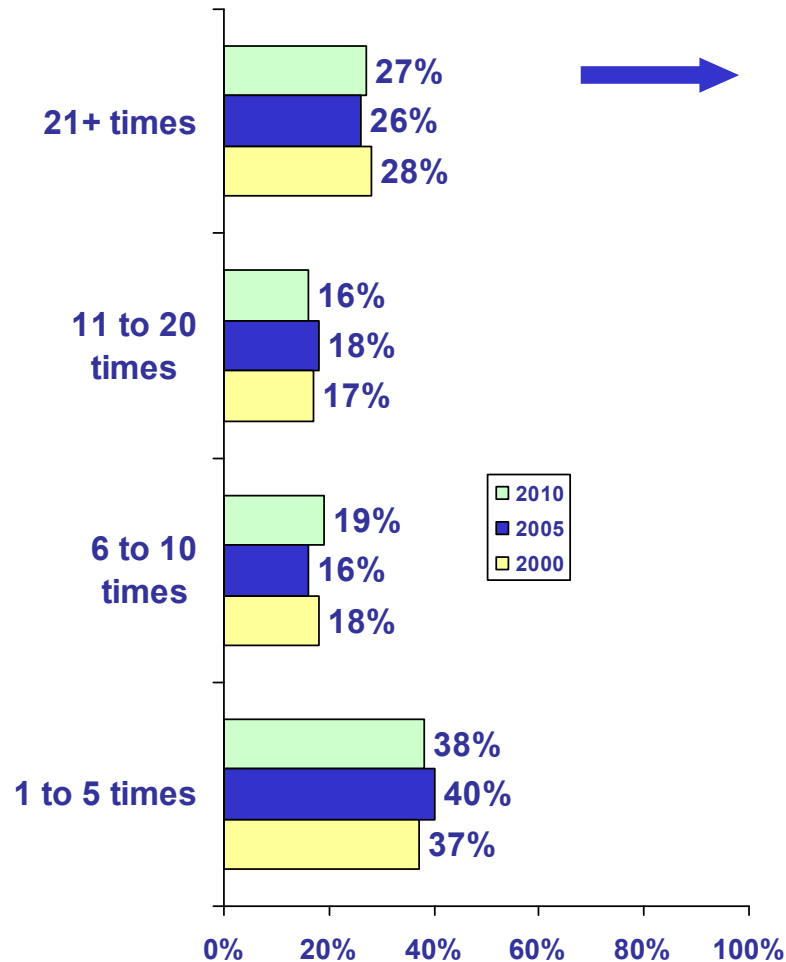


<u>Cardholder</u>			<u>Gender</u>	
<b>Yes</b>	<b>86%</b>		Male	62%
No	23%		<b>Female</b>	<b>69%</b>
<u>Bookstore Use</u>			<u>Age</u>	
None	52%		<b>18-24</b>	<b>73%</b>
1-10 times	65%		<b>25-34</b>	<b>70%</b>
<b>11+ times</b>	<b>76%</b>		<b>35-54</b>	<b>67%</b>
			55+	60%
<u>Library vs. Bookstore Usage</u>			<u>Children in Home</u>	
<b>More</b>	<b>96%</b>		<b>Yes</b>	<b>71%</b>
<b>Same</b>	<b>85%</b>		No	62%
Less	41%			
<u>Future Importance of Library</u>			<u>Education</u>	
<b>More</b>	<b>72%</b>		High school	55%
<b>Same</b>	<b>71%</b>		<b>Univ/college</b>	<b>68%</b>
Less	54%		<b>Grad school</b>	<b>75%</b>
<u>Library Benefits</u>			<u>Income*</u>	
<b>Top</b>	<b>79%</b>		<\$35K	69%
<b>Middle</b>	<b>62%</b>		\$35K < \$75K	66%
Bottom	43%		\$75K+	65%

Q.2  
 Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100).  
 \* Notable for lack of difference.

# Past Year Public Library In-Person Visit Frequency

- Even though remote access capabilities have advanced greatly over the last ten years, frequency of visiting the library in person appears to have remained unchanged. In fact, those who access the library by electronic means are also more apt to report having made a greater number of in-person visits.
- While incidence of visiting the library in person was shown to vary according to gender and age, reported frequency of visits generally does not exhibit these same skews.



### Access Library by Phone

Yes	35%
No	22%

### Access Library by Internet

Yes	32%
No	20%

### Gender\*

Male	30%
Female	25%

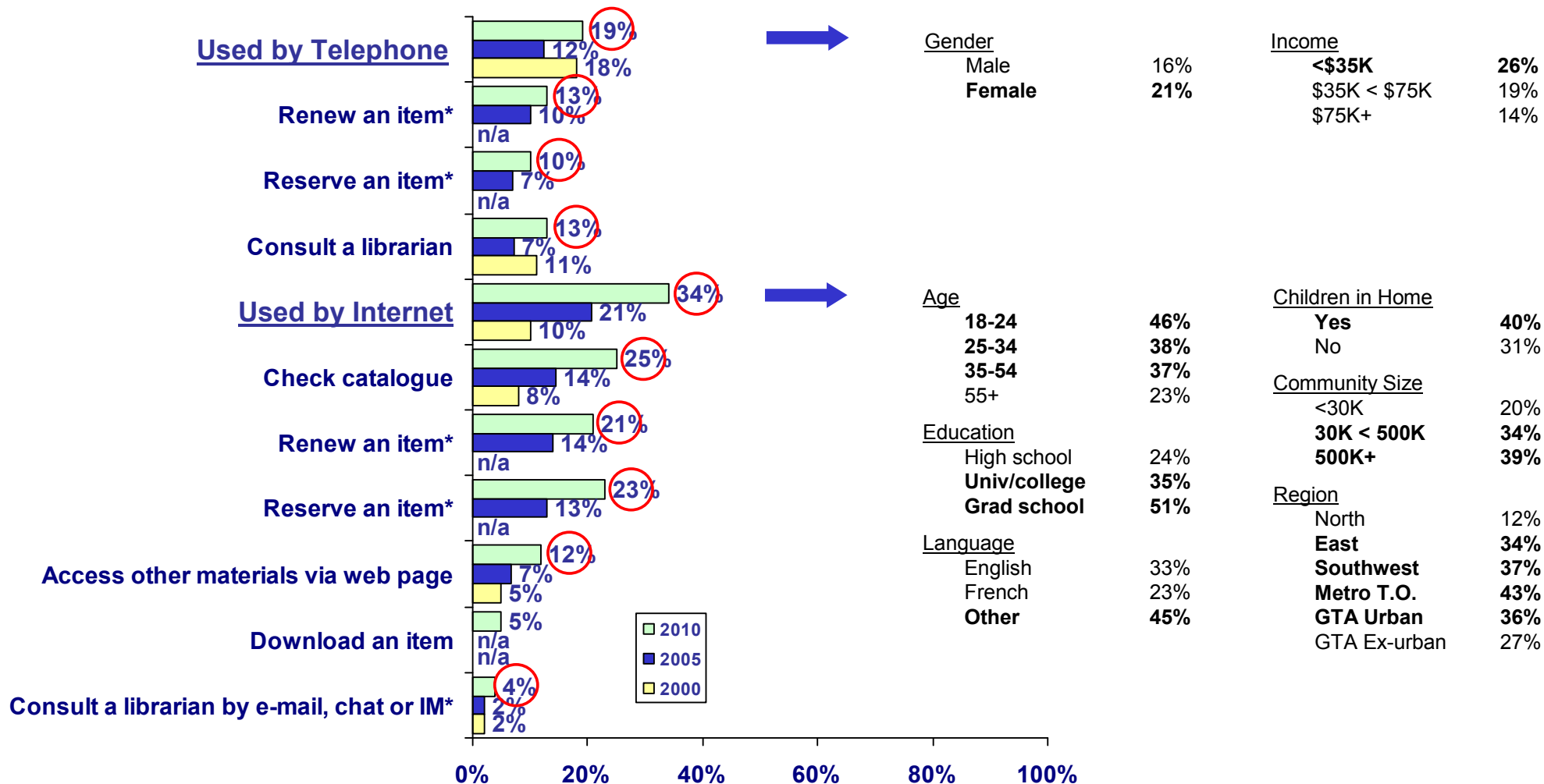
### Age\*

18-24	26%
25-34	27%
35-54	27%
55+	28%

Q.2  
 Base: Past year public library users (2000 - 678; 2005 - 712; 2010 - 723).  
 \* Notable for lack of difference.

# Past Year Use of Public Library by Telephone or Internet

- Remote use of the public library, by both telephone and Internet, has increased significantly from 2005 levels.
- This trend is likely to continue, since higher usage of electronic access channels is associated with the younger and more educated parts of the population.



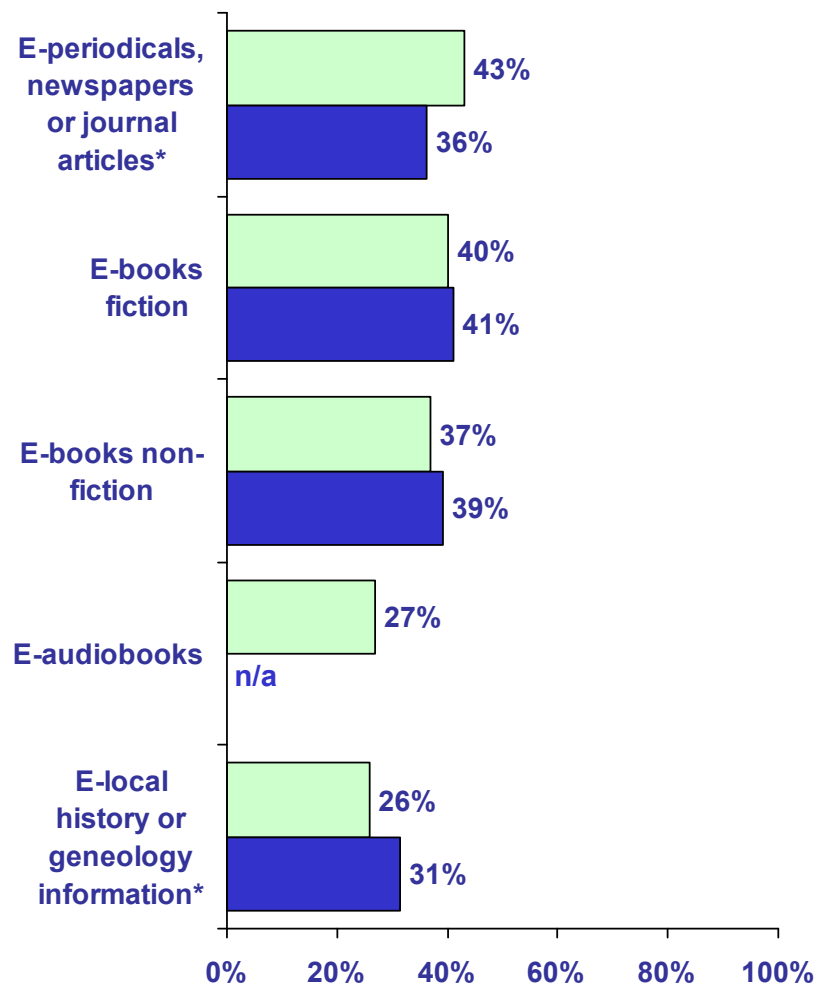
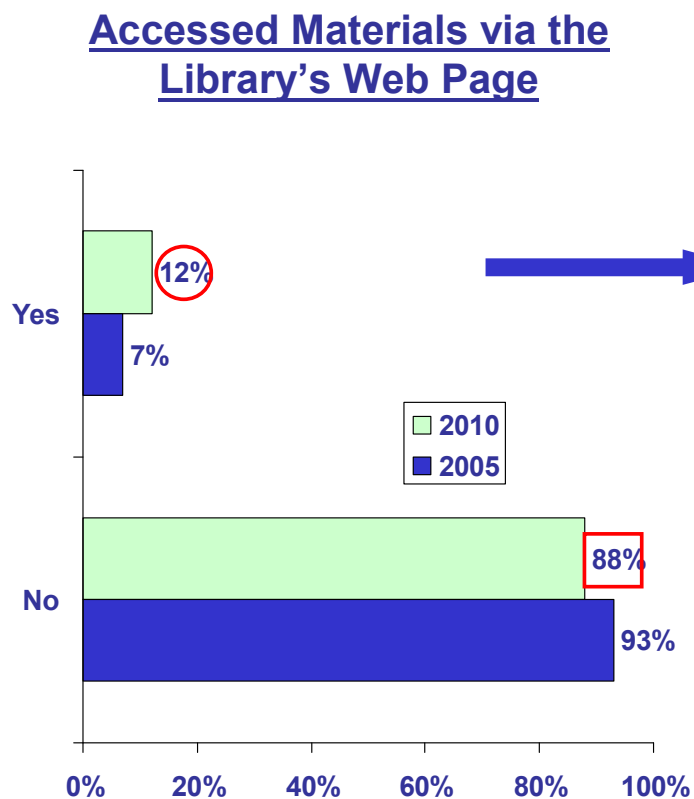
Q.3/4/7/8a

Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100).

\* Wording changed in 2010.

# Specific Types of Electronic Resources Used on Library's Web Page

- While more library users claim to be accessing materials via the library's web page, there has been no significant shift in the types of materials being accessed this way.



Q.8a/b

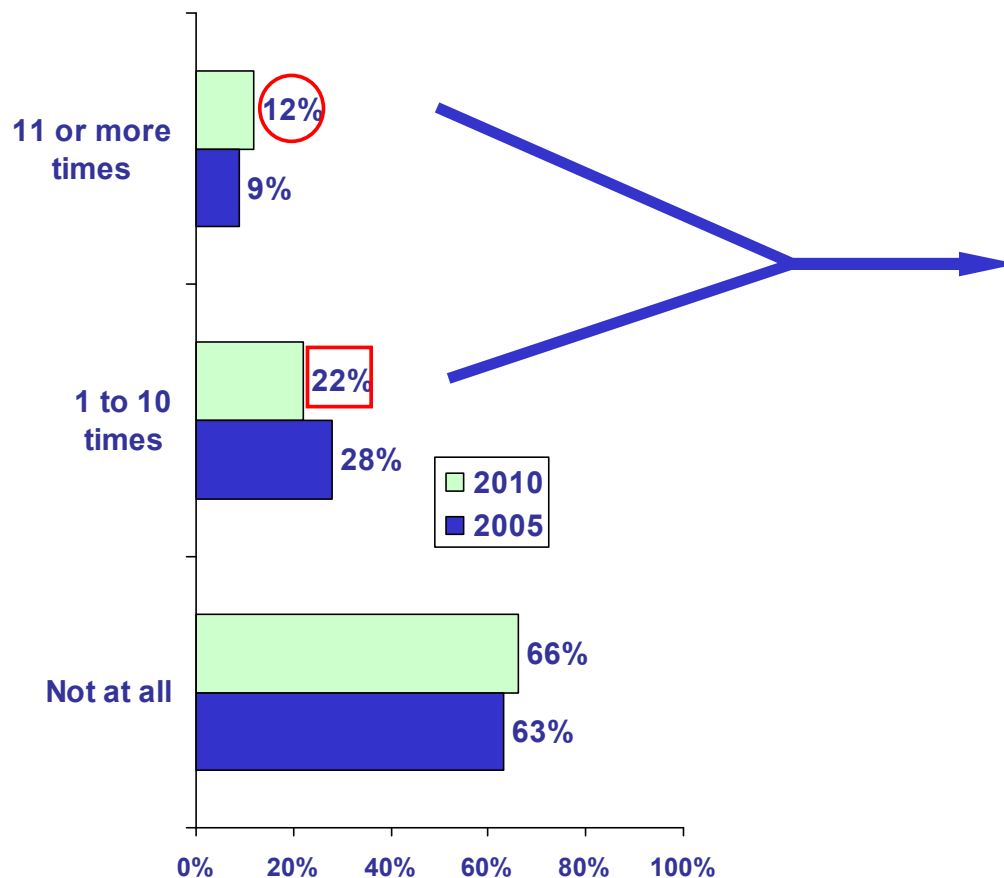
Base: All respondents (2005 - 1,102; 2010 - 1100); those who accessed electronic materials on library's web page (2005 - 62; 2010 - 134).

\* Wording changed in 2010.



- In 2005, respondents were asked two different questions – one about whether they had ever used the library via the Internet (results of which were shown on page 15) and another about how many times they had used the library’s website (which generated the figures shown in the chart below). This year, these two questions were combined with revised wording, making year-over-year comparisons somewhat problematic. Despite this complication, it appears that those who do access the library using the Internet are doing so more frequently than was the case five years ago.

## Times Accessed Library Remotely by Internet in Past Year\*



## Any Remote Access by Internet

<u>In-Person Library Use</u>	
None	6%
<b>1-10 times</b>	<b>40%</b>
<b>11+ times</b>	<b>59%</b>
<u>Bookstore Use</u>	
None	18%
<b>Any</b>	<b>37%</b>
<u>Age</u>	
18-24	46%
25-34	38%
35-54	37%
55+	23%
<u>Children in Home</u>	
<b>Yes</b>	<b>40%</b>
No	31%

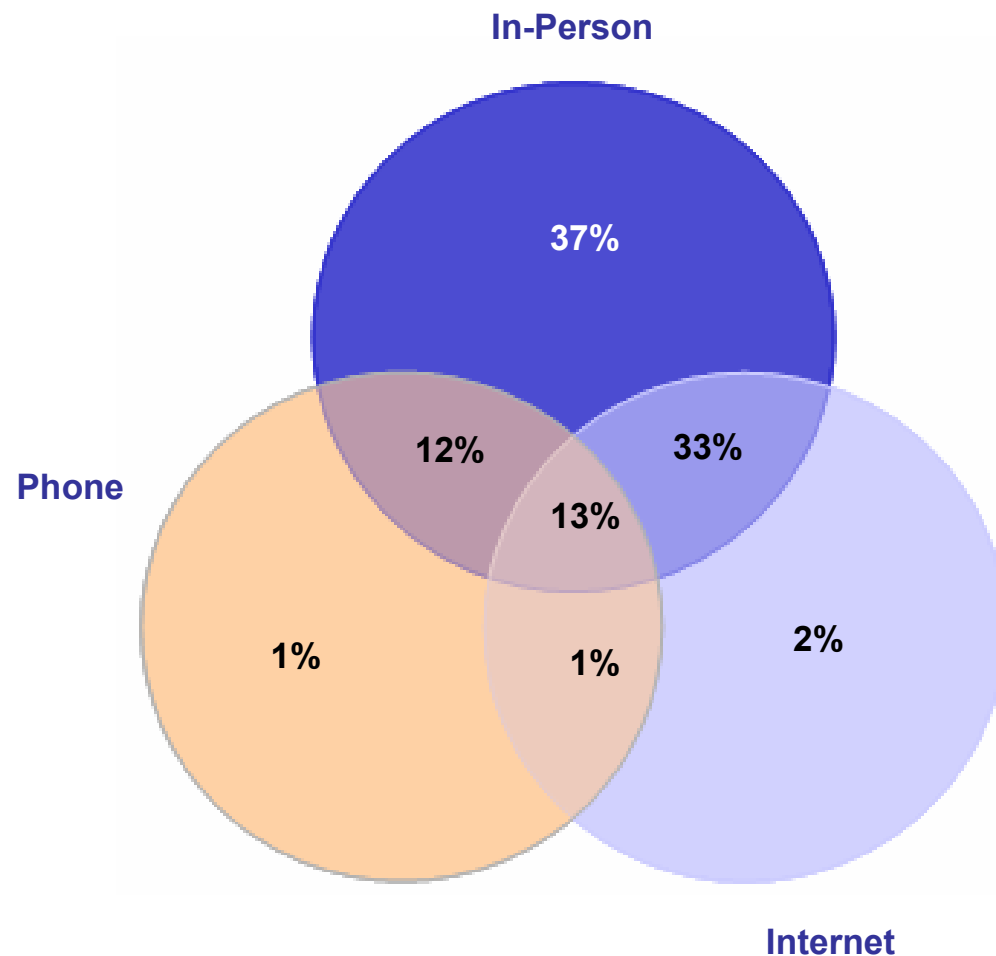
Q.3

Base: All respondents (2005 - 1102; 2010 - 1100).

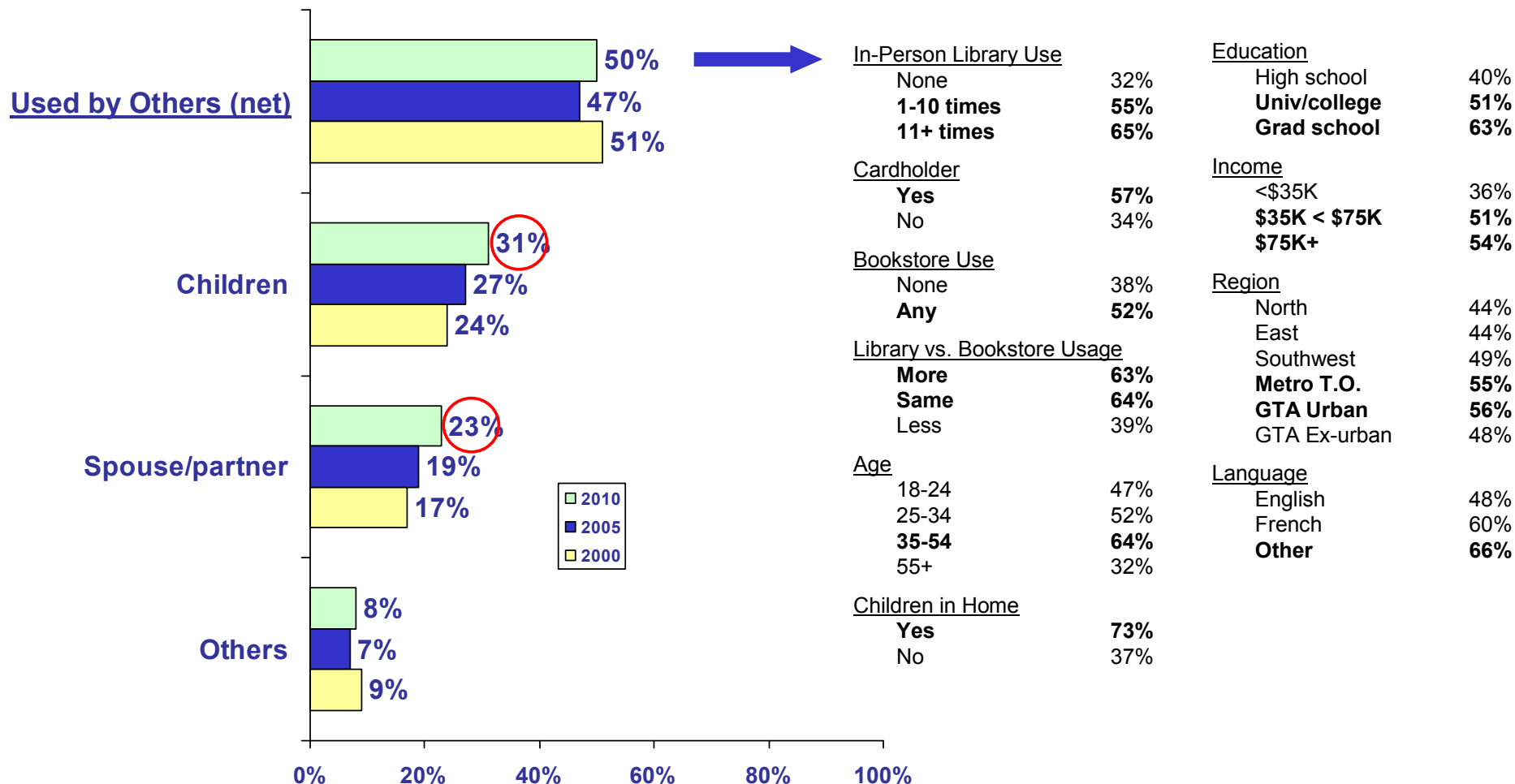
\* Wording changed in 2010.

# Ways Users Access the Public Library

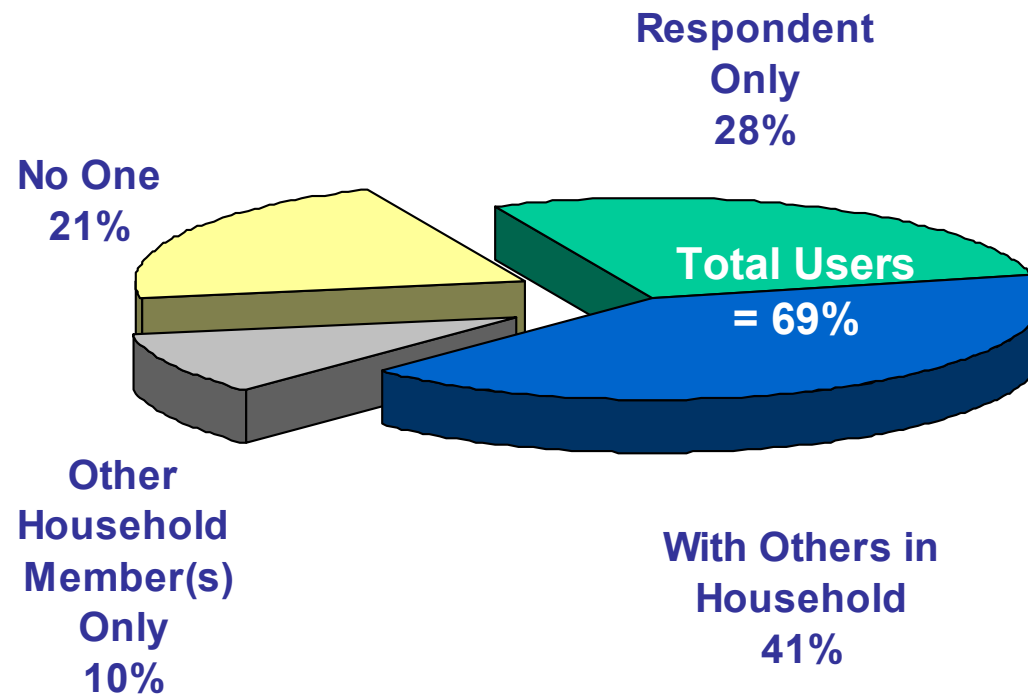
- The diagram below depicts all past year library users according to their reported methods of accessing the library.
- In-person only visits remain the most common method of access, with the in-person/Internet combination following closely behind.
- It is clear that, to date, alternative methods of access have been used as additions to, as opposed to replacements for, visiting the library in person.



- The reported incidence of children and spouses using the public library has risen significantly in 2010.
- Family usage of the library is more prevalent in Toronto and urban 905 areas, and among the 10% of the population who don't speak English or French at home.

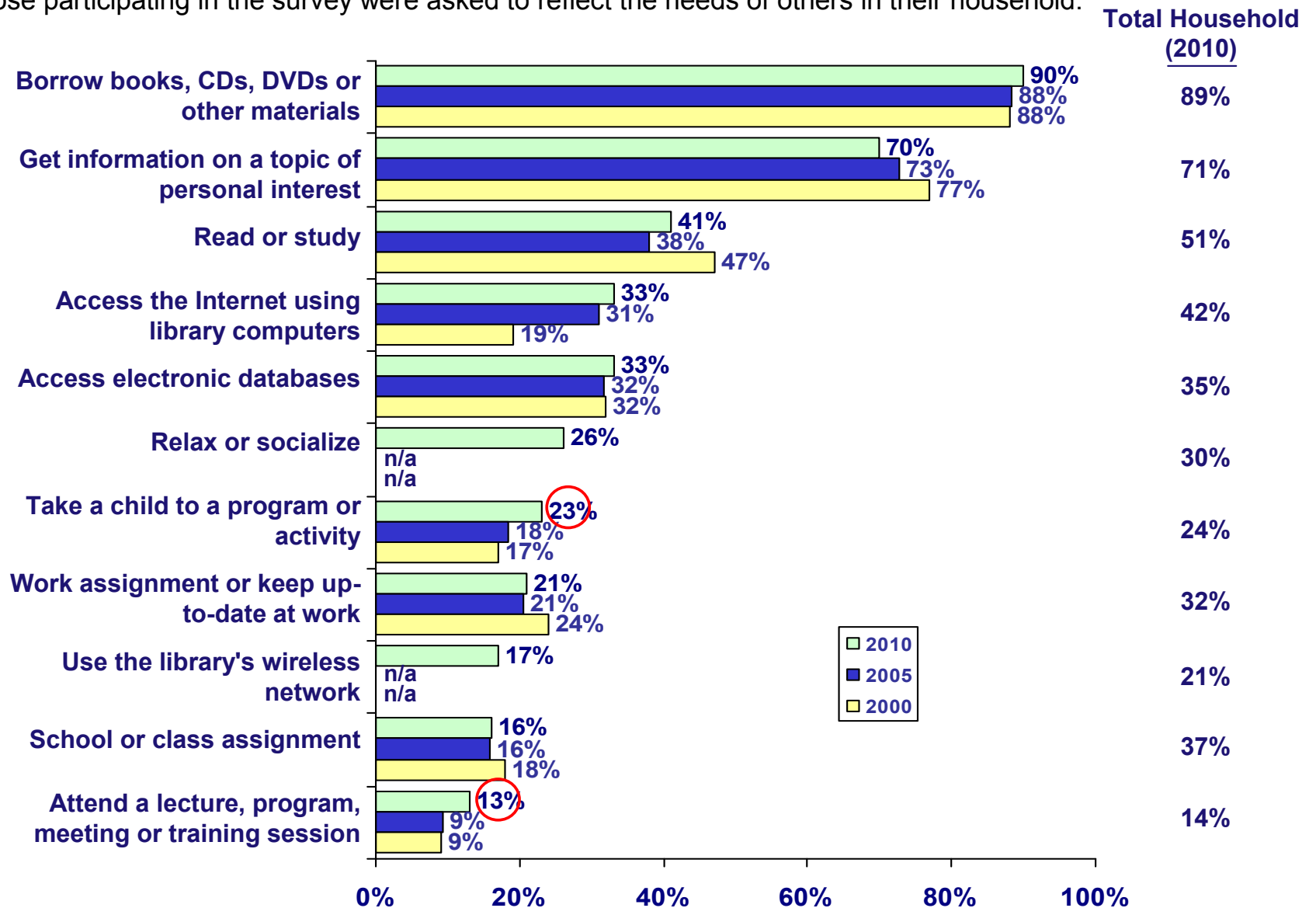


- Taking the total population into account, about four-fifths of Ontario households have made use of the public library system in the past year.
- The majority of households that are using the library contain more than one user.



# Reasons for Personally Using the Public Library

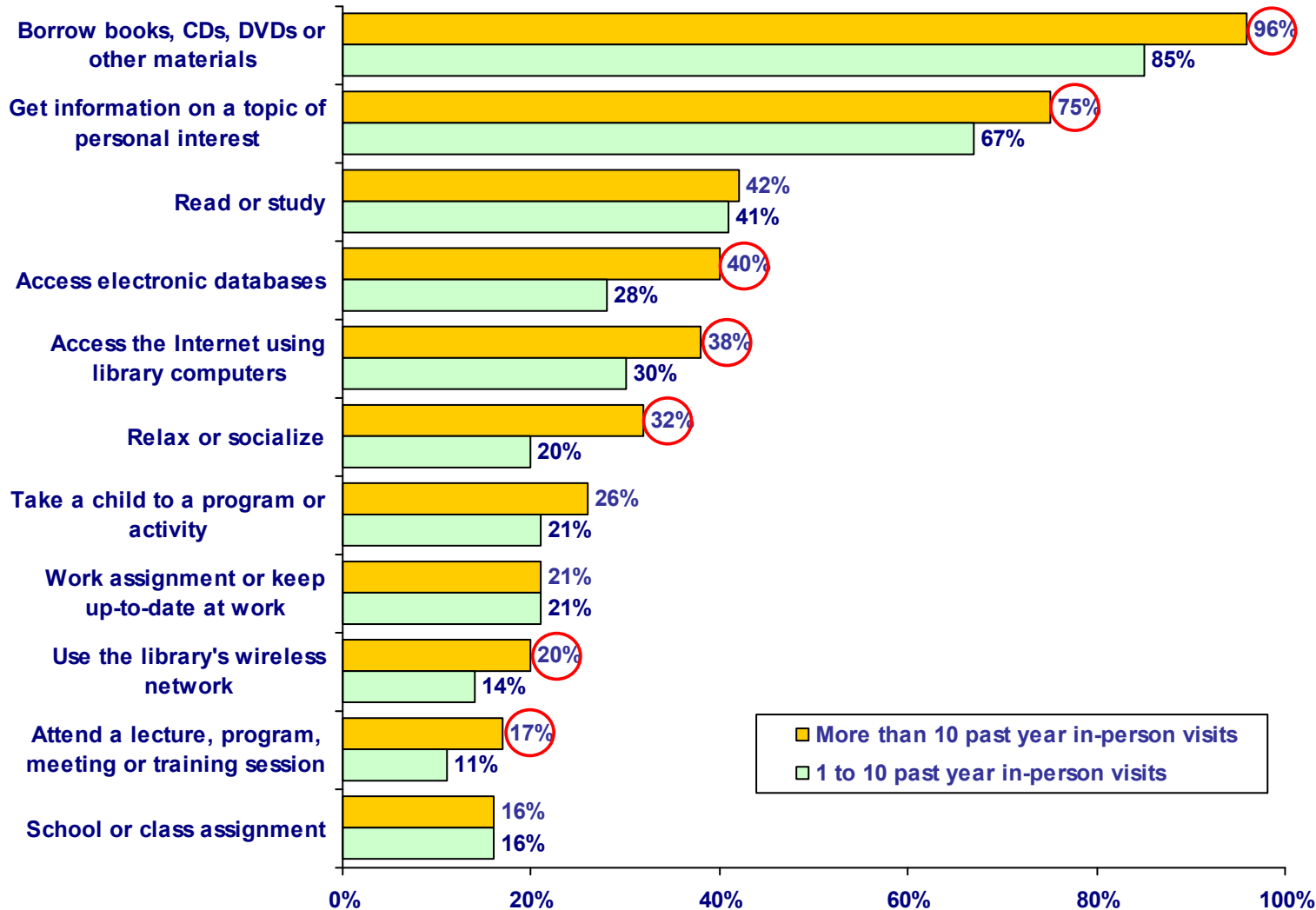
- Library programs, for children and others, were more often cited by respondents as reasons for personally visiting the library in 2010. Certain activities, especially those geared to students or youth, emerged as even greater motivators when those participating in the survey were asked to reflect the needs of others in their household.



Q.6a  
 Base: Those who personally visited the public library (2000 - 678; 2005 - 713; 2010 - 723);  
 households where anyone used the public library (2010 - 843).

# Reasons for Personally Using the Public Library by Frequency of Library Use (Current Year)

- More frequent visits to the library are associated with borrowing materials, gathering information on topics of interest, electronic/wireless access, relaxing/socializing, and participation in library programs.



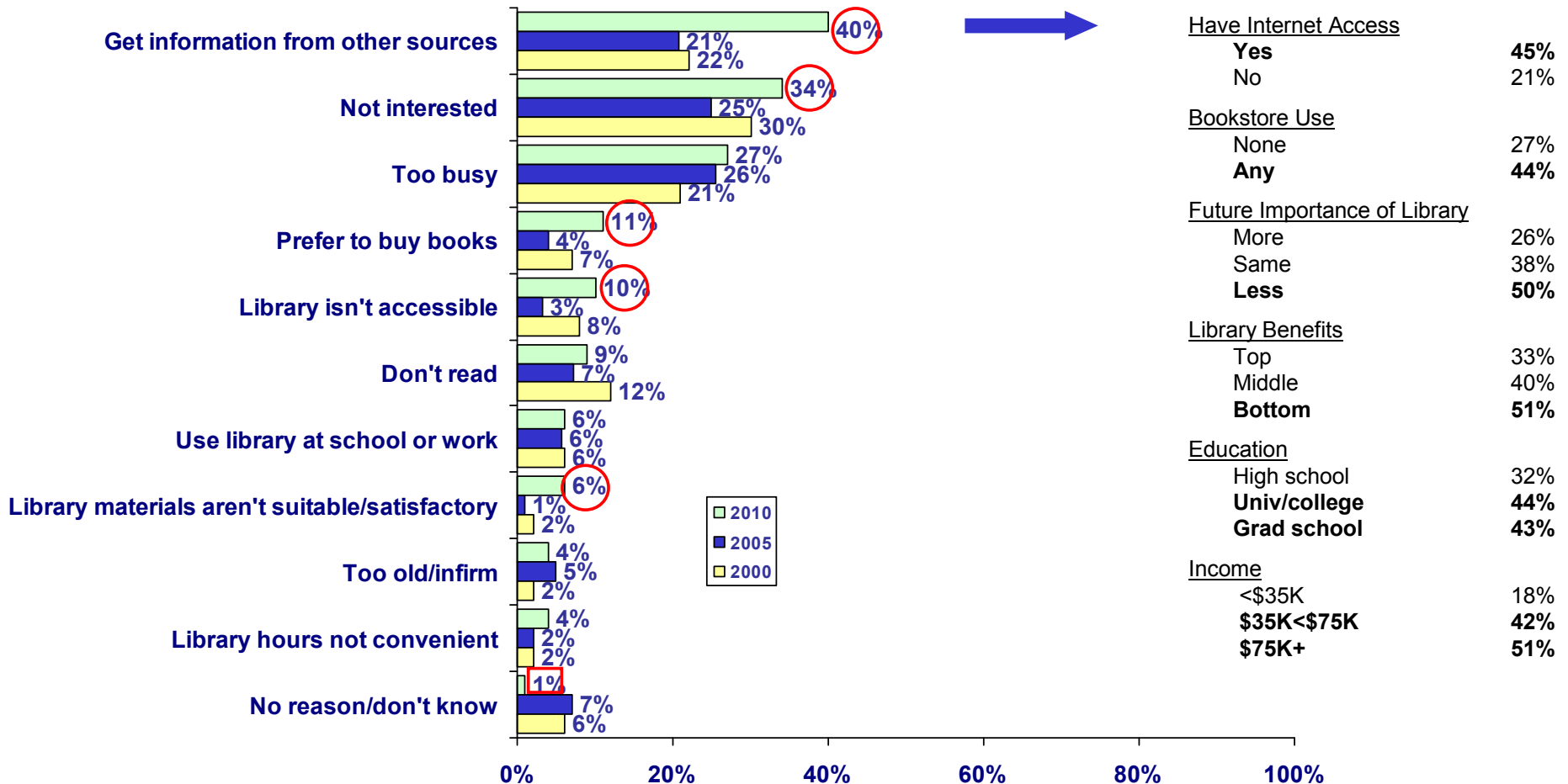
- The number of library cardholders, in-person visitors and reported number of visits per user have not really changed in the past 10 years.
- The last five years have seen an increase in use of the library by electronic means (but there has been no significant change in the types of materials being accessed electronically).
- The Internet and, to a lesser extent, telephone are being used as supplementary ways to access the library, not as a replacement for in-person visits.
- Students, young families, and people for whom English and French are second languages are some of the library's key constituencies.
- In 2010, more respondents and their family members appear to be using the library and participating in library sponsored programs/activities.
- Within the adult population, the 18-24 age group comprises the biggest users of public libraries and is also the group most likely to take advantage of any Internet services that are offered.

# USE OF ALTERNATIVE INFORMATION CHANNELS



# Total Reasons for Not Using the Public Library in the Past Year

- This year, respondents who hadn't used the public library mentioned more reasons for non-use than their predecessors.
- Getting information from other sources has become the dominant reason cited, overtaking more vague explanations about being not interested or too busy.



Q.9a/b

Base: Past year public library non-users (2000 - 326; 2005 - 389; 2010 - 343).

Note: Mentions of 3% or more only. May total more than 100%, due to multiple mentions.

# What the Library Could Do to Attract Non-Users

- When asked what the public library could do differently to get them to use the library in the coming year, half of all non-users actually said “nothing” or “don’t know” while another one-quarter gave responses that implied the same thing.
- From the few who did offer suggestions, nothing stands out as being a major opportunity for the library to capitalize on.

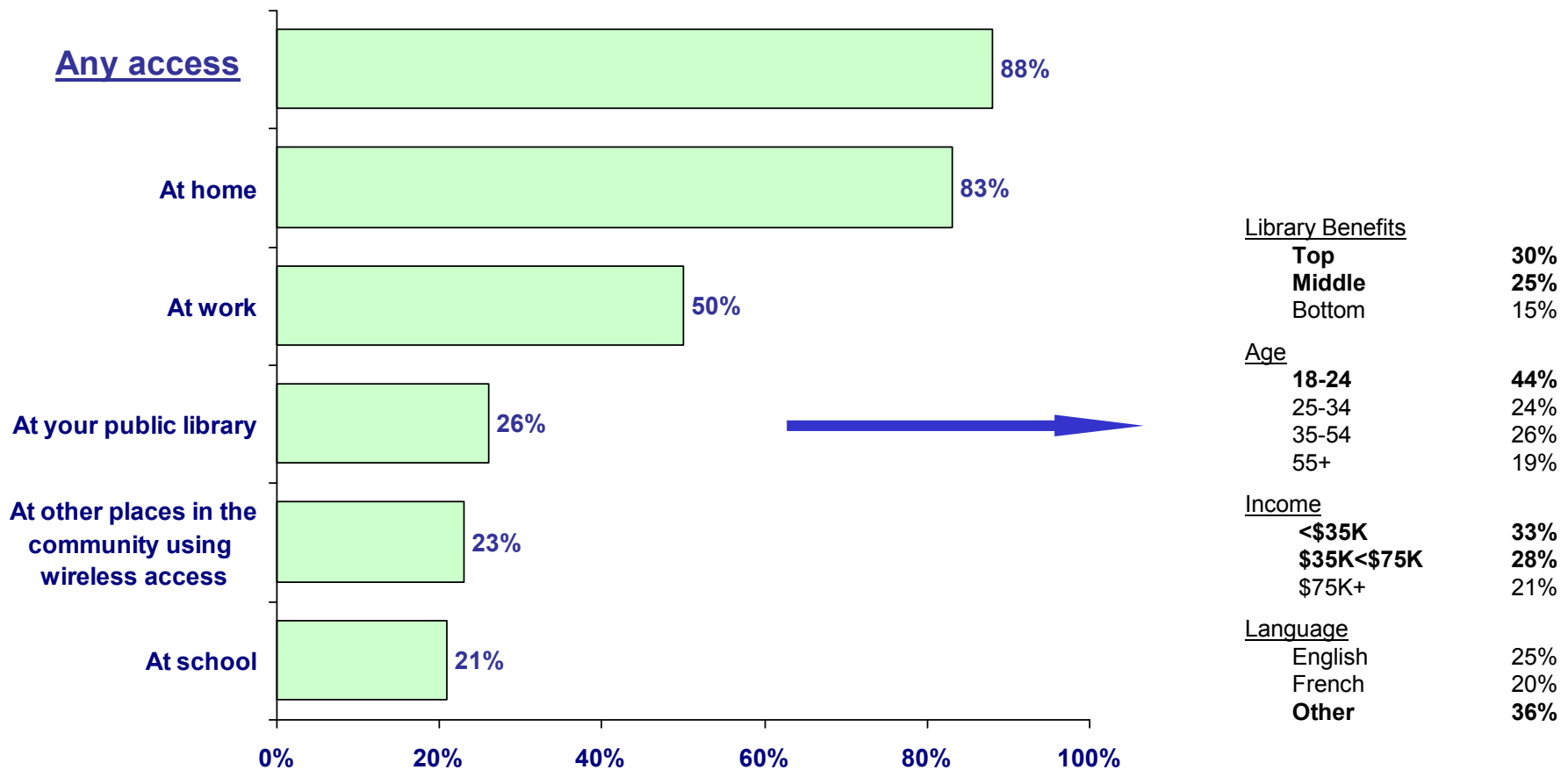
<b>Nothing (Net)</b>	<b>76%</b>
Nothing / Don't know	51%
Don't have time / no need / no interest	15%
Satisfied with library	4%
Can get information elsewhere	3%
Plan to use library in future	3%
<b>Suggestions (Net)</b>	<b>24%</b>
More resources / services	10%
More locations / closer to home	3%
More marketing about what's available	3%
Better hours	3%
Reduce penalty fees	1%
Other	5%



Online/electronic books	2%
More hardcopy books (general, specific topics)	2%
Courses on computer use	1%
Online library access	1%
Movies/DVDs	1%

# Ways Internet Was Accessed in the Past Year\*

- At nearly 90%, use of the Internet has become almost universal amongst the Ontario adult population, with the vast majority of Internet users now having home access.
- The youngest respondents, those with lower household incomes, and those who don't speak English or French at home tended to be the library's biggest Internet users.

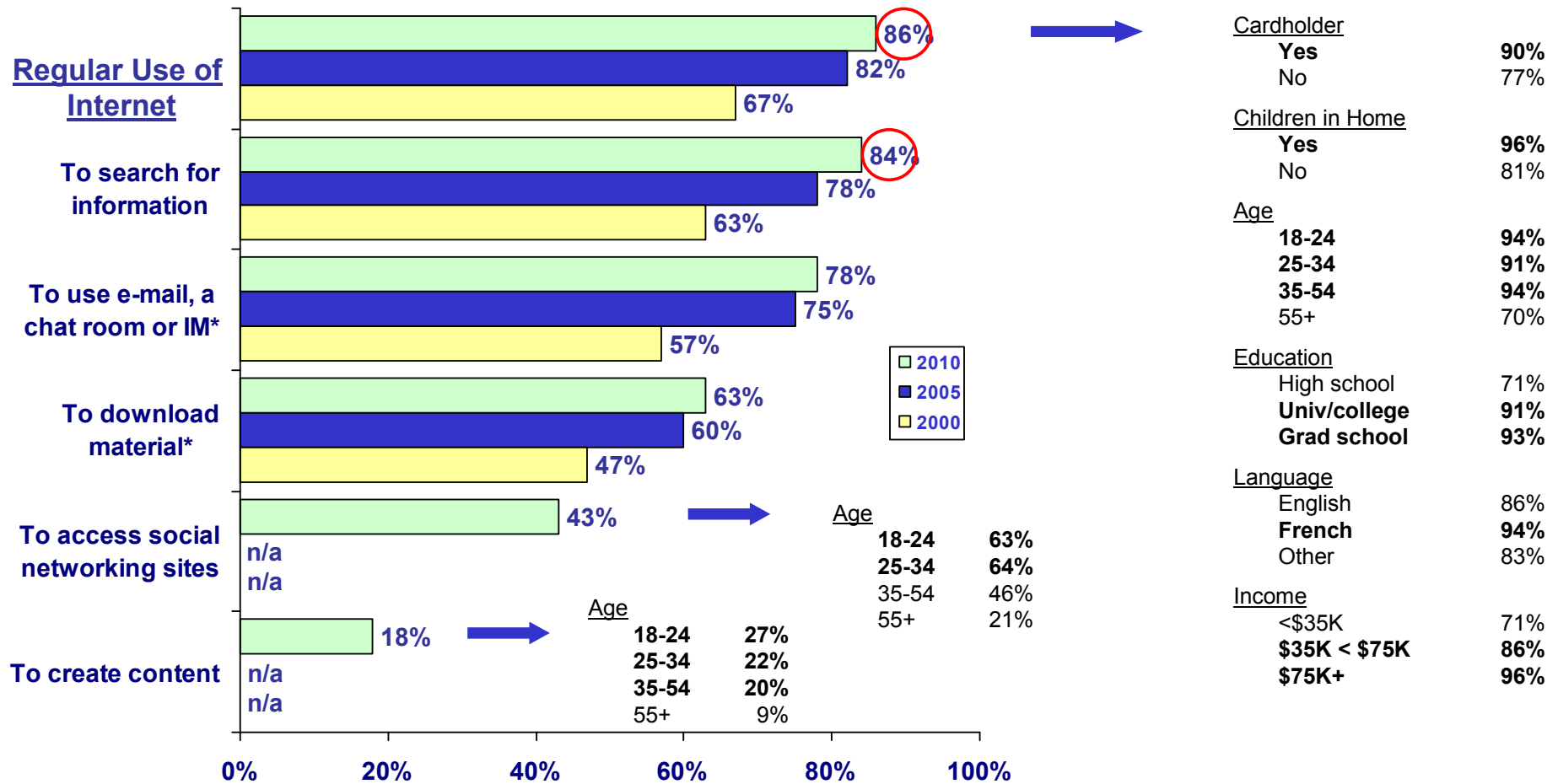


Q.10

Base: All respondents (2010 - 1100).

\* Change of wording in 2010 makes comparisons to earlier data invalid.

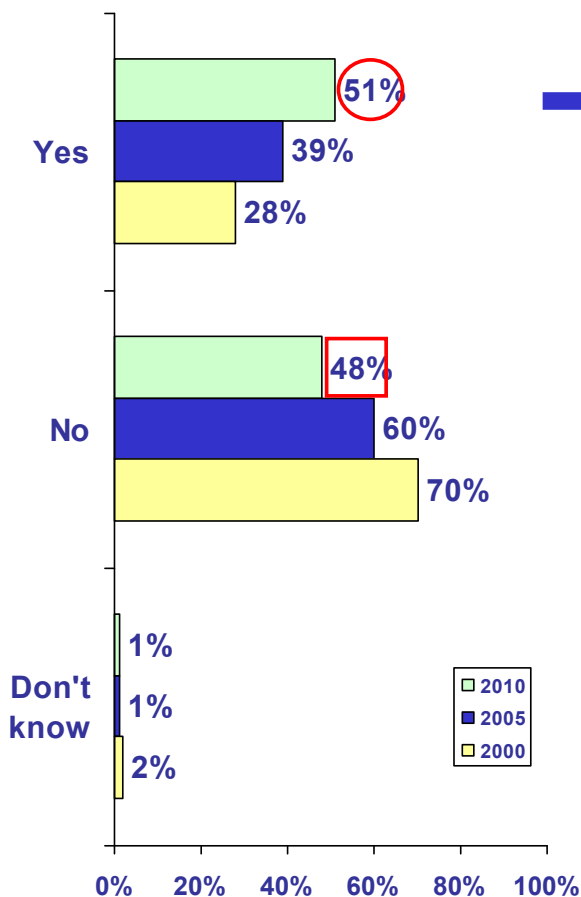
- Use of the Internet in general, and in particular to search for information, has increased over the last five years.
- During this time period, social networking has become commonplace, with almost two-thirds of the under 35 age group claiming to be regular users.



Q.11  
 Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100).  
 \* Wording changed in 2010.

# Whether Use of Internet Has Changed How Library Is Used

- The number of people who claim the Internet has changed the way they use the library has risen steadily since 2000.
- These changes are associated with accessing the library via the Internet, and also with less frequent in-person library visits.

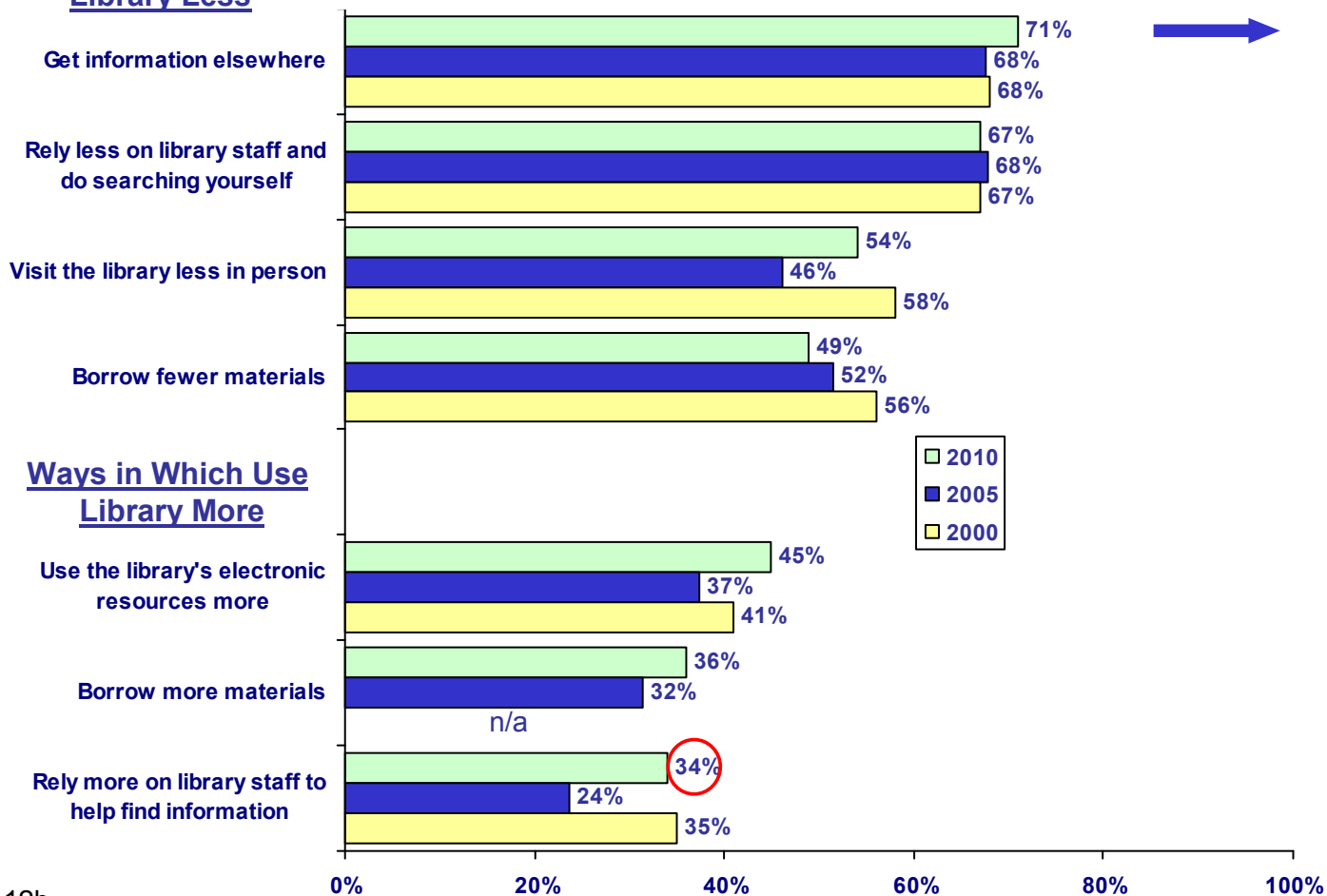


<u>In-Person Library Use</u>	
<b>1-10 times</b>	<b>55%</b>
11+ times	45%
<u>Access Library by Internet</u>	
<b>Yes</b>	<b>61%</b>
No	39%
<u>Gender</u>	
<b>Male</b>	<b>56%</b>
Female	47%
<u>Education</u>	
High school	44%
Univ/college	51%
<b>Grad school</b>	<b>60%</b>
<u>Region</u>	
North	38%
<b>East</b>	<b>57%</b>
Southwest	44%
Metro T.O.	51%
<b>GTA Urban</b>	<b>57%</b>
GTA Ex-urban	54%

# Ways Use of the Internet Has Changed Use of the Public Library

- For those reporting any change, the Internet has tended to cause them to use libraries less rather than more.
- Interestingly though, getting information elsewhere does not appear to affect users' perceptions about the future importance of the library or the benefit it offers compared to other publically funded services.

## Ways in Which Use Library Less



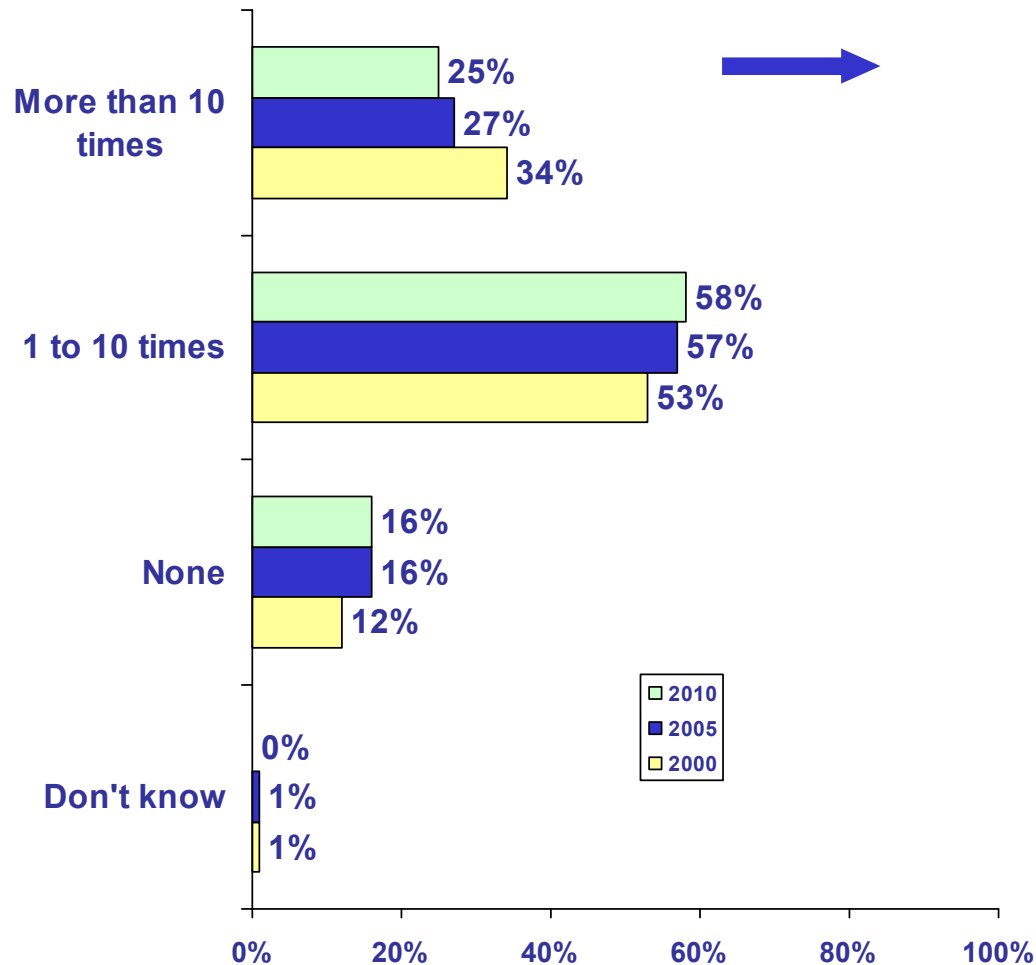
<u>In-Person Library Use</u>	
1-10 times	76%
11+ times	65%
<u>Bookstore Use</u>	
None	65%
1-10 times	67%
11+ times	81%
<u>Library vs. Bookstore Usage</u>	
More	66%
Same	67%
Less	82%
<u>Future Importance of Library*</u>	
More	73%
Same	70%
Less	71%
<u>Library Benefits*</u>	
Top	71%
Middle	69%
Bottom	74%
<u>Income</u>	
<\$35K	60%
\$35K<\$75K	69%
\$75K+	77%
<u>Region</u>	
North	83%
East	71%
Southwest	61%
Metro T.O.	73%
GTA Urban	77%
GTA Ex-urban	70%

Q.12b

Base: Past year public library users who use the Internet and state that access has changed the way they use the public library (2000 - 135; 2005 - 224; 2010 - 344).

\* Notable for lack of difference.

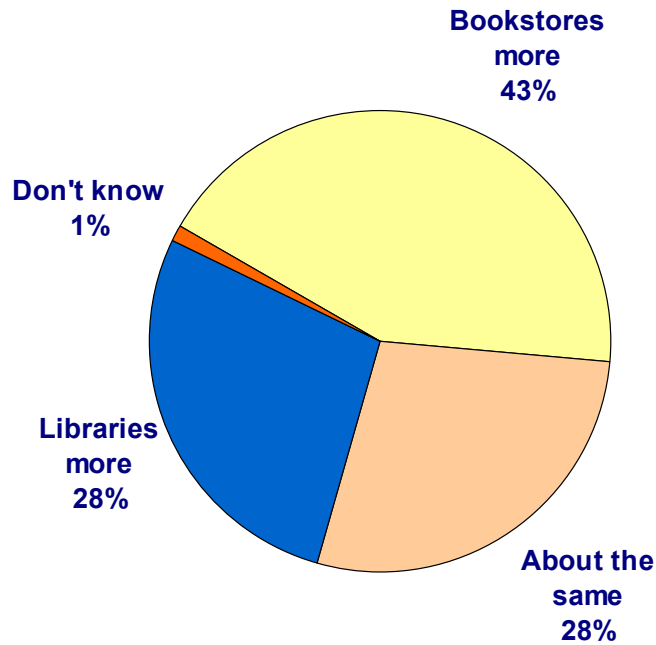
- Bookstore usage has been gradually declining over the last ten years, at least with respect to frequency of visits.
- Frequent bookstore usage is associated not only with higher levels of income and education, but also with higher usage of, and support for, the public library system.



<u>Cardholder</u>	
<b>Yes</b>	<b>28%</b>
No	19%
<u>Education</u>	
High school	17%
<b>Univ/college</b>	<b>28%</b>
<b>Grad school</b>	<b>34%</b>
<u>In-Person Library Use</u>	
None	18%
<b>1-10 times</b>	<b>26%</b>
<b>11+ times</b>	<b>33%</b>
<u>Library vs. Bookstore Usage</u>	
More	23%
Same	29%
<b>Less</b>	<b>36%</b>
<u>Library Benefits</u>	
<b>Top</b>	<b>30%</b>
Middle	23%
Bottom	23%
<u>Income</u>	
<\$35K	17%
\$35K < \$75K	24%
<b>\$75K+</b>	<b>33%</b>

# Frequency of Visiting Bookstore vs. Library

- When asked directly, Ontario's bookstore users claim to be using bookstores more than libraries. The table below, which shows respondents' reported visits to both bookstores and libraries, substantiates this claim.
- It is important to note, however, that this result is driven by the fact that those who use bookstores and not libraries outnumber those who use libraries and not bookstores, by about 3:1. In fact, looking at only people who said they used both in the past year (as shown inside the table's black border) libraries were actually used more than bookstores.



### In-Person Library Use

None	81%
1-10 times	39%
11+ times	8%

### Cardholder

Yes	31%
No	72%

### Future Importance of Library

More	32%
Same	36%
Less	61%

### Library Benefits

Top	31%
Middle	46%
Bottom	66%

### Education

High school	49%
Univ/college	43%
Grad school	33%

### Language

English	46%
French	40%
Other	22%

### Income

<\$35K	34%
\$35K < \$75K	41%
\$75K+	50%

### Community Size

< 30K	52%
30K < 500K	42%
500K+	41%

Bookstore Visits	21+	11-20	6-10	1-5	None
	3%	3%	7%	14%	8%
Library Visits	21+	11-20	6-10	1-5	None
	3%	3%	5%	10%	3%
	1%	2%	3%	4%	1%
	1%	2%	2%	4%	2%
	3%	4%	2%	4%	2%

Bookstores more = 42%

Same amount = 26%

Libraries more = 31%

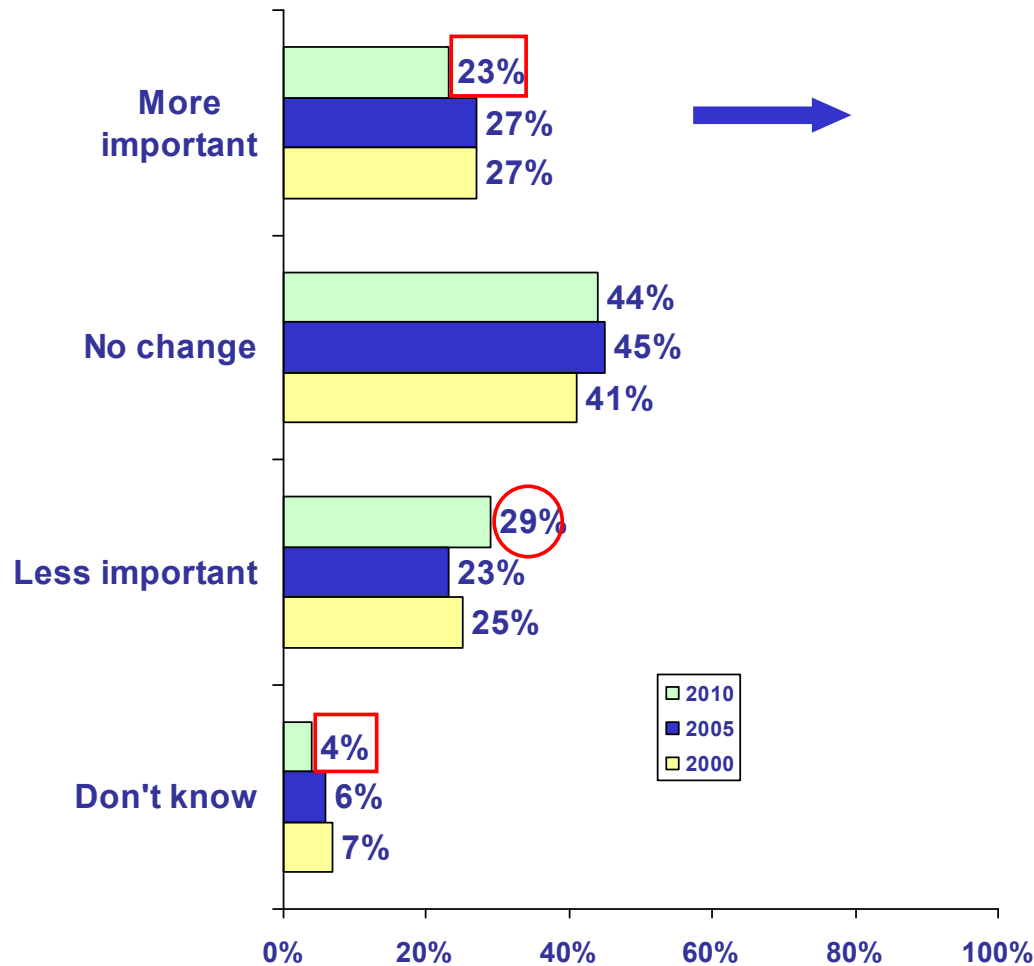


- Internet access in Ontario has become more prevalent and more convenient in the last five years.
- Despite the high percentage of households having home access, there is still a sizable part of the population that has used the library's Internet service in the past year.
- With the exception of some seniors, nearly all adults claim to be using the Internet regularly for some purpose, most typically to search for information.
- Even though alternative information sources are now cited more often as a reason for not using libraries, the characteristics of non-users haven't changed appreciably over the years and it's not clear what the library can do to attract them.
- There is a growing perception that the Internet is altering the way in which libraries are used, but reported usage data suggest that this may be more perception than reality at this point.
- Bookstore users are primarily one of two types – those who use bookstores as a substitute for libraries and those who augment their library use with bookstore visits; the second group is much larger than the first and still tends to utilize libraries more than bookstores.

# ATTITUDES TOWARD THE PUBLIC LIBRARY

# Opinion of Future Importance of Public Libraries

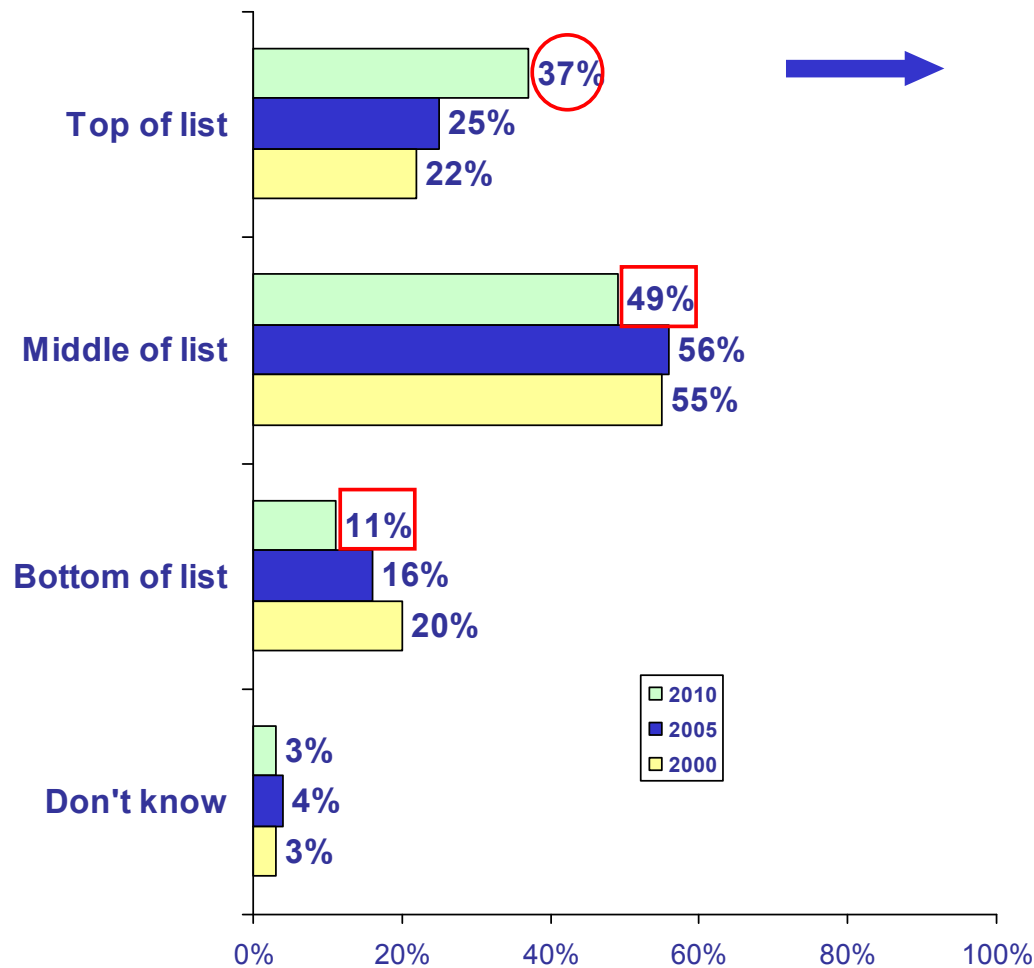
- For the first time since this study has been conducted, Ontarians are more inclined to think libraries will become less important, as opposed to more important, as online availability of materials increases.
- Those who think the library will come more important tend to have lower incomes, lack Internet access, be age 55 or older, and not have English or French as their household's preferred language.



<u>In-Person Library Use</u>		
None	19%	
1-10 times	23%	
<b>11+ times</b>	<b>30%</b>	
<u>Cardholder</u>		
<b>Yes</b>	<b>26%</b>	
No	19%	
<u>Access Library by Phone</u>		
<b>Yes</b>	<b>33%</b>	
No	21%	
<u>Have Internet Access</u>		
Yes	21%	
<b>No</b>	<b>40%</b>	
<u>Library Benefits</u>		
<b>Top</b>	<b>34%</b>	
Middle	18%	
Bottom	9%	
<u>Age</u>		
18-24		22%
25-34		20%
35-54		19%
<b>55+</b>		<b>31%</b>
<u>Language</u>		
English		21%
French		31%
<b>Other</b>		<b>39%</b>
<u>Income</u>		
<b>&lt;\$35K</b>		<b>34%</b>
<b>\$35K &lt; \$75K</b>		<b>28%</b>
\$75K+		17%
<u>Region</u>		
North		26%
East		23%
Southwest		21%
<b>Metro T.O.</b>		<b>30%</b>
GTA Urban		21%
GTA Ex-urban		20%

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

- The library compares quite favourably to other unspecified tax-supported services, with over three times as many respondents saying it belongs at the top rather than the bottom of the list.
- The groups most likely to place the library at the top of the list are largely the same as those having a more positive view of the library's future, but for this question have been joined by those holding graduate degrees.



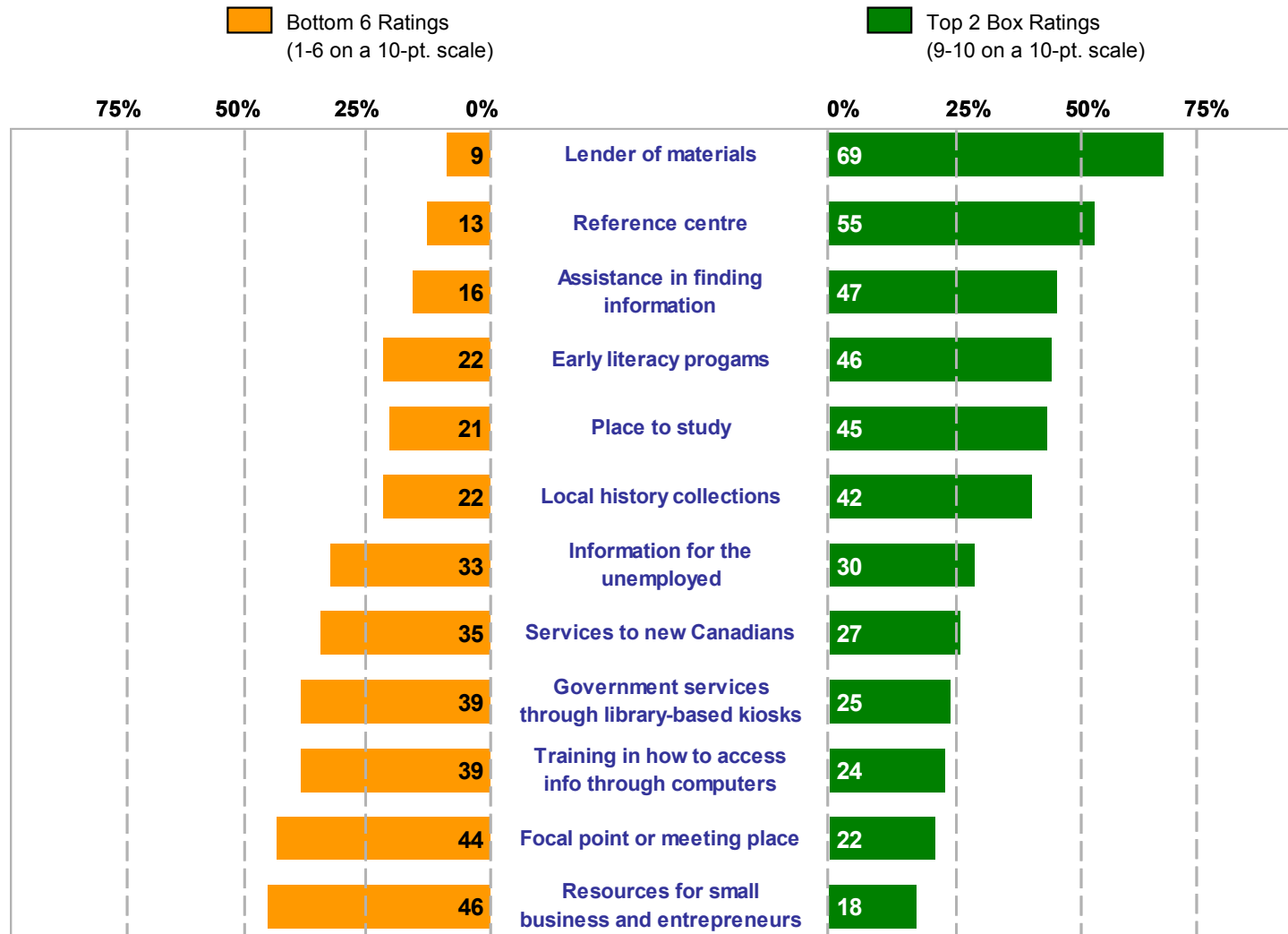
<u>Cardholder</u>	
<b>Yes</b>	<b>43%</b>
No	23%
<u>In-Person Library Use</u>	
None	23%
1-10 times	37%
<b>11+ times</b>	<b>54%</b>
<u>Future Importance of Libraries</u>	
<b>More</b>	<b>54%</b>
Same	38%
Less	21%
<u>Age</u>	
18-24	27%
25-34	37%
35-54	37%
<b>55+</b>	<b>40%</b>
<u>Education</u>	
High school	37%
Univ/college	35%
<b>Grad school</b>	<b>48%</b>
<u>Language</u>	
English	36%
French	23%
<b>Other</b>	<b>46%</b>
<u>Income</u>	
<b>&lt;\$35K</b>	<b>47%</b>
\$35K < \$75K	35%
\$75K+	33%

Q.16

Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100).

\* Wording changed in 2010 from *other tax-supported services such as schools, parks and roads* to *other municipal tax-supported services*.

- In a new question in 2010, the survey asked respondents how much value they place on services the library offers, regardless of whether they have ever made use of the services. As might be expected, the more traditional services that libraries have always offered rose to the top on the 10-point value scale that was used.

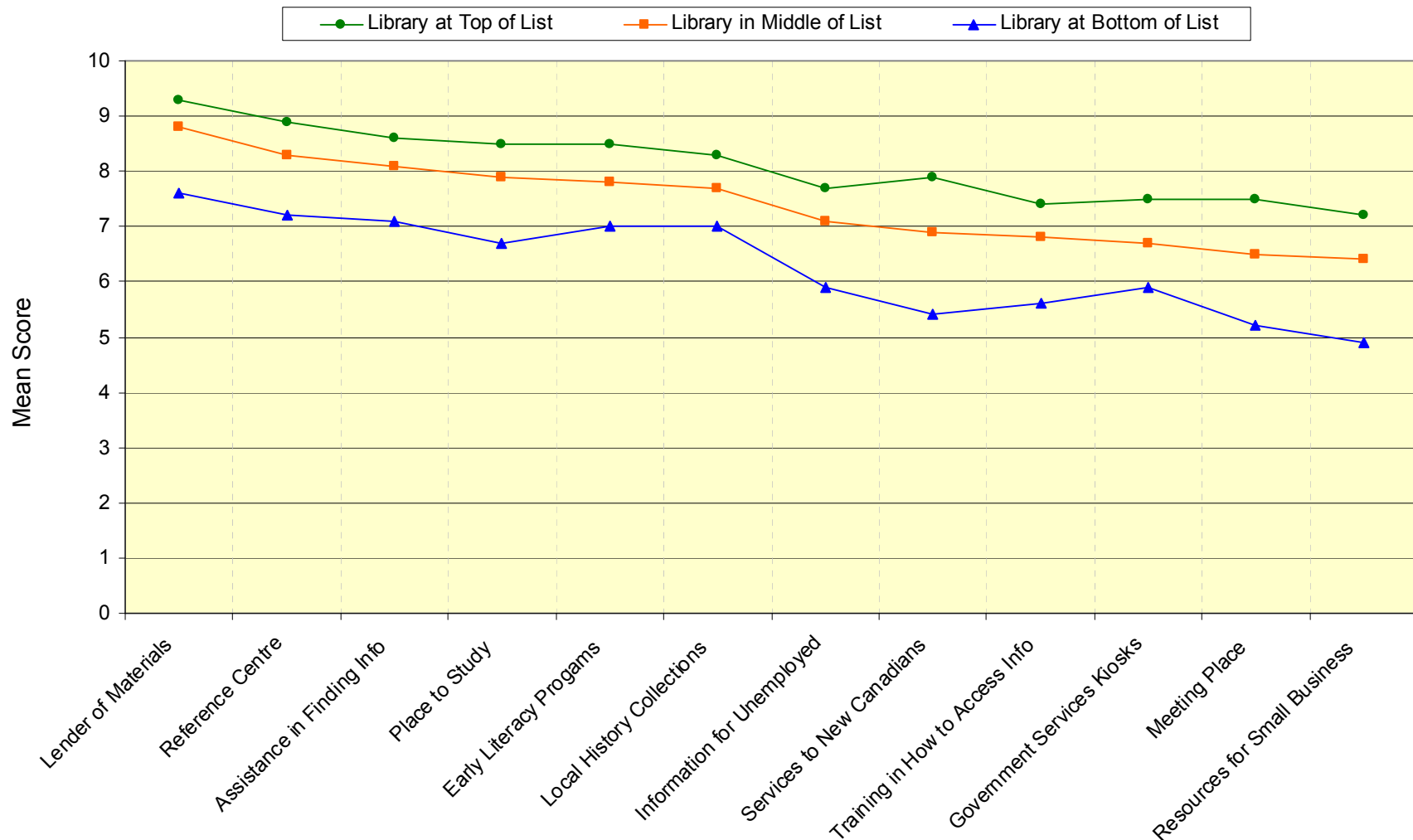


Q.17

Base: All respondents (2010 - 1100).

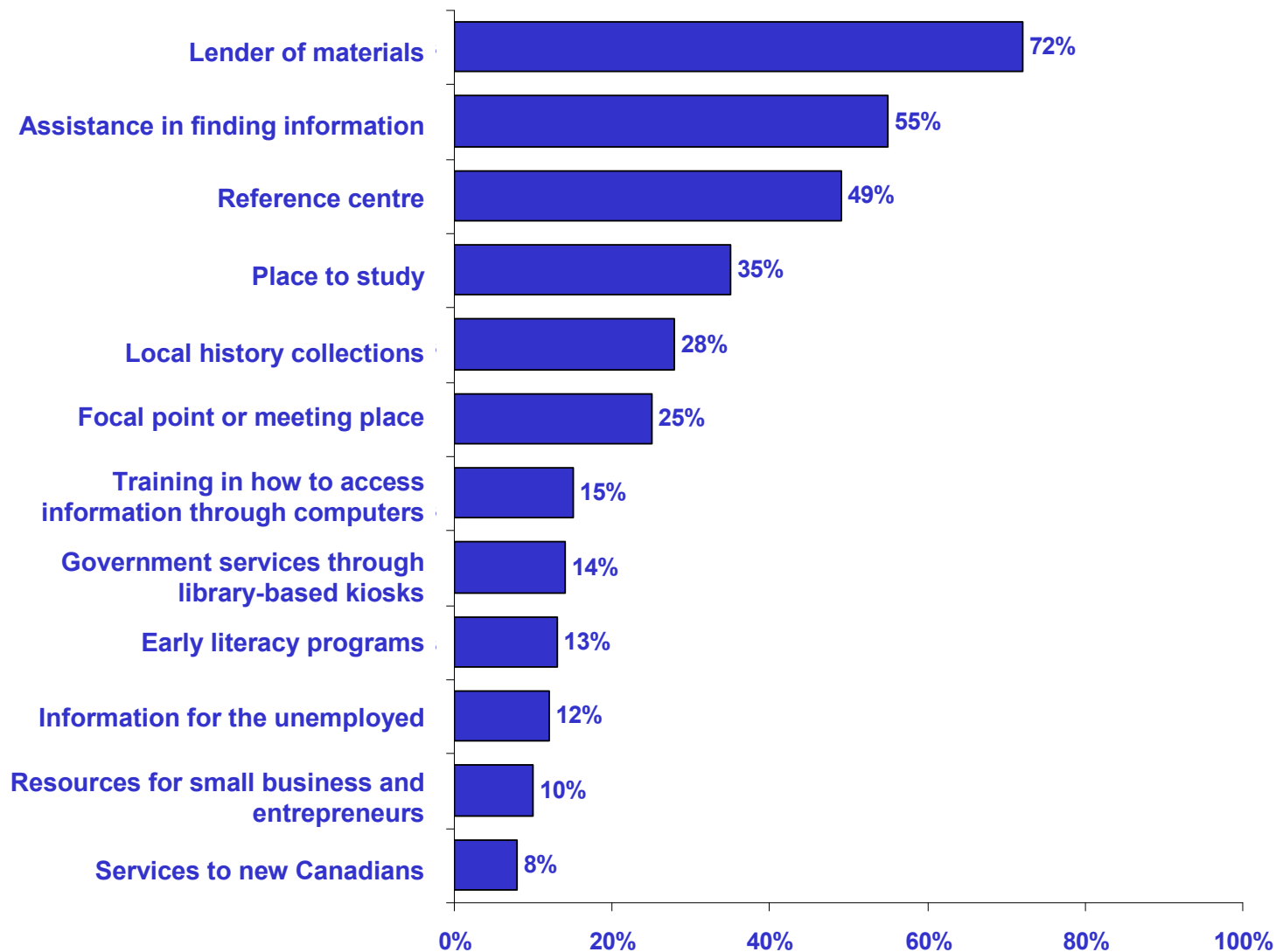
# Value of Services by How Library Ranks Compared to Other Municipal Tax-Supported Services

- The chart below presents the average value scores of the different library services according to whether the library was placed at the top, middle or bottom of the list relative to other tax-supported services.
- Services to new Canadians represents the biggest gap in value perceptions across the three groups.

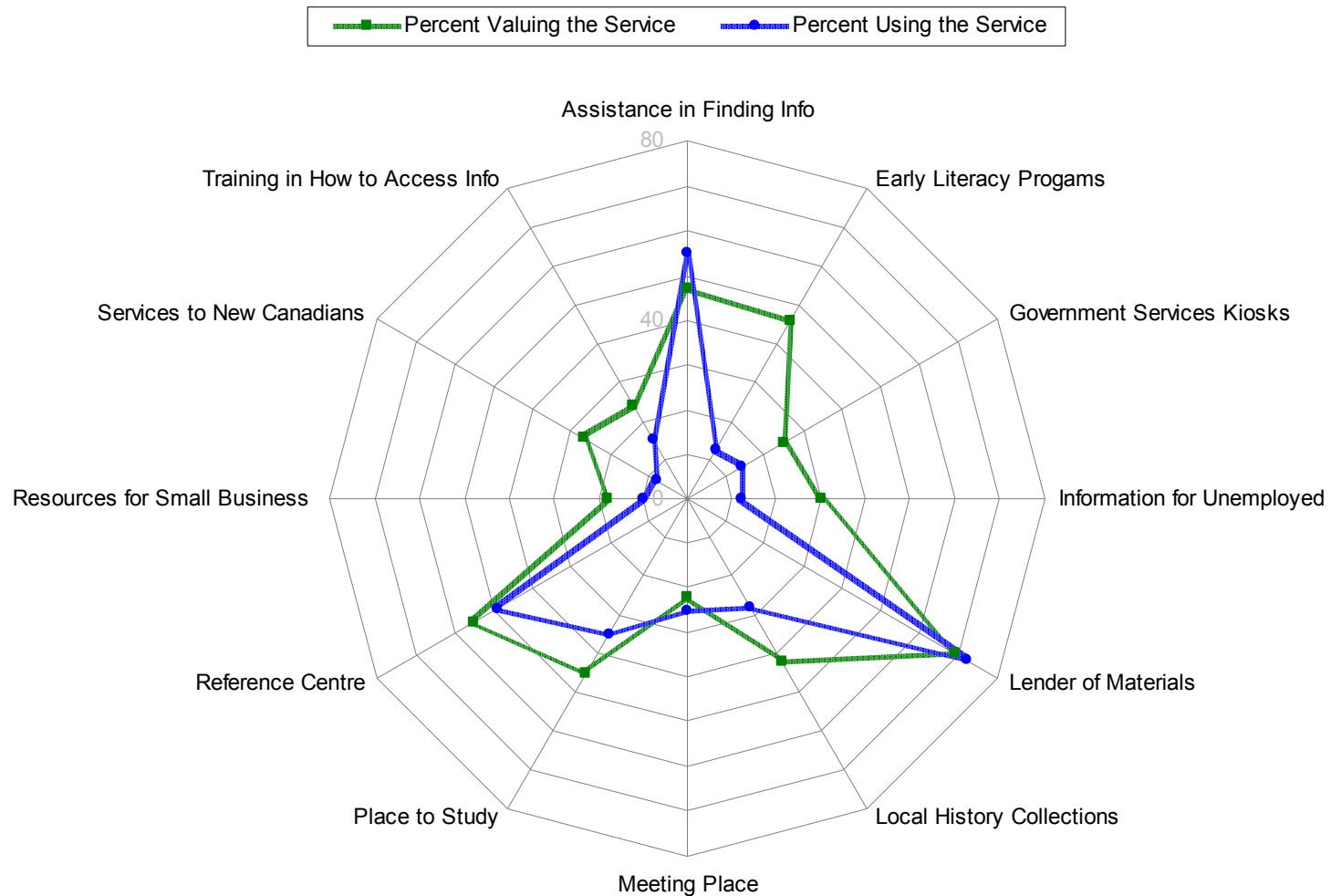


Q.16/Q.17  
 Base: All respondents (2010 - 1100).

- After being asked to rate the value of the services the library offers, respondents were then asked to indicate which of the services had been used by someone in their household during the past year. Reported usage of the library's newer and/or more targeted services landed in the 8% to 15% range.

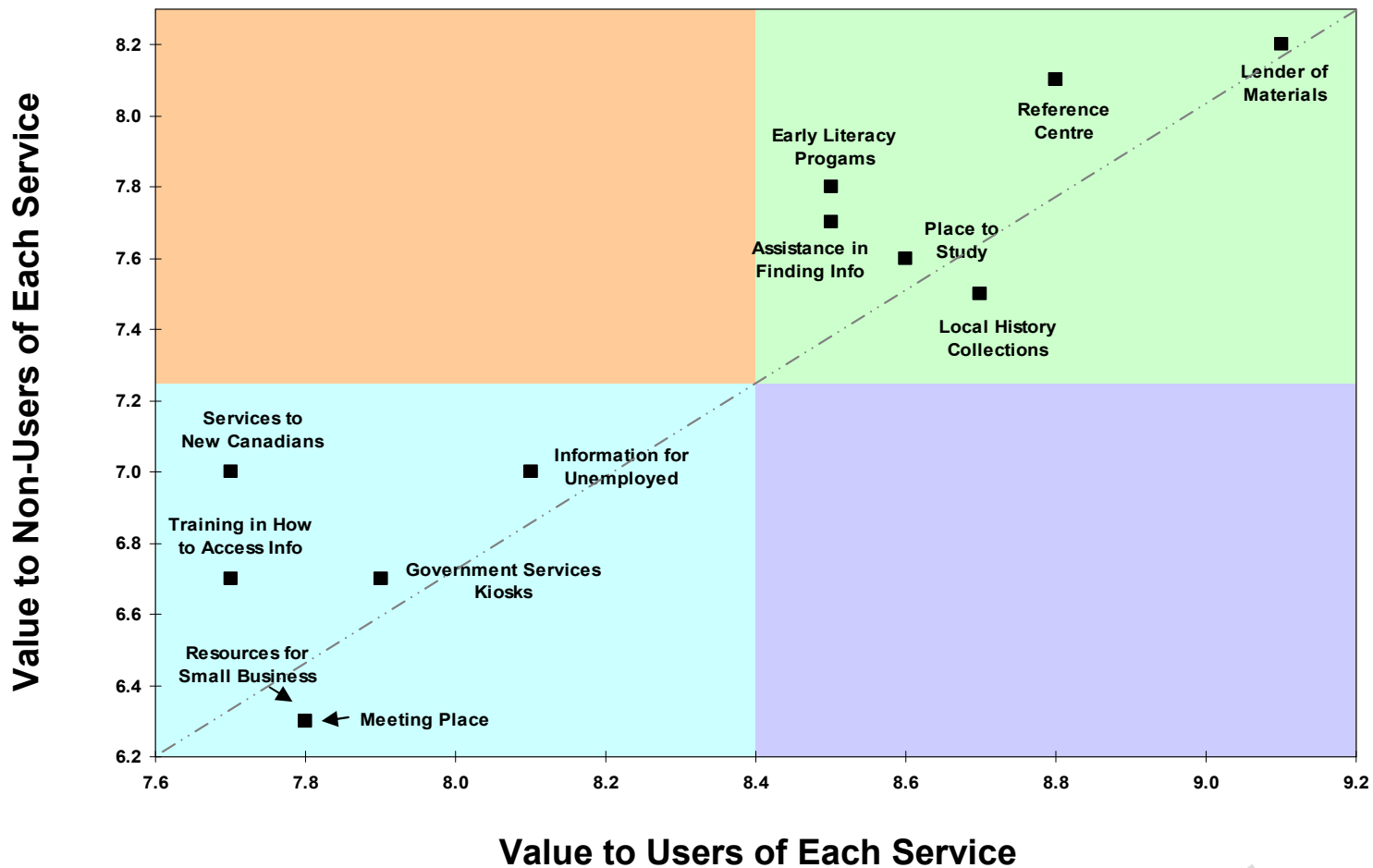


- For each of the library services, the diagram below plots perceived value (percent giving the service a score of 9 or 10 on the 10-point value scale) along with reported usage.
- For more traditional services (lender of materials, reference centre, and assistance in finding information) usage and value scores are both very high.
- For most other services, especially early literacy programs, the perceived value is higher than the actual usage.



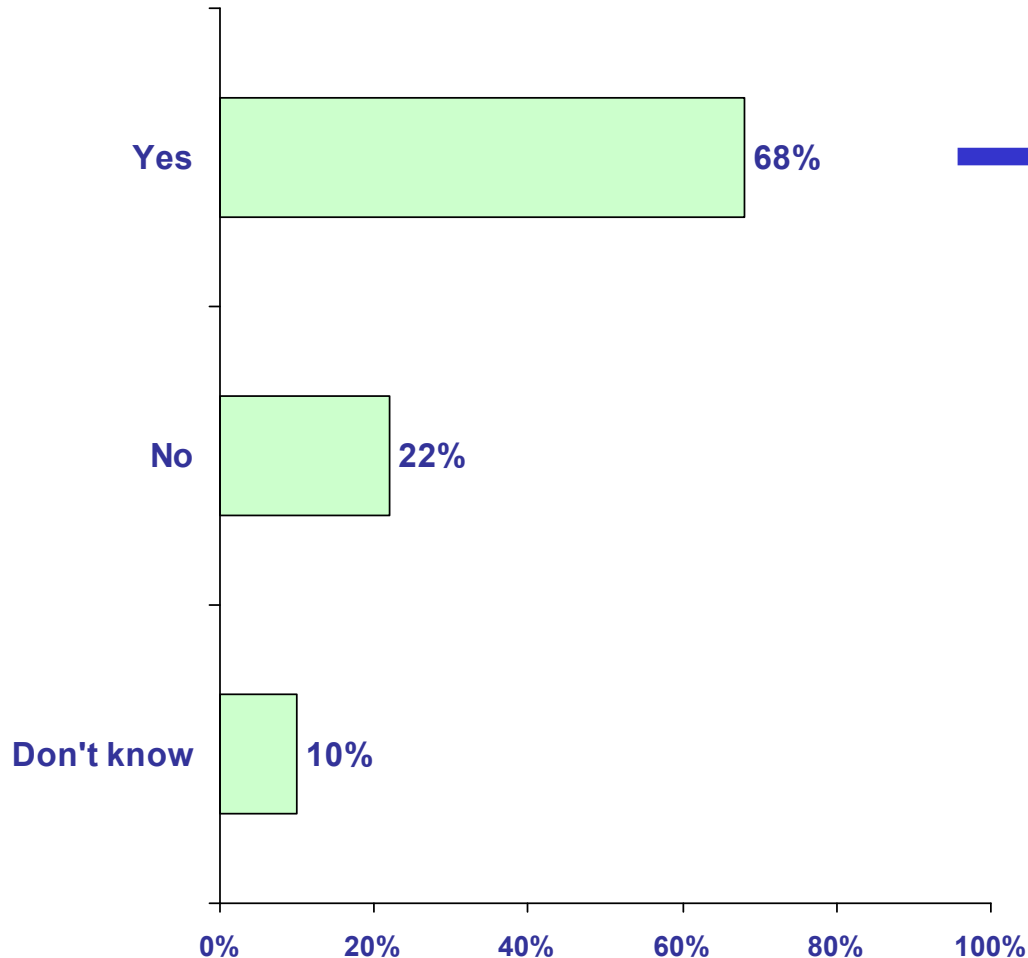


- The chart below depicts *relative value* of each service, according to whether or not a household member used that service in the last year. The centre point of the x and y axes have been designed to represent the mid-point of user and non-user ratings, respectively, and the dotted line indicates points at which the relative value to users and non-users would be the same.
- Users of a service always give higher value ratings than non-users, but generally speaking, a given service's value relative to the other services tends to be perceived similarly by users and non-users alike. Services to new Canadians, which lies farthest from the dotted line, exhibits the biggest perceptual difference between groups, with non-users valuing it slightly more than users, relative to the other services shown.



# Whether the Public Library Should Provide Training on Information Technology\*

- A majority of Ontarians think that it is appropriate for the library to offer information technology training. Basic computer and Internet skills and training on how to access library resources were most often mentioned as the types of training the library could offer.
- Still, quite a few who were in support of the library offering IT training either couldn't describe what that training should entail or suggested that it would be good for people other than themselves.



## Training that Could Be Offered

	2010
Basic computer/internet skills	40%
How to access library resources	16%
Research skills	9%
For seniors/older people	7%
For kids/students	5%
Word processing/Excel/Powerpoint	5%
Job search/job-related/resumes	3%
Anything/anything useful (unspec.)	3%
Other	8%
Don't know/can't think of anything	17%

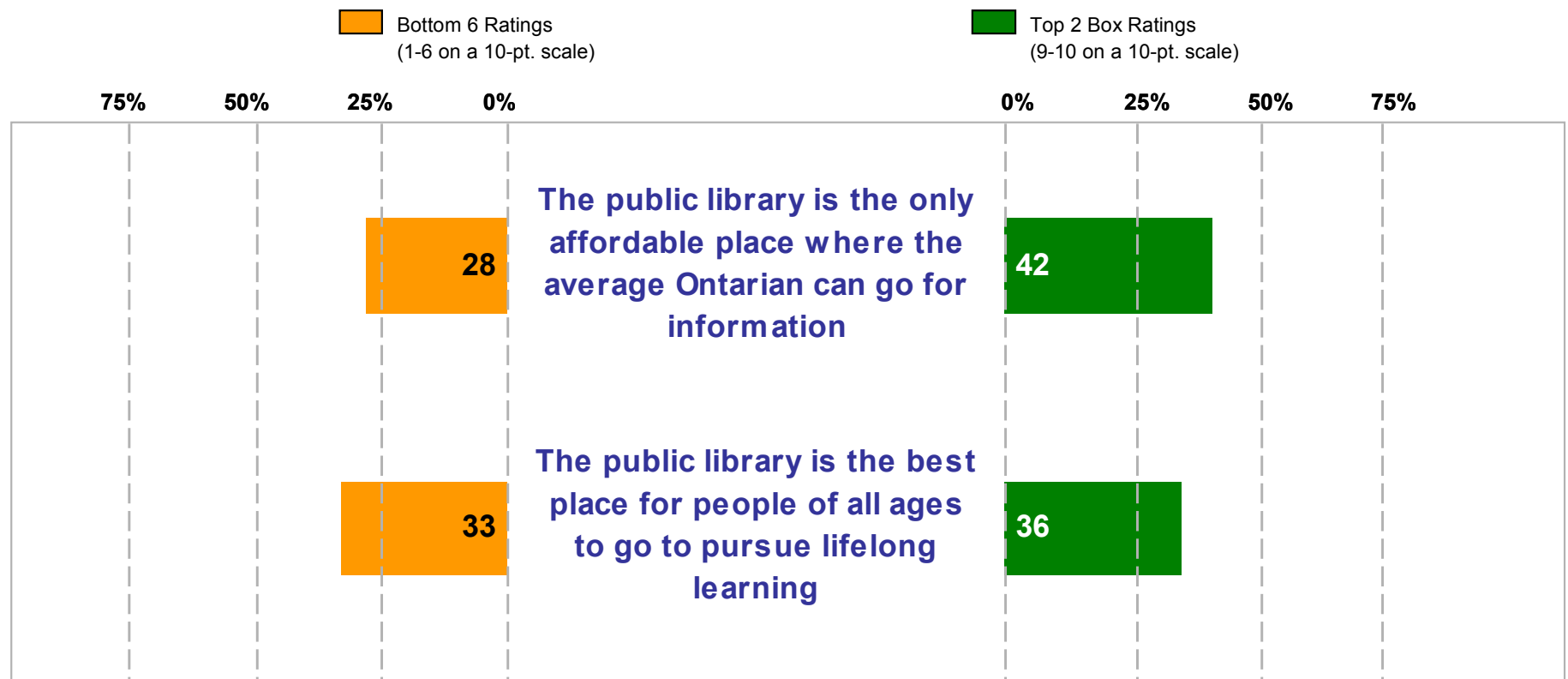
Q.13a/b

Base: All respondents (2010 - 1100); those who say the public library should provide training on information technologies (2010 - 753).

\* Change of wording in 2010 makes comparisons to earlier data invalid.

Note: Table contains mentions of 3% or more only. May total more than 100%, due to multiple mentions.

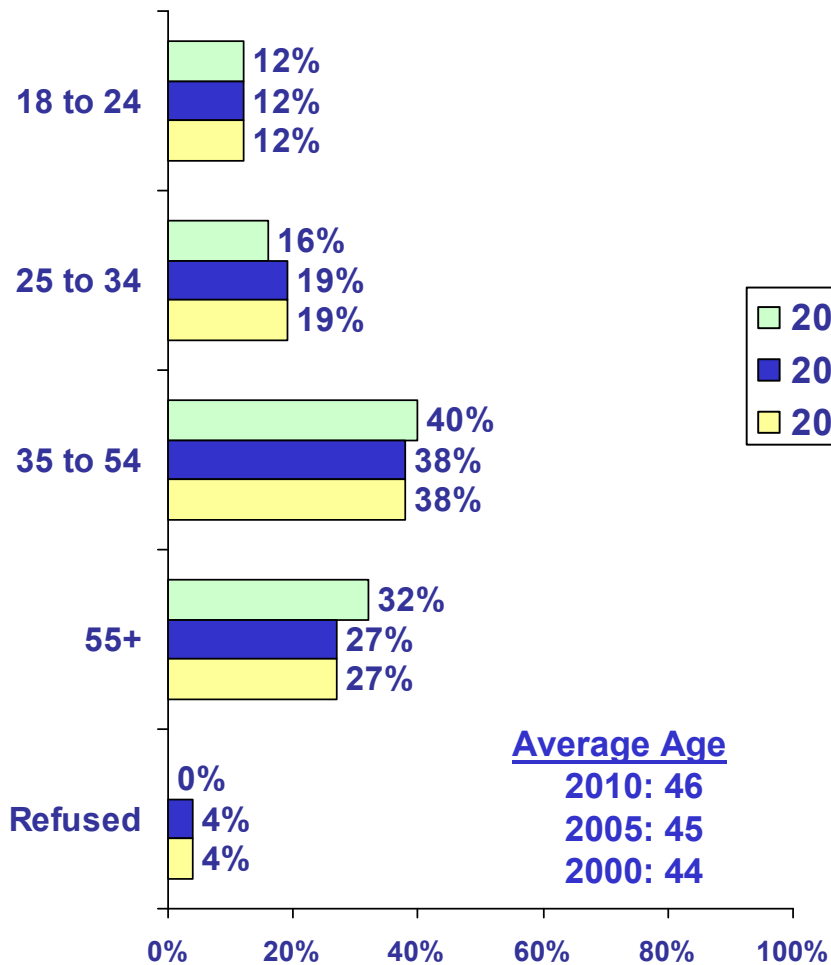
- Of the potential positioning statements that were tested with respondents near the end of this year’s survey, there was stronger endorsement of the public library being an affordable place for the average Ontarian to go for information than for the library being the best place for people of all ages to go to pursue lifelong learning.
- It should be noted that, for testing purposes, extreme versions of the statements (with words like *only* and *best*) were used. This may have been responsible for some of the lower ratings.



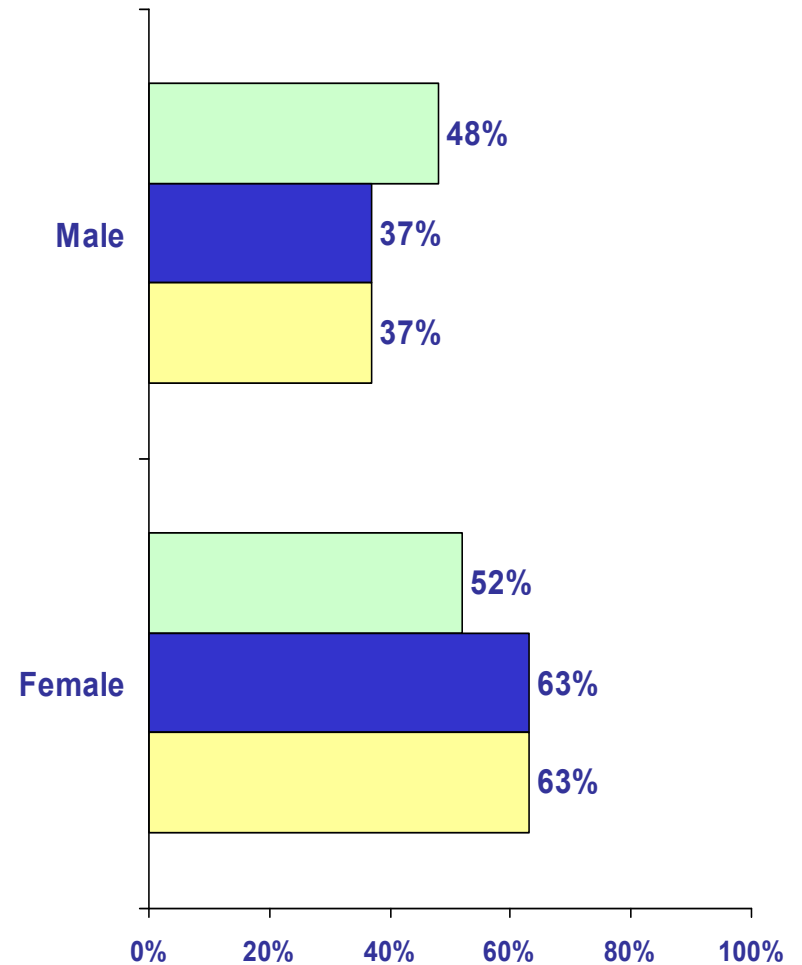
- In 2010, the future outlook for the library is slightly less optimistic than was the case in the past, yet more Ontario residents are still inclined to place the library at the top of the list of municipal tax-supported services than at the bottom.
- Unfortunately, those who are most positive about the future of the public library represent the library's older and less progressive clientele.
- Across the entire population, the library's traditional role of lending materials, housing a reference centre, and lending assistance in finding information are still the most used and valued of the services it offers.
- Early literacy programs, study areas, and local history collections are also valued, but to a slightly lesser degree; usage and perceived value of other services the library offers remain substantially lower.
- There is strong support for the library offering information technology training, but actual take-up rates for this type of service remain uncertain.
- Positioning the library as an affordable place where Ontarians can go to get information may have some merit.

# DEMOGRAPHIC PROFILE OF RESPONDENTS

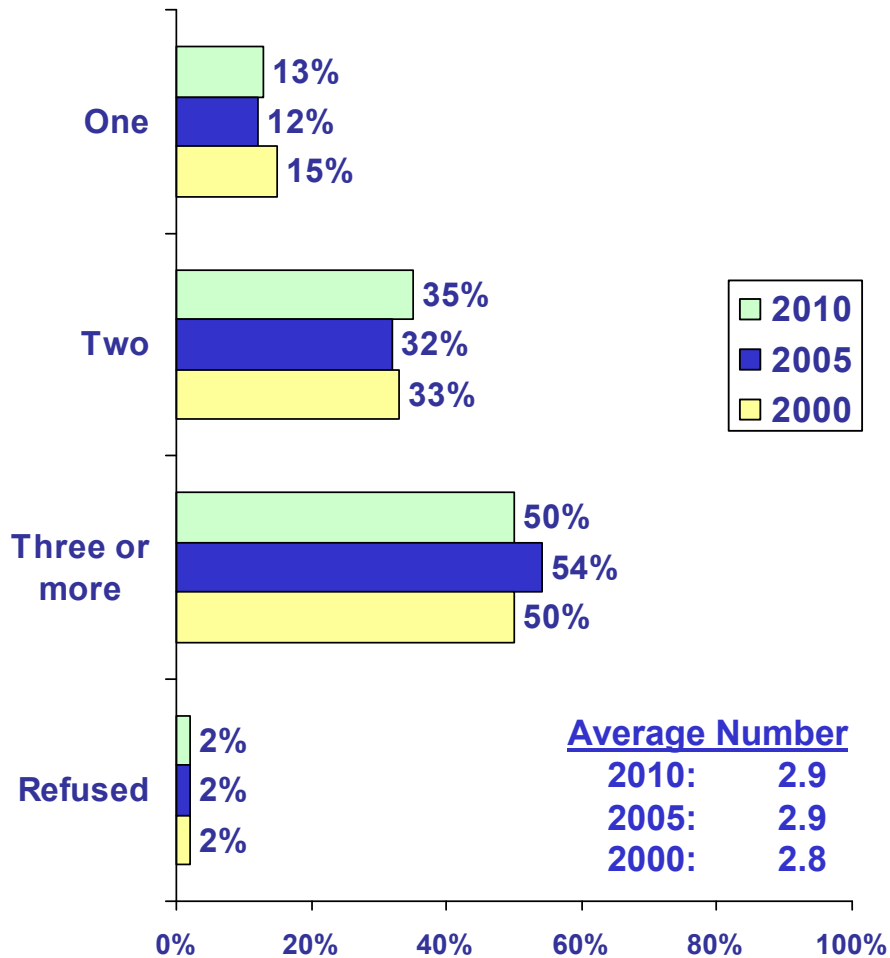
## Respondent Age



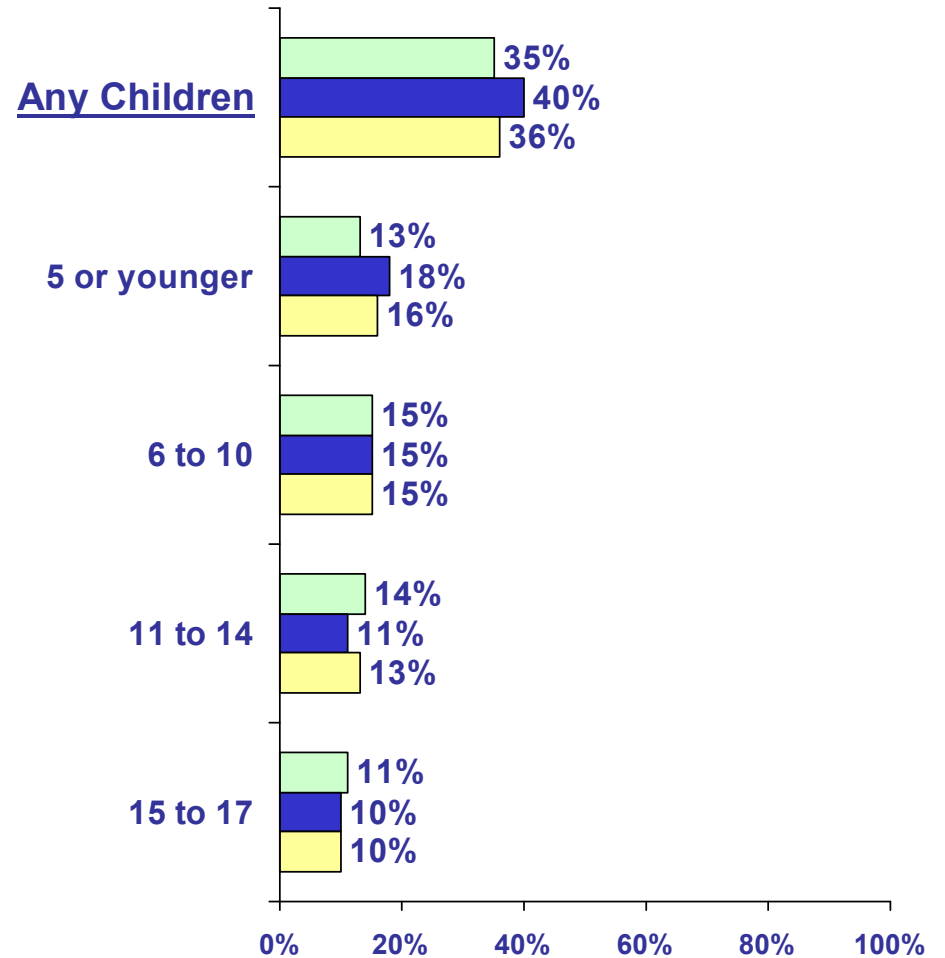
## Gender



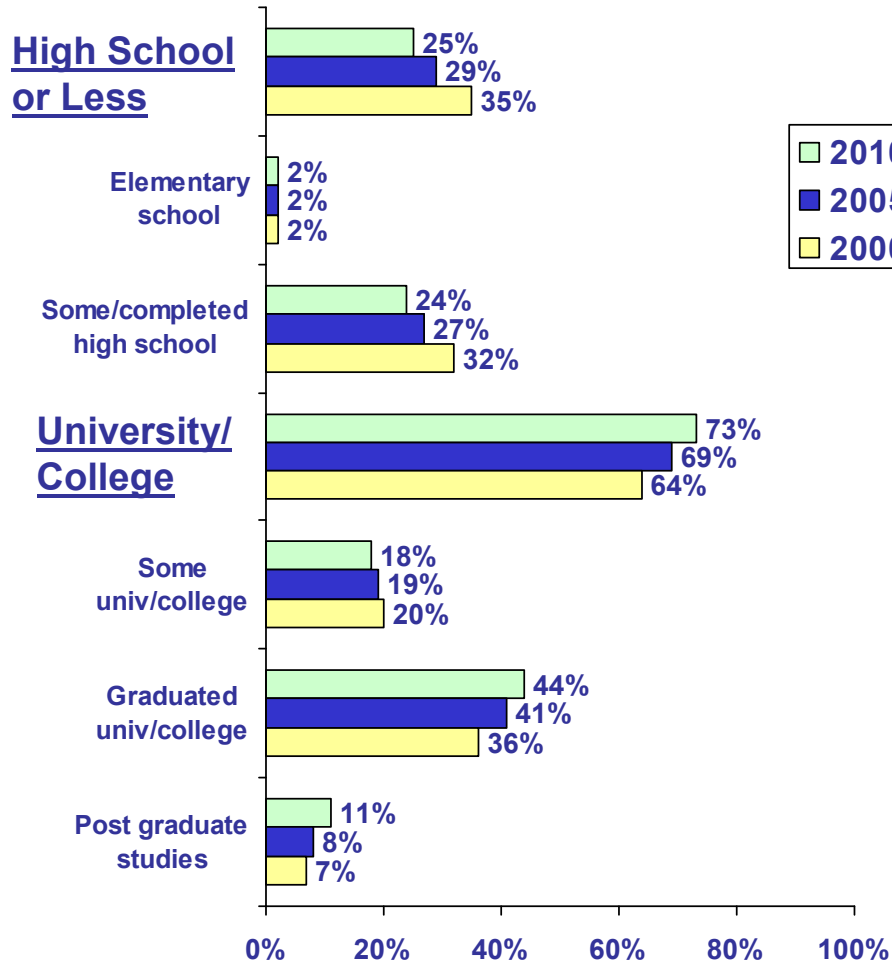
## Number in Household



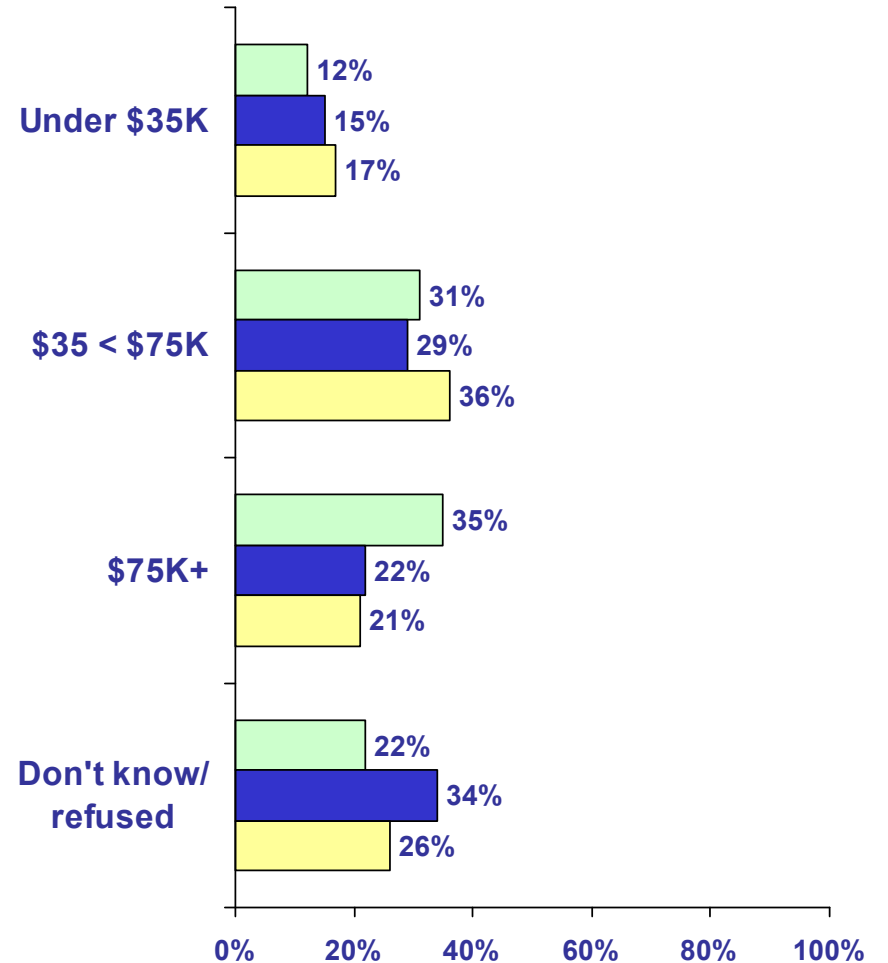
## Presence of Children in Household



## Education

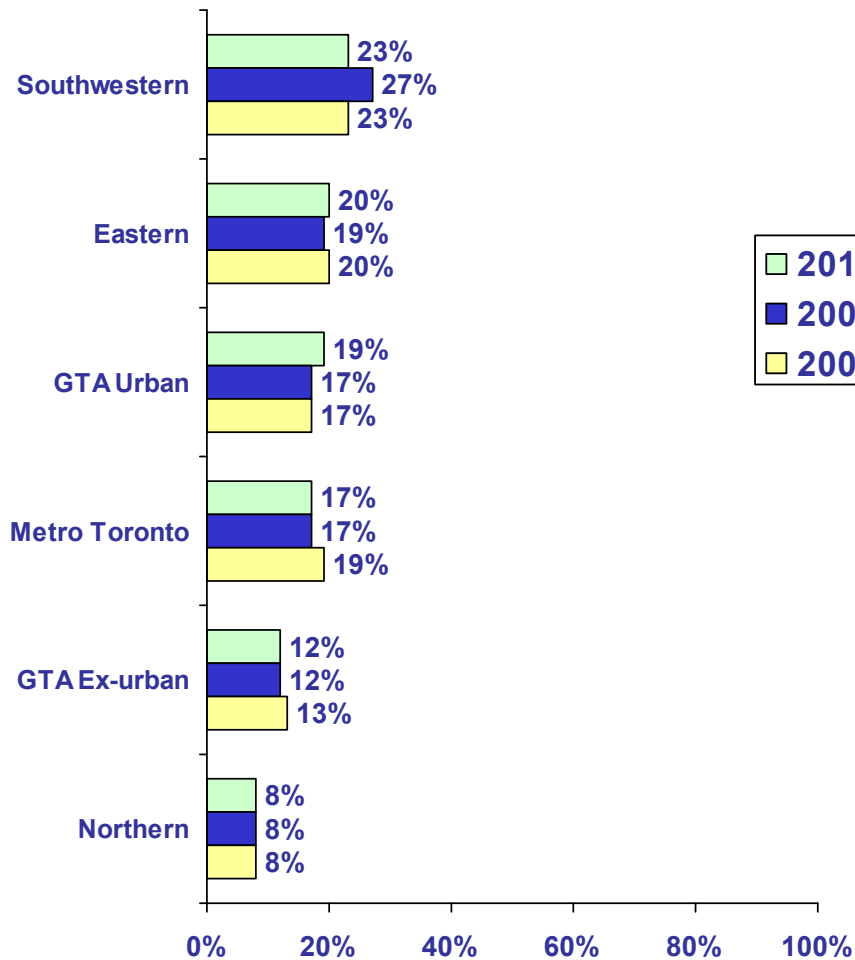


## Total Annual Household Income

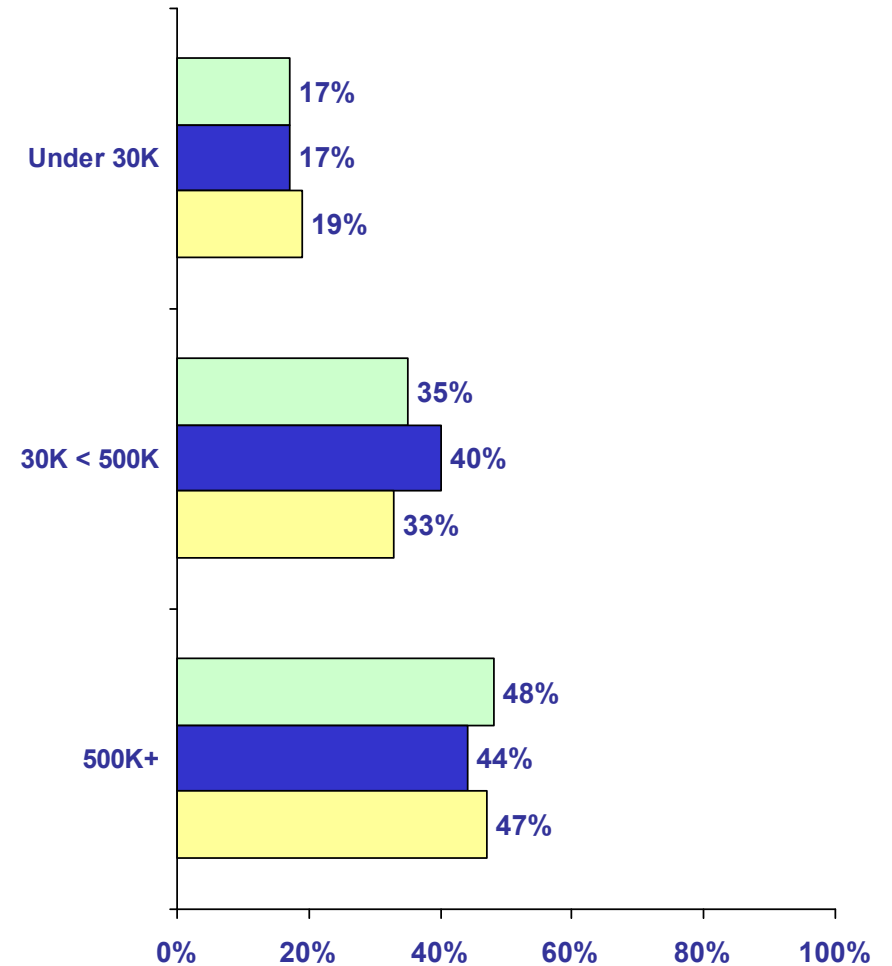


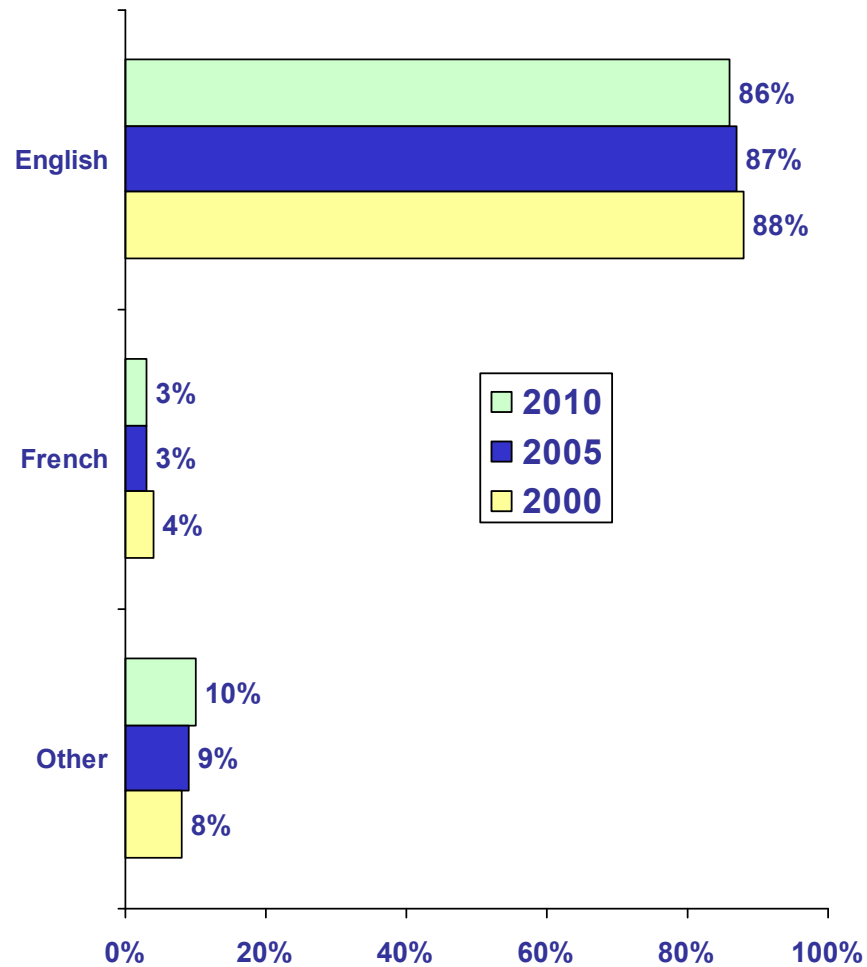


## Ontario Region



## Community Size







*The Federation would like to thank the  
Ontario Ministry of Tourism and Culture  
for helping to fund this research*