

Strategic Plan 2012 - 2015: Public and Visitor Survey Results

Date:	February 25, 2013
To:	Toronto Public Library Board
From:	City Librarian

SUMMARY

The purpose of this report is to provide a summary of the results of two surveys undertaken by Toronto Public Library (TPL) in October and November 2012: a hybrid online/telephone survey with a random sample of Toronto residents conducted by The Strategic Counsel; and an in-library survey of users. The surveys were part of the consultation strategy for the Library's new Strategic Plan 2012 - 2015.

TPL is seen to be an integral and valued service in Toronto communities. Survey results demonstrate high levels of usage and satisfaction with Library services: 72% of the adult population of Toronto accessed Library services in the past year and 97% of those who used the service were satisfied with the overall quality of Library service in Toronto; 92% of residents, including users and non-users, indicated that public libraries are an important resource for the community.

TPL fulfills its mission to provide *free and equitable access to services which meet the changing needs of Torontonians* by providing a range of traditional and new services that are valued and used by a very broad cross section of Toronto residents.

Key findings from the surveys show:

- Use of e-books is a potentially large and growing market for the Library;
- There are few complaints about Library service, the only issues are a desire for more computers and e-books to download; wireless service is currently seen as satisfactory;
- Satisfaction with staff and Library services are high and relatively stable over time;
- The Library is seen as providing high-quality, relevant and important service in Toronto communities;
- Visitors typically undertake a wide variety of activities, but browsing and borrowing Library materials remain major activities.

Survey results informed the development of the Strategic Plan 2013 Work Plan and will also influence future initiatives. Specific strategies address increased promotion and outreach to non-users and service improvements where indicated.

FINANCIAL IMPACT

This report has no financial impact beyond what has already been approved in the current year's budget.

The Director, Finance and Treasurer has reviewed this financial impact statement and is in agreement with it.

DECISION HISTORY

The Toronto Public Library Board approved conducting a survey of users and non-users as part of the consultation strategy for the Strategic Plan as outlined in the report *Strategic Planning Steering Committee: Strategic Plan 2012 - 2015: Consultation Plan*: <http://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2012/jan30/14.pdf>

COMMENTS

Toronto Public Library has conducted three city-wide surveys of users and non-users in 2001, 2006 and 2012 to benchmark and track Library usage in the context of newly released Census results for Toronto and to inform the development of the Library's strategic plans. An in-library survey of users was conducted in 2001 and again in 2012 to understand impressions of Library service immediately after use.

Methodology and Goals

In 2012, two surveys of adults 18+ were undertaken by the firm, The Strategic Counsel on behalf of Toronto Public Library: a hybrid online telephone survey and an in-library survey of TPL users.

The 2012 hybrid online/telephone survey introduced an updated methodology to ensure as comprehensive a sample as possible. A random sample of Toronto residents, including both Library users and non-users, was recruited through a telephone interactive voice response system where participants were given the option of participating online or via telephone. This was a change from the telephone-only survey conducted in 2006.

The in-library survey was conducted at two research and reference, four district and fourteen neighbourhood branches. Users were randomly selected while exiting the library during a range of open hours and given the option of completing the survey on a laptop or paper with accessible options available as needed. The in-library survey focused on users' experience using the Library that day, providing a different lens through which to understand usage and satisfaction levels.

Both surveys assessed:

- awareness and usage of Library services;
- attitudes towards Toronto Public Library and the services offered;
- interest in services offered by the Library;
- satisfaction with Library services;
- awareness of, and likelihood of, giving to the Toronto Public Library Foundation;
- attitudes towards new revenue streams for the Library.

Survey results informed the development of the Strategic Plan 2013 Work Plan with initiatives to address service development, communication, marketing and outreach where indicated.

Key Findings

Findings reported below are taken from the hybrid online/telephone survey and included both users and non users, with findings from the in-library survey as appropriate.

Usage of Library Services

Overall usage of Library service is stable and online access is increasing

- 72% of the adult population of Toronto used Toronto Public Library services in the last year, 67% report visiting a branch, 38% access online and 20% access by phone; over half of those accessing a library in the last year did so by more than one channel
- TPL is used by a broad cross section of the public; when compared to the 2011 Census results, Library users tend to be in the 25 - 44 age group with college or post secondary education; the median income of TPL users is lower than non-users
- 44% of the adult population are frequent or heavy users of Library branches as defined by 11 or more visits in the last year
- 45% of those who report taking a child to the Library do so at least two or three times per month;

Awareness of Library Services

Awareness of specific Library services varies greatly and is especially notable regarding e-books to download

- Both users and non-users report relatively high awareness of traditional Library services, including collections (bestsellers, DVDs and CDs to borrow), and computers in Library branches
- There is also fairly high awareness among users of programs for adults on a variety of subjects and interests; awareness among non-users is fairly low (36%), but non-users express some interest in Library programs and special events
- 48% of users and 24% of non-users are aware the Library provides e-books highlighting both that it is a new service and a new opportunity for the Library
- Among non-users there is relatively low awareness of access to e-books through the Library, ability to place holds online, programs offered for adults, wireless service, and meeting room space for rental

Services used in Library branches

Visitors use libraries for a variety of purposes, but borrowing continues to be a major service

- Visitors to Library branches use a wide variety of services, but browsing, borrowing, returning, or renewing Library materials continue to be major reasons to visit a branch
- One in five Torontonians report using a library to validate information they found on the internet
- Among those under 35 years of age, use of the Library for studying is extensive

E-books

Use of e-books is potentially a large and growing market for the Library, but is influenced by age

- Library users under the age of 54 are much more likely to access books in electronic format than the general public (30%)
- Users who report that they are at least somewhat likely to start reading e-books in the next year see the Library as a natural source; current e-book readers are interested in downloading books from the Library's website
- 52% of Library visitors report more technical support in using e-books from the Library would encourage more use
- 28% of those using e-books indicated that making e-books easier to download and increasing the range of titles available would have an impact on their use of this service

Usage of Computers/Wireless

One third of Library visitors used a Library computer while one in seven used their own laptop

- 35% of Library visitors used a Library computer versus 14% who brought their own laptop
- Among Library visitors, 53% accessed the Library's website, 56% used a Library computer, 28% used the wireless service
- Searching the online catalogue is the primary reason for using Library computers, but use of e-mail, word processing and social media is increasing

Usage of the Library Website

The primary reason for accessing the website is to search the catalogue

- Primarily, users of the Library's website search the catalogue (76%), find out about TPL's hours, locations and services (63%); place items on hold (55%) or accessed their customer record (43%); 14% of website users reported downloading an e-book

Satisfaction and Attitudes towards Library service

Satisfaction with Toronto Public Library service is high and stable

- 97% of those surveyed are satisfied with the overall quality of Library service in Toronto
- 95% are satisfied with the attractiveness of cleanliness of the branch they use

- 92% of those surveyed are satisfied with the helpfulness of Library staff
- 84% are satisfied with the Toronto Public Library website
- There was less satisfaction with the ease of downloading e-books, and the range of e-titles

Attitudes toward Revenue Sources / Awareness of Fundraising

Of proposed new revenue streams, the sale of e-books is the most acceptable, followed by advertising; the introduction of paid parking was considered not acceptable by the majority of responders

- There are low levels of awareness of Toronto Public Library's charitable status
- The sale of e-books appears to be the most acceptable source of new funding: 79% of users thought it was acceptable to sell e-books on the Library's website; 65% think having advertising in libraries, in Library publications and on the website is acceptable; 63% think introducing paid parking is not acceptable

Attracting Non-Users to the Library

To attract non-users to the Library, areas with higher interest and lower awareness could be promoted, with the percentage of non-users interested in each service included below:

- E-books to download (45%);
- Books, CDs and DVDs to borrow (41%);
- Free use of computers in every branch (39%);
- Programs for adults on a variety of subjects (38%);
- Specialized programs, including job search or starting a new business (36%).

CONCLUSION

Toronto Public Library is viewed by Toronto residents as a relevant and trusted community information resource with an important role in supporting literacy. By incorporating strategies to improve service and build usage among Toronto residents, the Library will strengthen its contribution to Toronto communities and fulfill its mission to provide *free and equitable access to services which meets the changing needs of Torontonians.*

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SIGNATURE

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