List of participants: Amsterdam, Barcelona, Berlin, Boston, Bremen, Brisbane, Brooklyn, Bucharest, Budapest, Charlotte Mecklenburg, Cleveland, Columbus, Copenhagen, District of Columbia, Dresden, Dublin, Düsseldorf, Edmonton, Gold Coast, Halifax, Hannover, Harris County, Helsinki, Hong Kong, Indianapolis-Marion County, Jacksonville, Las Vegas-Clark County, Los Angeles, Lyons, Manchester, Memphis, Milwaukee, Montréal, New York, Oklahoma, Oslo, Ottawa, Philadelphia, Prague, Queens, Riga, Rotterdam, San Francisco, San Jose, Seattle, Shanghai, Singapore, Stockholm, Tallinn, Toledo-Lucas County, Toronto, Toulouse, Utrecht, Vancouver, Vienna, Vilnius, Yarra Plenty, Zagreb, Zurich.
Survey Goals

Accurate and Current = Reliable and Comparable

“Correct, reliable and comparable data are crucial for the value and usefulness of library statistics”

*IFLA Library Statistics Manifesto*
Library statistics and Benchmarking

Effective Benchmarking makes a powerful advocacy and planning tool:

- Effective peer comparisons and benchmarking
- Advocacy tool: social, cultural & economic values of libraries
- Evidence-based data to demonstrate returns for funding investment and basis for internal evaluation & planning
- Foundation for qualitative statistical data when combined with local demographics, social and economic statistics
- International library data are powerful indicator of global economy and cultural/social trends
- Transition of libraries to address user needs in the digital age
Summer of 2011
- Web-based survey tool enhanced with new functionality
- Templates for building customizable benchmarking reports were created
- Reporting functions expanded to allow different report types and graphic representations of selected data
- Continued technical support from Counting Opinions

Fall of 2011
- Survey updated with new questions on electronic services and library programs to reflect the increasing volumes of electronic activities and programming in libraries
The Participants

Record participation from 59 libraries

- 25 countries
- 4 regions
  - Asia (3 libraries)
  - Australia & Oceania (3 libraries)
  - Europe (26 libraries)
  - North America (27 libraries)
- 1 first-time participant
- Return of 2 long-time participants: Lyons and Shanghai
# Table listing 2010 survey participants

| 2010 Survey Participants | | | |
|--------------------------|--|------------------|--|------------------|
| Amsterdam Public Library | Barcelona Libraries Consortium | Berlin Public Library | Boston Public Library |
| Bremen Public Library | Brisbane City Council Library | Brooklyn Public Library | Bucharest, Metropolitan Library of |
| Budapest, Metropolitan Ervin Szabó Library | Charlotte Mecklenburg Library | Cleveland Public Library | Columbus Metropolitan Library |
| Copenhagen Public Libraries | District of Columbia Public Library | Dresden Public Libraries | Dublin City Libraries |
| Düsseldorf Public Libraries | Edmonton Public Library | Free Library Of Philadelphia | Gold Coast City Council Library |
| Halifax Public Libraries | Hannover Public Library | Harris County Public Library | Helsinki City Library |
| Hong Kong Public Libraries | Indianapolis-Marion County Public Library | Jacksonville Public Library | Las Vegas-Clark County Library District |
| Los Angeles Public Library | Lyons Public Library | Manchester City Council Libraries | Memphis Public Library and |
| Milwaukee Public Library | Montréal Public Library | New York Public Library | Oklahoma Metropolitan Library |
| Oslo Public Library | Ottawa Public Library | Prague, The Municipal Library of | Queens Borough Public Library |
| Riga Central Library | Rotterdam Library | San Francisco Public Library | San Jose Public Library |
| Seattle Public Library | Shanghai Library | Singapore, The National Library | Stockholm Public Library |
| Tallinn Central Library | Toledo-Lucas County Public Library | Toronto Public Library | Toulouse Public Library |
| Utrecht Public Library | Vancouver Public Library | Vienna Public Library | Vilnius City Library |
| Yarra Plenty Regional Library | Zagreb City Libraries | Zurich Pestalozzi Library | |

* First-time participant
Key Findings of 2010 Survey

Between 2009-2010

- Circulation per capita rose 30.8%
- Use per capita (circulation, reference requests, visits, virtual visits) slightly dropped 2.5%
- Both physical and virtual visits per capita declined (16.8% and 19.1%)
- Information requests continued to drop by 23.2%
- Registration per capita decreased by 3.8%
- Weekly hours per capita slightly increased by 0.54%
- Increased service efficiency: Staffing and performance ratio improved in both population per FTE (9.6%) and circulation per FTE (43%)
Key Findings of 2010 Survey (Cont’d)

Between 2009-2010: Significant impacts of global economy on libraries

• Over half (31/59) of survey participants reported staffing reductions (2 libraries reported over 40% reduction in staff expenditures per capita)

• About half (28/59) reported funding cuts (1 library reported 36% reduction in operating expenditures per capita)

• Enhanced service performance and efficiencies:
  - Circulation per staff (FTE) surged 43%
  - Population per staff (FTE) rose 9.6%
  - Hours per capita increased by 0.54%
Key Findings of 2010 Survey (Cont’d)

**Major trends in library use and library services:**

- Demand for library service evolves in economic hard times with a strong rebound in circulation but decline in information requests and visits
- Value of libraries redefined and expanded in the new information and digital age
- Focus on efficiencies and accountability impacts developments in library benchmarking and targeted measures
- Global economic uncertainty and increased competition for funding result in reduction in library resources and staffing for many libraries
- Library’s roles and services continue to evolve with growing use and demand for digital content (ebooks) and services increasingly shaped by emerging technologies
Hot Topics: Electronic Services

78% (46/59) participation rate from 46 libraries:

- Electronic materials accounts for under 1% of all circulation, but eBook circulation represents 21.7% of all electronic materials.

- Circulation Turnover Rate comparisons:
  - **Electronic materials**: 0.82 (circulation: 6.804 M, holdings: 8.256 M)
  - **eBooks**: 2.1 (circulation: 1.476 M, holdings: 0.699 M)
  - **All materials**: 3.29 (circulation: 1.476 M, holdings: 0.699 M)

- Levels of participation in Hot Topics varies: highest participation in Social Media measures.

- Strong library presence in social media: Facebook (89% -- 41/46), Twitter (80% -- 37/46), Blogs (76% -- 35/46), Photosharing (64% -- 27/42)

- Among the different social media, library blogs generate the most activity (including visits, clickthru, blogs- generated comments): a total of 7.366 M from 15 participating libraries.
Hot Topics: Electronic Services (Cont’d)

78% (46/59) participation rate from 46 libraries:

- Average expenditure on electronic materials: 7.7% of total acquisition expenditures (5 libraries spent over 20%)
- Electronic information requests: 3.26% of all information requests, mostly via emails, followed by chat, then mobile texting (6 libraries)
- Half (29/59) of the survey participants include electronic downloads in their circulation statistics
- 25% (15/59) of libraries provide streaming of materials

*** Total social media activities (10.9 million) = 18.3% of reference requests (59.52 million)
79.7% (47/59) participation rate from 47 libraries:

- 466,633 programs delivered: 80% of libraries provide an age-breakdown (*Children and teens: 55.8%, *Adult and teens: 44.2%)
- An average of 5 programs are available per 1000 population (1 library offers over 39 programs per 1000 population)
- Over 28 million program attendance: 28% provides an age-breakdown (*Children and teens: 58.8%, *Adult and teens: 41.2%)

*** Program attendance (28.98 million) = almost ½ of reference requests (59.52 million)

* Survey definition on age groups: Children: 0-14, Adult: 15 and over
Five Year Trends

2006 is a pivotal year of growth for many libraries when internet-based service was introduced

From 2006 to 2010:

- Use per capita rose 6.4% in 5 years after a phenomenal 80% growth from 2005 to 2006
- Circulation per capita surged 35.7% since 2006 after recovering from a sharp decline of 31% in 2007
- Virtual visits per capita increased 4.89% since 2006 with a tremendous growth in 2009
- Visits per capita dropped by 24% since 2006 after a sharp rise of 17% from 2005 to 2006
- Information requests (reference requests) per capita continued a downward trend: a 27.7% decline since 2006 with a slight recovery from a one-year drop of 45.5% in 2007
Five Year Trends (Cont’d)

From 2006 to 2010:

- Registration as percentage of population stabilized (less than 1% decline) since 2006

- Overall growth in library activities is matched by improved service and staffing efficiency:
  - circulation per FTE jumped 62.9%
  - population per FTE increased by 19.95%. In 2010, each FTE served 494 more users than 5 years ago.

- Despite global economic uncertainty and funding reductions, libraries continue to enhance library services:
  - Weekly hours per capita almost doubled (85.6% increase) since 2006
  - Collections per capita increased 5% in 5 years
Overall Trends: Library usage

Library use per capita jumped 92% from 2005-2010 with a phenomenal growth from 05-06 when internet-based services were introduced in most libraries.


*For this survey, reference requests is aka information requests.
Overall Trends: Usage Type Comparisons

Comparison of Usage types from 2006-2010

Use per capita from 2006-2010

Source: IFLA 2010
Overall Trends: Shift in user pattern

In 2010, circulation rebounded in uncertain economy and comprised the highest percentage (43.8%) of overall library use.

**Shanghai’s large population (13% of total) and high circulation (36% of total) could have influenced the overall results.**
Traditional library usage

• Circulation per capita
  - Circulation continues to be a significant library activity, 2010 saw a strong rebound from a one-year drop of 31% in 2007. Between 2006 and 2010, there was a 35.7% growth.

• Collection turnover rate
  - A popular measure to show how often items in a collection are used. With the renewed interest in circulation, the turnover rate rose 29% since 2006.

• Reference requests per capita
  - Despite a significant one-year growth of 32% in 2009. From 2006 to 2010, there was a 27.7% decline in reference requests per capita.
Traditional library usage

Loans Per Capita
IFLA

Circulation Turnover Rate
IFLA

Information Requests per Capita
IFLA

Blue – above average
Red = below average
Electronic library usage: Collections

Electronic collections in libraries grew 10 times in 5 years:
both in per capita ratio (0.016 to 0.16) and as percentage of the total collections (0.58% to 5.74%)

Electronic Collection Per Capita
IFLA

Electronic Materials as a Percentage of Total Collection
IFLA

Blue – above average
Red = below average
In 2010, libraries offered 15% more internet workstations per capita than the year before. Since 2006, the number of internet workstations in libraries has more than doubled (116%).
Electronic library usage: Internet sessions

- Between 2006 and 2010, internet sessions per capita grew more than 3 times from 0.299 to 1.273
- Dramatic drop on internet use (76%) in 2010 impacted by one participant’s data inconsistency on internet sessions in 2008 and 2009 (2008--243.9 M, 2009--275.6 M, 2010--7.5 M)
- Studies confirm libraries as primary provider of free internet access in their communities
Increased Efficiency

Increased efficiencies:

• Service/staffing ratios
  
  In the past 5 years
  
  - performance ratio rose 63% in circulation per FTE
  - population per staff increased 20% (from 2,475 in 2006 to 2,969 users per staff in 2010)
  - staffing level reduced 16.3%
    
    2006, 1.04 FTE for 1000 registered users.
    2010, 0.87 FTE for 1000 registered users.

• Cost per use
  
  - Effective efficiency ratio currently available to libraries responding to all survey questions. A meaningful analysis of costing trend for the library community will only be possible with a full and consistent participation
  
  - Fluctuations in exchange rates for Euros could also impact calculations of costing trends
Future Directions

Next steps:

- New metrics for new services to ensure survey’s currency and values
- Participation commitments to ensure data integrity and comparability
- Enhancement of existing survey tool with user-friendly report functionality
- Ongoing funding to ensure sustainability of library data collection and survey efficiency
Future Directions: New metrics

Measure on **library use** to be redefined with new activities including:

- **Programming** (with sub-groupings for data analysis and performance management) – piloted in 2010 Survey
- **Social media activities** (reference service in the digital age) – piloted in 2010 Survey
- **Electronic circulation** – piloted in 2010 Survey
- **Electronic reference questions** (via emerging electronic platforms) – piloted in 2010 Survey

**The Hot Topics survey indicates the combined total of program attendance and social media activities represents a substantial volume -- about 2/3 (67%) of total reference requests**
Future Directions: Survey sustainability

- Engage a full and consistent participation in the IFLA Met Lib Survey for broader representation and meaningful trend analysis for the global library community
- Continuous refinement of survey tool as a planning and advocacy tool
- Ongoing funding to ensure survey sustainability and data currency
Future Directions: Trends to watch

• Library use evolves with new roles of libraries: as educator, information broker and hearth of the community

• Impacts of mobile technology on library use: mobile devices, apps and user expectations

• Information service redefined and evolved with emerging technologies: e.g. reader’s advisory via blogging and apps, library services and programs addressing digital literacy, reaching out to next generations of users via media-rich forum
Thank You

Contacts:  Elizabeth Glass  eglass@torontopubliclibrary.ca
          Kelly Yuen       kyuen@torontopubliclibrary.ca