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# TORONTO PUBLIC LIBRARY SURVEY OF TORONTO RESIDENTS

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DECEMBER, 2015

prepared by  
**FORUM RESEARCH INC.**

**PRINCIPLES OF  
STATISTICS  
M.G. BULMER**

**METHODOLOGY**

# Methodology

## Fieldwork Summary Statistics

### Fieldwork Overview

<b>Sampling Region</b>	<b>City of Toronto</b>
<b>Sampling Methods</b>	<b>Telephone and Online</b>
<b>Telephone Sample Size</b>	<b>n=603</b>
<b>Online Sample Size</b>	<b>n = 598</b>
<b>Response Rate</b>	<b>10.6%</b>
<b>Average Duration (Telephone)</b>	<b>20 min</b>



# KEY FINDINGS

## STRENGTHS

- Increased library visits since 2012
- Increase in overall library usage
- Increased usage of the library as a space to study and work
- Increased awareness of all library services, especially digital:
  - Access to e-books
  - Access to wireless internet
- Increased awareness of programming for adults
- High satisfaction with overall service quality
- High satisfaction with knowledge and helpfulness of library staff

DECEMBER, 2015





# KEY FINDINGS

OPPORTUNITIES FOR INCREASED FOCUS

- Grow usage through mobile channels
- Improve computer access and software on in branch computers
- Promote programs and services with lower awareness to targeted groups, e.g. entrepreneurs, job seekers
- Promote availability of recently published books and high-quality programs
- Non-users are interested in the free use of wireless internet
- Non-users are interested in the free use of library computers
- Grow fundraising awareness

DECEMBER, 2015

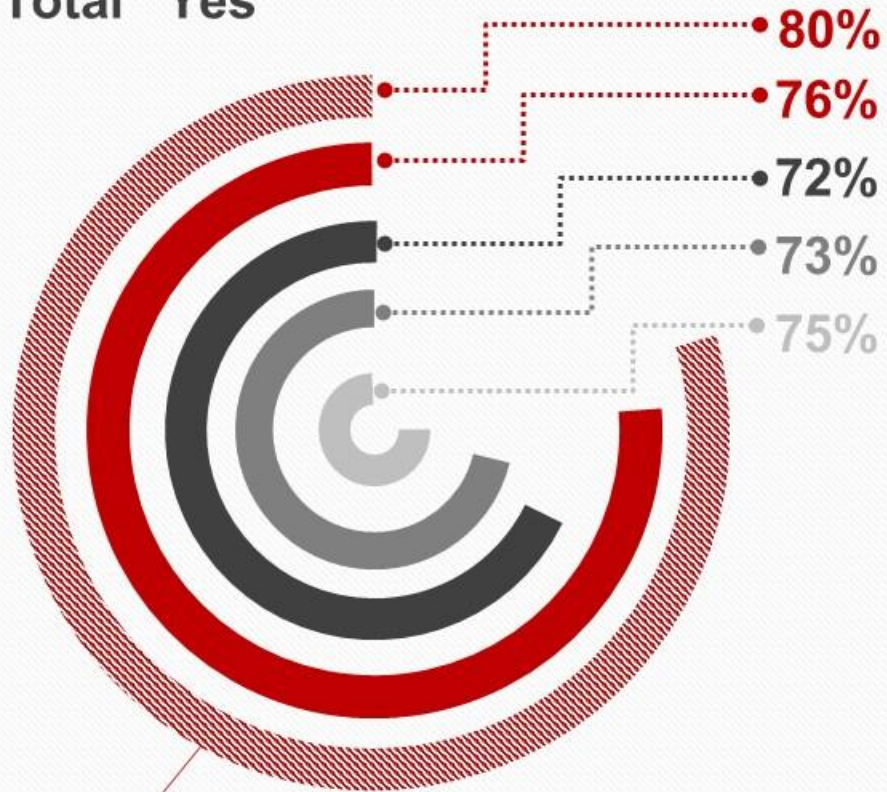


# ACCESS & AWARENESS

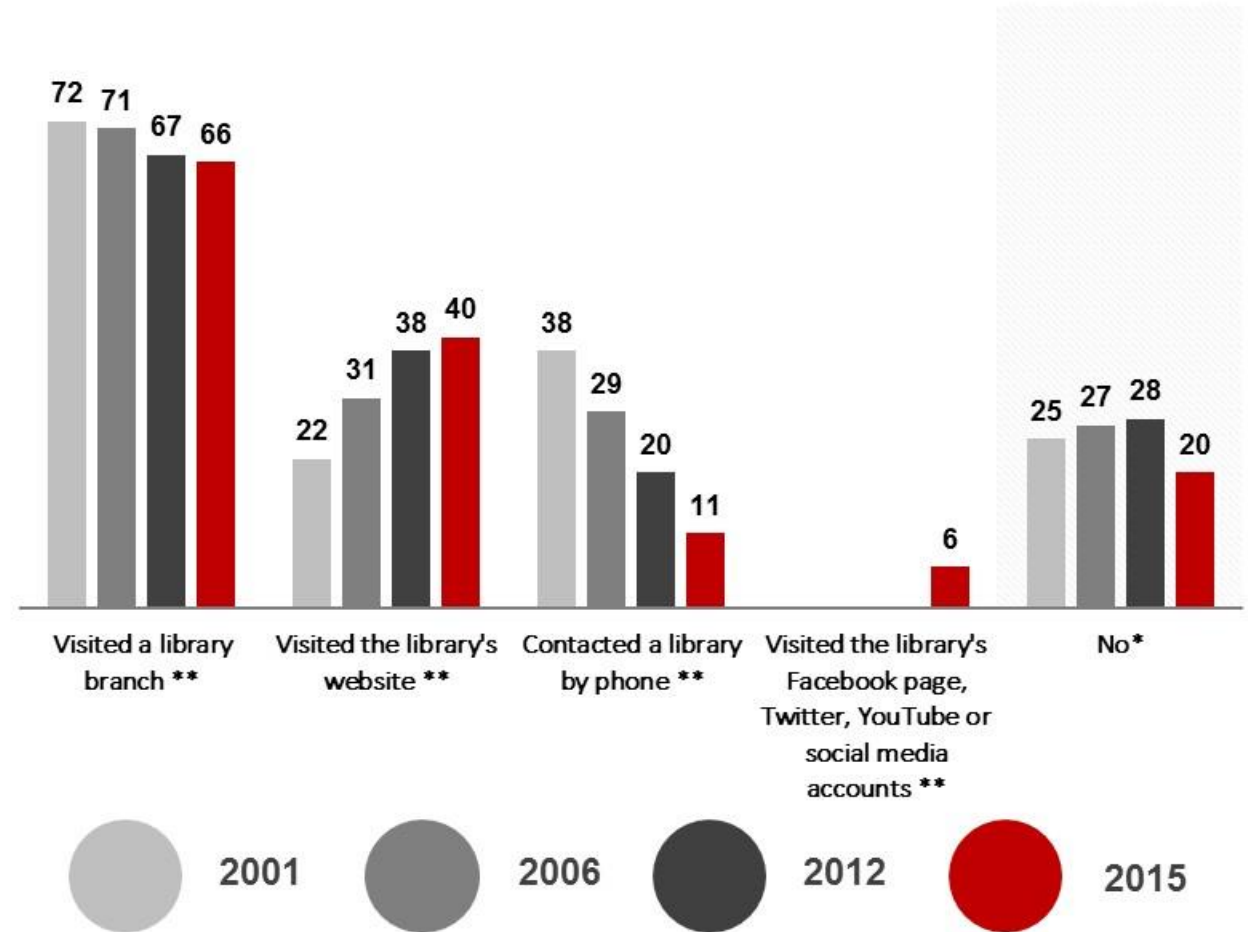
# ACCESS & AWARENESS

## Visiting the Toronto Public Library

Total "Yes" \*



Includes the 2015 addition of "Yes, visited the library's Facebook page, Twitter, YouTube or social media accounts" answer option



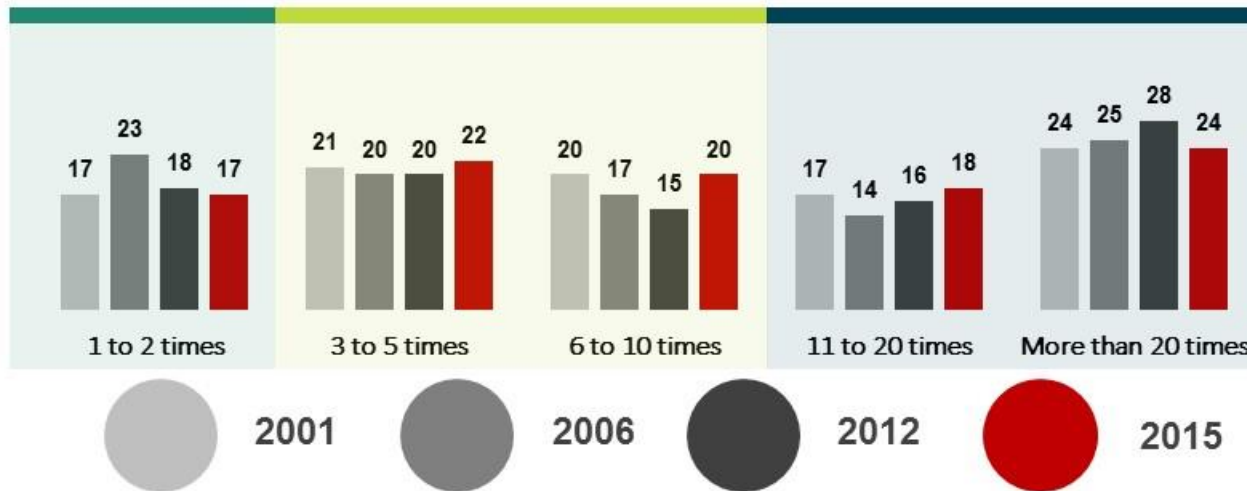
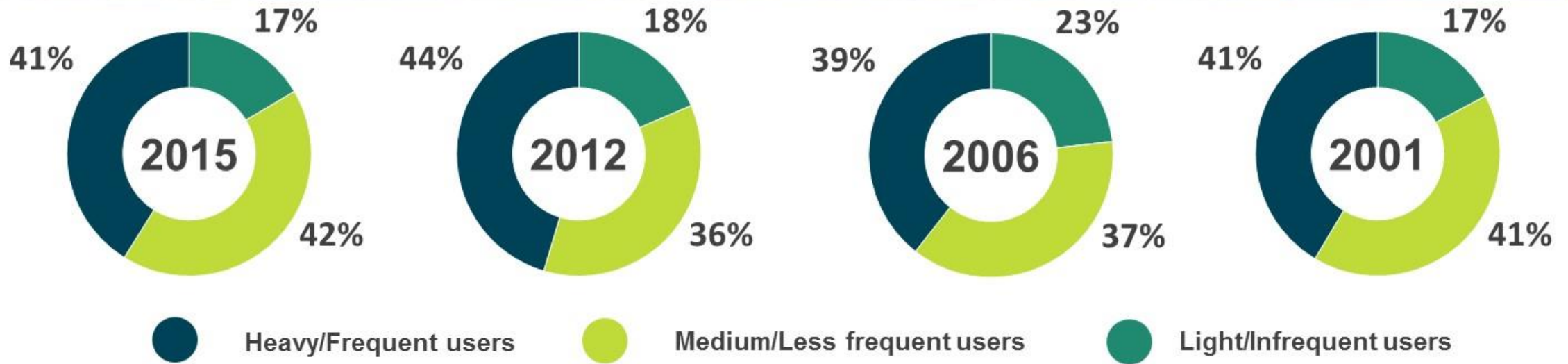
Q1 - In the past twelve months, have you visited a branch of the Toronto Public Library, accessed the library online, visited any of the library's social media sites or contacted the library by telephone? (Multiple answers accepted)

\* Percentage of total responses \*\* Percentage of total respondents



# ACCESS & AWARENESS

## Branch Visit Frequency



Q2 - Do you recall, how many times you have personally visited a Toronto Public Library branch in the past twelve months?

(Note: 2015 did not have an option to refuse/DK this question – instead asked for an estimate)

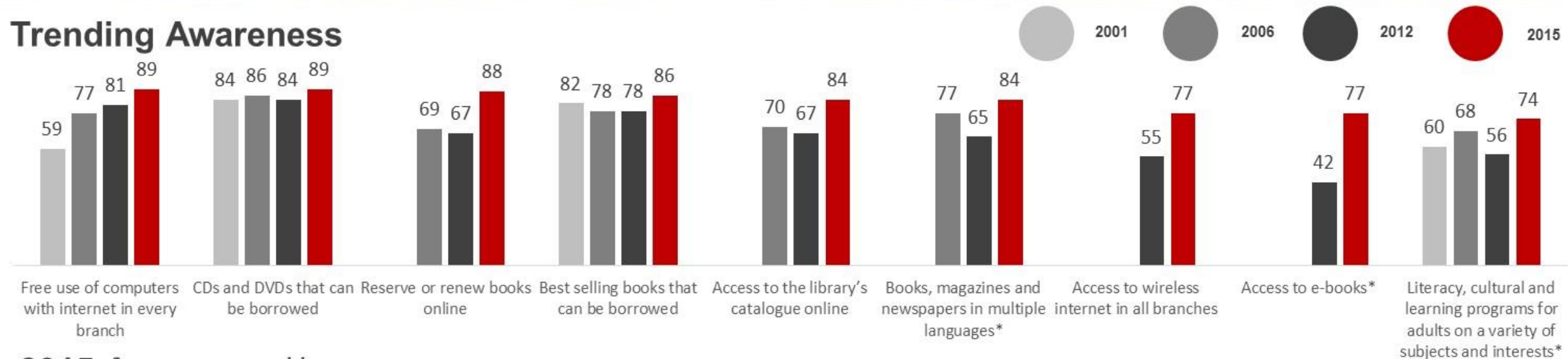
Sample: Branch visitors



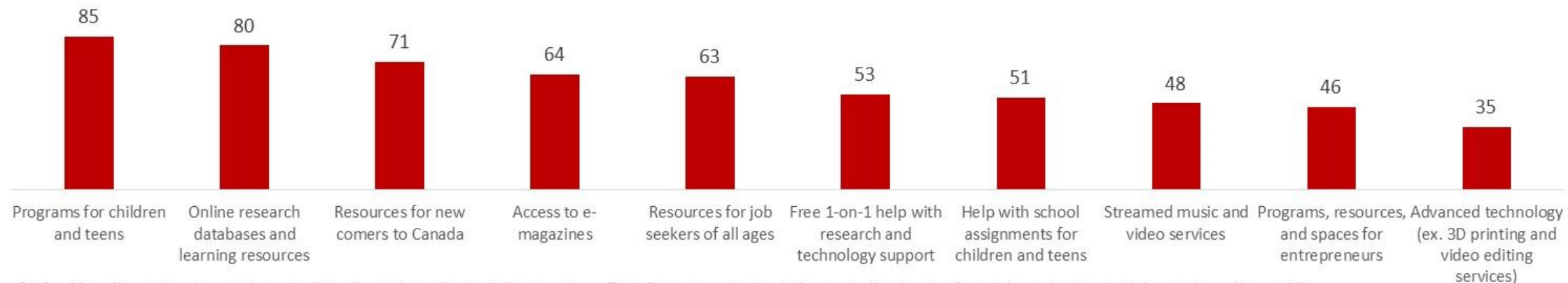
# ACCESS & AWARENESS

## Overall awareness of library services

### Trending Awareness



### 2015 Awareness\*\*



Q10 - Now I'm going to read you a list of services that a Library may offer. Can you please tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city. Simply tell me Yes or No for each of the following

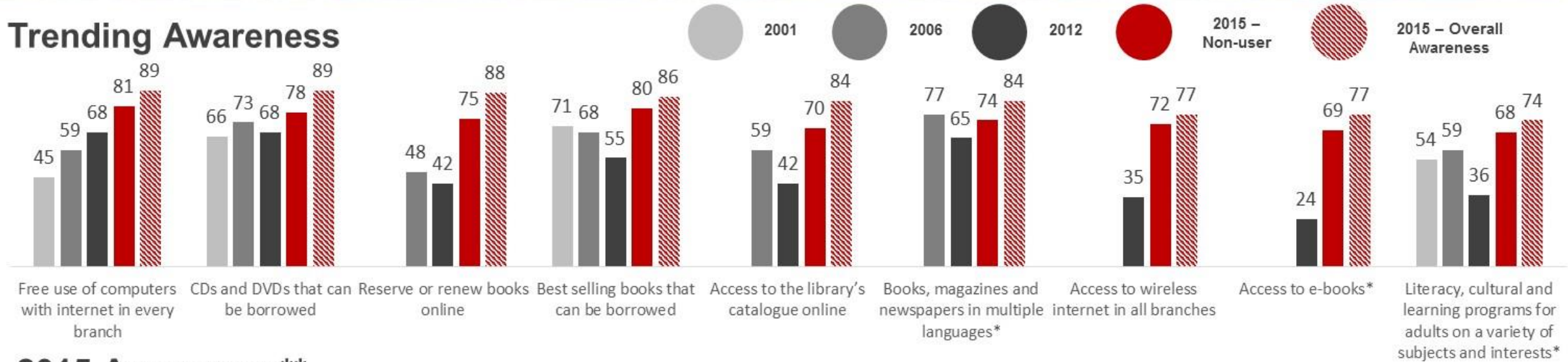
\* Question wording change \*\* New answer options for 2015

Sample: Full Sample (Unsure answers are included in the calculations – not visualized)

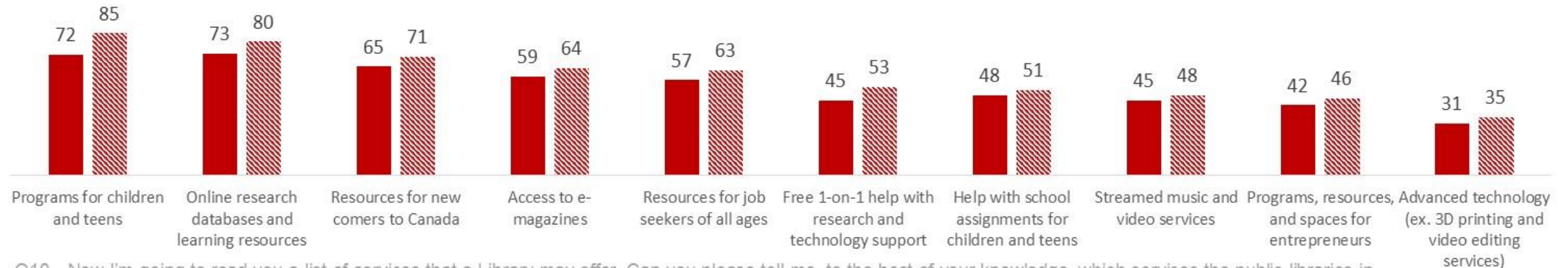
# ACCESS & AWARENESS

## Non-user awareness of library services

### Trending Awareness



### 2015 Awareness\*\*



Q10 - Now I'm going to read you a list of services that a Library may offer. Can you please tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city. Simply tell me Yes or No for each of the following

\* Question wording change \*\* New answer options for 2015

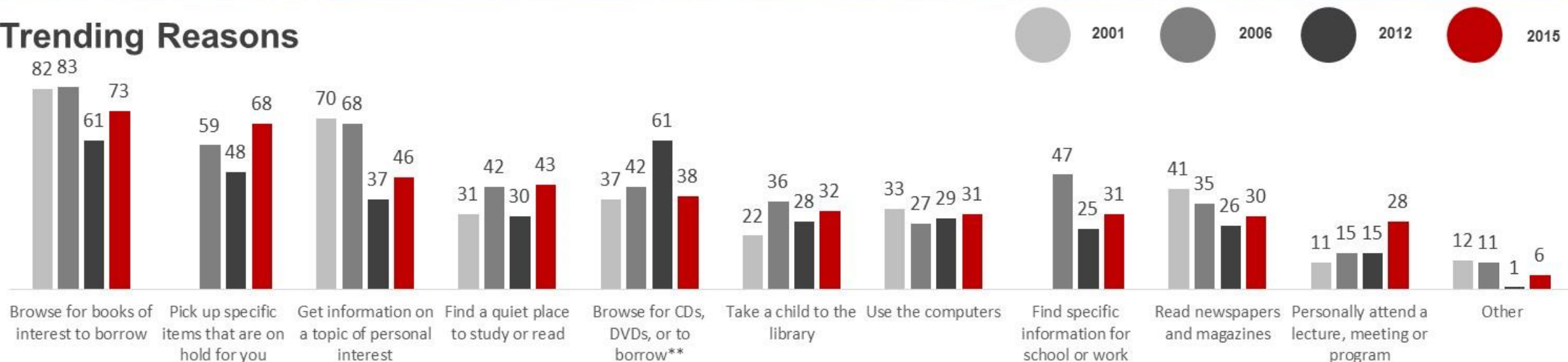
Sample: Full sample & Non-user sample (Unsure answers are included in the calculations – not visualized)



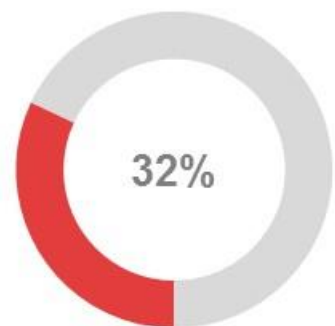
# ACCESS & AWARENESS

## Reason for visiting a library

### Trending Reasons



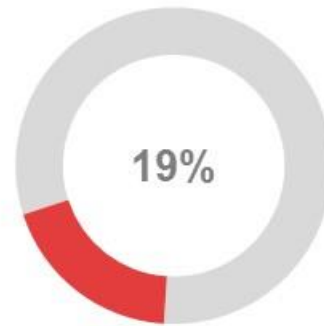
### 2015 Reasons\*



Use the Wireless Internet



Receive advice or consult with Library Staff



Meet with a group / have a meeting

Q12 - When you visit the library is this usually to... (Multiple responses accepted)

\* New answer options for 2015 \*\*Wording change from 2012

Sample: Branch visitors



# ACCESS & AWARENESS

## Attitudes

% Agree (TOP2)



2001



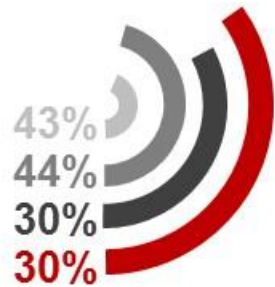
2006



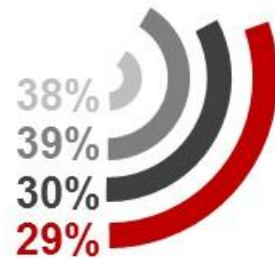
2012



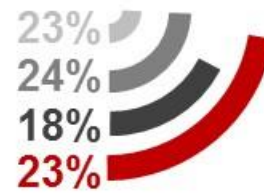
2015



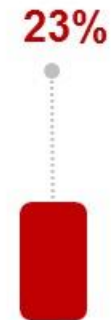
I know very little about the services that public libraries offer



I prefer to buy books rather than borrow them from a public library



The Internet has made libraries irrelevant



I expect my use of libraries to decrease as I use the Internet more (Users only)

Q38-55 For each of the following statements would you please tell me if you agree or disagree? You can do this by telling me if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree. The first is...  
Sample: Full Sample (DK answers are included in the calculations – not visualized)

A close-up photograph of a person's hand pointing at a tablet. The tablet screen shows a library application interface with a 'Library' button and a list of items. The background is a blurred image of a book's pages.

# DIGITAL LITERACY & INCLUSION



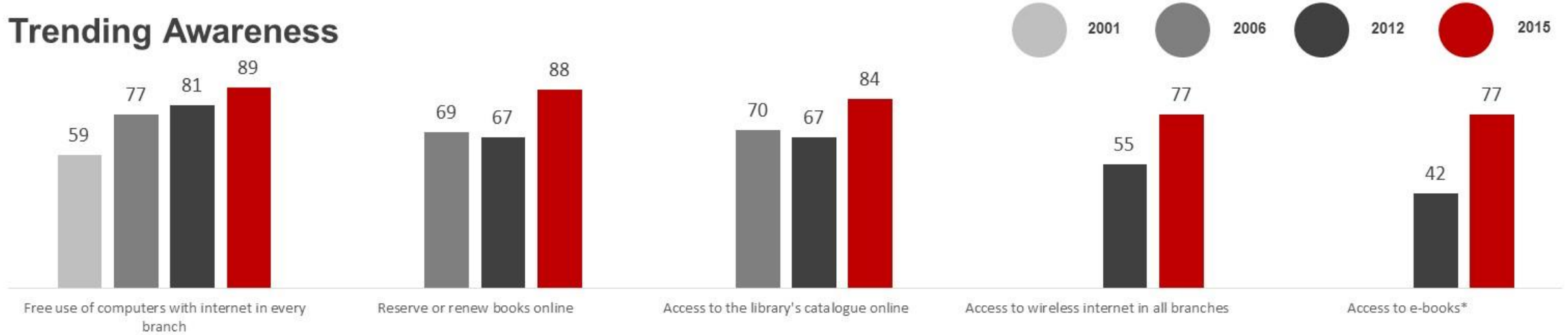
FORUM  
RESEARCH



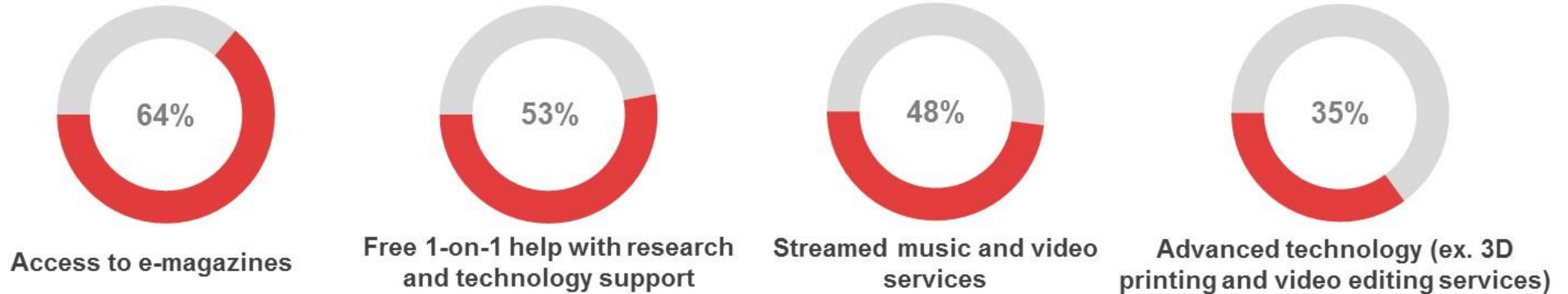
# DIGITAL LITERACY & INCLUSION

## Overall awareness of technology related services

### Trending Awareness



### 2015 Awareness



Q10 - Now I'm going to read you a list of services that a Library may offer. Can you please tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city. Simply tell me Yes or No for each of the following

\* Question wording change

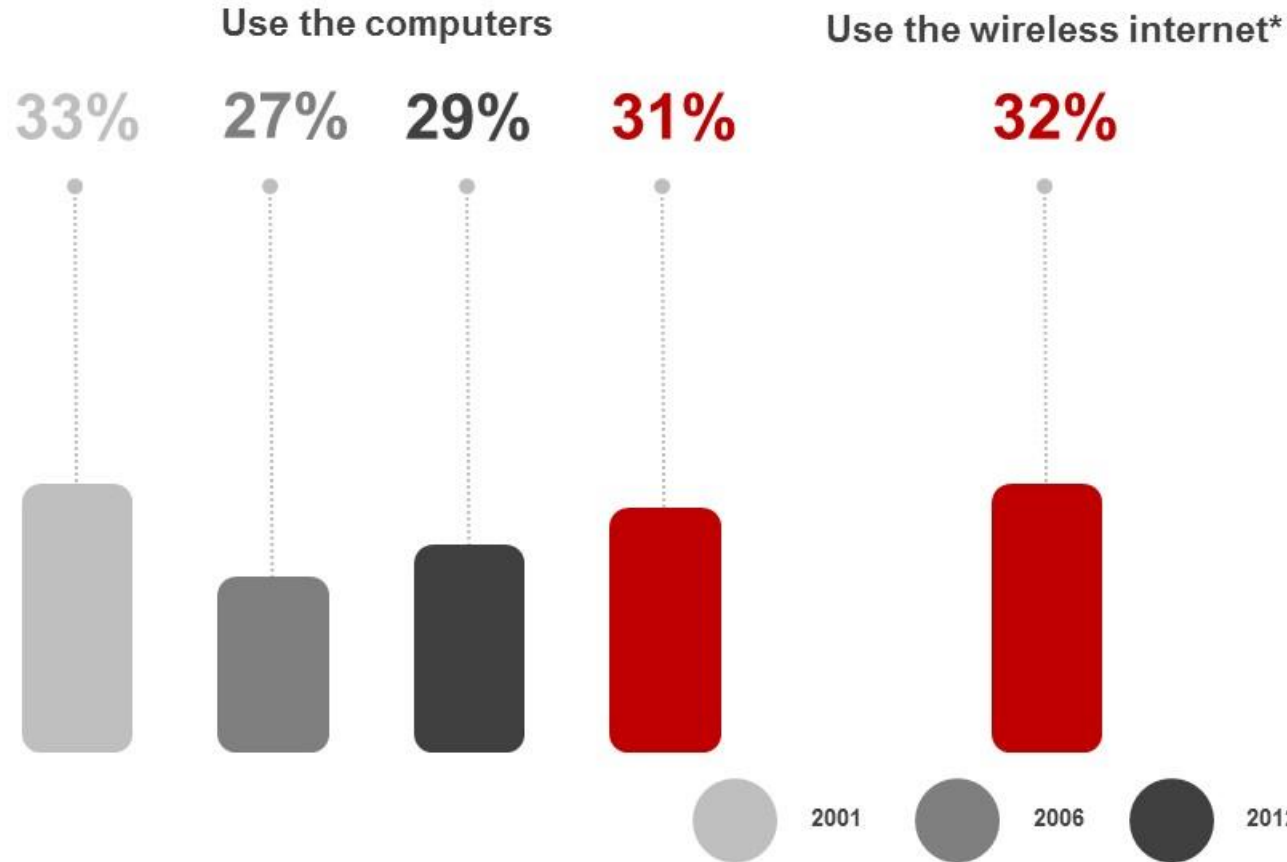
Sample: Full Sample (Unsure answers are included in the calculations – not visualized)



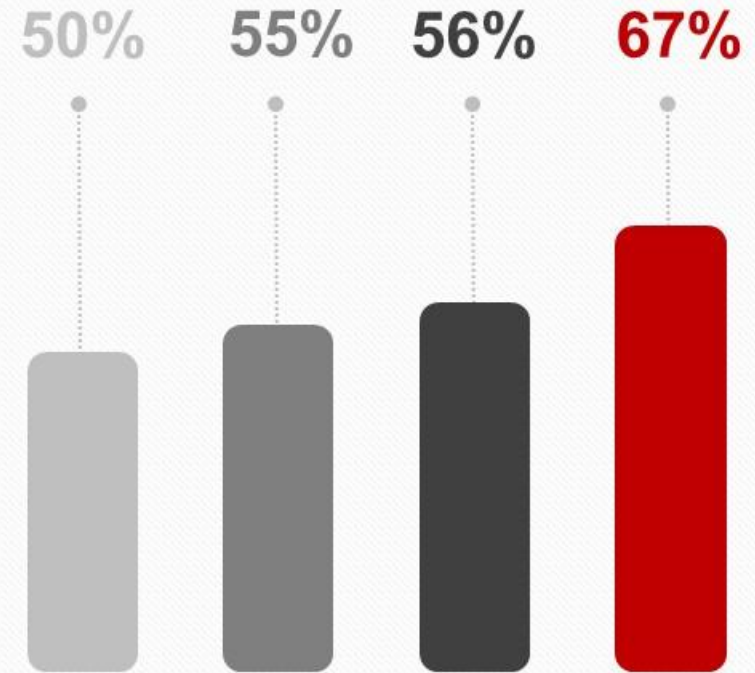
# DIGITAL LITERACY & INCLUSION

## Visiting the library

When you visit the library is this usually to...



When you have visited a public library have you used one of the library's computers for any purpose?



Q12 - When you visit the library is this usually to... (Multiple responses accepted)

Q13 - When you have visited a public library have you used one of the library's computers for any purpose? (DK answers are included in the calculations – not visualized)

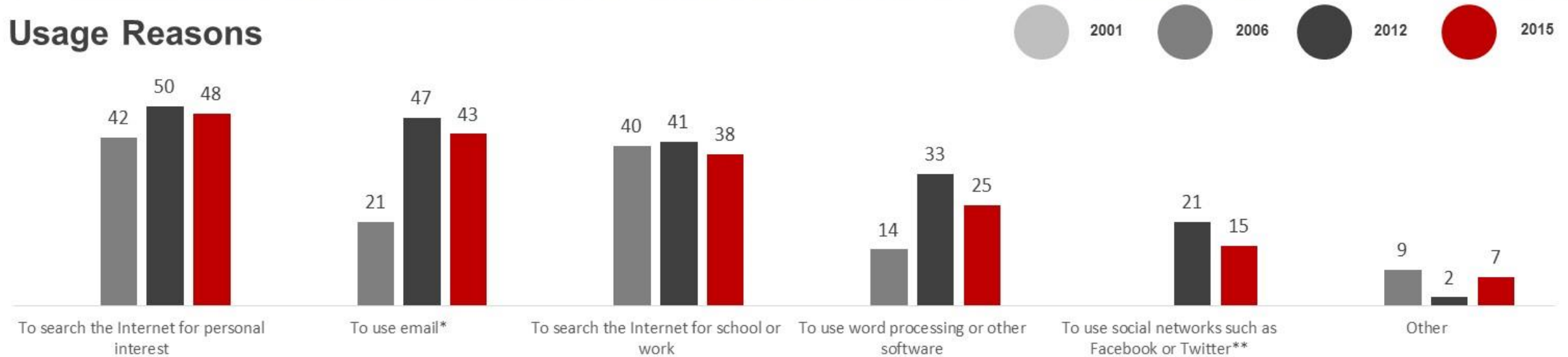
\*New answer options for 2015

• Sample: Branch visitors

# DIGITAL LITERACY & INCLUSION

## Library computer usage

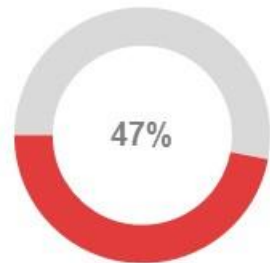
### Usage Reasons



### 2015 Usage



To access the library's website



To access online research databases and learning resources



To stream or watch online videos or music



To play online games



To upload or download music or videos

Q14 - When you have used computers at the library, what did you use them for? (Multiple responses accepted)

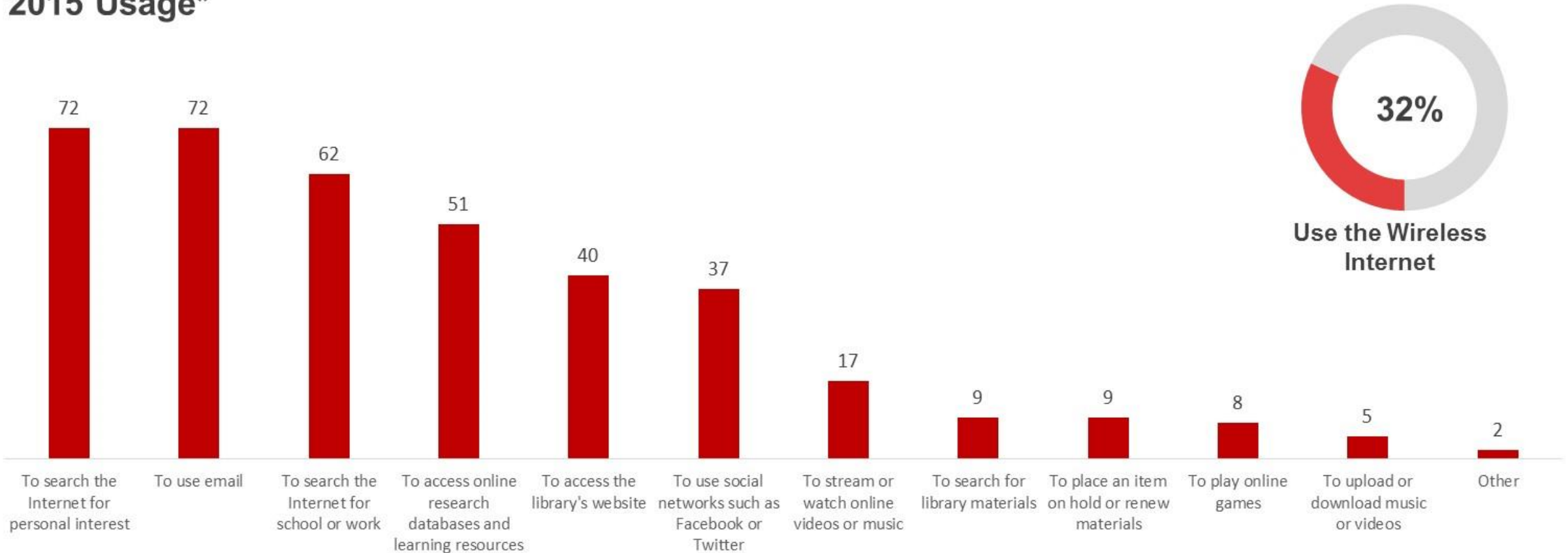
\*Question wording change \*\*Wording change from 2012

• Sample: Library computer users

# DIGITAL LITERACY & INCLUSION

## Wireless Internet usage

### 2015 Usage\*



Q15 - Previously you indicated that you used the wireless internet at the library, what did you use it for? (Multiple responses accepted)

\* New question for 2015

Sample: Library's wireless internet users



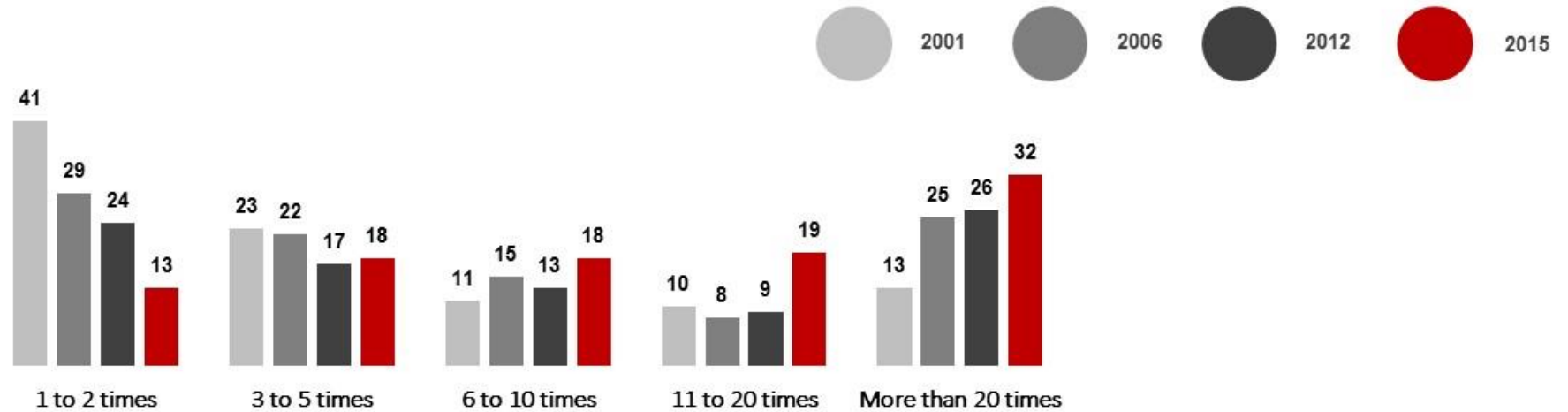
# DIGITAL LITERACY & INCLUSION

## TPL website access

### Method



### Frequency



Q16 - You mentioned earlier that in the past year you had accessed the Toronto Public Library web site. How often have you done this in the last twelve months?

• (Note: 2015 did not have an option to refuse/DK this question – instead asked for an estimate)

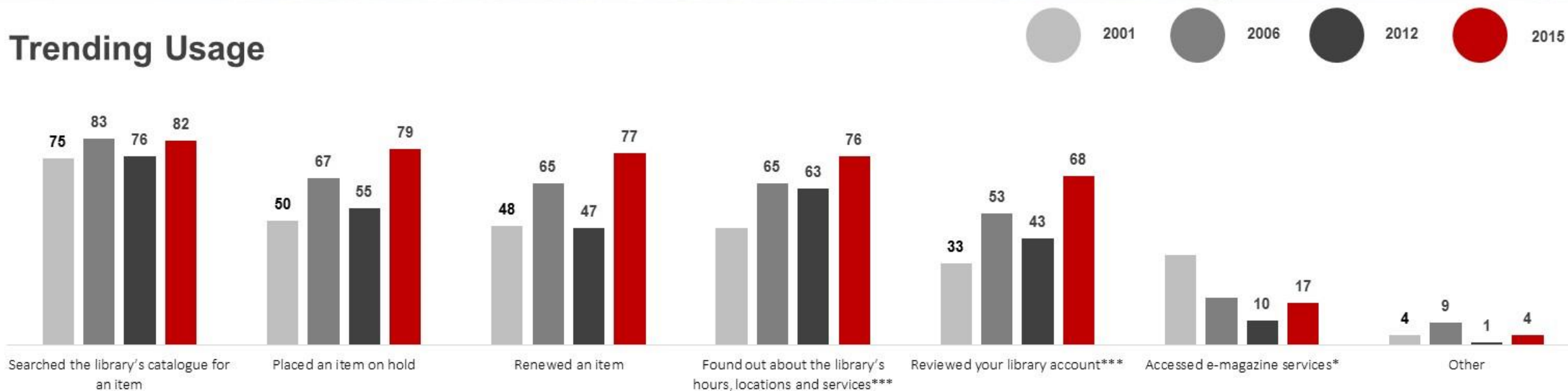
Q17 - Through which methods did you access the Toronto Library website? (Multiple responses accepted)

Sample: Toronto Public Library website users

# DIGITAL LITERACY & INCLUSION

## TPL website usage

### Trending Usage



### 2015 Usage\*



Q18 - And what services on the library's web site have you made use of? Have you... (Multiple answers accepted) Sample: Toronto Public Library website users

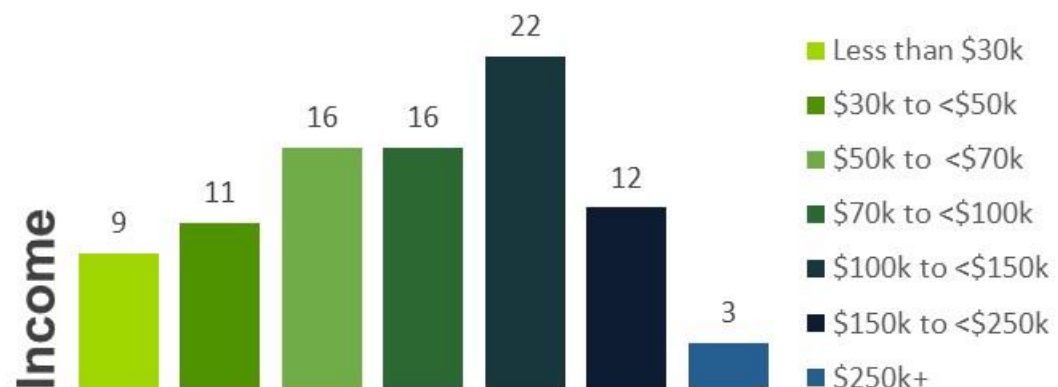
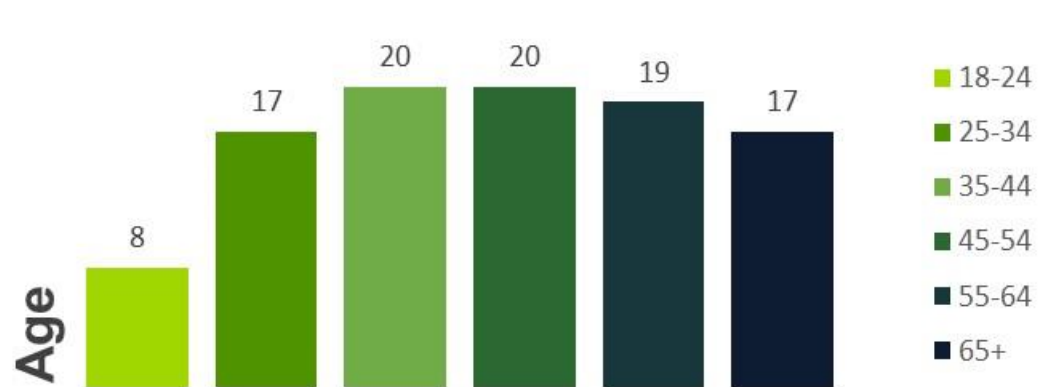
\*\*Q19 - Have you downloaded an ebook from Toronto Public Library? Sample: Respondents who searched the library's e-book collection

\* New question for 2015 \*\*\*Wording change from 2012

# DIGITAL LITERACY & INCLUSION

## eBook Profile

Downloaded an ebook from Toronto Public Library (%)\*



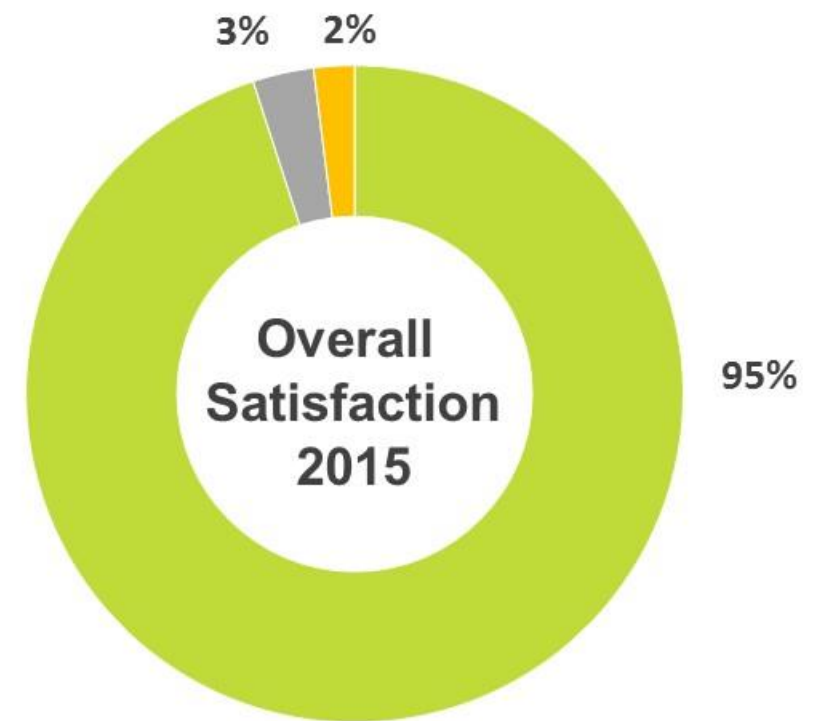
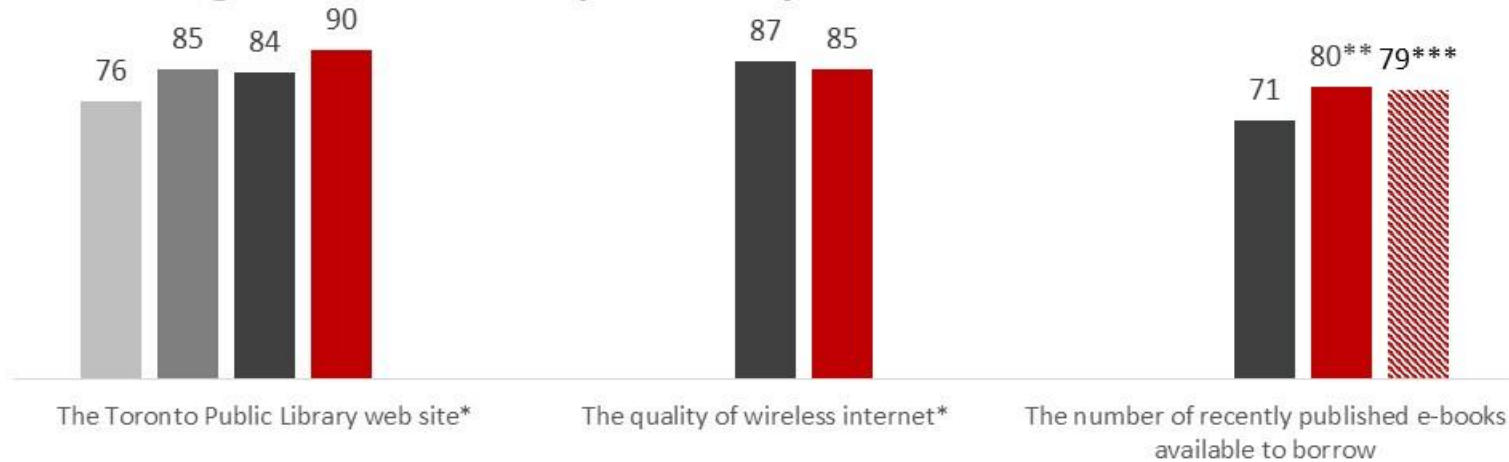
Q19 - Have you downloaded an ebook from Toronto Public Library?  
Where applicable DK answers are included in the calculations – not visualized  
\*Sample: Respondents who searched the library's e-book collection



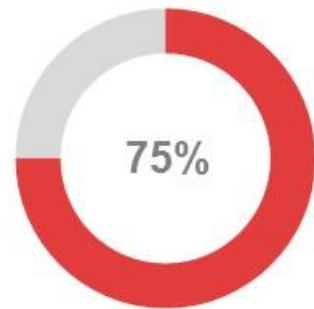
# DIGITAL LITERACY & INCLUSION

## Satisfaction – technology related services

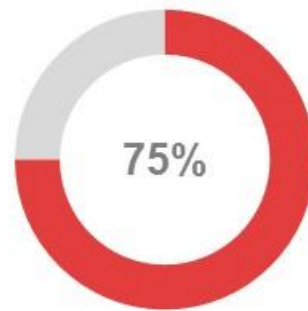
### Trending Satisfaction (TOP3 %)



### 2015 Satisfaction (TOP3 %)



The number of computers available for use\*



The software on the library's computers\*



Q22, 24, 28, 31, 32 - Now, I'd like to ask you how satisfied you are with each of the following aspects of the Toronto Public Library and its services. You can do this by giving me a number between one and seven in which "7" means you are very satisfied and "1" means that you are not at all satisfied. The first is...

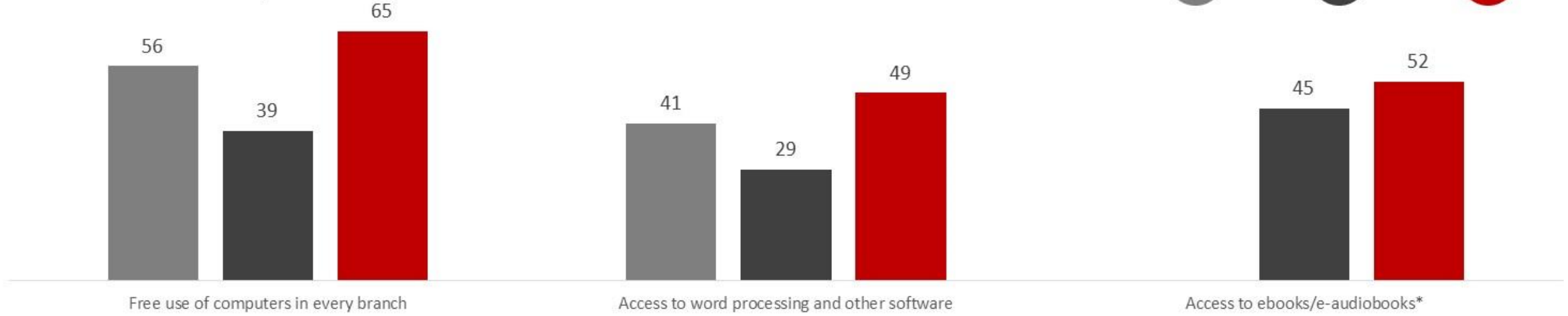
\* Accessed the service \*\* Downloaded an e-book \*\*\* Searched for an e-book

DK answers are excluded from calculations

# DIGITAL LITERACY & INCLUSION

Technology related services interest – non-users

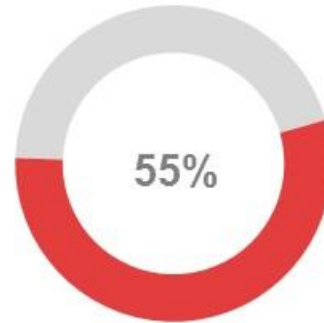
## Service Interest (TOP3%)



## 2015 Service Interest



Free use of wireless internet



Access to advanced technologies like 3D printing and video editing software

Q57, 65, 67, 68, 69- The Toronto Public Library system provides a wide range of services. For each of the following services can you please tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is... (DK answers are included in the calculations – not visualized)

\* Question wording change

Sample: Non-users





# EXPANDING LEARNING OPPORTUNITIES, BUILDING SKILLS AND CAPACITY

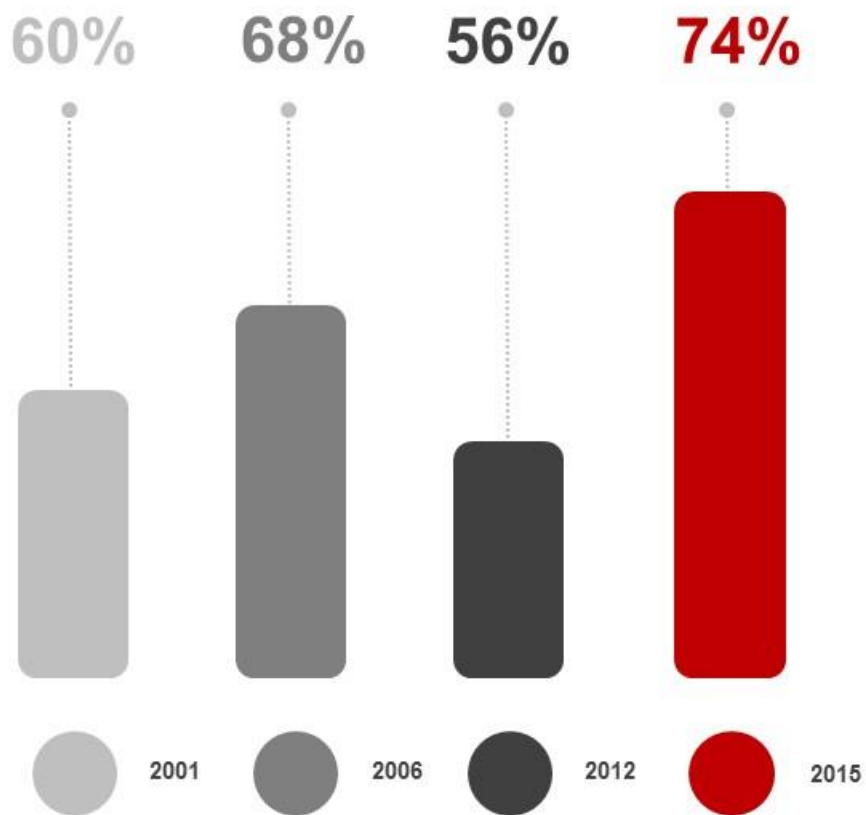


# EXPANDING LEARNING OPPORTUNITIES

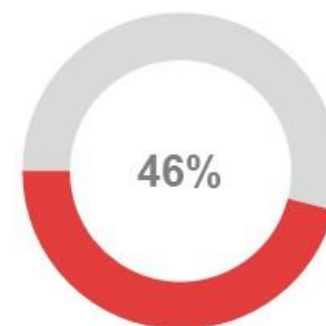
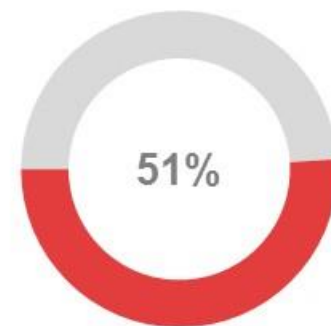
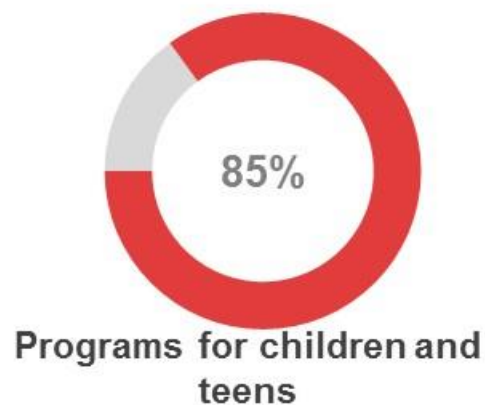
## Overall awareness of learning services

### Trending Awareness

Literacy, cultural and learning programs for adults on a variety of subjects and interests\*



### 2015 Awareness



Help with school assignments for children and teens Programs, resources, and spaces for entrepreneurs

Q10 - Now I'm going to read you a list of services that a Library may offer. Can you please tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city. Simply tell me Yes or No for each of the following

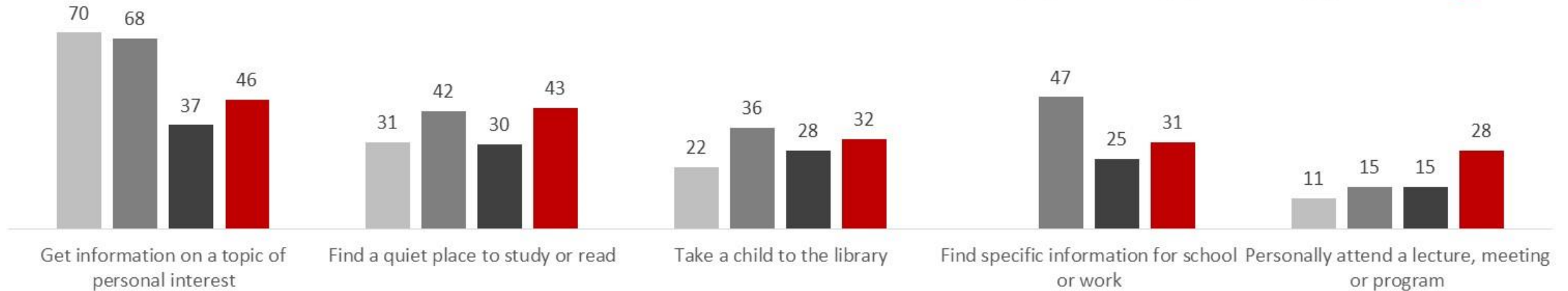
\* Question wording change for 2015

Sample: Full Sample (Unsure answers are included in the calculations – not visualized)

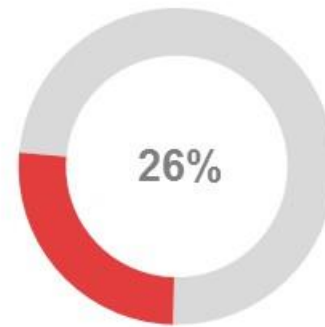
# EXPANDING LEARNING OPPORTUNITIES

## Reason for visiting a library

### Trending Reasons



### 2015 Reasons\*



Receive advice or consult with Library Staff

Q12 - When you visit the library is this usually to... (Multiple responses accepted)  
Sample: Branch visitors

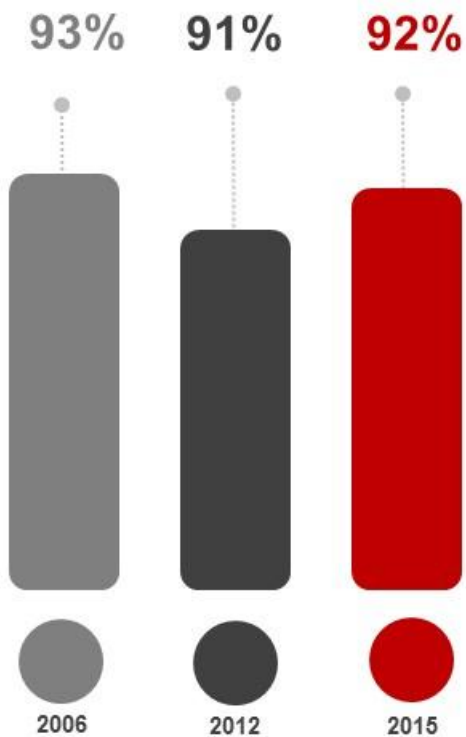


# EXPANDING LEARNING OPPORTUNITIES

## Attitudes

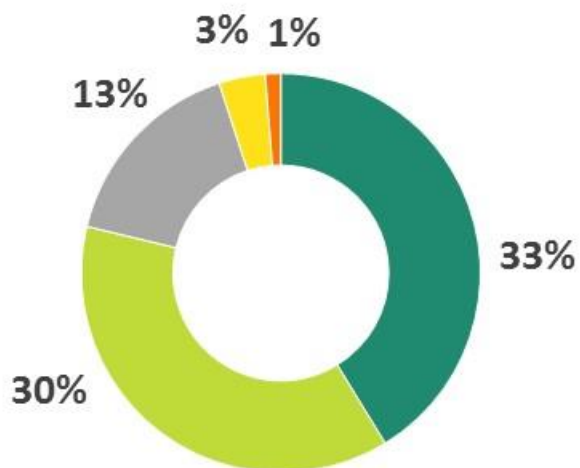
### Trending Attitudes

Libraries support literacy (TOP3%)

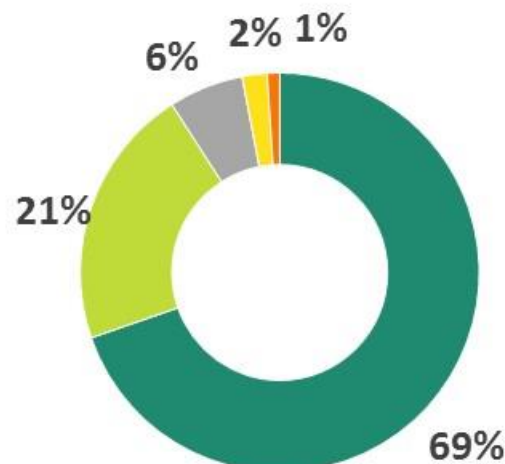


### 2015 Attitudes

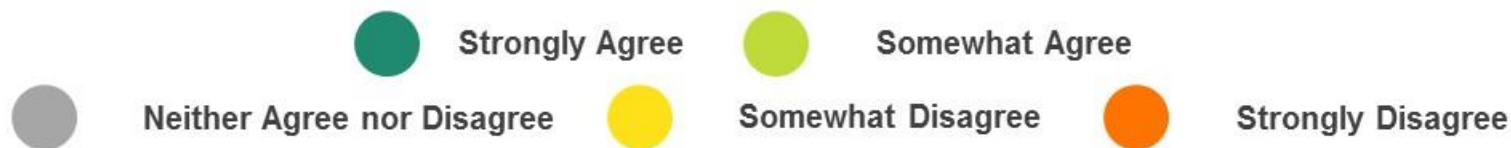
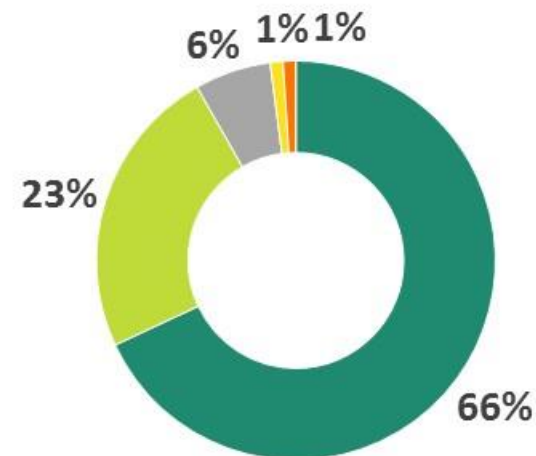
The library provides exceptional literary and cultural programs and initiatives\*\*



Libraries are a place of lifelong learning



Libraries provide important support for students



Q36, 40, 54, 55 For each of the following statements would you please tell me if you agree or disagree? You can do this by telling me if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree. The first is... (DK answers are included in the calculations – not visualized)

\*\* Sample: Library Users

Sample: Full sample

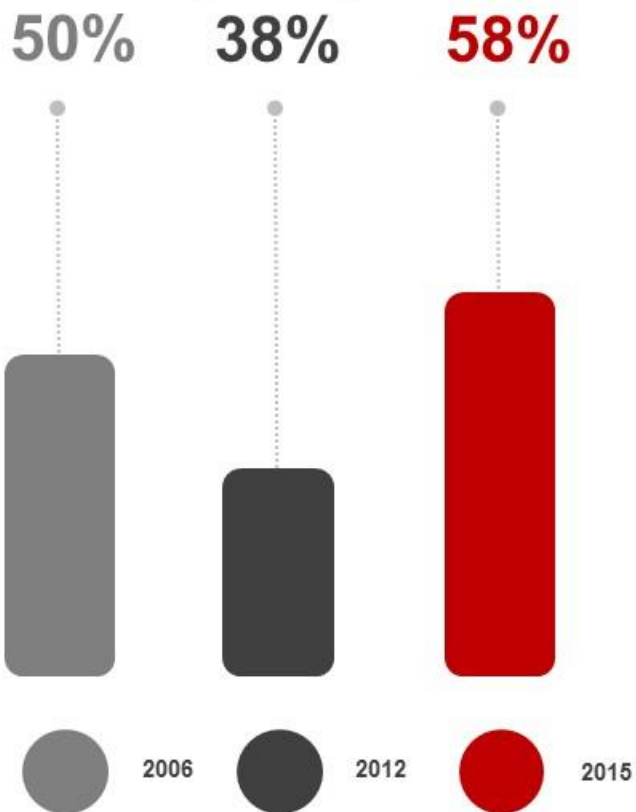


# EXPANDING LEARNING OPPORTUNITIES

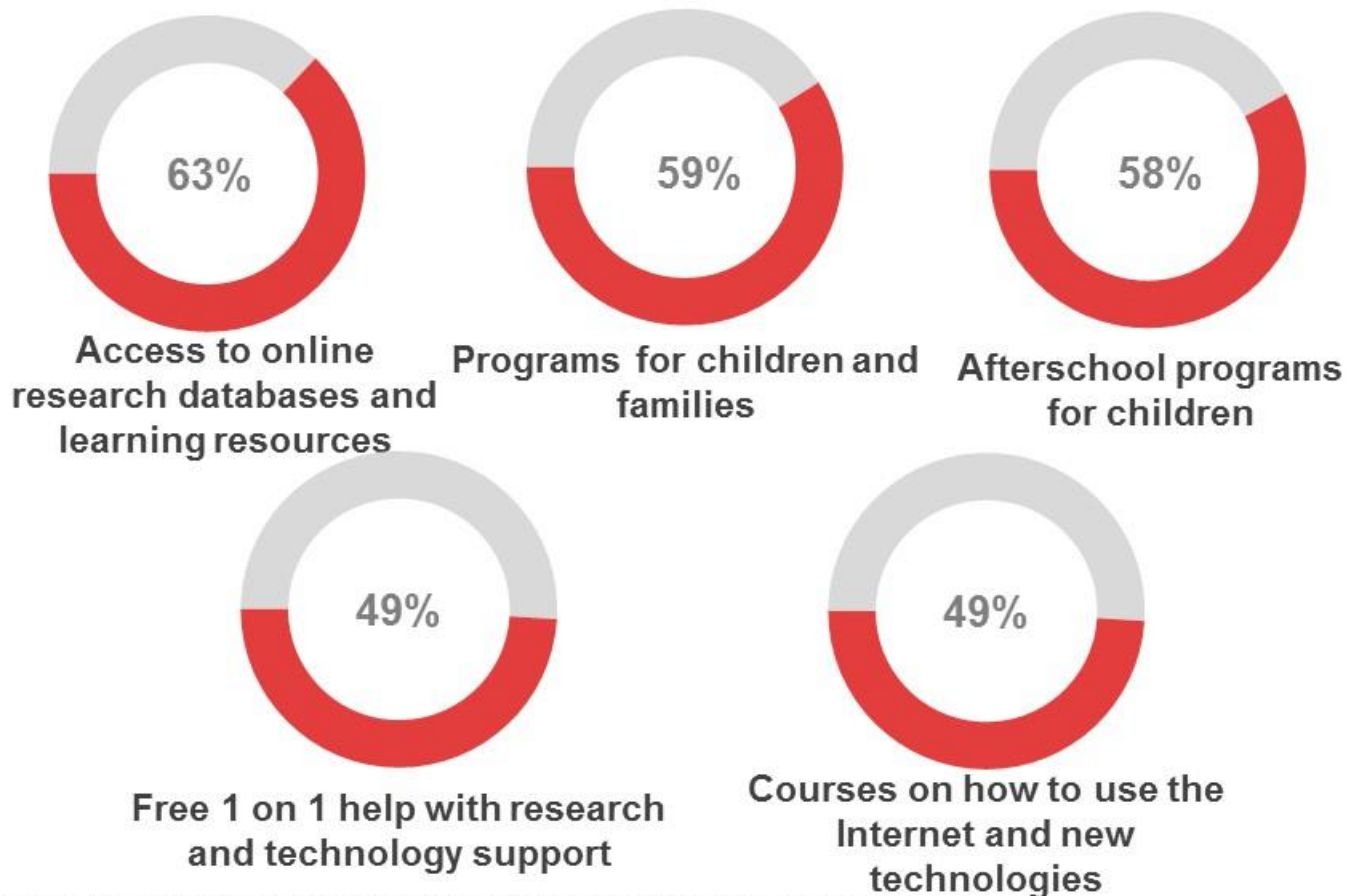
## Services interest – Non-users

### Trending Services Interest (TOP3%)

Literacy, cultural and learning programs for adults on a variety of subjects and interests\*



### 2015 Service Interest



Q61, 62, 63, 64, 66, 70 The Toronto Public Library system provides a wide range of services. For each of the following services can you please tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is... (DK answers are included in the calculations – not visualized)

\* Question wording change for 2015

Sample: Non-users

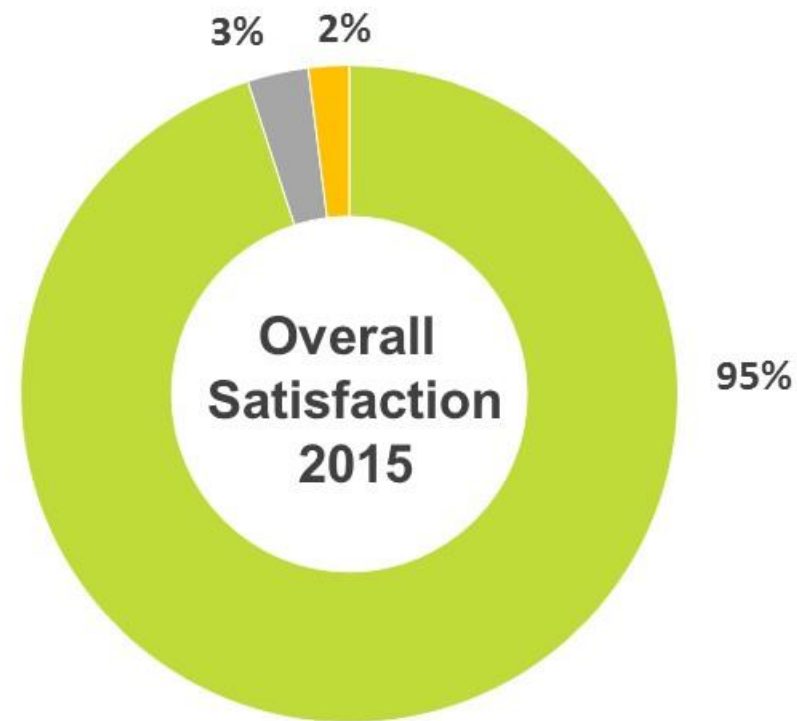
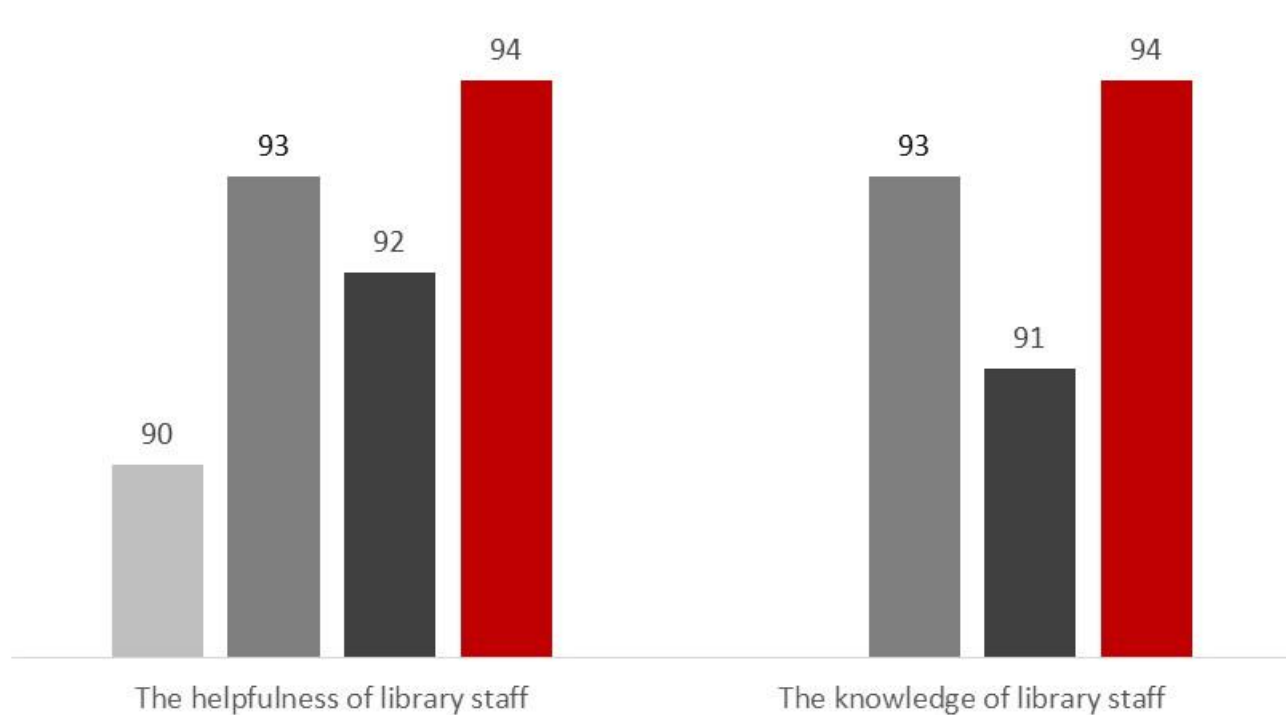
# TRANSFORMING SERVICE DELIVERY



# TRANSFORMING SERVICE DELIVERY

## Satisfaction

### Satisfaction



Q20, 27 - Now, I'd like to ask you how satisfied you are with each of the following aspects of the Toronto Public Library and its services. You can do this by giving me a number between one and seven in which "7" means you are very satisfied and "1" means that you are not at all satisfied. The first is...

DK answers are excluded from calculations

Sample: Library users

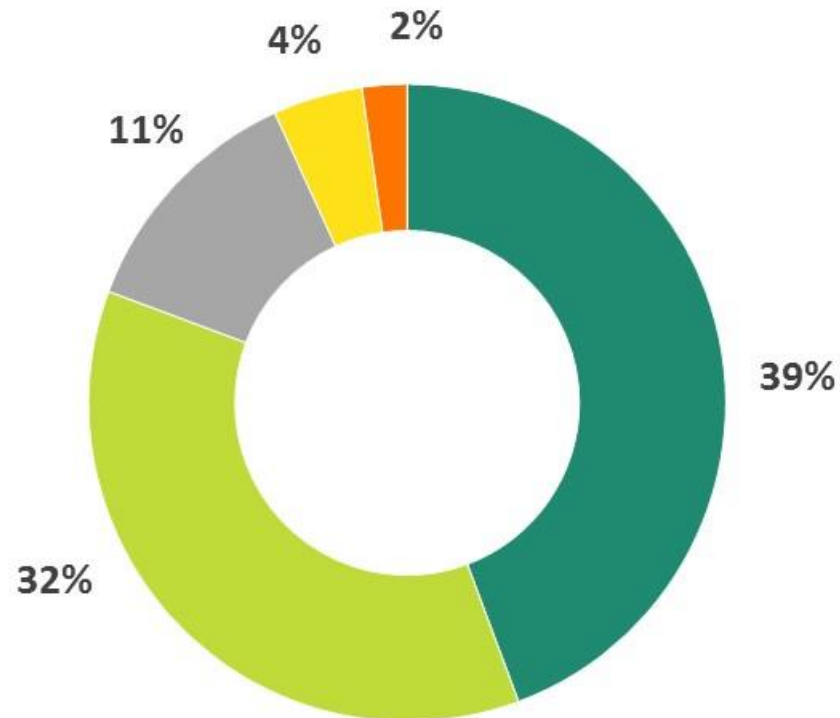


# TRANSFORMING SERVICE DELIVERY

## Attitudes

### 2015 Attitudes

I have received helpful recommendations or advice from the library



Q35 For each of the following statements would you please tell me if you agree or disagree? You can do this by telling me if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree. The first is... (DK answers are included in the calculations – not visualized)

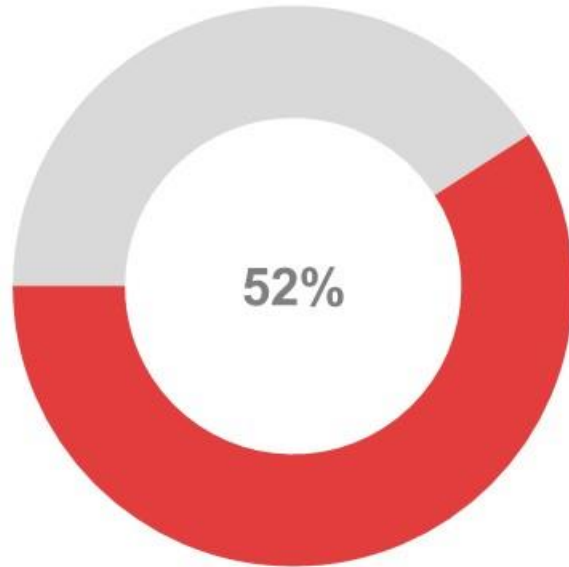
Sample: Library users

# TRANSFORMING SERVICE DELIVERY

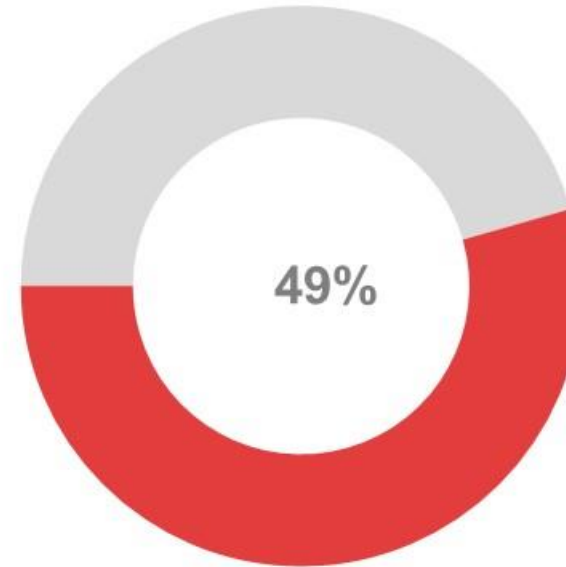
## Services interest – Non-users

### 2015 Services Interest (TOP3%)

Personalized recommendations tailored to your interests



Free 1 on 1 help with research and technology support



Q66, 71 The Toronto Public Library system provides a wide range of services. For each of the following services can you please tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is... (DK answers are included in the calculations – not visualized)

Sample: Non-users

A background image showing a person's hands interacting with a laptop and a notebook. The person is wearing a red shirt and a purple lanyard. The scene is dimly lit, with a purple tint. The text 'CREATING COMMUNITY CONNECTIONS THROUGH CULTURAL EXPERIENCE' is overlaid in large, white, bold, sans-serif font.

# CREATING COMMUNITY CONNECTIONS THROUGH CULTURAL EXPERIENCE

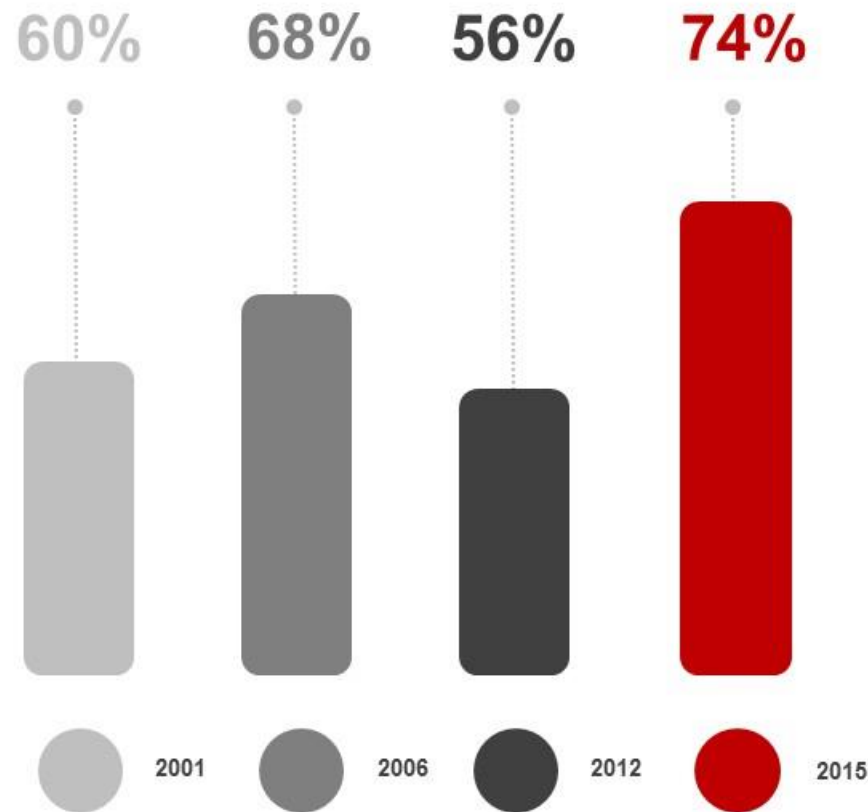


# CREATING COMMUNITY CONNECTIONS

## Overall awareness

### Trending Awareness

Literacy, cultural and learning programs for adults on a variety of subjects and interests\*



Q10 - Now I'm going to read you a list of services that a Library may offer. Can you please tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city. Simply tell me Yes or No for each of the following

\* Question wording change for 2015

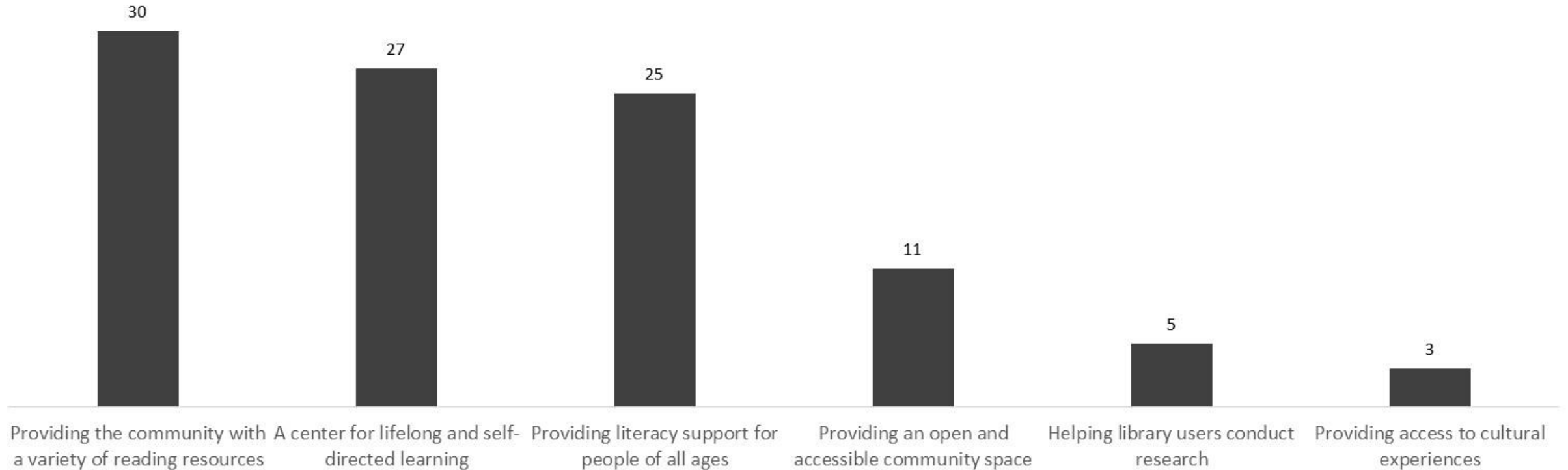
Sample: Full Sample (Unsure answers are included in the calculations – not visualized)

# CREATING COMMUNITY CONNECTIONS

Most important aspect

## Most Important Aspect(s) of a Public Library

● First Choice



Q56 - Now we are going to read you a list of ways in which a public library can help serve its local community. Can you please tell us, if you have to choose only one, which of the following do you feel is the most important aspect of a public library?

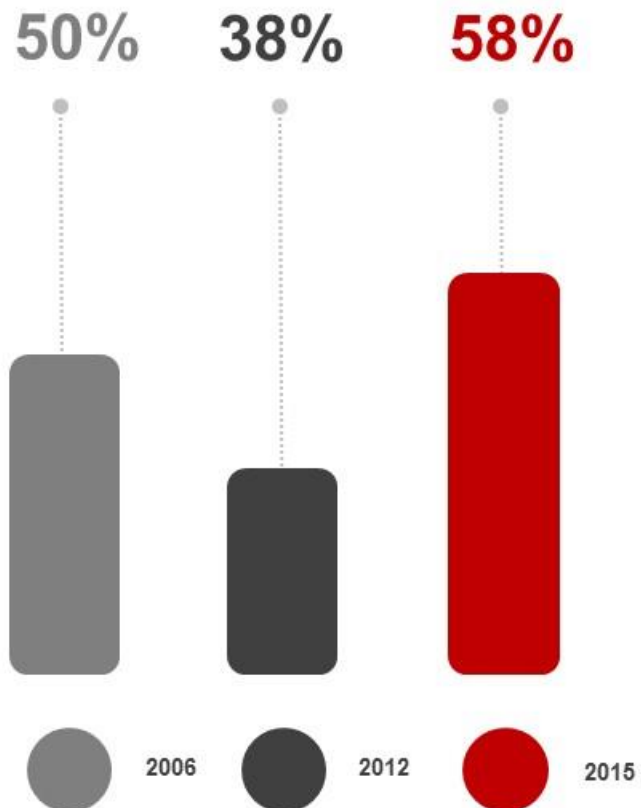
Sample: Full sample

# CREATING COMMUNITY CONNECTIONS

## Services interest – Non-users

### Trending Services Interest

Literacy, cultural and learning programs for adults on a variety of subjects and interests\*



Q62 The Toronto Public Library system provides a wide range of services. For each of the following services can you please tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is... (DK answers are included in the calculations – not visualized)

\* Question wording change for 2015

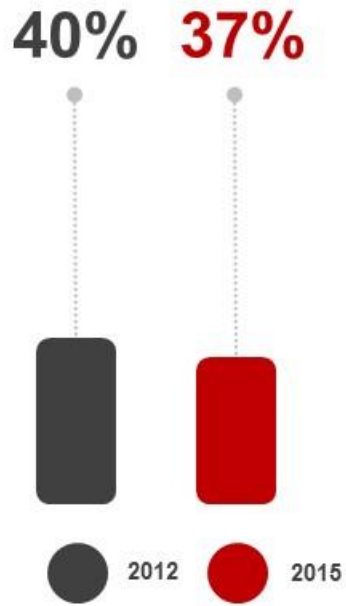
Sample: Non-users



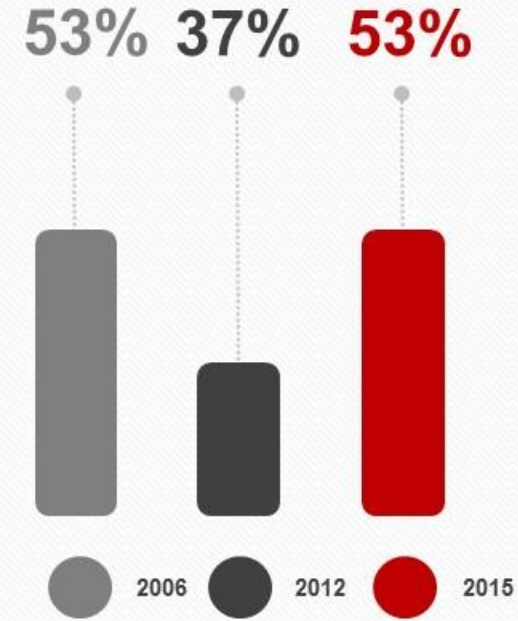
# CREATING COMMUNITY CONNECTIONS

## Fundraising

### Fundraising Awareness (% Yes)\*



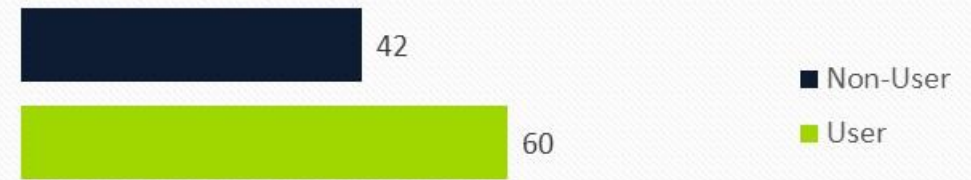
### Likelihood of donating to the Toronto Public Library (TOP2%\*\*)



Users



Users



Q81. To the best of your knowledge, does the Toronto Public Library fundraise and solicit donations from the public, businesses and other organizations?

Q82. In reality how likely would you be to donate money to the Toronto Public Library, would you be very likely, somewhat likely, not too likely or not at all likely?

Sample: Full sample

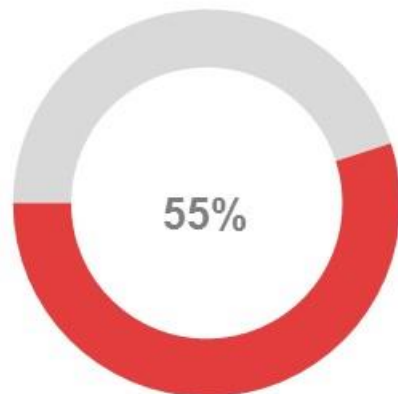
\*Question answer option change from 2012. 2015 version does not include DK option.

\*\*DK answers included in calculations - not visualized

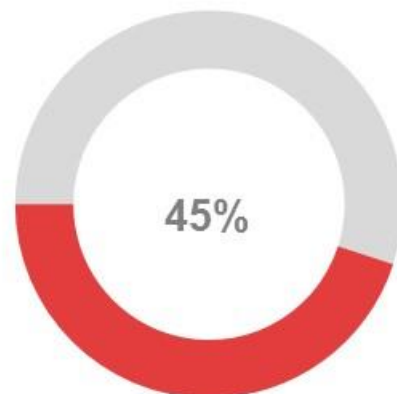
# FACTORS ENCOURAGING USE

## Non-Users

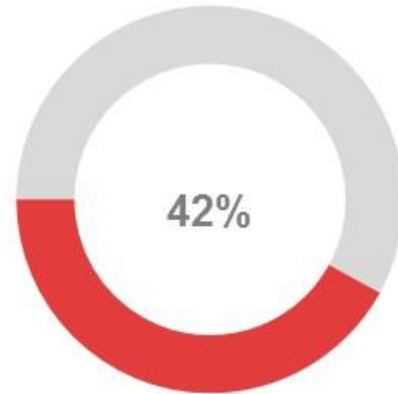
### 2015 (TOP3%)



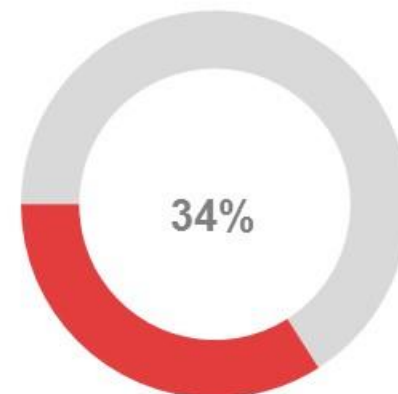
If libraries had the most recently published books



If libraries were more attractive and comfortable places



If the library had more ebooks, e-audiobooks, or other online content available to download



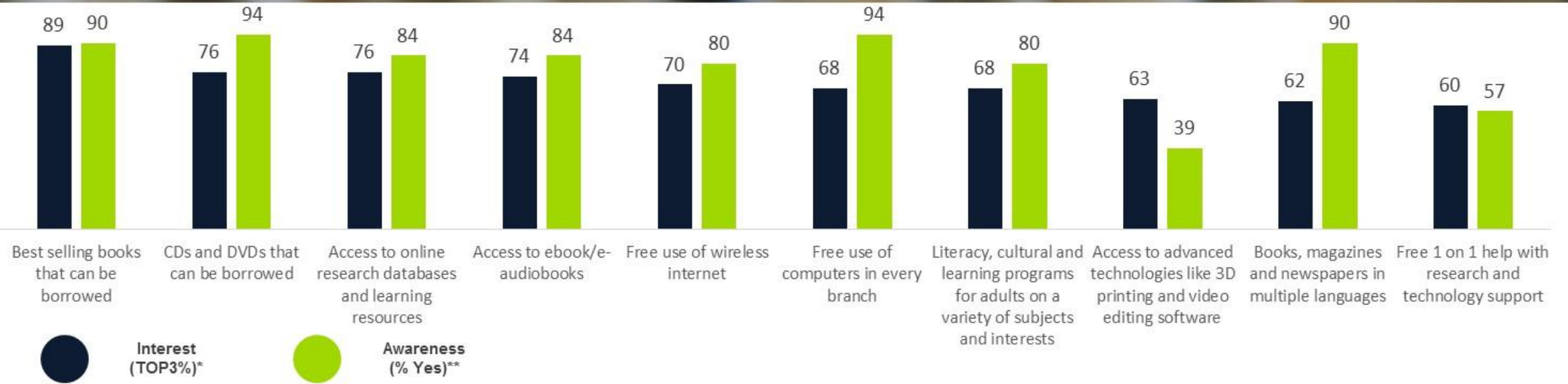
If the library had reduced or more lenient fines for overdue materials

Q75 – 80: And for the following can you please tell me how much of a factor each would be in encouraging you to use a public library more often? (DK answers are included in the calculations – not visualized)

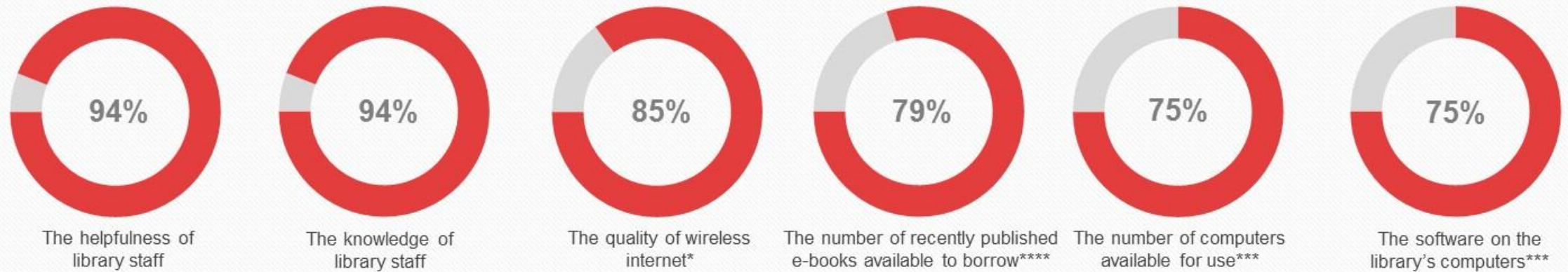
Sample: Non-users

# INTEREST IN LIBRARY SERVICES

Users



## Satisfaction



\*DK answers are included in the calculations – not visualized

\*\*Unsure answers are included in the calculations - not visualized \*\*\*Accessed the service \*\*\*\*Searched for an e-book

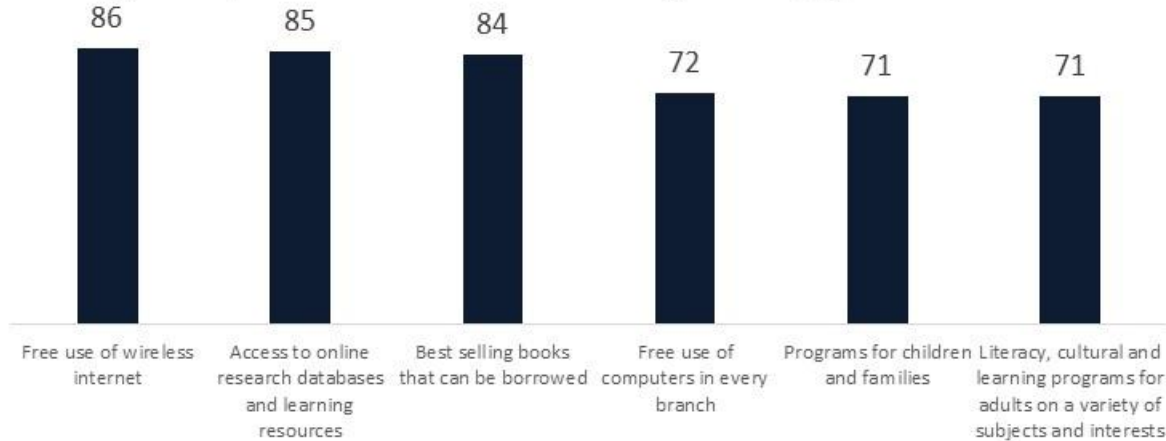
Sample: Users



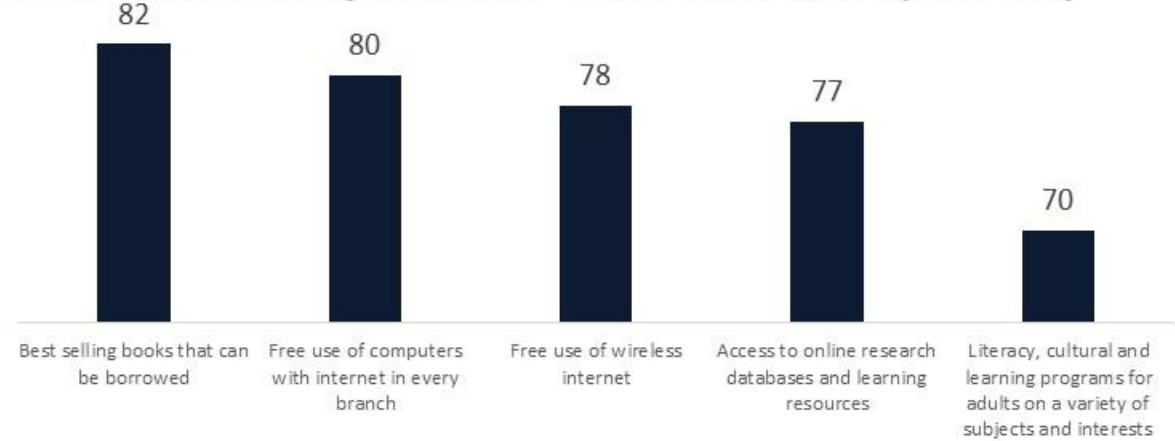
# INTEREST IN LIBRARY SERVICES

## Target Groups

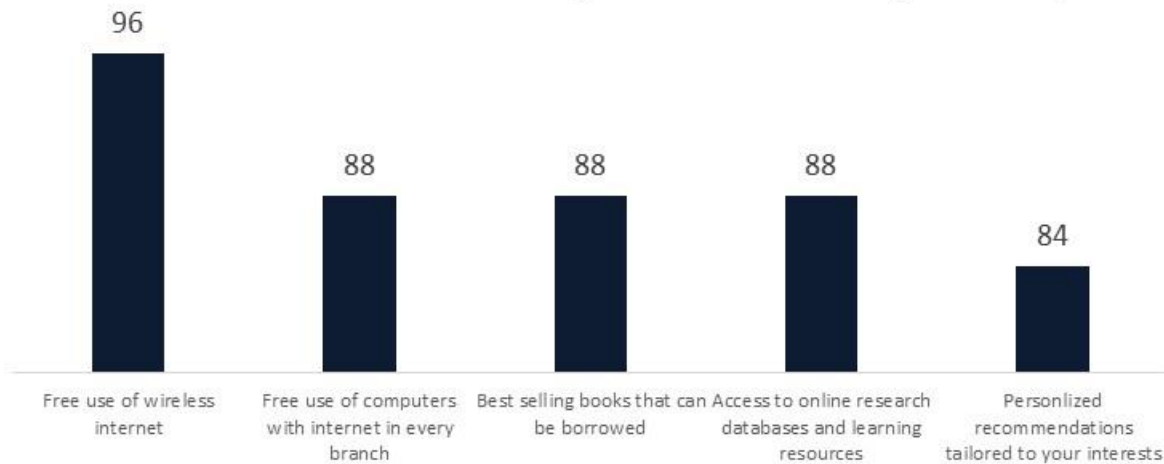
### Young Respondents - 18 thru 24 (TOP3%)



### Low Income Respondents - Less than \$30K (TOP3%)



### Newcomers - Less than 1 year in Canada (TOP3%)\*



\*Respondents not born in Canada (Small sample)  
DK answers are included in the calculations – not visualized  
Full sample

The software on the library's computers\*\*\*

# DEMOGRAPHICS



## Branch Visitors

Heavy

**23%\***

Heavy users are likely to be low to middle income with the highest percentage earning <\$30K\* and \$30K to <\$50K (18%).

**24%**

Heavy users are likely to be older residents with the highest percentage ages 65 or older.

## Users & Non-Users



**32%\***

Library users are more likely than non-users to be employed part-time (15%) or unemployed\*.

# USER CHARACTERISTICS

**19%\***

Library users are on both low and high ends of the income spectrum with the highest percentages earning <\$30K\* and \$150K to <\$250K (9%) compared to non-users.

**37%\***

Library users are likely to be highly educated with the highest percentages with a graduate university degree\*, an undergraduate university degree (28%), and some university (10%).

**57%**

of library users are female, while the remaining 43% are male.

**19%\***

Library users are likely to be older than the non-users with the highest percentages ages 35-44\*, 45-54\*, 55-64 (15%), and 65 or older\*.

**69%\***

Library users are likely to be newer established residents and long-term residents with the highest percentages of “1 to 5 years” (16%) and “more than 10 years”\*.

**32%\***

Library users are more likely than non-users to be employed part-time (15%) or unemployed\*.



# NON-USER CHARACTERISTICS

**20%\***

Non-users have mixed income with the highest percentages earning \$30K to <\$50K (18%) and \$70K to \$100K\*.

**19%\***

Non-users are likely to be more diversely educated with the highest percentage who graduated college\*, “graduated high school” (11%), some vocational, technical, college or CEGEP” (10%), “some high school” (4%), and “public/elementary school” (1%).

**54%**

of non-users are male, while the remaining 46% are female.

**23%\***

Non-users are likely to be younger with the highest percentages ages 18-24 (14%) and 25-34\*.

**14%\***

Non-users are likely to be new comers and established residents with the highest percentages of “less than 1 year” (6%) and “5 to 10 years”\*.

**63%\***

Non-users are more likely to be employed full-time\*. About a quarter (26%) are unemployed.