



STAFF REPORT INFORMATION ONLY

10b.

Strategic Plan 2016-2019: Results of Survey of Torontonians

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| Date: | December 14, 2015 |
| To: | Toronto Public Library Board |
| From: | City Librarian |

SUMMARY

The purpose of this report is to provide a summary of the results of a survey of Torontonians undertaken by Toronto Public Library (TPL) in November 2015. The survey examined awareness, usage and satisfaction with TPL's services among residents 18 years of age and older, including both users and non-users. The survey was conducted by Forum Research Inc. for TPL and included both telephone interviews and online surveys of 1,201 residents. The survey was part of the consultation strategy for the Library's new Strategic Plan 2016-2019. This is the fourth time the Library has conducted the survey, enabling comparisons over time.

Highlights of the survey results include:

- 76% of Torontonians 18+ (72% in 2012) indicated they have visited a branch, accessed the Library website, or contacted the Library by phone in the past 12 months;
- This figure rises to 80% when a new measure introduced in the 2015 survey regarding visiting the Library's social media accounts is included;
- 95% of residents are satisfied with Toronto Public Library and the quality of Library services in Toronto;
- 94% are satisfied with the knowledge and helpfulness of Library staff.

Overall awareness of library services has increased compared to 2012 results; the highest gains in awareness are around access to e-books and digital library services.

FINANCIAL IMPACT

There is 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

A survey of Toronto residents by an external polling firm was approved by the Toronto Public Library Board as a component of Toronto Public Library's 2016-2019 Strategic Plan consultation process.

At its June 22, 2015 meeting, the Library Board approved the report *Strategic Plan 2016-2019: Draft Priorities and Consultation Plan*:

<http://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2015/jun22/13a-spsc-strategic-plan-2016-2019-draft-priorities-and-consultation-plan.pdf>

ISSUE BACKGROUND

A survey of Toronto residents by an external polling firm was approved by the Toronto Public Library Board as a component of the Toronto Public Library's 2016-2019 Strategic Plan consultation process. This research aimed to gather demographic data of Toronto Public Library users, infrequent users, and non-users; and measure awareness of, attitude toward, needs and satisfaction with Toronto Public Library's services.

Three similar public surveys of Toronto residents were conducted in 2001, 2006 and 2012. Baseline questions from the 2012 survey were repeated in the 2015 survey, with new questions developed to address new service areas and survey objectives.

COMMENTS

Forum Research Inc. was retained, through a Request for Proposal process, to conduct a statistically valid survey of Toronto residents age 18 and older.

Survey Goals:

- To gather demographic and market data about the Library's users and non-users;
- To measure awareness of, and attitudes toward, library services by users, infrequent users, and non-users;
- To determine the percentage of Torontonians who use the Library through any channel;
- To assess satisfaction with library services;
- To increase the understanding of users' and non-users' perception of the Library brand and preferences for library services in the future.

Methodology

The methodology included telephone interviews on cell phones and landlines, as well as online surveys. A total of 1,201 random samples were collected between November 12 and November 20, 2015, including 603 telephone interviews and 598 online surveys.

Key Findings

The results of the survey align with and support the six priorities of the Library's new draft Strategic Plan *Expanding Access, Increasing Opportunity, Building Connections* highlighting the importance of programming technology and space as key drivers of library use.

Usage of Library Services

The number of Toronto residents who report using the Library in the last year has increased from 72% in 2012 to 76%.

Overall library usage is increasing, however the reasons people visit library branches are changing. While browsing for books remains a prime driver of activity, the results highlight the growing importance of the Library as a space to study, use wireless and computers and connect with others through library programs and events. There is growing usage of the Library's website, e-resources and self-service functions.

- 76% of adult Torontonians, compared to 72% in 2012, have either visited a library branch, the Library's website, or contacted the Library by phone in the past 12 months;
- This figure rises to 80% when a new measure regarding visiting the Library's social media accounts is included;
- Visits to library branches remain the primary method of using the Library but have declined slightly (67% to 66%) while visits to the Library's website have proportionally increased (38% to 40%);
- Browsing for books of interest, picking up holds and getting information on a topic of personal interest are the top reasons for visiting a library branch;
- Using library space for quiet study and attending library programs are increasing reasons for using library space;
- 32% of library visitors access the Library's wireless service and 67% use library computers;
- Among wireless internet users, 72% search the internet for personal interest, 72% use it for e-mail, 62% search the internet for school or work, 51% access online research databases and learning resources.

Satisfaction with Library Services

Overall satisfaction with TPL remains high at 95%.

While overall satisfaction with library service and staff is very high, there are opportunities to improve service to increase satisfaction and address the needs and interests of non-users. There is relatively lower satisfaction with the number of computers available in library branches and the software available.

- Satisfaction with the helpfulness of library staff has increased to 94% from 92% in 2012;
- Satisfaction with the knowledge of library staff has increased to 94% from 91% in 2012;
- 90% of TPL website users are satisfied with the website, an increase from 84% in 2012;
- Satisfaction with the quality of wireless internet has decreased slightly to 85% from 87%;

- There is lower satisfaction (75%) with the number of computers available for use, and the software on the Library's computers (75%).

Awareness of Library Services

Overall awareness of library services among both users and non-users has increased across all services tracked in previous surveys, and as expected, library users are more aware of available services. For new answer options included in the 2015 survey, variation in awareness levels suggests that programs aimed at certain target groups, e.g. job seekers and entrepreneurs, could benefit from increased marketing and promotion efforts.

- Overall awareness of digital library services among users and non-users has increased in areas of strategic focus: access to e-books (increased from 42% to 77% in 2015) and access to wireless internet in all branches (increased from 55% to 77% in 2015);
- Among new answer options included in the 2015 survey, while 85% of respondents were aware that the Library offers programs for children and teens, only 63% were aware that the Library offers resources for job seekers of all ages, and only 46% were aware that the Library offers programs, resources and spaces for entrepreneurs.

Attitudes Towards and Perception of Public Libraries

There is strong agreement among adult Torontonians that libraries support literacy (98%), provide important support for students (92%) and are places of lifelong learning (91%).

Next Steps

Library staff will analyze the results of the survey and use them to inform strategic and service planning, including marketing and outreach strategies. By incorporating strategies to improve service and build usage among Toronto residents, the Library will strengthen its contribution to Toronto communities and fulfil its mission to provide *free and equitable access to services which meet the changing needs of Torontonians*.

CONTACT

Elizabeth Glass; Acting Director, Planning, Policy & E-Service Delivery;
Tel: 416-395-5602; E-mail: eglass@torontopubliclibrary.ca

Michele Melady; Acting Manager, Planning & Development; Tel: 416-395-5551;
E-mail: mmelady@torontopubliclibrary.ca

SIGNATURE

Vickery Bowles
City Librarian