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To: Toronto Public Library Board – January 29, 2007

From: City Librarian

Subject: **Survey of City-Wide Residents**

Purpose:

To provide the Toronto Public Library Board with an overview of the results of the 2006 survey of city-wide residents.

Funding Implications and Impact Statement:

There are no financial implications arising from this report.

Recommendation:

It is recommended that the Toronto Public Library Board receive the report *Survey of City-Wide Residents* for information.

Background:

Toronto Public Library recognizes that good governance includes a commitment to the principles of participation, responsiveness, transparency, and inclusiveness. To support this direction, the Library has developed a Public Consultation Policy that encourages and facilitates civic engagement and public participation in the development of library service.

The policy confirms Toronto Public Library's commitment to understanding and responding to the diverse needs of the people of Toronto. To this end, the Library analyzes library usage data and gathers customer input through a variety of formal and informal methods including public meetings, open houses, comment forms, as well as surveys of user and non-users.

The Library's second strategic plan, *Urban Stories: The Next Chapter*, is near its end, and planning for the new strategic plan will begin in 2007. A new city-wide opinion poll of residents has been completed, and the results of this survey will be an important input to this process.

Comments:

Toronto Public Library undertook its first major city-wide market research in 2001. The focus of the research was to gather information about the public's awareness, attitude, usage, and satisfaction with library services. The results from the survey have been used extensively in a variety of ways to support service enhancement and development.

In 2006, the Library undertook a second city-wide opinion poll of residents. The research again consisted of a random telephone survey of 1250 City of Toronto residents at least 18 years of age. The overall purpose of the survey was to gather information on library users, infrequent users, and non-users. Specifically, the survey:

- Assessed awareness and gauged usage of library services;
- Assessed attitudes towards Toronto Public Library and the services offered;
- Evaluated interest in services offered by the Library;
- Assessed satisfaction with Library services;
- Explored perceptions of Library hours and preferences for increasing hours;
- Explored awareness and impressions of Library fundraising; and,
- Probed why non-users do not use the Library.

With a proportion of the questions recurring from the 2001 survey, the new survey also provides the opportunity to compare results with the 2001 baseline data, and enables the Library to conduct some long-term tracking of public awareness, usage, satisfaction, and priorities. Detailed results of the survey will be highlighted as part of the environmental scan for the Library's new strategic plan, and will be communicated to Library staff to assist with service planning. Key findings are summarized below.

Key Findings:

Visits to the Library

- Toronto Public Library is used frequently by a very broad cross-section of the population - nearly half of all Torontonians report visiting a Library branch in the last month reflecting the continuing importance of public libraries in the city.
- Three-quarters of Torontonians accessed the Library in the past year either in person, by phone or on-line. Telephone, online and Library visits are not mutually exclusive with the majority of users (72 percent) making use of more than one point of access.
- There appears to be a slight trend of declining usage by those aged 55+.

Awareness of Library Services

- Both users and non-users report awareness of the Library's core service and product offerings. Awareness is highest for Library collections and free use of computers with Internet access, followed by online service offerings, in particular those related to the online catalogue.
- Compared to 2001 there is higher awareness of free use of computers in Library branches reflecting the rollout of new services on Library computers, and of adult programming which reflects the increased number and promotion of programs such as Keep Toronto Reading.

- There is increasing awareness (68 percent) and satisfaction (73 percent) with adult programming. In addition, interesting programs and special events are also identified by non-users as a potential reason to use the Library.
- Respondents aged 65+ tend to have lower awareness of library services particularly the library's computer-related and online services.

Use of Library Services

- Newcomers continue to be major users of the Library system and residents with low incomes have high awareness and usage of core Library services reflecting the success of the Library's strategic priorities.
- As in 2001, the Library's collections continue to be the key reason for visiting a Library.
- There has been a significant increase since 2001 in the number of users who have accessed Library services online (31 percent) and the proportion of visitors who have used Library computers (55 percent). The primary reason for using a Library computer is to search the Library's online catalogue. Other key reasons are placing an item on hold/reserving materials and searching the Internet.

Attitudes towards Toronto Public Library

- 97 percent of residents believe that public libraries are an important resource for the community recognizing among other roles, the Library's support of elementary and high school students.
- 93 percent of respondents were satisfied with the overall quality of service provided by Toronto Public Library – when compared to 2001 there is increased satisfaction with the helpfulness of Library staff, the variety of books, new books and other materials available to borrow, the Library's website and the number of computers available for use.
- The Internet is having some impact on attitudes towards the relevance of the public library with an increase in the number of residents who never think of using the public library and their perception of how often the Library is used by others. Overall support for libraries in the community is very strong, however, there is slippage in individuals perception of the Library's relevance for them.

Attracting Non-Users to the Library

- 85 percent of non-users report having used a library at some point in time, with half describing themselves as frequent users in the past.
- The main reasons cited amongst non-users for not using a public library are: alternative options available (e.g., Internet, buy books) and lack of interest (e.g., no need, too busy) and to a lesser extent negative perceptions of the library (library does not offer materials of interest, and inconvenient location).
- Non-users report that recently published materials that were readily available, and programs and special events of interest would be some of the factors that may encourage more use of the library.

Hours of Service – Evenings and Sundays

The 2006 survey was also used to explore user preferences for the long-term expansion of hours as outlined in the vision for open hours. Questions focused specifically on evening hours and Sunday hours. The results will inform the priorities for implementing the Library's vision.

- Overall, respondents expressed reasonable satisfaction (76 percent) with the hours at their local Library.
- Higher interest was expressed for more Sundays hours compared to an interest in evening hours between 8:30 pm and midnight.
- In terms of specific Sunday hours, there is no clear-cut preferred option. Preferences were slightly stronger for libraries being open Sundays in more locations and Sunday evenings rather than Sunday mornings.

Awareness and Perceptions of Toronto Public Library Fundraising

- 78 percent of Torontonians think fundraising is an acceptable option for the Toronto Public Library to enhance and supplement services with 34 percent saying it is very acceptable. Findings show 90 percent of Torontonians support corporate fundraising to support library services that could not otherwise be funded.
- While awareness of Toronto Public Library Fundraising is limited (20 percent), public reaction to the Library soliciting funds is positive with about half (53 percent) report that they would be at least “somewhat” likely to donate to the Library, and just over one-in-ten (12 percent) reporting that they are “very” likely to do so. Within the context of charitable giving, this figure is consistent with other fundraisers.

Conclusion:

TPL’s Public Consultation Policy assists the Library in fulfilling its mission of providing “free and equitable library services which meet the changing needs of the people of Toronto”. A city-wide customer survey is a key means of ensuring that the Library keeps abreast of those changing needs at a system-level, and allows the key findings to guide service and program development.

As the Library embarks on a new strategic planning cycle in 2007, the results of this survey will be an important input in identifying areas of focus for the future.

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List of Attachments:

Not applicable.