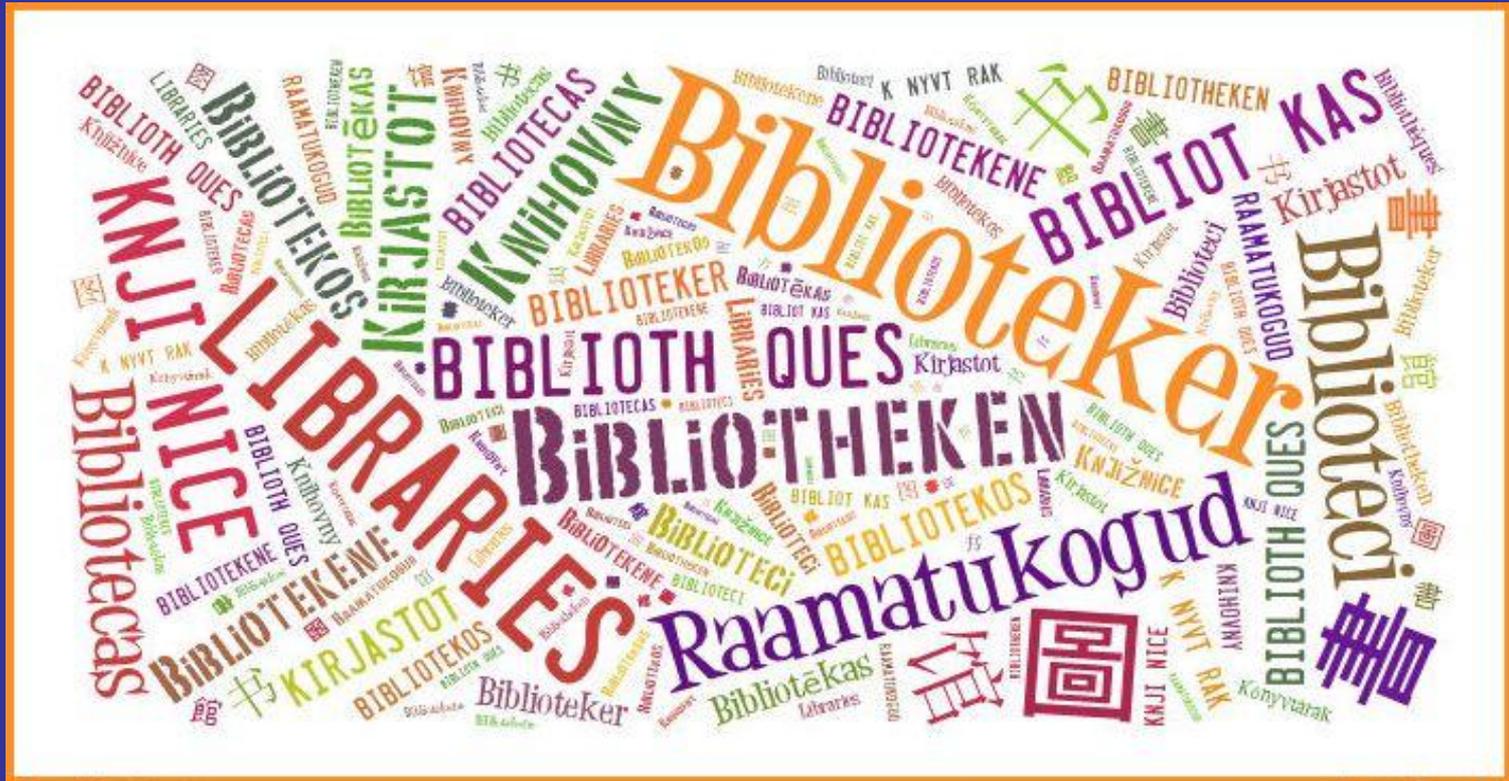


Libraries in Changing Times: A Global view

IFLA Metropolitan Libraries Survey

2010 results and future directions



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.



Met Lib Conference
Barcelona May 2012



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

Met Lib Survey 2010 Update

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

The Participants (Cont'd)

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	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	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%) 

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% ↑

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



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)

Hot Topics: Library Programs

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 a 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



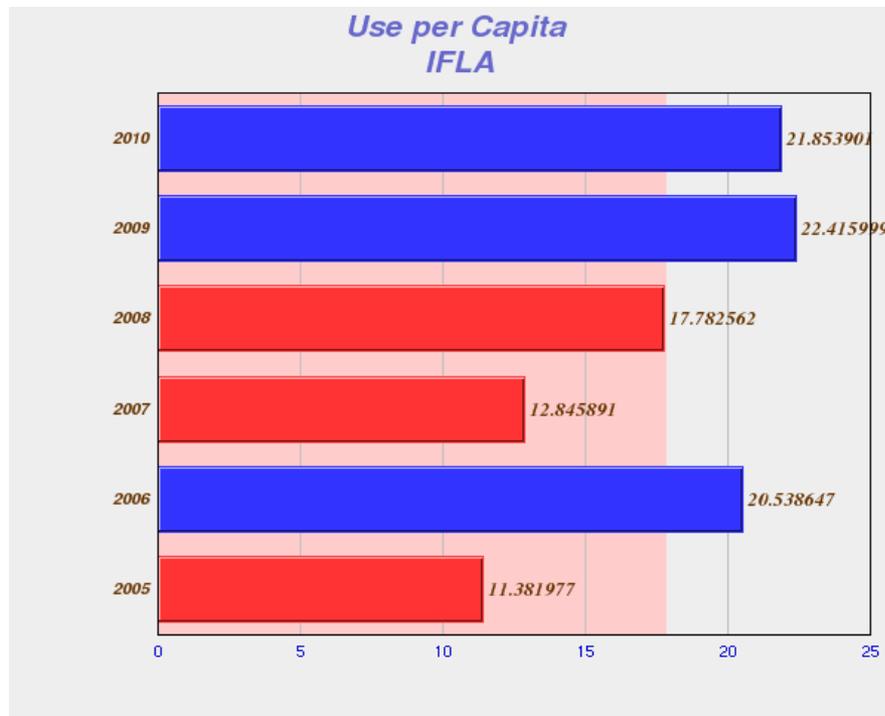
Five Year Trends (Cont'd)

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.



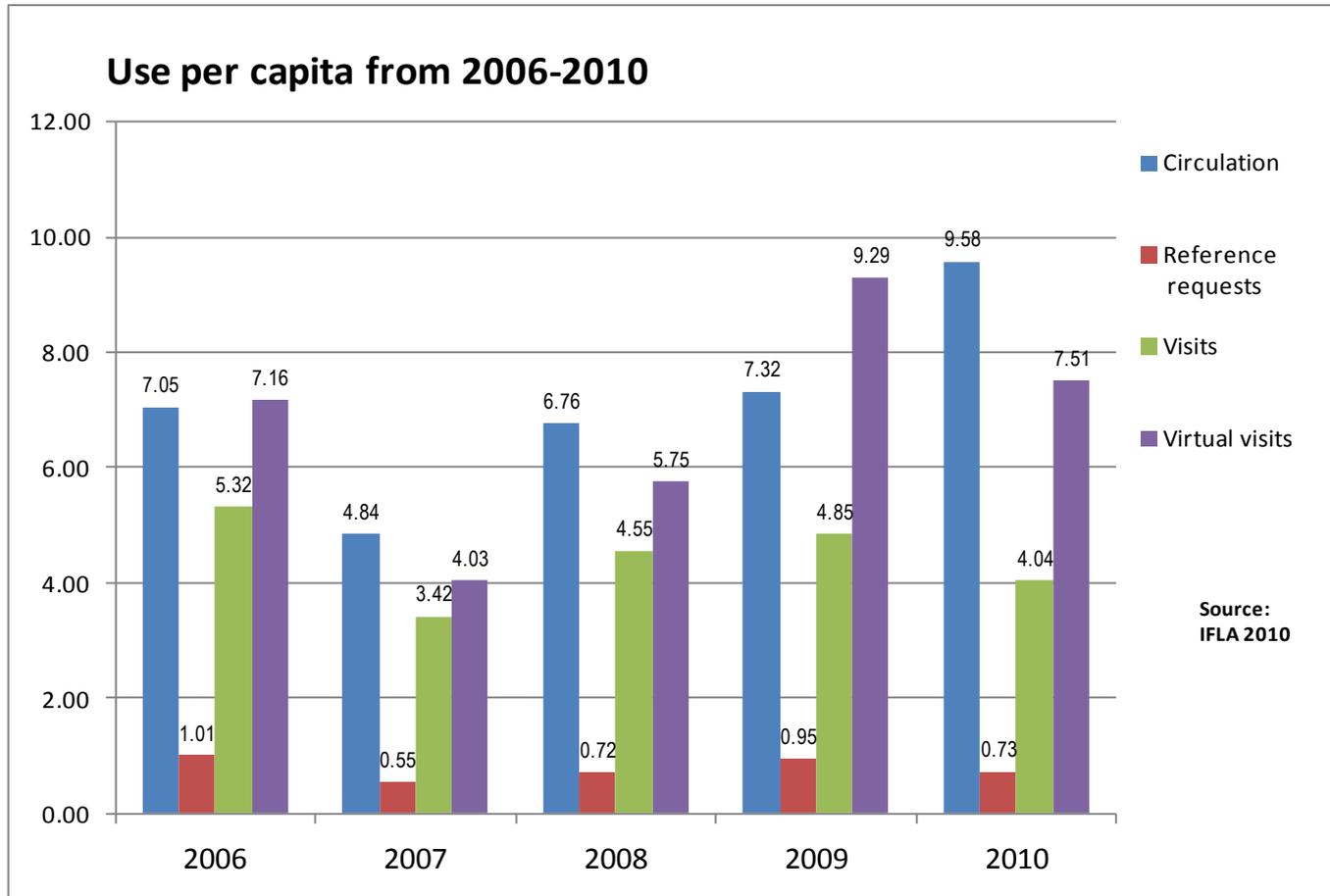
Blue – above average
Red = below average

Measures included: circulation, *reference requests, visits, virtual visits.

*For this survey, reference requests is aka information requests.

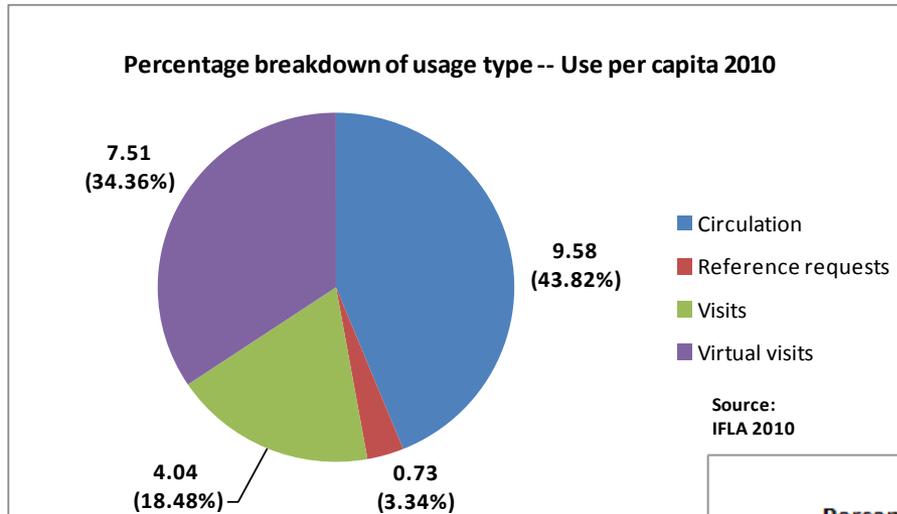
Overall Trends: Usage Type Comparisons

Comparison of Usage types from 2006-2010

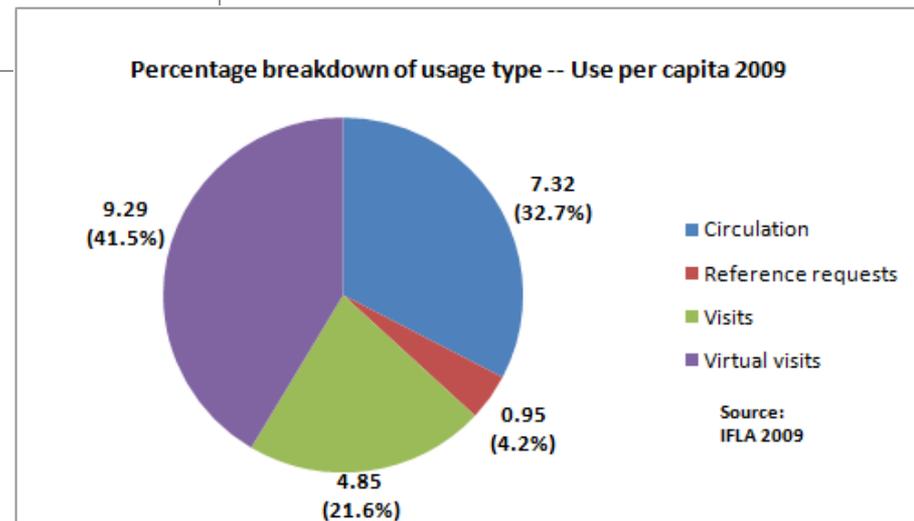


Overall Trends: Shift in user pattern

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



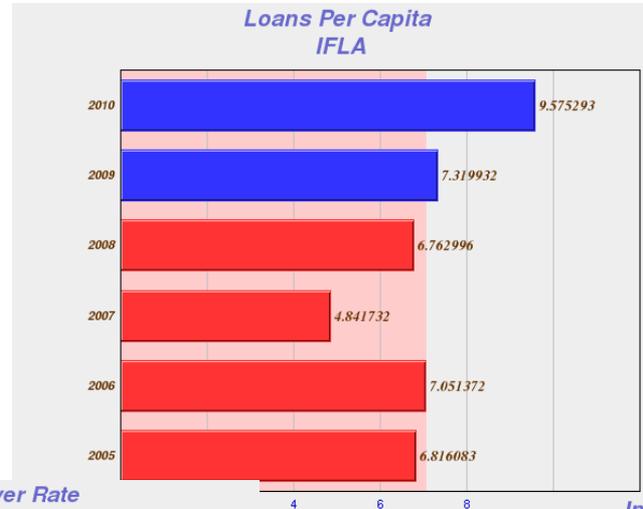
** Shanghai's large population (13% of total) and high circulation (36% of total) could have influenced the overall results.



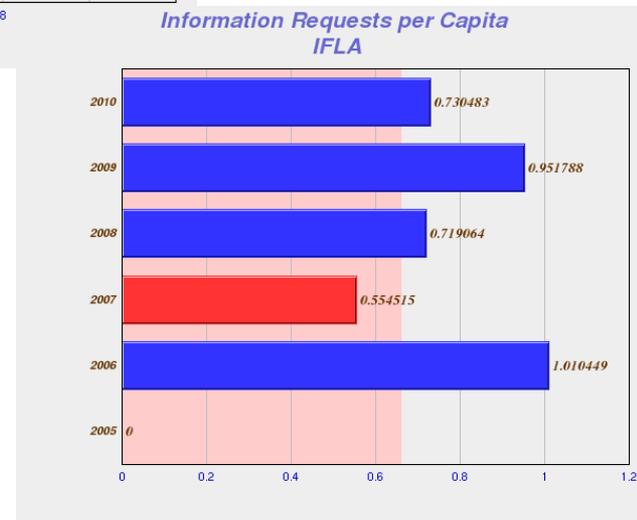
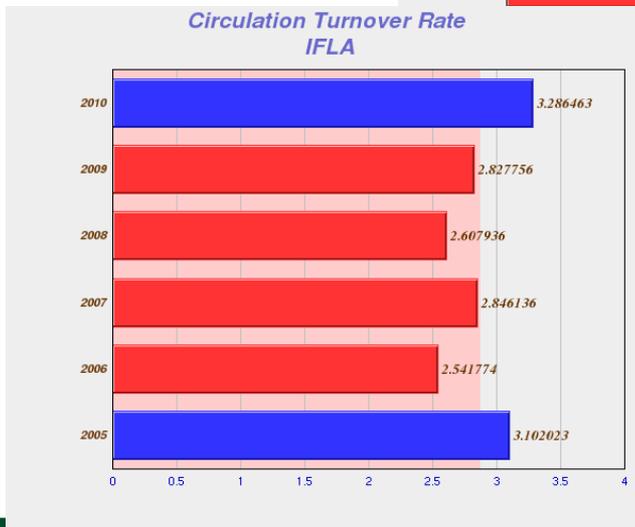
Traditional library usage

- 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.

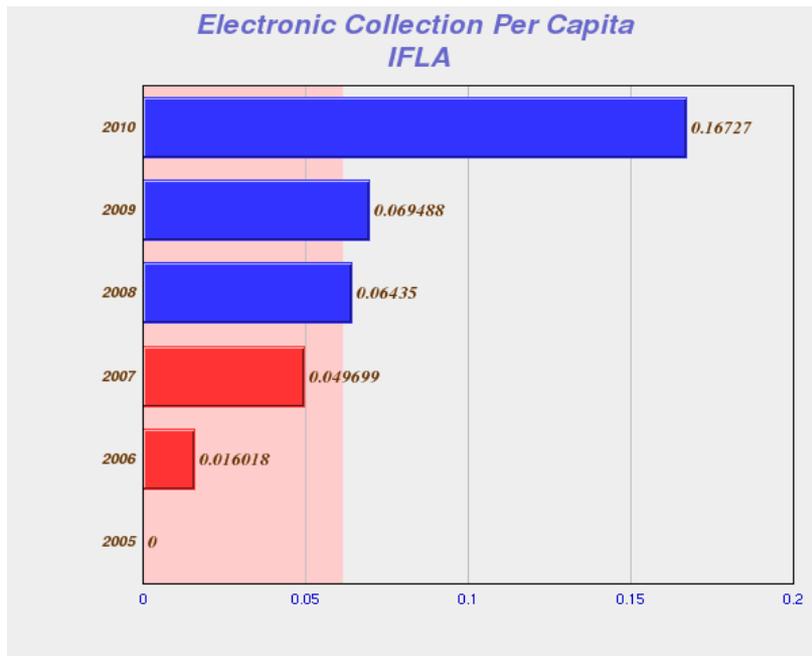
Traditional library usage



Blue – above average
Red = below average



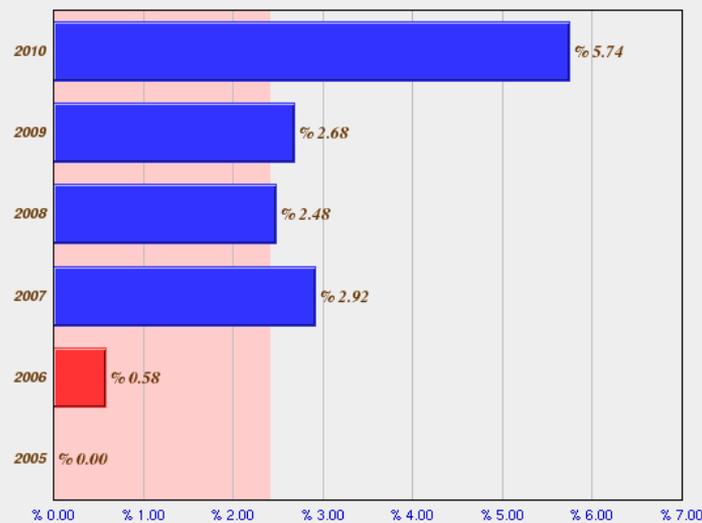
Electronic library usage: Collections



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 Materials as a Percentage of Total Collection
IFLA*

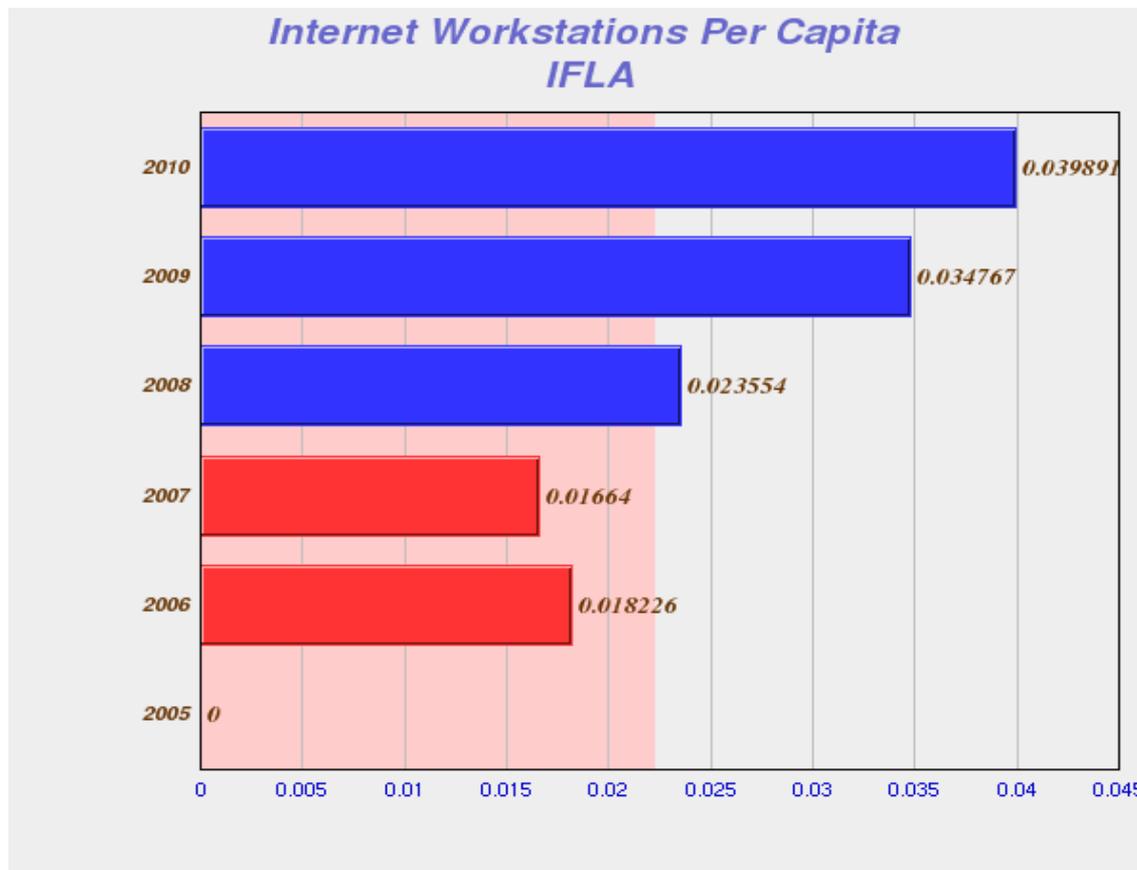


Blue – above average
Red = below average



Electronic library usage: Internet workstations

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%).

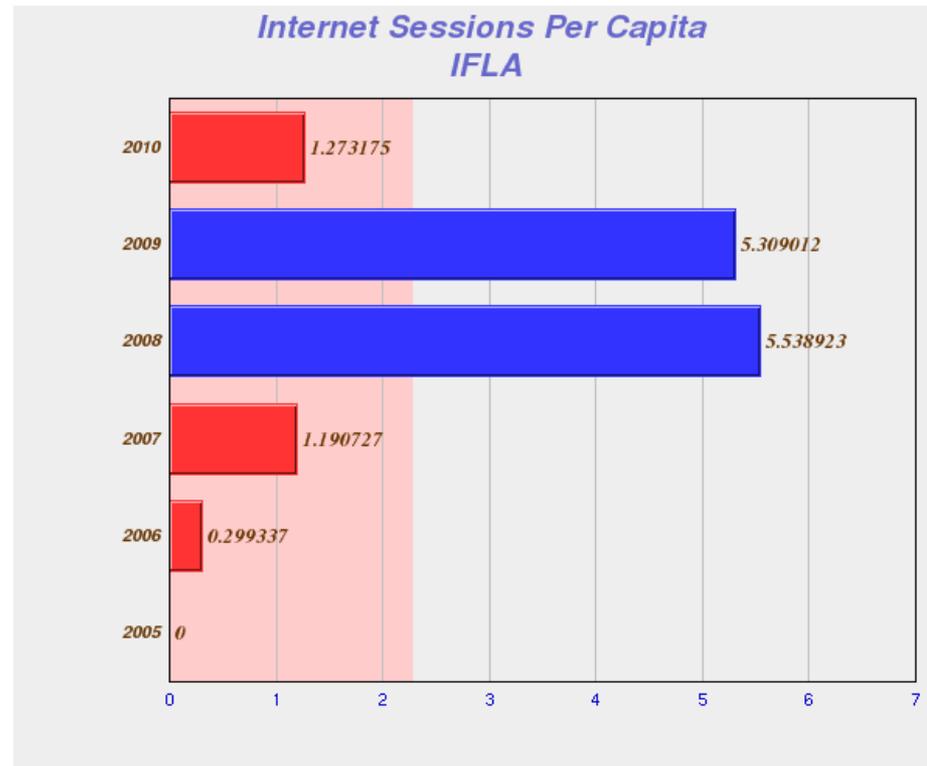


Blue – above average
Red = below average



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

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