

Strategic Plan 2020-2024: Results of Survey of Torontonians

Date:	November 25, 2019
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 by Toronto Public Library (TPL) in October 2019. The survey examined the 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 The Strategic Counsel for TPL and using a statistically valid random sample (1,260) of all Torontonians’ 18 years of age and older and a separate over-sample of 483 Torontonians using a linguistic panel with representation from residents whose mother tongue is one of Toronto’s top five languages spoken other than English and French.

The survey of Torontonians was part of the consultation plan for the Library’s new Strategic Plan 2020-2024. This is the fifth time the Library has conducted the survey, enabling comparisons over time.

Respondents to the survey are representative of Toronto’s population 18 years of age and older.

Highlights from the survey¹ include:

- Overall satisfaction with TPL remains very high (91%) among Toronto’s population
- Overall usage of TPL remains high with 68% of the population saying they had accessed library services in the last year

¹ Results are from the random sample of 1,260 Torontonians

- TPL website usage continues to increase with almost half (46%) of the population visiting the Library's website in the last year, a 4% increase from 2015
- Physical visits remain the most popular method of accessing library service with 62% of the population saying they had visited the Library in the last year, a 4% decline from 2015
- Overall awareness among library users of the wide range of services offered by TPL has been growing; the most notable change is in awareness of ebooks from 48% in 2012 to 89% in 2019
- Users and non-users agree that libraries are an important community resource and a vital community space for bringing people together (95% and 80% respectively)

FINANCIAL IMPACT

The costs associated with the development of the strategic plan, have been incorporated in the 2019 operating budget.

The Director, Finance & Treasurer has reviewed this financial impact statement and agrees 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 2020-2024 Strategic plan consultation process.

At its April 2019 meeting, the Library Board approved the Strategic Planning Steering Committee: Strategic Plan 2020-2024: Preliminary Environmental Scan and Consultation Plan report:

<https://www.torontopubliclibrary.ca/content/about-the-library/pdfs/board/meetings/2019/apr29/11-spsc-strat-plan-2020-2024-prel-environ-scan-and-consult-plan-combined.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 2020-2024 Strategic Plan consultation process. The focus of the survey is to gather demographic data about TPL's users, infrequent users, and non-users; and measure awareness of, attitude toward, needs and satisfaction with Toronto Public Library's services.

Four similar public surveys of Toronto residents were conducted in 2001, 2006, 2012, 2015. Baseline questions from the 2015 survey were repeated in the 2019 survey, with new questions developed to address new service areas and survey objectives. Survey results enable the Library to track awareness, usage, satisfaction and attitude about the Library over time and provide benchmark data to measure the progress of the Library's 2020-2024 Strategic Plan.

COMMENTS

The Strategic Counsel was retained, to conduct a survey that examined the awareness, usage, and satisfaction with TPL's services among residents 18 years of age and older, including both users and non-users.

Specific requirements of the 2019 research included:

- Analysis of trends from previous rounds of research be tracked where possible in the reporting
- The inclusion of key groups (specific language groups, underrepresented and equity seeking groups) in sufficient numbers for analytical purposes.

Specific research objectives for the 2019 survey included (but were not limited to):

- Measuring annual library usage, with use defined broadly to include visits to branches, website, phone, social media or other contacts
- Determining characteristics of users versus non-users and those who use the Library frequently
- Exploring attitudes toward the Library among users and non-users
- Measuring user satisfaction overall and with library services, including collections, programs, computers and wireless services, information services, access to library space (e.g. study space) and open hours
- Examining reasons for non-use
- Measuring interest in specific services the Library offers
- Understanding what services would Toronto residents like to see improved.

Methodology:

The survey included a statistically valid random proportionate sample of all Torontonians' 18 years of age and older. The survey was completed in field between October 18 and October 30, 2019.

The random probability sample of 1260 was done using a hybrid online/telephone methodology. Respondents decided if they would prefer to do the survey online or by telephone. The sample was large enough that key demographic groups could be analyzed separately including non-users, persons with disabilities, persons with low income, immigrants and recent immigrants, and members of the LGBTQ2S

communities. In total, 984 completed an online survey (78%), while 276 completed a telephone survey (22%). To ensure the sample is proportionate to the population of the city of Toronto, the data was weighted based on key census demographic data, including age, gender, region of the city and education.

A separate over-sample of 483 Torontonians was included in the 2019 study using a linguistic panel with representation from residents whose mother tongue is one of Toronto's top five languages spoken other than English and French (i.e. Cantonese, Mandarin, Spanish, Tagalog and Tamil). This sample was achieved using a recognized research panel designed specifically for this purpose. This sample will also provide insight into immigrants and newer immigrants regarding their awareness and use of library services. The results will also provide comparisons to the general survey of Toronto residents.

Key Findings:

Below are key findings from the random sample (1,260) of all Torontonians' 18 years of age and older. Further analysis and comparisons of the results from the key groups (specific language groups, under-represented and equity-seeking groups) will be included in the presentation to the Library Board on November 25, 2019.

Long-Term Library Usage Trends (2001-2019)

Since the Library first conducted this survey in 2001, there have been significant changes in the service environment. The growth in online information, e-content, and self-service options have changed usage patterns. While overall usage of branches and online services remain high, patterns of use have changed.

Areas of growth include:

- Accessing the Library via the TPL website (22% in 2001 vs. 46% in 2019)
- Attendance of programs or events (11% in 2001 vs. 24% in 2019)
- Finding a quiet place to study or read in the Library (31% in 2001 vs. 36% in 2019)
- Taking a child to the Library (22% in 2001 vs. 27% in 2019).

Areas of decline include:

- Getting information on a topic of personal interest (70% in 2001 vs. 30% in 2019)
- In-branch browsing of books to borrow (82% in 2001 to 64% in 2019)
- Reading newspapers and magazines in branch (41% in 2001 to 19% in 2019).

Satisfaction

- Overall satisfaction with TPL remains very high (91%)

- The highest overall satisfaction levels are found among those living in Canada less than 10 years (98%), those who have downloaded e-books (97%), medium and heavier library users (95%) and those under 25 years of age (95%)
- Satisfaction with TPL also remains strong across a range of services. The highest satisfaction levels were found for: knowledge of library staff (92%), helpfulness of library staff (90%), TPL website (90%), variety of books and other materials to borrow (88%); and cleanliness of the Library (88%).

Usage

- Overall usage of TPL remains high with 68% of Torontonians saying they have accessed the Library in the last year in 2019, down slightly from 70% in 2015
- TPL website usage continues to increase with half of the population (40% in 2015 to 46% in 2019) reporting usage in the last year
- Physical visits to the Library (66% in 2015 to 62% in 2019) and telephone calls to the Library (11% in 2015 to 7% in 2019) have declined as transactions migrate online to self service options
- Those most likely to be library users include: those under 55 years of age and especially those aged 35-45 years of age, stay-at-home caregivers, household income of less than \$30,000 and between \$70,000 to \$99,999, students, those with bachelor's degree and higher, women, new immigrants, and those working part-time
- Those least likely to be library users include: those 55 years of age and over, those with high school or less education, retirees, and men
- There is now more medium to light usage (3-10 times a year) than frequent usage (11+ times), those 65 years of age being the most frequent users and those under 35 years of age are the least likely to be frequent users

Awareness

- Overall awareness among library users of the wide range of services offered by TPL has been growing; the most notable change is in awareness of ebooks from 48% in 2012 to 89% in 2019

Attitudes toward the Library

- Overall, providing a safe place for people to spend time, creating educational opportunities and promoting a sense of community are identified by users and non-users as the main ways in which the public library can contribute to the community
- Both users and non-users agree regarding the important social role of libraries. Large proportions agree that libraries:
 - Are an important community resource (95% users and 80% non-users)

- Are a vital community space for bringing people together (87% users and 71% non-users)
- Support low income residents and immigrant communities (86% users and 75% non-users)
- Very few agree that libraries are no longer relevant (6% users and 16% non-users).

Non-Users

- The majority of non-users report having used public libraries as children
- The ability to access information/entertainment online from home is the main reason for not being a library user today
- The availability of really good programs/events, access to up-to-date technology and providing access to the most recently published books would help to drive library usage among non-users

Next Steps

Library staff will further analyze the results of the survey and use them to inform actions and activities for the new strategic plan and service planning, including marketing and engagement 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.

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A PRESENTATION TO THE BOARD



2019 Survey Among Toronto Residents

November 2019

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Background, Objectives and Methodology

The Strategic Counsel is pleased to present the following research findings from a survey of Torontonians to the Toronto Public Library (TPL).

Historically, survey data has been used by TPL to augment performance measures established by the Library and to provide qualitative measures. The Toronto survey has been conducted for TPL in 2001, 2006, 2012 and 2015.

The data gathered from the 2019 Toronto survey is meant to assist the Library in evidence-based decision-making and will inform development of the Library's 2020-2024 Strategic Plan.

Specific requirements of the 2019 research included:

- Analysis of trends from previous rounds of research be tracked where possible in the reporting; and,
- The inclusion of key groups (specific language groups, underrepresented and equity seeking groups) in sufficient numbers for analytical purposes.

Specific research objectives for the 2019 survey included (but were not limited to):

- Measuring annual Library usage, with use defined broadly to include visits to branches, website, phone, social media or other contacts;
- Determining characteristics of users versus non-users and those who use the library frequently;
- Exploring attitudes toward the Library among users and non-users;
- Measuring user satisfaction overall and with Library services, including collections, programs, computers and wireless services, information services, access to library space (e.g. study space) and open hours;
- Examining reasons for non-use;
- Measuring interest in specific services the Library offers; and
- Understanding what services would Toronto residents like to see improved.

The 2019 survey was conducted by The Strategic Counsel for TPL and included a statistically valid random proportionate sample of all Torontonians' 18 years of age and older. It was completed in field between October 18th and October 30th, 2019.

The random probability sample of **1260** was done using a hybrid online/telephone methodology. Respondents were allowed to decide if they would prefer to do the survey online or by telephone with this methodology. The sample was large enough that key demographic groups could be analysed separately including: non-users, persons with a disability, persons with low income, immigrants and especially newer immigrants and members of the LGBTQ2S communities.

In total, 984 completed an online survey (78%), while 276 completed a telephone survey (22%).

The margin of error for this sample of **1260** is +/- 3 percentage points, 19 times out of 20 (95% confidence interval).

To ensure the sample is proportionate to the population of the city of Toronto, the data were weighted based on key census demographic data, including: Age, Gender, Region of the City and Education.

A separate over-sample of **483** Torontonians was included in the 2019 study using a linguistic panel with representation from residents whose mother tongue is one of Toronto's top five languages spoken other than English and French (i.e. Cantonese, Mandarin, Spanish, Tagalog and Tamil). This sample was achieved using a recognized research panel designed specifically for this purpose. This sample will also provide insight into immigrants and newer immigrants regarding their awareness and use of library services. The results will also provide comparisons to the general survey of Toronto residents.

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Key Findings

Key Findings: Satisfaction with TPL

1

Overall satisfaction with TPL remains very high (91%).

The highest overall satisfaction levels are among:

- New immigrants (those living in Canada <10 years) (98%)
- Those who have downloaded e-books (97%)
- Medium and heavier library users (95%)
- Youth (18 to 24 years of age) (95%)
- Persons with low income (93%)

2

Satisfaction with TPL also remains high across many service areas.

Highest satisfaction levels are for:

- Knowledge of library staff (92%)
- Helpfulness of library staff (90%)
- TPL website (90%)
- Variety of books and other materials to borrow (88%)
- Attractiveness and cleanliness of the library (88%)

Key Findings: Usage of TPL

TPL continues to provide services of value to the majority of residents of Toronto.

Overall reported usage remains high:

- 68% in 2019 say they have accessed the library in the last year, compared with 70% in 2015
- Physical visits to the library also remain high, 62% in 2019 compared with 66% in 2015

TPL Website usage continues to increase – Up to 46% from 40% in 2015 reporting usage in the last year.

Higher reported usage is found among:

- LGBTQ2S communities (56%)
- Persons with a disability (50%)

Key Findings: Demographic Characteristics of TPL Users

4 **A strength of the TPL is that almost all key demographic groups are TPL users.**

Those most likely to be TPL users are:

- Those under 55 years of age (73%), especially 35-44 years of age (78%)
- Youth (18 to 24 years of age) (75%)
- Stay at home caregivers (86%)
- Household Income <\$24,999 (76%)
- Household Income \$75,000 to \$99,999 (75%)
- Students (79%)
- NET Bachelor's Degree/Post-Graduate (76%)
- Women (72%)
- New immigrants (Living in Canada <10 years) (80%)
- Those working part time (80%)
- LGBTQ2S communities (75%)

5 **Those least likely to use include:**

- Those ages 55 year of age and up (59%)
- Those with High School or less education (61%)
- Retirees (62%)
- Men (65%)

Key Findings: Changes in TPL Usage Over Time

Since tracking began in 2001, there have been changes in the types of Library usage reported:

Areas of growth include:

- Find a quiet place to study or read: **31%** (2001) to **36%** (2019)
- Personally attend a program/class/event: **11%** (2001) to **24%** (2019)
- Take a child to the library: **22%** (2001) to **27%** (2019)

Areas of decline include:

- To get information on a topic of interest: **70%** (2001) to **30%** (2019)
- To find specific information for school or work: **47%** (2006) to **20%** (2019)
- Read newspapers/magazines: **41%** (2001) to **19%** (2019)



Key Findings: Importance of Awareness

7 The continuing high level of overall usage may be attributable to TPL's ability to build awareness of their services.

This trend is reflected with growing awareness (48% in 2012 and 89% in 2019) and usage (38%) of **eBooks to download**

However, more efforts should be made to build awareness of **access to specialized technology** (36% in 2015 and 48% in 2019)

Key Findings: Frequency of Physical Library Visits

8 While overall usage remains high, frequent usage has declined and may be an age-related phenomenon.

There is now more medium to light usage (3 – 10 times a year) than frequent usage (11+ times).

Usage varies significantly by age:

Those 65 years+ are the most frequent users (46% 11+ times a year or more) despite being less likely to be TPL users overall (61%).

Those 18 to 24 years of age are the least likely to be frequent users (26% 11+ times a year or more) despite being among the most likely to use TPL overall (75%).

Key Findings: Awareness of Services Offered By TPL

There has been growing awareness among library users of the wide range of services offered by TPL.

Awareness of many library services is high and has grown in some areas since 2015:

- Access to e-books (**80%** in 2015/**89%** in 2019)
- Wireless access (**79%** 2015/**85%** 2019)
- Meeting rooms (**57%** 2015/**83%** 2019)
- Access to e-magazine (**66%** 2015/**73%** 2019)
- Resources for job-seekers (**65%** 2015/**71%** 2019)
- Free one-on-one help from Library staff (**56%** 2015/**83%** 2019)
- Access to specialized technology (**36%** 2015/**48%** 2019)

Continued promotion of library services is important.

Key Findings: Breadth And Depth Of TPL Offerings

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Ensuring a wide range of services that appeal to diverse range of demographic groups is key to maintaining/growing TPL usage.

Key usage by various demographic groups are:

- Browsing for books or picking up an item on hold is especially high for those 45 years and above
- Taking a child to the library is high among those 35 – 54 years of age
- Scanning and use of printers is high among those under Youth (those 18 to 24 years of age)
- Use of the wireless internet is highest among those 18 to 44 years of age

Key Findings: E-books/E-audiobooks as a Growth Area for TPL

Accessing/downloading e-books or e-audiobooks is an area of growing importance.

In all, **38% of TPL users downloaded an e-book or e-audiobook in the last year.**

E-books and e-audio books appear to offer a growth opportunity:

- All age groups indicate they have made use of this service
- Especially, those ages 45 to 54 years (52%)

Key Findings: Reasons For Non-Use

12
Many non-users appear to not use the TPL because its services are not of interest to them or simply do not think about using a library.

Non-users are quite positive about libraries, but do not see them as being useful to them:

- 43% note the ability to access information and entertainment online/from home as a main reason for not using the library).

On an unaided basis, most non-users do not know what they would like to see from TPL (57% Don't know). Many (56%) non-users also report not thinking about using a library.

Continuing to raise awareness of libraries as an option for a variety of activities and reminding Torontonians of the range of services TPL provides is important to future usage.

Key Findings: Interest in TPL Offerings Among Non-Users

13

On an aided basis, non-users are clearly interested in a number of things currently available through TPL.

They expressed interest in some TPL services:

- Best-selling books (60%)
- Access to online research databases (58%)
- Free use of Wi-Fi (55%)
- Free use of computers with Internet (54%)
- Help with school assignments for children and teens (53%)
- Access to library space for meetings and community events (52%)
- Access to library space to study, work or read (51%)
- Access to e-books and e-audiobooks (51%)

Key Findings: Importance of TPL's Social Role In The Community

14
The public overall, both users and non-users, agree about the important social role of libraries and services provided.

Large proportions agree that libraries:

- Are an important community resource (95% and 80%, respectively)
- Are a vital community space for bringing people together (87% and 71%, respectively)
- Support low income residents and communities (86% and 75%, respectively)

Very few believe libraries are no longer relevant (6% and 16%, respectively)

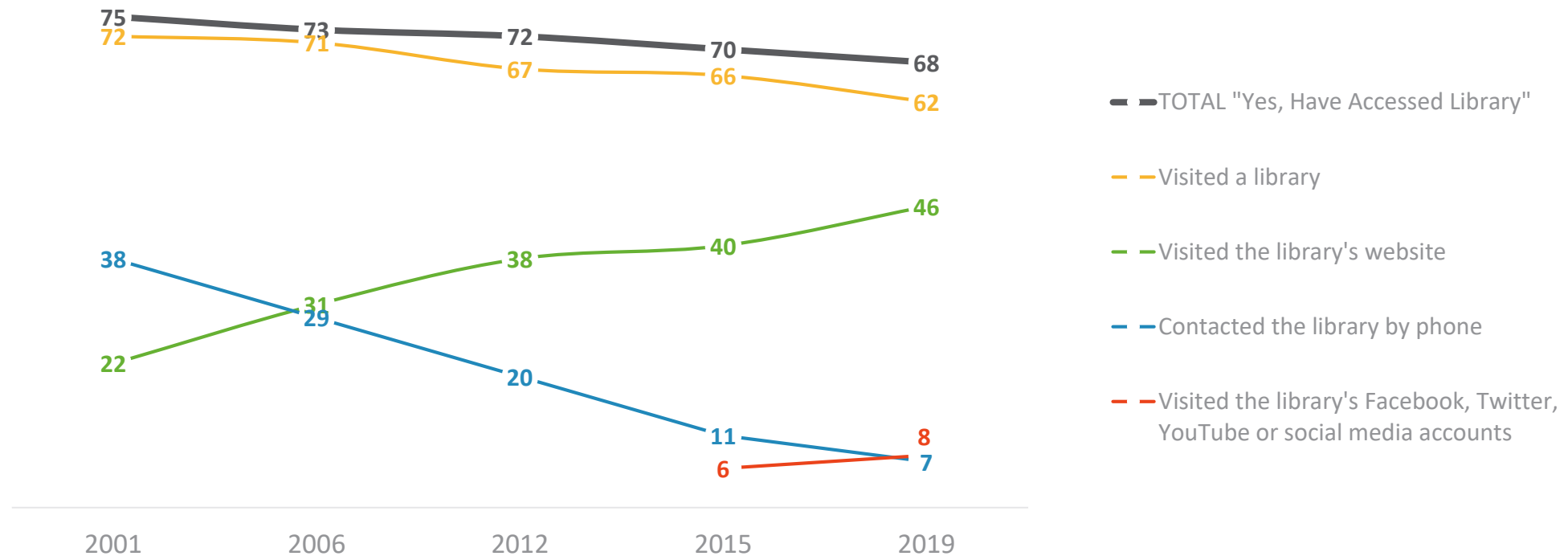
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Toronto Public Library – Overall Usage

INCIDENCE OF LIBRARY USAGE

The incidence of physically visiting a TPL branch continues to decline in 2019 (marginally), but accessing the TPL website continues to increase

- Contacting TPL by telephone also continues to decline in 2019



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?

Base: Total sample (2001 n=1250; 2006 n=1255; 2012 n=1220; 2015 n=1204; 2019 n=1260)

DEMOGRAPHIC PROFILE: TPL USAGE BY AGE AND INCOME

Youth (18 to 24 years of age), those who are 35 to 44 years of age and lower income and mid-income Torontonians are more likely to be Library Users

- Older residents are less inclined to be users

	Age							Income					
	TOTAL	(Youth) 18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 years or older	Less than \$24,999	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000 or more
	N=1260	N=80	N=308	N=207	N=218	N=188	N=223	N=125	N=185	N=180	N=175	N=188	N=215
	%	%	%	%	%	%	%	%	%	%	%	%	%
Public Library Users	68	75	71	78	71	60	59	76	66	69	75	65	67
Public Library Non-Users	32	25	29	22	29	40	41	25	35	30	25	35	33

Note: Don't know/prefer not to answer responses are not shown and have been excluded from the calculations.

DEMOGRAPHIC PROFILE: TPL USAGE BY EDUCATION, GENDER AND IMMIGRATION STATUS

University/College graduates, women and newer immigrants (living in Canada <10 years) are more likely to be Library Users

	TOTAL	Education			Gender		Canadian Immigrants		# Years In Canada	
		High school or less	Some College/ University	University/ College Graduate	Male	Female	Non-immigrants	Immigrants	10 years or fewer	More than ten years
		N=1260	N=154	N=585	N=502	N=575	N=656	N=913	N=344	N=80
%	%	%	%	%	%	%	%	%	%	
Public Library Users	68	61	64	75	65	72	68	70	80	67
Public Library Non-Users	32	39	36	25	35	28	32	30	20	33

Note: Don't know/prefer not to answer responses are not shown and have been excluded from the calculations.

DEMOGRAPHIC PROFILE: TPL USAGE BY EMPLOYMENT STATUS

Stay at home caregivers/homemakers, students and those working part-time are more likely to be Library Users

- The unemployed and retired are less inclined to be Library users

	Employment Status								
		Work full time	Work part time	Retired	Student	Unemployed and looking for work	Homemaker/ stay at home caregiver	Unemployed and not looking for work	Other
	N=1260	N=641	N=154	N=271	N=110	N=54	N=38	N=29	N=46
Total	%	%	%	%	%	%	%	%	
Public Library Users	68	67	79	62	79	63	86	59	74
Public Library Non-Users	32	33	22	38	22	37	11	41	26

Note: Don't know/prefer not to answer responses are not shown and have been excluded from the calculations.

DEMOGRAPHIC PROFILE: TPL USAGE BY FREQUENCY OF USE

Seniors (Those 65 years of age or older) are less likely overall to be users, but they are also the heaviest users.

	Age						
	Total	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 years or older
	N=721	N=55	N=177	N=146	N=115	N=98	N=115
	%	%	%	%	%	%	%
Light/infrequent users (1 – 2 times/year)	21	22	27	20	20	15	15
Medium/less frequent users (3 – 10 times/year)	47	53	50	47	39	54	39
Heavy/Frequent users (11+ times/year)	33	26	23	33	41	31	46

Q2. Do you recall, how many times you have personally visited a Toronto Public Library branch in the past twelve months?
 Base: Those who have visited a public library in the past year (2001 n=905; 2006 n=889; 2012 n=856; 2015 n=798; 2019 n=826)
 NOTE: Base excludes DK/NA and mentions of “0”

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Toronto Public Library – Specific Types of Usage

REASON FOR VISITING A LIBRARY – USERS

Overall usage compared with 2015 is down across a wide range of services. However, browsing for books to borrow, picking up items on hold and finding a quiet place to study or read continue to be the top three things Library Users are doing when they visit

	2001	2006	2012	2015	2019
Browse for books to borrow	82	83	61	73	64
Pick up specific items that are on hold		59	48	68	52
Find a quiet place to study or read	31	42	30	43	36
Get information on a topic of personal interest	70	68	37	46	30
Take a child to the library	22	36	28	32	27
Use the wireless internet				32	27
Personally attend a program, class or event	11	15	15	28	24
Browse for CDs, DVDs to borrow	37	42	61	38	22
Use the printer, scanner or photocopier					22
Use the computers	33	27	29	31	20
Find specific information for school or work		47	25	31	20
Read newspapers and magazines	41	35	26	30	19
Meet with a group/have a meeting			10	19	18
Receive advice or consult with library staff				26	17
Use the library as my work/office space			18		16
Use specialized technology					6
Other	12	11	1	6	4

Q6. When you visit the library is this usually to...

Base: Those who have visited a public library in the past year (2001 n=905; 2006 n=889; 2012 n=856; 2015 n=798; 2019 n=827)

TYPES OF PROGRAMS, CLASSES OR EVENTS ATTENDED

Among those who attended a program class or event, author talks/lectures and culture, arts & entertainment are the main types cited

	2019
Author Talks and Lectures	39
Culture, Arts & Entertainment	32
Exhibits and Displays	20
Health & Wellness	20
Hobbies, Crafts & Games	19
Reading Programs & Story Times	16
Science & Technology	16
Book Clubs and Writers' Groups	12
Computer & Library Training	10
History & Genealogy	9
Personal Finance Programs	8
Career & Job Search Help	7
Small Business Programs	5
ESL & Newcomers Programs	4
Public/Municipal/Community meetings	2
Children's programs	2
Other	13
Don't know/can't recall	8

Q9. Do you recall the name or type of programs, classes or events you attended in the last year? (Check all that apply)

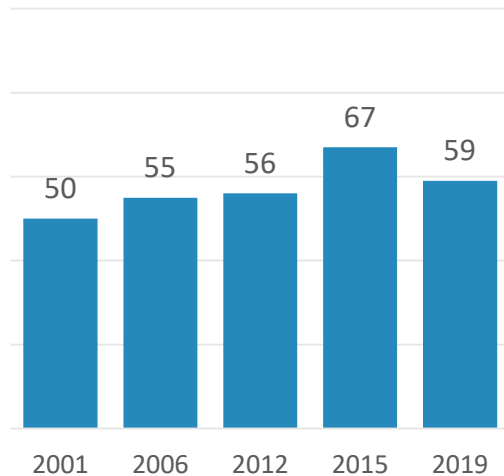
Base: Those who have attended a program, class or event (2019 n=193)

USAGE OF LIBRARY COMPUTERS

The reported incidence of using one of the Library's computers when visiting is down in 2019 to just under six-in-ten

- Accessing the Library's website, accessing online research databases, using email and searching the internet for personal interest are the main types of computer usage cited in 2019

Have used one of the library's computers for any purpose



How Library Computers are Used

	2006	2012	2015	2019
To access the library's website			48	52
To access online research databases and learning resources			47	33
To use email*	21	47	43	31
To search the internet for personal interest	42	50	47	30
To search the Internet for school or work	40	41	38	24
To use word processing or other software	14	33	25	21
To access government services or resources				18
To look for or apply to a job				15
To use social networks such as Facebook/Twitter*	n/a	21	15	8
To watch online videos or music				7
To access print/scan equipment				7
To play online games			5	5
To upload or download music or videos			3	4
Other	9**	2**	7	8
DK/NA/Ref	1	2	-	1

Q10. When you have visited a public library have you used one of the library's computers for any purpose?

Base: Those who have visited a public library in the past year (2001 n=905; 2006 n=889; 2012 n=829; 2015 n=798; 2019 n=827)

Q11. When you have used computers at the library, what did you use them for?

Base: Those who have used computers at the library (2006 n=488; 2012 n=601; 2015 n=532; 2019 n=484)

* 2006: To use email/chat rooms; 2012: to use social networks such as Facebook, Twitter, Flickr

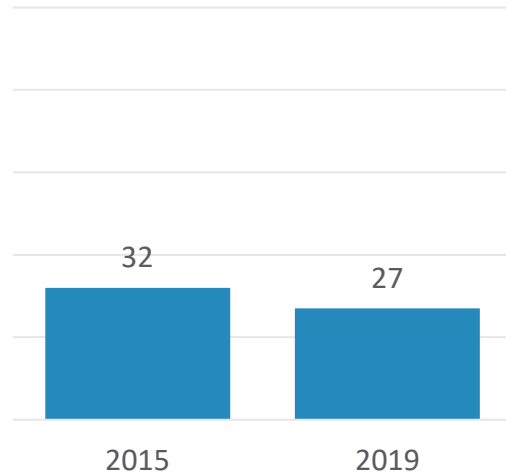
** Other includes mentions of 2% or less

USAGE OF WIRELESS INTERNET AT THE LIBRARY

Reported usage of wireless Internet at the Library is down in 2019 to just under three-in-ten

- Email, searching the Internet for personal interest and searching the Internet for school or work continue to be the main types of usage cited

Have used wireless internet at the library



How Library Wireless Internet is Used

	2015	2019
To use email	72	67
To search the internet for personal interest	72	63
To search to Internet for school or work	62	47
To access the library's website	40	38
To use social networks such as Facebook/Twitter	37	32
To access online research databases and learning resources	51	31
To access government services or resources	n/a	27
To look for or apply to a job	n/a	27
To watch online videos or music	17	25
To upload or download music or videos	5	12
To play online games	8	5

Q6(11). When you visit the library is this usually to ... (item 11: use the wireless internet)?

Base: Library Visitors (2015 n=798, 2019 n=827)

Q12. Previously you indicated that you used the wireless internet at the library, what did you use it for?

Base: Those who have used wireless internet at the library (2015 n=251; 2019 n=223)

DEMOGRAPHIC PROFILE: TPL WI-FI/COMPUTER USAGE BY AGE AND INCOME

Those between the ages of 25 and 44 and those with annual household incomes of less than \$49,999 are the most likely to be using a TPL computer when they visit the Library

- Youth and those with an annual household income of less than \$24,999 are the most likely to be using Wi-Fi

	TOTAL Library Users	Age						Income					
		(Youth) 18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 years or older	Less than \$24,999	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$99,999	\$100,000 to \$149,999	\$150,000 or more
		Bases vary											
	N=828	%	%	%	%	%	%	%	%	%	%	%	%
Library Computer Users	59	60	65	65	55	56	47	70	68	60	54	54	56
Library Wi-Fi Users	27	46	33	31	25	15	16	52	28	26	28	29	11

Note: Don't know/prefer not to answer responses are not shown and have been excluded from the calculations.

DEMOGRAPHIC PROFILE: TPL WI-FI/COMPUTER USAGE BY EDUCATION, GENDER AND IMMIGRATION STATUS

Males are more likely than females to use a computer when they visit a TPL branch

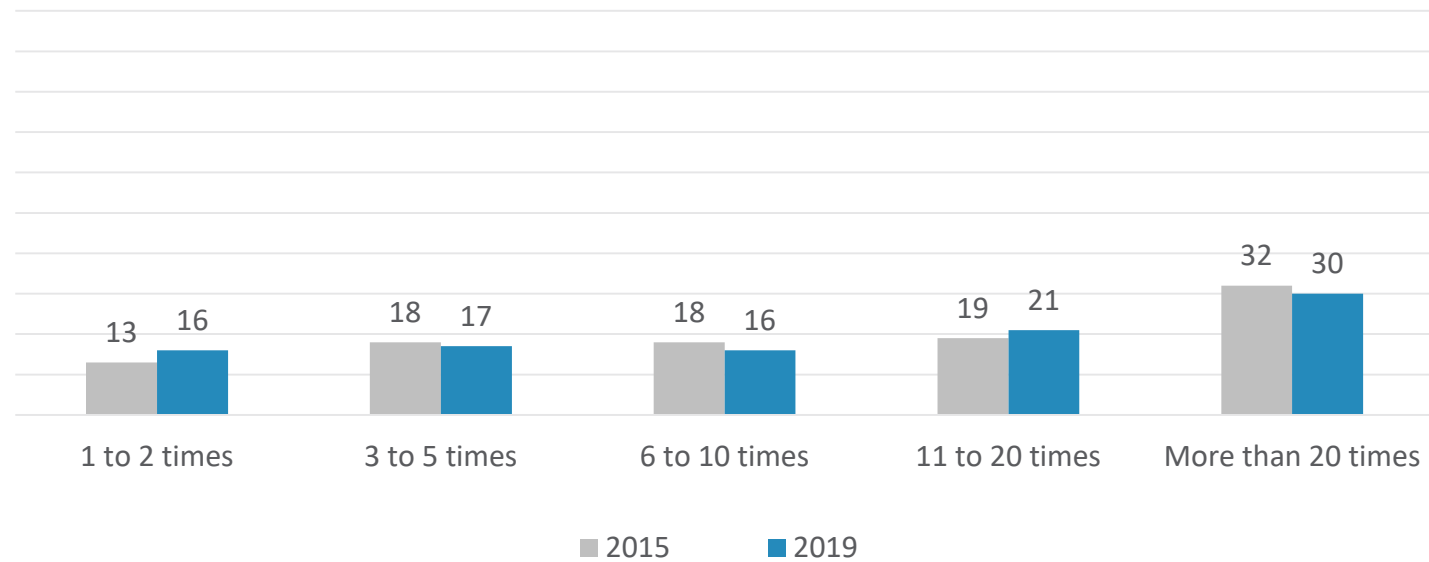
- Immigrants, particularly those who have lived in Canada < 10 years are more inclined than those born in Canada to use Wi-Fi when they visit a TPL branch

	TOTAL Library Users N=827	Education			Gender		Canadian Immigrants		# Years In Canada	
		High school or less	Some College/ University	University/ College Graduate	Male	Female	Non- immigrants (Born in Canada)	Immigrants (Not Born in Canada)	10 years or fewer	More than ten years
	%	%	%	%	%	%	%	%	%	%
Library Computer Users	59	51	56	61	63	55	59	59	61	58
Library Wi-Fi Users	27	26	24	28	25	28	23	38	58	30

Note: Don't know/prefer not to answer responses are not shown and have been excluded from the calculations.

FREQUENCY OF ACCESSING TPL WEBSITE

The frequency of accessing the TPL website remains relatively stable in 2019 versus 2015



Q13. You indicated earlier that in the past year you had accessed the Toronto Public Library website. How often have you done this in the last twelve months?

Base: Have visited the library's website (2015 n=478; 2019 n=590)

TPL WEBSITE SERVICES USED

Accessing account, placing an item on hold and searching the catalogue for items are the main TPL website services accessed in 2019

- Caution should be used when making wave-over-wave comparisons – a number of new items were added to the list in 2019 which will impact responses

	2001	2006	2012	2015	2019
Accessed your library account (previously: "reviewed your customer record")	33	53	43	-	68
Placed an item on hold	50	67	55	79	66
Searched the library's catalogue for an item	75	83	76	82	62
Found out about the library's hours and locations (previously "services")	47	65	63	76	61
Renewed an item	48	65	47	77	60
Searched the library's e-book and e-audiobook collections	-	-	-	54	47
Found out about the library's programs and services	-	-	-	-	38
Renewed your library card	-	-	-	-	33
Accessed the library's digital archive	n/a	n/a	12	-	25
Accessed online research databases and learning resources	-	-	-	33	22
Paid a fine	-	-	-	15	18
Accessed e-magazine services (previously: "accessed newspaper and magazine articles online")	36	19	10	17	13
Accessed the library's printing services	-	-	-	-	10
Streamed music and video services	-	-	-	9	10
Contacted library staff	-	-	-	-	10
Reserved a computer	-	-	-	-	7
Booked a room (e.g., meeting rooms and auditoriums)	-	-	-	-	4
Other	4	9	1	4	2

Q15. And what services on the library's website have you made use of? Have you...

Base: Those who have accessed the Toronto Public Library website (2001 n=272, 2006 n=387, 2012 n=692, 2015 n=478, 2019 n=590)

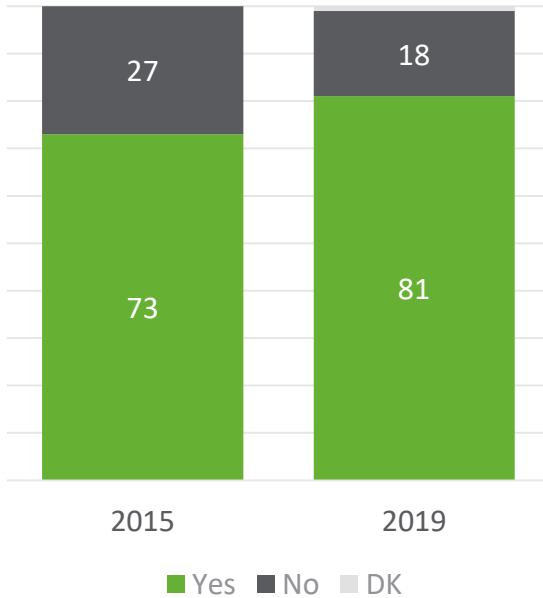
DOWNLOADING E-BOOKS/E-AUDIOBOOKS FROM

Among those who report searching the Library's e-books and e-audiobooks, the overall incidence of downloading these has increased significantly in 2019 versus 2015

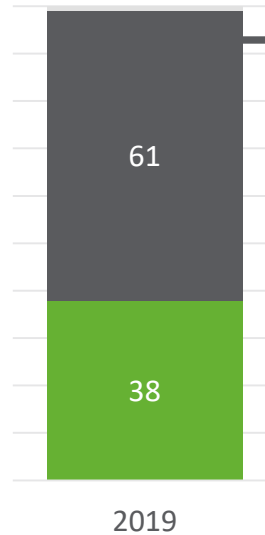
- A preference for reading traditional print books, lack of interest and lack of knowledge (NET how to use/about it) are the main reasons for not having done so

Have downloaded an e-book or e-audiobook from Toronto Public Library

Among those who have searched the library's e-book and e-audiobook collections



Among Library Users



Why not? →

	2019 %
Prefer reading print books	59
Not interested	29
Do not know how to use it	15
Do not know about it	11
The wait times to access e-books/e-audiobooks from the Toronto Public Library	5
Access issues: do not have a computer/e-reader/tablet/iPad/smartphone	3
Other tech sources of preference, access to other e-formats	2
Prefer to purchase e-books/audiobooks	1
Not compatible/supported on my tech source, issues downloading (e.g., files too large for their reader, would not download/stopped, cumbersome)	1
No time	1
Don't like reading off of screen	<1
Other	2
Don't know/not sure	2

Q16. Have you downloaded an e-book, or e-audiobook from Toronto Public Library?

Base: Have searched the library's e-book and e-audiobook collections (2015 n=259, 2019 n=263), Among library users (2019 n=827)

Q17. Why have you not downloaded an e-book, or e-audiobook from Toronto Public Library?

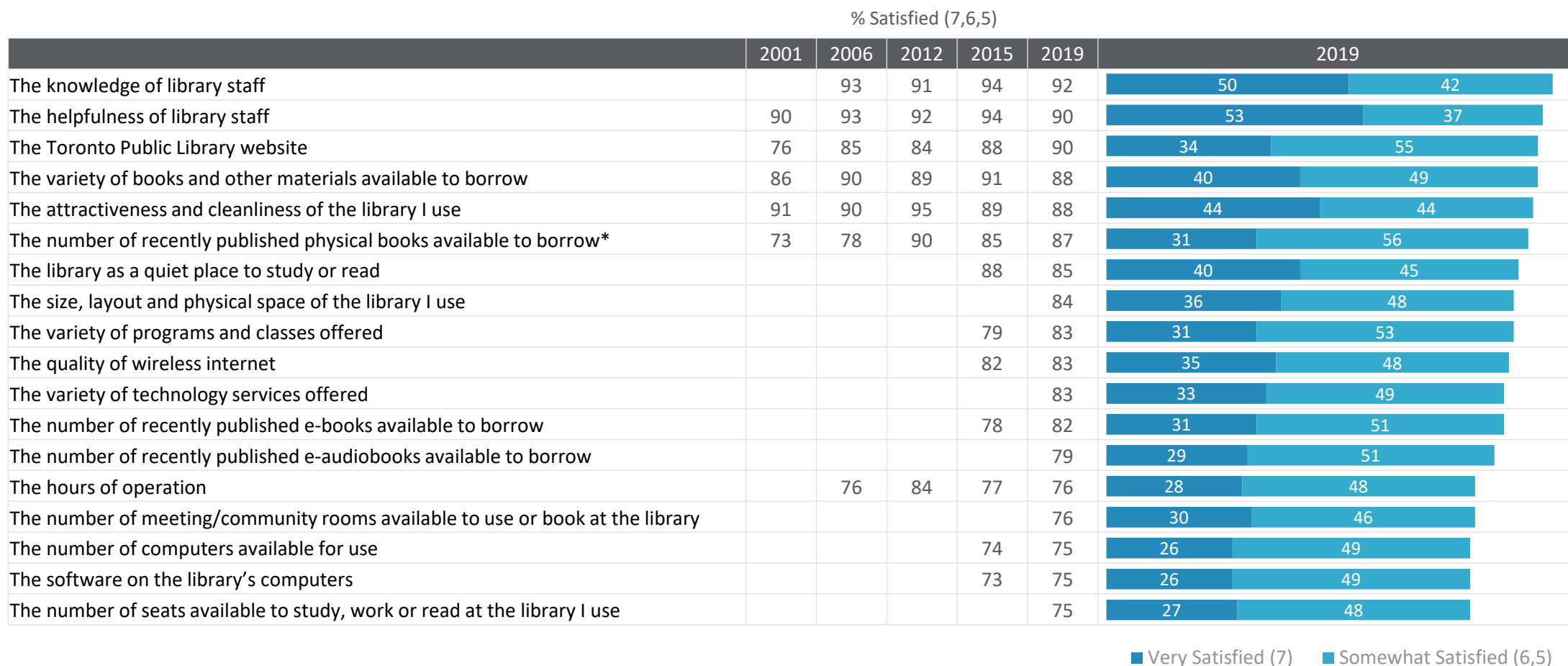
Base: Library users who have not downloaded an e-book or e-audiobook (2019 n=508)

6

Satisfaction with Toronto Public Library

SATISFACTION WITH SPECIFIC ASPECTS OF TPL AND ITS SERVICES – USERS

Satisfaction with specific aspects of TPL and its services remain stable among users in 2019



Q18. Now, we'd like to ask you how satisfied you are with each of the following aspects of the Toronto Public Library and its services.

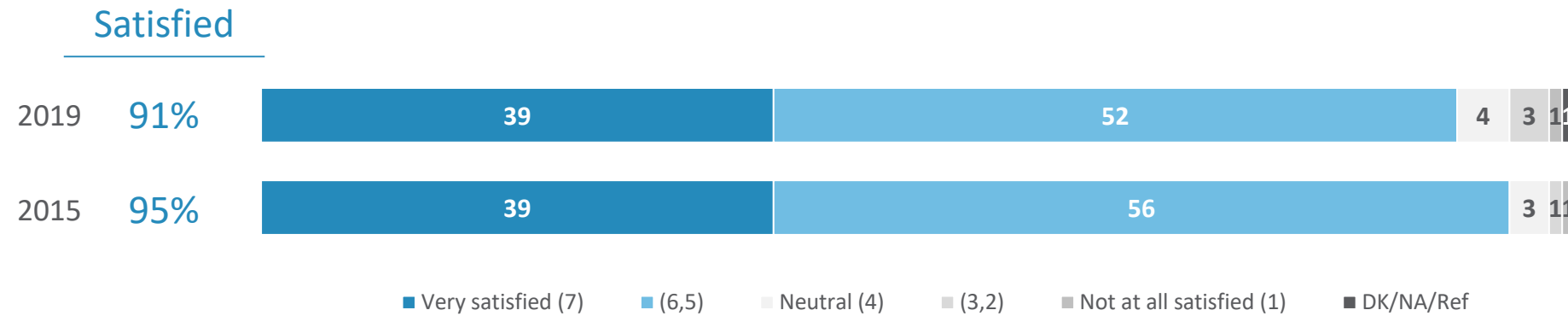
Base: Have visited a library in past year (2015 n=838; 2019 n=827)

Proportions have been recalculated to exclude don't know responses

OVERALL SATISFACTION WITH TPL

Among Library visitors, overall satisfaction with TPL remains high in 2019

- Top-Box Satisfaction ratings (7 on a 7 point scale) remain stable wave-over-wave



Q19. And overall, how satisfied are you with the Toronto Public Library?

Base: Have visited a library in past year (2015 n=838, 2019 n=827)

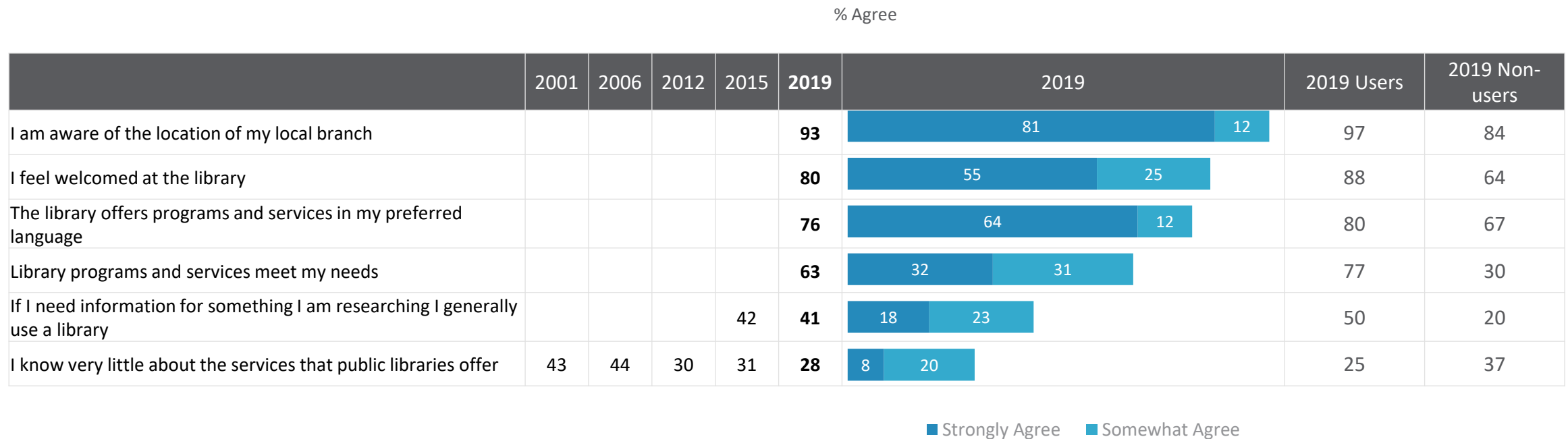
7

Assessments of Toronto Public Library

Agreement with statements around TPL awareness and access tends to be strong

- Most non-users in 2019 feel they know about the services that Public Libraries offer and it may be a case of reminding them of the wide range of services the TPL provides and some of the newer ones introduced since they may have last visited.

STATEMENTS RELATED TO AWARENESS/ACCESS

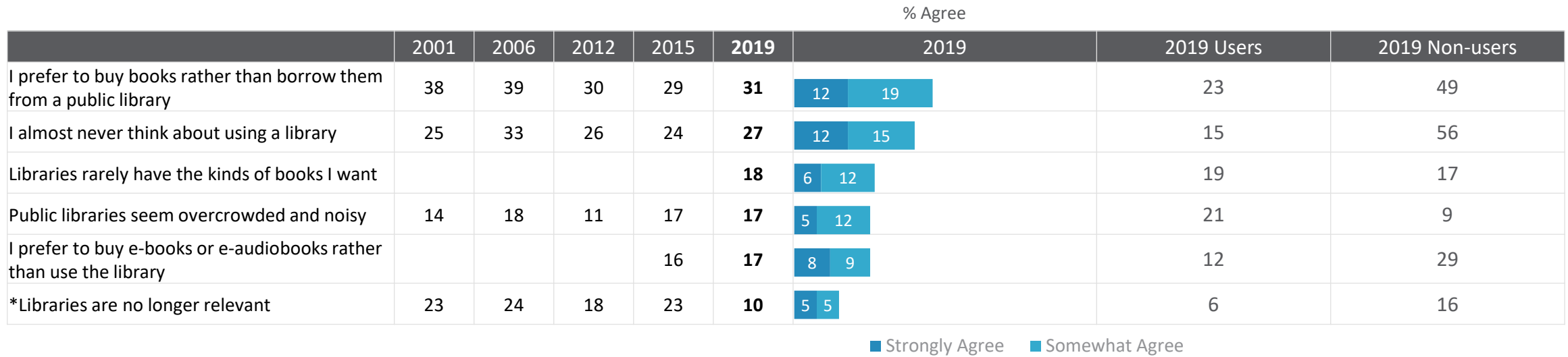


Q21. Please indicate if you agree or disagree with each of the following statements.
 Base: Total sample (2001 n=1251; 2006 n=1255; 2012 n=1220; 2015 n=1204; 2019 n=1260)

Agreement with statements around the relevance of and barriers to using Public Libraries is much softer

- Where comparable, findings are relatively consistent with 2015
- Even among non-users, agreement with negative statements is relatively soft

STATEMENTS RELATED TO RELEVANCE/BARRIERS



Q21. Please indicate if you agree or disagree with each of the following statements.
 Base: Total sample (2001 n=1251; 2006 n=1255; 2012 n=1220; 2015 n=1204; 2019 n=1260)
 * Prior to 2019 statement read “the internet has made libraries irrelevant”

Agreement with statements around the community/service role of Public Libraries remains strong in 2019 and consistent with 2015 (where comparable)

- Even among non-users, agreement with statements around the importance of libraries to the community is high

STATEMENTS RELATED TO COMMUNITY/SERVICE ROLE

	2001	2006	2012	2015	2019	% Agree		2019 Users	2019 Non-users
						2019	2019		
Libraries support literacy		93	91	92	91	74	17	94	86
Public libraries are an important resource for the community	98	97	92	92	90	74	16	95	80
Libraries provide important support for students				88	87	62	25	89	81
Libraries are a place for lifelong learning				89	86	64	22	91	77
Libraries support low income residents and communities				80	83	62	21	86	75
Libraries are vital community spaces which bring people together				83	82	57	25	87	71
Any service reductions to libraries will have a negative impact on my community				73	80	58	22	88	62
Libraries support newcomers to Canada				72	73	49	24	76	67
Libraries are a place to use and learn new technology					63	32	31	67	56


















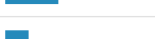



■ Strongly Agree ■ Somewhat Agree

Q21. Please indicate if you agree or disagree with each of the following statements.
 Base: Total sample (2001 n=1251; 2006 n=1255; 2012 n=1220; 2015 n=1204; 2019 n=1260)

IMPORTANCE OF WAYS IN WHICH PUBLIC LIBRARIES CAN SERVE LOCAL COMMUNITIES

Providing the community with a variety of reading resources, providing literacy support for all ages and being a centre of lifelong learning are viewed as being the most important ways in which Public Libraries can serve local communities

- Findings are relatively consistent when looked at by frequency of Library usage

	2019 – TOTAL SAMPLE	2019 – USERS	2019 – NON-USERS
Providing the community with a variety of reading resources in different formats*	 46	 50	 38
Providing literacy support for people of all ages	 37	 35	 41
A center for lifelong and self-directed learning	 35	 39	 26
Providing an open and accessible community space	 30	 31	 27
Providing access to current and new technology**	 22	 19	 26
Helping library users conduct research	 12	 11	 16
Providing access to cultural experiences	 7	 7	 7
	<i>Don't know = 4%</i>	<i>Don't know = 2%</i>	<i>Don't know = 8%</i>

Q22. Below is a list of ways in which a public library can help serve its local community. If you had to choose only two, which of the following do you feel are the most important aspects of a public library?

Base: Total sample (2019 n=1260; 2019 Users n=858; 2019 Non-users n=399)

WAYS IN WHICH PUBLIC LIBRARY CONTRIBUTES TO COMMUNITY

Overall, providing a safe place for people to spend time, creating educational opportunities and promoting a sense of community are identified as the main ways in which the Public Library can contribute to the community

- Results don't really vary dramatically between users and non-users on this but non-users are much more likely to not know how Public Libraries can contribute to the community

	2019 - TOTAL	2019 - USERS	2019 - NON-USERS
Providing a safe place for people to spend time	71	76	62
Creating educational opportunities for people of all ages	69	75	58
Promoting a sense of community among different groups within your local area	54	61	40
Helping spark creativity among young people	50	54	41
Providing a trusted place for people to learn about new technologies	51	53	47
Serving as a gathering place for addressing challenges in your local community	41	46	31
Learning about issues & ideas from different point of views	40	43	33
Helping people decide what information they can trust	39	42	30
Helping people when an emergency or major problem strikes the community	22	25	15
Other	3	3	3
None of the above	1	<1	2
Don't know/not sure	11	7	21

Q31. In which of the following ways does your public library contribute to your community? (Select all that apply)

Base: Users/Non-users (2019 Total n=1260, Users n=858, Non-users n=399)

8

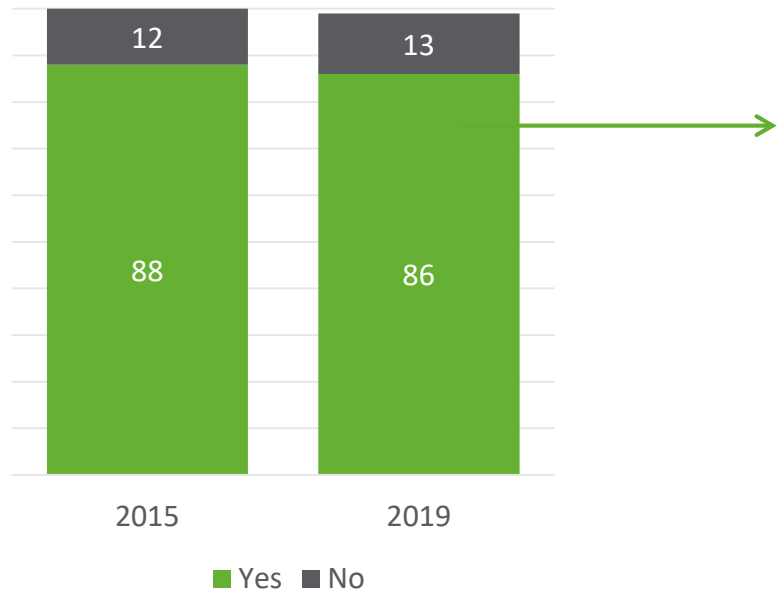
Non-Library Users

USE OF PUBLIC LIBRARIES AS A CHILD – NON-USERS

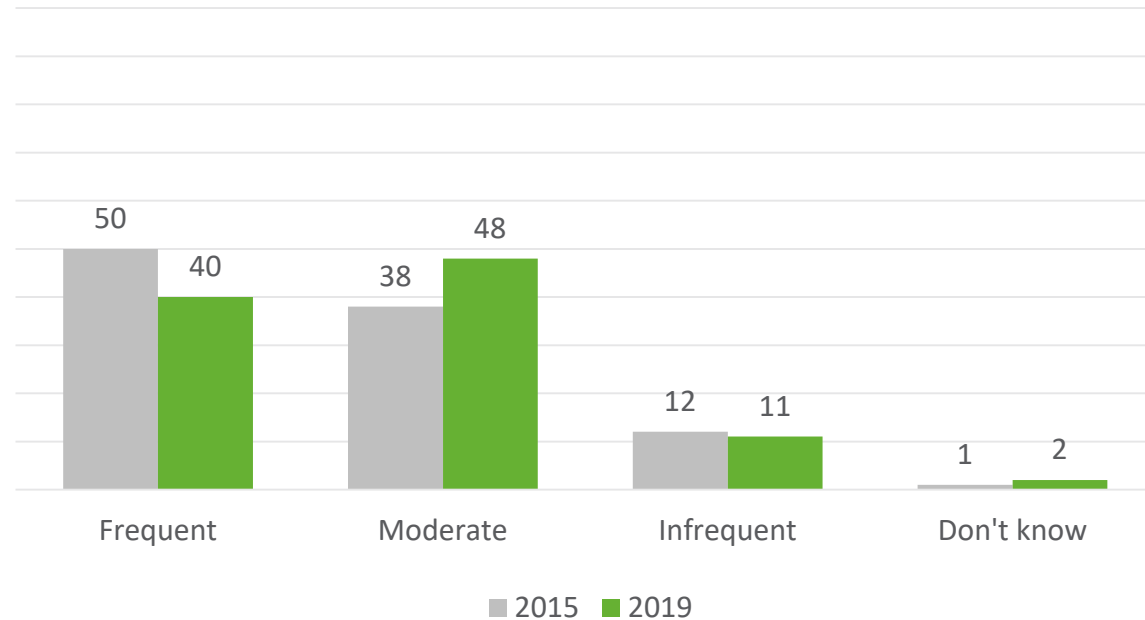
The majority of non-users report having used Public Libraries as children

- The majority of these were either moderate or frequent users and possibly when they were children.

Have ever used a library on a regular basis, even as a child?



Frequency of using a library previously (even as a child)



Q24. You indicated you haven't used a library in the past year, however do you recall ever using any library on a regular basis over the years, even as a child?

Base: Non-users (2015 n=355; 2019 n=433)

Q25. When you did use the library regularly, would you describe your usage as frequent, moderate or infrequent?

Base: Non-users who used to use the library regularly (2015 n=313; 2019 n=371)

REASONS BESIDES TIME FOR NOT USING PUBLIC LIBRARIES – NON-USERS

The ability to access information/entertainment online from home (NET 43%) is the main reason for not being a Library user today

	2019 Non-Users %
NET ability to access information/entertainment at home (online or mobile)	43
Internet has everything they need, have access to internet/computer/smartphone at home or at their fingertips	25
Home access to everything they need/want (have computer/internet, buy/borrow books, access to iTunes/movies/entertainment...)	15
Libraries are irrelevant with onset of the internet, outdated with technology sources, would need to revamp/offer alternative services to be relevant	3
Less need/no need for library at this point in their lives, not needed for their current lifestyle	10
No time/too busy	5
Location accessibility issues (distance, lack of transportation available to them/do not drive, lack of parking)	5
Mobility issues, disabilities limit them, vision impairment	5
Prefer to buy books, access books in their personal library they have not read yet, prefer to borrow/swap books with friends, have other resources to books (includes prefer to read at their own pace)	4
Have access to other libraries (through work/school: university/college/other reference libraries, other community resources for books...)	4
Prefer to purchase e-books	3
Library space/environment issues (germs/bed bugs, noisy, unwelcoming staff, lack of work space/areas)	2
Not interested, have other interests/activities they prefer	2
Lack of content at library that they are interested in/need/want	1
Lack of current/up to date content available, wait times for recent releases	1
Hours of operation conflicts with their preferred time	1
Don't know/ not sure	14

Q26. And aside from time, which is always an issue for people, what would you say is the main reason you don't use a public library more often?

Base: Non-users and users who have not visited a Public Library in the past year (2019 n=418)

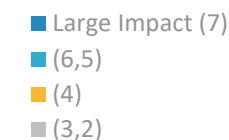
IMPACT OF VARIOUS THINGS ON LIKELIHOOD OF USING TPL IN THE FUTURE – NON-USERS

The availability of really good programs/events, access to up-to-date technology and providing access to the most recently published books would help to drive Library usage among current non-users

- Reducing or making late fees more lenient has the least impact overall

Among non-users

	% Impact (7,6,5)			2019					
	2012	2015	2019						
If the library had really good programs or special events I'm interested in	47		57	26	31	12	7	19	5
If the library has access to up to date technology			50	21	29	7	8	28	7
If libraries had the most recently published books*	39*	55	49	24	25	8	10	27	6
If I did not have to wait for the book to become available*	*	47	41	16	25	12	8	31	8
If the library had more eBooks, e-audiobooks, or other online content available to download/stream		42	37	18	19	11	11	34	7
If libraries were more attractive and comfortable places		45	37	15	22	13	13	31	6
If the library had reduced or had more lenient fines for overdue materials		34	22	9	13	10	10	50	8



Q28. Please indicate how much of a factor each of the following would be in encouraging you to use a public library more often.

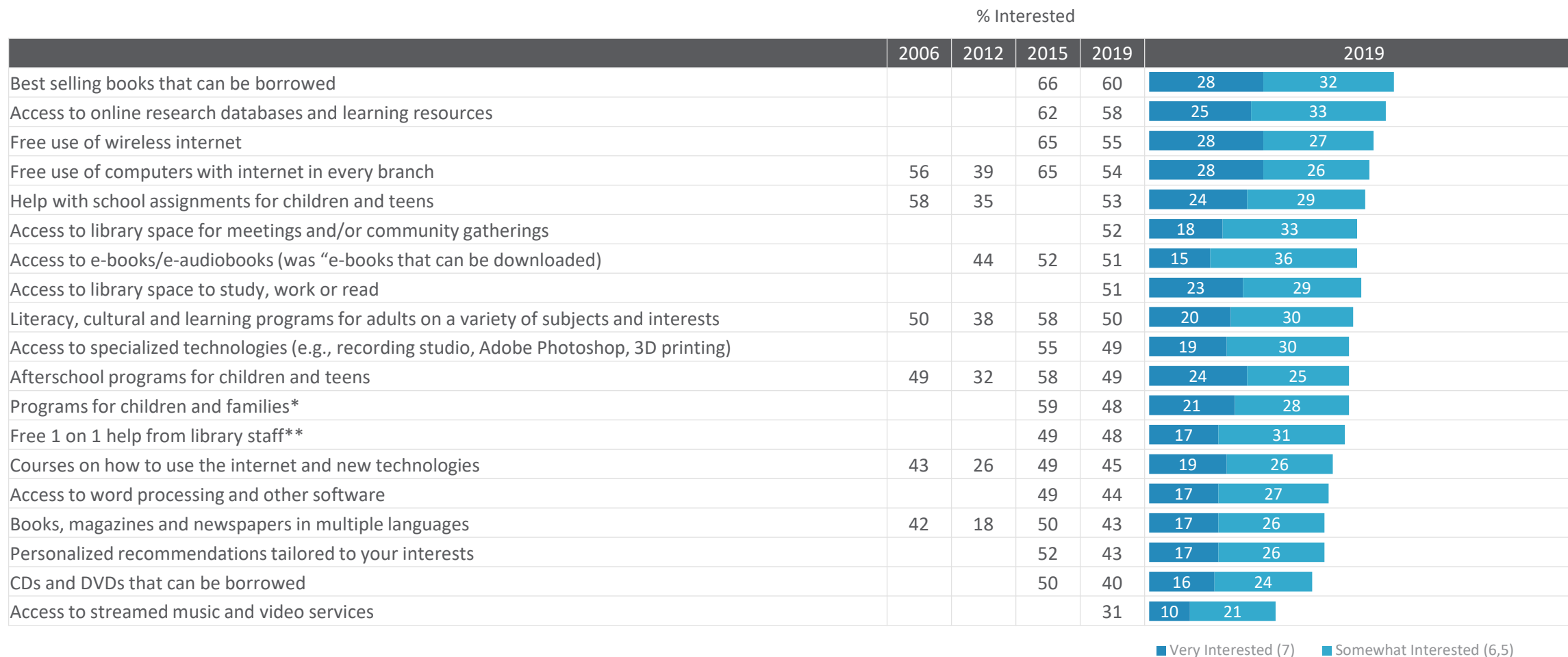
Base: Have visited a library in past year (2012 n= 325; 2015 n=366; 2019 n=399)

* 2012 wording: "If libraries had the most recently published book and I did not have to wait for the book to become available"

INTEREST IN SERVICES OFFERED BY TPL – NON-USERS

Interest in various services offered by TPL is relatively high among Non-Users, with Top-3-Box ratings of ~50% or higher on 13 of the 19 of the services tested

- Reported interest is, however, consistently lower than in 2015



Q23. The Toronto Public Library system provides a wide range of services. Please indicate how interested you are in making use of each of these services personally or with your family.

Base: Non-Users (2006 n=334; 2012 n=347; 2015 n=366, 2019 n=399)

* Was “Programs for adults on a variety of subjects and interests”

** Was “Free 1-on-1 help with research and technology support”