



Public library trends 2018

by Ian Reid; edited by Carl Thompson on December 4, 2017Ian Reid is VP, Customer Service, and Carl Thompson is President, Counting Opinions (SQUIRE) Ltd., Toronto. Contact Ian at ireid@countingopinions.com. Contact Carl at cthompson@countingopinions.com. Ian is currently reading The Dark Tower by Stephen King. Carl is currently reading Seniority by Shawn O'Shea. The Annual Public Library Data Service (PLDS) survey is conducted by Counting Opinions (SQUIRE) Ltd. (CO) on behalf of the Public Libraries Association (PLA). A 2017 US and Canadian public library survey survey survey and canadian public library survey survey survey and canadian public library survey survey and canadian public library survey survey and canadian public library survey survey survey survey survey survey survey survey survey and canadian public library survey survey survey and canadian public library survey su finance, resources, service and technology usage for fiscal year 2016 (FY2016). Each year PLDS includes a special section. This year, additional questions focused on service PLAmetrics offers subscribers access to longitudinal PLDS datasets from fiscal year 2002. It also includes annual data from the Public Library Survey (PLS) (2000) provided by the Institute of Museums and Library Services (IMLS). PLAmetrics provides real-time access to meaningful and relevant public library data for peer-to-peer benchmarking and trend analysis through a custom reporting service. This report provides an analysis of selected PLDS funds for 2016 and trends by CO using the PLAmetrics reporting service. Participants have the opportunity to answer any and/or all questions that make up the survey. As in previous years, public libraries in the United States and Canada are invited to participate in the survey. CO sent 5,564 emails to start the survey (January 2017). In addition, public libraries and state agencies were sent for examination via email, social media and posts on websites. Postcards promoting participation were distributed at the Midwinter American Library Association (ALA) Meeting (2017). In total, more than 5,591 unique libraries have been contacted. Follow-up letters and emails were sent throughout February and March. The original application deadline (31 March 2017) was extended to 30 April 2017. State data coordinators from the U.S. Data Coordinators and The Province/Association in Canada have contacted about promoting the survey in their libraries. Their involvement led to increased participation, including 3,055 (2,704 in 2016) of U.S. and Canadian public libraries partially or fully responding to demand data, a response rate of 54 percent (an increase of 12.9 percent compared to 2016). Copies of the survey, including definitions available online via the PLDS Survey website and in www.plametrics.org, Summary The following summary of key findings is based primarily on an analysis of the results from a cohort of libraries constantly reporting: Over the past five years, library programs per capita have grown at a rate (6.3 percent) twice as much as the decline in circulation per capita %guot%%guot% guot%%guot% since 2012, employee spending (accounting for more than 67 percent of operating expenses) has increased by 7.05 percent, while the number of employees/residents has decreased by -1.5 percent. Electronic circulation is constantly growing at an 11.7 percent rate, but not enough to shut down to reduce circulation of physical materials. The relationship of spouses' sharing for electronic materials significantly increased the shares in libraries with the area of legal services &It; 100 000. The declines in circulation may be partly due to changes in measurements over time (differences in circulation policies, especially with regard to electronic materials) and due to an overall decline in library usage that reflects de-cline unemployment rates (which have steadily declined since 2011), a reduction in the use of CD/DVD materials and a slowdown in electronic use. While CD/DVD spending (\$2.26/capita) decreased by \$0.02 in fiscal 2016, there was a decrease in the share (-4.08 percent) of total circulation. Operational finances Figure 1 shows that since fiscal year 2012, library revenue per capita has increased by \$3.87, on average by 2.9% per year, whereas that the U.S. and Canadian economies grew at an average annual rate of 2.06% and 1.86% respectively over the same period. In the year between fiscal 2015 and 2016, the library group serving populations from 100,000 to 499,999 received the largest increase of 2.3 percent (N = 221) for people serving populations below 100,000 and 2.2 percent (N = 63) for people serving populations above 500,000. Large spending on libraries increased by 2.9 percent, or 0.7 percent more than their revenue change. Spending on small and medium-sized libraries increased by 1.3 percent and 3.7 percent, respectively. Figure 2 shows five-year trends in continuously responsive libraries for employees (N=428), materials (N=428) and other expenses (N=426) per capita since fiscal year 2012. Since 2012, spending on materials has increased by \$2.22 per capita (1.99% per annum), other expenses by \$0.39 per capita (1.89% per annum) and \$1.36/capita (3.81% per annum). As mentioned later in this article, the number of employees per capita has fallen -3.4 percent since 2012, suggesting a combination of hours worked, staff composition and costs, rather than the overall number of employees, are driving the increase in spending on employees. Based on those libraries that have responded continuously over the past decade (N=161), material spending levels for fiscal year 2016 (\$5.93 per capita), which peaked in fiscal year 2008 (Figure 3). This spending model also appears to be in line with US GDP growth (the most are American). Service level Figure 4 shows a significant increase (5.4 per cent) in per capita farms in from 2.83 to 2.86 points per capita (0.9%) in 2016. It should be noted that the increase in the average number of farms per capita in the financial year 2015 was primarily the result of reporting of several libraries, for the first time for the electronic material resources available under consortium contracts (see also Table 2 and related discussions). Figure 4 also shows that since 2012, almost all output service level indicators (per capita) have continued to decline, with the exception of programs (11.7) percent) and library usage (0.28 library usage/per capita), which has rebounded significantly since 2014, but still well below FY2015-16) the following decreased (least to the largest: circulation (-3.0 percent), visits (-3.6 percent) and reference transactions (-9.8 percent). Since 2012, only per capita programs (27 percent) from 11.97 to 15.26 programs per capita. This growing emphasis on programming is one of the clues to how library services are taking over. A Pew Research survey that showed from the Library's 2016 study that 80 percent of respondents (U.S. adults 16 years and older) say libraries should offer programs to teach digital skills. 2 As programming becomes more important and requires more library resources (money, staff, space, equipment, etc.), libraries will need to better prepare to demonstrate their performance and effectiveness in providing services. The efforts of the PLA and Project Outcome support the effectiveness measures of the programme, which are increasingly important. Libraries will also need to find better measures for the cost and effectiveness of the programme to complete new measures of programming effectiveness as evidence for stakeholders to support libraries as they maintain and develop these services. It is equally important to better inform library administrators when allocating resources. Currently, most datasets (including PLDS) do not have data on budgets and expenditure for programme development. They may be combined with other expenses and/or buried in staff costs. Although it is reasonable to assume that more programmes are being offered, costs at micro level (e.g. per programme, per participant, etc.). At present, therefore, it is difficult to assess the budgetary impact resulting from the increase in the provision of services under the library programme and the comparative allocation of resources. The unemployment rate in the United States more than doubled (Figure 5) during the recent recession. 3 At the same time, the number of visits to libraries and circulation increased and then steadily declined as unemployment fell to before the recession. This is probably not the only factor influencing the decline of traditional library usage measures, but it does indicate why library libraries new and better measures of their effectiveness and effectiveness should be considered. Expenditure on materials and Table 1 shows the average expenditure of materials by population group since the financial year 2012. Small and medium-sized libraries serving populations below 500,000 typically show an increase in average spending year on year. Medium and large libraries show higher variable material expenditures. Larger libraries serving populations of 500,000 or more spent more on materials in fiscal year 2016 than in the previous 4 years, an increase of 6.2 percent compared to 2015. Ten large libraries saw a more than 25% increase in material spending compared to 2015; resulting from increased fees for mills and other financing increases. Figure 6 shows the changes in average spending on materials per capita by type. Average spending on electronic materials increased by \$0.56 (55.9%). While average print spending fell \$0.12 (-4.5 percent) and average CD/DVD spending fell \$0.03 (-3.2 percent). These per capita spending fell \$0.03 (-3.2 percent). Figure 7 shows per capita circulation by material type as a percentage of the total circulation for those that report circulation). The circulation of printed materials and CDs/DVDs per capita continues to decline relative to total circulation, while other distributed materials (including electronic materials) continue to grow. As a percentage of the total circulation per capita, both the print and CD/DVD circuits still make up a smaller portion of the total circulation. Since the 2012 financial year, the increase in electronic circulation per capita (7.0 percent), as shown in Figure 8, represents a corresponding decrease in CD/DVD circulation per capita (-6.0 percent) and the remaining percentage as a result of a decrease in printed material/capita circulation (-4.2 percent). Libraries adjust their material spending accordingly. As Figure 9 shows, the overall per capita circulation continues to decline at a rate of -3.0 percent per year, while overall spending on materials has increased at a rate of 1.9 percent per year. Expenditure on CDs/DVDs, as shown in Figure 6, has been relatively unchanged over the last five years, but the average circulation of these items has decreased to -6,5 % per year, as shown in Figure 10; probably as a result of an increase in the use of music and video download services. Similarly, the circulation of printed materials decreased by -2.9 percent per year, as shown in Figure 10. Since 2012, expenditure on printed materials has fallen at a

rate of -1.1 percent (see Figure 6). Electronic trade in materials, on the other hand, continues to grow at a rate of 30.0 per cent (Figure 6). Between 2015-16 electronic circulation increased at a rate of 15.0 percent, indicating that the service matures and grows at a slower rate each year. The costs of this rapid growth in electronic circulation are not always fully borne by every libraries have been involved in the provision of these materials. As a result, spending on these materials did not have to grow at a similar rate. Table 2 shows the five-year trend towards total circulation and electronic circulation per capita for all permanently responsive libraries, grouped by population of the legal services area. Large libraries serving populations of 500,000+ show the highest decrease in total circulation per capita (-3.2 percent per year), while electronic per capita circulation shows the strongest growth rate (33.6 percent per year). There are challenges in comparing electronic circuits with other types of material circulation, given the differences in lending policies in different types of materials. While circulation means that a product has been loaned to a library user, a policy that combines shorter and longer loan periods and/or auto-renewal will affect benchmarking and trading rates and other measures of material availability (in the case of loans). This means that counting the circulation between equivalent institutions and between material types within the same institution and over time becomes increasingly difficult to compare. Some rules may not be at the discretion of the library, in particular in the case of electronic material downloaded from third parties and/or within a consortium. Factors such as number of copies, simultaneous use and/or total day of use also factors in consistent circulation measurement. As a result, the upcoming PLDS 2018 study raises new questions about circulation policy and counts for different types of materials, hoping to develop better measures to understand these trends. Table 3 shows the five-year per capita trend for all continuously responsive libraries grouped by legal services area. Small libraries serving populations of less than 100,000 (N=222) show the highest farm growth per capita (8.7 percent per year), which is affected by membership agreements providing access to large repositories of electronic materials, first reported in fiscal year 2015. The addition of these titles significantly increased the average number of farms per capita. Similarly, libraries serving populations of 100,000 to 499,999 also increased their per capita shares in fiscal years 2015 (5.2 percent) and fiscal year 2016 (6.8 percent). This new reality probably means the variability of trends in holdings, taking into account the direct impact of the significant changes made by such concoct arrangements. Large libraries reduced their holdings by an average of -1.6 percent, despite 2015-2016 compared to the previous three years (see Table 1). Recovery rates also reflect trends in farm composition and circulation. These large increases in shares have led to a reduction in collection turnover rates. Figure 11 shows that libraries serving populations of less than 500,000 have the highest decline in turnover since 2014. Larger libraries serving populations of more than 500,000 show a decline in farms over the past five years, with corresponding declines in circulation and turnover. Reducing confluence and reception turnover creates the belief that the demand for libraries and/or their value is somehow decreasing. Instead, these measures continue to emphasise that the combination of library services is changing and that the number of farms and turnover is becoming increasingly difficult to measure consistently. Programs and attendance Contrary to the downward trend in circulation/per capita (-11.4 percent since 2012), there has been a significant increase in per capita programs (27.5 percent since 2012) and per capita program attendance (16.9 percent since 2012) (Figure 12). Interestingly, circulation/per capita is declining annually at a rate of -3.0 percent since 2012, per capita programs have increased by more than twice that rate (6.3 percent), and per capita turnout rate of 4.0 percent. While libraries continue to invest in farms (despite declining use), it is clear that they allocate more resources to programming, although there are no specific resources available to confirm this other than the obvious. Programming competes for resources, including space, personnel, equipment, materials, management time, time spent on community engagement, and more. As this trend continues, library management will increasingly require better ongoing measures (efficiency and effectiveness data) as they adapt and optimise the combination of traditional and new services, including programming. Figure 13 contrasts the growth rate of programming with a much slower increase in working hours and a decrease in the number of employees per capita. If programming growth continues, it may be limited by potential bandwidth issues such as opening hours, staff resources, and space, although they may not be a direct problem depending on where/when and how programs are delivered (library, online, asynchronously, in the community). Nevertheless, increasing the number of open hours to include more programmes (perhaps at a more convenient time) means a potential increase in commitment to additional resources, including staff. Libraries will therefore have to justify these commitments. Workers in the last five years, as shown in Figure 14, have changed little, the number of employees among the constantly responsive libraries (N=429). The average number of employees is relatively static static over the past five years has fallen at a rate of -0.71 percent, mainly due to population growth over the same period (1.0 percent). Since fiscal year 2012, per capita staff expenditure has increased at a rate of 1.99 percent with the largest increase (2.3 percent) in fiscal year 2016. Staff spending is growing faster than the number of employees. This increase reflects changes in staff composition and/or costs per person and/or hours per staff member. Figure 15 compares fiscal year 2012 with fiscal year 2016 results for the average percentage of MLS, non-MLS, and other employees for continuously responsive libraries. Over the past five years, the average percentage of MLS librarians has increased at a rate of 0.71 percent. The average percentage of non-MLS librarians increased faster (3.50 percent), determined by declines in other employees (-1.30 percent), which are likely lower per capita (due to population growth over the same period). The number of web visits to technology (see Figure 16) continues to decline (-5.8 percent in fiscal year 2016). This can be attributed to several factors that complicate the process of tracking virtual visits. This includes factors such as: nearly 70 percent of responsive libraries report having library apps for mobile devices, and more than 95 percent use social networks (see Figure 17). Because native apps are different from a website, it's likely that those users are using the app rather than visiting the library site for the service/content they need. Similarly, social networking sites are accessible without first visiting or possibly ever visiting a library site, so these web visits may not be counted or worse, they can be counted double or triple when they navigate various online services (e.g. iLS, Facebook, YouTube, Pinterest, Linked-In, Twitter, online databases, third-party e-media services, etc.). The percentage of libraries that indicate that they have community links (83.2 percent) and library staff content (80.7 percent) decreased again in fiscal year 2016, but 5.0 percent of the continuously corresponding libraries still provide such content (see Figure 17). Fewer libraries reported that they supported reviews of patrons' books (37.5 percent) and online book clubs/discussion forums (26.3 percent). More libraries confirmed that they offer social networks (96.4 percent), virtual reference services (81.8 percent), non-English content (47.6 percent), and user-based content (32.4 percent). Better integration of library content (website, ILS, ...) with major search engines, providing/promoting a combination of curated content on the website and other efforts should help increase traffic and possibly slow down and/ reverse the downward trend in website visits. The percentage of libraries that circulate laptops (33.0 percent), tablets (27.2 percent) and electronic readers (27.0 percent) decreased in fiscal year 2016 (see Figure 18). It seems that with the increase in ownership of internet devices (smartphones, laptops and tablets) reported by Pew Research in mid-2015 (see Appendix).4 More libraries confirmed that they circulate in other devices (42.4 percent), an increase of 6.8 percent compared to 2015. Among continuously reporting libraries (N=428), Table 4 shows that changes in supported populations should be taken into account in each performance analysis. Therefore, our data analysis includes such comparisons using per capita results. Plds study summary fy2016 Table 5 (see page 30) summarises usage data captured during the PLDS 2017 study (2016 data). Overall, more libraries reported all the measures listed in Table 5, but fewer libraries reported each component of the circuit: printing, CD/DVD, and more. In addition, fewer libraries reported annual renewals in fiscal year 2016. Although fewer libraries reported these components of circulation, more libraries reported electronic circulation compared to 2015. Reference

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