AN ANALYSIS OF PUBLIC LIBRARY TRENDS

Prepared for the CANADIAN URBAN LIBRARIES COUNCIL www.culc.ca



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Executive Summary

The library environment has undergone substantial change over the course of the past decade, and libraries are meeting new challenges. To help assist libraries and library stakeholders in understanding their operating environment, Lumos Research conducted an analysis of data compiled over the period from 2000 to 2009 by members of the Canadian Urban Libraries Council and some long-term subscribing data contributors. The following are some highlights of our findings:

- The per capita number of library usage transactions was up sharply in the past decade, rising 45% from 16.6 to 24.1 transactions on average.
- Much of this increase in transactions was driven by digital information. For example, use of electronic databases (library Internet subscriptions or stand-alone or networked CD-ROM databases) more than doubled, and Internet visits to library websites and catalogues grew five-fold in the period. Nevertheless, the number of items circulated per capita had also increased a substantial 16% over the past decade, while per capita inperson visits have remained stable.
- Compared with the rapid rise of website visits, electronic database transactions are still in their nascence, at just 0.71 uses per capita in 2009, or fewer than 3% of all transactions.
 Libraries should be prepared to expect strong growth in database transactions, which will contribute added momentum to library use.
- Libraries are providing better value than ever to their stakeholders. Although library expenses have increased overall, the expansion in number of user transactions means that cost per use has declined by nearly 27% from 2000-2001 to 2008-2009.
- Although spending on library materials has increased in the decade, pressure from higher overhead costs means that materials make up a smaller percentage of libraries' expenses than in 2000, decreasing from 13% to 11% of total library expenses.
- Among materials expenditures, a smaller percentage is being spent on books and periodicals, while strong increases have been seen over the past decade in spending on electronic and audiovisual materials. The percentage of materials expense devoted to these latter items had increased from 18% in 2000-01 to 31% in 2008-09.
- Spending on materials has a strong role in increasing library use. Libraries whose per
 capita spending on materials is in the top third register nearly twice the number of
 usage transactions as do libraries whose materials spending is in the bottom third.
 The impact of materials on usage is so great that libraries which are among the top per capita
 spenders on materials realize the lowest costs per usage transaction.
- The increased revenue needs of libraries for the most part have been filled by the municipal level of government. Provincial funding has not kept pace with libraries' needs over the past 10 years, and Federal funding makes up only a fraction of a percent of all revenue.