



Hamilton Public Library's 2017 Community Survey Initial Findings



Figure 1 - Word cloud from Q11's open ended response
(Samples from comments of : "H" University Graduates "P" Millennials "L" College Graduates)

EXECUTIVE SUMMARY

With over 6,796 responses the community told us they were 95% satisfied with our service and 93% with our helpfulness. Our core demographic groups (Seniors (65+), University Graduates and Parents) are well represented in the sample, so were groups who visit the library less regularly: Millennials (18-34), Non-Users/Infrequent Users and Newcomers.

Using insights derived from a segment of non-users and infrequent users who answered that they “Never think about the Library” we can learn what drives their particular usage patterns and how to encourage them into frequent the library more often. The Library’s strategic plan is supported by this segment’s emphasis and support of digital literacy resources, work and study space, hours and early literacy.

The segment of non-users and infrequent users share values with the Millennial, Parents and Newcomers. Using insights from all these groups we can better integrate HPL services into their lives. Building value for these market segments is key for HPL’s continued success.

OVERVIEW

The Hamilton Public Library Community Survey was offered both in-print and online in English, French, Chinese, Spanish and Arabic. The survey was open for 4 weeks to enable the diverse communities of Hamilton to have their say in the direction of the Library's 2018 strategic planning initiatives.

This report will explore the specific trends in the data presented and outline further research opportunities for the Library in their outreach.

To date there are:

- 6,796 responses submitted
- 6,262 entries for the iPads
- 2,852 sign-ups for the eNewsletter
- 606 people would like an HPL card
- 3,681 who would like follow-up surveys

SURVEY METHODOLOGY

The methods for survey dissemination were closely monitored to maintain the quality of the data. Each referral link, branch manual input and email link had a unique ID which enabled us to track responses, reach and demographics. Further analysis will be completed about the makeup of each specific group at a later date. Below is a table indicating the breakdown of the sample by collector.

| Collector | % Sample |
|----------------------------|----------|
| Bibliocommons | 35% |
| Paper Surveys | 23% |
| Carousel HPL.CA | 17% |
| City Council Email | 10% |
| Outreach Promotions | 8% |
| In-Branch Promotion | 4% |
| Social Media | 3% |

SURVEY FORMAT

The survey was responded to largely in an online format, which was available in English, French, Chinese, Spanish and Arabic. Roughly 77% of responses were submitted online, with 23% on a paper version. Online responses typically took 9 minutes with a 96% completion rate. Branching of the survey questions was limited to a single branch, asking if the respondent had visited a Library in the past year. If the answer to this question was "Yes" then the respondent would be asked 6 more questions pertaining to service and branch activities.

All scaled questions were graded on a 7 point Likert scale, for the purposes of this report those were translated into a weighted average and calculated as percentages.



SURVEY QUESTION OVERVIEW

- Q1-6 demographics: age, postal code, children, immigration, language and education
- Q7 perceived leisure time and priorities
- Q8 promotes Library services and asks about their perceived importance to the Library's role
- Q9 is about the values and where the Library fits in the community
- Q10 is about potential service change
- Q11 is an open-ended response
- Q12 about Library card saturation
- Q13 use of which service types in the past year
- Q14 Library website and catalogue use
- Q15 frequency of use
- Q16 which branch of HPL is most frequented
- Q17 why do you use a specific branch
- Q18 what are you doing when you visit the Library
- Q19 how satisfied are you with the Library

SURVEY RESPONSE

Survey age demographics are closely matched to census results in Hamilton for 2016.

A notable difference is that we had significantly more 35-44 year-olds. Members of this group are more likely to be parents and more likely to be coming to the Library because of their children, as a result. Millennials (18-24) are underrepresented. Seniors, when looking at the entire 65+ bracket, are within 0.03% of the census data.

| Age Range | Survey | Census 2016 | Difference |
|------------------|---------------|--------------------|-------------------|
| 18-24 | 8% | 12% | -3.8% |
| 25-34 | 17% | 16% | 0.1% |
| 35-44 | 22% | 15% | 6.8% |
| 45-54 | 18% | 18% | -0.5% |
| 55-64 | 18% | 17% | 0.7% |
| 65-74 | 14% | 12% | 2.2% |
| 75+ | 4% | 10% | -5.6% |

Respondents are 56% more likely to be University graduates than the population in Hamilton, which is composed of 28.4% University graduates as of Census 2016. The survey sample under-represents all other education demographics because 44.3% of our sample are University graduates.

Using a simple forward sortation analysis we were able to locate our respondents geographically using GIS. This allows us to see how our sample skews within the geographic conditions of Hamilton. Using Figure 22 below the sample of respondents is concentrated in the following neighbourhoods and former cities: Kirkendall, Mohawk College, Dundas, Binbrook and Winona.



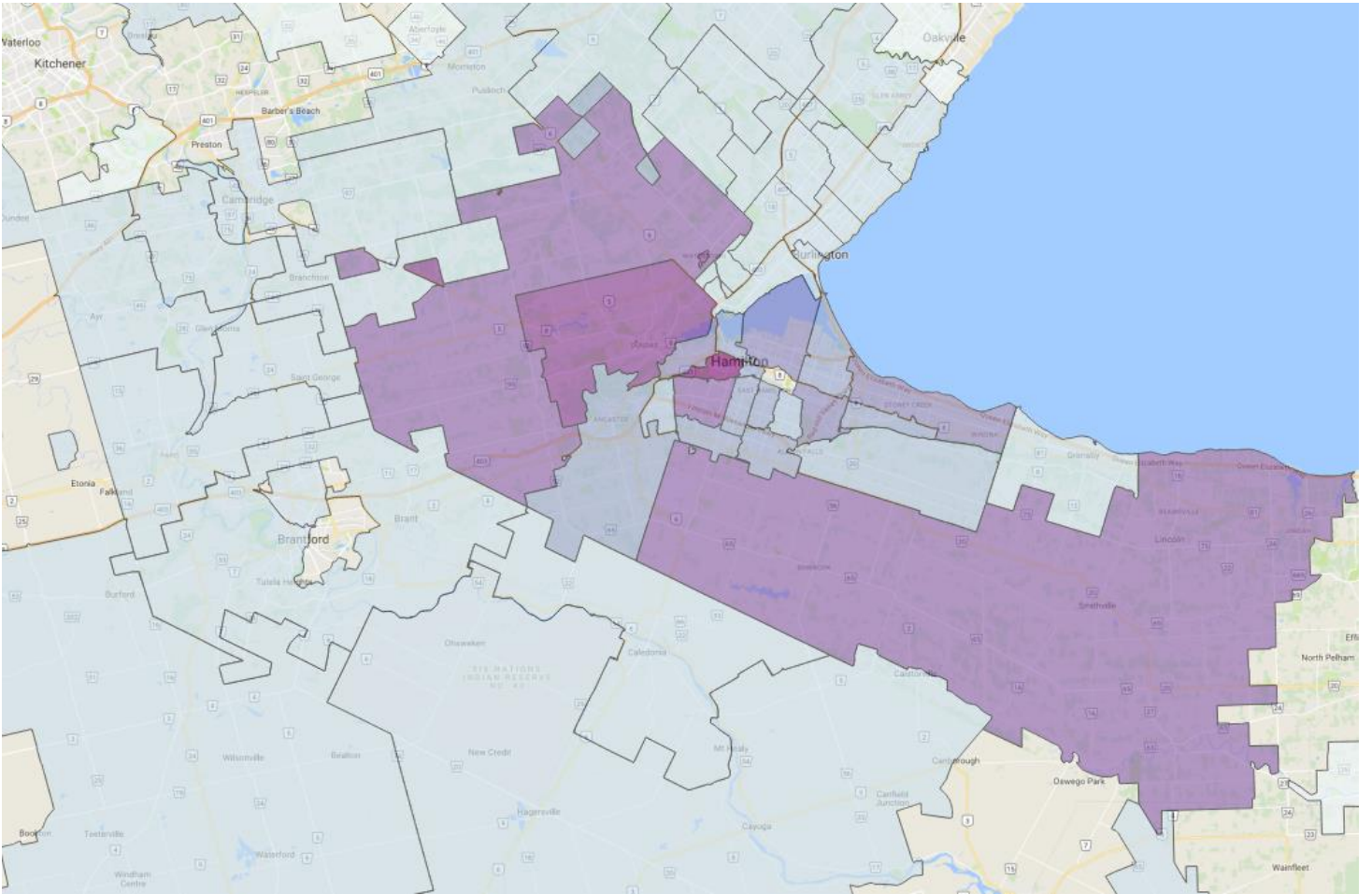


Figure 2 - Map of Hamilton and surrounding region with survey respondent intensity signified by darker colours. Created with the forward sortation information of the postal code as reported by respondents.

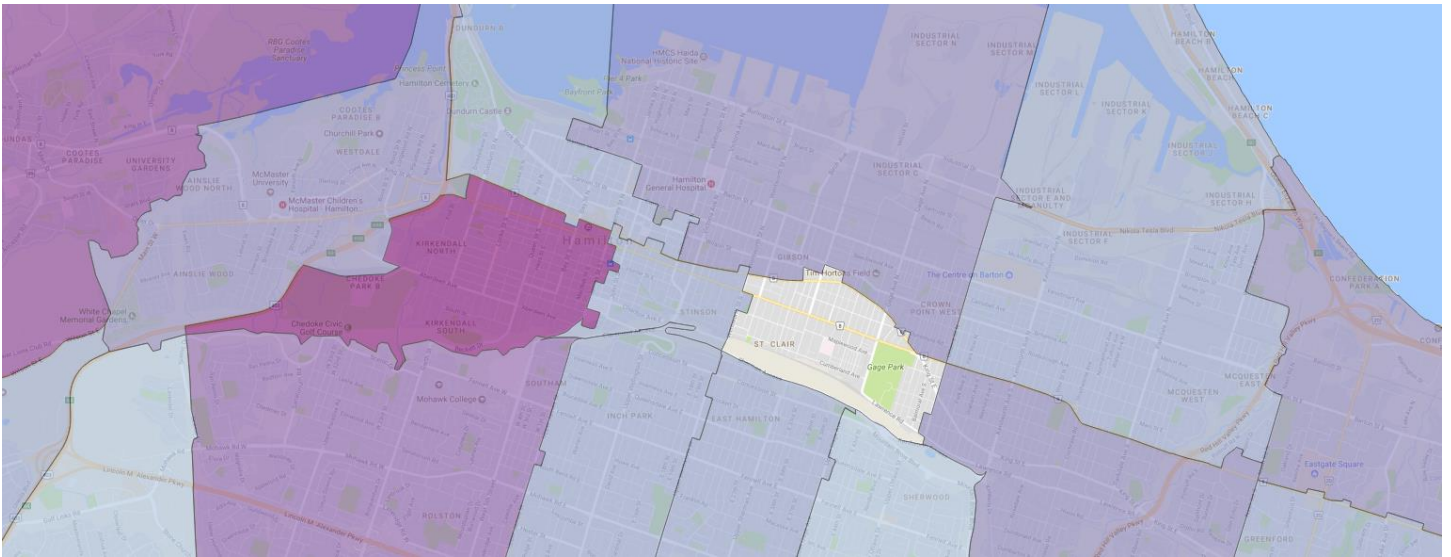


Figure 3 - Focus on downtown Hamilton, forward sortation analysis of survey respondents. Kirkendall had the highest concentration of respondents of any forward sortation while St.Clair/Gage Park had none.

In Figure 3 the concentration of respondents in the Locke/Kirkendall can be explained by a combination of economic opportunity, education levels and a small neighbourhood branch building ideal survey response conditions. Kirkendall's forward sortation had the highest response rate out of any forward sortation for surveys, with 616 responses.

The nearby St.Clair neighbourhood had zero responses. The St.Clair neighbourhood has no local branch and has a slightly increased density of commuters and those who take public transportation in comparison to the Kirkendall forward sortation (take transit to work and those who do not work and live in the same municipality, Census 2016). Targeted geographic outreach to determine the exact causes of this poor response rate should be examined.

SURVEY RESPONDENT SEGMENTATION

FREQUENT USERS

Frequent users are defined as customers visiting more than once a month. They account for 77% of the total sample. Of that 77%, 62% visit more than 20 times per year and the remaining 15% visit 11 - 20 times per year. These frequent users are mostly Seniors, University Graduates and Parents. Frequent Users ranked us very highly on satisfaction, found that our services on the whole satisfied their needs and wants. Their comments focused on general service improvements like more collections, less wait times and improvements to existing services.

SENIORS, UNIVERSITY GRADUATES AND PARENTS ARE MORE LIKELY TO BE USERS OF THE LIBRARY. THEY VALUE LIBRARY SERVICES AND ARE "LIBRARY CHAMPIONS."

SENIORS

Defined as those aged 65 and older. Nearly 18% of entire sample.

- Most satisfied with services
- Value material holds more, more likely to place holds
- Value programs and meeting, social inclusion aspect
- More likely to be a high school graduate
- Less likely to find non-traditional library resources important (makerspaces, WiFi, streaming/downloadable resources etc.)
- Would like more ebook and digital content support

VERY SATISFIED WITH CURRENT SERVICES, WOULD LIKE MORE POPULAR MATERIALS AND EBOOK SUPPORT. STRONG LIBRARY SUPPORTERS.



UNIVERSITY GRADUATES

Defined as those who self-identified as university graduates in Q3. Nearly 45% of entire sample.

- Second most satisfied with services, could use improvement on hours and recently released CDs and DVDs
- Value material holds more, more likely to place holds
- As education increases reported time spent on shopping decreases
- Less likely to be coming to the library to use computers
- Likely to be aged 25-54
- Value online newspapers
- More likely to have a library card, this increases with education
- Less likely to think we need more hours

VERY SATISFIED WITH CURRENT SERVICES, WOULD LIKE TO SEE MORE MATERIAL (DIGITAL AND PHYSICAL), VALUE HOLDS AND ONLINE CATALOGUE. STRONG LIBRARY SUPPORTERS.

PARENTS

This demographic is defined as those who have children in their household. Nearly 40% of entire sample. The survey distinguishes between younger children aged 0-12 years and older children aged 13-17 in Q6.

- Struggle to come frequently to the library
- Likely to be between 35-44 years-old
- Primary driver of visits is taking their children to the Library
 - Increasing education increases the likelihood this is their driver to come to the library
- Parents are more likely than the larger sample to be University Graduates
- Highly value early literacy and homework help but also value programs
- Parents are a key portion of the “less than 10 years in Canada” segment and a “language other than English spoken at home” segment
- Likely to be sharing their potential leisure time with Sporting Events and Community Centres
- Value work/study spaces, small business resources, digital literacy and makerspaces
- Value both weekend and weekday hours, with a preference for weekend

PARENTS VISIT THE LIBRARY TO “TAKE A CHILD TO THE LIBRARY.” DETERMINING WHAT CAN KEEP PARENTS COMING AFTER CHILDREN ARE TOO OLD FOR PROGRAMS AND STORYTIME IS KEY TO SUCCESS.



MILLENNIALS

Defined as respondents aged 18-34. 24% of entire sample.

- Value work/study spaces, small business resources, digital literacy and makerspaces
- Less satisfied with services, materials, website, hours and staff
- Young users with mix of education completion rates
- Less likely to be frequent users of the Library
- More likely to “Never think about going to the Library”
- Response rates for being able to book meeting and work spaces or small business support very high when compared to rest of sample
- Reported an increase in the rate of customers who would choose a branch based on the reading/work/study area, and increased value on work space and study space in Q18
- Use the website for hours
- More satisfied with WiFi and value it
- More likely to use the library if they could book a room or have group study rooms
- Value both weekend and weekday hours, with a preference for weekday

VALUE SPACE, DIGITAL SERVICES AND THE ABILITY TO GROW THEIR SKILLS: MAKERSPACES, JOB SUPPORT AND EDUCATION SUPPORT.

NON-USERS AND INFREQUENT USERS

Defined as users who answered less than 4 on the 7 point Likert scale in Q9 “I almost never think about using a Library”
Contains a mix of infrequent users and non-users. 8% of sample. More constructive and positive criticism from this group than only non-users.

- More likely to be 18-44 years-old
- More likely to be High School Graduates, or have incomplete college/university
- More likely to have children than the average sample
- Less satisfied with services, hours and staff
- More likely to go to the bookstore, movies, shopping or community centres
- Less satisfied with public libraries in Hamilton than the sample (-10%)
- Very positive response to flexible borrowing, fine forgiveness
- Value small business resources, technology and homework help
- See the Library as having a role in Truth and Reconciliation
- Want more hours but they may need outreach to learn more about our hours
- More likely to have searched for historical images on hpl.ca
- Value both weekend and weekday hours, with a preference for weekday
- Have had negative experiences at the library

VALUE LIBRARY SERVICES BUT DON'T CURRENTLY MAKE TIME FOR THE LIBRARY IN THEIR LIVES. MORE LIKELY TO BE GUILTY ABOUT FINES AND ARE MOST LIKELY TO RETURN TO THE LIBRARY DURING ECONOMIC HARDSHIP.



NON-USERS

Defined as those who answered that they haven't been to the library in over 1 year in Q13. 3% of sample.

- More likely to be High School Graduates, or have incomplete college/university
- Least likely to come to the library to browse the collection or pick up a hold
- Would come to the library to feel connected to the community
- Less likely to value library services overall and demonstrate less satisfaction with previous experiences
- Value computers, newspapers or magazine and reference services higher than all other segments
- See little role for the library in Truth and Reconciliation
- More likely to be shopping, at a sporting event, community centre, movie theatre or buying a book at a bookstore
- Wouldn't change habits if we changed weekend nor weekday hours
- Fine forgiveness was indicated as an issue, may be avoiding the library due to fines
- Possibly part of the group that transitions to using library during periods of personal economic hardship (ie. Recession, once disposable income higher they migrate to movie theatres and Chapters/Indigo)

NON-USERS FROM THIS SAMPLE DON'T VALUE THE MATERIALS AND COLLECTIONS LIKE THE OTHER SEGMENTS. THEY HAVE ALSO HAD MORE NEGATIVE EXPERIENCES OF THE LIBRARY THAN OTHER GROUPS.

NEWCOMERS

Defined as respondents who spoke another language at home or who had been in Canada less than 10 years. Nearly 10% of sample. The top five languages of respondents who indicated that they spoke another language were:

1. *Spanish*
2. *Chinese*
3. *Arabic*
4. *French*
5. *Polish*

The top three languages were very close, as Spanish, Chinese and Arabic together were 30% of the other languages sample.

- Parents who speak another language at home are more likely to be frequent users.
- More likely to be aged less than 54 years old with most of the sample 18-34
- More likely to be a University Graduate
- More likely to be a Parent, particularly of younger children aged 0-12 years
- See value in makerspaces, work/study space, homework help, small business resources and streaming/downloadable resources
- Value online newspapers
- More likely to use the library if they could book a room or have group study rooms
- Value both weekend and weekday hours, with a preference for weekend

SHARE VALUES WITH PARENTS AND MILLENNIALS, HIGHLY EDUCATED AND VALUE THE LIBRARY. WOULD LIKE TO SEE INCREASED HOURS, STUDY SPACE, SMALL BUSINESS SUPPORT AND MORE DIGITAL RESOURCES.



RESPONSE ANALYSIS

When analyzing the survey results it is important to remember that Seniors, Parents and University Graduates are at the core of our current business and are the majority of our results. Nearly all respondents reported choosing a branch based on convenience of location, with the exception of small group of Millennials which chose based on quiet study space.

CUSTOMER SATISFACTION

Q19: How satisfied are you with each of the following aspects of Hamilton Public Library and its services?

| | % Satisfied |
|--|--------------------|
| The helpfulness of Library staff | 93% |
| Overall quality of public Library service in Hamilton | 95% |
| The attractiveness and cleanliness of the Library I use | 92% |
| The variety of books and other materials available | 91% |
| The knowledge of Library staff | 90% |
| The Hamilton Public Library website (hpl.ca) | 89% |
| The Library's self-checkout system | 88% |
| The number of recently published books available | 78% |
| The hours of operation at my local Library | 74% |
| Recently released DVDs and CDs available | 61% |
| The Library's WiFi service | 61% |
| The variety of programs and classes offered | 56% |
| Ease of use of the ebook site | 48% |
| The selection of ebooks to download | 44% |

Digital offerings other than ebooks are highly valued by those under age 54, but significantly less important to Seniors who do value ebooks. Seniors, a very homogenous group, have reduced the importance of the other digital offerings.

Customers choose their branch based on location and how close it is from home. Younger users, those under age 44, use our website to look up service hours, while those aged 44+ and Newcomers prefer to call the Library with their questions.



VALUE STATEMENTS

Q10: For each of the following statements please indicate your level of agreement or disagreement:

| | % Agreement |
|---|--------------------|
| Libraries are important for the community. | 98% |
| Libraries support early literacy. | 96% |
| Libraries support lifelong learning. | 96% |
| Libraries are important for elementary and high school students. | 94% |
| Libraries are a trustworthy source of information. | 94% |
| I really like using public libraries in Hamilton. | 93% |
| Libraries should embrace innovation. | 92% |
| Libraries preserve local history. | 92% |
| Libraries provide critical access to technology. | 91% |
| Libraries play an important role in truth and reconciliation. | 82% |
| I almost never think about using a library. | 26% |

The consensus is high within the value statements. Any result above 85% indicates that the weighted average of respondents “Agree”.

The truth and reconciliation statement, University Graduates have created a substantial dip due to their ability to skew the results, 82% is still a 5.75 out of 7, with a 5 representing “Somewhat Agree” and 6 being “Agree”. This role is an excellent example of an opportunity to further explore our role in this emerging issue within the community and build something meaningful.

Similar but less substantial dips can be seen in local history, innovation and technology largely due to the infrequent users and Millennials who don’t understand the role of the library. Further outreach and education is required.

The statement “I really like using public libraries in Hamilton” dips below the other questions due to the respondents who have had poor experiences at the library, most notably the group of non-users and infrequent users.



PRIMARY DRIVERS FOR LIBRARY VISITS

Q18: When you visit the Library is it to: (Check all that apply)

| | % of Respondents |
|--|------------------|
| Pick up specific items that are on hold for you | 75% |
| Browse for books of interest to borrow | 72% |
| Browse for CDs, DVDs, or Blurays to borrow | 49% |
| Take a child to the library | 38% |
| Get information on a topic of personal interest | 33% |
| Find a quiet place to study or read | 27% |
| Use the computers | 26% |
| Personally attend a lecture, meeting or program | 21% |
| Feel more connected to the community | 19% |
| Read newspapers or magazines | 18% |
| Space to work | 17% |
| Find specific information for school or work | 15% |
| Other (please specify) | 10% |
| Meet new people | 9% |

When analyzing the results of this question it is important to keep in mind that respondents were able to choose multiple drivers so the total for all choices will be over 100%. Browsing and holds pickups are drivers only for the heaviest user groups: Seniors, University Graduates and Parents. Parents were also most likely to visit the library because they are “Taking a Child to the Library.”

Notably Newcomers and Non-Users shared several drivers including “Feel more connected to the community” and those about computer use, study/work space and to reading newspapers and magazines. Millennials were more likely to choose work/study space and computers but were less likely to browse or put items on hold. Non-Users were not driven to place items on hold or browse for books or CDs/DVDs, showing between 33% and 21% reductions in those categories. The reduction in putting items on hold was consistent in all infrequent and non-users as was less importance on the browsing collections.



IMPORTANCE OF RESOURCES

Q8: Hamilton Public Library offers many services, how important are the following for you?

| | % Importance |
|--|---------------------|
| Reserve or renew books online | 88% |
| Best selling books & ebooks | 78% |
| Free WiFi | 76% |
| CDs, DVDs & Bluray borrowing for free | 73% |
| Programs and performances for all ages | 71% |
| 2 bookmobiles and 22 locations across the city | 70% |
| Storytime and other programs for children | 65% |
| Digital local history and archives collection | 65% |
| Access to newspapers and magazine articles online | 64% |
| Book clubs for all ages | 64% |
| Space to work/study | 62% |
| Homework help for children and teens | 61% |
| Music, movies and Television streaming and downloads | 60% |
| Resources for small business and entrepreneurs | 58% |
| Public computers with MS Office and Photo/Video editing software | 57% |
| Makerspaces with 3D printers, large format printing, media recording & more | 53% |

To our core users, placing holds is very important. Seniors felt all services other than best selling books were less important than all other sample groups, but holds were the least unimportant at only -5% off the entire sample while work study space fared the worst with a -39% off the sample.

The group most likely to disagree with the Seniors were the Non-Users. They discounted all traditional library services, most notably: collections, online holds, programs and location diversity. Non-users declared homework help and resources for small business as more important and showed no change from the sample for makerspaces.



SERVICE CHANGES

Q10: How much of an impact would each of the following statements make in encouraging you and your family to use the public library more often?

| | % Impact |
|--|-----------------|
| If the library had programs or special events that interest me | 78% |
| If libraries had the most recently published books and I didn't have to wait for the book to become available | 75% |
| If the libraries were open later on the weekend | 69% |
| If the library had a wider range of ebook titles | 69% |
| If the libraries were open later on weeknights | 67% |
| If the library had good spaces that could be used for work or study with up to date technology for individual or group use. | 67% |
| If it was easier to download ebooks from the library | 67% |
| If the library had more flexible borrowing and return policies | 66% |
| If the library had better wireless internet WiFi access | 64% |
| If the library showed me how to setup and download ebooks | 62% |
| If the library had more fine forgiveness programs | 58% |
| If I could book a room in a library for business use | 51% |

It is important to look at the results of this question by demographics, a 4 on the Likert scale (neutral) about 57%. This means business use and fine forgiveness in the entire sample fared poorly. Keeping in mind that two sections of the core users, University Graduates and Seniors saw little value in changing anything and Seniors in particular were strongly against changing anything other than ebook help, it is important to look at this question through the lens of specific demographics.

Non-Users were only positive (above sample response rates) for fine forgiveness, WiFi, ebook help and business use. The mixed Non-Users and Infrequent Users were above the sample for all categories. The greatest differences were for business use (+22%), WiFi (+15%), and fine forgiveness (+13%). These three priorities had similar intensity of increased importance for Parent, Millennials and Newcomers

Changes to hours were important to Millennials, Parents, Newcomers and Non/Infrequent Users. Weekends and weekdays importance depended on which segment, Parents and Newcomers, put a priority on the weekend, while Millennials and Non/Infrequent Users were more positive about weekday changes. Overall the survey was clear, hours changes are integral to HPL's continued success and very important to those surveyed.

None of these changes would be worthwhile if communication strategies and promotions were not fully funded and supported. Many comments to the open ended question asked for changes we had already made in branches at the time of the survey, letting the public know about changes in a responsive manner is an ongoing challenge.



CONCLUSION

Our foundational group of core-users are satisfied with our services and are looking for minor improvements in collections, hours and services.

Parents are enthusiastic about taking their child to the library but can find our hours challenging. After their children have “aged out” of our Children and Youth Services programming they no longer have a reason to visit the library. As a Library we need to learn how to transition these parents from bringing their young children to the library to valuing us as a partner for their own lifelong learning and leisure time.

Millennials, Newcomers and Non/Infrequent Users share many values and priorities. All would like to see increased hours, although for them it may be more important to communicate that our hours are changing. These demographics also need increased education and awareness of our new services like makerspaces and digital collections. They are not frequent users and will require more work to reach.

Non-Users and the mixed group of Non-Users and Infrequent Users had increased sensitivity to fines and wanted to know how they could fit the library’s spaces within their lives. Fine forgiveness programs for newcomers, students, high school students or specific neighbourhoods would be able to go a long way in bridging those gaps.

The mixed Non-User group also indicated that they had had poor library experiences in their satisfaction of service scores. This could be due to particular experience or stem from their own perception of what the library is. Through further research we can gain insight into how the library is viewed and its role in poverty by different demographic groups would be valuable. From this survey it is likely that strengthening the role of the library as a community hub and as a place for barrier free education will improve the library’s status for those non-users.

