Javier Stanziola, Ph.D.
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1. Introduction

This research briefing interprets data and research on library users and non-users. It presents demographics for these groups, discusses reasons for using library services, barriers to use and makes recommendations on lines of action to pursue to increase and sustain use of library services.

1.1. On Data Sources: Most of the figures used for this briefing come from "Taking Part", the national household survey on participation in the cultural sector, including libraries, museums and archives. With a rolling sample of up to 28,000 households per year in England, Taking Part is produced in line with the National Statistics protocols to give it added quality assurance. This means that it represents official national statistics on cultural participation and provides us with the best, most reliable and most representative data on use and non-use of libraries. *(See Bibliography below for full list of research and data used for this briefing.)*

2. Summary: How to Increase and Sustain Participation in Libraries?

46% of all adults in England visited a library at least once in 2006-07. 60% of them visited a library at least 12 times that year, amounting to more than 288 million visits in total. That same year, 72% of 11-15 year old children in England visited a library at least once. However, visits have decreased by close to 5% since 1997/98, with total book issues dropping by more than 30%. For non-users, negative perceptions of libraries are fairly deeply entrenched and there is a strong sense that libraries are 'not for me'. Research on how to attract and maintain non-users to libraries suggests that in addition to improving the core and extended offers libraries provide, coordinated communications campaigns to re-brand and re-position libraries amongst a number of target groups are urgently needed.

3. Library Users and Non-Users: Who are they?

- More than 18 million adults in England used public libraries in 2006/07. This represents more than 46% of this population, with 60% of them visiting a library at least once a month. This amounted to more than 288 million visits to libraries in 2006/07.
- Adult library users tend to be non-white, highly educated, and likely to have children. There is no particular regional pattern of library use, except in Yorkshire where there is a significantly lower level of participation than in the rest of England.
- It has become apparent, however, that over recent years there has been a decline in library use. For instance, the number of library visits has dropped by close to 5% since 1997/1998, with total book issues decreasing by more than 30%. This signals a change in library user behaviour or a less appropriate fit of current library provision with what users require.
- The profile of library non-users does not fully follow the typical demographic patterns in terms of "priority groups". Whilst limiting disability and lower socio-economic groups tend to be more prevalent amongst non users, their profile is inevitably more complex. Mirroring figures for users, the typical non-user is older, white, educated below A-Levels and has no children.

- Finally, we know that library use is relatively high for people under 16 but drops drastically amongst young adults (from 72% of 11-15 year olds visiting a library at least once in 2006/07 to 47% of 16-24 year olds). This trend is not reversed as people get older. In fact, only 44% of 45-64 year olds visited a library that year and only 37% of 75+ year olds did.

4. Reasons for using Libraries
- The main reason for visiting a library is to borrow/return/renew books (66% of users). This means that users are attracted to the 'traditional' core service libraries have to offer.
- However, from 2001/02 to 2005/06, there has been a noticeable drop in those citing "books" as their reason for visiting a library (from 70% to 65%) and an increase in the use of computers/internet and a place to "sit to study/work/read (from 6-9% to 14-19%).
- We know that those who were taken to libraries as a child have significantly higher recent attendance rates that those who were not (57% and 39% respectively).
- Finally, there is no evidence of a link between expenditure and visits. For the same spend per head, some library services get two or three times the number of visits as others. There is no obvious correlation between library book stock and visits.

5. Why don't they visit?

- Interestingly, it is not "books" that stop adults from using libraries. Only 9% of non-users cite "get books from other sources" and "prefer to buy books" as their main reasons for not visiting a library.
- 45% of non-users cite "lack of time" or "no need to go" as the main reasons for not visiting Libraries. These answers, albeit simplistic, do suggest that this group is either indifferent or altogether hostile to libraries. This tells us that any actions to counteract this issue would fall under the realm of new audience development.
- This is supported by qualitative research that suggests that for non-users, negative perceptions of libraries are fairly deeply entrenched and there is a strong sense that libraries are 'not for me'. For instance non users between the ages of 14-35 viewed current libraries users as the sort of people that they do not want to be like. Furthermore, awareness of new and improved facilities was very low amongst non-users, even where modernised facilities were 'on the doorstep'.
- The high proportion of users who cite "books" and "CDs" as the main reason for their visits do suggest the impact that improving libraries' core product could have on infrequent users or those who have never visited a library. However, non users between the ages of 14-35 feel that the services offered by their library had little or no advantage over other sources of similar services – and in some cases were second rate by comparison. They also felt that any recognisable strengths of libraries (e.g. free Internet access) met a minority need and were not unique. Current users were often of the same opinion, considering libraries to offer little that was better than could be found elsewhere.

6. Policy and Programme Implications
There has been sufficient rigorous, reliable and relevant research on use and non use of libraries. This body of work, complemented by case studies on best practice,

suggests that strategies aimed at changing the product alone or engaging in communications campaigns without fundamental changes to libraries' core and extended offers are doomed to fail. Instead, the following two lines of action need to be pursued jointly to increase and sustain participation in Libraries.

6.1. *Excellence in Servicing existing users*: Maintaining existing users and improving the nature of their experience at libraries requires the use of the traditional marketing tools (e.g., 4 Ps). In particular,

- Place: Refreshing library interiors (décor and furnishing) to be welcoming, comfortable and modern/up to date would counter perceptions of old-fashioned, oppressive environments. Presenting the service in a positive and relevant light would make libraries a more real alternative to seductive retail environments. Libraries should allow for some variety and separation within their buildings (e.g., more or less noisy areas) to accommodate the range of users.
- Product: Improving stock to place a greater focus on contemporary material. Roll out or extend up to date borrowing processes (e.g., email reservation, loan extensions, drop boxes) to improve access and usability.
- "Price" or Value: Improve the 'destination value' of the library by attaching or combining additional services that users wish to use and fit with both a leisure and reading or informal learning mindset, e.g. the provision of an appealing café, inclusion of exhibitions and other events (either regular or occasional).
- Promotion: Promoting new stock with displays and other mechanisms to raise awareness and assist users in finding inspiration could increase relevance and interest as well as the perception of invitation to use. Request services are one way of ensuring that new stock would at least be considered and introduced by libraries. Finally, since library use is influenced by visits as a child, existing work around family learning, Youth Board, Bookahead and Books for Boys should be seen as valuable marketing and audience development opportunities.

6.2. *Excellence in Breaking Barriers for those Indifferent or Hostile to Libraries: Re-branding and Re-positioning Libraries*

- Research suggests that even in libraries where some or all of the changes listed above have taken place, non visitors report lack of awareness of all these improvements and remain unconvinced of the value that libraries can add to their lives. This suggests that additional investment is needed on raising awareness of new library services through targeted communications campaigns.
- This work could be linked to public relations campaign to challenge and change assumptions that indifferent and hostile non users have about libraries and their services. Research suggests that key groups to target include alpha consumers or local champions amongst 16-24 year olds and working adults under 44 without children.

7. Bibliography

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