



**Southern
Ontario
Library
Service**

Environmental Scan for Ontario Public Libraries

Prepared for Southern Ontario Library Service
Prepared by Kestrel Info Services
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Compiled for SOLS by Kestrel Info Services

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INTRODUCTION

This Environmental Scan has been prepared to provide library planners with an overview of some of the issues, concerns, and opportunities facing public libraries in Ontario in 2011. It also attempts to identify the trends which will impact library development in the immediate and medium-term future.

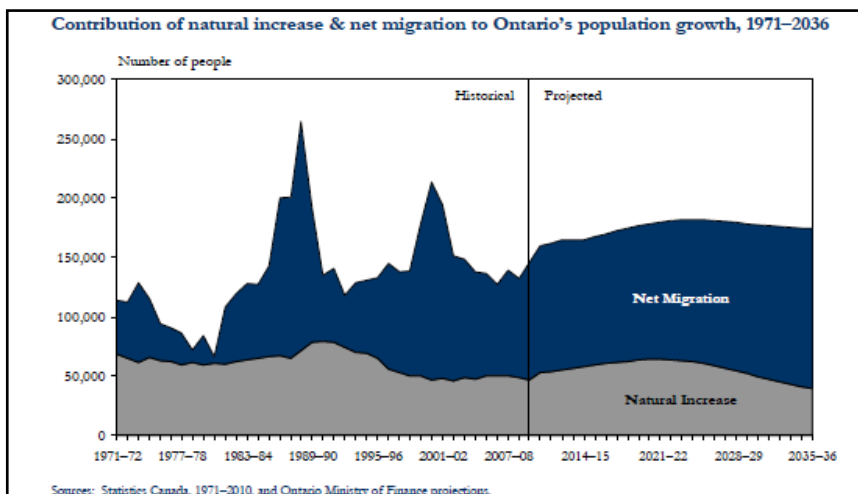
The document looks first at significant trends in Ontario, Canada, and elsewhere that will most likely influence library decision-making and strategy. It then looks at some of the most dominant issues influencing developments within the library world. Planners will need to consider the information within the context of local trends and issues. The scan is necessarily fixed in time, and draws attention to just some of the many issues of which planners need to be aware. Responsible planners will also engage in continuous tracking of issues that are significant to their library.

SECTION 1: EXTERNAL TRENDS INFLUENCING LIBRARY DEVELOPMENT IN 2011

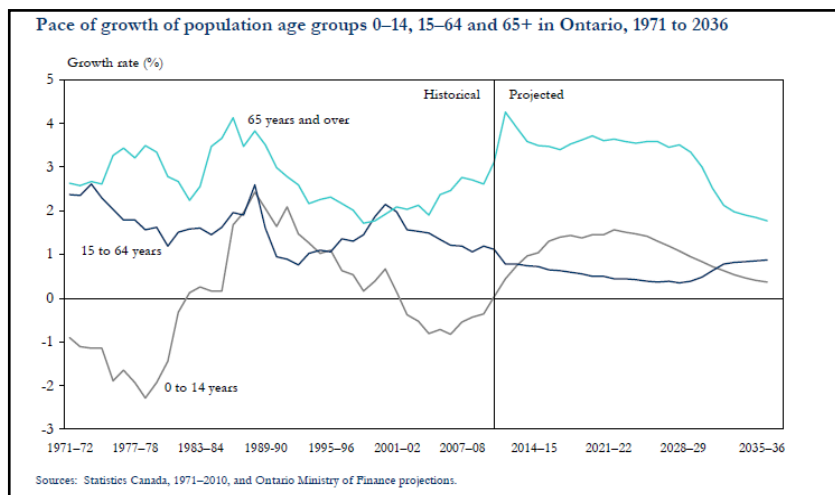
POPULATION

In May 2011, the population of Ontario was estimated to be just over 13 million, or 39% of the Canadian population¹. Despite increases in recent years, the birthrate is still lower than the rate required to maintain population levels² and immigration is expected to account for 68% of Ontario's population growth between 2010 and 2036, as shown in Figure 1.

Figure 1³.



In 2011 the first baby boomers reached the age of 65⁴ and in Ontario the number of seniors will increase from 1.9 million people (13.9% of the population) in 2011 to 2.3 million (15.6%) in 2016, and 2.7 million (17.5%) in 2021. At the other end of the spectrum, the number of children aged 0-14 will remain stable at about 2.2 million during the next five years, but will then rise more rapidly. Figure 2 illustrates how the population will change for children, adults and seniors between now and 2036.

Figure 2⁵.

The 2006 Census⁶ recorded that 3.4 million Ontarians (more than one in four) were born in another country. Most of the 2.7 million Ontarians (22.2%) who described themselves as a member of a visible minority lived in a Census Metropolitan Area⁷, and eight out of ten newcomers chose to settle in the GTA⁸. The Census also showed that more than 55% of immigrants' children have their parents' mother tongue passed on to them.

In 2029 the GTA will account for just about half of the province's population. In other regions of Ontario, the percentage share of the population will correspondingly decrease, but the actual population will continue to grow slowly except in the Northwest region.

242,490 Ontarians (2%) described themselves as being of Aboriginal identity in the 2006 Census. 20% lived on reserves, and 18% lived in rural areas⁹. Unlike other cohorts, the Aboriginal population is growing at a rate of 6.6%¹⁰. Although this population is also aging, it will remain proportionally younger than the Canadian non-Aboriginal population.

THE ECONOMY

In 2010, service industries accounted for 75% of Ontario's economy¹¹. Traditional industries, such as manufacturing, are feeling the impact of changing customer needs, the US recession of 2007-2009, and outsourcing to other countries. Although the provincial government is encouraging new investments in innovation, science and technology, and green initiatives¹², commentators note that the thriving resource industries in Alberta, Newfoundland and Labrador, and Saskatchewan are shifting wealth to these provinces¹³. Despite such challenges, however, the medium to long-term forecast for Ontario's economy in September 2011 is reasonably optimistic¹⁴.

Nevertheless, business and consumer confidence is still weak due to concerns about American and European public debt. Higher energy and food prices are impacting the cost of living, and the high value of the Canadian dollar against the American dollar has not translated into the lower prices for goods consumers were expecting¹⁵.

The 2007-2009 recession had a significant impact on employment in Ontario. By August 2011, some recovery was taking place but the unemployment rate in Ontario (7.5%) was still higher than the national average (7.3%). Nationally, unemployment rates hit youth and men especially hard during the recession¹⁶.

A shortfall in trade skills is rapidly approaching as many skilled workers in construction and other trades approach retirement. Government, educators and employers are developing strategies to increase apprenticeships and interest in trades as a career.

Over the last five or more years, a consistent message has been delivered: the gap between rich and poor in Canada is growing. In 2009 over 10% of Ontarians lived on a low income¹⁷, and in March 2010 food bank use in Ontario increased by 30,000 families and individuals (7.4%), compared with March 2009¹⁸. The number of children living in poverty is increasing, and families with a single parent, families of Aboriginal identity, racialized families, and children with a disability are most likely to be living in poverty. People over 65 (especially women) and adults with a disability are also vulnerable¹⁹. A significant proportion (40%) of people nearing retirement fear their savings will be inadequate for their future needs²⁰.

PUBLIC POLICY

The public sector is seeking to eliminate deficits despite rising costs and increasing needs in key areas of public service, such as health. The demands and deficits have resulted in the spotlight being turned on efficiency at all three levels of government, and the 2011 Ontario budget predicted that the province will remain in deficit until 2017-2018. Programs to reduce numbers of employees in federal and provincial government²¹, as well as in some municipalities²², were reaching the implementation stage during 2011.

In other areas of public policy, the Ontario government has gradually been introducing the standards associated with the Accessibility for Ontarians with Disabilities Act 2005 (AODA), enacting accessibility standards for information and communication, the built environment, and employment, with which libraries will have to comply.

LITERACY & EDUCATION

It is now well-documented that children who have access to good early learning opportunities are likely to learn to read more easily and are much more likely to be successful throughout their school years and in adult life. In September 2010 the government of Ontario began implementing its plan to achieve free full-time kindergarten for all four and five year olds by 2014²³.

Student literacy at Grades 3, 6, and 9 continues to be maintained or has improved, according to the tests in literacy and mathematics administered annually by the Ontario Education and Accountability Office (EQAQO)²⁴. High school graduation levels are improving in Ontario and in 2010 81% of high school students graduated²⁵.

Four out of ten adults in Canada have low reading literacy levels, and within this cohort over one third has difficulty with simple reading tasks or has serious difficulty reading any printed materials²⁶. Despite this worrying statistic, the Canadian Council on Learning reports that "Canada is doing better than most OECD countries in ensuring that students learn to read and write, regardless of the family's household income."²⁷

Ontario's school boards continue to have varying policies toward school libraries. *Some boards strongly support the presence of professionally staffed libraries in their schools, while others are reducing or eliminating library space and/or staff.* The number of public schools with teacher-librarians has declined in Ontario from 80% to 56% since 1997, and from 78% to 66% in high schools²⁸. The Ontario pressure group People for Education reported in 2010 that 53% of Ontario schools fundraise for library books²⁹.

More parents are opting to educate their children at home. Precise data isn't available, but according to the Ontario Federation of Teaching Parents there are an estimated 60,000 children being homeschooled in Canada, and about 20,000 in Ontario³⁰. In 1996 a Statistics Canada study reported only 17,500 homeschooled students nationally³¹.

Distance learning is coming of age, and post-secondary institutions offer a growing range of online remote learning courses. More provinces, including Ontario, offer public schools a framework for delivering the curriculum online.

The term "literacy" now applies to much more than the ability to read and write fluently. The terms "information literacy," "digital literacy," and "financial literacy" reflect awareness that, in order to carry out daily tasks successfully in the 21st Century, individuals need to be competent at finding and assessing information, able to use computer technologies successfully, and able to find their way around basic financial activities such as credit card use, savings plans, and how to fund housing and other household expenditure.

TECHNOLOGY & TELECOMMUNICATIONS

Efficient access to the Internet now determines how well an individual, business, or organization can function in society and the economy. More and more services and products rely on fast, robust connections and, for individuals, access to the Internet has a significant impact on their ability to apply for education, employment, and government services. Personal online networks are increasingly essential for maintaining social contact, and more mainstream entertainment and recreation is moving away from traditional channels and onto to the Internet. The rapid rise in downloading 'bandwidth-hogs' like movies, videos and games is central to debates about the pricing of Internet connectivity.

Canadians now spend more time online than watching TV³², and most people now regard access to the Internet as a fundamental right³³. The figures tell us that 79% of Canadian households have access to the Internet (81% in Ontario), but outside urban areas this figure drops to 71%³⁴. 23 million Canadians use the Internet, and surveys are showing that age is no barrier to use, with people over 55³⁵ and pre-schoolers alike among the growing cohorts of users³⁶.

Currently, the Canadian governing agency for broadband, the CRTC, has set a 2015 target for all households to be able to access broadband at five MbPS (megabytes per second) for downloading and one MbPS for uploading³⁷. However, in 2011, major telecommunications companies were already announcing their plans to roll out the next generation of connectivity in urban areas, which has download/upload speeds in the region of 6.5MbPS and 5MbPS respectively. 75% of Canadians have access to broadband, but where broadband isn't available the high statistic brings little comfort, especially as telecommunications companies and government fail to agree on how to fill the gaps.

CONSUMER TECHNOLOGY

Mobile technology is fast becoming part of everyday life, and mobile applications (or “apps”) are on every technology planner’s to do list. E-book readers, tablets (such as the iPad) and *smartphones* are ubiquitous. In June 2011, 41% of Canadians owned a smartphone³⁸, and in the USA, research has shown some indication that for people with lower incomes, smartphones will become the main means of accessing the Internet³⁹.

Gesture-based technology, location-based apps and services, and the fusion of TVs with computers are among the recent innovations that are now in the mainstream of consumer use or on the cusp of widespread adoption.

Consumer behaviour has been characterized as moving from material consumption to experience consumption. This is exemplified by music, TV programs, and movies, which can all be downloaded and enjoyed without ever possessing or owning a copy. Downloading media has revolutionized the concept of ownership in the music industry, and now the book trade is facing the same issues.

Attitudes towards computer and online games have changed dramatically in recent years. Vastly popular with children, teens and adults alike, computerized games have been identified as having a unique ability to engage learners’ attention. It is expected that schools will use game-based learning increasingly as more products become available in the next two to three years.⁴⁰

Similarly, social networks such as Facebook, YouTube and Twitter are changing the way we communicate and are no longer just for kids and youth. Many business strategies now invest heavily in social media, and the Pew Research Center reported that at the end of 2010, 16% of Americans over the age of 74 were using social network sites.

However, the most important development for libraries has been the popularization of e-books. Throughout 2011, various statistics were announced demonstrating that e-book sales are outselling print books⁴¹ in terms of quantity sold (although print still generates more revenue). The explosion in e-reading has increased the acute challenges facing the traditional book trade at a time when it is also being severely tested by the strategies of dominant Internet companies such as Amazon, Apple, and Google. The rise of the e-book has also added new issues to the ongoing debate over copyright and digital rights management (DRM) which has dogged the evolution of electronic access to media. In the arena of new e-book publications, the traditional rights of purchasers, authors, publishers, libraries and vendors are still in flux, and controversy continues concerning the rights and obligations of each stakeholder.

THE 21ST CENTURY WORKPLACE

The Canadian workforce is getting older, and many people are opting to continue working beyond the age of 65⁴². By 2021 it’s possible that one in four people in employment will be over 55. At the same time as it is graying, the workforce will become more diverse because the children of immigrants will comprise a significant cohort of those entering employment.

As in every other aspect of our lives, technology is part and parcel of organizational life in the 21st Century. Technology affects every area of work, enabling staff to work more efficiently as well as providing an essential channel for delivering services or products, and for interacting with suppliers, customers and stakeholders. Expectations about work have changed, with more employees working wherever they happen to be, whether at home, in the office, or at the local coffee shop. The strict division between work and personal time is eroding as employers exert more demands on their employees and, at the same time, employees are expecting greater flexibility about where and when they put in their working hours⁴³.

The days of isolated desk jobs are disappearing, and collaborative teamwork is emerging as the preferred model for achieving goals that no longer sit neatly within single departmental or job responsibilities. Strong hierarchies are giving way to flatter structures, and dependence on top-down innovation is being replaced with the recognition that, in the complexities of the modern world, no single individual or group has unique access or insight to the solutions that lead to organizational success. The decline in the formality of working hours and hierarchies is reflected in the growing use of public space, such as cafes or libraries, to meet with colleagues and customers.

The pace of change is such that, within planning cycles, and on a day-to-day basis, organizations must adopt a culture of continuous innovation and enhancement in order to stay relevant and to retain and expand their customer base. Leaders, stakeholders and employees must realize that as their organization engages in perpetual evolution, it is imperative that they too, as individuals, must embrace change and become comfortable with the new dynamics driving their environments.

SECTION 2: PUBLIC LIBRARIES

LIBRARY PROGRAMS AND SERVICES

Self-service, new developments in library automation, electronic resources, and mobile technology are hand-in-hand changing the way libraries are used and how library staff can be deployed. Library users can now check-out materials, place holds and find much of what they want without assistance, from wherever they happen to be, and at a time that suits them best. Staff has been “unchained” from the reference and circulation desk and can now work more flexibly to support users where they need help, either online, at the shelves, or at the computers. They carry mobile devices as they rove throughout the library, and can be available to users wherever they need help.

Yet despite all the changes taking place in how people access and use information and books, the importance of libraries continues. A Federation of Ontario Public Libraries (FOPL) survey in 2010⁴⁴ found that library membership has remained consistent over the last ten years, and that people primarily use online services as a way to supplement their visits to the library. Ontarians still believe libraries are important, especially for reading, study and obtaining information, but their importance as an information source has somewhat diminished now that online information access is ubiquitous. Interestingly, levels of non-use also remain much the same as a decade ago. The researchers’ report suggested that “being all things to all people may not be a sustainable strategy in the information age: a segmented approach for communicating with, and serving the needs of, the library’s different communities will likely be required.”

Since 2008, American public libraries consistently report that people impacted by the recession use the library more than previously for borrowing materials, accessing computers, attending programs, and applying for government and other support⁴⁵. Where public libraries provide the community's only free access to the Internet, the library and its staff play a key role in enabling people to search for work online, and apply online for jobs or benefits, demonstrating that libraries are even more important to the community when times are tough⁴⁶.

LIBRARY RESOURCES

The impact of the e-book on the book industry and on libraries will be profound and enduring, and it will take time to understand the full implications. E-books have been part of most libraries' collections for several years, but the popularization of e-book readers in 2010 and 2011 proved to be the tipping-point for e-book adoption. Allocation of resource budgets to e-books will necessarily grow in response. The existence of consortia is helping libraries meet the demand cost-effectively, as they facilitate access, affordability and administration. Librarians everywhere are engaged in discussions with publishers, retailers and vendors to ensure that libraries' and borrowers' needs are heard as the dynamics of electronic book publishing develop.

Offering access to a wide range of electronic databases is now feasible for even the smallest public libraries in Ontario, thanks to provincial funding and consortia. These resources make it possible for small and rural libraries to meet the information demands of their residents more than ever before. They also extend the reach of rural libraries by offering remote access to information, making geography less of a barrier than it used to be.

Despite the tremendous changes that public libraries are experiencing, the library 'brand' remains strong. Research based on surveys of Americans⁴⁷ has demonstrated that people of all ages continue primarily to associate libraries with borrowing books, music and videos, and continue to place high trust in the information they get from libraries. *As e-book reading moves into the mainstream, and technology continues to disrupt traditional formats, business models, and consumer behaviours, libraries are nevertheless well-placed to build on their established position as the community's 'go-to' resource for reading and other media.*

Innovations are taking hold that reflect the dominant trend of focusing on the library user's experience. Eye-catching signage, and library materials displayed face out, as in bookstores and supermarkets, have become standard. Libraries are innovating successfully by introducing browser-friendly alternatives to the Dewey Decimal System. In Ontario, Markham Public Library's award-winning system, C3 Customer Centred Classification, has garnered much interest, while in the United States a user-friendly arrangement of collections is central to the transformational Anythink brand adopted by Rangeview Libraries (CO).

LIBRARY FACILITIES

Flexible, smart, green, and spacious are the four primary themes to be found in contemporary library architecture. Libraries are designing spaces that can be more easily reconfigured according to changing needs, that use technology to maximize the quality and cost-efficiencies of library service, and which increase efficiency and sustainability through environmentally sound design⁴⁸. Exciting new designs and colour schemes are being explored, resulting in more 'people space' and less collection space. Outdoor spaces and community 'living rooms' also feature prominently in new and renovated library buildings as libraries position themselves as community hubs and crucial public spaces⁴⁹.

Externally, new libraries are recapturing their sense of presence and profile in the community and, like the 2005 Whitby Central Library, are being designed to be an ‘anchor’ in the design of the community landscape. Inside libraries, retailers’ techniques are adopted to enhance the presentation of collections. A sense of space is created with the inclusion of reader lounges, Wi-Fi enabled study space, and by ensuring that all resources are accessible in accordance with Ontario legislation. Inside and outside, library designers are providing visually approachable, user-oriented, and interactive environments for small and large libraries alike. Examples in Ontario include new facilities in Fort Frances, Port Perry (Scugog Public Library), and Toronto.

Where community needs fit the service model, some libraries are investing in automated kiosks to provide access to library collections. *Ottawa Public Library*⁵⁰ has installed a kiosk to increase library reach in smaller communities, and *Toronto Public Library* will be installing one at *Toronto’s Union Station* as a way to serve commuters. At a kiosk, library users can access books in the same way they might buy candy from a machine, and sometimes also pick up holds which they’ve ordered online. Elsewhere, ‘staffless’ libraries are made possible by restricting entrance by borrower card, with staff visiting regularly to restock and maintain the collection⁵¹. As part of the Ontario government’s \$15 million investment in public libraries, nine public access points (called ‘kiosks’) have been installed in remote, northern communities, providing access to provincially funded e-resources, interlibrary loans and virtual reference⁵².

LIBRARY TECHNOLOGY

Nowadays, more than ever, technology is an essential part of planning for more efficient and effective library operations, and offers far more than the ability to automate the catalogue and circulation systems. For example, solutions such as Software as a Service (SaaS) enable libraries to implement much more flexible library management systems, including discovery platforms (which make using the catalogue similar to the ‘Amazon experience’). SaaS also enables the library to provide access to its website in different languages. Such developments mean that libraries can now cost-effectively provide users with the kind of websites and online services and interactions consumers take for granted with retailers, government, and service providers.

Libraries are using social media to engage users in conversations about books and other media, to keep them up-to-date with programming, and to engage the community in discussions about the future of the library. But more importantly, social media changes the dynamic of the library user’s relationship with the library. Social media lets library users participate spontaneously in conversations with the library, respond to library postings, review books, post images and videos to library sites, and initiate their own conversations at will.

A robust technological infrastructure is now central to a library’s overall success.

Technological solutions are essential for providing standard library services and for carrying out workplace operations and communications efficiently, whether on desktop or laptop computers, tablets, or smart phones. In addition, through training and self-development, individual staff must achieve strong levels of comfort and competency with technology-based responsibilities. If public libraries of all sizes are to continue to be useful and relevant in their communities, they must develop planning and budget models that will adequately support continuous investment in the development of technology and associated skills⁵³.

POSITIONING LIBRARIES FOR THE FUTURE

Adequate funding for present and future operations is, as always, high on the list of library priorities. In Ontario, libraries are experiencing success in achieving funding goals where they work closely with the municipality. Such libraries have learned to express library objectives and achievements in ways that mesh the library's work with the known goals of the municipality. They also express the library's activities in terms of specific and measurable benefits received by the community, and as a return on investment for tax dollars. The SOLS manual titled *The Library's Contribution to Your Community* assists libraries to make the case for funding in terms that are meaningful to their primary funder. Another example is the research carried out by the Federation of Ontario Public Libraries which libraries can use to reinforce local evidence about the importance of libraries in achieving childhood and adult literacy in the province⁵⁴. These tactics strengthen relationships with the municipality and also mean that, when asked, library supporters can express very specifically why the library is so important to them.

In Ontario in recent years, provincial funding has been directed more toward outcome-based strategic support of specific programs which strengthen the development of infrastructure or support strategic initiatives. The \$15 million investment made in 2008, and the connectivity funding that has been annually granted since 1999, are two examples of this government strategy. One of the consequences of funding being directed to particular outcomes is that funders expect that those who receive funding can document the outcomes or benefits achieved as a result of the funding. In addition to measuring library activity in traditional ways, library staff need to become proficient in outcome based measurement.

In other jurisdictions, unprecedented cuts in public spending have had a critical impact on public library development. For example, in the UK, library systems have been asked to explore working in partnership with neighbours to deliver technical services. They have also been tasked to explore the outsourcing and privatization of library operations, and to consider keeping small libraries open by replacing staff with volunteers⁵⁵. In the USA, the running of a small number of libraries has been turned over to an external business which promises increased efficiency and reduced costs⁵⁶. In both countries, these radical solutions have resulted in major advocacy campaigns protesting the proposals, some of which have reversed local cutbacks.

In the coming decade libraries will need to adapt and reshape their services to engage users, promote equity of access and identify ways to deliver services more effectively, according to a report commissioned by SOLS in 2010⁵⁷. One example of how libraries are adapting is by engaging in partnerships and collaborative efforts. Such collaborations may be with other libraries, with community organizations, or with other partners. They are motivated by the desire to use resources more efficiently, provide library facilities through shared locations, reduce duplication, and/or to achieve strategic developments collaboratively which might otherwise be beyond any one player's capacity.

The public library mandate connects well with many municipalities' economic and social strategy to strengthen the cultural and creative life of their communities. In the 21st Century, innovation is a key driver of economies⁵⁸, and innovation thrives where creativity and cultural life is valued. For towns or cities of all sizes and character – such as Prince Edward County and North Bay⁵⁹ – their cultural character is becoming a major platform in plans to attract and retain the businesses and individuals that contribute to a modern economy. The library is an essential factor in a community's culture: it is a resource, participant and catalyst in the cultural landscape. Savvy Ontario libraries are therefore ensuring their own strategies engage fully with the development and delivery of their municipality's cultural plan.

As funding becomes more scarce, and competition for it intensifies, library boards are devoting time and energy to developing leaders who understand the dynamics of municipal government. The public library sector needs leaders who are committed to ensuring that the public library is endorsed locally as a valued municipal service, well connected to and integrated with other community services. A growing number of library boards and CEOs are putting concerted effort into relationship building, and understanding the municipality's strategic directions. As a result, they are finding a variety of ways to work more closely with municipal decision-makers. They have learned to convey the many ways in which library programs and services contribute significantly to municipal priorities.

CONCLUSION

It is clear from this discussion of trends impacting libraries that the people who determine the success of Ontario's public libraries – that is, the combined human resources of leaders, trustees, staff, and volunteers – are being asked to face a future in which change is continuous. Technology is changing all aspects of our lives and social communications. E-books will forever change reading habits and how people use libraries. Access to information and information technology is more important than ever. Community meeting places – including libraries – are developing enhanced roles that help people come together and build capacity to solve complex community issues.

Despite ongoing challenges to fund priorities and essential developments, libraries have been energized by these emerging dynamics. When planning, Ontario's libraries, individually and collaboratively, will experience many opportunities to develop and extend their services in ways that couldn't have been achieved in the past. The future will also offer ways to introduce efficiencies for delivering services in libraries and remotely. For well-prepared libraries, the coming era will be characterized not as a time when innovation is stifled due to economic uncertainty, but as a time when change is accelerated in order to respond to the challenges and opportunities of the constantly evolving library environment in Ontario.

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