

CAP, Network 2000 and the Electronic Library

Marketing Study

**Prepared by Virtual Library Inc.
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Executive Summary

Both the Ontario and the federal government are looking at ways to provide citizens with equitable electronic access to information. Network 2000 is the Ontario government's strategy to provide all Ontarians with electronic access to the full resources of its libraries including the Internet. The Community Access Program (CAP) is an Industry Canada program that provides seed funding for Internet access projects in communities of less than 50,000 people across Canada.

Both CAP and Network 2000 are looking for ways to generate revenue and become self-sustaining by providing a range of new public and private services through the "Electronic Library." Virtual Library Inc. was contracted to determine market demand for the proposed services among library users, and to determine how librarians assessed the proposed services. The study was divided into two parts: a consultation of 1337 library users in urban and rural communities, and key informant interviews with ten librarians across the province

Library Users

Respondents to the consultation document were predominantly employed females living in rural communities who are heavy users of the library. Over 88% of the respondents said they used a computer at work, home, school or the library. This usage is apparently driving the high level of interest in a wide variety of on-line services.

Library users consider access to library services on-line to be their number one priority. Health information, on-line education (distance learning), government services and publications are the next highest priorities. Sixty four percent said they would pay a small membership fee for discounts on on-line services and products.

The demand for on-line services on a pay-for-use basis was significantly less than the "free" services mentioned above. With the exception of on-line access to some databases, interest in other on-line services for a fee was below 30%. Fee-for-service offerings will need to be carefully targeted based on local conditions and marketed well to be successful.

Library users did not express a strong interest in promoting events by sponsoring or advertising on the library web pages.

Librarians

Librarians see a marketing opportunity in creating an image of libraries as a progressive part of an information access infrastructure. In other words, librarians perceive a need to market an updated image of libraries as "local information centres" i.e. "One Place To Look" for information of all types.

They are also, however, often philosophically opposed to becoming a "commercial centre." Their experience has been that the revenue generated by charging fees for services is not sufficient to warrant the administrative costs.

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Computers in libraries are heavily used by a wide variety of people. While traditional library reference resources and help are still the services most frequently requested, there is increasing demand for Internet access, electronic mail, and business materials and services.

There is a steady increase in the use of digitally stored material and more demand to access it from home. Librarians report increasing interest in information and reference materials, rather than recreational reading.

Most librarians agree that libraries are becoming the point of access for information. “Information access is the public utility for the second millennium”, said one librarian

Recommendations:

The results of the study showed opportunities for marketing electronic services for CAP and Network 2000. The five key recommendations are:

1. Build self-sustaining projects

Building sustainable services is a priority for both CAP and Network 2000. Short and long term strategies are required and could include:

- Delivering government services and information online via CAP sites and Libraries. A fee would be paid by governments to the CAP and Library sites (the public is very interested in government information, e.g. small business registration, court information, municipal information, driver’s license renewals, tourist information). Network 2000 could provide the delivery system including the automated administration services needed to make it cost effective for the Libraries and CAP sites.
- Building business partnerships with the private sector to generate support and revenue. Use the delivery of government services as “proof of concept” to demonstrate the effectiveness of the system and to establish a customer base. Businesses will be more likely to see CAP and Libraries as viable partners once they have tangible results.

2. Continue market research to refine opportunities

Both library patrons and key informant librarians show a keen interest in accessing and delivering library services on-line. We recommend that research continue to gain more knowledge of the market segments represented in the existing user base before expanding the services to new markets. We also recommend testing the extent of the opportunities identified in this report in focus groups.

3. Provide core services electronically to retain youth market

All libraries, in response to high public demand, are moving forward quickly on providing technological access to information. Demand, however, continues to exceed supply and funding cuts mean shorter hours and fewer staff. At the same time the “youth market” expects to use computers and to access services online. Libraries need to look at innovative partnerships to be able to provide continuous electronic access without charging user fees, especially if they want to appeal to younger audiences.

4. Develop policy directions on partnerships and sponsorships.

Librarians are interested in developing partnerships to provide services, but tend to be philosophically opposed to becoming a “commercial centre.” Some partnerships (i.e. with government) are generally accepted, but we recommend that broad policy directives be developed to give guidance around advertising, sponsorships and partnerships as opportunities to provide funds. The Library Act needs to be clarified or amended to give libraries the freedom they need to be effective in their communities.

5. Market the “ONE PLACE TO LOOK” image

Librarians clearly see themselves as being in the forefront of information technology and are aware that, to stay relevant, they need to continue to be leaders in the field. We recommend that libraries design and promote their “ONE PLACE TO LOOK” image to promote themselves as “the” information access points.

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1. Background

The Community Access Program (CAP) is an Industry Canada program that provides seed funding for Internet access projects in communities of less than 50,000 people across Canada. Network 2000 is the Ontario government's strategy to provide all Ontarians with electronic access to the full resources of its libraries including the Internet. Network 2000 is now being implemented in 50 library systems across the province.

Both CAP and Network 2000 are looking for ways to generate revenue and become self-sustaining by providing a range of new public and private services through the "Electronic Library". This marketing study was designed to determine market demand for the proposed services among library users. In addition selected librarians were asked for their assessment of the proposed services.

Virtual Library Inc. was contracted to undertake a two-phased marketing study funded by Industry Canada.

2. Methodology

The marketing study was divided into two phases; a consultation document completed by 1337 library users in urban and rural communities and key informant interviews with 10 librarians across the province. The consultation document covered three main areas:

- it profiled the library users and their computer use and knowledge
- it asked library users to identify what types of traditional library services or new library services they would like to receive electronically via a computer in their libraries, or from a computer in their homes, schools or workplaces
- it assessed the willingness of library users to pay for some types of services.

The consultation document used in the study is shown in Appendix 6.1.

Interviews with librarians were conducted by telephone (approximately one hour per interview) and focused on the librarians' reactions to the types of services library users said they wanted to receive. For example, librarians were asked:

- do you see them (library services identified by library users) being important to your library users?
- if not, what electronic services do you see your library offering?
- what do libraries need to deliver these services to library users?

Findings from the library users' consultation and the interviews with librarians have been summarized and presented in this report along with recommendations for marketing Network 2000.

A step-by-step description of the process used for this study is included in Appendix 6.2.

3. Results of Library Users Consultation

Over 11,000 consultation documents were distributed through the fifty library systems and seventy individual libraries involved in the first phase of the Network 2000 rollout. Libraries from both urban (populations over 50,000) and rural communities from across the province were included. A complete list of libraries participating in the consultation process is in Appendix 6.4.

3.1 Key demographics

Of the 11,000+ consultation documents distributed to the libraries, 1337 were returned for a return rate of about 12%. This is exceptionally high given the approach used for the consultation process.

A profile of the library users who participated in the consultation process is shown below in Table 1: Library Users by Age, Gender, Occupation and Community Size.

Other key information about the library users who filled in the consultation document is shown in Table 2: Frequency of Library Use by Age, and Table 3: Computer Use by Age. More detailed demographic information is contained in Appendix 6.5.

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Table 1: Percent of Library Users by Age, Gender, Occupation and Community Size
 (Cells are % of Variable—e.g. Salaried, Full Time, Age 30-49 is 20% of the Total Occupation Variable)

Age	Gender		Totals	Occupation							Community Size	
	Male	Female		Salaried	Self-	Student	Unemployed	Other	Urban	Rural		
			Age	Full Time	Part Time	Employed	Full Time	Part Time				
14 - 18	5	5	10	< 1	1	0	7	1	1	0	3	8
18 - 29	7	9	16	4	3	1	4	1	3	1	7	10
30 - 49	17	33	50	20	10	8	<1	<1	5	6	21	29
50 - 65	8	10	18	6	3	2	0	<1	1	6	7	11
66 - 74	2	2	4	<1	<1	<1	0	0	<1	3	2	2
75 +	1	1	2	0	0	0	0	0	0	1	<1	<11
Totals %	40	60	100	30	18	11	11	3	10	17	40	60

Table 2: Frequency of Library Use by Age
 (Cells are % of Table)

	More than 4x's/month	Less than 4x's/month	Once every 3 months	Less than once every 3 months	total
14-18	6	3	1	0	10
18-29	11	4	1	1	17
30-49	30	15	3	2	50
50-65	12	5	1	0	18
66-74	2	1	<1	0	4
75+	<1	<1	<1	0	1
total	62	29	6	3	100

Table 3: Computer Use by Age

Age	Use Computer	Do Not Use Computer	Totals
14 - 18	10	<1	10
18 - 29	15	1	16
30 - 49	46	4	50
50 -65	15	3	18
66 - 74	2	2	4
75 +	1	1	2
Totals	88	11	100

The three tables show that the population of library users in our sample is predominantly female, employed, rural, and heavy users of the library. The most surprising statistic is the level of computer literacy. Over 88% said they used a computer at work, home, school or the library. This usage is apparently driving the high level of interest in a wide variety of on-line services.

Usually new technologies have initial usage rates that are fairly low given the potential benefits. For example, the introduction of Automatic Teller Machines produced utilization rates of about 30% even though they offered significant benefits - fewer lineups, 24-hour access and lower service charges - over a bank branch. ATM's were new and unfamiliar and it took several years and aggressive promotion to increase the utilization rates.

In contrast to the ATM story, the library users in our sample expressed strong levels of interest in a number of on-line services. Over sixty percent said that on-line access to traditional library services was important or very important. Sixty four percent said they would pay a small membership fee for discounts on on-line services and products. Most businesses looking to introduce a new product or service would be thrilled with these numbers.

3.2 Demand for on-line services

Library users consider access to library services on-line to be their number one priority. Health information, on-line education (distance learning), government services and publications are the next highest priorities. Table 4: Library User Demand for On-line Services, lists the services and the percentage of respondents who indicated which services were “very important” or “important”. Respondents who indicated the services were “somewhat important” were excluded from the totals.

Table 4: Library User Demand for On-line Services (No Fees)

Rank	On-line Services	%	Comments
1	Traditional Library Services	61	Catalogue, Reserves, Renewals, New Books
2	Health Information	60	Medically Approved Health Information
3	Distance Learning	59	In cooperation with Community Colleges and Universities
4	Government Services	58	e.g. Drivers License Renewal, Permits
5	Local Job Listings	58	Links to other on-line job banks
6	Basic Directory of Local Companies/Services	55	Name, Address, Phone, Email
7	Detailed Directory of Local Companies/Services	55	On-line yellow pages + details of services and products
8	Government Publications	52	Federal, Provincial, Municipal
9	Local Seminars/Workshops	51	Both public and fee for service
10	Listings of Community Events	49	Recreation, Social, Political etc.

The high level of demand for the services listed above did not carry over to retail shopping over the Internet. Making retail purchases by computer or catalogue shopping ranked near the bottom of library user priorities. Only 29% of respondents found on-line retail buying “very important” or “important” and only 25% wanted catalogue shopping. Levels of demand for other services are shown in Appendix 6.6.

3.3 Demand for on-line services for a fee

The demand for on-line services on a pay-for-use basis was significantly lower than the “free” services listed above in section 3.3. With the exception of on-line access to commercial library databases (43%) and on-line access to business, scientific and technical databases (34%), interest in other on-line services for a fee was below 30%. These percentages were reduced even further when library users were asked if they would pay a fee to access them. Less than a third of the library users who indicated these services were “very important” or “important”, were willing to pay for them. Real demand for these services would appear to be where demand for ATM use was in the early 1980’s. Fee for service offerings will need to be carefully targeted based on local conditions and well marketed to be successful.

Table 5: Library User Demand for On-line Services—Fee for Service, lists the proposed fee for service offerings, the level of demand and willingness to pay.

Table 5: Access to On-line Services Ranked by Demand (Fee For Service)

Rank	On-line Services	Demand %	% Willing to Pay
1	Commercial Library Databases	43	32
2	Personal Electronic Mail	36	36
3	Business, Scientific and Technical	34	31
4	Document Delivery	27	36
5	In-depth Research	26	34

3.4 Revenue generating opportunities

Library users did not express a strong interest in promoting events by sponsoring or advertising on the library web pages. Only 25% indicated this was “very important or important”, and only 30% of that group said they would be willing to pay for the privilege. Again this would seem to argue that local conditions would dictate the real opportunities for generating revenue this way.

Membership fees for access to new on-line services are another matter. Over 64% said they would be willing to pay a small annual fee to get discounts on the proposed on-line services and products. This represents a very good opportunity for the libraries which are part of the Network 2000 program. Virtual Library Inc will offer new services and a cost-effective system of collecting and administering the payments through Network 2000. Eliminating the administrative overhead removes one of the major barriers identified by the librarians to offering services for a fee.

4. Overview of key informant interview results

Following the survey, key informant interviews were conducted with ten librarians from various centres around the province. The librarians in this group were selected because they were seen as actively promoting the use of new services using technology. (A complete list of key informants and a copy of the key informant interview guide are included in Appendix 6.3).

These interviews focused on the librarians’ reactions to the types of services library users said they wanted to receive. Questions were developed to get a sense of whether there was agreement between librarians and patrons on the importance and relevance of specific new and existing electronic services. Librarians were also asked what they might need to deliver these services to library users.

4.1 General observations

Librarians generally show willingness and excitement about the opportunities to increase the public’s access to information with the use of technology. Philosophically, they see equitable public access to information and the library’s traditional role as a source of materials as a measure of our civilization. They also see a marketing opportunity in creating an image of libraries as a progressive part of an information access infrastructure. In other words, librarians perceive a need to market an updated image of libraries as “local information centres” i.e. “One Place To Look” for information of all types.

They are also, however, often philosophically opposed to becoming a “commercial centre.” While not totally averse to charging fees for specific services such as research, overdue book fines, and insurance for

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video rentals, their experience has been that the revenue generated by the process is not sufficient to warrant the administrative costs. They also believe that, although people say they are willing to pay for services, they do not mean it, or the fees they have in mind are so low as to make the charge pointless.

Other general observations:

- the public wants convenient and quick access to information, i.e. research, medical information
- the public is very interested in government information, e.g. small business registration, court information, municipal information, driver's license renewals, tourist information
- there is increasing interest in job bank and job search information
- librarians are interested in developing partnerships to offer these services, that is, to consolidate the efforts and time of groups with similar mandates and with available grant money
- librarians also have some interest in corporate partnerships that make sense and fit into the mandate of providing access points for information, e.g. printing, computers, software
- librarians do not appear to realize the extent of Internet use in the workplace, or how rapidly computer literacy has spread in the past few years. They underestimate the public demand for on-line services available through the Internet.

4.2 Computerization of libraries

All libraries we spoke to have computers with a variety of purposes:

- to access card catalogues
- Internet access for research, job search
- word processing, spread sheets, etc.

All libraries report heavy use of their computers by a wide variety of users. The types mentioned most frequently are students and job seekers of all ages. Most libraries use a reservation system of sorts for access to computer time; some charge fees for access to computers. While librarians report that traditional library reference resources and help are still the services most frequently requested, there is increasing demand for more Internet access, electronic mail, more multi-media, more word processing, and more business materials and services. These results are consistent with the responses from library users.

Most libraries do not have enough computers to serve the demand. Computers are used from the time libraries open to the time they close. Different methods are used to restrict computer use for various reasons for example, e.g. reservations for computer use, charging for computer time, signed agreements by patrons on computer conduct (e.g. agreement not to access pornographic sites).

There is a steady increase in the use of digitally stored material and more demand to access it from home. Librarians report increasing interest in information and reference materials, rather than recreational reading. This shift is being seen in library budgets - one library reported that its budget for non-fiction is now greater than the budget for fiction. One librarian speculated that electronic access to library services is attracting users who might not otherwise use the library, especially teenagers and some adults

Most librarians agree with the results of the public consultation that the most frequent library users are between 30 and 49 years of age. "Kids" - elementary and high school students - are also considered to be a significant population. One librarian estimated that 40% of her users are in the younger age group. People looking for jobs are another significant and relatively new group.

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Most librarians report a demand for small business services. Some libraries are already offering services for small businesses including:

- commercial databases
- business registrations
- word processing/spread sheet computers, colour printer, scanner
- customized research (fee-based)
- document delivery (by fax, e-mail, courier)
- orientation programs
- instruction on computer use
- some e-mail

This seems to contradict the results of the public consultation. The self-employed respondents represented 11% of the total sample. Of the 11%, few were interested in library services.

One library had a small business service which was discontinued when the grant ran out. It had not become self-sustaining. Another library had tried to set up a small business service in partnership with other community organizations, but it collapsed over disagreement about contributions and funding. Both librarians agreed, however, that with good partnerships and long term marketing, the small business service would survive. In the meantime, custom research is being provided without a charge .

Remote access services, where they exist, are apparently well used. Library users ranked on-line access to traditional library services as their number one priority. This is particularly important in the north and rural areas where distance is a factor for users and many satellite libraries have been closed. Libraries with websites report heavy use. This is an obvious area for expansion and upgrade and is consistent with the findings of the library user consultation.

4.3 The changing role of libraries

Most librarians agree that libraries are changing from being the provider of information sources to being the point of access for information sources and providing the training in using them. “Information access is the public utility for the second millennium”, said one librarian. In other words, the basics won’t change, but how they do it will change.

All agree that to remain relevant, the library must keep pace with technology and the demand for information of all types. Libraries need to be seen as true community information sources, not just a source of print recreational reading. Again this is consistent with the demand for on-line access to all types of information through the library.

4.4 Free on-line services

Traditional library services

All the librarians have traditional services available on line, or are planning to implement services in the near future. The level of sophistication varies. Usage is high. Some librarians spoke of “blending” catalogues, e.g. partnering with school libraries.

Medically approved health information

Librarians report a high degree of public interest. Various responses to this demand were reported, including:

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- purchase of approved databases
- partnership with Victorian Order of Nurses to purchase specific health information
- partnerships with local hospitals, medical professionals
- bookmarking of certain Internet medical information websites

While librarians are happy to respond to the demand, their concerns include:

- concern about validity of information being accessed over the Internet
- staffing issues (health information specialist) to monitor information being provided
- liability issues
- work stations/space issues

Education and distance learning

There was definite interest in this area, but many barriers. Offering this service would precipitate a dilemma of jurisdiction, space, and support. For instance, libraries do not want to take on the education role that schools are struggling with; there is not time, money or space to support highly specialized reference sections.

The role for the library appears to be to act as a catalyst, a go-between between the information-seeker and the information-provider. Most do not want to see libraries becoming responsible for content.

Local job listings

Librarians report a high degree of public interest and use of the service where it is available. Some libraries offer HRDC job listings in partnership with HRDC; some have funding from HRDC, others are negotiating to get the funding.

Access to government services

There is a high degree of public demand and, generally, correspondingly high interest among librarians to offer the service. The public is looking for information on municipal regulations, small business information, divorces, wills, small claims court, driver's license information etc. "It will happen; we will welcome it," said one. Librarians see the library's role to be an access point for government forms, regulation information, and databases.

The general enthusiasm is tempered by a few points of resistance. For instance, two libraries report no plans to implement the service. One librarian said access to government services would be "the last choice

Barriers were also perceived to be significant, including:

- reluctance on the part of "political masters"
- space
- equipment
- cost
- staff (especially specifically trained advisory staff)
- lack of unified government strategy

4.5 Commercial on-line services

General observation

The public interest in commercial services is relatively low (25%). Librarians perceive that revenue generation from these services would be too low to make offering them worthwhile. Currently revenues generated are deducted from operating grants. (One library has set up a foundation separate from the library to raise funds for “non-core” services, e.g. a personal computer lab).

Commercial services need broad-based negotiation to gain benefits, e.g. province-wide negotiations with software distributors or CD-ROM suppliers. One librarian reported that the Ontario Library Association is negotiating licenses with vendors to reduce costs.

Barriers to fee-based services include:

- political issues
- financial instability
- restrictive Library Act
- staff reductions

Commercial library databases

Librarians do not perceive a huge potential in offering commercial library databases for a fee, although some are looking into it. “We don’t charge for our reference services in print; why would we charge for a reference service in electronic format?” asked one. One librarian suggests that funding should be based on partnerships e.g. through the Chamber of Commerce, rather than through user fees. Patrons are reported to be reluctant to pay for information in the end, even though they say they might be willing. One library had offered these services for a fee, but had discontinued it, presumably because of lack of interest.

Barriers:

- staff reductions would make it difficult to help people conduct searches of databases
- costs (could look at cost sharing)
- philosophical opposition to charging for information that is part of the library’s ‘core’ services

E-mail

There was mixed reaction to offering e-mail services. Some demand from users was reported. One library offers the service free through Hot Mail; another librarian says that since it’s for personal use, a fee should be charged; some local commercial operators are offering it and libraries do not want to compete.

Barriers

- monitoring use of e-mail, e.g. there are issues on downloading files
- lack of computers
- Hot Mail is already free
- lack of support from governance boards, funding sources
- could not charge enough to make it worthwhile

Access to business and scientific databases

Librarians have mixed reactions to offering these databases for a fee. Some libraries already provide this service at no charge. One library reports some demand for this service, with users saying they would pay

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for it, although that willingness has not been tested, because the library does not offer the service. Two librarians noted that this service is offered for a fee on university campuses.

Document delivery

Librarians see an opportunity in this service. They perceive that the public would probably be willing to pay for an efficient quick document delivery service. “The pace of our lives means that there will be a demand for it.” One librarian even suggested a “drive through library”. The patron would call in to request information. The fee would be charged to a library “smart card”. When the information was ready, the patron would collect it a drive by window.

Customized research

There is some interest in offering customized research for a fee. The demand appears to be moderate. Small business owners, for instance, are perceived to be a market for this service, but libraries would need more staff to offer it.

The service is seen as highly specialized service, so charging a fee encountered less resistance from librarians than other services.

Enthusiasm is tempered, however, because “evidence indicates that no library has made this work”; a couple of pilot projects are not doing well; librarians perceive that people are not willing to pay for information.

Membership Fee

Under the Libraries Act membership fees are not allowed for existing library services. Whether or not the libraries are able to charge for new services is not clear to some of the librarians.

The librarians do not believe that the public would actually be in support of user fees because they have always had access to free information at public libraries. User fees are perceived to be a barrier to equitable public access to information; one librarian reported that Edmonton lost two thirds of its membership when it charged user fees. The library users contradict this. Sixty-four percent said they were willing to pay a small membership fee for discounts on on-line products and services.

Some librarians perceive that there may be some support, but they believe that the public is thinking of a very low fee which would not be cost-effective to administer. There is some support for the notion of a fee using a smart card covering certain specialized services, e.g. renewals or reserves from home, although the upfront costs are perceived to be high.

There is more interest in developing partnerships to get the funds needed to expand or change services to meet the demand. Librarians perceive that to generate public support and public funding, libraries need to market an image of themselves as a progressive element of a new infrastructure.

5. Recommendations for marketing electronic services for CAP and Network 2000

Our recommendations are based on an analysis of the results of both the public consultation and the key informant interviews with librarians.

5.1 Build self-sustaining projects

Building sustainable services is a priority for both CAP and Network 2000. Marketing services which collapse from lack of funding do not boost the confidence of either users or providers of services. Creating self-supporting projects and library programs requires both short and long term solutions as described below.

5.1.1 Deliver government services and information for a fee

Both librarians and patrons indicate a strong interest in accessing government services and information on-line, and the various levels of government need to deliver services more conveniently and at a lower cost. But access to government services and information is not offered in all libraries. For instance, Human Resource Development Corporation databases, or Ontario Ministry of Consumer and Commercial Relations workstations are available only in a few locations. Also, the funding allowed for those services seems to vary between libraries. Province wide negotiations would provide more consistency in both areas.

We recommend that both governments and libraries move forward quickly to provide on-line access to government services and information through CAP projects and libraries. Network 2000 should be used to deliver and administer the services through its automated administration and on-line transaction monitoring capability. CAP sites and libraries would provide the access points. Government would fund the system and provide the marketing and advertising needed to generate public awareness. Given the high level of interest from library users, it's likely that notifying consumers of the availability of these services would create sufficient use to warrant the time, effort and cost of implementing the service.

We recommend that government bodies and library associations negotiate jointly to facilitate the same services being offered in both libraries and CAP sites. Fees paid to the libraries and CAP sites must be equalized. Funding based on a fee per transaction, or on a per capita basis could work. Either or both could be offered to CAP sites and libraries.

This model provides the funding needed to sustain existing operations and give CAP and Network 2000 sites the money needed to develop new businesses.

5.1.2 Build business partnerships with the private sector to generate support and revenue

The business community is a largely untapped source of both support and revenue. But developing partnerships with the private sector will require time, money and persistence. Business partners are reluctant to invest in public sector organizations unless they see clear and ongoing benefits. They are interested in market size and type, increasing consumer awareness of their products, opportunity to gain public goodwill, or direct access to the consumers. Once CAP sites and libraries have demonstrated they can deliver new electronic services for the government and develop an established customer base, businesses will be more likely to see CAP sites and libraries as viable partners in any number of joint ventures.

We recommend that library organizations negotiate as a group with corporations that have a province wide presence. This would give the libraries a stronger bargaining position and offer the corporations a larger market. For instance, province-wide negotiations with software developers would give access to a large target market of software users through library websites. This in turn would give the libraries the leverage they need to negotiate more beneficial sponsorship arrangements. A similar approach could be taken for CAP sites with Industry Canada taking a lead role.

5.2 Continue market research to refine opportunities

Both library patrons and key informant librarians show a keen interest in accessing and delivering library services on-line. We recommend that research continue to gain more knowledge of the market segments represented in the existing user base. It will cost less to establish electronic services within the existing community of library users than it will to attract new users. Once electronic services are up and running within the existing library user community it will be easier (less costly) to expand the services to new markets. The extent of the opportunities identified in this report need to be tested in focus groups.

5.3 Provide core services electronically to retain youth market

All libraries, in response to high public demand, are moving forward quickly on providing technological access to information. Demand, however, continues to exceed supply and the trend appears likely to continue. At the same time, funding cuts mean that libraries are shortening hours and cutting staff. If libraries want to continue to appeal to young audiences used to getting information in digital form, they need to look at innovative partnerships that would provide the funds to be able to offer the public continuous electronic access to traditional library services without charging user fees.

5.4 Develop policy directives on partnerships and sponsorships

We recommend that broad policy directives be developed to give some guidance around advertising, sponsorship and partnerships. The Library Act needs to be clarified or amended to give libraries the freedom they need to be effective in their communities.

Public support for user fees is higher than expected. Librarians, however, tend to have philosophical issues with becoming a “commercial centre”. While some partnerships (e.g. with government) seem to have enough acceptance to move forward quickly on a broad basis, other partnership and sponsorship opportunities that would provide funds to develop new services will need more careful consideration.

At the same time, however, while libraries need flexibility to respond to their communities’ needs, broad agreement on policies will allow them to be equitable and fair when negotiating local sponsorship or partnership arrangements.

A task force should study the Library Act to determine whether its restrictions are detrimental to developing other funding opportunities for libraries.

5.5 Market the “ONE PLACE TO LOOK” image

Librarians clearly see themselves as being in the forefront of information technology as it applies to the organization of information. They are keenly aware that to stay relevant to current and future generations, they need to continue to be leaders in the field. We recommend that libraries as a group design and promote their “ONE PLACE TO LOOK” image to promote themselves as true information access points.

6. Appendix

6.1 Public consultation document

Introduction

This document is part of a public consultation process designed to assess the public's interest in electronic services provided by the public library. This study is sponsored by Industry Canada as part of the Community Access Program (CAP is an Industry Canada program that brings public Internet access to communities of 50,000 or less in populations). You can help your library determine what electronic services may be provided by completing this document and returning it to the Confidential box in the library.

EVEN IF YOU DO NOT COMPLETE THIS DOCUMENT WE WOULD APPRECIATE HEARING FROM YOU. Simply return the blank document to the Confidential box in the library and indicate on the following lines why you are not completing the document.

Part I: About You

1. Age Range:

- under 18 18-29 30-49
 50-65 66-74 75+

2. Gender

- Male Female

3. Occupation (check all that apply)

- salaried employee full time part time
 self-employed/business owner
 unemployed
 student full time part time
 other (please specify) _____

4. What language do you speak most of the time?

- English French Other _____

5. Community Size

- population more than 50,000
 population less than 50,000

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6. How often do you use the library?

- more than four times a month
- less than four times a month
- about once every three months
- less than once every three months

7. What do you use the library for? (Check all that apply)

- borrowing library materials for personal use, e.g. pleasure, entertainment
- research in the library for school
- research in the library for work/business
- use of electronic databases (e.g. CD-ROM based), the Internet, etc.
- other: (please specify) _____

8. Do you use a computer?

- Yes No

9. Where do you use a computer now? (Check all that apply)

- Work Home School Library Other (please specify) _____

10. For what purpose? (Check all that apply)

- Work Home School Other (please specify) _____

11. Do you have access to an on-line service such as AOL, CompuServ, a bulletin board system or the Internet?

- Yes No

12. Would you require training to use the Internet?

- Yes No

Part II: Potential Electronic Services from the public library

Your library is exploring a variety of electronic services to offer its users. They would be accessible **from any computer connected to the Internet**. The computer could be in your home, school, business, or a CAP site located in a community centre or library. Listed below are some of the services which are being explored.

Please rate the importance of **each** of the following potential services to you

Level of Importance

4 = Very Important	3 = Important	2 = Somewhat Important	1 = Not important
x = Don't know/no opinion			

13. Library services provided electronically:	Importance to you (please circle)				
• remote access via the Internet to library services, e.g. catalogue, reserves, renewals, new items	4	3	2	1	x
14. Computer access to community information services (information about recreation, government, health care, social services, volunteer agencies and businesses in your community):	Importance to you (please circle)				

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• a computer directory of local addresses and phone numbers of the services listed above	4	3	2	1	x
• a more detailed computer directory (i.e. hours, programs, types of service) somewhat like the “yellow pages” in your phone book, of the services listed above	4	3	2	1	x
• computer listing of community special events, e.g. fairs, parades, walkathons, public announcements, fundraising appeals	4	3	2	1	x
• computer listings of local volunteer job opportunities	4	3	2	1	x
• local job listings on the computer and links to other computer-based job banks	4	3	2	1	x
• medically approved health information	4	3	2	1	x
• registration for community recreation programs using a computer	4	3	2	1	x

15. Computer access to commercial services provided through an electronic library “store”:	Importance to you (please circle)				
• education and distance learning through the computer, e.g. community college/university courses	4	3	2	1	x
• computer access to networking services for small business, e.g. chat group, bulletin board	4	3	2	1	x
• computer listings of local seminars and workshops, including professional development, volunteer training	4	3	2	1	x
• new author services: access through the Internet to previously unpublished books, articles, and new Internet magazines	4	3	2	1	x
• ability to purchase retail products through the computer, with home delivery i.e. computers, books, household items, groceries	4	3	2	1	x
• computer access to catalogue shopping, e.g. Sears	4	3	2	1	x

16. Computer access to government services:	Importance to you (please circle)				
• government publications (federal, provincial and municipal)	4	3	2	1	x
• government services (federal, provincial and municipal), e.g. driver’s license renewals, new business registration, municipal permits and applications	4	3	2	1	x
• computer access to municipal government documents, i.e. new legislation, minutes and agendas of committees	4	3	2	1	x

Part III: Services for a fee

Access to some electronic services provided by the library may require payment of fees. These fees would help support the library. Please rate the importance of each of the following services. Then indicate whether you would, in either a work or personal capacity, be willing to pay fees for them:

17. Computer access to commercial services for a fee:	Importance to you					Would you pay?	
	4	3	2	1	x	yes	no
• personal e-mail address i.e. a personal electronic mail box available through a computer in your community for people who do not have access to e-mail at their home or business	4	3	2	1	x	yes	no
• in-depth customized research consulting services	4	3	2	1	x	yes	no
• delivery of requested documents to your home or business	4	3	2	1	x	yes	no
• computer access to commercial databases listings of articles, books CDs, etc. by author, subject or title	4	3	2	1	x	yes	no
• computer access to specialized business, scientific and technical indexes and full text databases	4	3	2	1	x	yes	no

Part IV: Advertising and Promotion

If you are interested in advertising in your community, please indicate how important this opportunity would be for you, and whether you would be willing to pay a fee for advertising. (The fees would help support the library).

18. Advertising opportunities:	Importance to you					Would you pay?	
	4	3	2	1	x	yes	no
• advertising or sponsorship opportunities for any of the library's electronic services	4	3	2	1	x	yes	no

Part V: Payment/Membership

19. If you are willing to pay for any of the fee-based services listed above, how would be you be comfortable paying? (Check all that apply)

- By credit card over the telephone
- Through the Internet provided your credit card number is secure
- Neither option is acceptable. Please explain _____

20. If any of the services listed above were available to you at your library, would you be interested in paying a small annual membership fee to get discounts on them and other products?

- Yes
- No

Thank you for the time you took to complete this document.
We appreciate your support.
 This document was prepared by VL Inc. on behalf of Industry Canada.

6.2 Market Study Process

The marketing study included two phases and a total of eight key steps divided as follows:

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Phase 1: Consultation with Library Users

1. Develop Project Framework

We reviewed the relevant background information from CAP (urban and rural) programs, Network 2000 and the Volunteer Links Program.

2. Develop library user consultation process:

We developed the consultation document for the library user consultation, and determined the process to obtain a relevant sample of library users.

3. Consult with representatives from the Ontario Library Association

We conducted a telephone conference call with key librarians from the OLA on survey protocol, content and distribution.

4. Library User Consultation

We distributed 11,000 consultation documents through fifty library systems and seventy individual libraries. Librarians were requested to put the documents in a monitored public area in the library, e.g. the reference desk or information desk. Library staff distributed the documents randomly to adult patrons, at various times during the day. To increase the number of returns, we requested that staff ask patrons to complete and return the document to library staff, while they were in the library. The document took about ten minutes to complete

We entered results received from 1337 library users in the consultation document.

5. Survey Results

We analyzed and summarized the results of the consultation with library users.

Phase 2: Key Informant Interviews with Librarians

6. Develop interview guide and schedule interviews:

Based on the results of the consultation of library users, we developed a guide for interviews with librarians, selected librarians to be interviewed (after approval from MCZCR and OLA) and scheduled interviews.

7. Conduct key informant interviews with librarians and analyze results

We conducted key informant interviews with ten librarians from around the province, analyzed the results, and compared the findings with the information gained from the consultation with library users.

8. Prepare Market Study Report and Recommendations

We developed recommendations and prepared the Market Study Report..

6.3 Key informant interviews: List of interviewees and interview guide

Key Informant interviews were conducted with the following librarians

Wendy Newman	Brantford	519-756-2223
Brian Nimeroski	Timmins	705-360-8520
Beverly Brucha	ThunderBay	807-344-3585
Eleanor James	Oakville	905-815-2042
Jane Horrocks	Richmond Hill	905-770-0311
Sam Coghlan	Oxford County	519-421-1700
Sandy Cameron	Pickering	905-831-6265
Paul Walker	North Bay	705-474-4830
Peggy Walsh	Kitchener	519-743-0271
Robert Hubsher	Cornwall	613-223-1475

The following questions were used in the key informant interviews:

Library use/patronage

1. Do you have computers for public use in your library? How many?
2. If yes, who uses them the most, what do they use them for and how heavily are they used?
3. The survey showed that the most frequent library users, that is, people who visit the library more than four times a month, were between 30 and 49 years of age. Is this consistent with your experience?
4. What types of services are you most frequently asked for?
5. Do you get a lot of queries related to small business? Do you have a service for small business owners?
6. Is there a demand for computer services that are not available at the library? What kind?
7. Do you know what percentage of your library users access library services through external computers?
8. Have you seen a change in the past two to three years in the types (what do you mean by types-Age, sex etc.?) of people using the library, either in person or by computer access? (They can't possibly know who accesses by computer).
9. Do you see the role of the library changing? If so, how?
10. Where do you see the opportunity in terms of future library patronage? For instance - should libraries be planning to appeal to patrons or potential patrons based on age, sex, income, on-line vs. walk-in?

Free services

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I'm going to give you a list of the top five services, in order of importance from all respondents, that they would like to have through on-line access. For each of the services, I'd like to get your responses in the following areas:

- Do you have this service already? How much is it used? By whom?
 - If not, do you have current plans to implement this service?
 - If not, do you see your library implementing the service.
- If so do you see yourself doing this in partnership with other public or private organizations.
- How do you see the service being implemented.
- What challenges there would be, or how simple it would be. Do you see any barriers e.g. Costs, finding partners, computer equipment, staff and staff training, technical support.
- How would you pay for the service? Existing budget, fees charged to service providers or some other method.
- What is the libraries role in providing the service. Public access point for those without access to a computer? Marketing the service to the public? Coordinator of content providers. Acting as a guarantor of service quality? Other?

On-line traditional library services, e.g. catalogue, reserves, renewals and new items was important to them.

(61% of respondents said this service was important or very important)

Medically approved health information

(60% of respondents said this service was important or very important)

Education and distance learning through the computer, e.g. community college/university courses

(59% of respondents said this service was important or very important)

Local job listings on the computer and links to other computer-based job banks

(58% of respondents said this service was important or very important)

Access to government services (federal, provincial and municipal), e.g. driver's license renewals, new business registration, municipal permits and applications

(58% of respondents said this service was important or very important)

Commercial Services

The following services were the top commercial services, that is, services for which people were willing to pay: (of those people who said access to these services was important or very important, two thirds said they would pay for access.)

Commercial services

- | | | |
|----|---|-----|
| 1. | Computer access to commercial library databases,
e.g. books in print, book reviews | 23% |
| 2. | Personal e-mail | 25% |
| 3. | Access to business, scientific and technical databases | 21% |
| 4. | Document delivery | 20% |
| 5. | Customized research | 18% |

What do you think the opportunity is for these types of services, that is, what do you think the demand would be?

Do you see your library offering these services as a revenue generating activity?

Do you see any barriers to setting up these types of services for a fee? e.g. Political, economic, staff, etc.

Membership Fee

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64% of all respondents said they would be willing to pay a small annual membership fee to get discounts on these types of services and other products offered through the library. (Generally, 20% of respondents said they would be willing to pay for these types of services directly.)

Do you see an opportunity for libraries to charge an annual membership fee to get discounts on these new electronic library services?

What would be the barriers, if any?

Advertising

Do you currently have any fee structure for people to advertise in the library, e.g. posting notices on the bulletin board, or hosting seminars which promote their services? Do you have any policies around this kind of advertising?

30% of respondents said they would advertise products or services on, for instance, a library website for a fee.

What barriers, if any, do you see for this were to happen?

What do you see as the opportunities?

6.4 Distribution of public consultation document

Consultation documents were distributed to libraries in the following locations:

Chief Executive Officer
Atikokan Library
Civic Centre
Atikokan, Ontario
P0T 1C0

Chief Executive Officer
Oxford County Library/Beachville Branch
4 Main Street East
Beachville, Ontario
N0T 1A0

Chief Executive Officer
Oxford County Library/Brownsville
Branch
15 Queen Street
Brownsville, Ontario

Chief Executive Officer
Oxford County Library/Burgessville
Branch
Main Street
Burgessville, Ontario

Chief Executive Officer
Cobalt Library
30 Lang Street
Cobalt, Ontario
P0I 1C0

Chief Executive Officer
Elgin County Library/Dutton Branch
236 Schackletown Street
Dutton, Ontario
N0I 1H0

Chief Executive Officer
East Oxford Library
R.R. #4
Woodstock, Ontario
N4S 7V8

Chief Executive Officer
Nakina Library
P.O. Box 300
Nakina, Ontario
P0T 2H0

Chief Executive Officer
Elgin County Library/Aylmer Branch
38 John Street South
Aylmer, Ontario
N5H 2C2

Chief Executive Officer
Elgin County Library/Belmont Branch
249 Main Street
Belmont, Ontario
N0I 1R0

Chief Executive Officer
Bruce Mines Library
Desbarats Street
Bruce Mines, Ontario
P0R 1C0

Chief Executive Officer
Chatham Library
120 Queen Street
Chatham, Ontario
N7M 2G5

Chief Executive Officer
Oxford County Library/Drumbo Branch
P.O. Box 69
Drumbo, Ontario
N0I 1G0

Chief Executive Officer
Ear Falls Library
50 Balsam Street
Ear Falls, Ontario
P0V 1T0

Chief Executive Officer
Oxford County Library/Embros Branch
Huron Street
Embros, Ontario
N0I 1H0

Chief Executive Officer
Oxford County Library/Otterville Branch
North Street
Otterville, Ontario
N0I 1R0

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Chief Executive Officer
Oxford County Library/Plattsville Branch
27 Albert Street
Plattsville, Ontario
N0I 1N0

Chief Executive Officer
Elgin County Library/Port Stanley Branch
302 Bridge Street
Port Stanley, Ontario
N5I 1C3

Chief Executive Officer
Elgin County Library/Shedden Branch
Hwy 3 at County Road #20
Shedden, Ontario
N0I 2E0

Chief Executive Officer
Sioux Lookout Library
21 5th Avenue
Sioux Lookout, Ontario
P8T 1B3

Chief Executive Officer
Sundridge Library
110 Main Street
Sundridge, Ontario
P0A 1Z0

Chief Executive Officer
Oxford County Library/Thamesford
Branch
165 Dundas Street
Thamesford, Ontario

Chief Executive Officer
Huron County Library/Wingham Branch
281 Edward Street
Wingham, Ontario
N0G 2W0

Chief Executive Officer
Kent County Library/Blenheim Branch
George Street
Blenheim Branch, Ontario
N7I 1C5

Chief Executive Officer
Bradford West-Gwillimbury Library
100 Holland Court
Bradford, Ontario
L3Z 2A7

Chief Executive Officer
Elgin County Library/Port Burwell Branch
29 Wellington Street
Port Burwell, Ontario
N0I 1T0

Chief Executive Officer
Oxford County Library/Princeton Branch
8 Victoria Street
Princeton, Ontario
N0I 1V0

Chief Executive Officer
Simcoe Library
46 Colborne Street
Simcoe, Ontario
N3Y 4H3

Chief Executive Officer
Elgin County Library/Springfield Branch
106 Main Street
Springfield, Ontario
N0I 2I0

Chief Executive Officer
Stratford Library
19 St. Andrew Street
Stratford, Ontario
N5A 1A2

Chief Executive Officer
Oxford County Library/Tavistock Branch
31 Maria Street
Tavistock, Ontario
M0B 2R0

Chief Executive Officer
Elgin County Library/West Lorne Branch
160 Main Street
West Lorne, Ontario
N0I 2P0

Chief Executive Officer
Beardmore* Library
185 Main Street
Beardmore*, Ontario
P0T 1G0

Chief Executive Officer
Kent County Library/Bothwell Branch
Main Street
Bothwell, Ontario
N7I 1C5

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Chief Executive Officer
Burford Library
120 King Street
Burford, Ontario
N0E 1A0

Chief Executive Officer
Coldwater Library
31 Coldwater Road
Coldwater, Ontario
L0K 1E0

Chief Executive Officer
Kent County Library/Dresden Branch
187 Brown Street
Dresden, Ontario
N0P 1M0

Chief Executive Officer
Elliot Lake Library
Algo Central Mall, 151 Ontario Avenue
Elliot Lake, Ontario
P5A 2T2

Chief Executive Officer
Huron County Library/Exeter Branch
330 main Street South
Exeter, Ontario
N0M 1S6

Chief Executive Officer
Huron County Library/Brussels Branch
Queen Street East, P.O. Box 80
Brussels, Ontario
N0G 1H0

Chief Executive Officer
Burk's Falls* Library
39 Copeland Street
Burk's Falls*, Ontario
P0A 1C0

Chief Executive Officer
Clearview* Library/Stayner Branch
201 Huron Street
Stayner, Ontario
L0M 1S0

Chief Executive Officer
Englehart Library
71 Fourth Avenue
Englehart, Ontario
P0I 1H0

Chief Executive Officer
Golden Balmertown Library
252 Fifth Street
Balmertown, Ontario
P0V 1C0

Virtual Library Inc.

Chief Executive Officer
Hagar Library
21 Main Street
Markstay, Ontario
P0M 2G0

Chief Executive Officer
Kent County Library/Highgate Branch
King Street
Highgate, Ontario
N0P 1T0

Chief Executive Officer
Iron Bridge Library
P.O. Box 339
Iron Bridge, Ontario
P0R 1H0

Chief Executive Officer
Longlac* Library
168 Kenogami Street
Longlac, Ontario
P0T 2A0

Chief Executive Officer
Moonbeam Library
53, rue St. Aubin / C.P. 370
Moonbeam, Ontario
P0L 1V0

Chief Executive Officer
Frontenac County Library/Kingston
Branch
130 Days Road
Kingston Ontario

Chief Executive Officer
Middlesex County Library/Parkhill
Branch
233 Main Street
Parkhill Ontario

Chief Executive Officer
Huron County Library/Hensall Branch
108 King Street,
Hensall, Ontario
N0M 1X0

Chief Executive Officer
Huron County Library/Kirkton Branch
Kirkton-Wooham Community Centre
Kirkton, Ontario
N0K 1K0

Chief Executive Officer
Middlesex County Library/Lobo Branch
11 St. John's Street
Arva, Ontario
N0M 1C0

Chief Executive Officer
Niagara-on-the-Lake Library
Rear, 26 Queen Street
Niagara-on-the-Lake*, Ontario
L0S 1J0

Chief Executive Officer
North Himsworth Library
30 Catherine Street
Callander, Ontario
P0H 1H0

Chief Executive Officer
Paris Library
12 William Street
Paris, Ontario
N3I 1K7

Chief Executive Officer
Frontenac County Library/Ompah Branch
Hwy 506
Ompah, Ontario
K0H 2J0

Chief Executive Officer
Kent County Library/Ridgetown Branch
54 Main Street West
Ridgetown, Ontario
N7I 1C5

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Chief Executive Officer
Springwater* Library
12 Finlay Mill Road
Midhurst, Ontario
L0L 1X0

Chief Executive Officer
St. Marys Library
15 Church Street North
St. Marys, Ontario
N4X 1R4

Chief Executive Officer
Thessalon Library
P.O. Box 549
Thessalon, Ontario
P0R 1L0

Chief Executive Officer
White River Library
123 Superior Street
White River, Ontario
P0M 3G0

Chief Executive Officer
South River* Library
3 Marie Street East
South River*, Ontario
P0A 1X0

Chief Executive Officer
St. Joseph Library
P.O. Box 187
Richards Landing, Ontario
P0R 1I0

Chief Executive Officer
Sturgeon Falls* Library
225 Holditch Street
Sturgeon Falls*, Ontario
P0H 2G0

Chief Executive Officer
Kent County Library/Tilbury Branch
2 Queen Street
Tilbury, Ontario
N0P 2L0

Chief Executive Officer
Middlesex County Library/West Nissouri
Branch
R.R.#3
Thorndale, Ontario

Chief Executive Officer
Kent County Library/Wheatley Branch
35 Talbot Street West
Wheatley, Ontario
N0P 2P0

Chief Executive Officer
Huron County Library/Zurich Branch
22 Main Street
Zurich, Ontario
N0M 2T0

Chief Executive Officer
Middlesex County Library/Alisa Craig Branch
160 Main Street
Alisa Craig, Ontario
N0M 1A0

Virtual Library Inc.

Chief Executive Officer
Huron County Library/Bayfield Branch
Main Street, P.O. Box 2090
Bayfield, Ontario
N0M 1G0

Chief Executive Officer
Middlesex County Library/Glencoe
Branch
178 McKellar Street
Glencoe, Ontario

Chief Executive Officer
Oxford County Library/Hickson Branch
85 Loveys Street
Hickson, Ontario
N0I 1L0

Chief Executive Officer
Oxford County Library/Innerkip Branch
R.R.1
Innerkip, Ontario
N0I 1M0

Chief Executive Officer
Manitouwadge Library
Community Centre, Manitou Road
Manitouwadge, Ontario
P0T 2C0

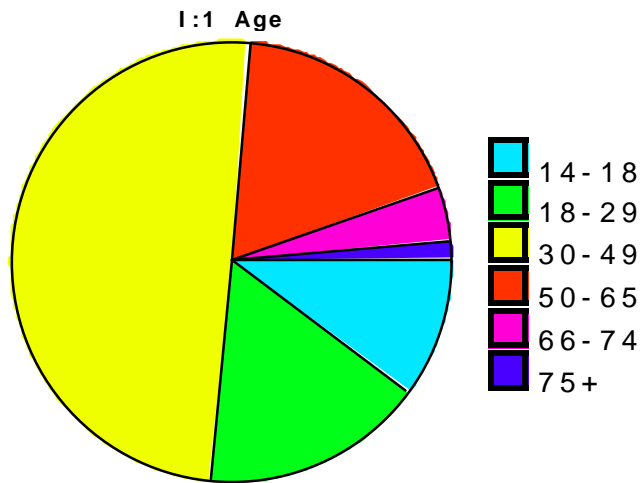
Chief Executive Officer
Athens Library
Main Street
Athens, Ontario
K0F 1R0

Chief Executive Officer
Huron County Library/Goderich Branch
52 Montreal Street
Goderich, Ontario
N7A 3G4

Chief Executive Officer
Oxford County Library/Kintore Branch
Main Street
Kintore, Ontario
M0M 2C0

Chief Executive Officer
Oxford County Library/Mount Elgin Branch
Main Street
Mount Elgin, Ontario
N0I 1N0

6.5 Demographic information



PI: Age

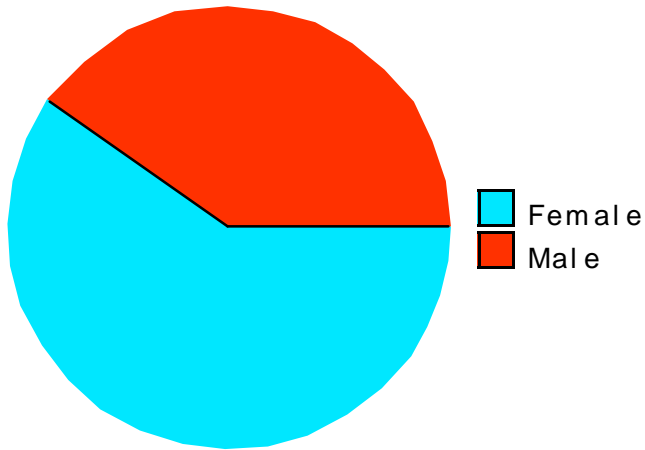
1337 total cases of which 5 are missing

Total Cases 1332

Group	Count	%
14-18	136	10.210
18-29	219	16.441
30-49	664	49.850
50-65	243	18.243
66-74	53	3.979
75+	17	1.276

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1 : 2 Gender

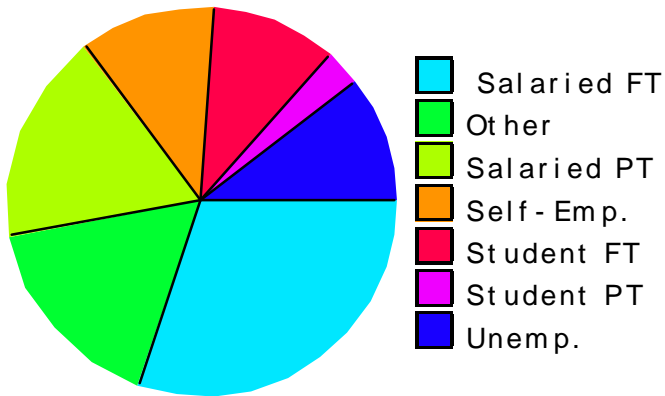


PI:2 Gender

Total Cases 1337

Group	Count	%
Female	800	59.835
Male	537	40.165

1 : 3 Occupation



PI:3 Occupation

1337 total cases of which 17 are missing

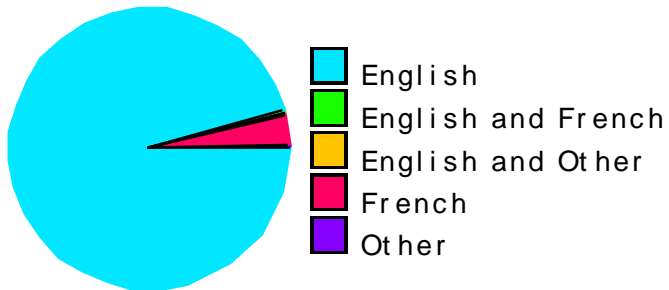
Total Cases 1320

Group	Count	%
Salaried FT	398	30.152
Salaried PT	233	17.652

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Self-Emp.	149	11.288
Student FT	141	10.682
Student PT	37	2.803
Unemp.	139	10.530
Other	223	16.894

I:4 Language



PI:4 Language

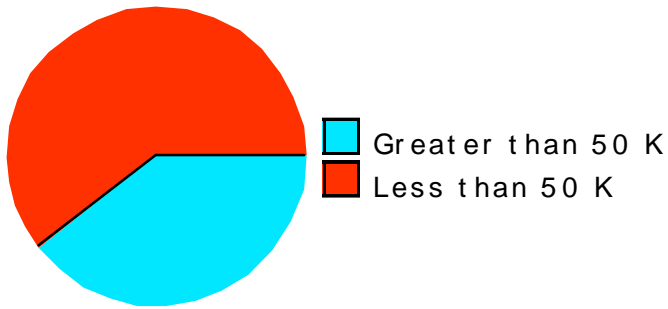
1337 total cases of which 3 are missing

Total Cases 1334

Group	Count	%
English	1275	95.577
English and French	4	0.300
English and Other	4	0.300
French	45	3.373
Other	6	0.450

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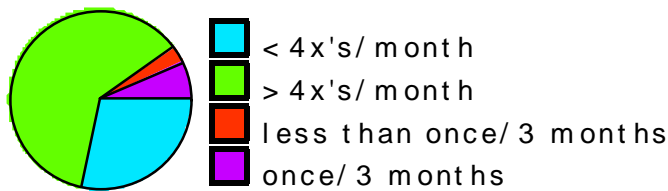
I:5 Community Size



PI:5 Community Size (Population)
1337 total cases of which 3 are missing
Total Cases 1334

Group	Count	%
Greater than 50,000	527	39.505
Less than 50,000	807	60.495

6 Library Usage



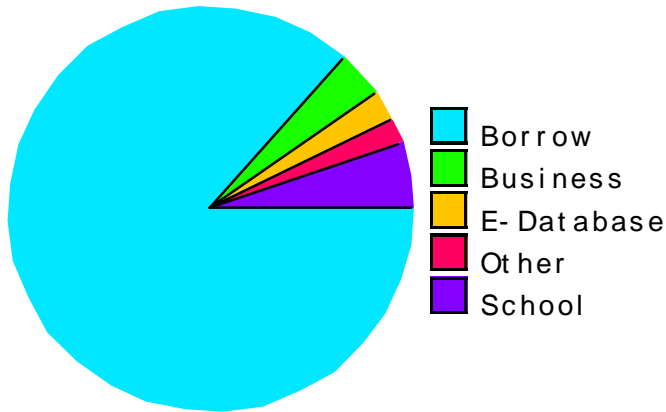
PI:6 Library Usage
1337 total cases of which 9 are missing
Total Cases 1328

Group	Count	%
> Greater than 4x's/month	820	61.747

Virtual Library Inc.

< Less than 4x's/month	378	28.464
less than once/3 months	43	3.238
once/3 months	87	6.551

7 : Lib Use

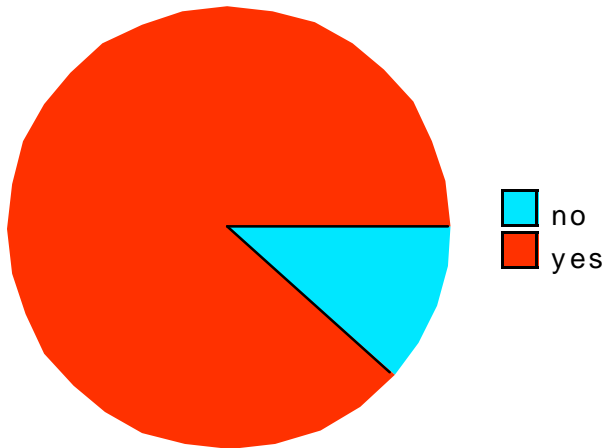


PI:7 Use Library For
 1337 total cases of which 9 are missing
 Total Cases 1328
 Number of Categories 5

Group	Count	%
Borrow	1151	86.672
Business	49	3.690
E-Database	31	2.334
Other	27	2.033
School	70	5.271

Virtual Library Inc.

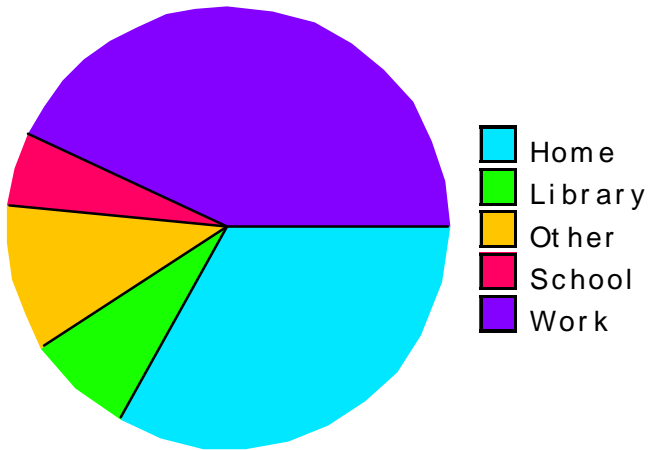
P 1 :8



PI:8 Computer Use
 Total Cases 1337
 Number of Categories 2

Group	Count	%
yes	1180	88.257
no	157	11.743

Use Comp Where

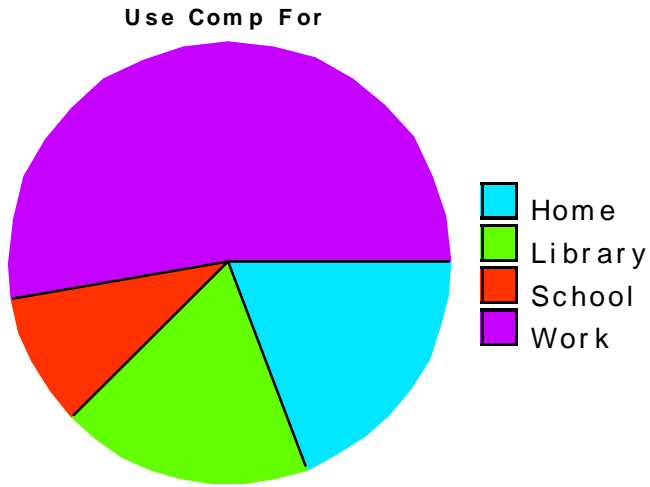


PI:9 Computer Use by Location
 1337 total cases of which 22 are missing
 Total Cases 1315
 Number of Categories 5

Group	Count	%
Home	157	11.743
Library	22	1.653
Other	118	8.836
School	22	1.653
Work	1058	80.015

Virtual Library Inc.

Work	565	42.966
Home	435	33.080
Library	103	7.833
School	70	5.323
Other	142	10.798



PI:10 Computer Use by Purpose

1337 total cases of which 25 are missing

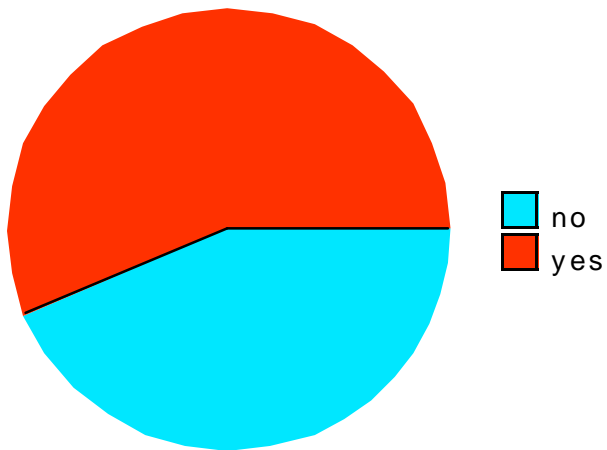
Total Cases 1312

Number of Categories 4

Group	Count	%
Work	693	52.820
Home	251	19.131
Library	242	18.445
School	126	9.604

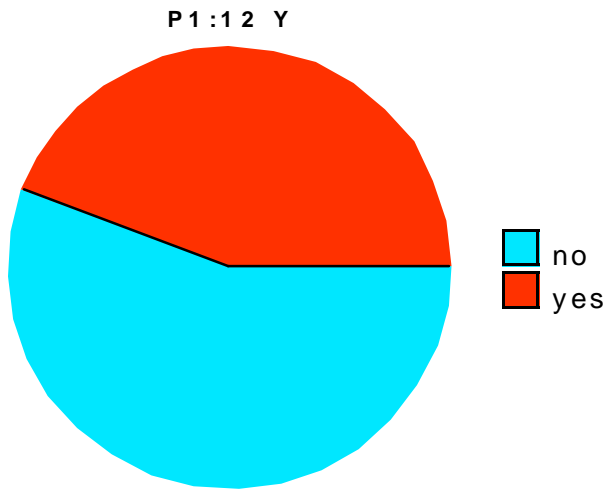
Virtual Library Inc.

P1:11 Y



PI:11 Access to Online Services
1337 total cases of which 1 is missing
Total Cases 1336
Number of Categories 2

Group	Count	%
no	581	43.488
yes	755	56.512



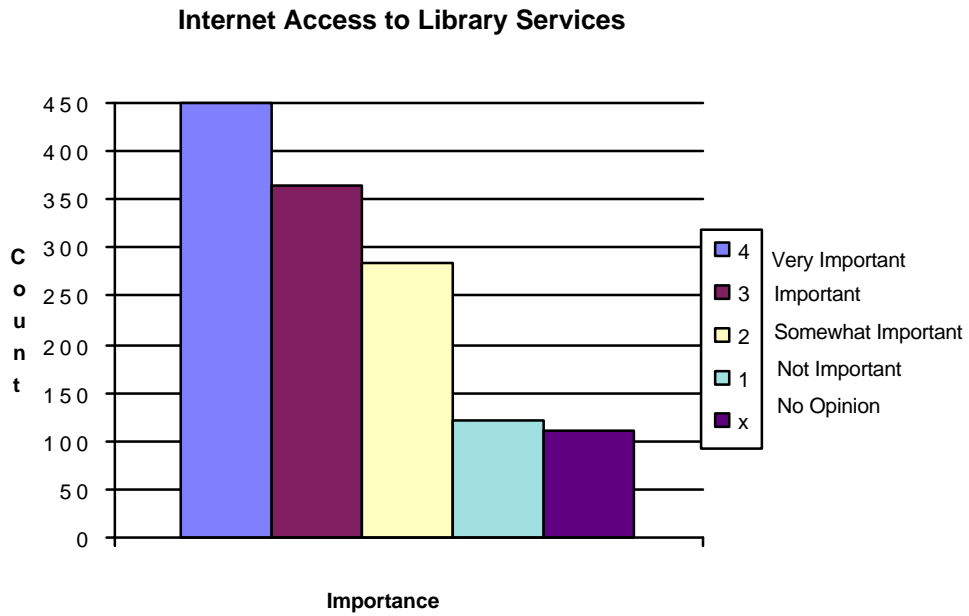
PI:12 Training Required to Use the Internet

Total Cases 1337

Number of Categories 2

Group	Count	%
yes	590	44.129
no	747	55.871

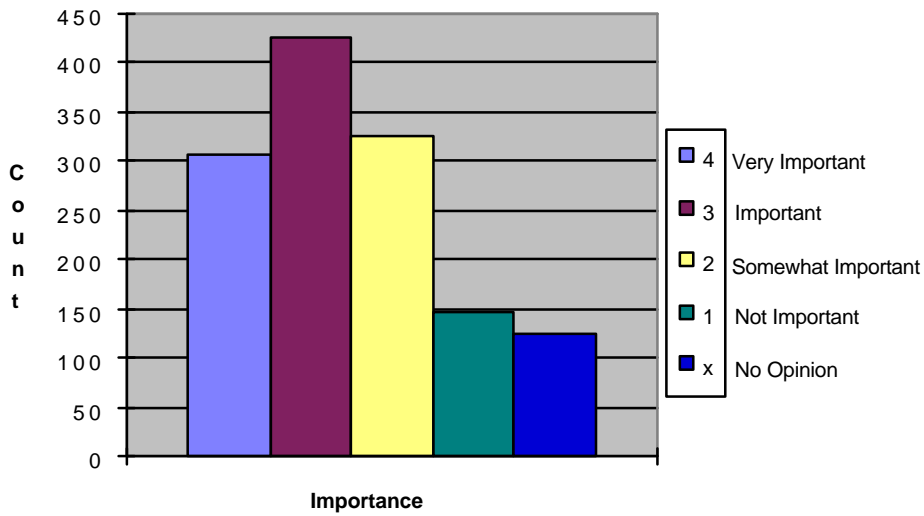
6.6 Levels of demand for services



II:13 Internet Access to Library Services
 1337 total cases of which 6 are missing
 Total Cases 1331

Group	Count	%
4	450	33.809
3	364	27.348
2	284	21.337
1	122	9.166
x	111	8.340

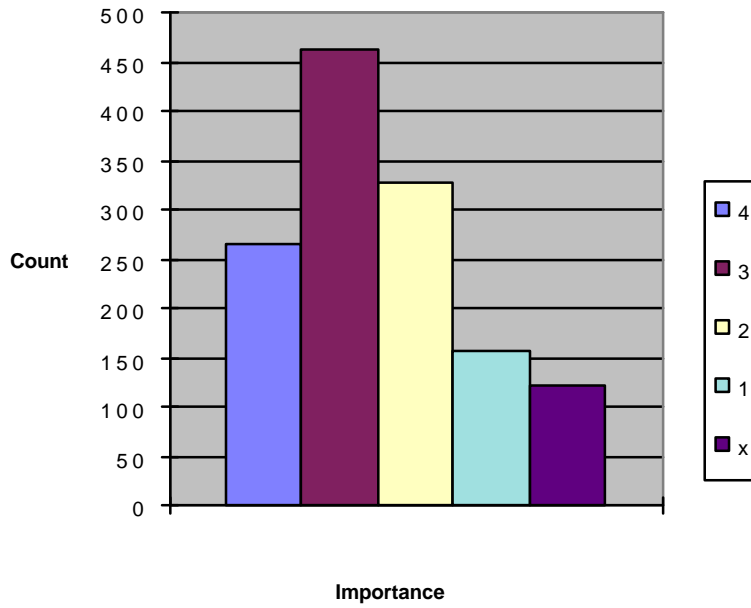
Internet Access to Community Directory



PII:14a Directory Services
 1337 total cases of which 8 are missing
 Total Cases 1329

Group	Count	%
4	305	22.950
3	425	31.979
2	326	24.530
1	147	11.061
x	126	9.481

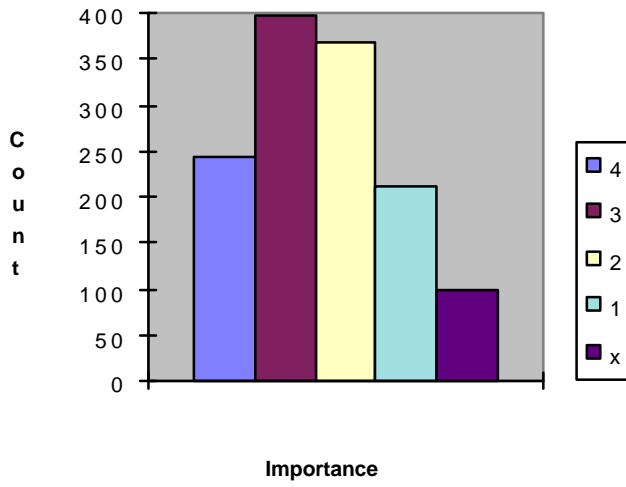
Internet Access to Detailed Community Directory



PII:14b Detailed Directory Services
 1337 total cases of which 5 are missing
 Total Cases 1332

Group	Count	%
4	264	19.820
3	463	34.760
2	328	24.625
1	156	11.712
x	121	9.084

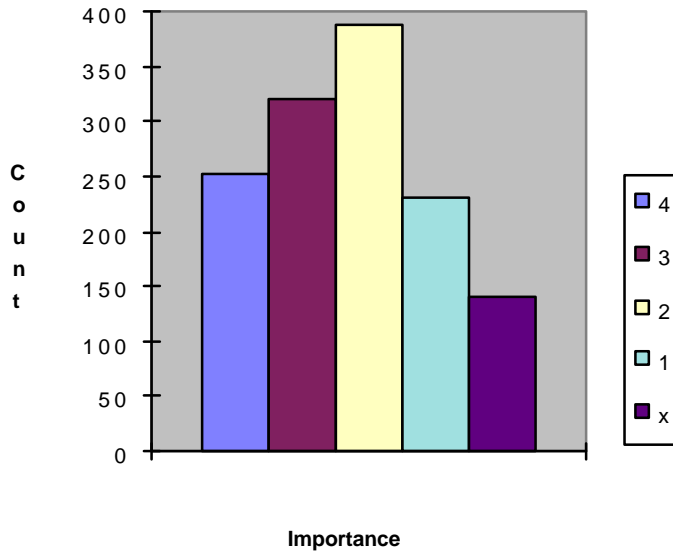
Internet Access to Listings of Community Events



PII:14c Community Events
 1337 total cases of which 19 are missing
 Total Cases 1318

Group	Count	%
4	243	18.437
3	397	30.121
2	368	27.921
1	211	16.009
x	99	7.511

Internet Access to Volunteer Job Listings



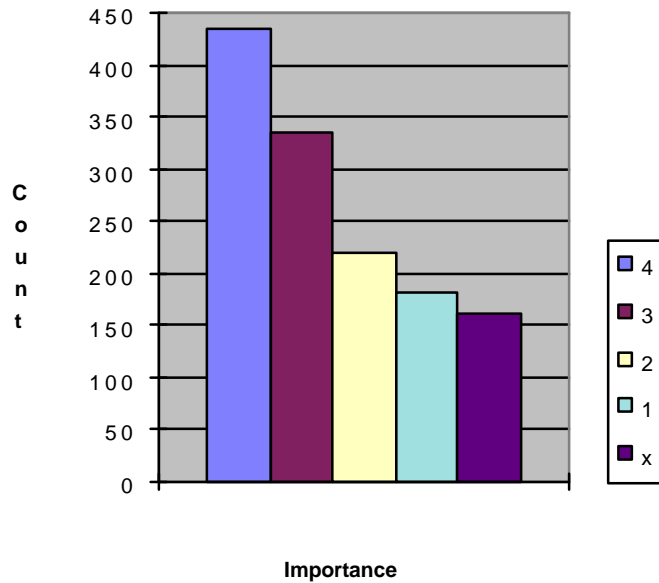
PII:14d Volunteer Jobs

1337 total cases of which 6 are missing

Total Cases 1331

Group	Count	%
4	253	19.008
3	319	23.967
2	388	29.151
1	231	17.355
x	140	10.518

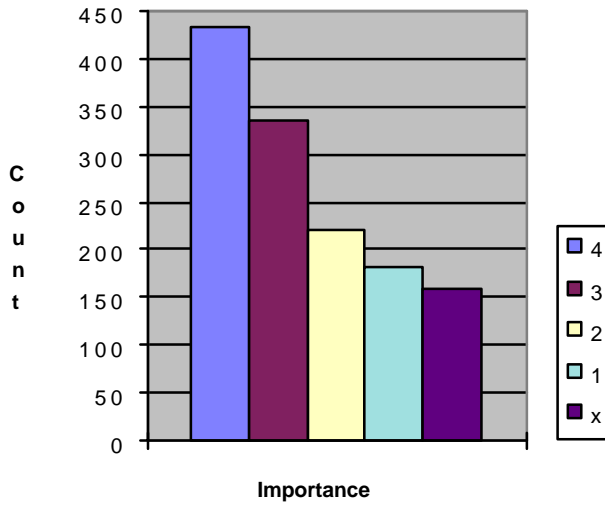
Internet Access to Local Job Opportunities



PII:14e Local Job Opportunities
 1337 total cases of which 6 are missing
 Total Cases 1331

Group	Count	%
4	434	32.607
3	336	25.244
2	220	16.529
1	181	13.599
x	160	12.021

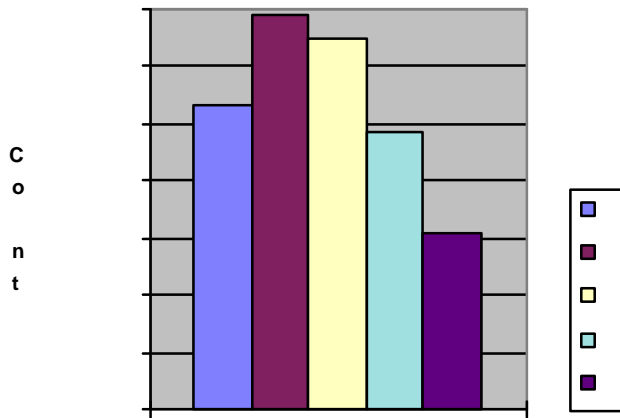
Internet Access to Medically Approved Health Information



PII:14f Medically Approved Health Information
 1337 total cases of which 6 are missing
 Total Cases 1331

Group	Count	%
4	434	32.607
3	336	25.244
2	220	16.529
1	181	13.599
x	160	12.021

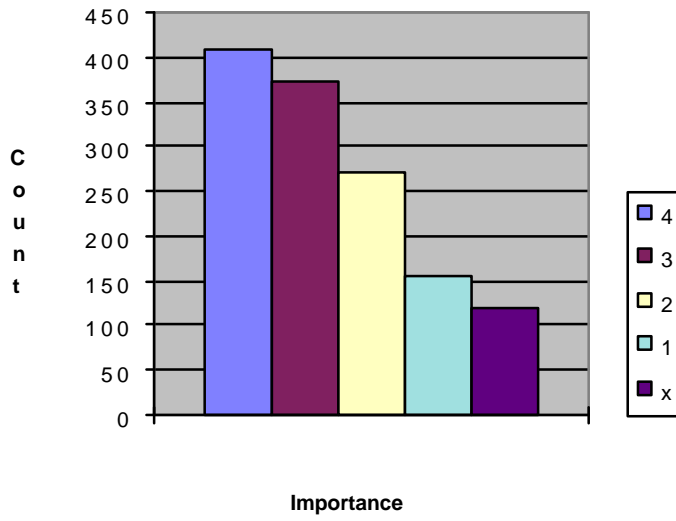
**Registration for Recreation Programs via
the Internet**



1337 total cases of which 6 are missing
Total Cases

Group	%
4	19.985
3	25.920
2	24.418
1	18.182
x	11.495

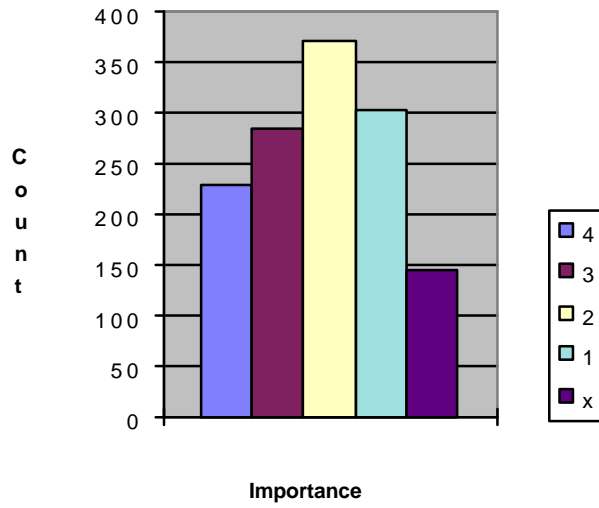
Distance Learning via the Internet



PII:15a Distance Learning
 1337 total cases of which 7 are missing
 Total Cases 1330

Group	Count	%
4	409	30.752
3	374	28.120
2	272	20.451
1	155	11.654
x	120	9.023

Internet Chat/Discussion Groups for Small Business



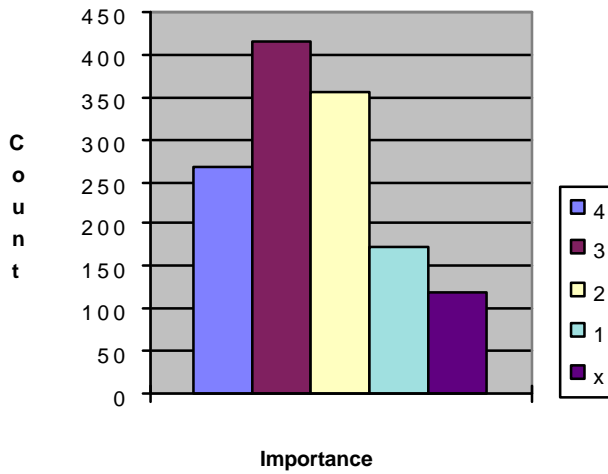
PII:15b Chat/Discussion Groups for Small Business

1337 total cases of which 6 are missing

Total Cases 1331

Group	Count	%
4	229	17.205
3	284	21.337
2	370	27.799
1	302	22.690
x	146	10.969

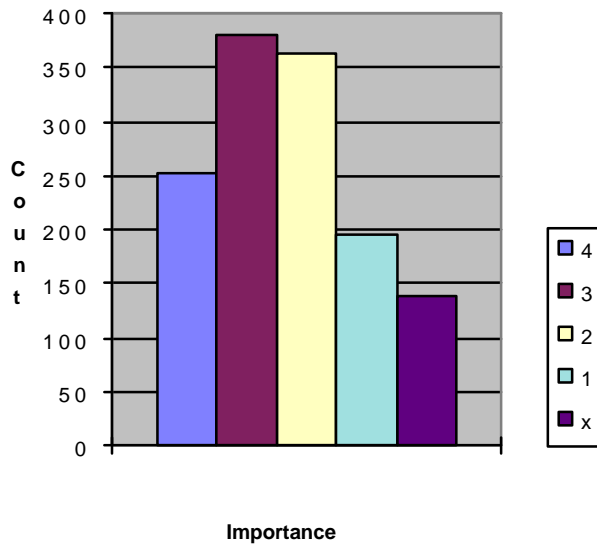
Local Seminars, Workshops Listed on the Internet



PII:15c Local Seminars, Workshops
 1337 total cases of which 7 are missing
 Total Cases 1330

Group	Count	%
4	268	20.150
3	414	31.128
2	355	26.692
1	174	13.083
x	119	8.947

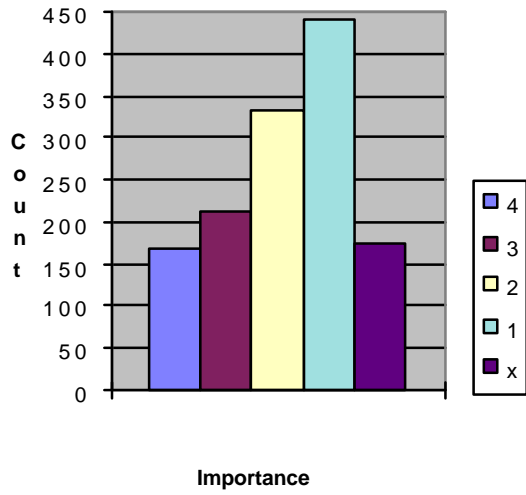
Internet Publishing of New Authors Works



PII:15d New Author Publishing
 1337 total cases of which 8 are missing
 Total Cases 1329

Group	Count	%
4	251	18.886
3	380	28.593
2	364	27.389
1	196	14.748
x	138	10.384

Direct Purchasing via the Internet



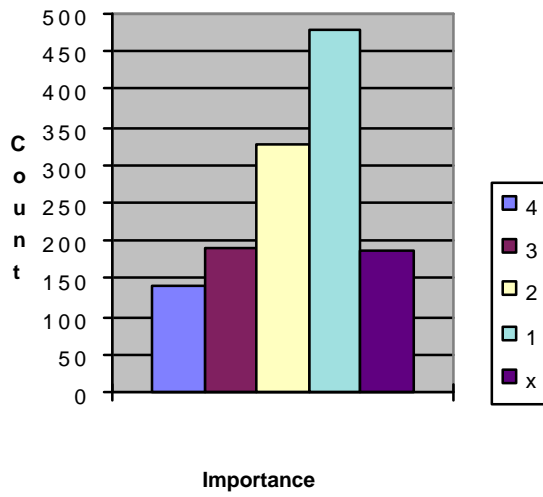
PII:15e Retail Services

1337 total cases of which 8 are missing

Total Cases 1329

Group	Count	%
4	169	12.716
3	213	16.027
2	332	24.981
1	440	33.108
x	175	13.168

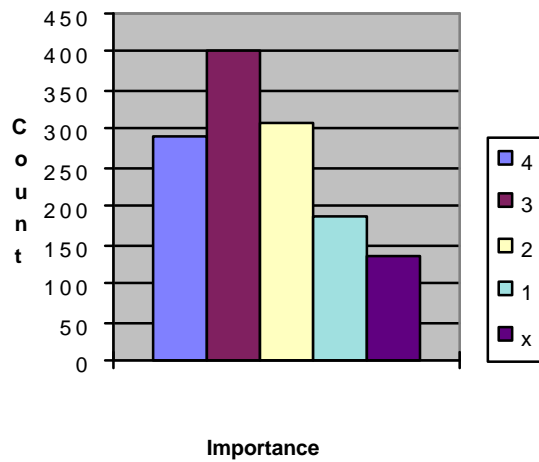
Catalogue Shopping via the Internet



PII:15f Catalogue Shopping via the Internet
 1337 total cases of which 11 are missing
 Total Cases 1326

Group	Count	%
4	142	10.709
3	191	14.404
2	327	24.661
1	478	36.048
x	188	14.178

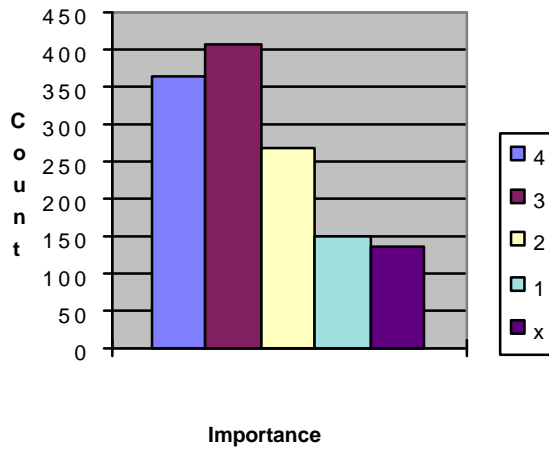
Access to Government Publications via the Internet



PII:16 Government Publications
 1337 total cases of which 9 are missing
 Total Cases 1328

Group	Count	%
4	292	21.988
3	403	30.346
2	309	23.268
1	188	14.157
x	136	10.241

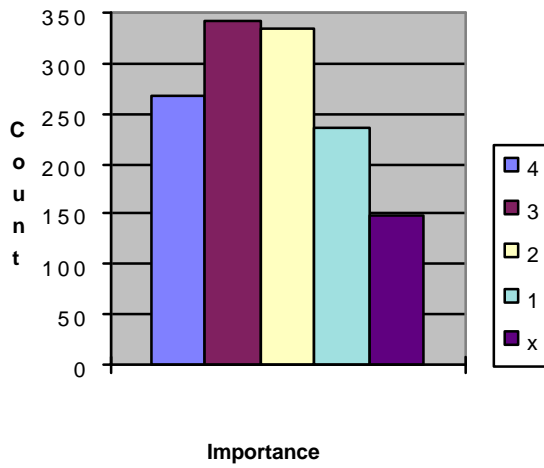
Access to Government Services via the Internet



PII:16b Access to Government Services
 1337 total cases of which 9 are missing
 Total Cases 1328

Group	Count	%
4	366	27.560
3	407	30.648
2	269	20.256
1	149	11.220
x	137	10.316

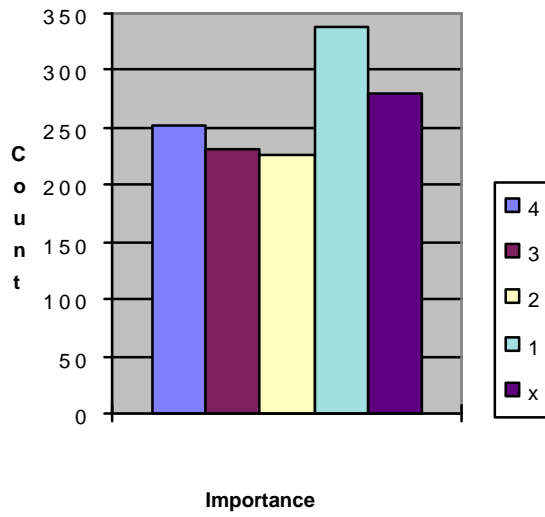
Access to Municipal Documents via the Internet



PII:16c Access to Municipal Documents
 1337 total cases of which 11 are missing
 Total Cases 1326

Group	Count	%
4	267	20.136
3	341	25.716
2	333	25.113
1	237	17.873
x	148	11.161

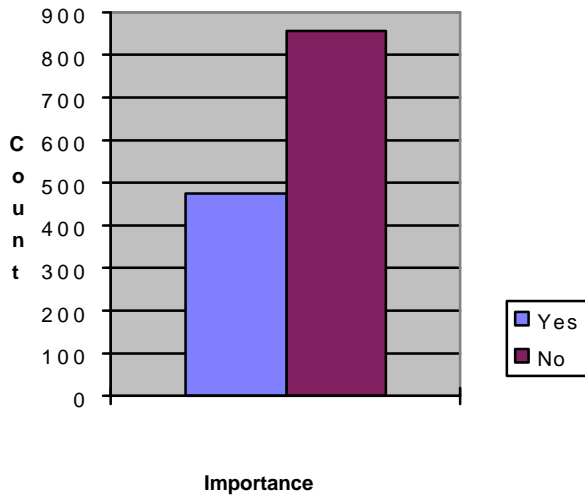
Access to E-Mail via CAP/Library PC



P3 : 17a Personal E-Mail via CAP/Library PC
 1337 total cases of which 10 are missing
 Total Cases 1327

Group	Count	%
4	251	18.915
3	230	17.332
2	226	17.031
1	339	25.546
x	281	21.176

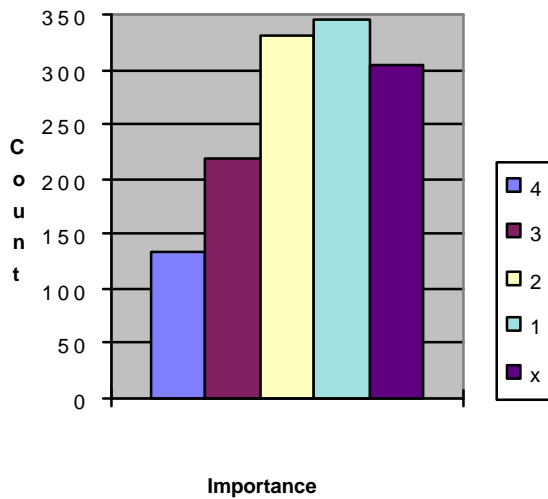
Willing to Pay for E-Mail Access



P3:17a Payment for E-Mail Access
 1337 total cases of which 10 are missing
 Total Cases 1327

Group	Count	%
Yes	473	35.644
No	854	64.356

In-Depth Custom Research



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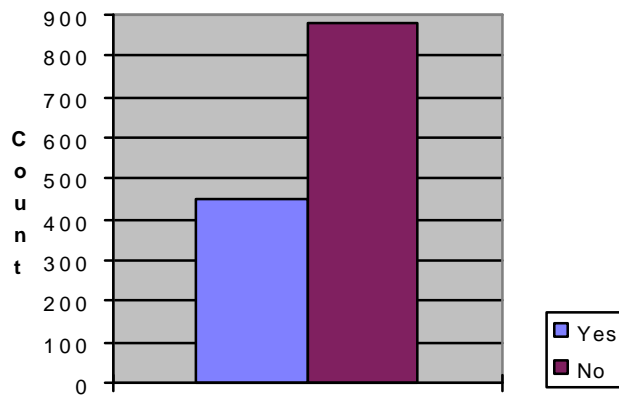
P3:17b In-Depth Custom Research

1337 total cases of which 9 are missing

Total Cases 1328

Group	Count	%
4	133	10.015
3	218	16.416
2	330	24.849
1	344	25.904
x	303	22.816

Pay for Custom Research



Willing to Pay

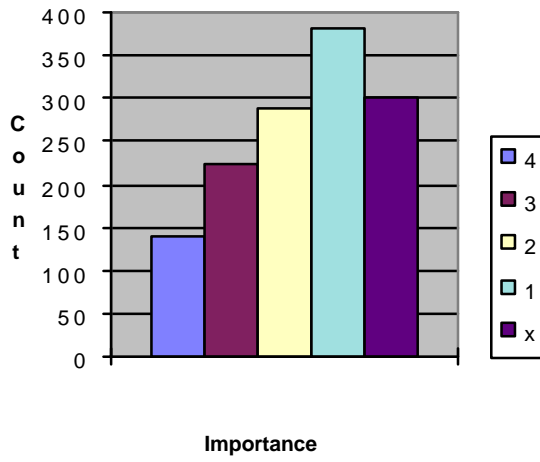
P3:17b Pay for Research Y/N

1337 total cases of which 9 are missing

Total Cases 1328

Group	Count	%
Yes	448	33.735
No	880	66.265

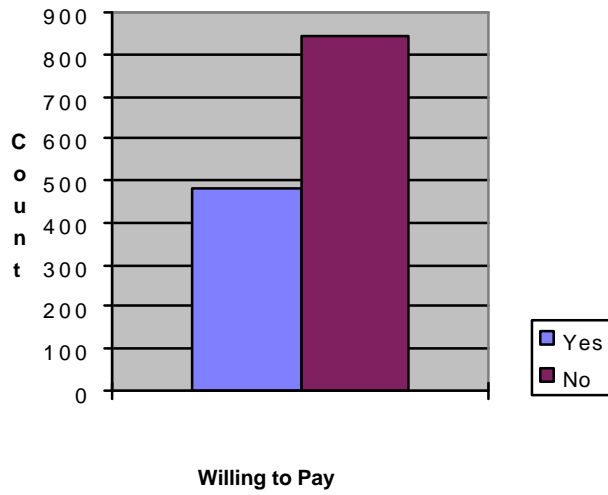
Delivery of Documents Requested via the Internet



P3:17c Delivery of Documents
 1337 total cases of which 8 are missing
 Total Cases 1329

Group	Count	%
4	138	10.384
3	222	16.704
2	287	21.595
1	382	28.743
x	300	22.573

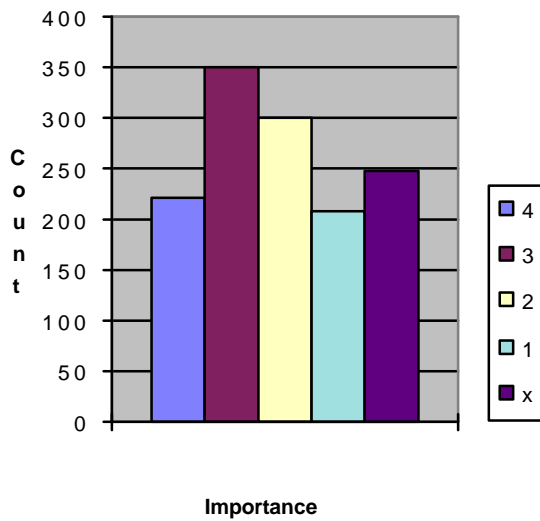
Payment for Document Delivery



P3:17c Paying for Document Delivery
 1337 total cases of which 12 are missing
 Total Cases 1325

Group	Count	%
Yes	481	36.302
No	844	63.698

Access to Commercial Library Databases



Virtual Library Inc.

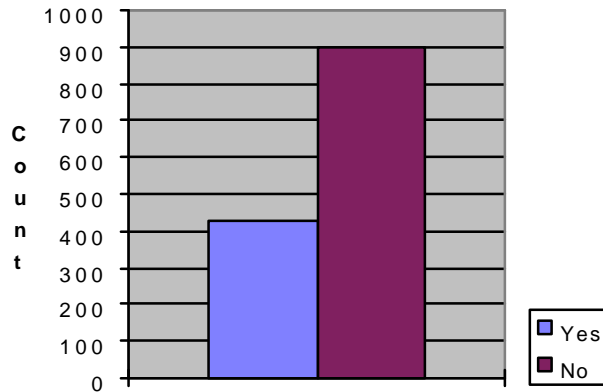
17d: Library Databases

1337 total cases of which 11 are missing

Total Cases 1326

Group	Count	%
4	220	16.591
3	351	26.471
2	300	22.624
1	207	15.611
x	248	18.703

Payment for Library Database Access



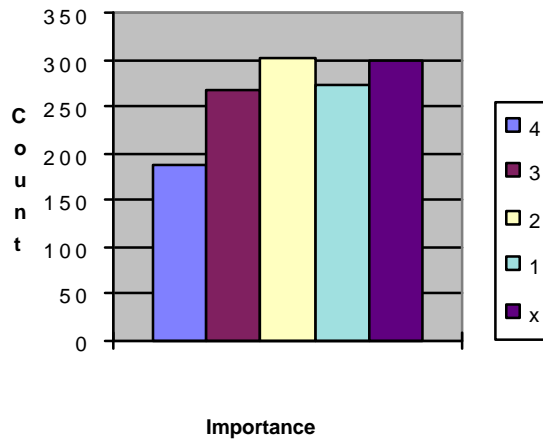
17d Pay for Access to Library Databases

1337 total cases of which 11 are missing

Total Cases 1326

Group	Count	%
Yes	424	31.976
No	902	68.024

**Access to Business/Scientific/Technical
Databases**



17e: Access to Business/Scientific/Technical Databases
 1337 total cases of which 10 are missing
 Total Cases 1327

Group	Count	%
4	188	14.167
3	267	20.121
2	301	22.683
1	273	20.573
x	298	22.457

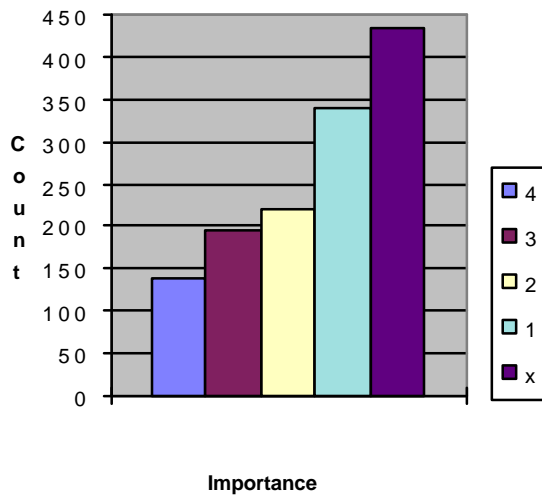
**Payment for Access to
Business/Scientific/Technical Databases**



17e:Payment for Access to Scientific/Business Databases
1337 total cases of which 10 are missing
Total Cases 1327

Group	Count	%
Yes	412	31.047
No	915	68.953

Advertising on the Internet



Virtual Library Inc.

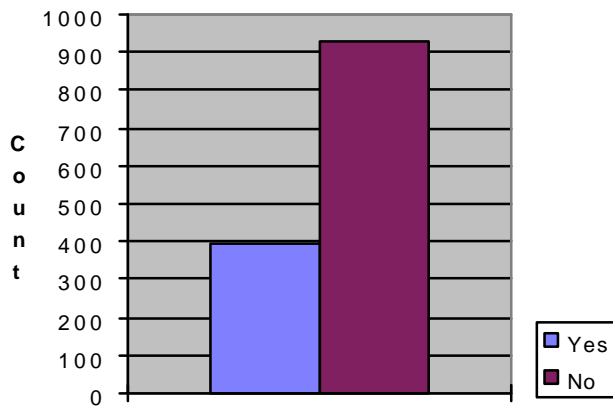
18: Advertising on the Internet

1337 total cases of which 10 are missing

Total Cases 1327

Group	Count	%
4	140	10.550
3	194	14.619
2	219	16.503
1	340	25.622
x	434	32.705

Payment for Advertising



Willing to Pay

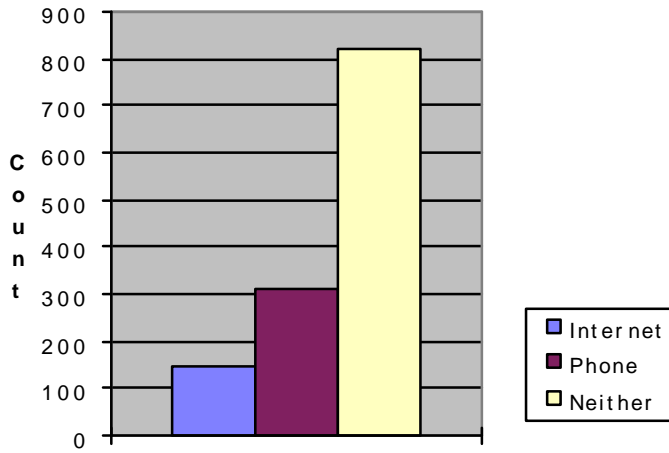
Frequency breakdown of 18:Y/N

1337 total cases of which 16 are missing

Total Cases 1321

Group	Count	%
Yes	391	29.599
No	930	70.401

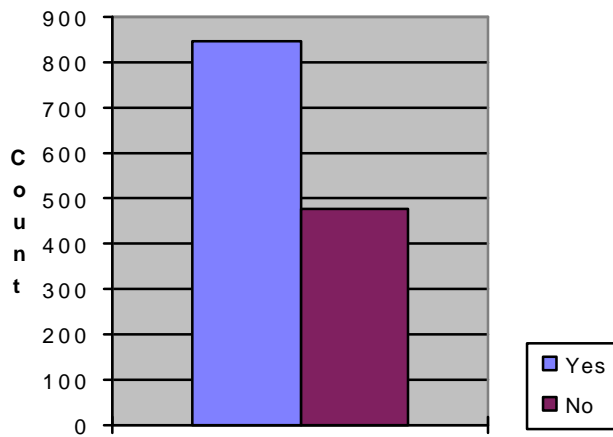
Methods of Payment



19: Method of Payment
 1337 total cases of which 55 are missing
 Total Cases 1282

Group	Count	%
Internet	149	11.622
Phone	310	24.181
Neither	823	64.197

Pay a Membership Fee



Willing to Pay

Virtual Library Inc.

20: Pay a Membership Fee

1337 total cases of which 11 are missing

Total Cases 1326

Group	Count	%
Yes	850	64.10 3
No	476	35.89 7