Libraries Connected Activity Survey July 2021

Summary:

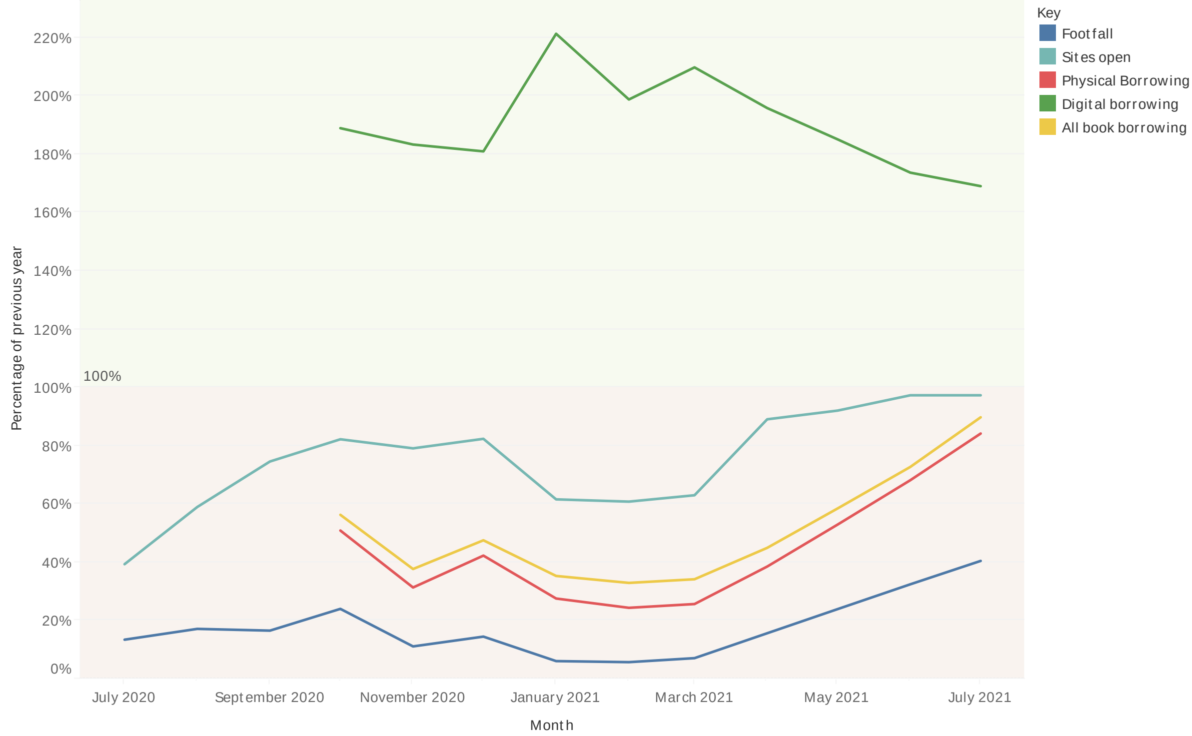
Footfall in July up to 40% of pre-covid, and borrowing is back up to 90% of precovid levels – with restrictions still in place . Physical borrowing is 84% - which shows significant rebound as there were concerns it would not recover – it would now be unsurprising to see a full return to physical borrowing levels in August / September.

Increased digital lending is increasing costs for 'reading books'. The shift in audio books from physical to digital has been extremely rapid – going from 50% digital to 84% digital over the past two years, and overall audiobook lending is up 40% on pre-covid levels.

Events have shifted back to physical events rather than online – it remains to be seen how online events can be managed and resourced while physical events return.

1 Footfall and numbers of sites open

Footfall and activity



This graph shows the activity levels as a percentage of the baseline figures for the following measures:

- Footfall in library sites
- Number of sites open (baseline = all sites open)
- Physical books borrowed
- eBooks borrowed

The levels are calculated against individual baselines for each library service set at the average levels between October 2019 to February 2020. This is not a perfect measure as it doesn't take into account seasonal variation, and for some library services it may be based on one or two responses in that timeframe – but it is the most effective measure with the data we have.

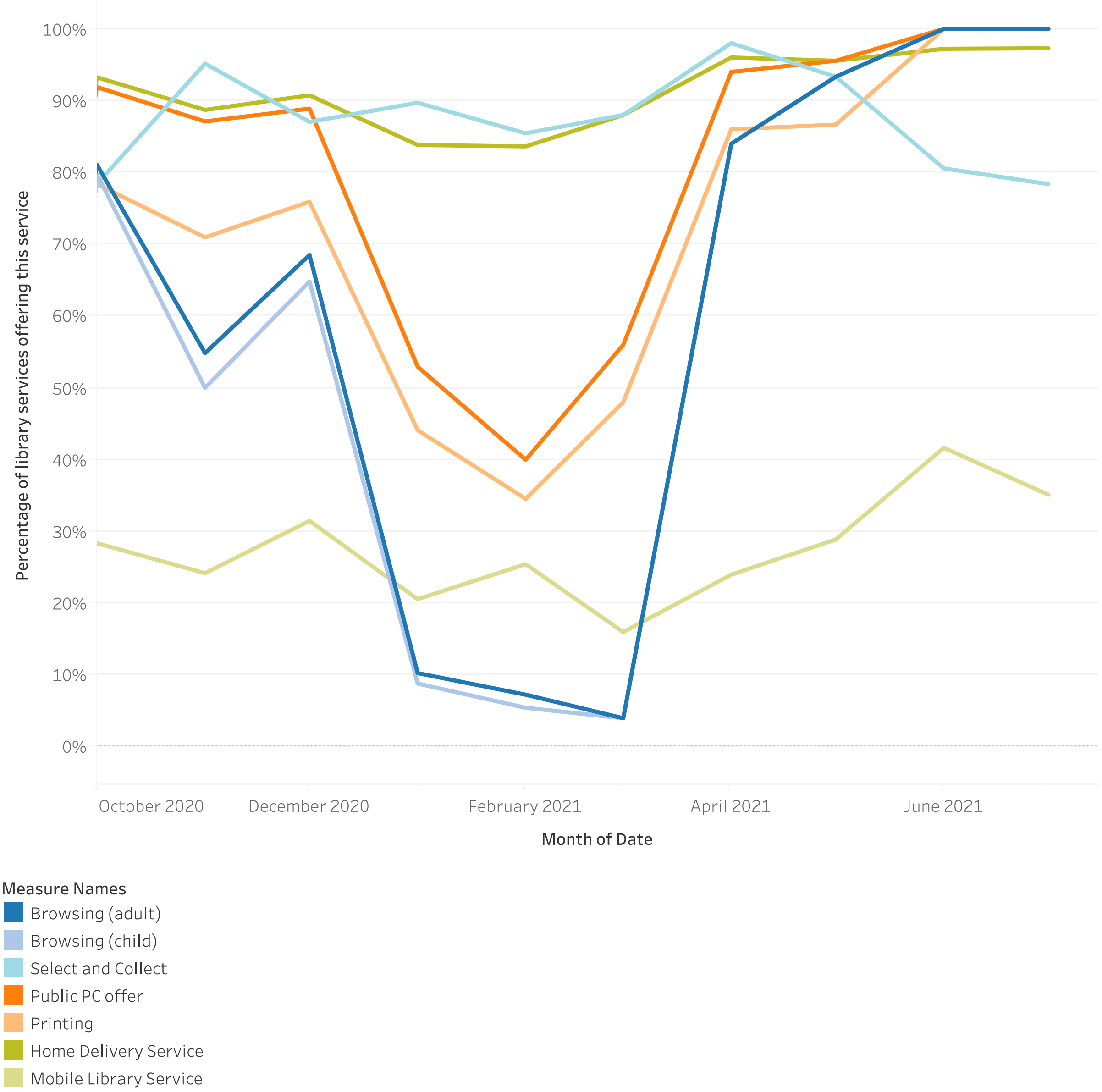
We can see from the graph:

- Significant reopening of sites following April 12th
- Physical footfall increasing to 40% of baseline in July 2021
- Return to 84% of physical borrowing levels, and total (non-audio) borrowing at 90% of pre-covid levels.
- Ebook borrowing remains high at 169% of pre-covid levels.

It is gratifying to see that physical book borrowing is returning to these levels – 84% of pre-covid baselines in July when there were still significant restrictions through most of the month.

2 Access to services

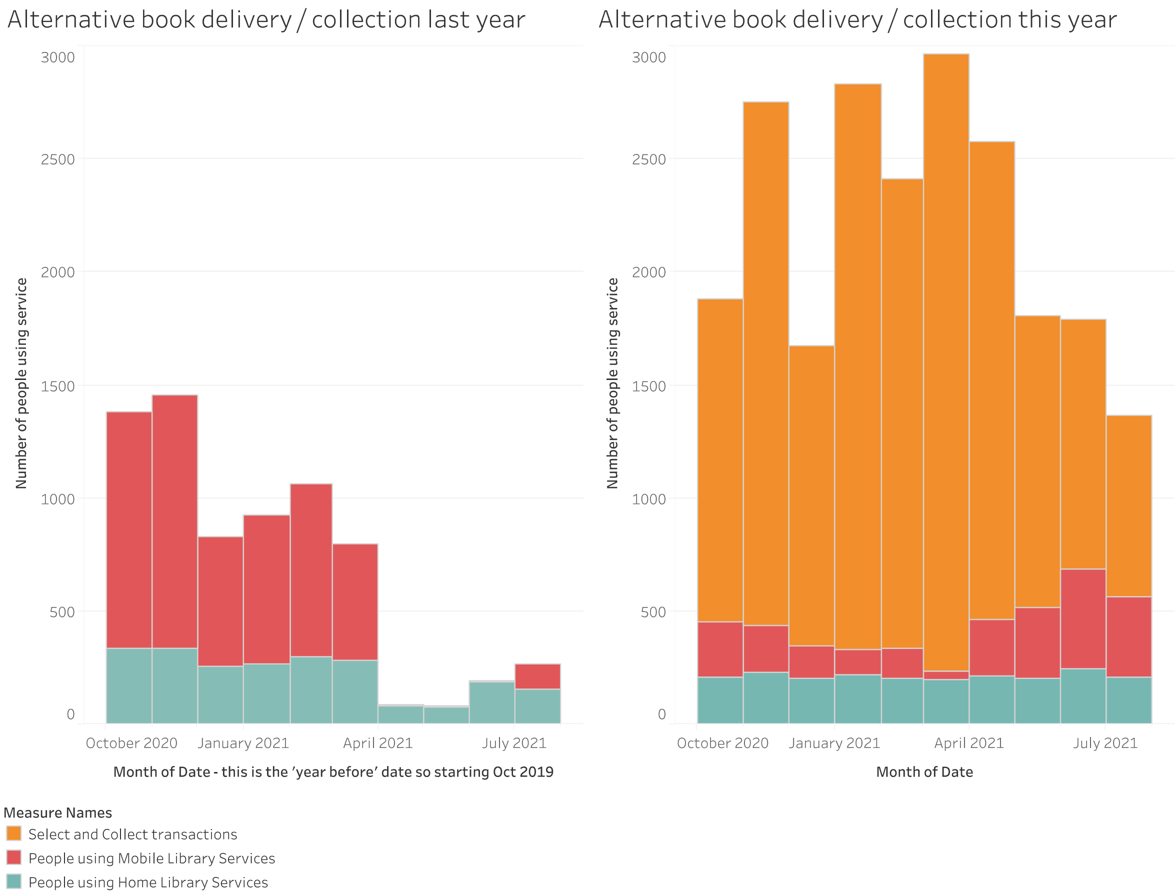
Books and PC Access



The range of services offered is essentially fully open again now, with browsing, public PCs, printing and home delivery available in all, or almost all, library services.

Select and collected services are dropping slightly – with some library services ending that channel of delivery now browsing is available. It may be that some services maintain this as a permanent change to their offer.

In terms of the total profile of 'non-browsing' book collections we can see that in October 2019 to July 2020 Select and Collect wasn't captured (though some services did introduce it from April 2020). Home library services have remained relatively constant through the pandemic period, while use of Mobile library services has fluctuated – and overall fallen. Whether this reduction in mobile library services is down to the increasing range of alternatives (including digital borrowing) or reductions in availability of these services meaning people find alternatives or go elsewhere.



The numbers here are relatively low compared to the overall borrowing total – even the peak of 3,000 people (average per library service) using these services compares with around 100,000 books borrowed (average per library service) so likely represents around 10% of borrowing assuming around 3 books per transaction – or less than half of this without select and collect.

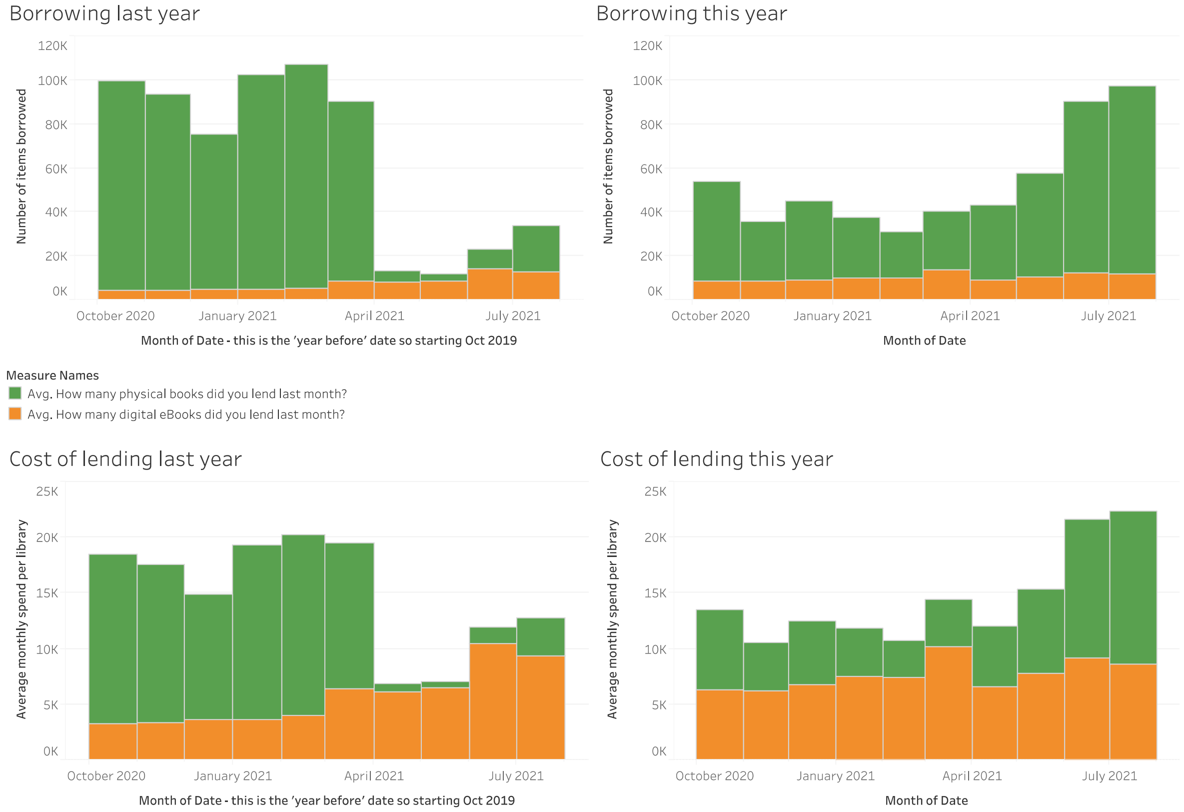
However it is likely that as more options become available, those library members still using these services are those who cannot access others, whether because the mobile library / Home Delivery service meets other needs around isolation, or they are not comfortable returning to public spaces, or they do not have access to the technology or skills to move to digital lending. So while mobile libraries may be reaching fewer people, it may be that the people they are still reaching are those it benefits the most.

3 Borrowing

3.1 'Reading book' borrowing

While borrowing of books (this section doesn't consider physical or digital audiobooks) has been supressed significantly over the periods of restriction, we have seen significant rebound over June and July 2021, as restrictions have lifted.

This has brought us up to 84% of pre-covid levels in July – when significant restrictions have still been in place.



We are starting to see clearly now the steady increase of digital borrowing as a proportion of all books lent. Moving through October 2020 to April 2021, we see digital books and audiobooks rising to almost half of all borrowing. However, as we can see from the 'last year' figures, the numbers of ebooks lent increased steadily through October 2019 to February 2020, so the increase in digital borrowing looks to be an acceleration of this long term trend rather than an entirely new phenomenon.

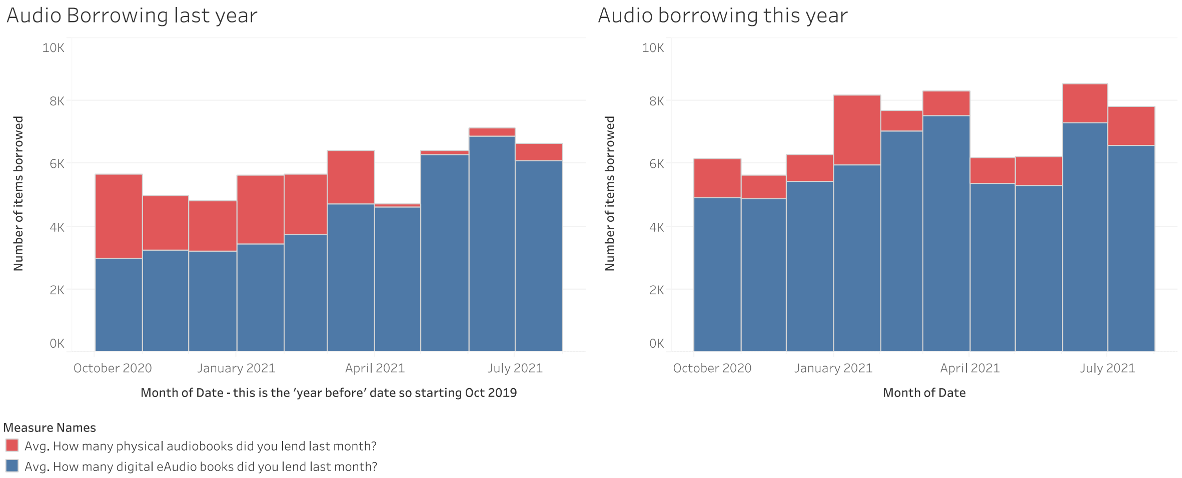
This does appear to have stabilised, and the lower graphs show the impact of this on the libraries' 'Cost of lending'. Due to the higher cost per loan of digital content, the monthly cost of lending for an average library has increased to around 110% of pre-covid levels when the volume of lending has only reached 90%.

Should total lending reach – or exceed – pre-Covid baselines this will further increase the additional costs of lending. In the context of reduced library budgets this presents a significant risk – 25% of libraries are experiencing a 10-20% budget reduction this financial year, and the majority of the others have had budgets rolled over with the expectation of reductions next year.

3.2 Audio book borrowing

Audio book borrowing has increased as a whole over the past 2 years with June and July 2021 averaging around 30-40% more audio book loans than the pre-covid baseline.

Looking at the split between physical and digital audio lending, the pre-covid picture is that of a clear shift to digital – and this has accelerated over the pandemic, with physical lending halved in June / July 2021 while digital audio lending has doubled.



This may have implications for those who still rely on physical media, and it is worth noting some library services are purchasing Daisy players and similar devices that can provide access to audio books to those who either do not have access to digital technology or where there are barriers to accessibility.

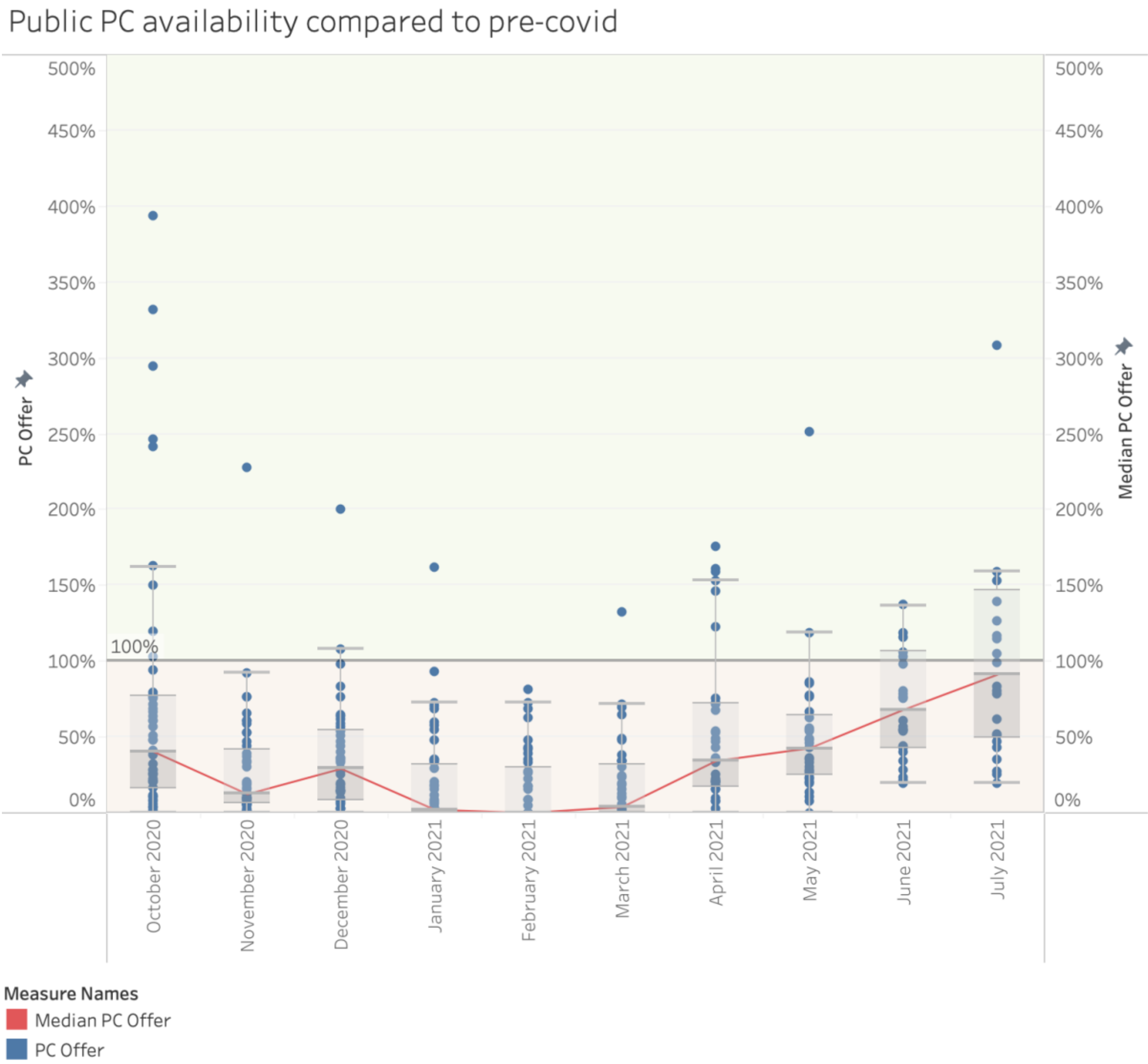
The rapid increase in digital audio lending may also be in part due to people installing the applications on their devices to borrow digital 'reading books', making people more aware of the possibility and range of digital audio books, as they often use the same app.

4 Public PC Offer

The public PC offer has been high at around 90% of library services, and dropped to around 50% in the lockdown starting January 2021. – in the April reopening we have seen the proportion of libraries offering PC access return to around 90%.

While most services have been able to maintain a level of access to public PCs through the periods of restriction, additional cleaning and social distancing requirements have kept this limited to under 50% in April and May 2021. In June and July, however, we see the median availability return to almost 100% - again with some restrictions remaining in June and July.

It is of note here too that there is significant variation as library services focus resources on digital inclusion – some services (not visible on this graph) have put in place 30 to 60 times the capacity offered pre-covid.

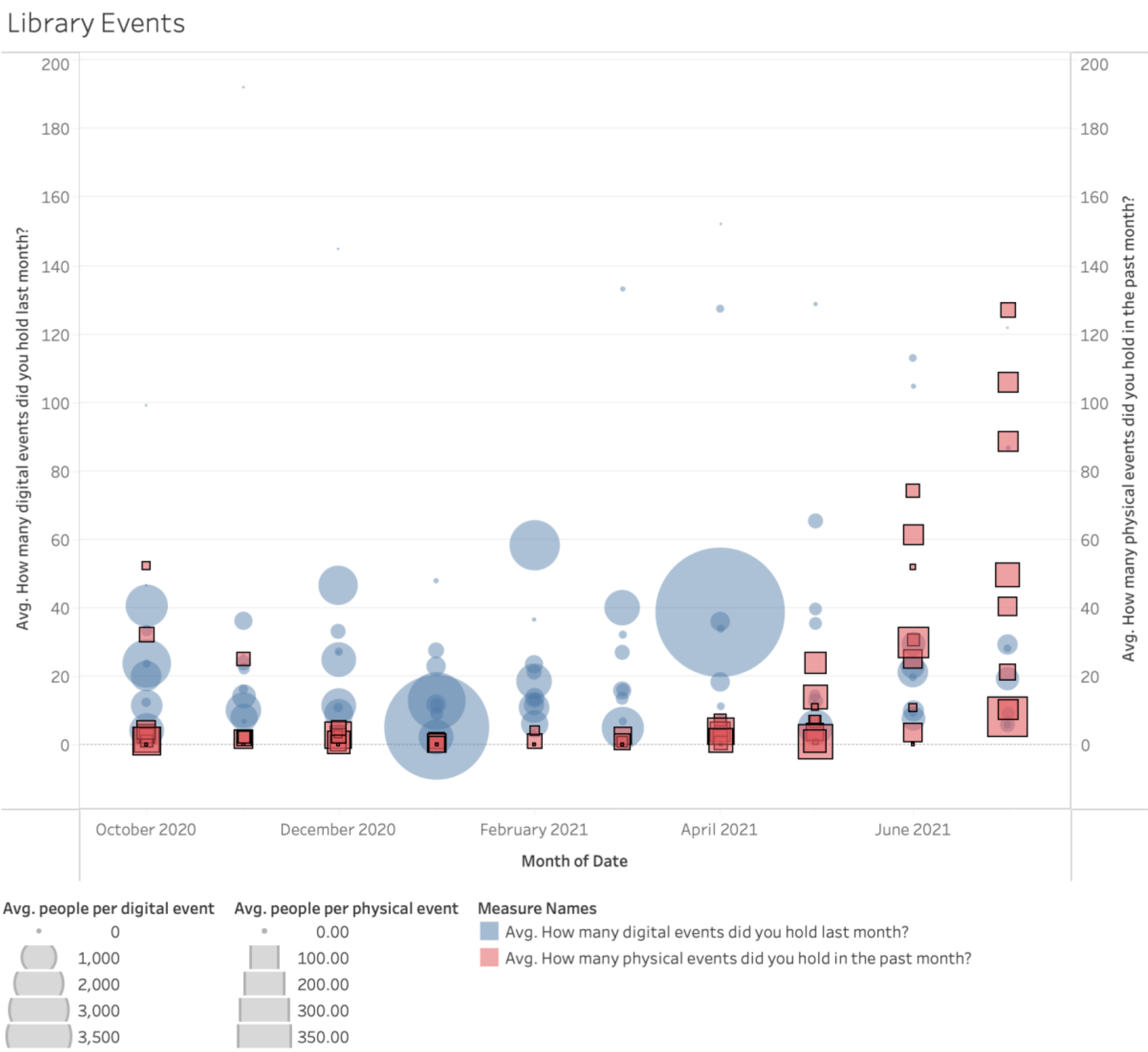


5 Events

The following graph shows:

- Blue circles reflect digital events in a region:
    - distance up the y axis shows the average number of events per library service in that region
    - size of circle shows the average number of people per event
- Red squares represent physical events in a region
    - distance up the y axis shows the average number of events per library service in that region
    - size of square shows the average number of people per event

Note the scale is different for average numbers of people per event – the area for 1 person at a physical event is the same as for 10 people per digital event – the differences in numbers are so large that this is necessary for clarity.



We are seeing continued strong numbers of and attendees at digital events – this is significantly more than pre-covid. May shows a drop in digital events and attendees, as libraries have put on many more physical events and these are showing increasing numbers of people, and this continues into July where large scale digital events do not appear for the majority of libraries.

Over the coming months libraries will have to make difficult decisions around capacity to deliver events – do they focus efforts on reaching more people through digital events, or on 'higher quality' interactions in physical events? It will be unlikely they have the resources to deliver both.