The Library as a part of cultural behavior.
Summary of a large scale survey to identify user trends and reading behavior in Flanders libraries

Bart Vercruyssen
Project Manager,
Vlaams Centrum voor Openbare Biblioteken vzw,
Brussel, Belgium

Introduction

Flemish libraries and library legislation
Since it became mandatory in 1978 that every community, city or village have a public library the Flemish region has what is known as a high “library density”. This means that there are 309 libraries with more than a 1000 service points covering every part of Flanders. In total the Flemish libraries employ about 2400 people, 1600 of which are full time. The majority of library employees are female including at the executive level.

Flemish libraries provide in general a wide range of information and cultural services. In every Flemish library you will find both fiction and non-fiction books, magazines, multi-media resources, databases as well as computer facilities. Two thirds of the libraries also have an audio CD and DVD/video collection.

Depending on the calculation mode between 28 to 35% of the population of Flanders are a member a public library or visit the library. Most of the members of the library, 67%, are older than 15 years old.

Since the year 2000 the library legislation in Flanders has changed profoundly. Whereas prior to 2000 the legislation focused primarily on defining what a library is (what is a library, how many titles, surface of the library ...) the new library law shifted its attention to what a library should do (what is the place of a library in a society). The basis for governmental library subsidy became more qualitative instead of quantitative.

1) Although Belgium barely has a population of 10 000 000 people it is a federation consisting of Flanders (the Dutch part), Wolonia (the French part) and finally the Oostkantons (the German part). Cultural affairs, i.e. library legislation is insight the authority of the ‘federations’, therefore we’ll speak about Flanders here.
In order to achieve this major turn around communities, cities and villages received greater autonomy in dealing with their financial recourses. A business plan for every library became mandatory and a support/expertise centre – the Flemish Agency for Public Libraries (VCOB)- was founded.

The Flemish centre for public libraries
With more than 300 libraries in Flanders and Brussels it became obvious for the VCOB that the greatest opportunities for increasing library performance and efficiency were to be found in centralizing aspects of the back office. Moving processes like cataloguing and acquisition from a local to a supra-local level, created both extra time at the local level and greater expertise at the supra-local level. To make this vision concrete the VCOB was designed to facilitate project management and project organization. Eight project managers and five consultants supervise a variety of projects in the fields of digitalization and technology, library management, readers’ development and marketing.

Two examples of projects that fall under the category digitalization are the building of a central catalogue and the design and exploitation of the library portal (www.bibliotheek.be), which is based on a real time network. Library management projects include business planning, human resources and performance measurement. One of the most important reader’s development projects is an in depth ICT driven cooperation between formal education facilities and libraries. In addition nation wide campaigns have been set up targeting youngsters as well as parents/adults.

Marketing and market research
In the field of marketing a lot of interesting and useful work has already been developed and implemented by individual libraries. Unfortunately these efforts are not indicative of a broader view and vision regarding marketing. Despite some very good efforts, libraries in Flanders are not generally run as costumer driven organizations. In fact, before 2004, there was no way of ascertaining who actually visited the library.

Besides the efforts made in local libraries there have been some large scale events in which all the Flemish libraries worked together in the field of marketing and promotion. These large scale events have been mainly focused around library week. Library week is a week in October when all libraries organize a variety of activities around a mutual theme. Given this situation the VCOB focused it’s marketing attention around three area’s: supporting and improving the existing events on a national level, conducting market research and developing a marketing strategy based upon these studies which can be implemented by the public libraries.
This paper will focus primarily on the market research done in 2004. This involved a major investigation of the people who utilize the library.

**User research**

**Basic assumptions:**
Before 2004 there were basically no useful statistics on library users available. As a direct result of the fact that every library needed a business plan the demand for user data grew. To avoid every library starting its own survey independently the VCOB launched a project that responded to this need for data.

Because the VCOB is a support centre with no actual authority over the libraries we were limited in the ways to set up such a massive project. We calculated that there are roughly two ways to set up such a project. One might set up a training program that enables the interested librarians to perform a survey themselves. Another way would be that the VCOB sets up a survey and publishes the results so they can be used by the libraries.

The advantages of the former method were its low cost and that the VCOB has experience in this approach since it had been successfully used for the process of business planning. The disadvantage lay in the fact that a great effort would be needed from the local librarians who would need training in market research and statistics. Given the educational background of a majority of the staff (human and social sciences) this was not evident.

Together with the University of Brussels the VCOB (Flemish center for public libraries) collected in 2004 an impressive mass of data among the library visitors.

Based on random samples in 165 libraries from more than 32,000 visitors we’ve got the answers on a large survey form as well as what those visitors borrowed during 6 months. As thus this became the largest survey ever performed in Belgium in the field of public libraries.

The collected data is now being used for marketing goals. Using a recent developed logarithm for clustering and starting from their cultural behavior and media preference, six different user groups have been detected among the library user. These types were called: fun seekers, the house sparrow; the cultural passer-by; the cultural fastidious, the omnivores and the cultural elite.

Secondly this approach would have led to a patchwork of data that would have been difficult to compare to each other.

The top down approach guaranteed unified and comparable data, but in order for it to be useful to the individual libraries we knew it was imperative that many people be questioned. At the very least enough people so that something useful could be said for every type and size of library. It became obvious that this data collection would become too expensive.
Therefore a project was designed that combined the best of two worlds. All operations that needed statistical expertise were done on a central level and all tasks involving collection of data, for instance, distribution of the survey forms and entering the answers were done at the local level. In this approach three basic assumptions were formulated:

1. **Scientific correctness.**
   The method of data collection and the data processing had to be designed and performed according to scientific and mathematical standards.

2. **National and local level.**
   By standardization of the survey and method the collected data should be useful for both the local library and at a national level.

3. **Easy to perform**
   All tasks that needed to be done by the local libraries were clear and didn’t assume a specific background from the library employees.

4. **Data useful for marketing**
   The results of the survey needed to be used for marketing. Specifically for increasing existing and new market segments. This aspect will be described in the next chapter.

**Research assumptions**

Even in a non-profit environment the essence of marketing is that it should be used to increase ‘turnover’. As a library our goal is to get new people to utilize our facilities or we want existing users to come to the library more often. A market study is in this respect useful when it reveals interesting market segments. To find interesting segments it behooves us to know why people are, or are not as the case may be, attracted to certain products or services. The question becomes thus: what are the underlying motives for people to visit a library.

Answers to this question were found in recent sociological research by the TOR group at the Free University of Brussels. Based upon studies in the use of time these researchers developed an interesting framework that became the backbone of the survey.

There is great consensus about the fact that post war European society including Flemish society was structured around age, income, gender and religion. These factors were predominant in people’s life and choices. Consequently a whole network of schools, newspapers (media), unions, political movements, socio-cultural institutions, etc. were built based upon these factors. Not surprisingly Flemish libraries were also structured based upon these factors.
The TOR researchers subscribe to the common view that these patterns that structured the post war European/Flemish society have mostly ‘evaporated’. However they refuse to accept that there is no structure at all anymore. In their observations of how people spent their leisure time new and clearly defined patterns were found. Because of their appearance the new factors are called symbolic.

After analysis of all the activities that the examined people did in their free time it became obvious that there were two dominant dimensions in the activities. The first dimension can be called the cultural value of activities. Visiting opera and theater have for example a high cultural value. The other dimension focuses on the fun and action value. Examples of activities with high fun and action value would be visiting sports games and discos.

With these two dimensions a coordinate system with two axis can be drawn, creating as such four different groups or segments.

![Diagram](Fig. 1: Segmentation according to the symbolic society.)

The segment in the upper left field is called “cultural univores”. People in this quadrant participate predominantly in activities with a high cultural value. These people are seen in the museums, opera and theater houses. In their choice of media
this group prefers quality newspapers and information and/or classical radio and TV stations.

At the lower right side the fun/action univore is found. This group exclusively participates in activities belonging to the “fun world”. They are seen at bars, discos, sports events and movie theaters. This group prefers popular newspapers and media.

People in the upper right side are called omnivores because of their tendency to do both type of activities. These people go to the theater and classical concerts, but they also like to go to bars, sports events as well as music events. However their media preference is more similar to that of the cultural univore than to that of the fun/action univore.

Finally in the lower left corner we have the non-participants. These people do not participate in any form of outside leisure at all. This generally, although not exclusively, older group is found at home in front of the television in their free time. Popular media is predominant in this quadrant.

Based upon an analysis of existing datasets it became clear that library visit was also determined by these factors. Library visitors were found unevenly in all four groups but there were strong indicators that the way of use varied accordingly.

Thus the challenge became to reveal which segments came more or less frequently to a library and above all who comes and for what purpose.

**Project outline**

Due to a unique partnership between the VCOB, the research unit TOR and the individual libraries a large set of data was gathered in a relatively short period of time and at a low cost for all the partners involved.

Libraries joined the project voluntarily and paid a small contribution. As already mentioned the libraries also performed most of the fieldwork.

After joining the project a random sample of the members of the library was taken. The library software was then prepared for the survey and the library staff was trained to do the fieldwork.

During six months all data was gathered and analyzed. The results were presented in individual reports and using an interactive website.

**Random sample**

In all the libraries that joined the project a random sample was taken. According to the size of the library these sample varied between 100 and 500 active adult members. An active member was somebody who did at least one transaction in the year preceding the survey.

The members of the library taking part in the sample were check marked in the library software so that their lending activities were stored and so that the
staff at the desk received a reminder to hand out a survey form.

In total 168 random samples were taken in 165 different libraries.

5. Data collection
This part of the project was done primarily by the individual library. Therefore the library staff received a brief training. During this stage of the project a helpdesk was available during office hours.
In total more than 300 people were trained in six days.
In order to get an answer to all the questions that lived at all different levels it was decided that three major datasets would be collected. Knowing a survey form, borrowed items and library features.

Survey form
In a large survey form questions were asked about library use, the library experience, visitors backgrounds and specific variables.

Library use
In this subset questions were asked to reveal how people use the library. For instance, what materials, how do find your materials, when do you come, with who, why, etc.

Library experience
In a number of questions peoples opinions were asked. This part naturally contained many questions about satisfaction, general and specific, but also opinions about the image of the library and its staff.

Background
Not only were people asked about “classic” variables such as age, gender, education, etc. but they were also asked how they spent their leisure time, what kind of media they preferred, as well as general opinions about reading and education.
Specific variables

Finally every local library was given the possibility to add specific questions to the survey form. The majority of these questions were about the use or satisfaction of a specific or new service.

In total 339 different variables per survey were questioned.

Borrowed items

During six months every transaction of the people taking part in the study that was stored. A transaction consisted of what item (book, cd, etc), the title, the author and the borrower's identification number. The identification number consisted of a set of numbers that made it possible to join this set of data to the answers of the survey form.

To obtain this data changes had to be made to the local library systems. Due to privacy laws this information is not automatically stored.

After six months all the libraries sent their data to a central point. It was clear that the local datasets needed data cleaning before it could be consolidated into one database. The union catalogue of the five largest libraries in Flanders was in this respect very useful.

The result is a dataset that can be analyzed in detail on the level of individual borrower, type of material and book genre, title and author both for fiction and non fiction.

Library features

Finally the libraries had to fill in a survey themself. Questions were asked about the library. For instance, how big are the different collections, when is the library open, what are the tariffs, does the library do any particular actions, etc. This information was used for multi-level analysis and provided insight into the relations between the features of a library and the actual user. For example, is there a corollation between the satisfaction of full-time employees and the opening hours of a library?

The added value of all these datasets lay in the fact that they are interconnected and that an almost endless number of relations can be analyzed.

In total more than 32 000 people handed in their survey form and more than 500 000 borrowing activities were registered.

Overview of the first results

Because so much data was collected the analysis was done in different stages. First the results of the survey form were processed and presented. Afterwards an on-line service was created that allowed libraries to present and consult their individual scores.
Finally cluster analysis of the loan statistics will be made as well as the multi-level analysis.

**Results of the survey form**

6. **An individual report for every library**

After all the data of the survey forms was entered in a large database the data was analyzed and structured in way that would be useful for making individual reports. The purpose of these reports was to get an overview of the most important statistics.

   The results were displayed in a way that individual results could be compared to the national average and to the averages of comparable libraries. Using the size of the different collections and the amount of staff five clusters of libraries were made.

7. **Overview of the most remarkable results:**

   **THE LIBRARY USER**

   The library user in Flanders is mainly female. This is even more obvious in smaller libraries than in the bigger libraries, were the proportion of men and women tends to be equal.

   Compared to the Flemish demographics the age group 30 to 44 are overrepresented in the Flemish libraries. Elder people (+60) on the other hand are strongly underrepresented. The part of the age group of 18-26 increases together with the library size.

   As seen in all studies on cultural participation, and thus also in our study on Flemish libraries, the visitors are higher educated than the national average. The larger the library the larger the group of higher educated members.

   Accordingly and not surprisingly given the ages of the people who most use the library, we also see that most of the visitors are employed. Compared to Flanders few retired people visit the library. Students are mostly found in the largest libraries. This is not unexpected considering the fact that most schools and universities are situated in cities which have large libraries.

   The average library user is thus a higher educated woman between 30 and 44.

   **MEMBERSHIP OF THE LIBRARY**

   77,5 % of all members started their library membership in their childhood. The majority (64,4%) never interrupted their membership.

   About one third of the users are a member of more than one library. The largest and the smallest libraries have the highest rates of multiple membership. Most of the people visit the library in their own village, but this number decreases drastically as the libraries become bigger.
REASON OF USE
The library is mostly used for recreational purposes (a good book or CD). Information is for almost half of the people a reason for visiting the library. About a third visit the library for the children. Computer and internet score surprisingly low.

LIBRARY VISIT
An overwhelming majority of the people, 86.6%, visit the library at least every month. The larger the library the bigger the groups of both very occasional as well as heavy users (more than once week) become. The monthly visitors are more predominant in smaller libraries.

A library visit takes in 82.7 of the cases no longer than a half an hour. The bigger the collections the longer a visit takes.

USE OF MATERIALS
Almost all users come to the library for books (98.1%). About half (42.4%) also use CD’s. Comics, video/DVD, cd-rom and magazines are used by +/- 20%.

SEARCHING MATERIALS
Books are found by wondering between the shelves or by going immediately to the title of choice. A smaller but significant amount of, about one third, use the catalogue.

SATISFACTION
Visitors are very satisfied about the different library services. Only the availability of new books and the printer and copy services score a bit less. It is obvious that the bigger the library the less satisfied the people are. This is a strange twist since the availability of new works is actually higher in larger libraries.

73.7 of the visitors indicate that they are satisfied about the opening hours. When
asked when a library should additionally be open Saturday afternoon and, to a lesser extent Sunday morning, were the top answers.

8. In depth on-line analysis for libraries with large samples
For larger libraries it was possible to take a bigger sample (up to 500 respondents). In these libraries it is possible to perform more in depth analysis of the survey form since more variables can be investigated simultaneously. Therefore a web application was designed where libraries could explore their own data in an interactive way.

By entering an unique code the library get access to its individual data. By choosing different variables out of a drop menu the library can combine two variables. The cross tabulated variables can be shown in tables as well as in a bar chart format. With this application it is possible to see if there is any dependency between variables. For example, it can be seen that especially younger people (variable age) are the least satisfied (variable satisfaction) with the library.

This application also provides the possibility to compare the individual results with the cluster averages, both in the numeric as in the graphic mode.

If the count for an individual cell is too low the application gives an indication. In this case one might conclude that the observed phenomena is rare, but the actual percentages should not be used in any further analysis.

MARKETING CONCLUSIONS
Based upon this data marketing conclusions can already be made.

A more thorough investigation of the data shows that the age variable follows a particular strange pattern. The age curve of the library visitors starts with a steep drop for the age group 18-30. At 30 years the curve starts to climb again to reach its highest point at the age of 40. After this age the curve starts to decline although less dramatically than the way it did between ages 18 and 30. Finally at an age of 70 the decline seems to almost stop.

By examining the curve four age groups can be defined (18-30; 30-45; 45-60; 60+) which we will look at more closely.

9. 1. Young and functional user
This group visits the library more than average for information which they need for study and/or work. The youngsters come to the library with a well defined plan and tend to utilize the catalogue to find their materials. Out of all the users they use the most variety of materials; books, audio, comics and the computer. Out of all the groups this group uses the computer the most.

A very important characteristic of this group is that they are the most unsatisfied of all the different groups. In fact if somebody is dissatisfied it will most
likely be someone from this group.

This is the functional, young and unsatisfied multi-user!

10. **II. The young families**
The group between 30 and 45 has the most females out of all the different groups. Actually the aforementioned image of the library user as a higher educated women in her thirties is the most applicable for this group. If asked why they are visiting the library one reason is stands out, the children. Besides computers and internet, this group uses almost al materials in the library. Compared to the other groups, they use the most DVD’s.

The 30-45’ers use the library as a shopper would do, on a saturday or during the week in the evenings, this group finds the materials by walking through the shelves without a specific plan. In fact when this group visits a library in another town than were they live, the reason is most often because they can combine it with shopping and/or the children’s school. This group is mainly satisfied with the library.

An interesting aspect of this group is that we know that they were library members when they were young however the majority indicates that they interrupted their library use. This info leads us to believe that there is an opportunity to win back a part of the 18-30 year olds whose library use is, as we saw, in a steep decline.

11. **III. The middle aged recreational user**
From the age of 45 the curve starts to decline again. Under this part of the curve we find a group that uses the library in its most traditional way, they come to borrow books for recreational purposes. They find a books using no specific strategy, just by wandering through the library or by consulting the stands with new books. Consequently they enter the library with no specific plan.

Although declining, this group is highly satisfied with the library.

12. **IV. The retired library excursist**
Finally, the remaining group consisting of age 75 years old and up is a very specific group. They’re the most frequent library users, the scores for weekly or daily visits are the highest in this group. Coming to the library seems to be a social event for the retired library excursist. In this group we find high numbers for activities like reading a paper, meeting people or even because they just like library. Consequently it is no surprise that they stay longer than average in the library.

If we look at the use of the computer facilities we see that they use them often or don’t use the computer facilities at all. There is no inbetween.

This group is satisfied about the library and it’s services in an almost suspicious way, some services are rated ‘exceptional’ by al the members of the group.
Starting from this analysis the VCOB is shifting its marketing attention to the two middle groups. Via promotion the re-entry of the 30-years old must be intensified and by loyalty and retention programs the drop out of the 45-years old must be tempered.

To do so, deeper insight is needed into the core of these two groups. Therefore the aforementioned framework as outlined by TOR is useful.

SYMBOLIC SEGMENTS
As it was mentioned in the project outline the aim was to use this data for marketing purposes. Therefore segmentation using the framework of the TOR researchers proved useful.

Analysis of the loan statistics is still in progress but a first clustering, based mainly on the survey, reveals indeed six different ‘symbolic’ groups, as seen in the table below.

The popular univore is a younger segment. They are more female and have in general a lower level of education (compared to the other library users).

![Fig 4: The symbolic segmentation of the library user.](image-url)
In their leisure time they like activities that belongs to the “fun world” (bars, discos, sports events and movie theaters). On the other hand they don’t go to pure cultural activities. They prefer popular media.

The house sparrow is called so because this segment doesn’t participate much at outdoor leisure activities at all: they’re not seen at fun activities, nor at cultural activities. This middle aged, more female group has the lowest level of education and also prefers popular media.

<table>
<thead>
<tr>
<th></th>
<th>Cultural axis</th>
<th>Fun axis</th>
<th>Media</th>
<th>Demographics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Popular univore</td>
<td>Low</td>
<td>High</td>
<td>Popular</td>
<td>Level of education: low Age: mainly young Gender: Female</td>
</tr>
<tr>
<td>House sparrow</td>
<td>Low</td>
<td>Low</td>
<td>Popular</td>
<td>Level of education: lowest Age: active age group (30-60) Gender: more female</td>
</tr>
<tr>
<td>Cultural tourist</td>
<td>Medium</td>
<td>Medium</td>
<td>Popular</td>
<td>Level of education: high</td>
</tr>
<tr>
<td>Cultural fastidious</td>
<td></td>
<td></td>
<td>Quality</td>
<td>Age: just above the active age Gender: more even</td>
</tr>
<tr>
<td>Omnivore</td>
<td>High</td>
<td>High</td>
<td>Quality</td>
<td>Level of education: high Age: young Gender: even</td>
</tr>
<tr>
<td>Cultural elite</td>
<td>High</td>
<td>Low</td>
<td>Quality</td>
<td>Level of education: highest Age: Older Gender: even</td>
</tr>
</tbody>
</table>

Fig 5: Overview
The cultural tourist and the cultural fastidious are similar groups. They’re both higher educated and a bid older than the former group. Gender wise they’re more evenly divided. Both the cultural tourist and the cultural fastidious have an average score on the fun and cultural axis. The big difference between the two of them lies in their media preference: the tourist prefers popular media, the fastidious prefers quality media.

As we can expect he omnivore participate both on fun and cultural activities. In this younger and higher educated segment the proportion men and women are almost equal. They prefer quality media.

Finally the older and high educated cultural elite only goes to cultural leisure activities. The prefer quality media and also are gender wise evenly divided.

Conclusion

Due to an unique partnership between the support centre for Flemish Public libraries, 165 libraries and a university, a process of data collection an analysis was successfully completed.

The results of the survey showed that the Flemish library user is more educated and more female and between the 30 and 45 years old. The recreational function of the library seams to be the most important for users and they are very satisfied.

Based on the lifecycle four groups could be identified. Based upon this insight promotion attention should be drawn to the group between 30 and 45 since this is a group that tends to return to the library. Loyalty and retention programs should be designed for the group after 45.

Further investigation showed that based on cultural behavior and media preference, library users can be segmented into different interest groups.

The next step will be that this information should be translated in an operational marketing strategy. Further also the lending histories will be incorporated in the survey.

Abstract:

Together with the University of Brussels the VCOB (Flemish center for public libraries) collected in 2004 an impressive mass of data among the library visitors.

Based on random samples in 165 libraries from more than 32 000 visitors we’ve got the answers on a large survey form as well as what those visitors borrowed during 6 months. As thus this became the largest survey ever performed in Belgium in the field of public libraries.
The collected data is now being used for marketing goals. Using a recent developed logarithm for clustering and starting from their cultural behavior and media preference, six different user groups have been detected among the library user. These types were called: fun seekers, the house sparrow; the cultural passer-by; the cultural fastidious, the omnivores and the cultural elite.