
Envisioning the library of the future Phase 1: Delphi enquiry

Research by Ipsos MORI and Shared Intelligence

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Ipsos MORI



Wave one and two: top line results

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This document provides the top line results for two waves of a Delphi enquiry on the future of libraries conducted by Ipsos MORI in conjunction with Shared Intelligence on behalf of Arts Council England.

The main aim of the survey was to ask a panel of invited experts to consider a series of statements about how the country might look in 10 years' time, as a result of societal, economic and technological changes - specifically the degree to which they are likely to happen and if they will have an impact on the library sector. The statements were developed jointly with Arts Council England, drawing on an evidence base of publicly available data.

By carrying out a second wave of the survey we are able to establish how views change, if at all, when results of the first round are presented to respondents.

The survey was conducted online between 22 March and 3 April and 16 to 23 April 2012 amongst a purposive sample of 201 stakeholders and professionals, from a wide range of disciplines in the UK and abroad.

Results are based upon 85 responses in wave one, representing a response rate of 41 per cent, and 61 responses in wave two, representing a response rate of 30 per cent. 46 respondents completed both waves of the survey, representing 75 per cent of wave two respondents.

Results are based on all respondents and are unweighted. Where results do not sum to 100, this may be due to computer rounding.

Wave one and two: key findings

The results are based on respondents who are very familiar with the library sector. The majority of them (over 60 per cent in both waves) have worked in the public library sector for more than 10 years. Three quarters (75 per cent in both waves) say that they have a good or advanced knowledge of libraries.

Around half (49 per cent and 55 per cent respectively over each wave) work in local authorities, but respondents also include experts from a range of backgrounds including cultural organisations and charities.

In general, statements falling into the consumer trends, technology and information, learning, education and literacy, and public sector reform categories were those which were thought to have the highest impact on libraries.

There were a number of statements where respondents thought there would be high likelihood of these things happening *and* a high impact on the sector – suggesting these might be a big focus for the scenarios and future discussion. For example, there is a clear sense that the increasing demands on public services and budget challenges are not going to go away any time soon, and this is all likely to be affecting what libraries will look like in 10 years' time – the question is what this means and how libraries adapt.

There appears to be anxiety about the implications of localism and the public service reform agenda too – there are mixed views about the likelihood of the various associated statements happening, but the impact of each of them is seen to be high. During the second wave of the Delphi, strength of sentiment increased against each statement.

Consumers habitually using more portable devices (such as Smartphones) to gain immediate access was the statement that respondents thought was most likely to happen *and* to have the highest impact on libraries in wave one. Indeed, increasing consumer expectations around accessibility and instantaneous services, matched with the growth in portable/mobile devices, were up there too.

In wave two, the statement with the biggest impact on libraries was felt to be *reduced public sector budgets having led to a major shift from universal provision of service to targeting only those most in need*, indicating the way in which services are provided are anticipated to change significantly in the future in order to meet the budget pressures being faced in the public sector.

There is a sense that respondents will still see an important role for libraries when it comes to learning, education and literacy – on all of these statements likely impact on the library sector was thought to be high. Again, it will be interesting to explore just what this means in terms of the role libraries will expect to play in up-skilling and supporting people in the future.

Statements concerning changes in demographics and household make-up, whilst thought to be fairly likely, were not thought to have as significant an impact on libraries, compared with the above – with the exception of the ageing population issue; this is the demographic trend that almost all respondents said is *very likely* to happen and with a high impact on libraries. There is also concern about the impact of these trends – with high mean scores for likelihood and impact when it comes to *the demand on public service continuing to outstrip supply*.

In both waves, the least likely change was felt to be *people being less inclined to mix with others from different cultural and ethnic backgrounds*. In fact, mean likelihood dropped more around this statement than any other between the waves. *The number of single-person households continues to increase* is the statement that respondents thought would have the lowest impact on libraries.

One result that being able to see the first round responses appeared to have was that respondents felt most statements were *more* likely to happen and would have a *greater* impact the second time around. Of the 49 statements, 39 were felt to be *more* likely by wave two respondents, and 46 were felt to have *more* of an impact. This implies that respondents' views are more likely to converge somewhat once they see what their peers think.

Of the three impacts which decrease between the waves, the largest difference was with *parents and guardians increasingly requiring childcare from a network of carers including extended family and paid carers* (albeit only a small change between the mean scores).

The most marked difference between the two waves was around the statement *reading for pleasure has remained one of the nation's favourite pastimes*. This increased the most in terms of its likelihood and its impact. This implies that though both are seen to be high, there is still some uncertainty when it comes to how reading might be affected by tomorrow's technology.

See the background questions and individual results