Cross-European survey to measure users' perceptions of the benefits of ICT in public libraries

Final report

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TNS

BILL & MELINDA GATES *foundation*

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Objectives and research approach

Public libraries across the European Union (EU) have long played an important role in communities by providing free access to information, guidance from trained librarians, and public meeting space. As meaningful participation in society increasingly requires access to digital information and resources, many public libraries in the EU have expanded their offerings to include access to information and communications technologies (ICTs) like computers and the Internet.

Under the Europe 2020 Strategy for smart, sustainable and inclusive growth, the EU has set ambitious objectives in many of the development areas to which access-to-information efforts contribute – specifically employment, innovation, education, and social inclusion. EU member states are expected to meet targets in these areas by 2020. There is anecdotal evidence that ICT access through public libraries can support the implementation of the specific growth, education, and cohesion policies related to the EU 2020 Strategy.

TNS, an independent research company with a global presence, was commissioned by the Bill & Melinda Gates foundation to conduct research across 17 EU countries to identify perceptions and types of use of public libraries. The purpose of the research was to understand the impact that public libraries in the EU have on users' lives.

The research included:

- a workshop among the study stakeholders to discuss the priorities for the research;
- desk research, to collate key data concerning libraries;
- a survey of a representative sample of the population aged 15 and over in each of the 17 countries;
- a survey among library users and public access computer (PAC) users aged 15 and over, in each of the 17 countries, conducted in libraries; and
- qualitative research among library users and library staff.

The public library landscape

- The desk research estimates that there are more than 65,000 public libraries across the whole of the EU.
- In most countries, the vast majority (80% or more) of libraries offer PACs, the exceptions being Germany and Bulgaria.

Library and PAC usage

- Nearly one in four adults – that is 97.3 million adults across the EU – have used a public library in the last 12 months. Generally speaking those countries with the highest levels of per capita spending on libraries have the highest levels of usage. Those living in Finland and Denmark were

most likely to use libraries, at 67% and 57% respectively; those in many of the Southern and Eastern European countries have much lower levels of usage – specifically Greece (9%), Portugal (12%), Bulgaria (12%), Italy (14%) and Romania (16%).

- 13.9 million adults across the EU – or 4% - have used a PAC in the last 12 months. Usage patterns by country echoed those noted for public library usage in general. Thus in Finland (19%) and Denmark (19%) PAC usage was very high, while in Bulgaria, Poland, Portugal, Italy, France, Greece and Germany it was much lower, at 1 – 2% of all adults in each country.

Figure: 1.1 Number of library users and PAC users compared with EU population
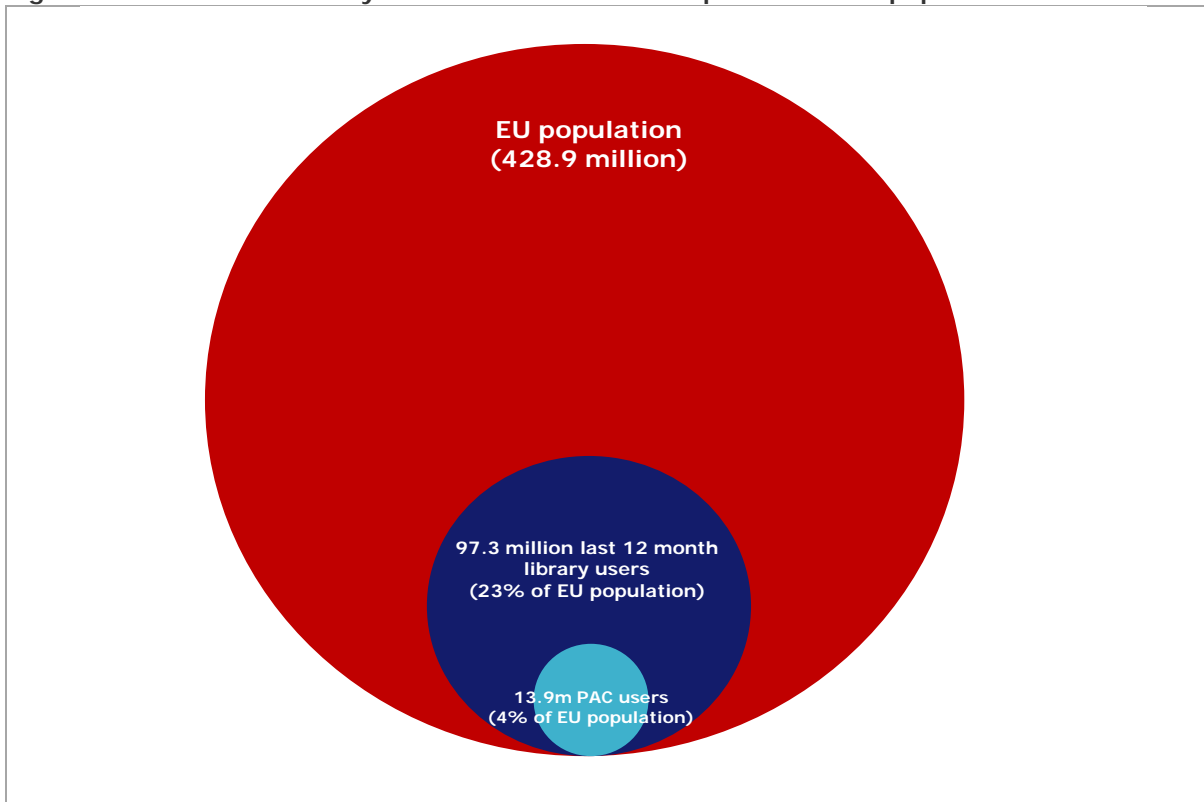

Source: Eurostat 2011/2012 & Omnibus survey Q1. Have you visited a public library in the last 12 months? & Q4. In which of these places have you used a computer connected to the Internet in the last 12 months...
Base: All respondents (17816)

- In terms of demographic groups, PAC usage was highest among young people between the ages of 15 and 24, those still in full-time education, and among those born outside of the EU.
- While PAC use is, in the main, a relatively infrequent activity, the traditionally 'digitally excluded ' or 'socially excluded' groups such as the Roma, ethnic minorities, migrants and those who finished their full-time education at a relatively early age form a 'core' of regular users, and are particularly reliant on the service.
- The primary motivations for PAC users are the free nature of the service together with the lack of other options that people have. In particular, those who have no other options tend to be some of the 'digitally excluded' groups – the Roma, those with a disability, older people aged 55 and over, those not employed, and people completing their full-time education at a relatively early age.
- The survey estimates that 4.6 million adults *first* used a computer to access the internet in a public library, highlighting the role that libraries play in setting people on the path to computer usage.

- The PAC service was highly regarded by users. The overwhelming majority (92%) of PAC users believed the library's computer and internet connection service as valuable. Those in Bulgaria, Portugal, Lithuania, Poland and the UK place a particularly high value on the service. Similarly 91% of PAC users were either 'very satisfied' or 'satisfied' with the PAC service.
- The chart below shows how countries cluster together in terms of usage and the value placed on the service by users. There are five distinct clusters:
    - High usage, medium value – Denmark and Finland
    - Medium usage, medium/high value – UK, Latvia, Lithuania, Belgium, Netherlands
    - Low usage, high value – Portugal, Poland, Bulgaria
    - Low usage, medium value – Spain, Czech Republic, Romania, Greece and France
    - Low usage, low value – Germany and Italy

Figure: 1.2 Value placed on PACs compared to usage levels
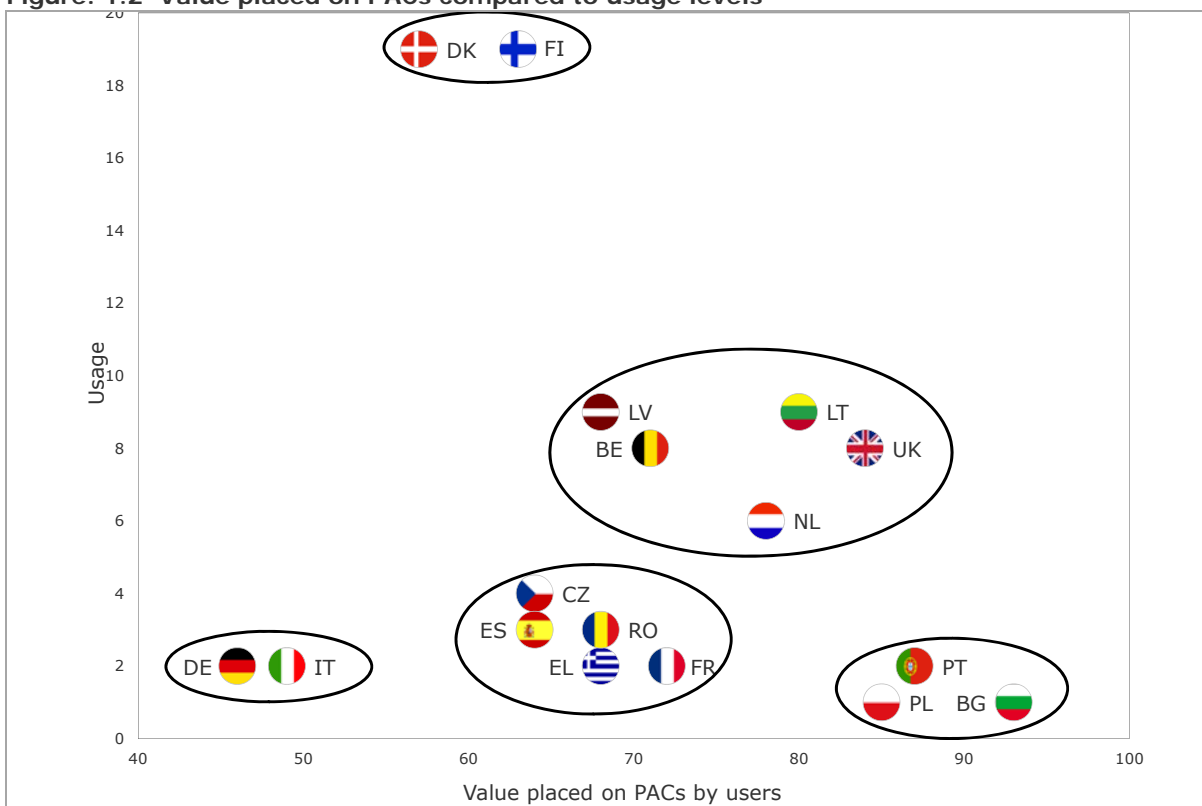
Source: Library Survey-C4- Have you used a public access computer in the last 12 months in a public library to access the Internet in the last 12 months? C30 How much do you value the library's computer and Internet connection?
Base: All respondents (24253); All PAC users (11716)

Perceptions and impacts of public libraries

- Belief in the importance of library provision of free computers and internet was high among both PAC users and library users in general. About seven in ten library users felt that 'free access to computers' and 'free access to the internet' in libraries were either very or extremely important.
- Although nearly three in ten respondents felt unable to express a view (presumably because they were unfamiliar with their local library), the majority of the remainder felt that their library was at least 'fairly effective' in meeting community needs. Moreover, despite the climate of austerity across much of Europe during the fieldwork, 40% of the public still felt that public libraries merited more financial support than at present, in part because they believed that the free ICT

libraries offer becomes more important as domestic budgets tighten. Only 5% felt that libraries deserved less financial support.

- At a top level, 83% of PAC users indicated that their PAC use had delivered at least one impact: this equates to 11.5 million EU adults. The most common impacts were saving time and money, but also more specific impacts around education, access to government services and access to resources and skills necessary to find work. Indeed 8.5 million EU adults reported one of these three impacts. Those aged 15 – 24 and those aged 55 – 64 together with the Roma were most likely to report such impacts.
- Perceptions of libraries among users were positive. More than nine in ten library users agreed that public libraries were accessible to everyone, provide access to information to those who don't have this elsewhere, and are friendly and welcoming. Three-quarters of library users agreed that libraries are modern and innovative.

Informal and non-formal learning

- The survey provides evidence of very widespread informal learning activity in libraries, which contributes significantly to the EU's agenda on informal and non-formal learning, particularly around *inclusive* learning. About 24 million adults across the EU (one in four library users) have taken part in informal learning activities in libraries in the last 12 months: and around 2.3 million adults have attended a computer training class in a library. Those aged 65 and over; those from rural areas; and the Roma and ethnic minorities are the most likely to have participated in informal learning.
- About half of those who had used a PAC reported that they had been shown or helped to do something by a member of library staff in the last 12 months.

Employment and use of PACs for business

- The survey found that c.4.1 million adults had used library computers to support some employment related activity. These people tended to be in the 25 – 54 age group, and were particularly likely to come from a minority ethnic group, be a migrant, or from the Roma community.
- 1.5 million PAC users had used a PAC to apply for a job in the last 12 months, and about a quarter of a million of these had been successful in securing employment by this means.
- About 0.9 million adults (or 7% of PAC users) had used PACs for business purposes and around 2.7 million adults – or 20% of PAC users – had used PACs for finding information related to a business they worked in.

E-Government and active citizenship

- Across the EU, about 3.3 million adults had used PACs to interact with public authorities. The figure varied considerably by country – from just 14% in Poland to 37% in the Netherlands. Men, those currently employed, those in rural areas, minority groups and the Roma were particularly likely to interact with public authorities in this way.
- The survey estimates that around 0.3 million people across the EU have used PACs to send filled in forms for the purpose of tax declaration.
- Use of PACs for active citizenship varied considerably by country, with a clear South/East and North/West Europe divide. The former were the most likely to engage in this way; the latter the least likely. Overall about 3.7 million adults in the EU had used PACs for active citizenship in the last 3 months.

Acknowledgements

Disclaimer

1. Introduction

1.1 Context for the research

Public libraries across the European Union (EU) have long played an important role in communities by providing free access to information, guidance from trained librarians, and public meeting space. As meaningful participation in society increasingly requires access to digital information and resources, many public libraries in the EU have expanded their offerings to include access to information and communications technologies (ICTs) like computers and the Internet.

There is a growing body of evidence about the ways public access to ICTs contributes to economic, health, education, and social development[1]. For instance, the Global Impact Study on Public Access to ICTs, which covers five developing countries, found that those using Public Access Computers reported positive impact related to communication (79%), education (78%), access to government information (40%) and health (37%). More than 80% of public services in the EU are now fully available online,[2] but in 2011, just 41% of the EU population used government services electronically.[3] Today, some Europeans have their first experiences with computers or the Internet at a public library, and for some individuals this may remain the only place they can access ICTs (or access them without paying unaffordable fees)[4].

Under the Europe 2020 Strategy for smart, sustainable and inclusive growth, the EU has set ambitious objectives in many of the development areas to which access-to-information efforts contribute – specifically employment, innovation, education, and social inclusion. EU member states are expected to meet targets in these areas by 2020. There is anecdotal evidence that ICT access through public libraries can support the implementation of the specific growth, education, and cohesion policies related to the EU 2020 Strategy, such as digital skills and inclusion milestones described under the Digital Agenda for Europe (one of seven flagship initiatives of the Strategy) or informal and non-formal learning, which is mentioned in three of the seven flagship initiatives. In other policy areas, such as supporting a skilled workforce and connecting people to employment opportunities, public libraries' roles may be less obvious and additional data are needed to demonstrate the contributions of public libraries and help them secure EU support for their work.

The Global Libraries program of the Bill & Melinda Gates foundation aims to ensure that all people, especially those in disadvantages communities around the world, have access to information through

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[1] See The Global Impact Study of Public Access to Information & Communication Technology about the scale, character, and impacts of public access to information and communication technologies. Looking at libraries, telecenters, and cybercafes, the study investigates impact in a number of areas, including communication and leisure, culture and language, education, employment and income, governance, and health. Implemented by the University of Washington's Technology & Social Change Group (TASCHA), the Study is part of a broader research project supported by Canada's International Development Research Centre (IDRC) and a grant to IDRC from the Bill & Melinda Gates Foundation.
[2] Eurostat, 2010
[3] Eurostat, 2011
[4] Sciadas, G., with Lyons, H., Rothschild, C., & Sey, A. (2012). *Public access to ICTs: Sculpting the profile of users*. Seattle: Technology & Social Change Group, University of Washington Information School.

technology in public libraries. Global Libraries is currently working in five EU countries: Bulgaria, Latvia, Lithuania, Poland, and Romania[5].

1.2 Research objectives

TNS, an independent research company with a global presence, was commissioned by the Bill & Melinda Gates foundation to conduct research across Europe to identify perceptions and types of use of public libraries. The purpose of the research was **to understand the impact that public libraries in the EU have on users' lives**.

Specifically the research aimed to:

- Collect robust cross-country data on the benefits to users that result from their access to ICTs in public libraries in a variety of EU countries
- Improve the quantity and quality of data that demonstrate the magnitude and impact of the activities happening in public libraries
- Better understand similarities and differences in user impacts across Europe
- Highlight innovative case studies or examples that can complement the quantitative data and serve as models

1.3 Research method

In brief, the research comprised the following:

1. **A workshop among key stakeholders to discuss the key priorities for the research**. This involved participation of representatives from the Bill & Melinda Gates foundation, the University of Washington, impact assessment specialists from the five Global Libraries grantee countries, Civic Agenda and TNS.
2. **Desk research**, to collate key data concerning libraries, conducted in 17[6] of the EU countries. Together these countries account for over 90% of the EU's population[7].
3. **An omnibus survey** in each of the 17 countries, to provide basic data on library and public access computer (PAC) usage, based on a robust sample of the national adult population aged 15 and over. A total of 17,816 interviews were conducted – c.1000 in each of the 17 countries.
4. **A mainstage survey among library users and PAC users** aged 15 and over, in each of the 17 countries, conducted in libraries. A total of 24,253 interviews were achieved: 11,716 with those who had used a PAC in a library in the last 12 months, and 12,537 with those who had used a public library in the last 12 months (but not a PAC).
5. **Qualitative research** in each of 18[8] countries, four group discussions with PAC users, and 5 depth interviews with library managers and senior managers.

Further details about the methods used in the research can be found in Appendix A.

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[5] **Bulgaria** – Glob@l Libraries Bulgaria Programme, a joint initiative of the Bulgarian Ministry of Culture, the United Nations Development Programme, the Bulgarian Ministry of Transport, Information Technology and Communications, the National Association of Municipalities in Bulgaria and the Bulgarian Library and Information Association
Latvia – Father's Third Son, a project of the State Agency "Culture Information Systems"
Poland - Library Development Program, managed by the Information Society Development Foundation (FRSI) and supported by the Polish-American Freedom Foundation.
Lithuania - Libraries for Innovation project, an initiative of the National Library of Lithuania and the Ministry of Culture
Romania - IREX/Biblionet Romania
[6] The 17 countries were Belgium, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Spain and the UK.
[7] Source: Eurostat (population aged 15+). 2012 data (2011 data when 2011 not available).
[8] Sweden was included in the qualitative research, but not in the other research components.

The initial stakeholder workshop took place on 17 September 2012, with the research then taking place during late September to mid-December 2012.

1.4 This report

This report provides a brief overview of the results from 2 – 5 above. In addition a number of other outputs have been provided as follows:

- Individual country summary reports for all 17 countries included in the study.
- The full dataset for the quantitative elements (3 and 4 above) of the project.
- A set of slides containing relevant graphs and tables providing full summaries of the data from each of the main elements of the survey and showing how these contribute to the main project findings.
- A PowerPoint presentation of the key survey findings.

1.5 A note about abbreviations

Please note that the following abbreviations are used throughout this report:

BE	Belgium	IT	Italy
BG	Bulgaria	LT	Lithuania
CZ	Czech Republic	LV	Latvia
DE	Germany	NL	The Netherlands
DK	Denmark	PL	Poland
EL	Greece	PT	Portugal
ES	Spain	RO	Romania
FI	Finland	UK	United Kingdom
FR	France		

Throughout the report, results for individual countries are presented in alphabetical order, based on the above abbreviations.

Also note throughout this report where we refer to:

- A 'library': This means a public library, which anyone can go to, and does not include school, college, or university libraries
- 'PAC user/usage': This refers to usage of a public access computer to *access the internet within a public library,* and is based on those who responded affirmatively to the following question:

    o Have you used a public access computer in a public library to access the internet in the last 12 months? Please do not include using your personal computer or smart phone in the library.

1.6 A note on statistical techniques

The level of confidence that we can place in the data varies according to the sample size and to where in the range of 0% to 100% the measured figure is, i.e. the percentage of people who answer a question (the survey statistic). However, the following table gives broad guidance on the confidence that we can place around any one statistic for the different sample sizes used in the various components of the survey. So for example, any percentages quoted for individual countries samples of library users will be subject to a confidence interval of ±3.7% which means that if a percentage of 40% is quoted, we can be 95% sure that the real percentage lies between 36.3% and 43.7%.

Sample size	Maximum confidence interval
17,816 – General public omnibus survey	±0.7%
24,253 – Library and PAC users	±0.6%
12,537 – Library users (not PAC)	±0.9%
11,716 – PAC users	±0.9%
1,400 – Typical sample size of library and PAC users within each country	±2.6%
700 - Typical sample size of library users (not PAC) within each country	±3.7%
700 - Typical sample size of PAC users within each country	±3.7%

While most of the data is presented in terms of percentages, on a number of occasions throughout this report data have been grossed up to represent a 'proxy' for the 28 countries of the EU and are presented in terms of estimated numbers.

2. The public library landscape

Key points:

- The desk research estimates that there are more than 65,000 public libraries across the whole of the EU.
- In most countries, the vast majority (80% or more) of libraries offer PACs, the exceptions being Germany and Bulgaria.

This chapter provides a brief overview of the public library landscape across Europe, and aims to give a context for the remainder of the report, in providing a basic understanding of the numbers of libraries and the level of funding in each country. It draws on the desk research, which sought to provide basic information on the public library systems in each of the 17 countries, together with contextual information on internet access in the relevant countries.

Figure 2.1: Number of libraries (per 10,000 population)

Number of libraries per 10,000 population

Less than 1
1 – 1.9
2 – 2.9
3 or more
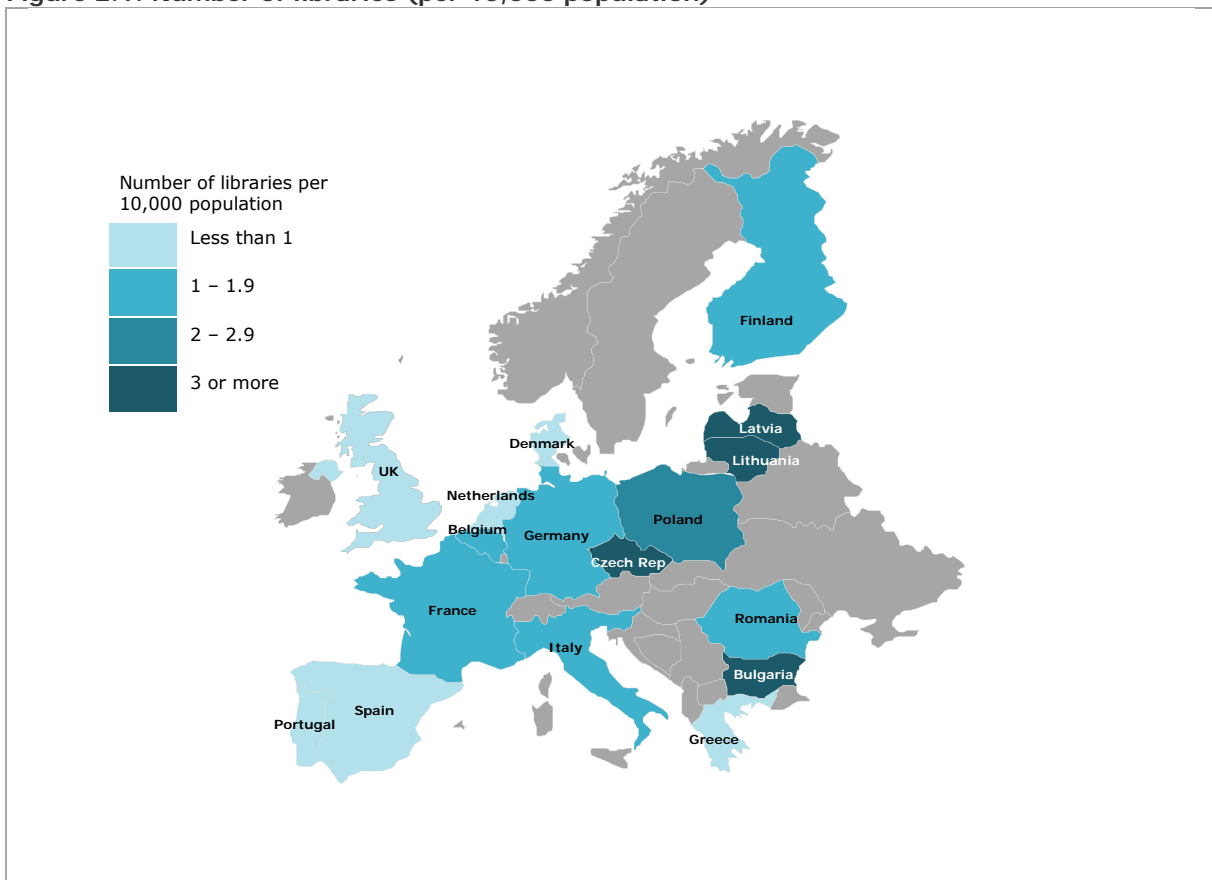
Source: TNS desk research

Overall the desk research estimated that there exist a total of more than more than 65,000 public libraries across the EU. In terms of numbers of libraries per person, this ranges quite considerably, from a low of about half a library per 10,000 population in the Netherlands, Greece and Portugal, to in excess of four libraries per 10,000 population in the Czech Republic, Bulgaria, Lithuania and Latvia. Figure 2.1 presents this information for each of the seventeen countries.

The map below clearly shows where the relatively high and low spends per capita[9] are. The high spends per capita are in Finland and Denmark. At the other end of the scale, relatively low spends per capita exist in Portugal, Poland, Romania, Latvia and Lithuania. Given its high Gross Domestic Product Germany also has a relatively low spend at just c.11 Euros per capita.

Figure 2.2: Annual spending on libraries per capita
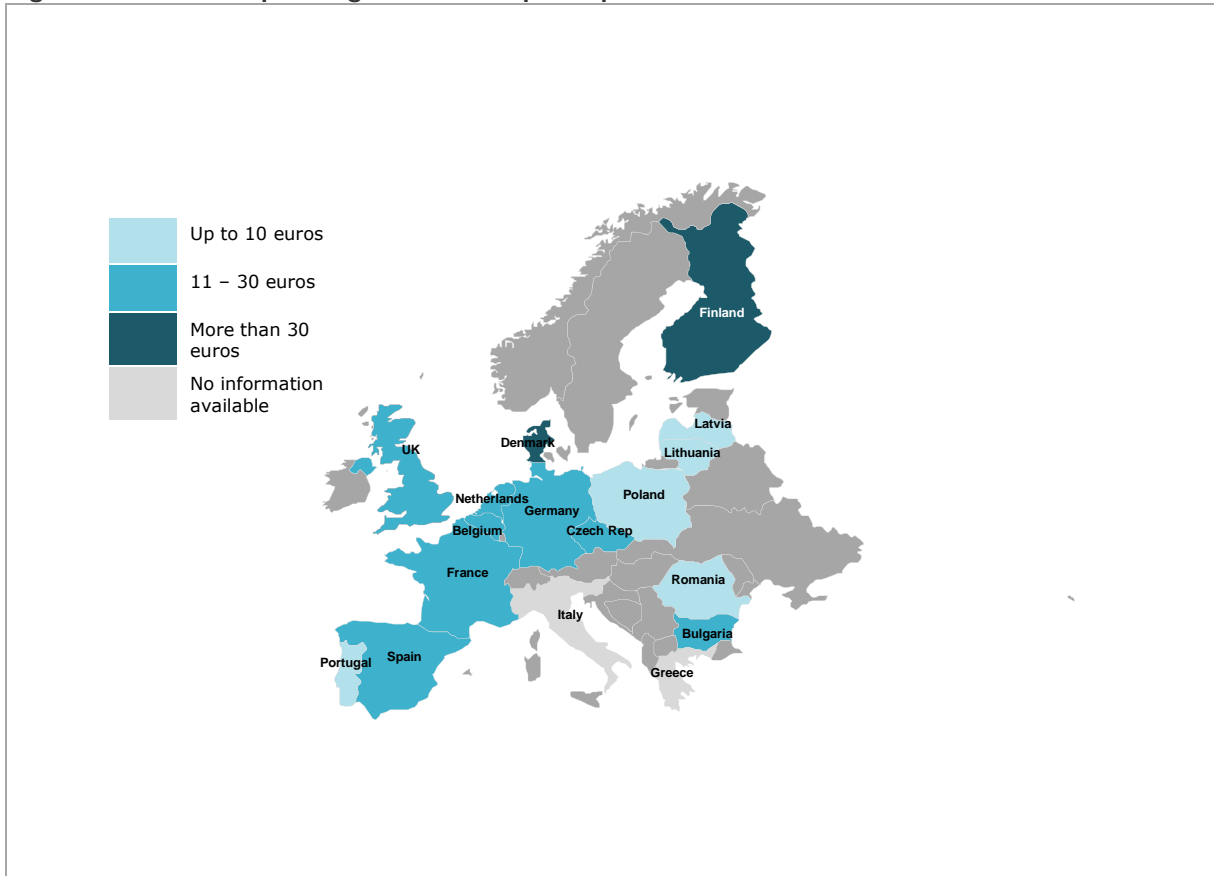
Source: TNS desk research

The facilities offered by libraries vary considerably. **However, regarding PACs in most countries the vast majority (80% or more) of libraries offer this service to the public.** The exceptions to this rule are:

- Germany – where only 30% of libraries offer PACs (this may in part be due to the fact that in Germany some libraries are funded by the church)
- Bulgaria – where only 40% of libraries offer PACs.

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[9] Note that while the data on expenditure have been taken from reliable sources, inevitably there are differences in what has been included in the calculations in different countries, and consequently this information should be treated as indicative only

The chart below shows Eurostat data (2011) for internet access at home. It shows that levels of internet access at home vary very considerably across the 17 countries, from very high levels (80% or more) in Finland, Denmark, Germany, the Netherlands and the UK – to levels of 50% and below in Bulgaria, Greece and Romania. In a sense it highlights some countries with low levels of internet access at home, where access to PACs is likely to be particularly important.

Figure 2.3: % of households with internet access at home
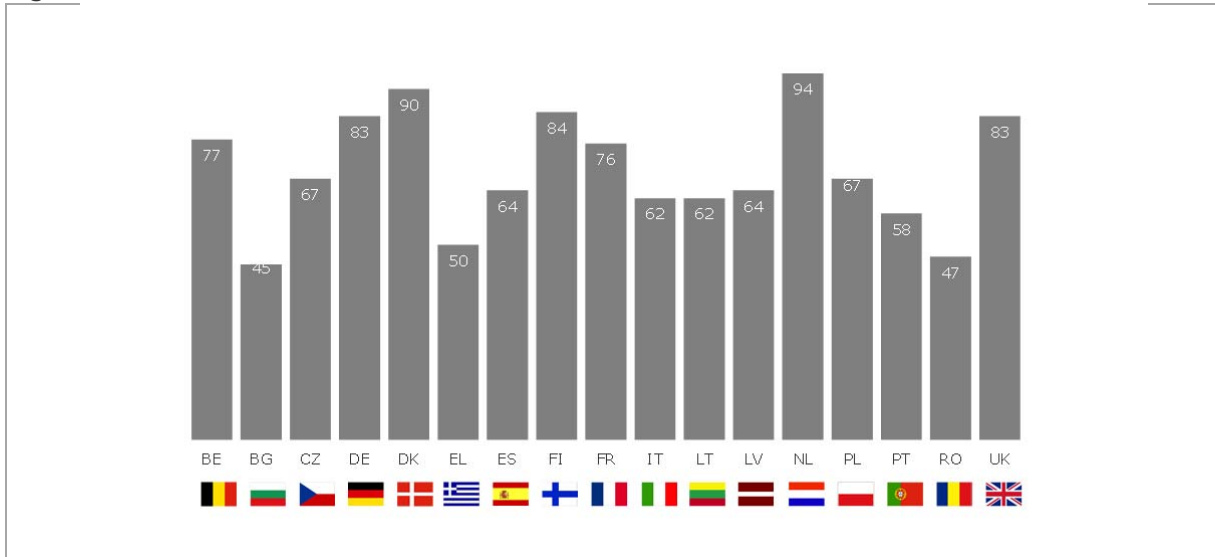
Source: Eurostat (2011)

3. Library and PAC usage

Key points

■ Nearly one in four adults – that is 97.3 million adults across the EU – have used a public library in the last 12 months. Generally speaking those countries with the highest levels of per capita spending on libraries have the highest levels of usage.

■ 13.9 million adults across the EU – or 4% - have used a PAC in the last 12 months. Usage of PACs varied by country and tended to echo patterns of general library usage. Levels were highest in Finland and Denmark; and lowest in Bulgaria, Poland, Portugal, Italy, France, Greece and Germany. PAC usage was highest among young people between the ages of 15 and 24, those still in full-time education, and among those born outside of the EU.

■ The primary motivations for PAC use are the free nature of the service together with the lack of other options that people have. In particular, those who have no other options tend to be socially excluded groups – the Roma, those with a disability, older people aged 55 and over, those not currently employed, and people completing their full-time education at a relatively early age.

■ 4.6 million adults *first* used a computer to access the internet in a public library, highlighting the role that libraries play in setting people on the path to computer usage.

■ The PAC service was highly regarded by users. 92% of PAC users believed the library's computer and internet connection service as 'valuable', and indeed over a third regarded it as 'extremely valuable'. Those in Bulgaria, Portugal, Lithuania, Poland and the UK place a particularly high value on the service. Furthermore 91% of PAC users were either 'very satisfied' or 'satisfied' with the PAC service.

■ The sophistication of ICT services offered by libraries varied across the countries involved, but so did the users' expectations and needs. Thus the highest per capita spending countries offering the most advanced ICT services did not necessarily receive the highest satisfaction ratings from users.

This chapter firstly looks at library usage, and then goes on to examine PAC usage. Since this is the first study of its nature, this chapter therefore presents important benchmark statistics concerning usage across the EU on a consistent basis.

3.1 Public library usage

The omnibus survey, which provides a representative sample of adults aged 15 and over across the 17 EU countries, provides basic information on library usage and PAC usage. This information gives a context to the main findings from the in-library surveys of library users and PAC users. The chart overleaf presents the results for all seventeen countries included in the study. Note that in this chart – and throughout this report – the 'total' column provides the overall average results for the seventeen countries, weighted in proportion to the population sizes of the various countries. **As the survey covered 17 of the EU countries and more than 90% of the EU population**, the 'total' can be regarded as a proxy for an EU-wide average.**

Figure 3.1: % of adults who have used a public library in the last 12 months/last month
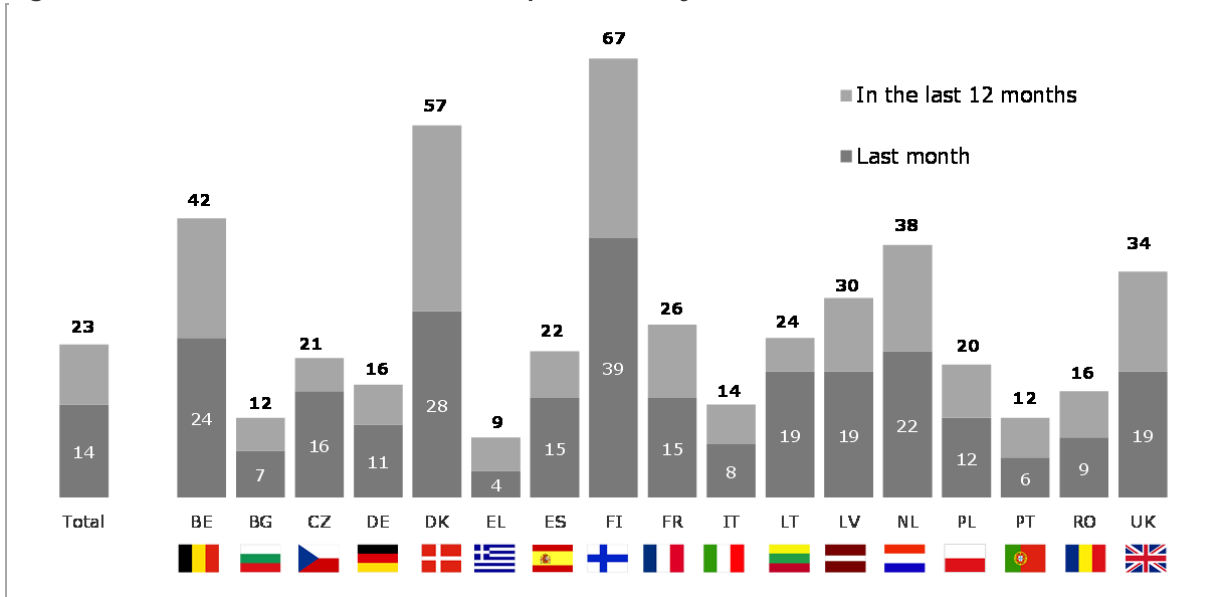
Source: Omnibus survey - Q1. Have you visited a public library in the last 12 months? Q2 – How often have you visited a public library in the last 12 months?
Base: All adults - Total (17816); BE (1018); BG (1043); CZ (986); DE (1026); DK (1045); EL (1000); ES (1000); FI (1008); FR (1006); IT (1016); LT (1106); LV (1091); NL (1004); PL (1000); PT (1261); RO (1117); UK (1089)

The survey found that overall nearly one in four adults (23%) had used a public library in the last 12 months. This means that around 97.3 million adults across the 28 countries of the EU have used a public library in the last 12 months.

Library usage varied very considerably from country to country. Those living in the two Scandinavian countries included within the study (Finland and Denmark) had by far the highest levels of usage, at 67% and 57% respectively[10]. Belgium, the Netherlands and the UK also recorded relatively high levels of usage, at more than a third of adults. At the other end of the scale usage was lower in many of the Southern and Eastern European countries - specifically in Greece (9%), Portugal (12%), Bulgaria (12%), Italy (14%) and Romania (16%). It was also relatively low in Germany (16%), which is clearly out of line with other Western European countries such as the UK, France and the Netherlands. This may (in part at least) be a reflection of the relatively low per capita spend on libraries that exists in Germany.

A comparison of information on spending on public libraries (see Figure 2.2) with the usage of libraries (Figure 3.1) shows that there is a clear link between the two. **Generally speaking, those countries with the higher per capita spending on libraries have the highest levels of usage**.

While the survey does not attempt to explain *why* usage varies so much from country to country, the fact that it is so much higher in some countries means library impact will inevitably at least in part be determined by this key measure. Put another way, if impact is to be increased in some countries, this will inevitably mean that more people need to be attracted to libraries.

In terms of other factors it is clear that:

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[10] Levels of library usage in Finland and Denmark were similar to those reported in the US, in a recent study by the Pew Centre, funded by the Bill and Melinda Gates foundation. Zickuhr, K, Rainie, L and Purcell, K: *Library Services in the Digital Age.* http://libraries.pewinternet.org/2013/01/22/Library-services/

- Women (26% visited a library in the last 12 months) are more likely than men (19%) to have visited a library in the last 12 months.
- Library usage declines very substantially with age. Young people between the ages of 15 and 24 (38%) are very strongly represented among library users. However, among those over the age of 65, library usage is much lower at 14%.
- Reflecting the variation in usage by age, library usage is very strongly linked to people who are still in full-time education. 48% of this group had visited a library in the last 12 months. It is also linked to those with higher levels of terminal education – 33% of those who had completed their education aged 20 or over had visited a library in the last 12 months.
- Library usage is slightly higher in large towns and cities (27%) than in smaller towns (22%) or villages/rural areas (21%).
- It is also linked to those who were born outside of the EU – 37% of those in this group had used a library in the last 12 months.

Another measure of usage is based on the *last month*, where the survey found that 14% of EU adults had used a library during this period. There was some variation between countries in terms of the ratio between library usage in the last 12 months and in the last month. In some countries, such as Lithuania, the Czech Republic and Spain, there was a close relationship between last 12 month usage and last month usage – implying that library users tended to visit the library fairly regularly. In other countries, such as Denmark, Romania and Portugal, there was less of a relationship between the two measures – implying that visitors tended to visit less frequently.

3.2 PAC usage

Fourteen per cent of those who had visited a library in the last 12 months had used a PAC (see Figure 3.2), implying that a very significant minority of library users make use of the PAC facilities, aside from the other more 'traditional' facilities such as borrowing books and reading newspapers. The proportion of library users in each country who also used a PAC was at its highest in Lithuania, Latvia, Finland, Denmark and the UK.

Interestingly, when those who had *not* used a PAC were asked why this was, 5% of this group indicated that they did not use PACs because they did not know how to use computers, implying that there is potential for libraries to increase their customer base and help further spread the word concerning the benefits of ICT. Note that in Bulgaria, Latvia and Lithuania much higher proportions of non-PAC users – between 13% and 16% - indicated that they did not know how to use computers/the internet, highlighting the very major opportunity in these countries. Furthermore, 7% of non-users stated that they did not use PACs because they had nothing to do on computers – again this is a potential opportunity for libraries, particularly in Greece and the Eastern European countries.

Figure 3.2: % of those using a library who have used a PAC in the last 12 months
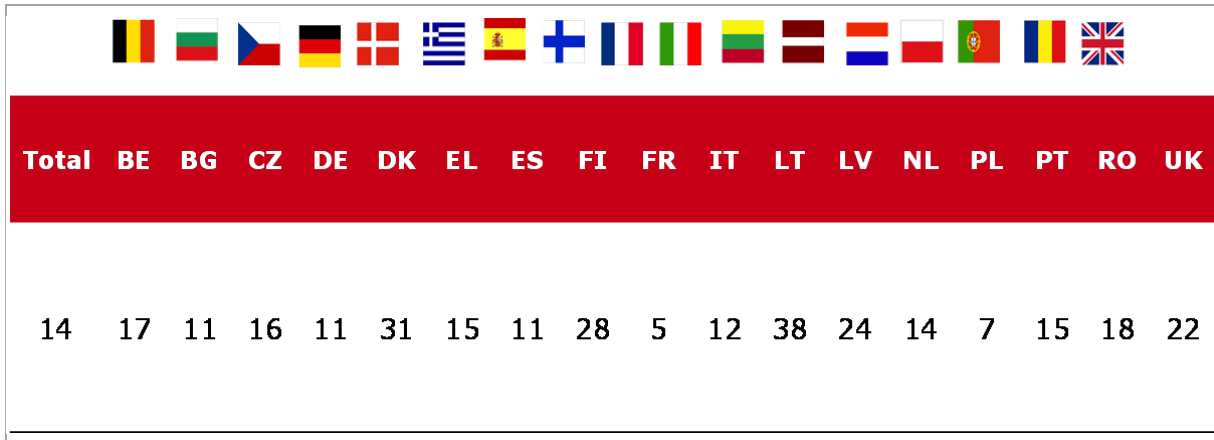
Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
14	17	11	16	11	31	15	11	28	5	12	38	24	14	7	15	18	22

Source: Omnibus survey – Q4. In which of these places have you used a computer connected to the Internet in the last 12 months?
Base: All library users - Total (4739)

In total, the survey found that 13.9 million adults across the EU – or 4% of all EU adults - have used a PAC in the last 12 months. The following chart provides estimates of the proportion of all adults in each country who are PAC users (as shown by the bars) together with estimates of the actual numbers in each country.

Figure 3.3: % and estimate of number of adults who have used a PAC in the last 12 months
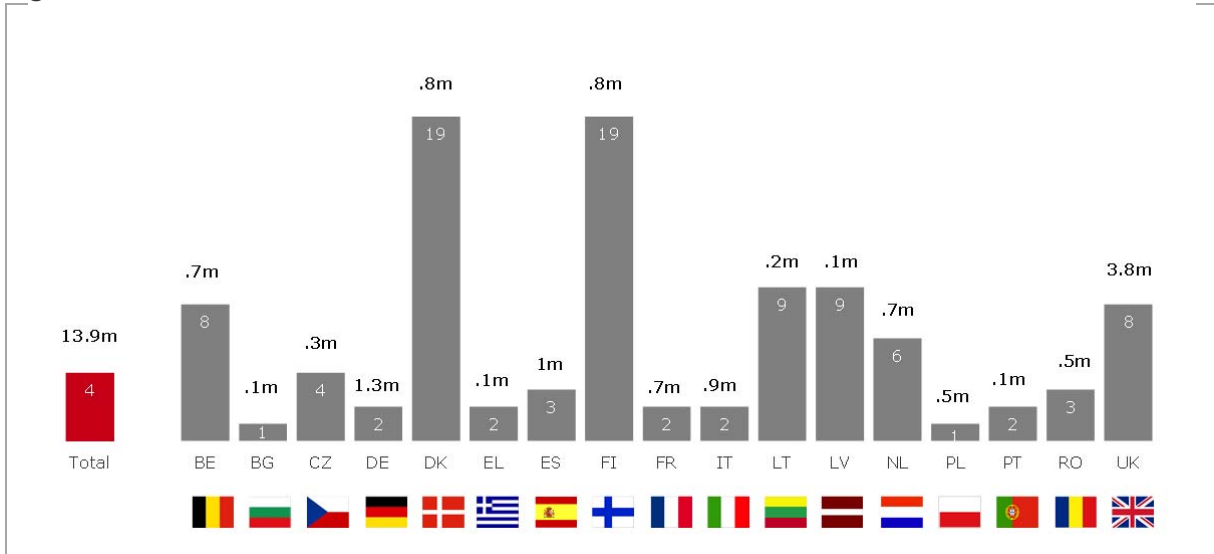
Source: Omnibus survey- Q4. In which of these places have you used a computer connected to the internet in the last 12 months?
Base: All adults - Total (17816); BE (1018); BG (1043); CZ (986); DE (1026); DK (1045); EL (1000); ES (1000); FI (1008); FR (1006); IT (1016); LT (1106); LV (1091); NL (1004); PL (1000); PT (1261); RO (1117); UK (1089)

Usage varied considerably by country, and tended to echo those observed for patterns of usage of public libraries, reported above.

■   Thus in Finland (19% - c.0.9 million adults) and Denmark (19% - c.0.8 million adults) nearly one in five adults had used a PAC in the last 12 months, the highest levels observed: interestingly

these are also two of the countries with the highest access to the internet at home, as shown in the previous chapter.

■ In the UK (8% - c.4.3 million adults), Belgium (8% - c.0.7 million adults), Latvia (9% - c.0.1 million adults), Lithuania (9% - c.0.2 million adults) and the Netherlands (6% - c.0.8 million adults), the proportions were also relatively high.

■ In all other countries covered by the study, between 1% and 4% of adults had used a PAC in the last 12 months.

In terms of other demographics, **reflecting patterns of general library usage that we have already seen**, **PAC usage was highest among young people between the ages of 15 and 24**. 9% of this group had used a PAC in the last 12 months, declining to just 1% of those aged 65 and over. In a similar way, it was strongly associated with whether or not the respondent was still in full-time education: 12% of this group had used a PAC, falling to 5% among those who completed their education aged 20 and over, and then to just 2% of those who completed their full-time education at an earlier age. So as one might expect, libraries are particularly attractive to young people (many of whom will still be in full-time education), and this is also the case for PACs.

Despite this trend towards younger users, however, library managers in the qualitative research rarely seemed to recognise older people as a 'hard to reach' group. A variety of initiatives had been launched across the countries involved to encourage older people to use libraries and PACs (such as dedicated training courses, linking ICT use to topics that older people are interested in and taking laptops out into the community to access those who cannot get to a library), but in most countries older people were seen as having a relatively high interest in learning about ICT already, and therefore seen as a relatively 'easy audience'.

PACs are also particularly likely to be used by those who are **not currently employed** (7% of this group had used a PAC in the last 12 months). This clearly links to the popularity of PACs amongst those who are still in full-time education; it also tallies with numerous reports from library managers in the qualitative research that people on low incomes and the unemployed are well represented among library users, and make good use of the free ICT that libraries provide.

> *"Many used to have internet at home, now they don't because they can't afford paying for it. Therefore, they come here." (Senior manager, urban, Greece)*

PACs also appear to be particularly attractive to minority groups, who through a combination of economic and linguistic reasons are often 'digitally excluded'. Thus 7% of those whose country of birth was outside of the EU indicated that they had used a PAC in the last 12 months, compared to 3% of those whose country of birth was within the EU.

In the qualitative research, library managers expressed varied views as to whether ethnic minority groups constitute a 'hard to reach' group, and should be targeted with specific support or encouragement to use PACs. Some held that ethnic minorities are integrated into the community, already use libraries and are not in sufficient numbers to require special attention. In a similar vein, there was also a belief that if a person is able to speak the local language, then accessing ICT services at public libraries should not be a challenge.

There were some examples of special initiatives that had been directed at ethnic minorities, but most did not report anything:

- Organised training, information or ICT support in the native languages of the members of ethnic minorities. (Lithuania, Finland, Sweden)
- Training courses to help ethnic minorities learn the language of the country that they now live in, for example through e-Learning opportunities at the library and partnerships with associations which specialise in teaching domestic languages to immigrants. (Germany, France, Sweden)
- Assisting the parents of children who come to use the library. (Germany, Denmark)

> *"The groups we find hardest to reach out to are people from ethnic minorities and refugees, largely because they do not have the courage to get in touch with us. To reach out to them we work with associations that teach Swedish for immigrants, have information in multiple languages, drop-in evenings, etc. But we have not completely succeeded." (Senior manager, urban, Sweden)*

Having said this, not speaking the local language was an unaddressed barrier for some ethnic minorities in Romania in that the PACs' Windows operating system was in Romanian, and library staff were not able to offer them support in their native language. Hungarians and Germans in Romania were said to inhabit close groups and to prefer to visit ethnic community libraries, partly due to this linguistic barrier, making them hard for mainstream libraries to reach. This situation was not mentioned in other countries, but it may well be an issue in libraries outside the qualitative sample.

Attitudes to **Roma users**[11] in particular were varied. Some library managers in Romania, Bulgaria and Lithuania reported heavy use of libraries by the Roma community, and felt Roma users come to the library at their own initiative and therefore do not need to be encouraged, while others held that Roma do not really use the library and there has been no initiative to encourage them.

> *"Oh, the Roma are very active. You cannot draw them away from the computer." (Senior Library Manager, Semi-rural, Lithuania).*

Equally, some managers and users reported that Roma use PACs in the same way as people from other communities, while others claimed that Roma users do not adhere to the same 'rules' as other users, and that this can create problems in libraries. Examples they gave included creating 'disturbances', insisting on using computers outside the permitted time interval, and using the computers only for entertainment (games, socialising, etc.) rather than for 'serious' issues like searching for a job. Such claims are of course based on individuals' experiences, but they were not made for users from other communities.

In terms of gender, while libraries were more likely to be used by women than men, PACs were equally likely to be used by both men and women.

Appendix B of this report presents a demographic profile of library and PAC users.

In terms of frequency of use, **PAC usage is**, **in the main**, **a relatively infrequent activity, with half of users doing so just once every three months or less often**. However, 20% of PAC users made use of PACs at least once a week and 27% once to three times a month. The most frequent PAC users were in Eastern and Southern European countries - Latvia, Lithuania, Romania and Spain. The least frequent PAC users were in Denmark and Finland, despite the fact that these two countries actually had the highest prevalence of PAC usage (and linked to this, the highest level of library usage).

In terms of demographic groups, it is notable that:

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[11] 0.3% of library users across the EU are from the Roma community, rising to 0.4% among PAC users

- PAC users from the Roma community were remarkably regular users – a massive 60% of Roma PAC users did so at least once a week.
- PAC users from ethnic minority groups (33%) and migrants (31%) also tend to be regular users of PACs.
- Men tend to be more regular users of PACs than are women.
- PAC users who finished full-time education relatively early (aged 15 or under) tend to be more regular users of PACs than do those who stayed in full-time education for longer.

The survey further found that about 4.6 million (or 1%) of all adults had *first* used a computer to access the internet in a public library. While this is clearly much, much lower than in locations such as home (44%), a friend's/family's house (9%), work (8%), or school/college/university (7%), it does still represent a very significant number of people across Europe who are having their first online experience in libraries, which will then (hopefully) place them on a path towards ICT literacy and regular usage. There was little variation by country in regarding the percentage of adults who had their first taste of the internet in libraries.

In terms of the profile of those who had first used the internet at a library, compared with the EU population, those who had first used the internet at a library were more likely to be female (58% vs. 51%), less likely to live in a rural area (23% vs. 31%), more likely to be between 25 and 39 (34% vs. 24%) and have finished their studies above the age of 20 (38% vs. 26%).

3.3 Reasons for using PACs

PAC users interviewed in the in-library survey were asked what their main reasons were for using computers, the internet and software in public libraries within the last 12 months. **It is clear that the primary motivations for PAC users are the free nature of the service together with the lack of other options that people have**, **which has clear implications for the need to ensure the continued provision of the library PAC service**, **particularly in these challenging economic times**. Other, less commonly cited reasons include the need to work or be with other people (12%), the speed of the internet when compared with what respondents have available elsewhere (8%), the assistance offered by library staff 7%), and the quality of the PAC hardware/software when compared to what they have at home or work (5%).

At a country level, motivations appear to vary somewhat, with the free nature of the service being most commonly quoted in Greece, Lithuania, Romania and Portugal, and seemingly less of a factor in many of the richer countries - Italy, the Netherlands, Finland and Denmark.

Figure 3.4: Main reasons for using PACs in libraries

%	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Free Internet access	33	37	35	33	24	30	64	42	24	41	17	53	43	18	48	50	51	34
No other option for computer access	19	18	16	19	20	14	10	12	19	19	22	21	22	13	12	26	10	25
No other option for Internet access	19	31	19	18	15	18	9	19	16	27	27	18	36	16	17	33	8	16
To work or be with friends or other people	12	21	18	12	8	11	29	9	5	18	10	19	12	15	10	15	28	9
Faster Internet than at home or work	8	5	15	8	6	8	16	9	8	7	8	12	12	7	13	6	12	7
To get help from library staff	7	8	22	10	6	16	16	7	8	9	7	14	8	1	9	4	20	3
Better computer hardware/software than at home or work	5	6	6	4	4	8	8	6	10	6	3	12	9	5	5	1	5	4

Source: Library survey - C8. What are the main reasons you have chosen to use computers, Internet and software at public libraries in the last 12 months?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

These findings were borne out in the qualitative research, where the reasons for using PACs were explored unprompted. Free or better quality access to computers and the internet were the most common and important reasons given; other attractions included the availability of support and advice from library staff, the convenience of other library facilities and the library location, the quiet library environment, and the opportunity to be with other people and reduce social isolation. There was no clear pattern to these findings, with all reasons being cited in countries across the EU.

> *"I think it is perfect. My fear of using a computer releases, and knowing that there is support available makes me feel calm." (User, female, Sweden)*

PAC users in the survey were also asked two more direct questions as to what other options they had, firstly regarding where else they could access the internet from, and secondly, where else they could access the internet *'for free'.* **11% of PAC users – or about 1.5 million adults across Europe - indicated that they had no other options for accessing the internet**, and a further **14% - or about 1.9 million adults – claimed that there was no other source of *free* internet for them (in total 25%).**

In the UK, Czech Republic and Belgium relatively high proportions claimed that there was not an alternative source of the internet that they could access. In Lithuania and Bulgaria particularly high proportions indicated that there was no other *free* source of the internet (see Figure 3.5).

So while the majority of PAC users do clearly have other options for accessing the internet, there is a significant 'core' for whom there do not appear to be any other options. **Perhaps even more**

importantly, **those who indicated that they had no other options for accessing the internet tended often tended to come from 'digitally excluded' groups**, **which clearly highlights the role of PACs in the future of the EU's 2020 Growth Strategy**. Specifically, the following groups were particularly likely to indicate that they did not have any other options:

- Members of the Roma community – 27% of Roma PAC users indicated that they had no other option, compared to 11% of all PAC users.
- 30% of those with a disability had no other option, again compared to 11% of PAC users.
- Older members of the population – 18% of PAC users aged 55 – 64 and 28% of those aged 65 and over had no other option.
- Those not currently employed – 14% PAC users from this group had no other option.
- Those who finished their full-time education at a relatively young age. 33% of PAC users who completed their full-time education aged 15 or under had no other option.

Figure 3.5: Other places the internet can be accessed/accessed 'for free'
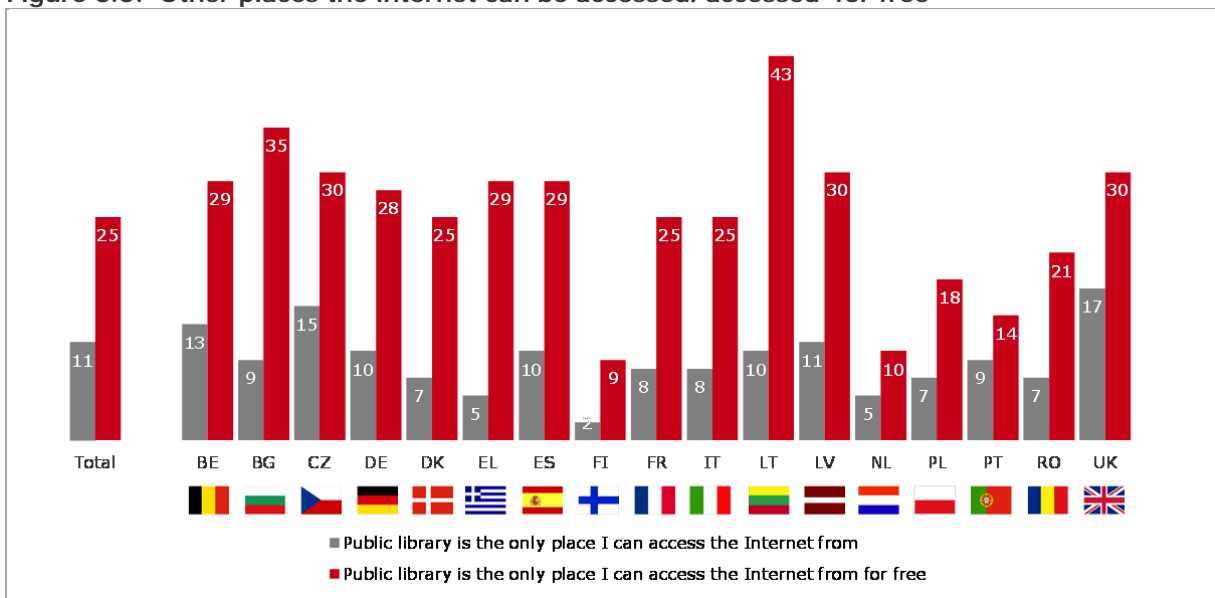
Source: Library survey-C13. Other than at public libraries, where else can you access the Internet from? C14. Other than at public libraries, where else can you access the Internet for free?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

3.4 PAC users' perceptions of PACs

Given the free nature of the service and what we have seen regarding lack of alternatives for some, it is perhaps not surprising to see that PAC users place a high value on the service. **Overall**, **92% of users regarded the library's computer and internet connection service as valuable**, with most opting for either extremely valuable (36%) or very valuable (34%) in preference to fairly valuable (22%). The position was similar across all countries, although the evidence suggests that those in Bulgaria, Portugal, Lithuania, Poland and the UK place a particularly high value on the service, while those in Germany, and Italy perceive it to be less valuable.

Figure 3.6: Value placed on PACs by users
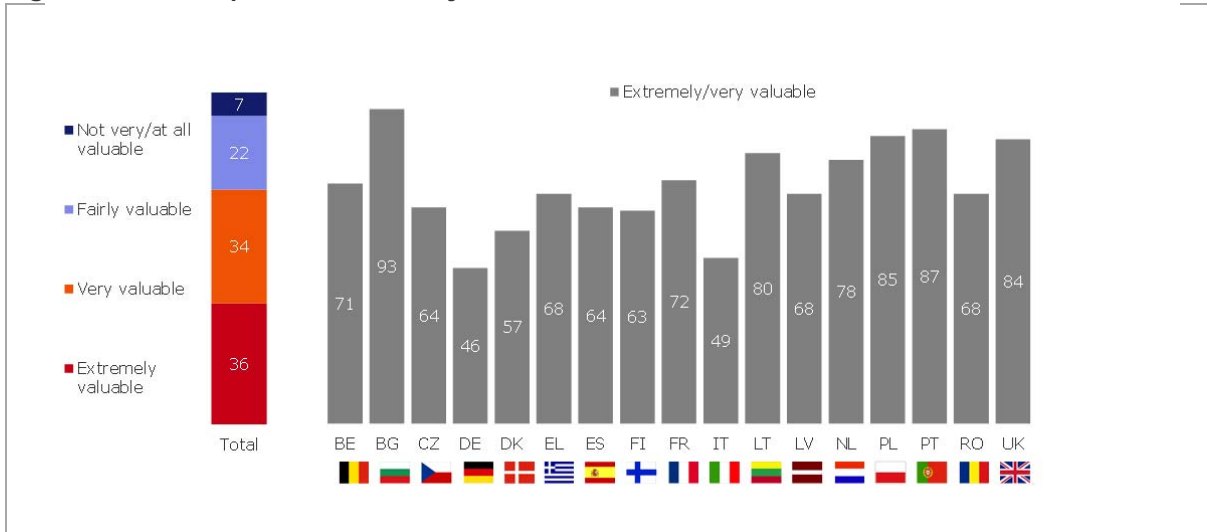
Source: Library survey - C30. How much do you value the library's computers and Internet connection?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703); EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

In terms of sub-groups, while there is not a huge difference between the value that different groups place of PACs, it is clear that the following groups felt that PACs were particularly valuable, again linking in at least in part to those groups who are traditionally 'digitally excluded'.

- Those who finished their full-time education at aged 15 and under (83% felt that PACs were either extremely or very valuable)
- Those who were born outside of the EU (79% extremely/very valuable)
- Ethnic minorities (84% extremely/very valuable)

Similarly, satisfaction with computers and the internet at public libraries was high among users: 91% of users were either 'very satisfied' or 'satisfied', with just 6% opting for 'neither satisfied nor dissatisfied' and 2% expressing dissatisfaction. Consistent with some other measures, satisfaction was at its highest in Bulgaria, Latvia, Poland, Romania and the UK. Satisfaction was markedly lower in Germany, and also, to some extent, in Italy: this was also the case on the perceived value of the PAC service, referred to above. As discussed below, levels of per capita spending appear to be linked to levels of satisfaction in some countries, but users' levels of expectation and need also seem to have an influence on their satisfaction in other countries.

In the main all demographic groups were equally satisfied with computers and the internet at libraries. There is however one exception to this, as there is an indication that the Roma were slightly less satisfied than other groups, and so it is possible that despite the importance of this group, libraries do not always manage to meet their needs.

Figure 3.7: Satisfaction with computers and the internet at public libraries

Source: Library survey - C31. How satisfied or dissatisfied are you with your access to computers and the Internet at public libraries?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)
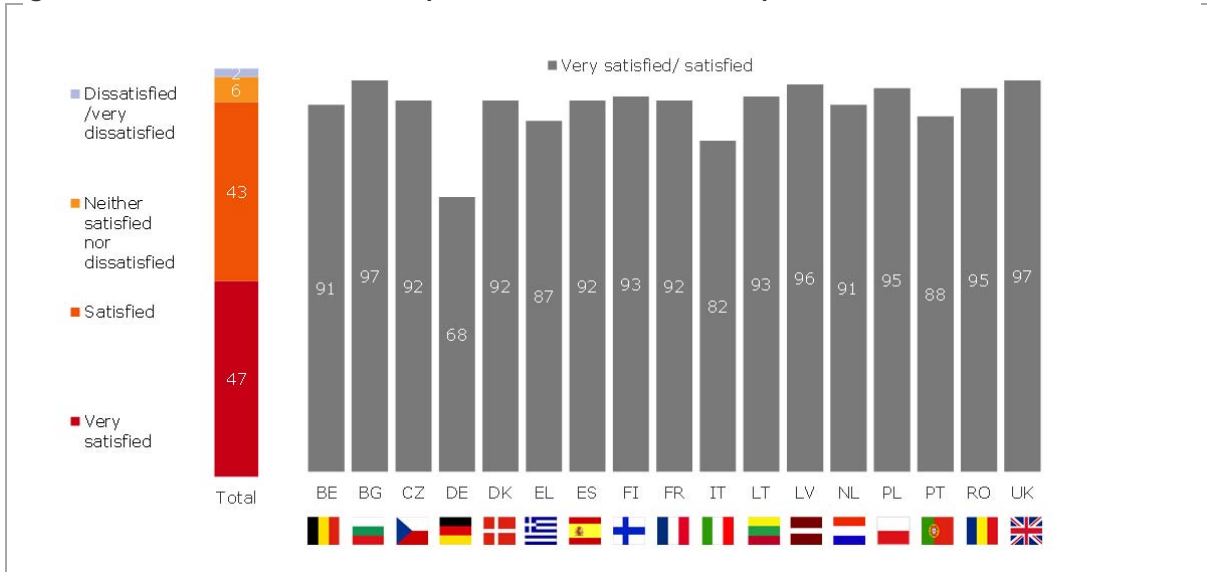
Reflecting this high level of overall satisfaction, nine in ten PAC users have to wait 10 minutes or less in a library to gain access to a computer, with one in ten waiting longer than this.

In the qualitative research, the majority of users saw the ICT hardware, software and internet connections provided by libraries as at least adequate for the purpose that they use it for. **However, it was clear that in most countries the needs of this majority were fairly basic and that the equipment was generally better than what they are able to access elsewhere**. There was also recognition of the fact that these services are provided within budget constraints, and users were often grateful that the service is free.

> "*There is everything I need for simple tasks, e.g. to write something for my studies, find something or print something. To check my emails. Average, usual equipment for using the internet or elementary programmes.*" (User, male, 16-24 years, Lithuania)

This suggests that ICT in libraries generally caters well to those with basic needs and restricted alternative options. There were, however, a number of users with higher needs or expectations who were less satisfied with the ICT services offered. These users were predominantly in countries in which levels of satisfaction were marginally lower (e.g. Belgium, France, Portugal, Germany, Greece). The following are examples of the challenges cited by this minority:

- Not enough computers or computers that need to be replaced/updated. This is especially the case during busier times. (Belgium, Bulgaria, Denmark, France, Greece, Poland, Portugal, Spain)

> "*You can no longer decipher the buttons on the keyboards, it all needs updating!*" (Recent user, male, 40-64 years, France)
>
> "*One thing that I would like…since we are talking about computers…I think that one of the bigger problems is the computers…it really is a Jurassic Park.*" (User, female, 40-64 years, Portugal)

- The time limit posed on the use of computers, for example 30 minutes or an hour. (Belgium, France, Portugal)

> "*One hour is not good enough, when we are starting to write the conclusion time's up. So we decided to go to a cyber-cafe and we use the computer and divided the cost between us.*" *(Recent first time user, male, 16-24 years, Portugal)*

- Lack of availability and malfunctioning of related ICT hardware such as printers, scanners, headphones, webcams, etc. (Belgium, Denmark, Germany, Greece, Lithuania, Romania, Spain)

- Inability to connect a storage device to the computer (such as a USB stick) which makes it impossible to save documents or bring them to the library. (Germany)

- The speed of the internet connection, especially during peak hours / when there are many users. (Czech Republic, Italy, Latvia, France, Greece, Lithuania, Netherlands, Poland, Portugal, Spain)

> "*It is OK for normal browsing or to open documents but it is not suited for downloading and streaming, but these are not allowed.*" *(User, male, 16-24 years, Italy)*
>
> "*General speed is poor. You have to wait for five minutes for YouTube. Then you watch for a while and wait again and the only thing you see is that rotating ball.*" *(User, male, 40-64 years, Lithuania)*
>
> "*I've figured out what to do…I open one website, check everything I need to then I close it before opening the next one…but opening more than one at a time is impossible.*" *(User, male, 25-39 years, Spain)*

- Software not up-to-date or sufficient (Czech Republic, Finland, Greece, Portugal, Finland, Latvia, Sweden)

> "*Not all of the computers in the library have MS Office, some only have Notepad. The library staff advised me on which computers are newer and have the software I need.*" *(User, female, 25–39 years, semi-rural, Czech Republic)*
>
> "*Their operating system requires updating little by little. Vista crashes once in a while. There is too little memory left.*" *(User, male, 25-39 years, Finland)*

- Concerns about the safety of the network, for example when using electronic banking. (Netherlands, Portugal)

Library managers had mixed views about whether the hardware and software work reliably and are sufficiently up-to-date for users' purposes. Some were of the view that what their library offered was at least adequate (Romania, Italy, Lithuania, Germany, Finland, Denmark, Czech Republic, Bulgaria).

> "*When they do not work, it is because they are misused.*" *(Library manager, urban, Italy)*
>
> "*We do our best to secure periodic modernisation of the hardware and the software is also quite up to date, in my opinion.*" *(Senior library manager, semi-rural, Czech Republic)*

Others did not consider their hardware (Portugal, Poland, Spain, Latvia, Greece, France, Belgium, UK) and/or software (Portugal, Greece, UK) up-to-date, in part because of the fast-changing nature of technology and financial constraints that prohibited them from updating sufficiently often. There was also some indication that hardware in urban areas gets more use than in semi-rural areas, and requires replacement more often.

> *"The computers work badly, really badly…the ones we have today are four years old…they need to be replaced urgently." (Library manager, urban, Spain)*
>
> *"Our computers aren't updated, they are ancient…which leads to slow internet access and even when printing….There were people who came here to work with Office and couldn't work because the computers were too slow." (Library manager, urban, Portugal)*
>
> *"It's all normal with us, but, I will say honestly, our computers are terribly old, [working] since the year 2005. And we want younger ones because…they are seven years [old]…They are generally working well, but, if we have any problems, we call a specialist who repairs [them]." (Library manager, urban, Latvia)*

Judging by the accounts of library managers, urban libraries in the Nordic countries in the qualitative sample (Finland, Denmark and Sweden) offered the most sophisticated technology and services. These countries, among the highest per capita spenders on libraries, offered tablets, Macs, e-readers, facilities to record and mix music (Finland), and fast, reliable broadband. However, even in these countries, many users' expectations were said to outstrip what libraries were able to offer, and there was a sense among managers that libraries are always 'behind the curve'.

Comparison between the accounts of library managers and users in the same countries reveals broad agreement about the quality of the ICT offered, but also some discrepancies, with some managers 'overestimating' the number of working/fully functioning computers in the library, whether there were enough computers to cater for users' needs (based on users' experiences), and the adequacy of the speed of the internet connection. Conversely, in the UK for example, library managers were more conscious of the need for updated hardware/software than users, who, on the whole, had relatively low expectations.

It is also noteworthy that while some of the countries that received lower satisfaction ratings from users were those with lower levels of per capita spending on libraries (e.g. Germany, Greece, Portugal), others were among the highest spenders (France, Belgium, the Netherlands, Denmark). In these latter countries users seemed more likely to exhibit higher level expectations of and needs from ICT services in libraries.

All this suggests that while there does seem to be variation in the quality of services that libraries across the EU offer, users' satisfaction is also determined by what they expect and need – and these expectations and needs may be higher in some of the higher spending countries, effectively 'cancelling out' the effects of this higher spending.

4. Perceptions of public libraries

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Key points
- Belief in the importance of library provision of free computers and the internet was high among both PAC users and library users in general. Specifically, about seven in ten library users felt that 'free access to computers' and 'free access to the internet' in libraries were either very or extremely important.
- While nearly three in ten respondents felt unable to express a view, the majority of the remainder felt that their library was at least 'fairly effective' in meeting community needs. Moreover, despite the climate of austerity across much of Europe during the fieldwork, 40% of the EU public still felt that public libraries merited more financial support than at present. This was due in part to a view that the free ICT access offered by libraries needs to be maintained and improved as people become less able to afford paid-for access. Only 5% felt that libraries deserved less financial support.

</div>

This chapter explores the perceptions of public libraries in general, including the importance of the various services they provide, whether or not they are felt to meet community needs and the perceived adequacy of their funding. These findings are set across a backdrop of recession and economic gloom across much of Europe.
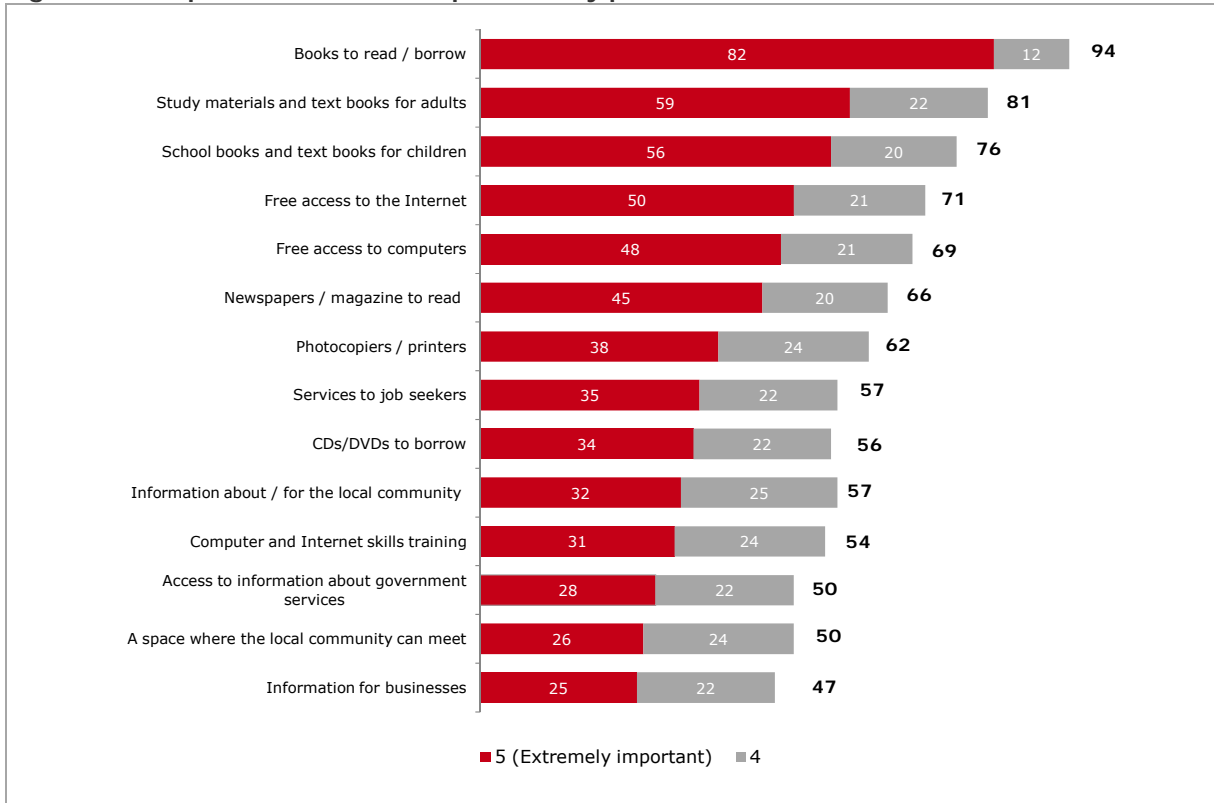
4.1 Importance of services provided by public libraries

Public libraries provide a range of services, and the importance of each of these was tested among library users (both PAC users and non-PAC users) by asking them to rate each of 14 services on a five point scale, ranging from 'extremely important' to 'not at all important'. The chart overleaf shows the percentage rating each service as at least a four on the five point scale, with the proportion giving the service the top priority score of five also indicated.

Not surprisingly, the core service of 'books to read/borrow' was considered the most important, followed by study related materials – 'study materials and text books for adults' and 'school books/text books for children'. Following on from this – rated the fourth and fifth most important services – were 'free access to computers' and 'free access to the internet', both considered to be just slightly more important than 'newspapers/magazines to read' and 'photocopiers/printers'. This finding is perhaps surprising, given that these results are based on a combination of both PAC users and non-users. If the results of the two groups are separated out, 84% of PAC users and 67% of non-PAC users believe that 'free access to computers' is important, and similarly 85% of PAC users and 68% of non-PAC users believe that 'free access to the internet' is important. **Therefore belief in the importance of library provision of free computers and internet is high among both groups**, **although higher among those who actually make use of the service.**

'Computer and internet skills training' was rated as the eleventh most important service out of the 14 specified – just above 'access to information about Government services' and 'a place where the local community can meet'. Interestingly, among both PAC and non-PAC users, the rating was very similar.

Figure 4.1: Importance of services provided by public libraries

Service	5 (Extremely important)	4	Total
Books to read / borrow	82	12	**94**
Study materials and text books for adults	59	22	**81**
School books and text books for children	56	20	**76**
Free access to the Internet	50	21	**71**
Free access to computers	48	21	**69**
Newspapers / magazine to read	45	20	**66**
Photocopiers / printers	38	24	**62**
Services to job seekers	35	22	**57**
CDs/DVDs to borrow	34	22	**56**
Information about / for the local community	32	25	**57**
Computer and Internet skills training	31	24	**54**
Access to information about government services	28	22	**50**
A space where the local community can meet	26	24	**50**
Information for businesses	25	22	**47**

■ 5 (Extremely important) ■ 4

Source: Library survey - C15. How important do you think each service is, on a scale of 1 to 5, where 1 means 'Not at all important' and 5 means 'Extremely important'.
Base: All library users - Total (24253)

Figure 4.2 shows the average ranking (out of 14) given by respondents to three of the PAC related library services, namely: *free access to computers, free access to the internet, and computer* and *internet skills training.* Where the item is ranked as more important than average in a particular country it is highlighted in red; where it is ranked as less important than average it is highlighted in turquoise blue.

Free access to computers is ranked particularly highly (relative to other library services) in Portugal, Greece and Romania – and also in Poland, Belgium, the UK and Bulgaria. Free access to the internet follows a broadly similar pattern – with Greece, Portugal, Romania and Latvia all giving it a high ranking. Computer and internet skills training receives a relatively low ranking in all countries, with the highest ranking being achieved in France, Italy, Czech Republic and the UK.

Figure 4.2: Importance of PAC-related services provided by public libraries (ranking out of 14)

	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Free access to computers	5	4	4	8	7	5	3	5	7	7	5	6	5	5	4	3	4	4
Free access to the internet	4	4	5	6	6	4	2	4	5	6	4	5	2	5	4	1	2	3
Computer and internet training	11	10	8	10	11	12	11	9	12	9	12	9	10	13	11	10	10	8

Source: Library survey - C15. How important do you think each service is, on a scale of 1 to 5, where 1 means 'Not at all important' and 5 means 'Extremely important'.
Base: All library users - Total (24253); BE (1535); BG (1428); CZ (1402); DE (1418); DK (1410) ; EL (1415); ES (1418); FI (1443); FR (1330); IT (1481); NL (1386); LT (1400); LV (1459); PL (1400); PT (1400); RO (1496); UK (1432)

4.2 Effectiveness of public libraries in meeting community needs

In the omnibus survey, a representative sample of the whole adult population across the 17 EU countries was asked to express their view on how effective they felt their local public library was in meeting the needs of their community. Results on this question are somewhat mixed. Firstly, nearly three in ten respondents felt unable to express a view, presumably because they were not familiar with their local library (Indeed we have already seen in chapter 3 that 77% of adults across Europe have not used a library in the last 12 months, and so inevitably a reasonable proportion of this group will feel unable to comment). Among the remainder, the majority felt that their local library was *at least* 'fairly effective' in meeting community needs, with a total of 46% opting for the 'very effective' or 'effective' category. Among library users (rather than the general public) views were far more positive with most (72%) saying that their library was either 'very effective' or 'effective', and very few failing to express an opinion.

On a country basis, results varied quite considerably. The most positive opinions were held in Finland, Denmark, Belgium, Spain, Romania and the Netherlands. Looking at demographic groups, the most positive views were held by young people aged 15 – 24 (71% very effective/quite effective), those in large towns and cities (67%), those still studying (76%) and those born outside of the EU (75**%)**. **There is also clear correlation between library usage and perceptions of library effectiveness of meeting community needs: the general pattern is the higher the level of library usage, the higher the perception that libraries meet community needs.**

Figure 4.3: Effectiveness of public libraries in meeting community needs
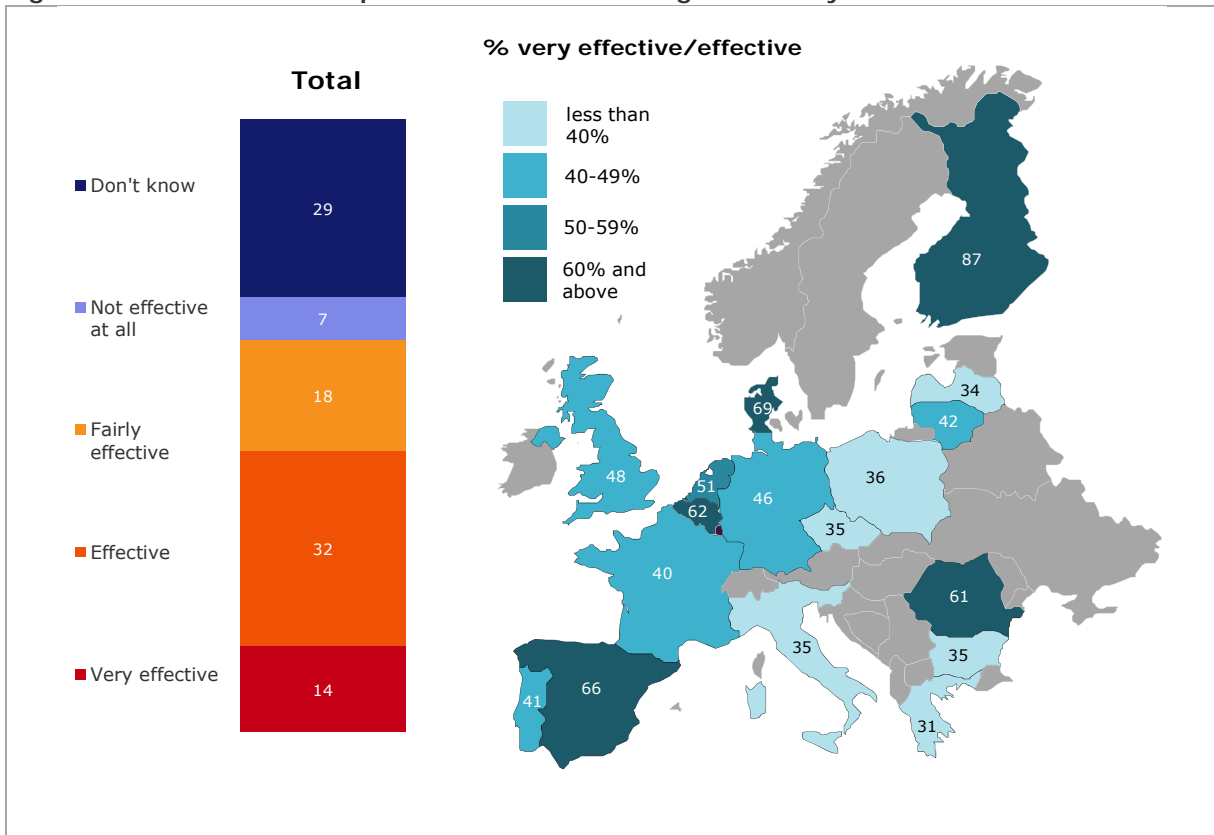
Source: Omnibus survey- Q6. How effective do you think your local public library is at meeting the needs of your community?
Base: All adults - Total (17816); BE (1018); BG (1043); CZ (986); DE (1026); DK (1045); EL (1000); ES (1000); FI (1008); FR (1006); IT (1016); LT (1106); LV (1091); NL (1004); PL (1000); PT (1261); RO (1117); UK (1089)
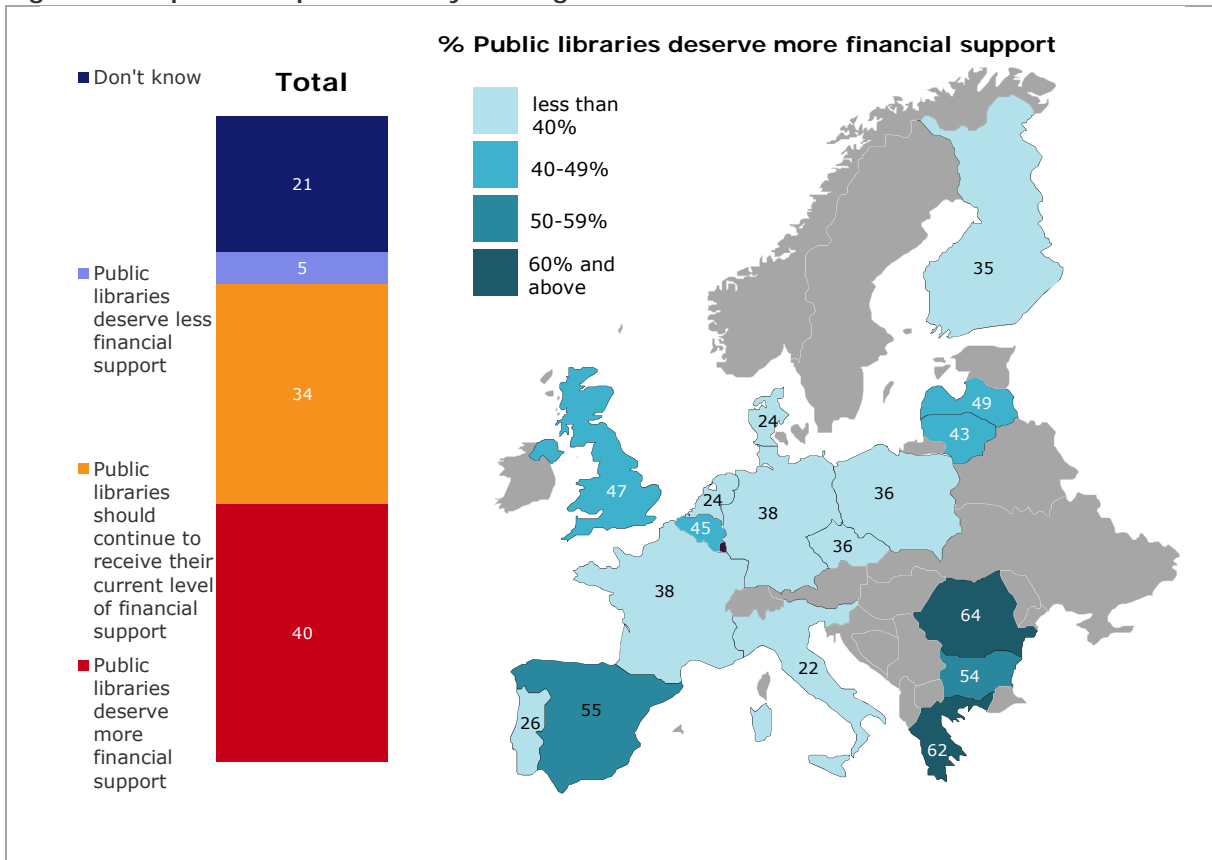
4.3   Funding of public libraries

In addition to the questioning of effectiveness of libraries in meeting community needs, the omnibus sample of the general public was asked for their opinion on the funding of libraries – whether they deserve more financial support, less financial support, or whether it should continue at current levels.

Despite the gloomy economic backdrop which prevailed across much of Europe when the survey was conducted, a substantial proportion (40%) of the public still felt that public libraries merited more financial support than at present, with almost all the remainder either feeling that the funding should continue as at present (34%) or failing to express an opinion (21%). This emphasises the importance that may EU citizens attach to the work done by libraries. Just one in twenty members of the public – 5% - felt that libraries should receive less funding. In line with the findings of libraries' effectiveness in meeting community needs, users (54%) were more likely than non-users (36%) to believe that libraries should receive more financial support.

The greatest call for increased funding of public libraries came from some Southern and Eastern European countries – the Romanians and Greeks, followed by Spaniards and Bulgarians. The lowest levels of support for increased funding came from Italy, the Netherlands, Denmark and Portugal.

Interestingly those with the highest level of education were the most likely to call for greater funding for libraries – 47% of this group gave this view.

Figure 4.4: Opinion on public library funding

Source: Omnibus survey- Q7. Which of the following statements represents most closely your opinion regarding the current funding for public libraries?
Base: All adults - Total (17816); BE (1018); BG (1043); CZ (986); DE (1026); DK (1045); EL (1000); ES (1000); FI (1008); FR (1006); IT (1016); LT (1106); LV (1091); NL (1004); PL (1000); PT (1261); RO (1117); UK (1089)

This strong support for increasing, or at least maintaining, funding for ICT in public libraries was also manifest in the qualitative research, among both managers and users. Across most countries, the reasons given for this support were twofold. First, there was widespread feeling that libraries' current ICT provision needs to be updated (or will need updating soon), given that technologies and people's needs will continue to advance. The second, and perhaps more significant, argument involves the very economic situation which puts library funding at risk. It was argued by many managers and users that tightening domestic budgets increasingly presents barriers to users accessing ICT at home or in paid-for locations (with those who benefit from basic access to ICT the most, such as older users and the unemployed, being particularly likely to be excluded), and that this makes it all the more important that the free service offered by libraries is maintained. **Managers and users believed that the digital divide between those who could and could not afford to access ICT would widen if libraries were not able to bridge it effectively.**

> *"We know that in this national situation the first thing that people give up is internet access. And where are they going to look for it? In public libraries! So we need to have services that can respond to users' needs."* (Senior library manager, semi-rural, Portugal)
>
> *"Funding should be increased in order to strengthen the democracy and the equality of the citizens, to stop exclusion."* (User, female, 40-64 years, Finland)

> *"It's incredibly important to have more funding. We should be able to make software available to all, and that is a bit more expensive. For example, personal creativity software that you do not have access to home is important. And if you have economical problems it may be expensive to have the broadband at home. It is then the libraries have a responsibility to make this possible: we must make ourselves transparent and user-friendly." (Senior manager, urban, Sweden)*
>
> *"Of course funding for ICT should be increased, we have three computers for the public and that's it. We don't have the money to do anything else, that's why we are facing this horrible situation. We are in 2012 and we just offer three old computers, come on…" (Library manager, urban, Greece)*

There was a general belief that increasing funding for ICT in public libraries would benefit the local area served by a library, and the country and economy as a whole, by creating a more informed and educated citizenry, making it easier for people to perform everyday tasks, contributing to lifelong learning, promoting social inclusion, and increasing people's opportunities to gain employment or access better work opportunities. These themes were cited as justifications for increased funding, and are explored in greater detail in the sections which follow.

> *"I think that it works as self-propelled mechanism. For example, the more people who do online shopping, the greater [the] sales… The more educated and open-minded [the] person, the more things he or she buys or organises. The better we are educated, the faster we will develop." (User, male, urban, Poland)*
>
> *"The impact is very important because when people are more educated they have access to technology, for sure they will also have a better life, or at least they will try to find solutions for a better life, for increasing the quality of life, personal satisfaction: 'I am more educated, I have more self confidence, I have access to information and I can have a healthier life - I know where to find information and I can continue developing myself.'" (Senior library manager, urban, Romania)*

Managers and users across the countries involved also agreed on the general areas in which funding should be prioritised: hardware (more and better computers); human resources (including training of existing staff); peripherals and accessories (more printers, scanners, webcams etc); and training for users (more resources to offer informal training, more publicity of training, and more structured training sessions).

5. Informal and non-formal learning

> *Key points*
> - The survey provides evidence of very widespread informal learning activity in libraries, which contributes significantly to the EU's agenda on informal and non-formal learning, particularly concerning *inclusive* delivery About 24 million adults across the EU (one in four library users) have taken part in informal learning activities in libraries in the last 12 months: and around 2.3 million adults have attended a computer training class in a library. In particular, those aged 65 and over; those from rural areas; and the Roma and ethnic minorities are the most likely to have participated in informal learning.
> - Library managers' reports indicate that users' need for training and support is a stronger driver of attendance of courses than marketing and publicity activities carried out by libraries.
> - About half of those who had used a PAC reported that they had been shown or helped to do something by a member of library staff in the last 12 months.

Informal and non-formal learning are being increasingly recognised in EU policies. The flagship initiatives "Agenda for New Skills and Jobs"[12], "Youth on the Move"[13] and "European Platform Against Poverty and Exclusion"[14] all support the considerable added value of non-formal (education that does not lead to a formal qualification) and informal (for example one-to-one advice delivered on an ad hoc basis) learning within the context of lifelong learning and employment policy. The European Commission intends to develop official EU-wide guidance recognising the value of non-formal and informal learning, particularly in relation to raising skill levels for young people, the unemployed and disadvantaged communities.

Public libraries are key players in the delivery of the non-formal/informal component of the European Commission's lifelong learning policy, particularly with regard to *inclusive* delivery. They provide a range of non-formal/informal learning opportunities, such as workshops, lectures and laboratory exercises. They also provide services to support formal learning and homework, language courses, story-telling and reading clubs for children and adults, support to job seekers and business information.

Note that throughout this chapter the term 'informal learning' is used to cover both informal learning and non-formal learning, despite the fact that the two forms of learning have distinct definitions within the EU[15].

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[12] *Mount, D. (2012),* An Analysis of the Relevance of the EU 2020 Growth Strategy to European Public Libraries, Brussels: Civic Agenda European Unit, p.75. [Unpublished guidance document prepared for Global Libraries.]

[13] Ibid, p.67

[14] Ibid p.99

[15] Definitions used by the EU are as follows:

Non-formal learning takes place in a structured/organised context with specific learning objectives and some form of learning support (e.g. a computer class in a library) but does not lead to a recognised qualification or certification. **Informal learning** takes place in an unplanned or ad hoc context, potentially in any arena (work, home, leisure activity etc). This would cover activities like one-off assistance from a librarian in relation to an enquiry – or even just browsing online or offline resources in a public library (where this potentially contributes to enhancing knowledge and by extension skills). Like non-formal learning, informal learning does not generally lead to a recognised qualification or certification.

5.1 Participation in informal learning activities

The role of libraries in providing education to users was explored through asking all library users whether or not they had taken part in any educational activities within the last 12 months. **Overall**, **one in four library users had done so – or approximately 24 million adults across the EU**, which powerfully illustrates the role that libraries have in contributing to EU policy objectives on informal learning. There were dramatically different results for the individual countries. At one end of the scale three in four of those in Lithuania had participated in informal learning, and half of those in Romania. In the UK and Poland, however, just 14% and 13% respectively had done so. So participation in informal learning appears to be particularly common in some (but not all) Eastern European countries (as few in Poland have participated), and as a general statement, is less common in Western European countries.

Figure 5.1: Informal learning activities carried out in the last 12 months
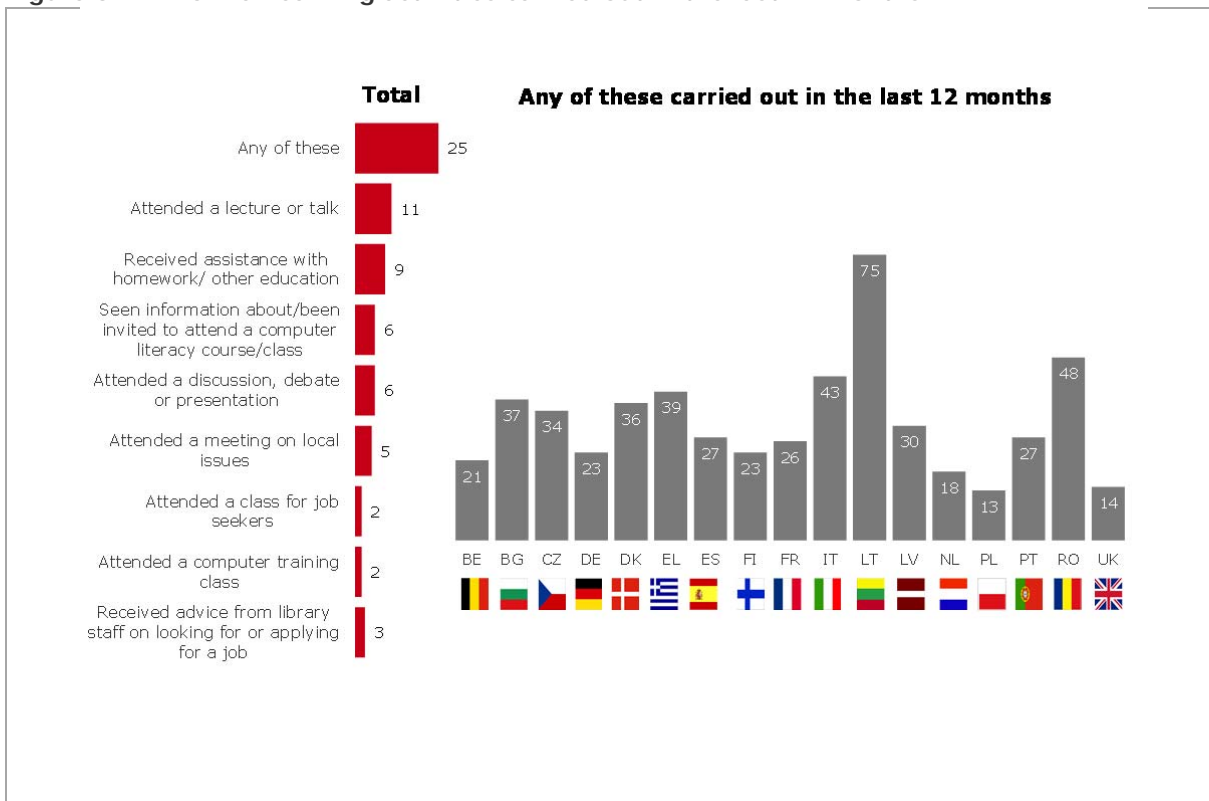
Source: Library survey-C16 (L9). In the last 12 months have you done any of the following things in a public library? Base: All library users - Total (24253); BE (1535); BG (1428); CZ (1402); DE (1418); DK (1410) ; EL (1415); ES (1418); FI (1443); FR (1330); IT (1481); NL (1386); LT (1400); LV (1459); PL (1400); PT (1400); RO (1496); UK (1432)

Reports from library managers in the qualitative research suggest that library users' need for free ICT and support is a stronger driver of demand for informal learning services than any activities undertaken by libraries in terms of marketing and publicising these services. Managers in the UK, Poland, Belgium, Denmark and the Netherlands reported relatively high levels of activity aimed at publicising ICT services and attracting people into libraries; yet all these countries had relatively low levels of take-up of informal learning services. Conversely, Lithuania, Spain and Greece had relatively high levels of take-up, and yet managers reported low or near non-existent levels of marketing activity, largely as they felt their services were already at capacity, and that the benefits of ICT in public libraries are obvious to people and do not need to be publicised.

The most common ways in which library users engage in informal learning in libraries were through attending a lecture or talk (11% of all library users – or c.11 million adults across Europe), receiving assistance with homework or other education (9% or c.9.1 million adults), attending a discussion, debate or presentation (6% or c.6 million adults) and seeing information about or being invited to attend a computer literacy course or class (6% or c.5.7 million adults).

Around 2.3 million adults across the EU or 2% of all library users claimed to have attended a computer training class in the last 12 months – rising to 6% among PAC users.   Particularly high proportions in Romania, Lithuania and Italy had attended.

Qualitative research with users revealed that most of those who had attended a computer training class had been satisfied with it – in particular, they appreciated working in small groups, the personal approach, the slow teaching pace, and the ability to do the course more than once as a 'refresher'. Types of training they had attended included:

- Introduction to the computer. (Denmark, France, Italy, Lithuania, Latvia, Poland, Portugal, Czech Republic, UK, Sweden)
- Introduction to the internet – what the internet is, its potential, the basics of internet searching, how to find useful information, etc.(Denmark, Finland, France, Lithuania, Latvia, Portugal, Czech Republic, UK, Sweden)
- Digital photography / photo editing. (Netherland, Poland, Czech Republic, Finland, UK)
- How to use Facebook / social media training. (Finland, Netherlands, Sweden)
- How to start a blog (Sweden)
- MS Office, e.g. how to write text, simple formatting, etc. (Lithuania, Czech Republic, UK)
- Training on electronic banking. (Lithuania, Poland, UK, Sweden)
- How to use Google. (Denmark)
- How to use Skype. (Sweden)
- Tax registration and information. (Denmark)
- Searching techniques and e-resources. (Denmark, UK)
- Format conversions. (Finland)
- Using graphic design software. (France)
- How to draft a CV. (France, UK)
- Introductory workshop into editing videos. (France)
- Introductory workshop into audio software. (France)
- Training on digital safety – how to use internet searching in a safe way and how to protect children from harmful sites – organised with the help of an outside company. (Poland, Sweden)
- Language courses. (Poland, Sweden)

- Training courses for the unemployed (in cooperation with the local job centre). (Poland, UK)

Looking at participation in any informal learning activity over the last twelve months, the following demographic differences were observed:

- Those library users aged 65+ were most likely to have participated (29%) and those aged 25-39 were least likely (20%).
- Those library users living in rural areas or villages (28%) and small or mid-sized towns (26%) were more likely to have engaged in informal learning than those living in large towns or cities (19%).
- Those library users from the Roma community were much more likely to have participated (37%) as were ethnic minorities (32%).

It is also of note that the age at which people finished their full-time education had no correlation with whether or not they engaged in informal learning. Therefore those both those with high levels of formal education and those with lower levels were equally likely to have participated in informal learning activities.

The qualitative research suggests that these demographic differences may be partly due to training activities that have been targeted at these groups. Many library managers believed that developing users' digital skills was a central reason for providing ICT services in public libraries, and much of the advice and structured training opportunities they offered focussed on this: for example, basic support and training in how to use computers (how to switch the computer on, use the mouse, print and scan a document, etc.) and basic internet skills such as how to use Google and create an email account.

Although users of all ages and levels of competence were said to benefit from these types of services, older people, those who are unemployed, and those who cannot otherwise afford access to ICT services were seen to benefit most. Computer language programmes were also mentioned as being particularly helpful for ethnic minorities and immigrants who arrive in the country without being able to speak the language. In providing these services, some libraries had partnered with schools, senior centres and job centres to access and attract the relevant people.
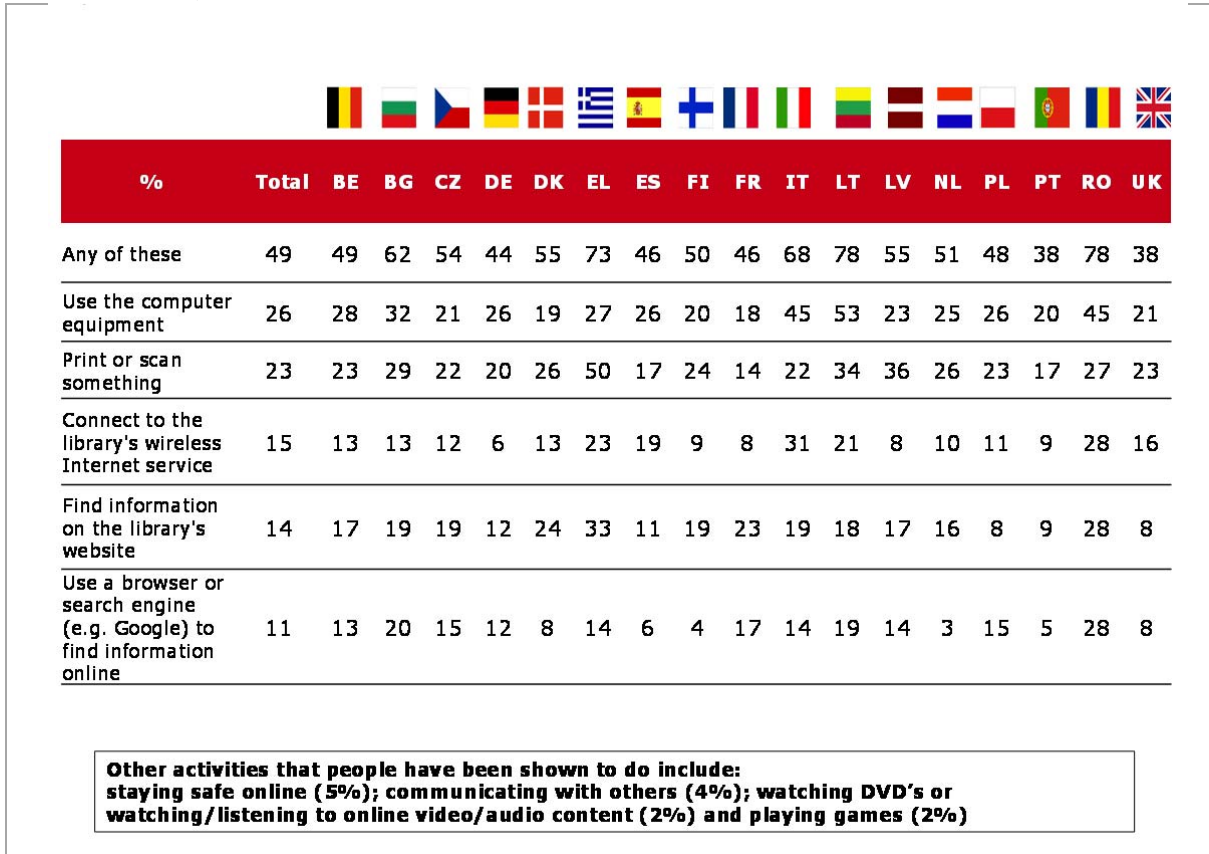
Examples of some innovative services regarding informal learning included: participating in an international project called 'Grandma PC' which focuses on intergenerational knowledge exchange – younger people learn from older experts (e.g. sculpting) and then youngsters teachers older people ICT skills; journalism courses for children in order to teach them to create an online magazine or blog; and people with disabilities using innovative software to be able to draw.

5.2 The role of public library staff in informal learning

Public library staff are a valuable and unique resource and the survey shows adults across Europe believe that staff play an important role in assisting library users in informal learning, and in particular, in assisting socially or digitally excluded groups. **Overall, half of those who had used a public library computer reported that they had been shown or helped to do something by a member of library staff within the last 12 months. This means that across the EU about 6.8 million adults have been assisted by public library staff in the last 12 months**. The proportion is reasonably similar across all 17 countries, with the exceptions of Lithuania, Romania and Bulgaria, where particularly high levels of assistance were reported. In terms of demographic groups, older people aged 65 and over, members of the Roma community and those from ethnic minority groups were particularly likely to report such assistance: these are of course some of the key groups who are traditionally digitally excluded, and so it is pleasing to see that libraries are providing support to these important target groups.

The most common ways in which library staff assisted library users were in using the computer (26%), printing or scanning (23%), connecting to the library's wireless internet service (15%), finding information on the library's website (14%) and using a browser or search engine to find information online (11%).

Figure 5.2: Staff assistance in informal learning activities (shown or helped to do something in last 12 months)

%	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Any of these	49	49	62	54	44	55	73	46	50	46	68	78	55	51	48	38	78	38
Use the computer equipment	26	28	32	21	26	19	27	26	20	18	45	53	23	25	26	20	45	21
Print or scan something	23	23	29	22	20	26	50	17	24	14	22	34	36	26	23	17	27	23
Connect to the library's wireless Internet service	15	13	13	12	6	13	23	19	9	8	31	21	8	10	11	9	28	16
Find information on the library's website	14	17	19	19	12	24	33	11	19	23	19	18	17	16	8	9	28	8
Use a browser or search engine (e.g. Google) to find information online	11	13	20	15	12	8	14	6	4	17	14	19	14	3	15	5	28	8

Other activities that people have been shown to do include:
staying safe online (5%); communicating with others (4%); watching DVD's or watching/listening to online video/audio content (2%) and playing games (2%)

Source: Library survey-C17. In the last 12 months have you been shown how or helped to do any of the following things by staff at a public library?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

Reflecting the quantitative evidence, users in the qualitative research reported that most of the support and training that they received had been individual and ad hoc rather than structured, with librarians advising and helping them with tasks as and when required. This was partly due to low levels of awareness of training classes – itself partly a result of a lack of communication from libraries, due to a lack of perceived demand for training, low ICT ability/confidence among staff, and/or lack of encouragement to use ICT in general (in some cases due to excess demand). It was also because most users knew that library staff are available to provide ad hoc assistance and training when needed, and found this responsive support appropriate and more than adequate for their needs.

"You gain confidence. And if something goes wrong, there will always be someone to help you. If you do not understand something at home, you will remain without an answer and will not know what to do." (Recent first time user, female, 25-39 years, Lithuania)

> *"If they didn't have the staff here that they do, we would just give up and go home when something goes wrong with the PC."* (User, female, 25–39 years, Czech Republic)

This widespread access to ad hoc training suggests that larger numbers of users are accessing informal learning and ICT support than the figures for structured activities indicate.

6. Employment

There are ever increasing online services to assist people in searching for and preparing themselves for employment. The disadvantaged and the socially excluded potentially have the most to gain from such services, but they clearly cannot unless they have access to the internet. If the EU is to help ensure that everyone has the opportunity to maximise their employment opportunities, then universal access to the internet is essential.

Public libraries have a role in providing this access to employment related information via the internet and this was a key theme within the research.

6.1   Using PACs to support employment related activities

At a topline, **the survey found that approximately 4.1 million PAC users (30%) had used library computers in the last 12 months to support some employment related activity.**   As with the picture regarding learning activities, those in some of the Eastern (notably Lithuania and Romania) and Southern (notably Greece and Italy) European countries were particularly likely to have used PACs for this purpose.

Not surprisingly, PAC users who had used library computers to support employment related activities tended to be in the key 25 – 54 age groups, rather than older or younger.   They were also particularly likely to be from a minority ethnic group, a migrant, or from the Roma community, and were more likely to be men rather than women.

Figure 6.1: Employment related PAC activities carried out in last 12 months
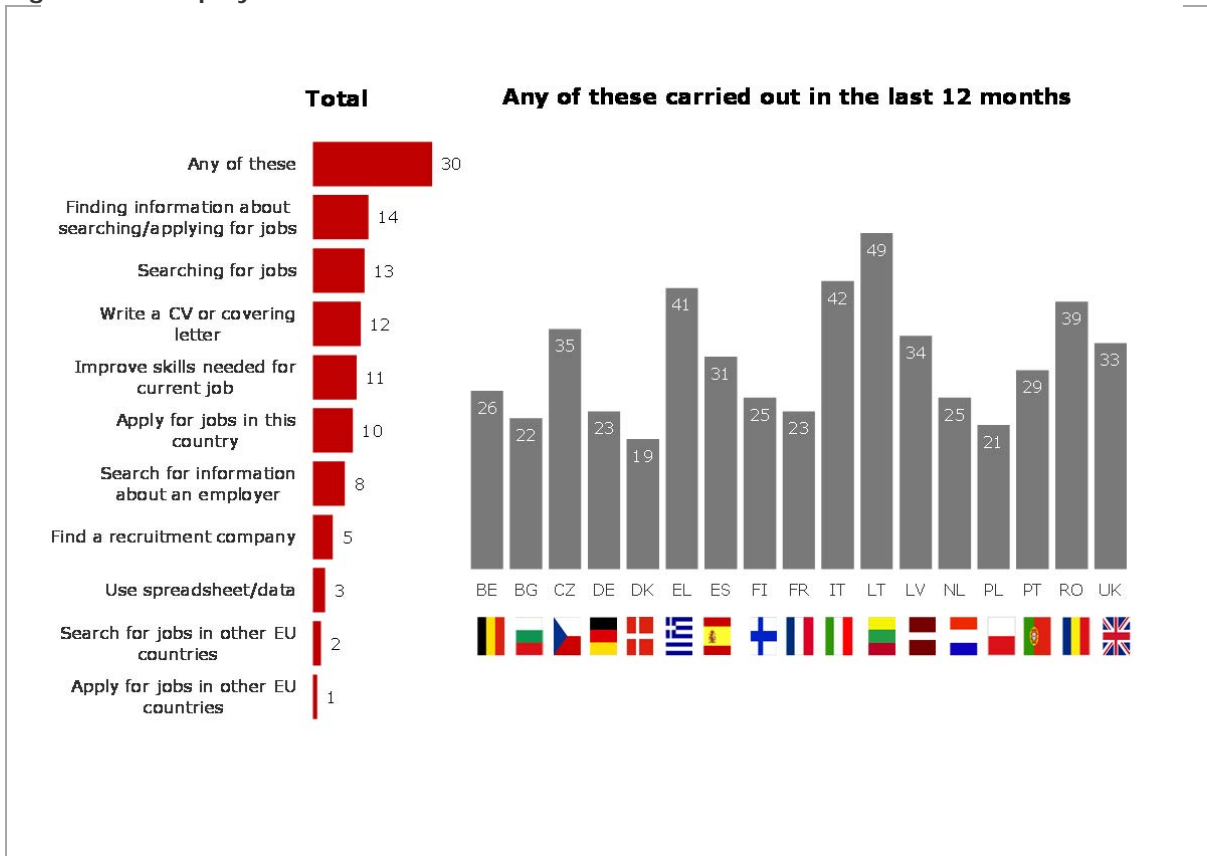
Source: Library survey-C18. In the last 12 months have you used the computers available in public libraries to...?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

Scratching below the surface reveals that the most widespread employment-related PAC uses were:

■ for finding information about searching and/or applying for jobs (14%) – c.2 million adults
■ for specifically searching for jobs (13%) – c.1.8 million adults
■ for writing CVs/covering letters (12%) – c.1.7 million adults
■ for improving skills needed in the respondent's job (11%) – c.1.5 million adults
■ and for applying for jobs in the respondent's country of residence (10%) – c.1.4 million adults

Those in the UK stand out as having the highest levels of usage of PACs for applying for jobs domestically, at 18% of all PAC users.

Small numbers of PAC users reported using PACs to search (2%) or apply (1%) for jobs in *other* EU countries. In terms of estimates of numbers of people, this means that about c.0.2 million adults had used a PAC to apply for a job in another EU country, with those living in Italy, Portugal and Latvia being the most likely to use PACs for this purpose.

6.2 Using PACs to apply for jobs

Overall, 11% of PAC users had used a PAC to apply for a job in the last 12 months – that job could either be in their own country, or in another EU country (or indeed both). **This equates to c.1.5 million adults across the EU**. These respondents were asked whether or not they had got a job that they applied for through the PAC – and 20% replied affirmatively. **This means that more than a quarter of a million adults across the EU had been successful in obtaining employment via a PAC**, clearly

emphasising the role the libraries play in supporting access to employment opportunities for communities across the EU.

While the survey data cannot support an analysis of the profile of those who obtained a job via a PAC, data is available on the profile of those who *applied* for a job using at PAC. This indicates that:

- There was a strong representation of the youngest age group. 34% were aged 15 – 24, 29% were aged 25 – 39 and 31% were aged 40 – 54.
- 69% were men, and 31% were women.

Library managers in the qualitative research had noted an increasing number of unemployed people and job seekers using PACs to search for jobs. These users were regarded as relatively easy to reach as they come to the library on their own initiative (particularly in Romania, Lithuania, Greece, Czech Republic, Belgium, Spain, Portugal). However, some challenges to accessing job seekers were mentioned. One which specifically related to the library environment was reluctance to seek advice on how to look for employment in a library, because of shame at being unemployed and not being amongst a bigger group seeking support.

> *"There was this nice lady [for] whom it took some time to admit what she wanted. She was simply ashamed that she wanted to look for information about benefits, or about a foundation that offered free Christmas parcels. She just wanted that information but was ashamed to admit so." (Library manager, semi-rural, Poland)*

6.3   The role of public library staff in supporting employment related PAC activities

Public library staff clearly have a role to play in supporting employment related PAC activities, although this does vary considerably from country to country. **Across the EU, 11% of PAC users or about 1.5 million adults indicated that they had been shown or helped in some employment-related PAC activity**. This proportion was much higher in some of the Eastern and Southern European countries, rising to 34% in Romania, 31% in Lithuania, 23% in Italy, and 20% in Bulgaria and the Czech Republic. In some countries (particularly Northern Europe) it was much lower – for example in Finland (3%), France (3%), Denmark (5%) and Portugal (5%).

Figure 6.2: Staff assistance in employment activities

%	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Any listed below	11	9	20	20	9	5	12	8	3	3	23	31	13	6	7	5	34	11
Improve skills needed in your current job	4	3	14	9	4	2	6	3	2	1	14	19	5	2	2	1	14	2
How to write a CV	5	5	6	7	2	3	3	4	*	2	10	7	7	2	4	4	13	7
How to develop skills needed to obtain a job	2	1	4	4	1	2	3	2	*	1	6	6	4	1	1	*	9	2
How to look for a job online (such as finding a recruitment company, searching for information about an employer)	3	2	4	6	2	2	2	2	*	1	6	8	5	2	3	1	8	3
How to apply for a job online	2	2	4	3	3	2	2	2	*	1	5	3	3	*	1	2	5	3
How to look for and apply for jobs in other EU countries	1	1	1	*	*	1	1	*	-	*	4	1	1	*	1	*	3	1

Source: Library survey-C20. In the last 12 months, have you been shown how/helped to do any of the following things by staff at a public library?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

From the qualitative research, the key ways in which public library staff assisted PAC users were helping with CV writing, assisting in improving the respondent's skills for their current job, helping them look for a job online, or helping them apply for a job online. Libraries in some countries were partnering with employment centres in this regard (Romania, Portugal, Lithuania, Germany, France, Czech Republic, UK).

> *"We've set up a kiosk space essentially dedicated to employment. The computers are there for that reason, and there's always an agent there to help people." (Senior library manager, urban, France)*

7. Use of PACs for business

Key points

■ About 0.9 million adults (or 7% of PAC users) had used PACs for business purposes and around 2.7 million adults – or 20% of PAC users – had used PACs for finding information related to a business they worked in.

The previous chapter looked at the role that PACs and public library staff play in providing access to employment opportunities – or at least in preparing people for employment. This chapter explores the role of PACs in providing adults across the EU with support for business related activities. As with employment opportunities, access to the internet is crucial for Europeans to be able to trade effectively and secure an income.

7.1 Use of PACs for business-related activities

In the context of their overall usage, PAC users were asked whether they had used PACs for a range of business-related activities. **Approximately 2.7 million adults (20% of PAC users) had used PACs for finding information related to a business they worked in**. Smaller proportions had used PACs for participating in professional networks such as LinkedIn (or local equivalents) (6%), or for finding ways or places to sell their own products or goods (4%).

Variation between the countries did not follow a particular pattern – use of PACs for finding business-related information was particularly common in the Czech Republic, Portugal and France, and was less common in Romania, the UK and Germany; while use of PACs for participation in professional networks and for sourcing markets for goods was most likely to take place in Italy and Lithuania.

Figure 7.1: Use of PACs for business-related activities in the last 3 months

Finding information related to a business you work in

Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
20	16	21	47	12	29	16	29	30	36	17	15	19	20	26	37	8	12

Participating in professional networks

Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
6	3	5		7	3	8	6	3	4	17	11	3	9	5	7	11	6

Finding ways or places to sell your own products or goods

Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
4	4	4	4	4	2	2	2	2	4	15	11	5	5	5	7	6	3

Source: Library survey-C10. For which of the following activities have you used the Internet on computers in public libraries in the last 3 months?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

In a separate question, respondents were asked specifically whether they had used PACs for business purposes, either running their own business or working in someone else's business, in the last 12 months. **Overall, 7% of PAC users had done this, which is estimated to be around 0.9 million people across the EU**. Use of PACs for business purposes was again most common in Italy.

Figure 7.2: Use of PACs for business purposes in the last 12 months
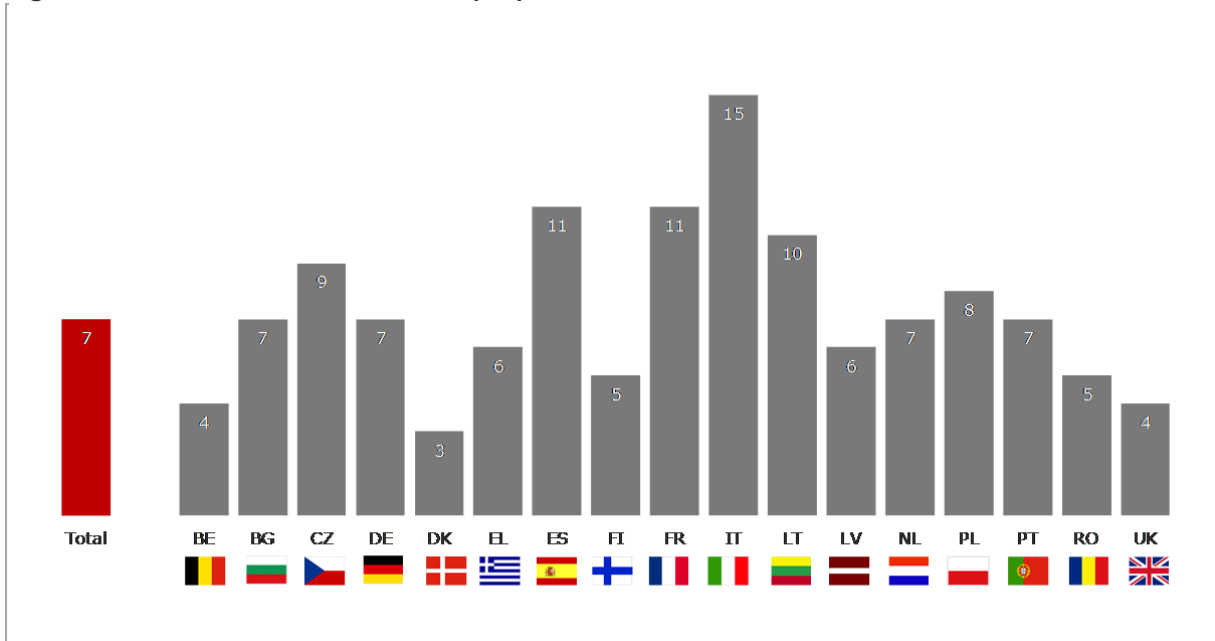
Source: Library survey- C21. Have you used the Internet on a public library computer for business purposes, either running your own business or working in someone else's business, in the last 12 months?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

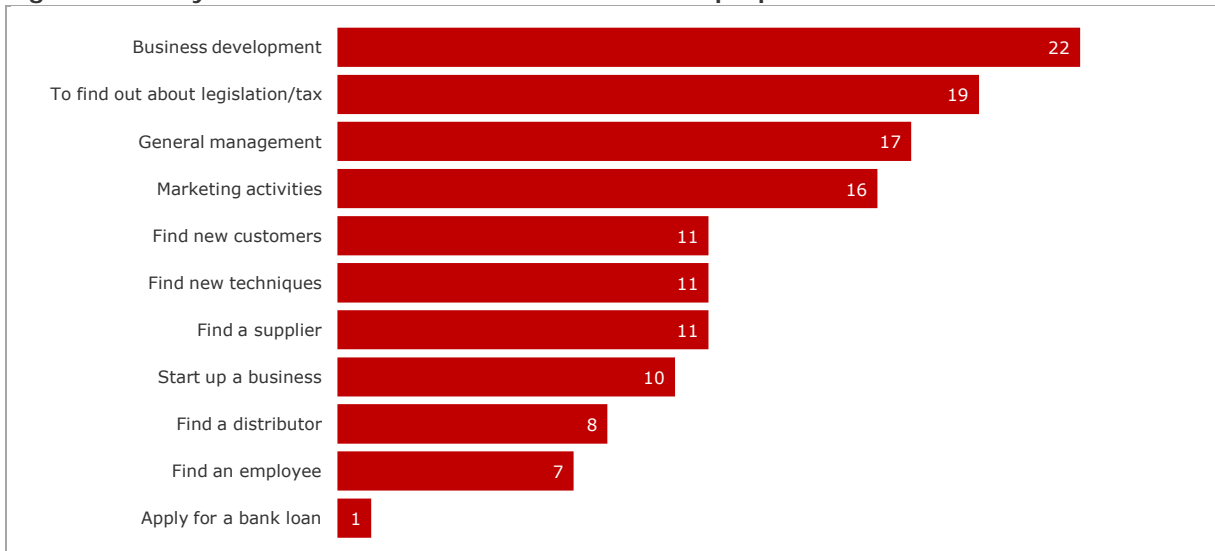The qualitative research with library managers showed that business support was one of the areas in which the least amount of assistance and training was provided. Library managers do not seem to get many requests for it, and tended to feel that there is not much demand for it. There was also some sense (for example in Sweden) that business advice and support involves complex rules and regulations, and should be left to the experts. That said, some held that libraries nonetheless do provide support as they offer business people a space to work with access to Wi-Fi, other ICT hardware and access to reference material.

> "We have a department that focuses on those who want to start their own business. With regard to procurement, we are a little more cautious about giving advice / support as it is a complex area; it is about laws and you do not want to give people wrong advice." (Senior manager, urban, Sweden)
>
> "Our social duty is not so much enhancing entrepreneurship per se, that's done elsewhere, but we provide the devices and we guide people if they want to set up a business. We don't have the [business] competence but we guide them to the right sources and see what kind of forms you have to fill in and what kind of places to be in contact with." (Senior library manager, urban, Finland)

PACs were used for a wide variety of business purposes by these users, including for business development, finding out about legislation or tax, general management and marketing activities, as shown in the following chart.

Figure 7.3: Ways in which PACs were used for business purposes

Category	Value
Business development	22
To find out about legislation/tax	19
General management	17
Marketing activities	16
Find new customers	11
Find new techniques	11
Find a supplier	11
Start up a business	10
Find a distributor	8
Find an employee	7
Apply for a bank loan	1

Source: Library survey- C22. How exactly did you use the Internet on a public library computer for business purposes?
Base: PAC users who have used PAC for business purposes in the last 12 months. Total (881)

8. E-government and active citizenship

Key points

- Across the EU, about 3.3 million adults had used PACs to interact with public authorities in the last 3 months. The figure varied considerably by country – from just 14% in Poland to 37% in the Netherlands. Men, those in employment, those in rural areas, minority groups and the Roma were particularly likely to interact with public authorities in this way.
- The survey estimates that around 0.3 million people across the EU have used PACs to send filled in forms for the purpose of tax declaration.
- Use of PACs for active citizenship varied considerably by country, with a clear South/East and North/West Europe divide. The former were the most likely to engage in this way; the latter the least likely. Overall about 3.7 million adults in the EU had used PACs for active citizenship in the last 3 months.

Access to e-government services is central to the EU's 2020 Growth Strategy and supports the overall digital agenda for Europe which seeks to increase the availability and diversity of online content. While levels of use will depend heavily on the state of e-government in individual countries and what information, services and transactions are available online, the survey provides insight as to how libraries contribute to this agenda.

8.1 Use of PAC for E-government

As part of the 'Connecting Europe' agenda, public libraries represent a network of public digital access points which can assist in the effective delivery of access to e-government. PAC users were asked about their interaction with public authorities using PACs, including obtaining information from public authorities' websites, downloading official forms, sending filled in forms, providing feedback/sharing opinions or perspectives with public authorities, and any other way they had interacted with public authorities online.

Overall c.3.3 million adults across the EU (or 24% of PAC users) had used PACs to interact with public authorities in the last 3 months. Interaction was found to be lowest in Poland (14%), Bulgaria (16%) and France (16%) and highest in the Netherlands (37%). The most common ways of interacting were obtaining information from websites (17% overall), downloading official forms (12%) and sending filled in forms (11%).

Figure 8.1: E-government - interaction with public authorities in the last 12 months

%	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Any listed below	24	25	16	23	20	30	27	30	25	16	33	24	19	37	14	25	21	20
Obtaining information from public authorities' web sites	17	20	10	17	14	24	18	25	20	13	23	12	14	29	10	15	15	12
Downloading official forms	12	10	9	9	9	13	18	17	6	9	22	14	9	21	7	13	10	12
Sending filled in forms	11	7	6	9	6	10	13	15	7	5	17	14	9	13	4	18	6	15
Sending filled in forms for the purpose of tax declaration	2	2	2	1	1	7	2	3	1	2	4	9	2	2	2	10	2	2
Providing feedback/sharing your opinions or perspectives with public authorities	4	2	2	5	4	6	5	3	6	1	11	6	3	3	4	4	4	2
Interacted with public authorities in any other way online	5	4	4	3	6	9	8	6	3	2	12	8	4	13	2	2	4	2

Source: Library survey-C23. Did you interact with public authorities over the Internet using a computer at a public library for private purposes in the last 12 months for the following activities?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

There were some important demographic differences in those who had interacted with public authorities using PAC in the last 12 months:

- Men (26%) were more likely than women (21%) to have used PACs to interact with public authorities.
- Those who were employed (27%) were more likely to have done one of these activities.
- PAC users in rural areas (27%) were more likely than those in medium or large towns (23%) to have used PACs for e-government activities.
- Younger people aged 15-24 (18%) were less likely to have done so.
- Use of PACs to interact with public authorities was higher amongst minority ethnic groups (35%) and Roma (29%).

Those who had used PACs for sending filled in forms were asked specifically if they had sent filled in forms for the purpose of tax declaration. Overall 2% of PAC users had used PACs for tax declaration forms, which is 22% of those who had used PAC to send in any filled in forms. This is estimated to be 0.3 million people in the last 12 months across the EU. Users in Portugal, Lithuania and Denmark were most likely to have used PACs to submit tax declaration forms.

PAC users who had *not* used PACs for sending completed forms were asked why not. The great majority (66%) said they had not had to submit any official forms, so the need had not arisen. Small minorities were concerned about data protection and security of personal data (3%), or said the process was too complicated and bureaucratic (2%).

As noted earlier, library users did not rate providing access to information about government services like tax, forms and so on very highly as a service for libraries to provide - half of library users (50%) said it

was highly important for libraries to do this, ranking this 13th out of the 14 services asked about in terms of importance.

Library managers in the qualitative research provided examples of users asking for informal support in filling out government forms online, sending in requests and complaints, submitting social security forms, and asking for help to complete tax returns online.

> *"Some poor families (including immigrants) could access public subsidies that were available only by asking them online. They came to our library and the reference service helped them." (Library manager, urban, Italy)*
>
> *"That is a part of our core stuff. That is something we do with our users all the time, we try to figure out [e-]forms and look where they are to be found [online]…The benefit for our users here is that when they have an important monetary issue or application that they must get forward and might lack knowledge or courage to do it at the bureau in question – here the rescue is often found at the library. That's where the benefit comes directly." (Senior library manager, urban, Finland)*

Although there were fewer examples of structured training on e-government issues, these do exist.

> *"In 2011 some agronomic engineers were sent by the APIA (Agency for Payments and Interventions in Agriculture) to guide the farmers on computers. It was a big success." (Senior library manager, urban, Romania)*
>
> *"All government communication is being digitalised nowadays. For people who do not know how to use a computer this becomes problematic. We organise special courses for example for immigrants and older people. We have an internet banking course and a course how to use DigiD." (ICT manager, urban, Netherlands)*

8.2 Use of PACs for active citizenship

PAC users were asked about their use of PACs for activities related to civic engagement and active citizenship. This covered areas such as civic participation (reading/posting opinions, taking part in on-line consultations, petitions etc) and seeking information on consumer or legal rights, and on government activity or politics, or grants/benefit schemes.

Overall about 3.7 million adults in the EU (26% of PAC users) had used PACs for one of these engagement activities in the past 3 months. The countries where computer users were less likely to have participated in these activities were the United Kingdom (16%), Denmark (13%) and Finland (18%). In contrast use of PACs for active citizenship was found to be the highest among PAC users in many of the Southern and Eastern European countries - Italy (45%), Greece (44%), Romania (43%), Lithuania (42%) and Spain (41%), and so there appears to be a clear divide here between South/East and North/West Europe.

The most common of these activities was reading and posting opinions on civic or political issues via websites (e.g. blogs, social networks etc): 14% of PAC users had engaged in this in the last 3 months. The proportion of PAC users who had done this was particularly high in Greece (34%), Italy (28%) and Romania (25%).

There were some demographic differences in use of PACs for at least one of these engagement activities in the past 3 months:

- Men were more likely to have engaged in these activities (29% compared with 23% of women).

- Those who had completed their full-time education after they were 20 were more likely to have done at least one of these activities than those who left school before the age of 16 (30% and 19%).
- Younger people (aged 15-24) were *less* likely than others to use PACs for one of these purposes (22%).

Figure 8.2: Use of PACs for active citizenship activities in the last 3 months

%	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Any of the below	26	30	30	25	31	13	44	41	18	24	45	42	35	24	31	35	43	16
Reading and posting opinions on civic or political issues via websites (e.g. blogs, social networks etc)	14	16	22	11	13	4	34	22	12	8	28	22	22	14	20	22	25	8
Seeking information on consumer/legal rights	11	12	10	13	16	6	15	14	2	11	22	20	11	14	12	14	16	5
Seeking information on local / national / EU government activity or politics	10	13	7	9	12	6	21	14	8	11	31	18	12	9	14	13	11	3
Seeking information on local / national / EU grants or benefit schemes	7	9	5	7	9	3	18	20	3	6	23	8	8	2	11	8	11	2
Taking part in on-line consultations or voting to define civic or political issues (e.g. urban planning, signing a petition)	5	4	4	4	2	3	5	10	5	4	16	9	5	3	8	9	9	4

Source: Library survey-C10. For which of the following activities have you used the Internet on computers in public libraries in the last 3 months?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703); EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

As noted in Section 4.1, almost three-fifths of library users (57%) said it was highly important for libraries to provide information about or for the local community.

9. Impacts

Key points
- At a top level, 83% of PAC users indicated that their PAC use had delivered at least one impact: this equates to 11.5 million EU adults. The most common impacts were saving time and money, but also more specific impacts around education, access to government services and access to resources and skills necessary to find work. Indeed 8.5 million EU adults reported one of these impacts. Those aged 15 – 24 and those aged 55 – 64 together with the Roma were most likely to report such impacts.
- More than nine in ten library users agreed that public libraries were accessible to everyone, provide access to information to those who don't have this elsewhere, and are friendly and welcoming. Three-quarters of library users agreed that libraries are modern and innovative.

A key aim of this research was to evaluate what the *impact* of increased digital engagement through PAC use was for users. This links in with the EU's 2020 Growth Strategy which has digital engagement at its heart. While much of the remainder of the report has looked at the activities that PAC users engage in, this chapter looks at the impacts of many of these.

9.1 Impacts of PAC use

PAC users were asked how helpful using computers at public libraries had been for them in the last 12 months, across a wide range of areas including saving time and money, and increasing access to information and resources.

Overall 83% of PAC users across the EU said their PAC use had been helpful to them in at least one of the areas asked about. In terms of numbers of adults, a massive 11.5 million have found their PAC use helpful in at least one way.

61% of PAC users reported that their usage of computers in libraries had been helpful specifically in terms of their education, access to government services and access to resources and skills necessary to find work. This equates of 8.5 million people.

The most common areas in which PAC use had been helpful were the general areas of saving time (61%) and saving money (50%). PACs were also helpful across a range of leisure and social areas such as pursuing interests and hobbies (48%), pursuing other leisure activities (42%) and maintaining communication with family and friends (43%).

More specific impacts of PACs were around improving education (47% said PAC use had been helpful), improving access to government information and services (30%), improving access to resources/skills necessary to find work (28%) and improving employment/business prospects (26%). 14% said PAC use had been helpful in increasing their income, which although a relatively small percentage of users represents approximately 1.9 million people across the EU countries.

Figure 9.1: Impact of PACs for users

% A lot of help / some help

Category	Value
Any of the below	83
Saving time	61
Saving money	50
Pursuing interests and hobbies	48
Improving education	47
Maintaining communication with family and friends	43
Pursuing other leisure activities	42
Improving overall wellbeing	39
Meeting new people	32
Improving access to government information and services	30
Improving access to resources/skills necessary to find work	28
Improving employment/business prospects	26
Improving health (e.g. by providing access to health information)	25
Improving participation in local language/culture activities	24
Increasing income	14
Sending/receiving money to/from family or friends	10

Source: Library survey- C28. In the last 12 months, has using computers at public libraries been helpful to you in the following areas?
Base: PAC users Total (11716)

Managers and users in the qualitative research reported similar positive impacts, and in addition stressed the importance of PACs in enabling people to increase their self-esteem and confidence, and reducing social isolation. Managers claimed that many of their users who had started out with no ICT skills are now able to use computers and have been able to master basic ICT skills. This has had numerous benefits. It has allowed them to keep in touch with family members in other countries through email and Skype – for example, a Romanian mother with a daughter living in Turkey could not afford to call her daughter on the phone but, after a long time apart, was now using PACs to hear and see her.

> "We have an elderly Russian-speaking woman. So after the courses she found her brother who is living in Russia and about whom she did not know anything for 30 years. She wrote to their city municipality and found him. They are corresponding now and are happy about that. She says she will never be able to visit him but now she can at least talk to him." (Senior library manager, semi-rural, Lithuania).

Being able to buy goods online and pay accounts was also frequently mentioned as a positive impact for users, as was gaining easier access to information and being more able to find work as they have easier access to online job portals and are able to include ICT skills on their CVs when they apply for work.

> "A man came here, we taught him how to design an e-shop and now he sells things. This is a man who lost his job and we are happy that we helped him find a solution to his problem." (Library manager, semi-rural, Greece).

Users' accounts of the impact that using PACs has had on their lives were very similar to the managers' reports. They emphasised the impact on people's level of education and development, the increase in self-confidence and independence, and the importance of free ICT access in public libraries to bridge the digital divide for those who are not able to access these services otherwise. Users frequently mentioned the ability to keep in contact with family and friends abroad via email and Skype, the importance of ICT skills and access to online job portals in gaining employment, and how ICT saves users time and makes it easier to perform everyday tasks such as shopping and banking.

> *"I found great CV templates on the internet, including information on personal data protection. I was unemployed, and these tips helped me to draw up my CV and get a job. Internet helped me the most and that was great."* (User, female, semi-rural, Poland)
>
> *"I found my current job by searching and e-mailing in the library."* (User, female, 25-39 years, Belgium)

Users reported a wide variety of less common benefits as well, touching on topics such as personal interests, health, e-government, business matters and saving. Some examples are given below:

> *"I came to open an email account…I had no idea how to do it, but it was necessary because I looked like a freak every time someone asked me for it and I said that I didn't have one."* (User, male, 40-65 years, Spain)
>
> *"I visit websites dedicated to horses. I learn where the competitions are, how to get there and what the types of competitions are."* (Recent user, female, urban, Poland)
>
> *"I stopped smoking, by the way. By internet. Allen Karr's audio book. I just downloaded it, listened in for three days – that's all. I do not smoke for some 3-4 years, very rarely during the last year."* (User, male, 16-24 years, Latvia)
>
> *"Once I was here with my wife and she had a problem with an application on her mobile phone. I checked it through the computers and I found a solution. She was very happy that I fixed it."* (User, male, 40-64 years, Greece)
>
> *"My father does his tax declaration always online here, it goes a lot quicker than through the mail."* (User, female, 16-24 years, Belgium)
>
> *"I have found a way how to save. I recently took the courage to order online. There was a promotion on…raspberries. I really purchased them much cheaper. And I made another step forward."* (User, female, 25-39 years, Lithuania)
>
> *"I have learned a lot about how to start an online business and how to pay your local taxes and do various shopping online from virtual stores."* (User, male, 25-39 years, Romania)

More generally, managers in the qualitative research argued that free access to ICT provides structure and meaning to the lives of those who are unemployed or retired as they have somewhere to go, are able to remain mentally active, and are offered an opportunity to socialise with other users at the libraries. Free ICT access and greater competence in ICT skills was said to help bridge the digital divide and to

allow users to be more informed about current events and to find it easier to participate in civic life. Managers believed that these new skills have allowed users to become more independent, to feel more confident in themselves and their abilities, and to feel more included as they have access to the same skills and information as everyone else.

> *"We were writing a CV and we sent it. I cannot say for sure that it was thanks to this particular effort, or something else that she found work, but she did. Meanwhile her level of self-confidence increased. And this is so important to know one's worth. People tend to think that they are not experienced enough and cannot do anything. Here people start believing in themselves, get the sense that after all they have some skills. Especially if you go home and start using computer at home." (Library manager, semi-rural, Poland).*
>
> *"I had a user who was 94 years old, who ended up being my friend. He learned for instance how to browse the internet, how to send emails, and he started to send e-mails to everyone, he even started to receive the electricity's bill online...when he died his daughters came to thank me for having provided a great last few years for their father." (Senior library manager, urban, Portugal).*
>
> *"They are fully equipped to act as citizens and take part [in society] in order for them not to become marginalised. It's great that...we can provide people with readiness to do things themselves." (Senior library manager, urban, Finland).*

Figure 10.2 shows the country breakdown of these more specific impacts of PACs. PAC users in Greece and Portugal were particularly likely to say that PAC had been helpful to them in all of these areas. Users who were self-employed (31%) were more likely than those who were employed (17%) or not working (11%) to say their PAC use had helped to increase their income.

A number of demographic differences were observed when looking at whether PAC use had been helpful to people in at least one of the areas asked about:

- The self-employed (71%) were less likely to have said PAC use had been helpful than those employed (83%) and those not employed (84%)
- Those aged 15-24 and those aged 55-64 were more likely to have found PAC helpful (both 85%) than those aged 65+ (79%)
- Roma were more likely than others to have found PACs helpful (91%).

Figure 9.2: How PACs have been helpful

% A lot of help / some help	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Any of the areas asked about	83	89	97	95	81	82	96	94	85	85	92	99	94	79	87	99	90	73
Improving your education	47	45	56	38	56	35	85	67	45	38	64	62	56	37	48	82	80	34
Improving access to information services from local/central government	31	30	36	20	24	32	47	40	24	25	41	25	30	34	31	48	35	28
Improving access to resources necessary to find work	28	27	38	36	15	19	48	33	18	19	39	34	32	30	29	55	36	29
Improving employment/business prospects	26	30	37	23	16	20	44	33	18	25	36	45	27	23	26	49	41	22
Increasing your income	14	18	24	20	6	9	31	9	10	8	27	26	19	17	19	31	24	12

Source: Library survey-C28. In the last 12 months, has using computers at public libraries been helpful to you in the following areas?
Base: All PAC users. Total (11716); BE (650); BG (718); CZ (697); DE (708); DK (703) ; EL (714); ES (713); FI (713); FR (602); IT (682); LT (700); LV (729); NL (523); PL (700); PT (700); RO (749); UK (715)

9.2 Perceived value of public libraries

All library users were asked their opinions of public libraries, through a series of agree/disagree statements. Levels of agreement with all of the statements were high. More than 9 out of 10 library users agreed ('Strongly agree' or 'Agree') that public libraries are accessible to everyone, provide access to information for those who don't have this elsewhere, and are friendly and welcoming.

Levels of agreement that libraries are modern and innovative were somewhat lower, although still three-quarters or more of library users agreed with these statements.

Figure 9.3: Perceptions of public libraries - total
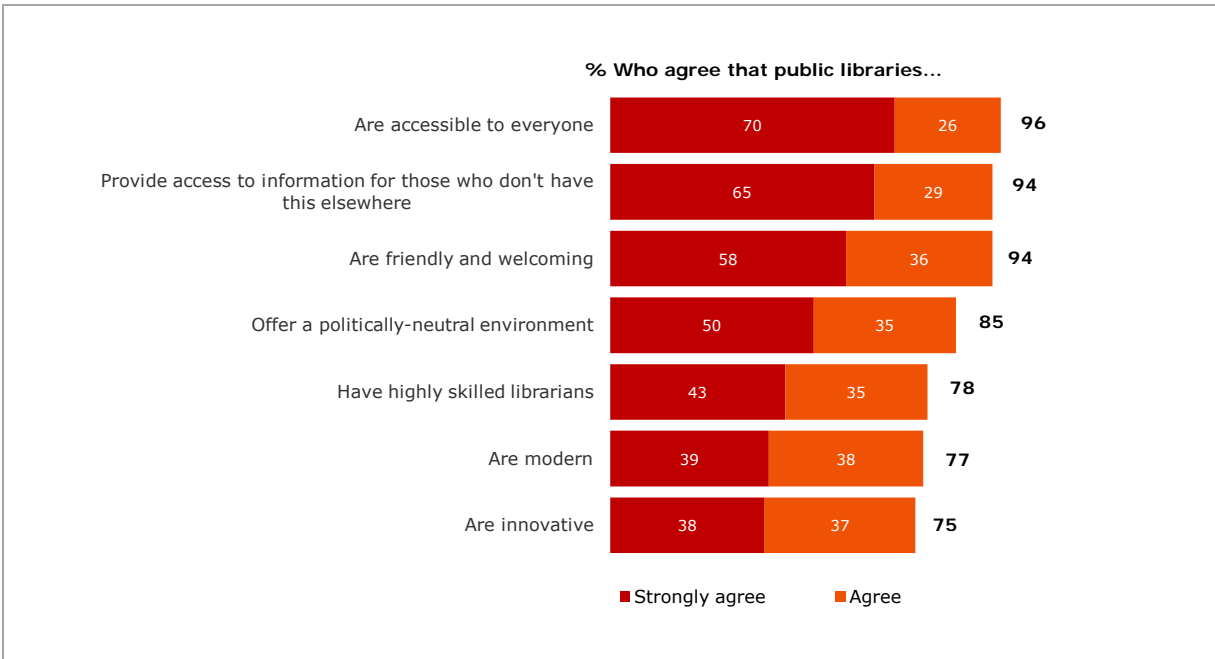
% Who agree that public libraries…

Statement	Strongly agree	Agree	Total
Are accessible to everyone	70	26	96
Provide access to information for those who don't have this elsewhere	65	29	94
Are friendly and welcoming	58	36	94
Offer a politically-neutral environment	50	35	85
Have highly skilled librarians	43	35	78
Are modern	39	38	77
Are innovative	38	37	75

■ Strongly agree ■ Agree

Source: Library survey- C29. How far do you agree or disagree with the following statements?
Base: All library users. Total (24253)

As overall levels of agreement were so high, we focus on those who 'strongly' agreed when considering variations between countries. Generally, users in Bulgaria, Finland, Latvia, Lithuania and the UK were most likely to strongly agree with these statements:

- Public libraries are accessible to everyone, and they provide access to information for those who don't have this elsewhere – strongest agreement in Bulgaria, Germany, Finland and the UK.
- Libraries are friendly and welcoming – strongest agreement in Finland, Latvia, Lithuania and the UK.
- Libraries offer a politically-neutral environment – strongest agreement in Bulgaria, Finland, Lithuania, Latvia, and the UK.
- Public libraries have highly skilled librarians - strongest agreement in Bulgaria, Latvia, Lithuania and the UK.
- Public libraries are modern – strongest agreement in Bulgaria, Lithuania and the UK.
- Public libraries are innovative – strongest agreement in Bulgaria, Lithuania, Romania and the UK.

Levels of strong agreement with these statements were generally lowest in Spain, Italy and the Netherlands.

Figure 9.4: Perceptions of public libraries – strongly agree

% Strongly agree	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
Public libraries are accessible to everyone	70	55	83	70	84	77	70	53	88	62	57	79	79	54	74	59	67	82
Public libraries provide access to information for those who don't have this elsewhere	65	53	82	67	75	71	61	53	80	61	49	73	72	48	69	45	68	78
Public libraries are friendly and welcoming	58	51	63	65	61	63	52	39	74	44	41	75	79	47	69	51	68	77
Public libraries offer a politically-neutral environment	50	40	64	56	55	53	55	28	67	42	35	73	67	39	57	48	54	65
Public libraries have highly skilled librarians	43	35	68	50	55	39	38	23	55	25	26	69	63	30	58	30	51	64
Public libraries are modern	39	30	56	41	36	36	24	23	46	36	27	50	47	26	44	32	48	59
Public libraries are innovative	38	29	55	35	38	34	29	22	31	33	28	52	49	25	44	27	52	58

Source: Library survey- C29. How far do you agree or disagree with the following statements..
Base: All library users - Total (24253); BE (1535); BG (1428); CZ (1402); DE (1418); DK (1410) ; EL (1415); ES (1418); FI (1443); FR (1330); IT (1481); NL (1386); LT (1400); LV (1459); PL (1400); PT (1400); RO (1496); UK (1432)

Older respondents were generally more likely to strongly agree with these statements than younger people, particularly that public libraries are modern and innovative.

Figure 9.5: Perceptions of public libraries – age groups
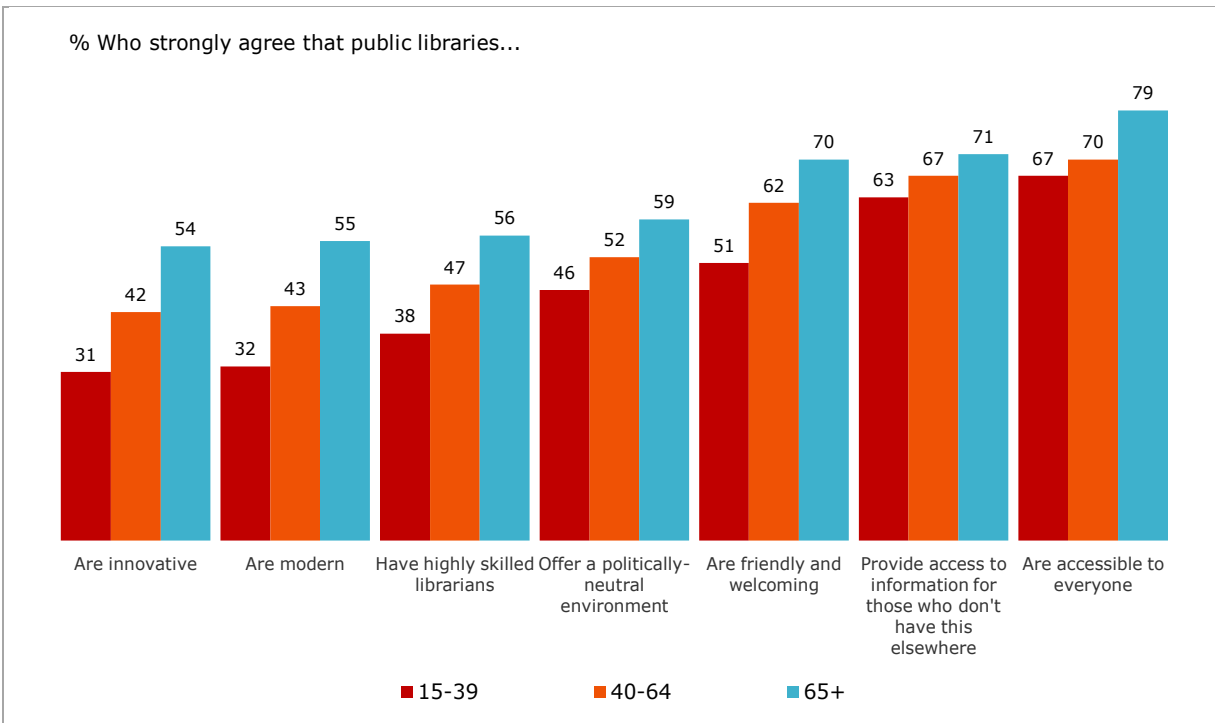
Source: Library survey- C29. How far do you agree or disagree with the following statements..
Base: All library users. 15-39 (12674); 40-64 (8521); 65+ (2932)

10. Conclusions

How are libraries contributing to the EU's engagement agenda?

There are a number of key target groups that the European Commission is keen to engage with including young people, the elderly, women returners to the job market, and migrant/Roma populations. The research provides ample evidence that libraries are contributing very strongly to this agenda for young people, the elderly and migrant/Roma populations (note that due to their small numbers, it was impossible to highlight 'women returners' as a target group within the research). For example:

- Young people between the ages of 15 and 24 are particularly likely to use PACs in libraries
- Members of the Roma community, ethnic minority groups and migrants tend to be very regular users of the PAC service
- Older people aged 65 and over, the Roma and ethnic minority library users/PAC users were the most likely to have participated in informal learning, and to have received ICT-related assistance from library staff

There is also compelling evidence from the survey that it is the Roma and older people (together with those with a disability, those not currently employed and those who finished their full-time education at a relatively early age) who do not have other options for accessing the internet, and therefore have the most to lose if the service is not properly supported.

The survey estimates that 13.9 million adults across the EU have used PACs in the last 12 months – and this obviously does not include any young users below the age of 15, who are likely to make up a significant proportion of users, but who were not included in this study.

How are libraries contributing to the EU's non-formal and informal learning agenda?

Informal and non-formal learning are being viewed as increasingly important within the EU, and from the survey it is clear that libraries are playing an important role in helping to deliver this. Indeed about 24 million adults across the EU had taken part in educational activities in libraries in the last 12 months – with Lithuanian library users and Romanian library users being particularly likely to engage in such learning activities. The range of educational activities captured in the research was wide – for example courses relating to basic ICT skills (e.g. introductions to the internet and Facebook, creating an email account, making online purchases and using online banking, using Microsoft Office and the Adobe Creative Suite, online security, cloud-technology, image processing and how to create a website), foreign language courses using ICT, support and guidance relating to personal interest and hobbies (ancestry, flower arranging, horses), and activities promoting intergenerational contact (e.g 'Grandma PC' sessions in which younger people learn skills such as sculpting from older people in return for teaching them ICT skills). However, the key activities mentioned in the quantitative research were attending lectures or talks, receiving assistance with homework or other education, and attending a discussion, debate or presentation. Of particular interest is the fact that the survey estimates that around 2.3 million adults across the EU had attended a computer training class in a library in the last 12 months.

Library learning activities seemed to be particularly attractive to older library users (aged 65 and over), to the Roma and ethnic minorities and to those living in rural areas or villages and small or mid-sized towns. The first three of these groups are clear targets for the EU in terms of increasing inclusion.

Aside from formal learning activities, library staff contribute to the EU's non-formal and informal learning agenda through assisting library users in a variety of ways. About 6.8 million adults across the EU reported such help in the last 12 months, with particularly high levels of assistance being reported in Eastern European countries – Lithuania, Romania and Bulgaria. In line with participation in learning activities, it was older people, the Roma and ethnic minorities who were particularly likely to benefit from such assistance – a resource that they might struggle to find elsewhere. Indeed from the qualitative research it was clear that libraries serve an important function in developing users' most basic ICT skills – for example, use of the mouse, printing and use of Google and email.

How are libraries contributing to the EU's digital inclusion agenda?

The Digital Agenda for Europe seeks to increase the availability and diversity of online content, support cheaper and more reliable online transactions, and enhance access to interoperable e-Government services. Those who remain digitally excluded will suffer from additional social and economic disadvantage and risk falling further behind.

The survey reveals that about 3.3 million adults across the EU have used PACs to interact with public authorities in the last 12 months. Interaction is of course partly limited by the range of services available, but the range in proportions of PAC users who had interacted in this way was from 14% to 37% across individual countries. The most common form of interaction was naturally obtaining information from websites, but more ambitious interactions such as downloading official forms and sending in forms were also quite common. Indeed 0.3 million people had used PACs in the last 12 months for tax declaration.

There is also significant activity on PACs concerning active citizenship, with 3.7 million adults having participated in an engagement activity in the past 3 months. The main activity was reading and posting opinions on civic or political issues via websites. There is a clear South/East and North/West Europe divide on this, with those in the former areas being most likely to participate in this way.

Much of the EU is currently in recession. How is this reflected in the findings?

Despite the fact that the survey was conducted against a background of gloom and austerity across much of Europe, it is perhaps both surprising and very encouraging to see the level of support that exists for libraries – both in broad terms and more specifically in terms of financial support. Not only do PAC users clearly value libraries, but two in five adults across the EU believe that their funding should actually be increased, while only a mere one in twenty adults feel that their funding should be decreased. The highest demands for increased support came from some of the countries facing the greatest economic difficulties – such as the Greeks and Spaniards, and also Eastern European countries such as Bulgaria and Romania, where the impact that libraries can actually make on communities facing real hardship is perhaps greater than in the most affluent European countries.

Financial considerations – and specifically the free nature of the service – are a major factor driving PAC usage in libraries, and indeed 1.9 million current PAC users across the EU indicated that there was *no* other free source of the internet that they could use. Overall about a third of PAC users cited free internet access as one of their main reasons for using PACs, with those in some of the poorer countries (Lithuania, Romania, Greece and Portugal) featuring very strongly among this group.

In times of high unemployment across significant areas of Europe, the survey provides insight into how PAC access is assisting some people some people to actually find employment, either in their own country or indeed in another country. Indeed in the 12 months prior to survey fieldwork, about a quarter of a million adults had actually been successful in obtaining employment via a PAC.

What further opportunities are there for libraries to continue to serve communities across the EU?

From the research it is clear that libraries are perceived to be a valuable resource by users, one which is perceived to merit further investment. There are certainly opportunities for libraries to serve their communities more in PAC-related issues – and the research highlights that there are already adults visiting libraries who claim that they do not know how to use computers, or do not feel that they have anything to do on computers. These groups are 'soft targets' for libraries who should aim to widen their net for computer-related training.

The percentage of the population who visit a library in part determines its potential impact – and here there is huge variation between countries from a high of 67% of adults in Finland to a low of 9% in Greece.   As a general statement, those living in Southern and Eastern European countries are less likely to visit libraries than those in Western and Northern European countries – and it is in many of the Southern and Eastern European countries (Bulgaria, Greece, Italy, Lithuania, Latvia, Poland, Portugal and Romania) where internet access at home is relatively low. So there is huge need and potential for libraries to help bridge the gap in these countries, but to do so effectively will ultimately involve attracting more people to libraries in the first place.

While the majority of library users are clear that libraries are effective in meeting community needs, non-users are not quite so clear in their view. This implies that there is a job to be done in terms of promoting the multiple roles that libraries play in the twenty first century.

What further research is needed?

This has been a large and comprehensive study, covering the general public, library users, PAC users and library managers across the EU. It has answered many questions, and undoubtedly raised some more. Possible areas for further research include:

- The barriers of using the internet to people who do not speak English.
- How libraries can successfully encourage new people to walk through their doors and use their services.
- How the needs of some key minority groups such as the Roma can most successfully be met through libraries.
- Research to put an economic value on the impacts that public libraries and the PAC service actually have across the EU.

Appendix A: Methodology

As described in the introduction to this report, the method for this research comprised the following components:

1. **A workshop among key stakeholders to discuss the key priorities for the research**. This involved participation of representatives from the Bill & Melinda Gates foundation, the University of Washington, impact assessment specialists from the five Global Libraries grantee countries, Civic Agenda and TNS.

2. **Desk research**, to collate key data concerning libraries, conducted in 17 [16] of the 27 EU countries.

3. **An omnibus survey** in each of the 17 countries, to provide basic data on library and PAC usage, based on a robust sample of the national adult population aged 15 and over. A total of 17,816 interviews were conducted – c.1000 in each of the 17 countries.

4. **A survey among library users and PAC users** aged 15 and over, in each of the 17 countries, conducted in libraries. A total of 24,253 interviews were achieved: 11,716 with those who had used a PAC in a library in the last 12 months, and 12,537 with those who had used a public library in the last 12 months (but not a PAC).

5. **Qualitative research** in each of 18 [17] countries, four group discussions with PAC users, and 5 depth interviews with library managers and senior managers.

Further details about numbers 2 – 5 above are provided below.

Desk research

Desk research was carried out to collate existing information showing the public library landscape in the survey countries. The desk research helps to provide a context for interpretation of the survey results.

The desk research was co-ordinated by TNS's Business Intelligence Unit, using desk research experts located in each country. This ensured that local language sources and information that cannot be retrieved by English-language searches only were considered.

Sources included IFLA, national and local library statistics, local library associations, national statistical offices, Eurostat, Eurobarometer and so on. In some cases where important data were missing we attempted to close information gaps through primary research including interviews with local libraries in the country, government ministries and other relevant organisations and associations.

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[16] The 17 countries were Belgium, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Spain and the UK. Together these countries account for over 90% of the EU's population (source = Eurostat).
[17] Sweden was included in the qualitative research, but not in the other research components.

Omnibus survey and library user/PAC user survey

Between 18th October and 24th November 2012, 17,816 members of the general public aged 15+ in 17 European countries were interviewed regarding their usage of libraries, computers in libraries and their attitudes towards libraries. Approximately 1,000 interviews were conducted in each country using the TNS Omnibus. In most countries fieldwork was conducted face-to-face, but a telephone methodology was used where necessary (predominantly in the Nordics). This survey provided reliable estimates of key measures among geographically and socio-economically representative samples of the adult population.

Surveys were also conducted within libraries in each of the 17 countries with library users who had used Public Access Computers (PACs) in libraries within the last 12 months, and library users who had not used PAC. The questionnaire covered usage of libraries and computers. In each country approximately 700 interviews were conducted with people who had not used computers and 700 with those who had. The fieldwork was conducted between 29th October and 16th December 2012. In total 11,716 interviews were achieved with library computer users and 12,537 interviews were achieved with library users who had not used library PACs in the last 12 months.

Respondents were interviewed face-to-face, either by CAPI (Computer Assisted Personal Interviewing) or using pen and paper. Weighting was applied at the analysis stage; the targets used came from the general public survey and ensured that the profile of the final library user sample was representative.

Questionnaire

Three questionnaires were used:

- A five minute questionnaire for the general public, administered using the TNS Omnibus in each country.
- An eight minute questionnaire for library users who had not used a library PAC in the last 12 months, administered face-to-face within libraries.
- A fifteen minute questionnaire for library PAC users (which included the eight minute questionnaire), administered face-to-face within libraries.

Piloting

The two in-library surveys were tested in three countries: the United Kingdom, Spain and Poland. Two libraries were selected in each country for the piloting and fieldwork was carried out between the 6th and 12th October 2012. In each country around 20 interviews were achieved with library PAC users and a further 20 with library non-PAC users. Based on the answers that respondents gave to the pilot and feedback from the interviewers, changes were made to the questionnaire ahead of the main stage.

Translations

The master questionnaire was developed in English and then translated into the other languages. To ensure that the translation was faithful to the English original and that specialist vocabulary had been translated correctly a strict quality control procedure was adhered to. Nominated public library representatives in each country reviewed and adapted the translation where necessary. The TNS office in each country also reviewed the translation. Finally, the questionnaire was translated back from the local language to English and compared to the original master questionnaire to ensure that the meaning of questions had not changed.

Sampling

General public survey

Omnibus surveys were used to provide access to a representative sample of the general population aged 15+ in each country. This was generally carried out using face-to-face interviews, however in Denmark,

Finland, Greece and the Netherlands, interviews were carried out by telephone. Telephone coverage is very high in these countries, and the Omnibus surveys included both mobile and landline numbers, ensuring that representative samples were obtained. Samples were carefully quota-controlled to be nationally representative of the population aged 15+ of each country. Where applicable, weighting was also applied to correct any minor imbalances in the sample profiles.

Library survey

To aid with the sampling, the Bill & Melinda Gates foundation put TNS in touch with library contacts in each country: these library experts were typically Ministerial staff.

A list of all the libraries eligible for the survey was provided to TNS by the nominated library contact in each country (the sample frame). Libraries eligible for the study were defined as libraries that anyone can go to free of charge (excluding school or university libraries, even if they are open to the general public).

Some of the library contacts were not able to provide a full list of libraries, as in some countries a central list did not exist and there was insufficient time to put one together. This meant that in some instances partial lists had to be used, although the TNS research team checked these to ensure that they had sufficient coverage and were not systematically biased, thereby ensuring that the findings would be robust.

In each country the initial aim was to conduct the research at between 25 and 50 libraries. The number of libraries sampled in each country was decided in conjunction with the local TNS office in each country. In smaller countries, it was more efficient to have the minimum number of libraries while in larger countries it was more efficient to have a higher number.

Prior to selection of the libraries, the universe was stratified by a geographic measure (such as rural/urban or administrative regions) to ensure that the libraries selected in each country were geographically dispersed and representative. Where the sample frames included information on usage (e.g. number of members or loans) probability-proportional-to-size (PPS) sampling was used to select the libraries at which the survey was to be conducted. In some countries, no details were provided on how busy each library was and a simple random sample (SRS) was selected using a one-in-n approach with a random start.

Once the libraries were selected, the library contact in each country was responsible for contacting them and getting their agreement to participate. Where libraries refused to or were unable to take part they were replaced with another library which was as similar to the original as possible. In some countries, a high number of libraries were unable to take part and interviews were completed in fewer than 25 libraries.

Interviews were conducted on different days of the week (including weekends) and at different times of the day, to ensure the full range of library visitors was interviewed.

Data analysis and weighting

All aspects of data processing were carried out by the TNS in-house analysis team, who worked in close conjunction with the research team.

To ensure that the final results were representative of the population within in each country (of adults aged 15+), rim weighting was applied. The general public survey was weighted in a two stage process, firstly the data for each country was weighted to be demographically representative of the general population aged 15+. Further weighting was also applied to rebalance the weight of each country within

the pan-European totals; this was based on the population of those aged 15+ in each country. The figures used for the second stage of weighting were obtained from Eurostat (2012 where possible, otherwise 2011).

The library user surveys were weighted using data from the general public survey. Again a two stage weighting process was used; firstly, the library users were weighted to be demographically representative of library users in their respective countries. The weighting targets used were: gender, age, rural/urban and use of computers. The data was also weighted by frequency of library usage as the sampling method used sampled library users based on visits not visitors, which meant that more frequent library users had a higher chance of being sampled for the survey. Weighting them by the frequency of visits from the general public survey meant that the final sample was representative of all library users. Lastly, weighting was applied to rebalance the weight of each country based on the number of those aged 15+ in each country who had used a library in the last 12 months, to ensure that the pan-European total was representative of all of the countries surveyed.

Achieved sample
The final achieved figures in each country for each of the three surveys can be seen in the table below.

Number of interviews achieved

	Total	BE	BG	CZ	DE	DK	EL	ES	FI	FR	IT	LT	LV	NL	PL	PT	RO	UK
General public survey	17816	1018	1043	986	1026	1045	1000	1000	1008	1006	1016	1106	1091	1004	1000	1261	1117	1089
Library users (not computer users)	12537	885	710	705	710	707	701	705	730	728	799	700	730	863	700	700	747	717
PAC users	11716	650	718	697	708	703	714	713	713	602	682	700	729	523	700	700	749	715

The number of interviews achieved with PAC users in France, Belgium and Netherlands was lower than originally planned. This was a result of low throughput of PAC users in these countries, additional interviewer shifts were used to maximise the number of interviews, but it was not possible to complete the full number of interviews originally planned within the project deadlines.

Qualitative research

In October and November 2012 qualitative fieldwork was conducted in the 17 countries. Fieldwork in each country comprised the following:

- 5x 60-minute depth interviews with library managers (a mix of managers of local libraries and regional or more senior managers)

- 4x 90-minute group discussions with PAC users, with 6 respondents in each (in 3 groups, respondents had used a PAC within the past 6 months; in one group, respondents had used a PAC for the first time in the past 6 months)

This fieldwork was also conducted in Sweden in December 2012 and January 2013.

At least 3 libraries were represented in each country, in both urban and semi-rural locations. The library and senior managers were interviewed before the groups took place; respondents in each group were all users of the same library; and the majority of the groups involved users of the libraries from which a manager had been interviewed. This 'case study' approach allowed us to compare managers' and users' views of the same services.

The library contact in each country identified suitable libraries (based on their location, user base, ICT provision and other factors) and passed their details on to researchers in the local TNS or partner research agency, who then made contact to arrange fieldwork. In many cases, the library managers helped identify suitable users, who were then recruited by the research agency.

Recruitment questionnaires and topic guides for the managers and users were developed in English and then translated into the other languages. As with the quantitative work, a strict quality control procedure was used to ensure that the translation was faithful to the English original and that specialist vocabulary had been translated correctly.

The interviews and groups were conducted by researchers from the local TNS or partner research agency, and recorded for analysis. Agencies were provided with a report template to ensure consistency, and each produced a written report in English. These reports were then sent to TNS UK for broader analysis by the UK qualitative project team.

Appendix B: Demographic profile of PAC users and library users compared with the general population
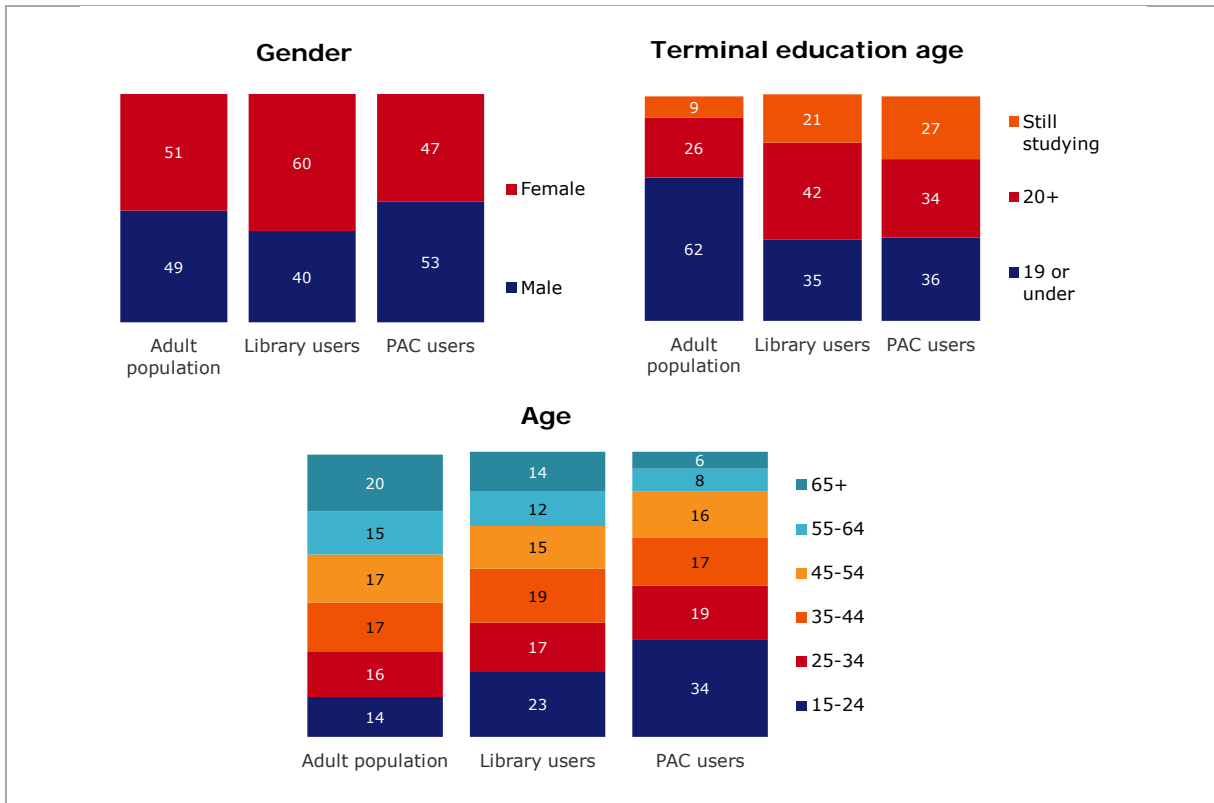
Source: Omnibus D1 Gender, D2 How old are you ? D4 How old were you when you stopped full-time education? ;
Library survey – D1 Gender ; D2 How old are you?; D4 How old were you when you stopped full-time education
Base: Omnibus - Adult population(17816); Library survey - Library users (12357); PAC users (11716)

On other demographic measures:

- 2% of library users were migrants, rising to 5% of PAC users
- 1% of library users were from ethnic minority groups, rising to 2% among PAC users
- 0.3% of library users were from the Roma community, rising to 0.4% among PAC users