

## SECTION 3: FUTURE TRENDS REPORT

The Consultant team was charged with these primary tasks related to library trends pertinent to the Round Rock Public Library:

- Statement of trends affecting the future of libraries in general.

The future of the public library is affected by cultural and technological change, which in turn affects how public libraries are being used and the services they provide. In order to address this task, the Consultant team assembled data for consideration by RRPL in several distinct areas, addressing national and state-wide trends in technology, and trends affecting the future of public libraries in general, including:

- Trends in Library Customers;
- Trends in Library Service Delivery;
- Trends in Library Technology; and
- Alternative Facility/Service Outlet Models.

Subsections for each of these headings are included in this Section of the Report.

### TRENDS IN LIBRARY CUSTOMERS

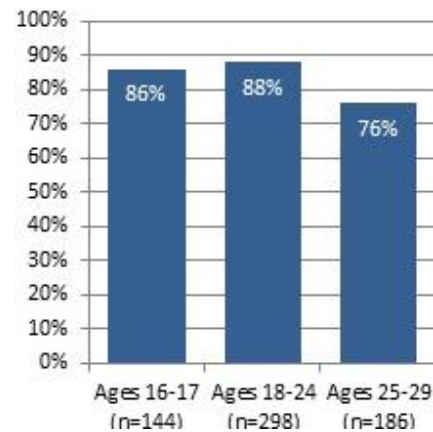
Library customers are a subset of the typical consumer in the U.S., influenced by and influencing trends in all aspects of life in this country. Key American consumer shifts in the past five years include:

- The aging of America – the baby-boomer population is now turning 65;
- An increase of multi-generational households;
- Mothers having children later in life;
- Digital diversity and mobile movement – more and increasing ways for consumers to connect to businesses and each other;
- Consumer trends – green awareness and healthy lifestyles.

### Trends in Library Customers

According to the Pew Research Center (*Younger Americans' Reading & Library Habits*), the *Facebook* generation has not stopped reading anything longer than 140 characters. The report from the Pew Center reveals the role of books, libraries, and technology in the lives of young readers, ages 16 to 29, which states "We found that about 8 in 10 Americans under the age of 30 have read a book in the past year. And that's compared to about 7 in 10 adults in general, American adults. So, they're reading – they're more likely to read, and they're also a little more likely to be using their library."

**Reading Is Not Disappearing.** According to the Pew study, 83 percent of Americans aged 16 to 29 read a book last year compared to 78 percent of all Americans over 16. High school and college age respondents were most likely to have done so and adults aged 65 and older the least likely. Though much of the reading by younger adults is for school or work, about three in four say they read for pleasure or to keep up with current events.



Graph showing how younger Americans are reading more books.

Source: Pew Internet & American Life Project, 2012.

The Pew report also asked about public library usage, finding 60 percent of Americans under 30 have used a library in the past year. The most common library user is a high school student, at a rate of 72 percent. They are also the ones most likely to borrow the last book they read – as opposed to buying the book – and are most likely to solicit book recommendations.

**Use of the Public Library.** *Library Journal* surveyed 3,506 people in late 2012, with 2,216 stating they were active library users, and 1,290 stating they were not. Of the total sample, 63 percent used the library in the last six months, either in person or online. In keeping with past findings, women are more likely to use the library (69%, compared to 55% of males). While there were no significant differences when age was considered, the likelihood of library use rose with higher incomes and more education. With regard to age, 59 percent of retirees use the library, while 69 percent of those not working by choice (homemakers, stay-at-home parents, etc.) use the library. The percentage of full-time workers using the library breaks down between 62 percent of full-time workers and 72 percent part-time. The survey also analyzed data by race/ethnicity. Non-whites were more likely to use the library than whites in the last six months. There were 62 percent of whites, 67 percent of blacks, 77 percent Asians, and 63 percent Hispanics reporting use of the library.

**Age of Public Library Users.** A notable demographic trend is the increasing life expectancy and growth of our aging population. Health care is the fastest growing sector of the U.S. economy, as well as in many other countries. Research continues to advance society's ability to fight infectious diseases and chronic illnesses, and this continued improvement and access by ever-larger populations ensures that those who are healthy will continue to live longer. For example, in 2010 an individual who reaches age 65 would expect to live until age 90. By 2020, that individual could expect to live into their upper 90s. And by 2030, the life expectancy for an individual living beyond age 65 will likely exceed 100.<sup>1</sup>

<sup>1</sup> Nelson, A. C., & R. E. Lang, (2011). *MEGAPOLITAN AMERICA: A New Vision for Understanding America's Metropolitan Geography*. Chicago, IL: American Planning Association Planners Press.

## TRENDS IN LIBRARY SERVICE DELIVERY

The way that libraries now deliver service and the tools they use are changing. Here is what we see with increasing frequency:

**Mobile Library Service.** Once a staple of library service in many locales and developing trend, even in urban environments — is the traveling library, i.e. the bookmobile. Bookmobile service goes to the user/potential user and can be a great source of pleasure, enjoyment, and enrichment. There continue to be target populations in nearly every community that have difficulty visiting the library. The indigent, elderly, and children most often fall into this segment of the population. Mobile library service delivery is one solution to these issues.

**Service Points.** Circulation and Reference service desks are getting smaller – with the Reference Desk even going away, replaced by library staff that meet and greet the customer near the entrance and are constantly walking the floor to provide assistance. Many of the staff has a hand-held navigation device with them at all times, e.g. a tablet or smart phone so they can provide quick and accurate service.

**Staff Identification.** One other trend, not yet fully realized by those in authority, is identifying the staff without them carrying a sign that says “I am a staff member.” One common way this is being achieved – at no or minimal cost to the staff – is through wearing similar apparel, such as a “uniform” of sorts. A standard in many retail establishments – and with the public library being in the retail business – easily identifiable staff becomes “walking signage,” reinforcing the services the library is delivering.

**Collection Development.** Patron-Driven Acquisitions (PDA) is an acquisitions model that has emerged from a combination of new electronic formats and a new collection development philosophy. The focus is on shifting from print collections with titles chosen by librarians to making thousands of e-books available and letting the purchasing choices be made by the library customers.

**Merchandising Library Materials.** Books, CDs, DVDs, Playaways, and the like are being merchandized, often face-out – in an approach much more like upper end bookstores. The arrangement of the book collections are moving away from the traditional Dewey Decimal Classification (DDC) to subject groupings along the Book Industry Standards and Communications (BISAC) or subject approach, e.g. Travel, Cooking, World History, Business Management, etc. Another aspect of this trend is the disappearance of the 84-inch high book stack, replaced with 72-inch high or even shorter, e.g. 66-inch or 60-inch high.

**Audio-Visual Materials.** Media formats are changing. Videocassettes, a must have format as recent as five years ago, will soon be in short supply. Books-on-CD are rapidly replacing books-on-tape. Now, hard media (CDs and DVDs) are giving way to electronic distribution, i.e. downloadable media. However, libraries are struggling with obtaining access to electronic materials and offering them to their users, due to licensing issues and price point.

**Vinyl Records.** When it came to music sales in 1983, CDs were just coming of age, digital formats were a futuristic myth, and vinyl albums and cassettes reigned supreme. Now 30 years later, vinyl albums are coming back to reclaim their once coveted position of superior music formats. According to market research company the NPD Group, iTunes has been the biggest music retailer in the United States since 2008 and claimed 29 percent of all music sold in all formats the second quarter of 2012. CDs sit second in the national rankings, but vinyl albums could soon replace them. “CD sales are going down, and vinyl sales are going up,” said Paul Mason, manager of Waterloo Records. “CDs still sell more than vinyl albums, but they could meet in the middle soon.” Mason said vinyl albums made up 27 percent of the store’s total sales in 2012 – an increase from previous years. He said CDs are still the top sellers at 54 percent of the store’s total sales, but that number is slowly declining.

**Programs.** Programming is one of the fastest growing and most appreciated services. This is not a new service – but with the extended life span where 80 is the “new” 65, the increasing number of potential customers with more and more discretionary time is very fertile ground for more and more programs. Whether planned and staged by the library, or simply providing the space for others, libraries are providing more programs.

**Maker Spaces.** A maker space, a co-operative do-it-yourself lab that supports creation and invention, is yet another manifestation of technology and the desire of people to create and develop their ideas and dreams. Especially for teens – but not to the exclusion of adults and older children – maker spaces are emerging in public and academic libraries across the U.S.

**Technology.** Electronics and information technology continues to change ever so rapidly. Having dual workstations where two customers can work together – either with one monitor and two keyboards or two of each – manifests the service delivery trend. Collaborative stations, where three to five persons can work together, is another developing trend.

With laptops going the way of the hardwired desktop computer – slowly being replaced by tablets – every flat surface in the library becomes a potential workstation. Now available are small footprint devices that provide secure storage, hardware, and re-charging capabilities for tablets or laptops. Libraries that have moved in this direction report no problems and very little damage or theft.

## TRENDS IN LIBRARY TECHNOLOGY

The public's expectations for library technology are often shaped by what they experience in other everyday business transactions, such as when they use their debit card to purchase gas and get a video message and a receipt while at the pump. Or, when they access an ATM machine a thousand miles from home to make a deposit into their account and/or withdraw hundreds of dollars in a matter of seconds.

For many years, public libraries have had online accessible catalogs that replaced the card catalog. The automated bibliographic inventory system quickly followed, resulting in checking-out library materials via the computer. And now, those same materials can be renewed and reserved online for ones home, office, or smart phone at the vast majority of public libraries in the country. So generally, public libraries are becoming centers of high technology, including:

- In-house computing;
- Support for mobile computing, and
- Embracing eBooks.

Technology is changing the landscape for how physical materials are handled – from touchless radio frequency identification (RFID) circulation systems to machines that help automate the process of returning and sorting physical materials.

**RFID.** Radio frequency identification is fast-becoming common place in public libraries, as it provides the ability to reserve, sort, and secure materials better than ever. With RFID, if a library customer knows the title of a book or looks it up in the catalog, he or she can use his/her mobile device to locate the exact location of the item on the shelf.

Tied to RFID is another trend – more for the “back of house” operations – the automated materials handling system (AMHS). A robotic-type system that speeds up the process of returning

materials for the customers to use again, it reduces staff time devoted to the intake and re-shelving processes. RFID also aids with the customer self-check systems, although a library can have self-check without RFID.

### Use of Technology in Other Libraries

The Consultants present a brief sampling of some developments that we believe hold promise in the not too distant future for the RRPL. Examples of other public libraries employing useful technology applications include:

- **Tablets for In-Library Use.** Now available are small-footprint devices that provide secure storage, hardware, and re-charging capabilities for tablets and laptops. Libraries that have moved in this direction report no problems and very little, if any damage or theft;
- **Dual & Collaborative Workstations.** Many libraries have allocated space for both dual and collaborative workstations in their facility,
- **Maker & Hacker Spaces.** A physical space where people can meet and work on their projects, either collaboratively or individually. One of the key pieces of technology in these environments is a three-dimensional printer – a high-priced device as yet rarely available to the average consumer;
- **Cable Television Studio.** City-owned cable television production facilities have fulfilled the role of maker space for Teens and other community members.
- **eCommerce.** Using a Square register to accept credit or debit cards virtually anytime, anywhere with their mobile device, Library customers can pay their overdue materials account while traveling, or while waiting for a table at a local café;
- **Arduino.** Arduino is an open-source electronics prototyping platform based on flexible, easy-to-use hardware and software. It is intended for artists, designers, hobbyists, and anyone interested in creating interactive objects or environments. Arduino can sense the environment by

receiving input from a variety of sensors and can affect its surroundings by controlling lights, motors, and other actuators. The microcontroller on the board is programmed using the Arduino programming language (based on Wiring) and the Arduino development environment (based on Processing). Arduino projects can be stand-alone or they can communicate with software running on a computer (e.g. Flash, Processing, MaxMSP); and

- **Infor.** Infor is an integrated system that provides traditional bibliographic and inventory control systems, as well as a very strong platform of management tools that can, for example, enable a library administrator to know what hour of the day and/or day of the week is the busiest during which month of the year;
- **Google Translator.** Columbus Metropolitan Library, Ohio – [columbuslibrary.org](http://columbuslibrary.org)
- **Mobile Phone App.** New York Public Library – [nypl.org](http://nypl.org)
- **Social Media.** Extensive use of social media: Frisco Public Library – [friscoinlibrary.com](http://friscoinlibrary.com)
- **Websites.** Good examples of website utility include:
  - Simple, easy to use: Grand Rapids Public Library, Michigan – [grpl.org](http://grpl.org)
  - Hours of operation listed clearly and slide show on homepage: Dallas Public Library – [dallas2.org](http://dallas2.org)
  - Interactive menu: San Antonio Public Library – [mysapl.org](http://mysapl.org)

### Library Technology Consortia

A national and international library consortia movement began in the 1990's. Now, library consortia represent their members to negotiate licenses for eBooks and eJournals, share downloadable and hard format collections, and provide timely user access across multiple libraries. Estimated savings to libraries from consortia work is in the hundreds of millions of dollars, through scaled-up, highly cost-effective licensing and resource sharing arrangements.

**Edge.** The Edge Coalition was created through a collaboration of organizations dedicated to the success of libraries. Edge is led by the Urban Libraries Council and funded by the Bill and Melinda Gates Foundation. Some of its members include the American Library Association, Public Library Association, OCLC, LYRASIS, TechSoup Global, and Texas State Library and Archives Commission.

In the initial stages of the program, Edge Benchmarks, of which the New Braunfels Public Library has been one of the participating libraries, has been pointing to practices that help libraries evaluate and continually improve public technology services in their communities. The benchmarks are divided into three main categories that assess:

1. **Community Value:** Benchmarks 1 through 3 address external practices that connect the library to the community;
2. **Engaging the Community & Decision Makers:** Specific programs, services and supports that enable people to get value from their use of technology are outlined in Benchmarks 4 through 6; and
3. **Organizational Management:** Internal management and infrastructure are covered in Benchmarks 7 through 11.

Within these categories are a series of indicators to measure specific activities. The Edge Coalition has arrived at these measures by surveying current library practices and collecting feedback from library leaders across the country. The initial version of the benchmarks has been released. See [www.libraryedge.org](http://www.libraryedge.org) for additional information.

### ALTERNATIVE FACILITY MODELS

A host of Alternative Facility Models could be considered for Round Rock over the course of developing the Strategic Master Plan. Several of these alternative service outlets include:

**After School Center** is within a typical branch library. The After School Center will be staffed with the regular branch library staff. Its hours of service will be those hours that serve the total service area population.



*Bookmarks,  
A Children's Library,  
NorthPark Mall,  
Dallas Public Library*

**Children's Library in a Shopping Mall** would be located in a leased

storefront in an enclosed shopping mall or a storefront in a retail center. The size would range from 1,000 to 2,000 square feet. The collection would feature books and media for children from toddlers to fifth grade, and a small parenting collection. There would be computers sized for children of the same age of the collections. Hours of operation would be dependent upon location.

**Joint-Use Library** is a facility that typically serves two, or in some cases three, different client groups. Those client groups can be:

- Public Library customers;
- Community College students, faculty, and staff;
- Elementary or Secondary School students, faculty, and staff; and
- Community Center customers.



*Discovery Green Express Library,  
Houston Public Library*

**Express Library** is a 450 square foot facility in downtown Houston, adjacent to the Convention

Center and a large office complex. There are 10 laptops and four computers available to be used for periods of two hours, and a small collection of books suitable for browsing. In the last fiscal year, 696 citizens used the computers.

**Leased Space for Public Library Buildings.** The leasing, or renting, of space for a branch library facility is quite common. We estimate that about 10 to 15 percent of all branch libraries in the country are in leased space. There are usually three primary reasons that a community would elect to lease space for a branch library:

1. Capital funds are not available to build;
2. "Sudden" growth in an area of a city requires "immediate" action in order to meet community needs; or
3. The intended, or desired, location of a branch library is in a neighborhood/community area that is in, or perceived to be in transition and a sizeable capital investment is ill advised.

**Public Library within a Larger Library.** The Dayton's Bluff Branch Library of the Saint Paul Public Library in Saint Paul, Minnesota is housed within the larger Metropolitan State University Library. The Dayton's Bluff neighborhood has struggled with complex issues of aging, economic divestment, and cultural change, but has many active community organizations and a beautiful location overlooking downtown St. Paul and the river basin. The branch library has 6,734 square feet of space, is open six days a week, the collection numbers 39,360 items, and has 17 computer workstations.

## Alternative Facility Models

**Public/Private Partnership** involves the City and a private concern, perhaps a real estate developer. The Rondo Library in Saint Paul, Minnesota is a wonderful example of this model. It is a 38,000 square foot branch library, with several levels of



apartments and parking above.

*Public Library at street level, housing units on upper levels, two levels of parking, all in one building*

**Special Purpose Subject/Content Library**, if like the Clayton Library in Houston, the Center for Genealogical Research, is a library with a single purpose in mind.



*Interior view of the library entrance, Dillon's Supermarket, Wichita Public Library*

**Supermarket Library** would occupy a small amount of space, approximately 800 to 1,200 square feet, near the front entrance of a supermarket. The staff would be dependent upon the hours of operation. The supermarket would likely expect the library to be open at least from 10:00 AM to 8:00 PM,

including weekends. The Wichita Public Library in Kansas has a 1,000 square foot branch library in a Dillon's Supermarket. It is averaging over 100,000 items checked-out per year. The operating cost is low; +/-2.00 FTE staff, no rental/lease costs, no utility costs. The library pays for telephone and data.

**Bookmobiles** are one of the oldest forms, if not the oldest, of Alternate Library models. They have traditionally worked best in rural areas, or for very specific sites, e.g. a nursing home. Recently, however, bookmobiles have morphed into technology buses, and both models are being deployed in urban areas, as rising gasoline prices have impacted transportation costs for lower income library users.

**Vending Library** is an automated "facility" which lends library material via a handling machine that has proved a tremendous aid in addressing underserved, or very mobile, segments of a community. Commonly referred to as a kiosk, these units require minimal staff time (only that needed to stock and restock the vending machine); no utility costs (unless there are charges for power), and no maintenance costs. A location can be just about anywhere there is an ample source of electrical power.



*Examples of book vending machine (left) and information kiosks (right)*