This page has intentionally been left blank

Disclaimer:
Whilst all care and diligence have been exercised in the preparation of this report, AEC Group Limited does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as a result of reliance on this information, whether or not there has been any error, omission or negligence on the part of AEC Group Limited or their employees. Any forecasts or projections used in the analysis can be affected by a number of unforeseen variables, and as such no warranty is given that a particular set of results will in fact be achieved.
Executive Summary

Background

Library materials in Languages Other Than English (LOTE) meet multiple needs amongst relevant communities. This study assesses drivers of demand for LOTE materials, the alignment between the current collection and user needs and the effectiveness of the current approach to choosing, sourcing and managing the collection.

LOTE Speakers

Over the last ten years, the number of LOTE speakers has increased at a faster rate than the rate of increase in the population as a whole. Within the overall total, there are large variations in the number of speakers of each language and the speed at which the number of speakers of each language is changing. LOTE speakers are not uniformly distributed across the State and there are more LOTE speakers in Brisbane alone than in the rest of the Queensland.

Future growth in the number of LOTE speakers is almost certain to be influenced by immigration policy as well as broader social and economic trends within Australia and overseas. It is likely the recent trend of migrants from an increasing number of countries will continue.

LOTE Collection

Library staff from six library services around Queensland were consulted and all provided positive feedback on the quality of the service and the ease of accessing materials from SLQ. There is consensus that without access to the central collection, smaller libraries in particular could not provide access to anywhere near the same size collection, if at all.

The risk for SLQ and the LOTE collection is that while it does an excellent job of meeting the needs of current users there are many more potential users that are unaware of the collection. Only the largest libraries consulted were actively promoting the LOTE collection while in the smaller libraries the service relied on word of mouth or borrowers taking the initiative and asking for LOTE materials. As observed in the broader community, there is a growing demand for online and electronic resources. The extent of interest varied significantly between library services due to the changing demographic profile of LOTE speakers in each area and the quality of the available Internet connection speeds.

There is currently very limited information available on the actual use of the LOTE materials once they leave the central collection. Therefore, the analysis of usage, which is a central component in determining future purchasing decisions, is based on the materials requested from the collection not their usage by members of the public. However, analysis of the available data and stakeholder consultations suggest two main ways in which the service could be improved: the first is through increased public awareness of the collection and the second through improved targeting.

Management of the Collection

The current centrally controlled approach to purchasing and managing the collection allows economies of scale and scope which are not available to library services other than in the very largest local governments. Without access to the SLQ LOTE collection many local governments would not be able to provide any LOTE resources let alone the range of material which can be provided through the SLQ collection.

Although alternative purchasing approaches including crowd sourcing offers greater flexibility, the loss of bulk purchase discounts could add to the costs of the collection. However, this is an evolving area and SLQ should continue to monitor its purchasing approach for LOTE materials to ensure it continues to receive the best value from the available resources.
Findings

The following findings can be derived from the analysis:

1) The lack of data on the use of the LOTE collection means there is only a limited understanding of the demand for LOTE services and the use of the current collection, particularly outside South East Queensland.

2) The absence of reliable loans data means that decision making regarding the development of the collection includes many uncertainties. Given the multiple demands on the limited pool of funding from which LOTE materials are resourced, the absence of reliable usage data undoubtedly weakens any case for additional expenditure.

3) There is uncertainty amongst SLQ staff about whether they should be a passive service provider or also play a role as an active service promoter. The latter role has a resource implication for SLQ but it may be that investing in greater promotion of the collection would significantly improve usage and the associated outcomes.

4) Demand for LOTE materials is complex and dynamic. It is influenced by the same drivers which impact upon collections in English and is overlayed by a series of other factors including migration patterns, the extent of exposure to libraries in country of origin and economic and educational status. The impact of these drivers is impossible to determine given current data limitations.

5) Like users of English collections, LOTE users are not a homogenous group and there are large variations in needs and expectations between and within languages, which highlights the potential benefits of developing improved connections between SLQ, libraries and users.

6) There is a practical limit on the level of service which can be provided, i.e. the English collection cannot be replicated for all languages and resources must be prioritised to maximum benefit. Decisions on how this can be achieved most effectively should be informed by usage data.

Recommendations

The following recommendations for SLQ are made in order of priority:

1) Agree a dual role for SLQ as an active service promoter as well as passive service provider. Initially, service promotion should focus on supporting libraries with large LOTE speaking populations, promoting existing services and encouraging staff visits to view the collection.

2) Develop and implement an agreed promotion program (including key performance indicators for the promotion program to monitor its effectiveness). This could include staff visits to some libraries, promotional materials and an awareness campaign.

3) Engage local language groups as a quick and low cost way of better understanding the needs of LOTE speakers, promoting the service and understanding future migration trends.

4) Identify partnership opportunities with agencies such as the Departments of Health and Education which provide other services to target groups.

5) Encourage better data capture on the use of the collection and use this information to inform future collection development alongside:
   a) Data and qualitative feedback from library staff.
   b) Feedback from language groups and related service providers.
   c) Identify a language of the year/month to provide a promotional focus.
   d) Engagement with the Queensland Office of Economic and Statistical Research and other Federal and State agencies to discuss known trends in new arrivals.

6) Undertake a small scale pilot trial of available e-content in selected key language/s to test functionality and uptake prior to committing significant sums.
# Table of Contents

1. INTRODUCTION .................................................................................................................. 1  
   1.1 BACKGROUND .................................................................................................................. 1  
   1.2 PURPOSE OF REPORT ........................................................................................................ 1  
   1.3 TERMS OF REFERENCE .................................................................................................... 1  
   1.4 ASSUMPTIONS .................................................................................................................. 1  
2. LOTE SPEAKER NUMBERS AND DISTRIBUTION .................................................................... 2  
   2.1 THE NUMBER OF LOTE SPEAKERS .................................................................................. 2  
   2.2 LANGUAGES SPOKEN ...................................................................................................... 2  
   2.3 SUMMARY ........................................................................................................................ 4  
3. THE LOTE COLLECTION ....................................................................................................... 5  
   3.1 LOTE COLLECTION POLICY CONTEXT ......................................................................... 5  
   3.2 THE CURRENT LOTE COLLECTION ................................................................................. 6  
   3.2.1 DEMAND FOR MATERIALS ....................................................................................... 7  
   3.2.2 ISSUES BY LANGUAGE ............................................................................................... 8  
   3.2.3 LOCAL GOVERNMENT LOTE COLLECTIONS ............................................................ 9  
   3.2.4 LOTE COLLECTION EXPENDITURE .......................................................................... 9  
   3.2.5 LOTE COLLECTION DECISION MAKING PROCESS ................................................... 10  
   3.3 OPPORTUNITIES TO INCREASE COLLECTION USAGE ....................................................... 10  
   3.3.1 INCREASING AWARENESS ...................................................................................... 11  
   3.3.2 ALIGNING THE COLLECTION TO LOTE COMMUNITY NEEDS ................................ 12  
   3.4 COLLECTION DEVELOPMENT OPTIONS ....................................................................... 12  
   3.5 SUMMARY ....................................................................................................................... 12  
4. ALTERNATIVE SERVICE DELIVERY OPTIONS ..................................................................... 14  
   4.1 CURRENT APPROACH ..................................................................................................... 14  
   4.2 APPROACH ASSESSMENT ............................................................................................... 14  
   4.3 CROWD SOURCING AND OTHER SUPPLY OPTIONS ...................................................... 17  
   4.4 SUMMARY ....................................................................................................................... 17  
5. FINDINGS AND RECOMMENDATIONS ................................................................................. 18  
REFERENCES ............................................................................................................................ 19  
APPENDIX A: LOTE SPEAKERS BY REGION ......................................................................... 20
1. Introduction

1.1 Background

Library materials in Languages Other Than English (LOTE) meet multiple needs amongst relevant communities including supporting new migrants, allowing established migrants and their families to retain cultural ties and providing resources for students and temporary visitors.

The 2011 Australian Bureau of Statistics census found there were approximately 445,120 speakers of languages other than English in Queensland (excluding Indigenous languages). Just as collections must be aligned to the needs of English speakers, materials in other languages must also recognise user requirements. The State Library of Queensland (SLQ) provides a central LOTE collection, which is lent out through the library network. SLQ also has a benchmark standard which encourages public library services, with a given number of residents speaking a language other than English, to purchase additional materials to supplement the central collection.

1.2 Purpose of Report

This study assesses drivers of demand for LOTE materials, the alignment between the current collection and user needs and the effectiveness of the current approach to choosing, sourcing and managing the collection. The report concludes with a series of findings and recommendations on ways in which the LOTE service can be improved.

1.3 Terms of Reference

Table 1.1 sets out the terms of reference for the study and summarises how each has been addressed.

<table>
<thead>
<tr>
<th>Terms of Reference</th>
<th>How Addressed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review of current LOTE collection usage</td>
<td>Quantitative assessment of available usage data from central collection and selected local governments, Qualitative assessment based on consultations with stakeholders</td>
</tr>
<tr>
<td>Assessment of options to increase CALD user access</td>
<td>Consultation with collection users (libraries) and comparison with State Library of NSW approach</td>
</tr>
<tr>
<td>Preparation of collection management and service delivery options</td>
<td>Assessment of several alternative management approaches against required outputs</td>
</tr>
<tr>
<td>Preparation of collection development options</td>
<td>Set of recommendations identifying prioritised actions to improve use of LOTE collection</td>
</tr>
<tr>
<td>Assessment of migration trends / implications, crowd sourced models and electronic access to e-books in LOTE</td>
<td>Demographic profile of historic and forecast migratory trends, Stakeholder consultations</td>
</tr>
<tr>
<td>Report on relevant data findings</td>
<td>Workshop presentation, This report</td>
</tr>
</tbody>
</table>

1.4 Assumptions

Throughout the following analysis, LOTE excludes Australian Indigenous languages. This decision has been made in line with the terms of reference recognising the needs of Indigenous communities are addressed through Indigenous Knowledge Centres and other targeted programs which are outside the scope of this work.
2. LOTE Speaker Numbers and Distribution

The number and distribution of LOTE speakers varies significantly across the State, reflecting historic and contemporary migration and settlement patterns. While the relationship between the number of LOTE speakers and demand for LOTE services is complex, understanding the total number LOTE speakers, the languages they speak and how this is changing is a critical step in considering the optimum configuration of future LOTE services. The following sections concentrate on State-wide trends, analysis at the local government level is available at Appendix A.

2.1 The Number of LOTE Speakers

At the 2011 census, 406,078 Queensland residents identified themselves as LOTE speakers, equivalent to 9.9% of the population, an additional 119,267 LOTE speakers from 2006 when 7.9% of the population (286,811) identified themselves as LOTE speakers (ABS 2012). Assuming no further change in the proportion of the population identifying themselves as LOTE speakers (9.9%), it would be anticipated that by 2026 they would number more than 600,000.

Figure 2.1. Observed and Anticipated LOTE Speakers

An increase in LOTE speakers does not equate to an increase in demand for LOTE materials but does establish the effective potential market for the service. In Queensland, net overseas migration has been a key driver of population growth in recent years. Underpinning much of the recent growth has been a large increase in the number of international students and business visa holders (457). Between 2003 and 2008, the three most common visa types have been overseas students, New Zealand citizens and permanent skilled visas.

2.2 Languages Spoken

LOTE speakers comprise many groups with varying needs, levels of formal educational attainment and previous, or no, experience of library services. The range of languages spoken has important implications for the future of the LOTE collection.

Migrants arriving in Australia immediately following World War II typically spoke a handful of European languages but contemporary migration patterns have significantly increased the range of languages.
The following figure shows the number of LOTE speakers in each Local Government Area (LGA), only councils with more than 1,000 LOTE speakers are included.

**Figure 2.2. Local Governments with more than 1,000 LOTE Speakers, 2011**

Source: ABS 2012

In 2011, there were LOTE speakers in 55 Queensland local governments, although 29 of these had fewer than 1,000 speakers. There were 39 LGAs with more than 100 LOTE speakers in 2011. Of those, approximately 84.0% were in south east Queensland and 47.3% in Brisbane. This illustrates the concentration of speakers in relatively few LGAs, and highlights the areas where LOTE collection promotional activity is likely to have the greatest impact. Further breakdown of the number of LOTE speakers by LGA is available at Appendix A.

The following figure shows the number of speakers of each language with more than 5,000 speakers in 2011.

**Figure 2.3. Language Other Than English Spoken at Home 2011**

Source: ABS (2012)
It is anticipated that future migration trends will continue to support the trend of an increased diversity of languages spoken as future migrants arrive from an increasingly diverse range of countries many with multiple languages.

The following figure shows the change in the number of speakers of these languages between 2006 (lower data point) and 2011 (upper data point).

Figure 2.4. LOTE Speakers 2006 and 2011

Source: AECgroup

All of the languages shown recorded an increase in the number of speakers between 2006 and 2011, except for Italian which saw a small decrease. However, there were large variations in the size of increase with 18,227 more Chinese language speakers, 20,270 Indo-Aryan speakers, 205 more Dutch speakers and 434 more Greek speakers.

This is likely to mean demand for materials in a greater variety of languages, although the proportion of speakers of a given language that use LOTE materials will vary as a result of several other factors.

2.3 Summary

Over the last ten years, the number of LOTE speakers has increased at a faster rate than the rate of increase in the population as a whole. Within the overall total, there are large variations in the number of speakers of each language and the speed at which the number of speakers of each language is changing. The implications for the LOTE collection are further complicated by the variations between the understanding and knowledge of libraries within language groups, language skills, demographic profiles and access to other sources of information.

LOTE speakers are not uniformly distributed across the State and there are more LOTE speakers in Brisbane alone than in the rest of the Queensland. Future growth in the number of LOTE speakers is almost certain to be influenced by immigration policy as well as broader social and economic trends within Australia and overseas. It is likely the recent trend of migrants from an increasing number of countries will continue.
3. The LOTE Collection

A critical factor in increasing LOTE usage is the ability to convert a LOTE speaker into a library user. The extent of the alignment between the LOTE collection and user needs is a major determinant of its usage.

3.1 LOTE Collection Policy Context

The available SLQ LOTE funds must be used to maximise community benefits and deliver outcomes which are aligned to relevant strategic objectives. The following table outlines the current strategies which must be considered in delivering LOTE services.

<table>
<thead>
<tr>
<th>Strategic Plans</th>
<th>Multicultural Services Standard 2008 - State Library of Queensland</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Populations of 2,500 or more speaking a particular language should provide its own collection of 2 items per capita for each language.</td>
<td></td>
</tr>
<tr>
<td>• Collections should be available in languages spoken within the community.</td>
<td></td>
</tr>
<tr>
<td>• Library staff should reflect the demographic profile and the diversity of languages spoken within the community.</td>
<td></td>
</tr>
<tr>
<td>• Collections should comprise:</td>
<td></td>
</tr>
<tr>
<td>o Recreational reading material</td>
<td></td>
</tr>
<tr>
<td>o Electronic resources</td>
<td></td>
</tr>
<tr>
<td>o Multilingual interfaces</td>
<td></td>
</tr>
<tr>
<td>o Language learning resources and materials for students</td>
<td></td>
</tr>
<tr>
<td>o Resources to assist multilingual communities including government publications, health and community information</td>
<td></td>
</tr>
<tr>
<td>o Audio-visual resources including music CDs and DVDs</td>
<td></td>
</tr>
<tr>
<td>o Resources describing the cultural and religious diversity and recorded history of local communities</td>
<td></td>
</tr>
<tr>
<td>• Programs and services to be provided by libraries include:</td>
<td></td>
</tr>
<tr>
<td>o Targeted events, displays and exhibitions designed to reach diverse audiences and demonstrate links with the library</td>
<td></td>
</tr>
<tr>
<td>o Celebrations for relevant key events such as Harmony Day, Citizenship Days, festivals for particular CALD groups</td>
<td></td>
</tr>
<tr>
<td>o Library displays and information outlets across the community</td>
<td></td>
</tr>
<tr>
<td>o Bilingual story time sessions in the library</td>
<td></td>
</tr>
<tr>
<td>o Literacy and conversation classes</td>
<td></td>
</tr>
<tr>
<td>o Specific programs to appeal to targeted segments within the CALD community</td>
<td></td>
</tr>
</tbody>
</table>
### Strategic Plans

#### Multicultural Action Plan 2012-2013 - State Library of Queensland

- The Action Plan establishes a range of actions, including:
  - Promoting and supporting access to collection materials and e-resources for CALD clients
  - Continuing to acquire and distribute a LOTE collection to all Queenslanders through public libraries
  - Ensuring that public and staff computers are adapted for different languages
  - Including English as a Second Language (ESL) and community focused modules into online social networking training package *Looking @ 2.0*
  - Continuing to support the MyLanguage website and work with public libraries and CALD communities to source Queensland content for MyLanguage
  - Prioritising digitisation of Queensland migration and South Sea Islander heritage material held in SLQ's John Oxley Library
  - Ensuring SLQ's corporate communications (What's On and SLQnews) optimise accessibility for CALD communities
  - Embedding the SLQ brand *all yours* and ensuring the needs of CALD communities are considered
  - Establishing a baseline and suitable methodology for regularly measuring CALD visitation to SLQ


- Suggested approaches to community consultations to inform LOTE decision making include:
  - maintaining contact with community groups and organisations such as Neighbourhood Centres, Migrant Resource Centres and Ethnic Community Councils
  - maintaining contact with Community Settlement Officers (most of whom are attached to the centres listed above)
  - maintaining contact with community based and public sector organisations who provide service to the frail aged, younger disabled and their carers
  - maintaining contact with service providers who work with new arrivals and refugees
  - maintaining contact with service providers who work with the housebound
  - utilising contact with English language teaching programs such as those provided by TAFE and also any community based English language instructors
  - utilising contact with International Students' organisations such as the Brisbane Council for International Students
  - attending various ethnic community functions where appropriate
  - utilising ethnic community communication channels such as newsletters and radio
  - arranging cross-cultural awareness training for library staff
  - arranging “open days” for specific language groups
  - organising displays in conspicuous areas and at significant local events

#### Standards and Guidelines for Australian Public Libraries - ALIA

- One of the guidelines is centred on services for culturally diverse communities. The guidelines specifically state that for each library:
  - A collection for a particular language group should exist where there are at least 1,000 residents speaking that language at home
- Collections are easily accessed by CALD customers e.g. bilingual staff, cataloguing in first language, signage

Sources: SLQ, ALIA

The key implications are that as well as providing access to LOTE materials, there is a well understood need to promote the materials. It is also apparent there are many connections between the LOTE collection and other multicultural policies and services which create opportunities for shared promotion and service delivery.

Discussions with the State Library of NSW suggest they maintain a smaller LOTE collection than SLQ but place a significantly greater emphasis on raising awareness amongst libraries and collection users. Much of their promotion activity is undertaken in partnership with other government and not for profit service providers.

### 3.2 The Current LOTE Collection

As of 30th June 2013, there were a total of 80,292 items in the SLQ LOTE collection, equivalent to one item to every 6 LOTE speakers. Public libraries are able to choose LOTE materials either by accessing the SLQ collection in person at Cannon Hill, Brisbane or by completing an online request form. Materials usually arrive within a week of the request being received and loans are for up to 12 months. The following figure shows the 2012/13 collection make up by item category.
Adult Fiction (AF) accounts for more than half of the entire collection while non-print materials (DVD’s, CD’s and Talking Books) make up only 4.4%. This distribution is similar to that seen in the general collection with an ongoing shift away from Adult Non-fiction (ANF) items outside of specialist areas such as cooking and gardening and the growth of Adult Fiction (AF) and electronic media. Data on the collection has only been captured recently and so trend information is unavailable.

Between 2008/09 and 2012/13, the size of the collection has been reduced by 18,995 items or 19.1%. The reduction in collection size reflects an active de-selection of unused languages and poor quality items as well as improved holdings information following the recent transfer to a new library management system.

3.2.1 Demand for Materials

The following figure shows the number of issues made from the central collection and the relationship between issues made and the number of LOTE speakers. Ideally, data on the use of the collection once it is in the library network would be available but this information is not currently being captured.

Figure 3.2. LOTE Issues Made from Central Collection and Loans per LOTE Speaker
There have been large variations in the number of LOTE issues made, from 48,449 in 2005/06 to 68,520 in 2006/07. More recently, there has been a decline in the number of issues in each of the last three years. There were 9,400 fewer issues made in 2012/13 than in 2009/10. Over the same period, the number of LOTE speakers in the community has been increasing suggesting that as well as fewer issues being made, the proportion of LOTE speakers borrowing materials is also falling.

Anecdotally, annual variations in issues made can be accounted for by factors such as library management system upgrades and delays in bulk selections. However, even if there was no change in the number of issues made over the period, given the very rapid increase in LOTE speakers over the same period this suggests libraries are engaging with a smaller proportion of the LOTE speaking population than in the past.

The reduction in issues made is likely to be as a result of combinations of key factors including:

- **Availability of alternative sources of materials**: as in the broader collection, materials are increasingly available and accessible by means other than library lending. As one example, during the consultations library staff reported very limited demand for online newspaper subscriptions noting that LOTE speakers who wanted to access foreign newspapers tended to do so at home. Printed materials can also be accessed much more easily via the internet than would have been the case until relatively recently.

- **No tradition of library based lending**: the wave of migration in the immediate post World War II period was typically from European countries with a strong tradition of library based lending. Contemporary migration patterns are much more varied and include migrants from countries that have no tradition of libraries, are unfamiliar with the concept. This highlights the need and potential pay-off from targeting promotion of the materials to key groups.

- **Limited English language skills**: some migrants arrive with basic English language skills, creating a barrier to integration. This presents an opportunity for targeted promotion and the provision of language skills development materials in the LOTE collection.

### 3.2.2 Issues by Language

SLQ have recently moved to a new library management system and so the most recent data on issues by language is from 2010/11. The following figure shows the number of issues made by language between 2005/06 and 2010/11.

**Figure 3.3. LOTE Collection Issues Made 2010/11**

Source: SLQ (2013)
Although the data is generally reflective of the distribution of LOTE speakers, issues in some languages are under or over represented for example, issues of Chinese language materials account for 8.9% of LOTE issues made while Chinese language speakers accounted for 15.7% of LOTE speakers. Issues of German language materials accounted for 7.8% of issues made while Germans speakers make up only 4.0% of LOTE speaking total. The following figure shows how LOTE usage has changed between 2005/06 and 2010/11.

Figure 3.4. Change in LOTE Collection Issues Made 2005/06 - 2010/11

Source: SLQ (2013)

The data shows some large variations in issues made between LOTE languages with 915 more Japanese materials issued in 2010/11 than in 2005/06 and 875 fewer Chinese materials issued in 2010/11 than in 2005/06. There does not appear to be a unifying driver of change in use rather each language responds to its own set of drivers.

The complex relationship between LOTE speakers and the numbers of issues made reinforces the need for sound data capture and analysis to inform future collection development decision making.

3.2.3 Local Government LOTE Collections

The State Library of Queensland Local Government Multicultural Service Standards (2008) suggest local governments with 2,500 or more residents speaking a particular language should provide its own collection of 2 items per capita for each language. The Standards also suggest for populations over 35,000, one of the qualified librarians should be a specialist position to suit the demographic needs of the community.

Although these Standards are in place, consultations with selected local governments suggest that only the very largest library services are able to commit their own resources to providing a LOTE collection. Even in examples where the library had its own LOTE collection, there were insufficient resources to provide the breadth of collection needed and the SLQ LOTE collection made up for the resulting collection shortfall.

3.2.4 LOTE Collection Expenditure

The following figure shows LOTE expenditure by language in 2011/12 and 2012/13. These figures are exclusive of processing costs which are estimated to be approximately 25% of the item purchase costs.
The LOTE collection is funded from the same funding allocation as database renewals, audio books and the literacy collection. Funds for the LOTE collection are therefore influenced by the relative priority of the LOTE collection relative to the other expenditure items.

There was an apparent reduction in LOTE Collection expenditure between 2011/12 ($250,000 excluding processing costs) and 2012/13 ($207,000 excluding processing costs). However, it should be noted that during 2011/12 there were an extraordinary allocation of surplus funds of approximately $40,000 allocated to LOTE Collection purchases. When this is considered, the budgeted expenditure across these two periods is relatively even.

3.2.5 LOTE Collection Decision Making Process

The current approach to managing the LOTE collection takes into account a large number of factors including the number of issues made from the central collection in the previous year, the condition of the existing collection, informal feedback from libraries as well as the available financial resources. The lack of data on how the LOTE collection is actually used and limited feedback from library staff means that the process is difficult to align with changing community needs. As the number of languages spoken increases, the available resources are increasingly stretched.

3.3 Opportunities to Increase Collection Usage

Consultations were undertaken with six local government library services across Queensland as well as with the equivalent service at the State Library of NSW (SLNSW). The consultations found there were large variations in the ways in which the LOTE collection was used.

The local government library services consulted were:

- Brisbane City Council.
- Cloncurry Regional Council.
- Gold Coast City Council.
- Mackay Regional Council.
- Scenic Rim Regional Council.
- Whitsunday Regional Council.
The local governments were chosen to provide a sample of the varying needs of library services for LOTE materials across the state and ensure the review considered a range of perspectives.

Generally, where LOTE speakers accounted for a large proportion of the resident population LOTE materials were promoted heavily including prominent displays in the library, active promotion by staff and coordinated events with local language based community groups to promote library services including the LOTE collection. Where LOTE speakers accounted for a smaller share of the local population LOTE materials were much less well publicised and the LOTE collection was run almost as a personal service to library users who specifically requested access to the collection.

Consultations with SLQ staff, LOTE collection users and LOTE service providers in other jurisdictions suggested there were two primary ways to increase LOTE usage:

- Increase awareness of the collection.
- Improve the alignment between user needs and the collection.

Given the current lack of promotion of the collection, there is limited understanding of the potential level of demand in the community. Further, the absence of LOTE collection usage data means there is limited understanding of which components of the LOTE collection are actually being used. Only once the use of the collection and the demand in the LOTE community are understood should any changes be made to the LOTE collection.

### 3.3.1 Increasing Awareness

Increasing awareness relates to awareness both amongst staff and potential users. Currently, in smaller library services in particular there is limited understanding of the LOTE collection and as a result it is not heavily promoted. Library users who take the initiative and ask for LOTE materials receive a very high level of service but potential users, who may be unaware the collections exists, or who are hesitant about asking are unlikely to access the collection.

Consultation with SLNSW found a different approach to managing and promoting the collection. SLNSW has a much greater focus on promoting awareness of the LOTE collection amongst library staff and in supporting those library staff to promote the collection to users.

SLNSW has an ongoing promotion program which is integrated with other related service providers and are heavily involved in providing support services to LOTE speakers. Promotion activities included:

- Support for library staff:
  - Branch visits.
  - Branch events.
  - Distribution of suggested titles.
- Direct Marketing:
  - Development and distribution of SLNSW published LOTE materials.
  - Engagement as part of the Multicultural March 2014 event.
  - LOTE bookmarks distributed in branches.
  - LOTE branded boxes for transporting materials to branches.
  - Billboard advertising in key areas.

SLNSW has a smaller collection than SLQ but has been able to leverage funding from other streams (multicultural events, health support, etc.) to make a greater commitment to increasing the use of the existing collection.

There appears to be some uncertainty in SLQ about the role of the LOTE service. Staff are reticent to be seen to be overly prescriptive when dealing with libraries. It currently provides a high standard of service but undertakes little proactive promotion activity. If promotion and awareness raising are part of its remit these need to be resourced and included in appropriate performance indicators.
3.3.2 Aligning the Collection to LOTE Community Needs

Having increased awareness of the LOTE collection, it is essential the collection itself is reflective of community needs. Again there are two components to this:

- **Understanding of the LOTE community’s needs:** one way to address this would be to conduct a survey of users but this would be expensive and difficult to manage to generate a statistically significant result for all languages. A more effective solution would be to engage with language groups. This approach would not only allow SLQ staff to promote the LOTE collection but also to gather invaluable feedback direct from the community on their needs and expectations. By utilising these group’s existing networks SLQ can access a low cost and direct means of engaging the key language groups to understand what they need from the LOTE collection.

- **Positioning the collection to reflect needs:** only once the needs of the LOTE community are understood can work begin to realign the collection. The current approach is based on loans made from the central collection but there is a risk this is misrepresenting actual demand.

3.4 Collection Development Options

Generally, it seems that the LOTE collection trends seen in the English language collection are being replicated in the use of the LOTE collection. Fewer adult non-fiction materials is a primary trend being observed in libraries across the developed world as libraries shift to in demand titles (typically fiction) and non-fiction readers access information through the Internet.

However, these macro trends are complicated by the variety of ways in which the LOTE collection is used. Consultations suggest strong demand for materials to support English language skills in adults and to build technical language skills to support employment opportunities. It is important to recognise the variety of uses of the LOTE collection.

The currently available LOTE collection use data does not indicate whether items are being used because they are what users want or if they are being used because they are the only materials available. Feedback from the libraries suggested there was currently unmet demand for:

- Materials in Maori and languages which have an oral tradition.
- DVDs in various languages but particularly Indian languages.
- Ebooks and other online resources such as magazines.

In each case, there are operational issues with meeting this demand however that is not to say these cannot be overcome. However, before committing significant amounts of additional expenditure to these items it is important to be confident that this is aligned to genuine user needs.

Libraries do not currently record the use of the LOTE collection, the only available data is on loans out of the central collection. This is a major limitation as it is impossible to understand how each title is being used.

3.5 Summary

Feedback from users suggested the LOTE collection is well managed. All of the library staff consulted provided positive feedback on the quality of the service given and the ease of accessing materials. There is consensus that without access to the central collection smaller libraries in particular could not provide access to anywhere near the same size collection, if at all.

The risk for SLQ and the LOTE collection is that while is does an excellent job of meeting the needs of current users there are many more potential users that are unaware of the collection. Few of the libraries were actively promoting the LOTE collection which often seemed to rely on word of mouth or borrowers taking the initiative and asking for LOTE materials.

As observed in the broader community there is a growing demand for online LOTE resources. The extent of interest varied significantly between library services due to
changing demographic profile of LOTE speakers and the quality of the available Internet connection speeds.

There are two main ways in which the service could be improved: the first is through increased public awareness of the LOTE collection and the second improved targeting of the collection. Within these two areas there are a series of actions which could be undertaken and these are set out below:

- **Increased public awareness:**
  - Increased public library staff awareness of the LOTE collection.
  - Increase formal and informal promotional activity in public library branches.
  - Increase engagement with cultural and language support groups and utilise their networks in the community to better understand demand.
  - Engage with other relevant agencies providing related services.

- **Improved targeting of the LOTE collection:**
  - Encourage libraries to record loans data and use this to inform collection development.
  - Engage public libraries as materials are returned to SLQ in order to assess use of the collection.
  - Engage with cultural support groups to gather feedback on the collection and to identify emerging trends.
4. Alternative Service Delivery Options

The following sections map the current LOTE collection management process and alternative structures. Each approach is then scored against a set of assessment criteria to identify which best meets the needs of users.

4.1 Current Approach

**Figure 4.1. Current SLQ LOTE Collection Management Structure**

Comparison with models used in other jurisdictions are complex due to variations in the ways that library services are funded in each state which mean that approaches to the LOTE collection used in NSW are not transferable to the Queensland context. It is more informative to consider the strengths and weaknesses of alternative approaches outside the confines and what happens elsewhere. Alternative management options include:

- Allocating the available funds to libraries using an appropriate funding distribution mechanism and mandating the purchase of LOTE materials.
- Using a crowd sourced supply model, where rather than use traditional supplier channels, SLQ would advertise the need for materials in various languages and wait for suppliers to emerge that could meet parts of their requirements.
- Allocating the available funds to libraries using an appropriate funding distribution mechanism and allowing each library service to decide how to spend the funding.
- Creating a Steering Group to provide input to the collection management process.
- Develop a contributions model requiring all local governments to contribute to the LOTE collection.

4.2 Approach Assessment

The following table summarises the outcomes of a SWOT analysis which was informed through discussions with stakeholders and analysis of current lending patterns.
<table>
<thead>
<tr>
<th>Approach</th>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
</table>
| Current approach                             | • Provides access to a breadth and depth of collection which most local governments could not afford to provide  
• Efficient process which quickly provides materials to readers  
• Library users can access the same service anywhere in the State | • Limited data available on LOTE loans made, only resources provided from the collection  
• Large variances in how services are promoted and user awareness  
• Very limited online availability | • Increasing awareness could expose a large number of LOTE speakers to a collection they do not know exists  
• LOTE can be a very effective way of introducing young readers to the library and the full range of services on offer | • Number of languages is increasing  
• There are limited supplies of materials in some key languages |
| Allocating Funds to Local Government (mandated LOTE expenditure) | • Delegates decision making to people on the ground that know the market  
• Reduced costs of running centralised function | • Funding would be very little in smaller local governments  
• Lose economies of scale and market power  
• Utilisation would be much lower | • Collection can be tailored to specific needs/demand | • Loss of bulk buying discounts  
• No investment in LOTE collection  
• Library no longer access point for LOTE materials  
• Some users excluded due to high costs of purchasing materials privately |
| Allocating Funds to Local Government (no mandated LOTE expenditure) | • Local government library services would be free to allocate resources to the highest priority areas  
• Reduced costs of running centralised function | • LOTE expenditure would be almost certain to fall as many local governments would not receive enough to purchase a single item and materials in English are likely to be borrowed more frequently than LOTE  
• A segment of the community may be excluded from the library  
• The broader benefits of LOTE materials (social and economic capital, diverse and integrated communities) may be diminished | • Increased expenditure on the highest priority collection needs | • Loss of bulk buying discounts  
• Significantly less LOTE expenditure with materials only available in a few SEQ libraries |
| Crowd Sourced Model                          | • Broaden access to materials  
• Potentially some cost savings | • Additional management costs of overseeing new and unknown suppliers  
• Suppliers may be unfamiliar with SLQ requirements | • Crowd sourced models can identify suppliers with increased access to hard to source materials | • Suppliers have not been vetted through the usual panel process  
• Uncertainty around quality of materials and reliability  
• Loss of relationships with suppliers |
<table>
<thead>
<tr>
<th>Approach</th>
<th>Strengths</th>
<th>Weaknesses</th>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moving to an entirely online</td>
<td>• Aligned to key social trends in the way members of the community expect</td>
<td>• Excludes users in areas with poor internet connectivity</td>
<td>• Lower costs to transport</td>
<td>• Some users may be excluded</td>
</tr>
<tr>
<td>medium</td>
<td>to access information</td>
<td>• Excludes users with no access to the required hardware</td>
<td>• Potential to meet demand for magazines and newspapers</td>
<td>• Some users value access to printed materials</td>
</tr>
<tr>
<td></td>
<td>• Materials can be accessed simultaneously by multiple users</td>
<td>• Limited supply of materials in electronic formats (particularly for some</td>
<td>• Not all materials are available in electronic formats</td>
<td>• Not all materials are available in electronic formats</td>
</tr>
<tr>
<td></td>
<td></td>
<td>languages)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop contributions model</td>
<td>• Increased resources for LOTE collections</td>
<td>• Very limited funds available for library collections and would be removing</td>
<td>• Closer match between community profile and collection</td>
<td>• Loss of bulk buying discounts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>funds from other areas of the collection</td>
<td></td>
<td>• Would need substantial increase in contributions to provide the same service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Transaction costs to administer and collect</td>
<td></td>
<td>• Difficult to realign collection in regions with small numbers of LOTE speakers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The analysis shows that the current model provides the optimum structure within the existing funding framework. Under a scenario where significant additional funds were available, a delegated model would offer greater opportunities to tailor the collection to specific communities but as with the rural libraries it is apparent that at this scale and with the available resources a centralised model works best.

4.3 Crowd Sourcing and Other Supply Options

Crowd sourcing describes the process whereby services or materials are sought from the online community. In the LOTE context this would involve seeking community inputs on the best sources for LOTE materials. The concept developed out of difficulties in accessing LOTE materials, and where materials are available the costs are a major barrier to expansion of the collection. Any mechanism which could increase the range of materials available and/or make these materials available at a lower cost would be highly valuable.

SLQ currently utilise a panel of materials providers. It is understood from consultations that the pool of potential suppliers is limited given the specialised nature of these materials. During consultations with libraries using the collection, it was mentioned that SLQ should be working with those councils which purchase additional LOTE materials of their own to use their market power to push for more titles in languages which are hard to access. However, discussions with SLQ staff suggest that for some languages difficulties in accessing supplies simply reflects a shortage of written materials in the market place and that there would be limited benefit in adopting this approach. If more reliable usage data was available, a more effective response may be to investigate the demand and costs of commissioning works.

The benefits of the crowd sourced approach include being able to tap into a far larger supplier network than the current panel approach. This is particularly useful when trying to source materials in languages which are not widely available. However, this would involve SLQ relinquishing a lot of their current control over the transaction and the bulk buying discounts they are currently able to access. While the panel providers can be carefully vetted to ensure they are appropriately experienced and comply with relevant regulations, this is much harder to enforce under a crowd sourced model.

SLNSW use a similar approach but suggested that they were more involved in the selection process giving suppliers greater direction, not just on the language but types of materials to be purchased. In their experience, while the availability and quality of materials varied by language, good suppliers could access the majority of the materials they requested.

4.4 Summary

The current centralised structure accesses a series of economies of scale and scope which are not available to library services other than in the very largest local governments. Without access to the SLQ LOTE collection many local governments would not be able to provide any LOTE resources let alone the range of material which can be provided through the SLQ collection.

There are some opportunities to improve the administration of the collection but these are part of continuous improvement rather than indicative of any need for major structural changes. The reform which is likely to provide the greatest return on investment would be to increase public awareness. This would be expected to increase the use of the collection and highlight areas where the current collection should be focused to meet the needs of users in the future. This promotional activity should not be undertaken in isolation. Engaging existing community and government networks which provide complimentary services is likely to offer the most cost effective way of increasing understanding of the available collections and their use.

Until the extent and nature of demand for LOTE services is better understood there are risks in pursuing e-materials which may not be aligned to needs.
5. Findings and Recommendations

The following findings can be derived from the preceding analysis:

1) The lack of data on the use of the LOTE collection means there is only a limited understanding of the demand for LOTE services and the use of the current collection, particularly outside South East Queensland.

2) The absence of reliable loans data means that decision making regarding the development of the collection includes many uncertainties. Given the multiple demands on the limited pool of funding from which LOTE materials are resourced, the absence of reliable usage data undoubtedly weakens any case for additional expenditure.

3) There is uncertainty amongst SLQ staff about whether they should be a passive service provider or also play a role as an active service promoter. The later role has a resource implication for SLQ but it may be that investing in greater promotion of the collection would significantly improve usage and the associated outcomes.

4) Demand for LOTE materials is complex and dynamic. It is influenced by the same drivers which impact upon collections in English and is overlayed by a series of other factors including migration patterns, the extent of exposure to libraries in country of origin and economic and educational status. The impact of these drivers is impossible to determine given current data limitations.

5) Like users of English collections, LOTE users are not a homogenous group and there are large variations in needs and expectations between and within languages, which highlights the potential benefits of developing improved connections between SLQ, libraries and users.

6) There is a practical limit on the level of service which can be provided, i.e. the English collection cannot be replicated for all languages and resources must be prioritised to maximum benefit. Decisions on how this can be achieved most effectively should be informed by usage data.

The following recommendations for SLQ are made in order of priority:

1) Agree a dual role for SLQ as an active service promoter as well as passive service provider. Initially, service promotion should focus on supporting libraries with large LOTE speaking populations, promoting existing services and encouraging staff visits to view the collection.

2) Develop and implement an agreed promotion program (including key performance indicators for the promotion program to monitor its effectiveness). This could include staff visits to some libraries, promotional materials and an awareness campaign.

3) Engage local language groups as a quick and low cost way of better understanding the needs of LOTE speakers, promoting the service and understanding future migration trends.

4) Identify partnership opportunities with agencies such as the Departments of Health and Education which provide other services to target groups.

5) Encourage better data capture on the use of the collection and use this information to inform future collection development alongside:
   a) Data and qualitative feedback from library staff.
   b) Feedback from language groups and related service providers.
   c) Identify a language of the year/month to provide a promotional focus.
   d) Engagement with the Queensland Office of Economic and Statistical Research and other Federal and State agencies to discuss known trends in new arrivals.

6) Undertake a small scale pilot trial of available e-content in selected key language/s to test functionality and uptake prior to committing significant sums.
References


Appendix A: LOTE Speakers by Region

The distribution of LOTE speakers throughout the state is complex and influenced by contemporary and historic migratory trends and economic conditions. While some LOTE communities are well established others are much more transient.

In order to present data on the distribution of LOTE speakers between local governments, the Local Government Association Queensland (LGAQ) categories have been applied: Coastal, Resources, Rural Regional, Rural Remote and SEQ. Local governments within the Indigenous category are outside the scope of this assessment and have been excluded. The following figures plot the number and proportion of the population identified as LOTE speakers in 2006 and 2011.

**Distribution of LOTE Speakers by Local Government (Coastal)**

With the exception of Hinchinbrook, the number and proportion of LOTE speakers increased across all local governments in the Coastal category. Hinchinbrook still recorded one of the highest percentages of LOTE speakers as a share of the total population but a slight decline in numbers reflects the falling numbers of the original post war migrants which made up the significant LOTE speaking population in the region.

Source: ABS 2013
Resources areas are often characterised by high numbers of transient workers, many of which bring specialist skills and experience from around the world. It is noticeable that the highest proportions of LOTE speakers are in the service towns rather than in mining areas which are often serviced by fly-in-fly-out crew rather than permanent residents. The transient nature of these workers means that demand for LOTE materials can change very quickly, Gladstone for example saw a near doubling of its LOTE speaking population between 2006 and 2011.

Most rural regional local governments witnessed an increase in their LOTE speaking populations although there were some anomalies. Scenic Rim Regional Council saw a significant decrease in its LOTE speaking population from 2,971 in 2006 to 1,108 in 2011. Over the same period, the LOTE speaking population in the Lockyer Valley increased from 935 to 1,705. These swings are likely to be indicative of the significant transient
The workforce in these regions often employed to pick and process fruit and vegetables. Many of these workers are temporary visitors from overseas.

**Distribution of LOTE Speakers by Local Government (Rural Remote)**

Source: ABS 2013

Overall, LOTE speakers and their share of the population increased between 2006 and 2011. Rural remote local governments tend to have lower numbers of LOTE speakers but these can account for a relatively large share of the population. One LOTE speaking family moving to a region can have a large impact on the data.

**Distribution of LOTE Speakers by Local Government (SEQ)**

Source: ABS 2013

All Southeast Queensland local governments saw an increase in the number of LOTE speakers and their share of the total population increase between 2006 and 2011. Southeast Queensland has by far the greatest concentration of LOTE speakers although only in Brisbane do they account for a larger share of the population than can be observed in other local governments.
Economics, Planning & Development
Business Strategy & Finance
Community Research & Strategy
Design, Marketing & Advertising
Information & Knowledge Management