

Survey of Music Library Staff and Music Library Users in the UK and Ireland

Commissioned by the Music Libraries Trust



Executive Summary

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Executive Summary

1. Introduction

The trustees of the Music Libraries Trust (MLT) commissioned the researcher, Dr Michael Bonshor of the University of Sheffield, to run two online surveys to collect data on the work music library staff do and how it supports music-making by music library users. The project was funded by MLT and the Postlethwaite Music Foundation.

The research aims were:

- To obtain information about current use of music libraries
- To explore areas of satisfaction and dissatisfaction amongst music library service providers and service users
- To identify any requirements for practical changes in resources and service provision
- To extrapolate potential strategies for 'future proofing' music library services

The main findings are presented in detail later in this report and will be seen to focus on training and technology; access to useable printed music stock; communication of information and co-ordination of services.

In brief, the research findings include the high value of public libraries to users and concern about reductions in services; an appreciation of music library staff, alongside an awareness of a lack of training in some cases; a perceived lack of information about services and technical support for library users; a widespread preference for printed music rather than digital versions; some shortcomings in the quality of printed stock; limited cohesion in services such as the interlibrary loan system, with variations in local provision rather than a nationally co-ordinated approach; and the lack of an accessible, well-maintained national database of resources.

There are several recommendations arising from the research, and details of these are also presented later in the report. In brief, the evidence-based recommendations include exploring options for additional funding for library services and resources; increasing access to musical and technological training for music library staff; helping users to access support when using related technology; providing users with more information about music library services and resources; repair and replacement of printed music stock; updating and maintaining online services and resources; improving and updating music catalogues; developing an integrated and co-ordinated set of services and resources on a national basis.

2. The Surveys

Two separate surveys (one for music library users, and one for music library staff) were designed in consultation with the members of the Music Libraries Trust, and both surveys were subject to user testing by a small sample of music staff and library users. The research project received ethical approval from the University of Sheffield.

The surveys were designed to be anonymous for the respondents, the data was accessed only by the researcher, and all research participants will therefore be unidentifiable in any written publications or presentations arising from this project. All data was stored on a secure, password-protected Google Drive, hosted by the University of Sheffield.

The survey was circulated through leisure music-making organizations (including Making Music, ABCD, RMA, NAMHE and the ISM), and professional bodies for music library staff (including IAML and CILIP), as well as through personal contacts of the researcher and MLT board members.

Completed surveys were submitted by 551 music library service users and 45 music library staff members. Demographics and descriptive statistics were obtained from the quantitative data. Qualitative data was collected from the generous responses to the open questions included in the online surveys, and was subject to a process of thematic analysis (Braun and Clarke, 2015).

3. Demographics

3.1 Music Library Staff

The majority of the music library staff who participated in the survey were aged between 31-70 (total 88.9%), with 42.2% aged 51-60 and the remainder equally distributed between the under 30 and over 70 age brackets (Figure 1).

Just over 70% of the music library staff were female and 22% male. Two staff members preferred not to answer this question and one identified as non-binary (Figure 2).

Almost a third of the respondents had more than 20 years' experience of working in music libraries, and almost 45% had 6-20 years' experience, while 20% had less than 6 years' experience in the field (Figure 3). Responses were received from music library staff throughout the UK and Ireland, with 43% working in public libraries and 20% based in University libraries. The remainder of the respondents worked in a range of music libraries, including conservatoire, school and FE libraries, and publisher higher libraries.

Forty percent of the respondents identified themselves as professional, specialist music librarians, and 24% had responsibility for music resources whilst regarding themselves as non-specialists in music. A further 27% described themselves as general library staff with some responsibility for music.

Figure 1. Music library staff – age.

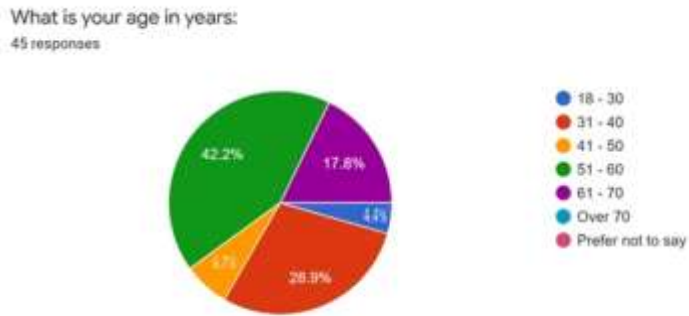


Figure 2. Music library staff – gender.

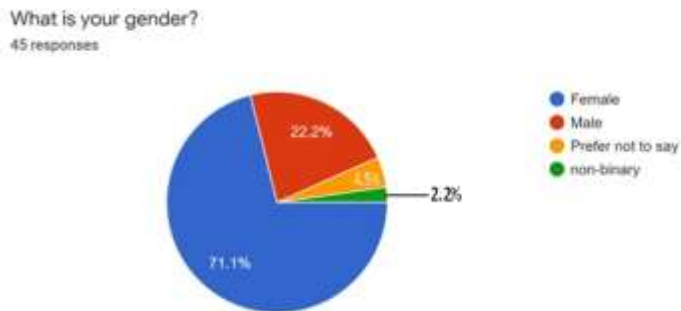
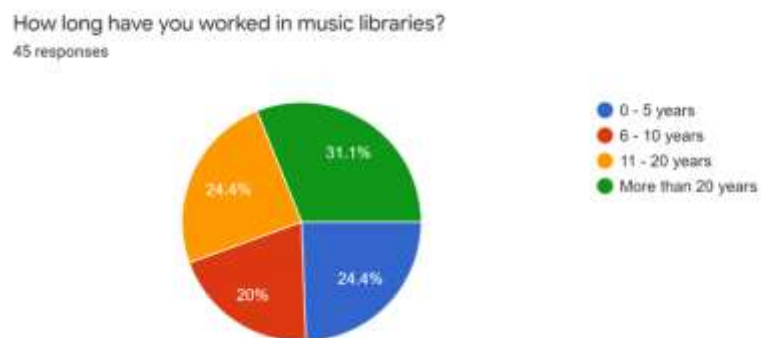


Figure 3. Music library staff – years of experience.



3.2 Music Library Users

Almost 85% of the music library users were over 50 years of age. A small minority preferred not to disclose their age, and only 15% were under the age of 50 (Figure 4). Over 60% of the music library users were female, and nearly 40% were male. Eight users preferred not to disclose their gender, one person identified as non-binary and one person as genderqueer non-binary (Figure 5).

Figure 4. Music library users – age.

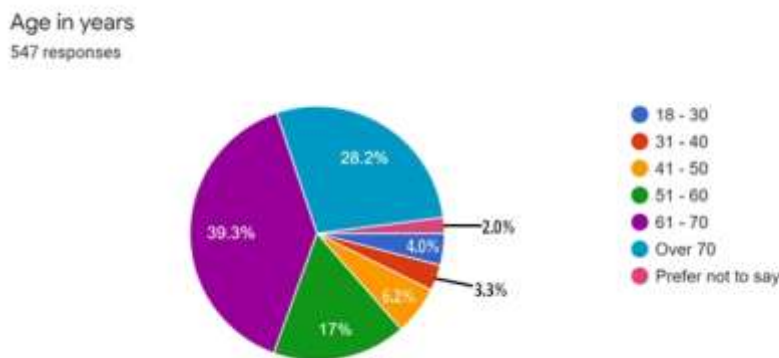
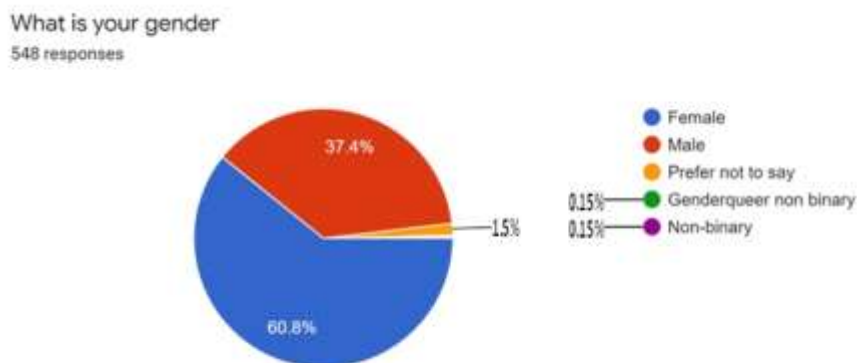


Figure 5. Music library users – gender.



Almost 50% of the users had been accessing music libraries for over 20 years, and 18% were relative newcomers with less than 5 years' experience of using music library services. The remainder had been using music libraries for between 6 and 20 years (Figure 6). Library users were located throughout the UK and Ireland, and many had multiple roles in the musical world (Figure 7).

Figure 6. Music library users – years using music libraries.

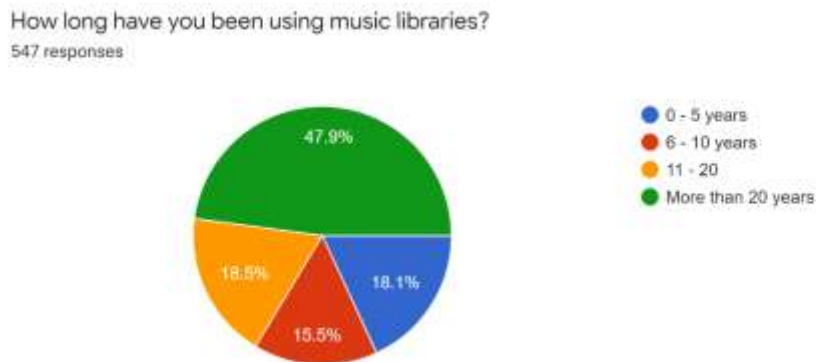
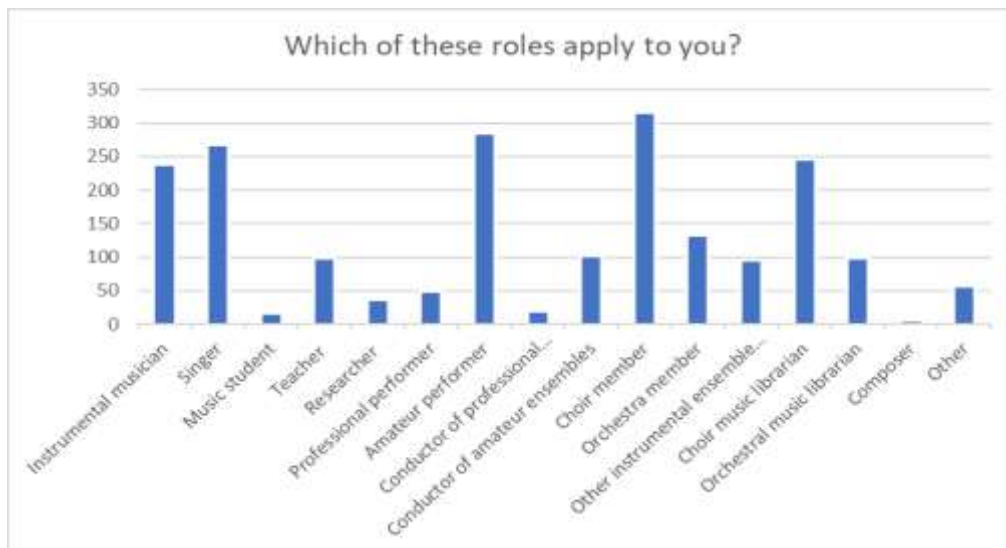


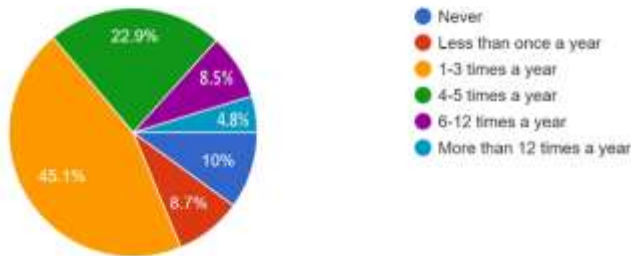
Figure 7. Music library users – roles.



Ninety-five percent of the survey respondents regularly use public music libraries, with varying degrees of frequency. Over a third of those surveyed reported using public libraries for music at least four times a year, while eight percent reported using libraries 6-12 times a year and almost 5% used them more than 12 times a year (Figure 8).

Figure 8. Music library users – frequency of using public libraries.

Approximately how many times a year do you use your local public library for music?
550 responses

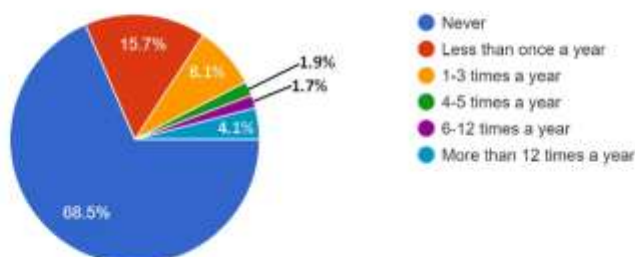


Although 53% also mentioned using publisher hire libraries, only 7% used them more than four times a year, and the qualitative data indicated that these are used mainly when other libraries cannot provide the necessary scores. This is largely due to the expenses associated with publisher hire, and the public library was usually reported as being the first port of call.

Whilst 33% of respondents reported that they accessed music libraries in Higher Education Institutions, half of those users accessed HEI library services less than once a year (Figure 9) and very few comments were made about these services

Figure 9. Music library users – frequency of using HEI libraries.

Approximately how many times a year do you use a local University or Conservatoire music library?
540 responses



As previously noted, 95% of the research participants reported using music services in public libraries, and contextual information from the survey indicated that their responses reflected their experiences in this setting. Therefore, unless users provided specific comments about other sources of music, the following findings are related to their experience of accessing music in public libraries.

4. Main Findings

Where the findings of both surveys directly relate to each other, they are reported together for ease of comparison. Where the findings relate mainly to one of the surveys, they are reported separately. All italicized quotations in this report are taken from participants' comments within the survey.

4.1 Use of music libraries compared with other sources

Library users reported a variety of ways of accessing sheet music, including local libraries, university or conservatoire libraries, music shops, online sources, and digital platforms (such as CPDL) for copyright free music. While 95% of users regularly access public libraries, 25% also use university or conservatoire libraries and 69% use online music shops, so it is clear that most survey respondents are using several different sources. The main factors in deciding which source to use were cost and availability of repertoire.

Online music shops were particularly popular with many users due to the speed of service and the range of music available, compared with relatively limited music stocks in many local public libraries. However, current library services were still widely used and greatly valued by the majority of those surveyed. The benefits of using public libraries included cost-effectiveness, availability of multiple copies for ensembles, and helpful library staff. Users also reported that continued access to a physical library is a priority for 'browsing', evaluating the suitability and condition of printed music, and providing a cost-effective supply of resources:

They are essential to amateur and professional music making and provide a valuable facility which enriches the musical life of this country.

Library closures and reductions in service were a common theme throughout the survey. Unease about the future of music libraries, and concerns about continued 'erosion' of resources and services, were frequently expressed:

Our music library is no more. Do not allow this to happen to the many music libraries that we use.

When asked about priorities, improvements and suggestions for future development, the most common concern was the continuation of music library services:

That they are supported by their local Council or University and that they thrive. They are essential to amateur and professional music making and provide a valuable facility which enriches the musical life of this country.

4.2 Staff training, knowledge, and expertise

Amongst music library users, customer service was generally rated highly, with 221 participants providing positive comments, including almost 40% using the words 'excellent', 'brilliant', 'great', 'good' or 'helpful'.

However, almost 87% of users highly prioritized the availability of staff with musical knowledge, but this was reported as lacking in some cases. Where specialist music librarians were available, they were greatly appreciated, but were sometimes part time or not replaced upon leaving the service.

Despite reports of unqualified staff being very helpful, lack of musical expertise was seen as having an impact upon the service provided.

The need for 'better staff training in music' in order to 'better understand the needs of the musician user' was a common theme:

The staff need to be good librarians as well as having musical understanding, to keep track of orchestral and vocal sets, and unruly choirs who return copies late.

For 58% of the music library staff, specialist music library training had been 'helpful', enabling 'a greater understanding of the resources and how to manage them'. Those who hadn't received any formal training expressed a wish for some provision of library training beyond 'learning on the job'.

Almost 70% of music library staff reported having some experience or training as a musician and reported that their musical background had been 'enormously beneficial' and 'crucial':

It's vital - I don't know if it would be possible to do my job without a strong musical knowledge and being able to read sheet music.

Those with limited musical knowledge or 'understanding of the materials', felt that this 'presents a barrier' and 'affects my confidence', and stated a desire for musical training to help with them to 'speak the same language' as the music library users:

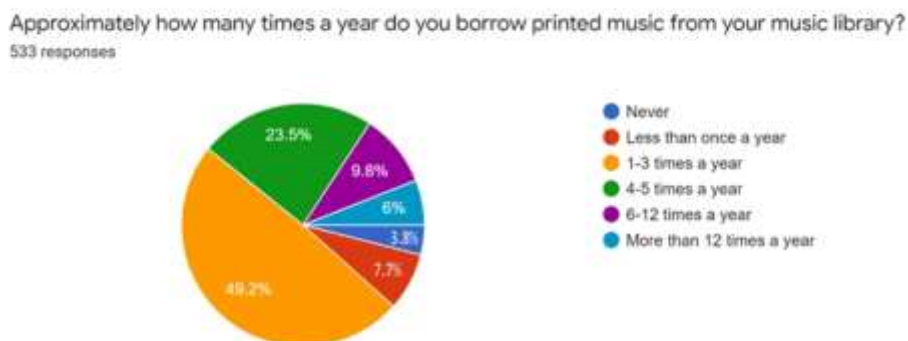
Training to assist with the further understanding of musical terminology and theory, at least at a basic enough level to help solve more complex enquiries. There was a IAML post about "Music for the Terrified" recently - something like this would be a great help.

Other training requirements briefly mentioned by some staff members included cataloguing, using technology to enhance services, and repairing damaged printed music stock.

4.3 Printed resources

More than 88% of the survey respondents reported using libraries to access printed music, with almost 40% doing so more than three times a year, and almost 10% more than 12 times a year (Figure 10).

Figure 10. Music library users – frequency of borrowing printed music.



4.4 Condition of printed stock

The popularity of printed music amongst users is reflected in the condition of some of the stock, which received negative comments from 27% of users. Problems included copies that are ‘damaged’, ‘fragile’ or ‘flimsy’; ‘old and in very poor condition’; ‘difficult to read’ due to ‘blurred’, ‘faded’ or ‘small’ print; and ‘heavily marked by previous users’. This theme continued in the responses to questions about priorities and future suggestions:

Cleanliness and state of repair of scores should be reviewed more often. It rankles paying for bad quality.

4.5 Choice of printed music

The availability of a wide range of printed repertoire via the library was highly prioritized by 86% of users, and 75% highly prioritized access to large instrumental and vocal sets.

Users suggested expanding the availability of contemporary music, classical music, musical theatre scores, more music for small ensembles, music for large ensembles (with an increased number of copies in each set), choral music, ‘easy repertoire’ for choirs; in fact, ‘a fair distribution of funds across various genres of music’.

It was also suggested that ‘libraries need to match stock held and the demand from users better’. In view of the wide spectrum of customer demands (not all compatible with each other and subject to funding), consultation with service users is to be highly recommended.

4.6 Printed music versus digital versions

More than 87% of library users reported preferring printed music to digital versions, and the same number believed that printed copies will be retained in libraries in the future. Fifty percent of users explicitly stated that they want libraries to continue to store, re-condition and expand stock where necessary, and to supply printed copies for the foreseeable future. Only 10% of the users suggested storing printed music in a national repository or in regional centres, and allowing library users to access it all through an integrated, online booking system.

Continued access to printed music was important to users, particularly for larger amateur ensembles. There are concerns about successfully adapting to digitization; lack of equal access to technology; the reliability of internet connection; and limited battery life of electronic devices:

I would hope that [printed sheet music] could be preserved for a long time and at least until there is a clear reliable alternative. I cannot see how downloaded digital music can possibly replace the printed copy for choirs and orchestras until everyone can have access to reliable internet connection and devices in rehearsal and performance venues.

Some users recognised that it is possible to print off downloaded music, but pointed out that printing is not cheap, and that it would be prohibitive with longer works.

4.7 Digital resources

Eighty five percent of users reported that they had never downloaded digital copies of sheet music at a music library, although many mentioned that they use CPDL or IMSLP at home. No other use of digital resources was mentioned by music library users.

Music library staff, however, reported that digitized resources of music are increasingly becoming available. Staff also mentioned a number of online sources, including Alexander Street Press, Classical Music Scores, IMSLP, BabelScores, Nkoda, as well as their own digitized resources. See Table 1 for staff reports of digital and physical stock in music libraries.

Table 1.

Type of resource	Staff reporting that digital versions are available in library	Staff reporting that printed copies are available in library
Solo sheet music	42%	80%
Vocal scores	31%	42%
Full scores	39%	91%
Vocal sets	8%	82%
Orchestral sets	15%	91%
Chamber music	23%	38%
Brass/wind band sets	12%	73%
Miniature scores	23%	82%
Music dictionaries	42%	76%
Books about music	50%	82%
Magazine articles	73%	60%

Although music library staff reported that many digitized resources were available, a lack of information about such resources was a recurring theme throughout the users' survey. This appeared to limit the use of these resources, even where an interest was expressed by users:

Am not aware of any digitization affecting such services. Electronic versions of out of print scores where existing printed material has deteriorated so much as to be unusable would be particularly useful. It would save shelf space for the modern editions which Musical Directors seem to favour and make available more money for replacement stock.

Thirty service users added positive comments about digitized sheet music, including immediate accessibility; increased availability; clean copies; and reduced need for physical storage space. Thirty users also commented negatively about limited digitized repertoire, and the need for access to technology and equipment. Improved communication about the availability and use of technology may gradually improve the perception of, and willingness to use, digitized versions as more become available.

4.8 Finding music

When searching for music, over 70% of users reported consulting the library's online catalogue. However, 65% also reported using email; 35% reported telephoning the library directly; and visiting the library was popular with 32%. This is partly because some people expressed a preference for personal contact rather than relying upon technology. Many respondents reported that they need help with using the online system, because 'it's pretty difficult to get it to work', or 'hard to navigate':

Sometimes the catalogue is a little idiosyncratic (obviously typed in by a non-musician) and so searches have to be inventive.

There were also many perceived limitations of online catalogues. These included limited search options; out of date or incomplete information; and a general lack of trust in its accuracy:

The quality of the data is often poor, with limited information or badly listed titles. The database is not specialist so can confuse editor and composer etc.

Users expressed a wish for an online catalogue that provides more details, such as the number of copies in a set; the contents of songbooks and other music anthologies; information about the available edition (one user suggested that including a photograph would be helpful); the key of the music; the format and scoring:

The catalogue information is often rudimentary; sometimes not even the publisher is listed, information about editor and year are mostly missing. It is therefore often not clear which edition is held by the library.

The data from music library staff was consistent with the users' comments, as 98% of the staff reported that their online catalogue was incomplete and/or inaccurate, and not easy to use. It was felt that 'retroconversion' and improving 'discoverability' needed more attention:

Items are only searchable if the customer knows what they are looking for. A wider search criteria would be nice, but difficult to implement.

This is partly due to the limitations of current cataloguing systems:

The library management systems are not really set up for the correct cataloguing of specialist music resources. Therefore there's always a compromise to be made with local cataloguing rules.

These problems were partly attributed to lack of time; low staffing levels; funding restrictions; and differences between the priorities of music library staff and general library management. In some cases, it was felt that 'the music library has not been previously prioritised in our library':

I'm constantly having to defend the way in which music resources are used and differ from books and journals and that can be very tiring and put you at odds with the senior management of the library service.

4.9 Interlibrary loans (ILLs)

The highest use of ILLs by library users was for obtaining vocal and orchestral sets, vocal scores, and full scores, and some users reported obtaining several different types of printed music via ILL. Table 2 shows the percentage of survey respondents who use ILLs to access specific printed resources and compares this usage with the availability of the service.

Table 2.

Type of resource	Users reporting using ILLs	Staff reporting that ILLs are available
Solo sheet music	7%	50%
Vocal scores	39%	70%
Full scores	29%	72%
Vocal sets	51%	86%
Orchestral sets	51%	86%
Chamber music	7%	53%
Brass/wind band sets	3%	64%
Miniature scores	4%	61%
Recorded music	2%	8%
Books about music	7%	61%
Magazine articles	73%	42%

The discrepancy between the ILL availability reported by music library staff, and the comparatively low usage of ILLs for obtaining resources may suggest a lack of communication to the users about available services. A possible alternative is that the figures may suggest a low level of demand for ILL services, but the qualitative data indicate that this service is valued.

Six percent of users did not use ILLs because the service had been withdrawn from their local library, and the need to 'bring back ILL' featured strongly in the participants' suggestions. The loss of ILLs in some areas is regretted by those who have previously had access to the service:

We (a choir) used to access almost all our music through our local public library who would use interlibrary loan and it was free at point of use. Now this has all been dismantled we get our music from wherever we can [...] This has increased our costs as the rental and postal charges [...] creep up.

The costs, efficiency, lead times for orders, and length of loans, were commonly described by music staff and service users as 'greatly variable' depending upon location. Twelve percent of users added negative comments, which mainly focused on the lack of a fully comprehensive and integrated ILL service:

County Libraries don't always lend to all County Libraries which makes accessing material difficult and/or expensive.

However, 15% of users made positive comments about efficiency and cost-effectiveness of ILLs, and the importance of maintaining this service was repeatedly emphasized:

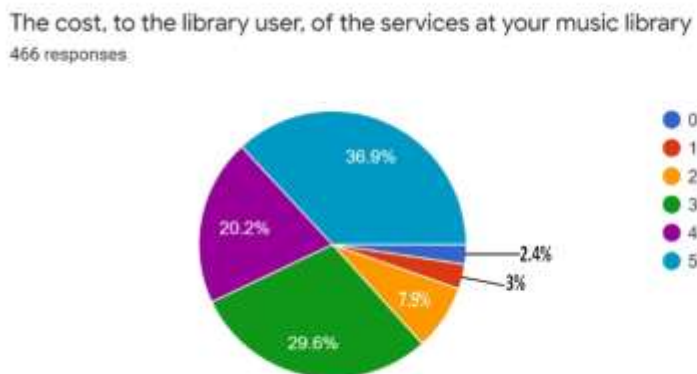
Essential, invaluable, needs to be kept going. Unfortunately we are aware that some local authority libraries have stopped participating in this system.

4.10 Costs and Funding

The cost of library services was one of the priorities for many users (see Figure 11, in which 0 is low and 5 is high) with 38% of participants commenting that they use libraries for music because the service is 'very inexpensive':

Our preferred source is the public library because it is cheapest.

Figure 11. Music library users – rating of importance of cost of service (0 = low and 5 = high)



Whilst expressing appreciation regarding the cost-effectiveness of library services for the borrower, some participants also acknowledged that the current service could be difficult to sustain financially:

Have always experienced an excellent service despite them operating under quite trying local government financial pressures as to staffing and music replacement.

This situation was also reflected in comments by music library staff, who repeatedly highlighted the need for funding to improve services and increase resources:

In the public library system, specialist provision like music collections has been disproportionately disadvantaged by the huge cuts to the public library service.

Music library staff noted that 'funding varies greatly between local councils', and suggested that a more cohesive financial approach might be beneficial. At the same time, some users indicated serious concerns that music library services may be at risk due to funding restrictions, and suggested that pre-emptive action should be taken at national level:

The government needs to be lobbied about protecting funding for libraries and performing arts.

4.11 Co-ordination of services

Library users and staff reported variations in services, funding, costs and resources across different regions. This lack of a cohesive national approach clearly limits the efficiency and usefulness of the ILL service:

The communication between libraries seems poor, some areas won't lend beyond their boundaries. It has got worse in last few years.

Users see the lack of a national music database for libraries as a factor in limited online searchability and difficulties in physically locating resources:

All this would be helped considerably if there was a comprehensive database for music hire that could be used by music libraries throughout the country.

Music staff also stated that 'a unified system for sharing accurate and consistent information on performance sets, and ideally real-time availability is highly desirable for the UK.' Working towards a comprehensive, unified national library service was therefore viewed as a priority for improving communication and efficiency, as evidenced by this user:

Co-operation between music libraries is important both for the borrower (music not available locally, or not in sufficient numbers for the needs of the choir), and for the libraries (additional use of materials and additional income).

4.12 Information

The surveys suggest that a lack of information about services (online and onsite); use of technology; interlibrary loans; access to downloadable music; available repertoire; and other resources is very likely to be having an impact on customer use of library facilities. This is also suggested by the following disparities between the availability of music library services and user knowledge of them:

- Whilst 98% of staff reported that they had an online music catalogue, approximately 25% of the users said they did not know whether their library had one.
- More than 70% of staff reported that online reservations are possible for solo sheet music, full scores, vocal scores and chamber music, and 40% provided an online reservation service for instrumental and vocal sets. However, 32% of users did not know whether there is an online reservation system for any music.
- Although 78% of staff reported using Encore21 (with 49% using it daily and 21% using it weekly), 80% of users have never used Encore21 and 38% had never heard of it.

Some of the users felt that music library services were 'manifestly not publicized enough':

I'd like to know about [Encore21]. I'm going to Google it once I've completed this survey!

Increased communication about available resources and services was recommended by users:

My local public library does not publicise the fact you can request sheet music books through their service, but it is possible once you know!

Circulation of information about new stock and services (and how to access and use them) was suggested, either by sending email updates to regular users, or adding details to library web pages. Some users suggested that libraries could advertise their services through outreach projects with educational and community organizations:

They should be fully integrated into their local music community and their staff should be involved in internal/external organisations (eg. hubs, arts organisations, central/regional/local government task forces).

This suggestion was echoed by some of the music library staff who advocated improving access through increased communication, publicity and outreach:

Schedule more events/seminars/drop in sessions for those working in public libraries to illustrate the many facets a music library can have and allow everyone access to the services on offer, especially when music itself can be a little daunting for some.

5. Summary of Findings

- Public music libraries make an important contribution to musical life, particularly for amateur music makers
- There is concern amongst users about closures and reductions in library services
- Customer service is generally rated highly
- Users and staff identified a need for wider staff training in musical knowledge
- Printed stock is often seen as poorly maintained
- Available repertoire was sometimes seen as limited
- Most library users prefer printed music to digital versions
- Some users have limited knowledge about the availability and use of digitized music
- Online catalogues are not available in every library
- Online catalogues need updating and expanding to include more detailed, accurate information
- Online search facilities are sometimes perceived as limited or difficult to use
- Some users have limited knowledge of the ILL system and online catalogues
- The lack of a comprehensive national database of music resources has an adverse impact on service provision
- An inconsistent, area-based approach to ILLs limits the usefulness of the service
- Limited and inconsistent funding was a concern for users and librarians

6. Summary Recommendations

- Explore options for lobbying and funding for music libraries
- Increase access to appropriate musical training for music library staff
- Survey library users to evaluate their needs regarding printed stock, musical genres and repertoire, number of parts in sets, digital versions of music, and interlibrary loans
- Use survey outcomes to tailor purchasing, stock replenishment and service provision to the needs of the users
- More rigorous monitoring of the condition of printed stock
- Increase provision for repairs and replacements of physical stock
- Update and increase information that is available in online catalogues
- Circulate information about available services and resources, including updates about stock acquisitions
- Provide easily accessible sources of information about how to use the services and access the resources
- Increase technical support for users accessing online services and resources
- Organize outreach events to promote music library services
- Explore ways of integrating services and resources on a national basis

7. Final Comments from the Researcher

The enthusiastic and detailed responses from music library staff and library users indicated that this survey was timely, and well-received. The number of participants, and detail provided in their responses, clearly showed that music library services are highly valued and provide many benefits to the musical community. Some shortcomings were identified by users and staff, and the implications of these have been discussed in this report. It is important to honour the survey respondents' contribution to this research by disseminating the results appropriately and acting on the findings wherever possible.

It should be noted that the surveys were circulated during July and August 2020. Responses to the surveys largely reflect the situation pre-pandemic, and very few participants referred to the effects of the recent global health crisis. This may be due to the time at which the participants completed the surveys, as it appeared at that point that the situation might be improving.

It is also worth noting that, in response to the pandemic, there have been significant changes in public health practice and social behaviour, including limited opportunities for musical groups to meet in person, and an awareness of risk factors such as sharing paper copies. These changes may lead to an increase in the need for digital versions of sheet music, and a reduction in the demand for printed copies. General improvements in online communication, technology provision, and digital equipment may also be accelerated by circumstances arising from the pandemic.

With sufficient investment, libraries may be able to take advantage of these technological developments in the medium to long term. Further training for music librarians in the use of technology, partly to enable them to provide enhanced technical support for library service users, may be one of the routes to improving user access to online services.

As a result of the need to engage more fully in online activity during the 'lockdown', users may be more open to embracing technological developments. With increased experience of using technology, alongside expert support when available, their confidence in online services is likely to increase. As the longer-term situation emerges, the need to share information about resources and services (and how to access and use them), will no doubt continue to be paramount for music library staff and users.

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7th December 2020