

2024 URBAN LIBRARIES COUNCIL LIBRARY INSIGHTS REPORT

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November 2024

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The Urban Libraries Council is an innovation and impact tank of North America's leading public library systems. ULC drives cutting-edge research and strategic partnerships to elevate the power of libraries as essential, transformative institutions. Across the U.S. and Canada, more than 180 member libraries rely on ULC to identify significant challenges facing today's communities and provide new tools and techniques to help libraries achieve stronger outcomes in education, digital equity, workforce and economic development, and race and social equity. Learn more at urbanlibraries.org.

FOREWORD

Public libraries are dynamic, multi-purpose hubs that strengthen community connections, support economic growth and promote digital literacy. Public libraries are not only fostering modern skills and knowledge but also directly engaging with communities at various points of need and social services delivery.

As North America's leading nonprofit and membership organization for urban library professionals, the Urban Libraries Council recognizes the evolving landscape of challenges that urban institutions like public libraries are facing. To better navigate the complexities of the post-pandemic period and understand the transformative role libraries play as a vital community social infrastructure, ULC launched the Library Insights Survey in 2023.

This annual survey of public libraries across the United States and Canada, now in its second year, provides a data-informed look into how libraries have been strengthening their operations and purposefully serving their communities since the pandemic. In the following pages, you can read about emerging trends that capture current patron engagement with library programs, access to services and the building space itself. We also encourage libraries to use these insights to assess standings related to service delivery, program design, staffing and budget in relation to the performance of peers across North America.

Last year's survey results found that public libraries saw digital lending soar between 2019 and 2022, and that in-person visits and programming were on a rebound after reaching record lows during COVID-19 pandemic. I am happy to announce that the trends in this year's report, which covers the calendar year 2023, shows a positive trajectory for public libraries.

As you explore this report, let it serve as a guide and a resource that helps position your library system for present and future success. The path ahead is rich with potential, and together, we stand ready to ensure that our urban libraries remain vibrant spaces of opportunity and inclusivity for all.

BROOKS RAINWATER President and CEO Urban Libraries Council

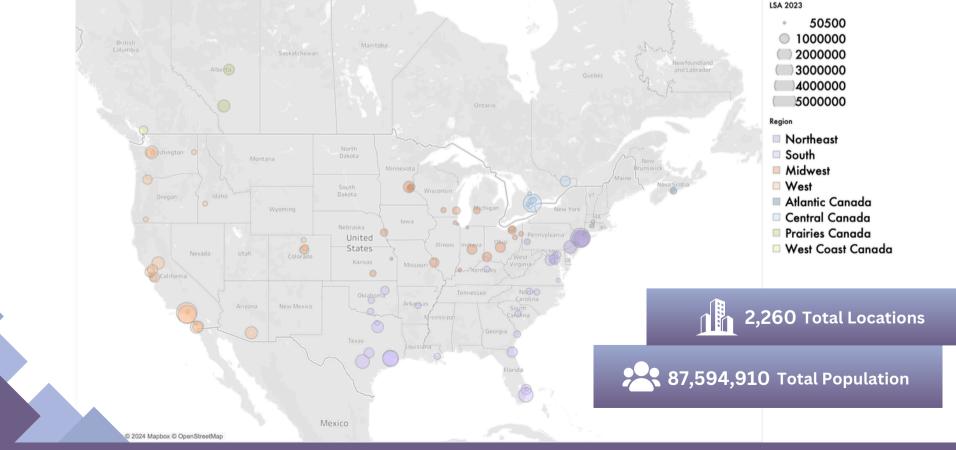


ABOUT THE LIBRARY INSIGHTS SURVEY

In Summer 2024, ULC asked its 185 member libraries across the U.S. and Canada to complete the 2024 Library Insights Survey. The survey collected information from ULC members on their library annual budgets, staffing, operations, visitors and programs to help strengthen and advance the essential role of public libraries in our cities.

A total of 115 library systems responded to the survey and shared data for the calendar year 2023. These libraries operate 2,260 locations and serve a combined population total of over 87.5 million. While every library system is unique in their offerings and community needs, the scale of LIS respondents ensures that the insights drawn from the analysis remains representative of present conditions across the ULC membership.

Figure 1. LIS 2024 - Participating ULC Member Libraries



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INTRODUCTION

Using data collected from Urban Libraries Council members for the 2019, 2022 and 2023 calendar years, this report charts the journey of recovery taken by public libraries since the COVID-19 pandemic. The ULC Library Insights Survey provides a data-driven understanding of the post-pandemic performance of public library systems across the U.S and Canada.

From navigating closed buildings and transitioning to virtual services, to becoming essential public health points of service and evaluating how best to operate upon re-opening, libraries were continuously adapting during the pandemic. The insights drawn from this survey capture emerging trends related to patron engagement with library programs and services while offering guidance that libraries can adopt for the design of current and future improvements.

This report also uses information collected from last year's survey of ULC members, in which respondents provided data for the years 2019 and 2022. The LIS leverages 2019 performance metrics as a benchmark for gauging the present conditions of libraries in 2022 and 2023. Through the exploration of user-trend relationships, this report illuminates the ways library services are being used in concert and provides an in-depth analysis of post-pandemic patron engagement with library services.

User trends are evaluated by calculating percent change between key measures from year to year while identifying points where significant differences are observed. Significant differences between value sets are identified through a Wilcoxon Signed-Rank Test for Paired Samples. Feature relationships are evaluated with correlation and linear regression. Additional information regarding survey instruments, data preparation, and methodologies are available in the appendix and <u>User Guide</u>.

SURVEY CATEGORIES

To better contextualize the library user experience, LIS results are categorized into the following themes:



1. Attraction and Attendance: A synopsis of the library's performance in attracting and retaining in-person visits. This includes an evaluation of pre- and post-pandemic performance metrics.



2. Location Experience and Use of Space: An in-depth analysis of a range of metrics and trends that provide insights into the various ways patrons are engaging with library programs and services. This also includes highlights of major changes in patron interaction with library programs and services.



3. **Library Programs and Services**: An inventory of current library program performance, including a breakdown of pre- and post-pandemic attendance trends.



 Staffing and Budget: A summary of management structures and operation trends across ULC member libraries in North America.

2024 LIBRARY INSIGHTS

Across all industries, uncertainty has been a common state of post-pandemic operations and strategic planning. For people-centric organizations like public libraries, this uncertainty is often focused around how best to plan for the new ways users are engaging with services while remaining true to the institution's primary mission.

While the insights presented in this report are specific to public libraries, they help convey a larger story of post-pandemic recovery for cites. From how people are returning to in-person work and visiting downtown neighborhoods to the reliance on the digital delivery of information and services, public libraries are an echo of cultural and business norms in the post-pandemic era.

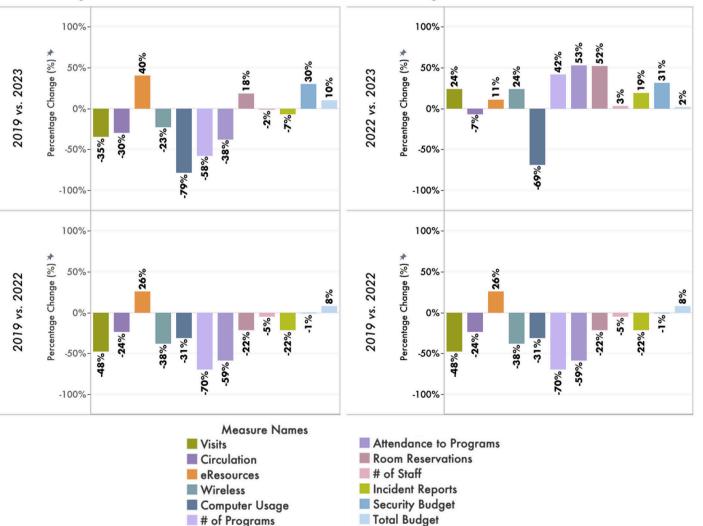
Additionally, the libraries increasingly vital role as "third places"—spaces and locations that are neither home nor work, where people can gather, collaborate, and innovate—is apparent in the survey findings. This is especially visible around the shifts in library programs since the pandemic, and the commitment to keep open doors and a welcoming environment, while balancing challenges such as budgetary battles and rising inequality.

Figure 2 shows the percent change for all variables across all years of the LIS.

Figure 2.

Percent Change from 2019 to 2023 for All Features

Percent Change from 2022 to 2023 for All Features



1. ATTRACTION AND ATTENDANCE

In-person visits to the library remain on the rise, but libraries are still reporting fewer average inperson visits compared to 2019 levels.

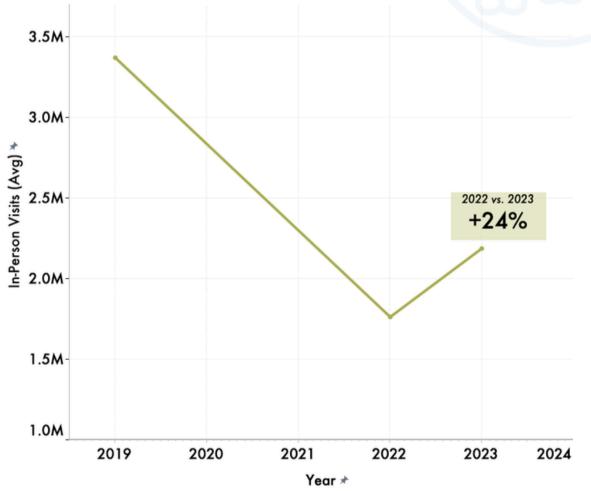
Most service locations, including commercial spaces and public services spaces such as libraries, have struggled to gain back their pre-pandemic attendance levels. While still reporting lower inperson visits compared with 2019, libraries have demonstrated a continued recovery since 2022. This trend highlights a post-pandemic shift in patron behavior across most industries, emphasizing the importance and need to reimagine the design of patron experience.

Libraries surveyed reported 196,799,882 total in-person visits in 2023, a 24% increase since 2022.

While in-person visits are still low when compared to pre-pandemic levels (approximately 35% lower), 2023 marks continued growth of in-person library usage since the pandemic. More of this analysis is explored in the next section about "Location Experience and Use of Space".

Figure 3.

Average In-Person Library Visits: 2019 to 2023



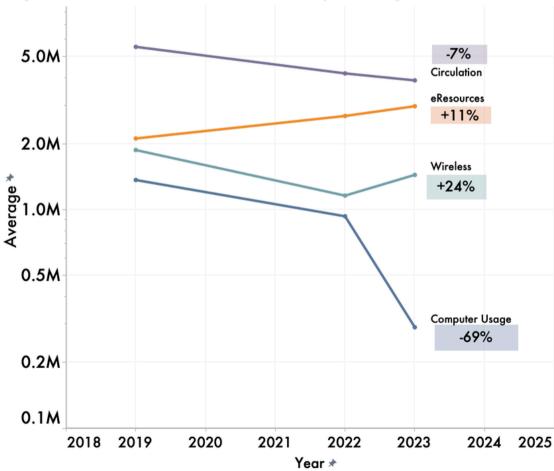
2. LOCATION EXPERIENCE AND USE OF SPACE

Room reservations at public libraries and use of eResources reach new highs.

These eResource usage and physical collection trends mirror that of the library patron's Wi-Fi access and computer usage.

The LIS indicates that computer usage has fallen dramatically since the pandemic, with 2023 levels showing a 69% decline from 2022 and approximately 79% from 2019.

Figure 4.



Avg. Circulation, eResources, Wireless, Computer Usage: 2019 to 2023

Conversely, LIS respondents report an average 24% increase in wireless sessions in 2023 when compared to 2022. This trend line highlights a post-pandemic shift in user behavior across many industries, emphasizing the importance and need to reimagine the design of library patron experiences.

Between 2023 and 2022, the average number of room reservations for all libraries surveyed increased significantly by 52%.

This represents an 18% increase when compared to 2019 levels, despite the overall drop in average inperson visits as noted above.

The accessibility and depth of a public library's digital collection became a critical resource during the pandemic and remains so today. Libraries report an 11% increase in the average number of eResources accessed between 2022 and 2023, which is a 40% percent change since 2019. At the same time, average physical circulation in 2023 was 7% lower than 2022 and 30% lower than 2019, according to LIS respondents.

3. LIBRARY PROGRAMS AND SERVICES

Significant changes observed in how patrons are engaging with library programs and services.

Public libraries have historically adapted to meet the evolving and unique needs of their communities. The pandemic was no exception, as libraries made various operational adjustments, programmatic shifts, and reimagined their functions to address current needs.

Results from the LIS show that although 2023 program totals and program attendance are still lower than pre-pandemic levels (a decrease of 58% and 38%, respectively), libraries have recorded increases in both areas since 2022.

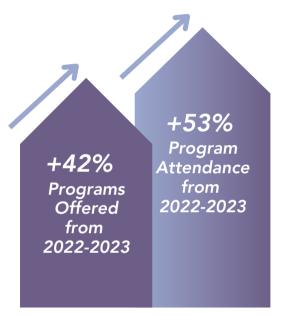
Specifically, in 2023, the average number of programs offered by libraries rose approximately 42%, while the average program attendance rose approximately 53% when compared to 2022.

While these figures are somewhat distant from pre-pandemic levels, they point towards a gradual but steady recovery. The current LIS data also indicates that since the pandemic, libraries have had to adopt a demand-based approach for program design and delivery due to changes in library visits and attendance to library programs.

4. STAFFING AND BUDGET

Average and total FTE library staffing levels are largely at pre-pandemic values, but some outliers remain.

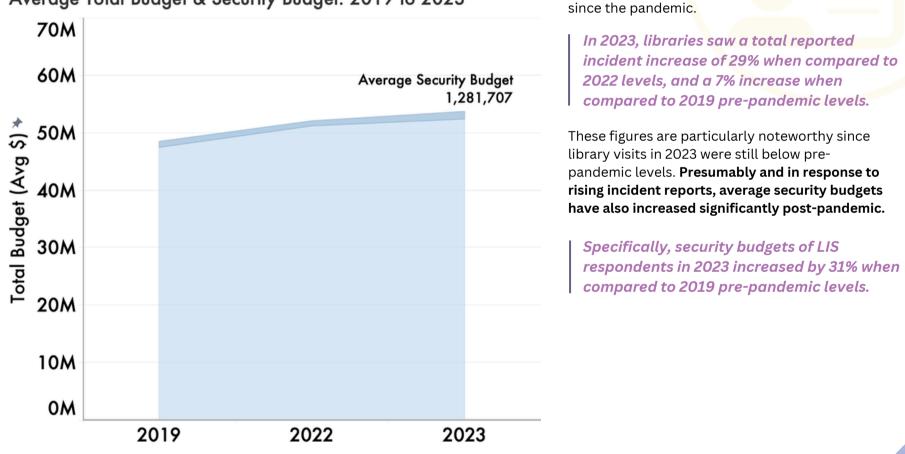
As the use of library spaces, program responsiveness, and patron demand have shifted since the pandemic, adjustments to staffing and budgeting are also required. These adjustments range from capital investments in the construction of new branch locations, investments in bringing back full-time employee positions previously lost due to budget cuts and developing the capacity to meet the challenge of rising operational incident reports with enhancements in safety and security.



Additionally, libraries have been responding to increased levels of incidents in their locations

Regarding staffing, libraries shared a range of full-time employee staffing levels in 2023 compared to before the pandemic in 2019. Some systems recorded 40% fewer FTE staff, while on the other hand some reported a 40% increase. Overall, after a decline in 2022, the recent LIS data shows a slight increase (3%) in FTE staffing levels in 2023, returning the total FTE staffing numbers closer to pre-pandemic levels.

Figure 5.



Average Total Budget & Security Budget: 2019 to 2023

Figure 6.

New Branch Construction Trends: 2023



In recent years, many urban libraries have made a commitment to begin new building construction or branch renovations to meet the evolving needs of their communities and patrons.

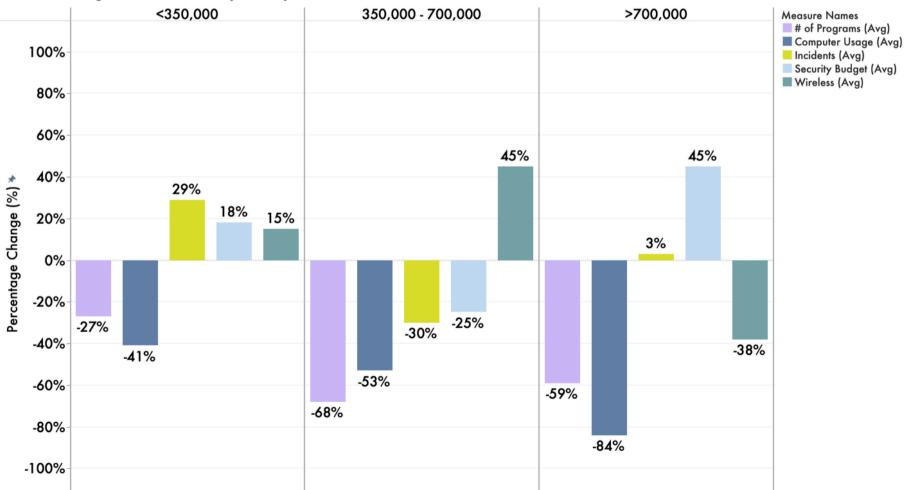
Recognizing the rising costs of these capital improvement projects due to inflation and other associated factors, this year's LIS sought to compile information related to the construction of new branch locations.

For the calendar year 2023, **16% of libraries in the LIS sample started the construction of at least one new branch location** (a total of 25 new branch locations), with construction costs averaging \$695 per square foot for these on-going library branch developments.

USER TRENDS BY POPULATION SIZE

In recognition of the unique community needs and resources available to each library system, the Library Insights survey analysis also examined the performance of libraries according to the size of populations they serve. The following sections analyzes the surveyed libraries based on the populations of their Local Service Areas (LSA) to determine and highlight user trends unique to each grouping. Notable trend differences between library systems of various sizes include user trends related to the total wireless sessions, total available programming, and average number of incident reports.

Figure 7.



Percent Change in User Trends by Library Service Area: 2019 to 2023

USER TRENDS IN LIBRARIES WITH LSA POPULATIONS OF:

< Less than 350,000

Approximately 36% of respondents fall into this category.

Insights drawn from the LIS show that the most notable trend difference between <350K LSA library systems and other systems is in the **volume of incident reports**. In comparison to other library systems, <350K LSA **libraries in the ULC membership saw the greatest increase in average incident reports** compared to 2019 levels. These library systems experienced a 29% increase in average incident reports.



Between 350,000-700,000

Approximately 26% of respondents fall into this category.

For libraries with a LSA population between 350,000 – 700,000, the most notable trend differences are in the number of total library programs, wireless sessions, and decrease in incident reports. According to the LIS, **these libraries demonstrated the highest reduction in total available programming, offering 68% fewer programs by average in 2023 when compared to 2019 levels.** These libraries also saw a 45% increase in average wireless sessions while recording 26% fewer total incident reports in 2023 when compared to 2019 levels.



> Greater than 700,000

Approximately 38% of respondents fall into this category.

Notable trend differences for libraries with >700,000 LSA include **major reductions in computer usage and wireless sessions, as well as increases in security budgets.** While all libraries recorded declines in computer usage levels, the reduction in computer usage in libraries with >700,000 LSA is particularly notable. The current data shows that these libraries in 2023 **recorded an 84% reduction in average computer usage** when compares to 2019 levels. At the same time, these libraries also saw a 38% decrease in average wireless sessions compared to prepandemic levels.

Libraries with >700,000 LSA also saw the **largest average percentage change with security budgets**, moving 45% above 2019 pre-pandemic levels. Likewise, these libraries also recorded a 23% increase in total incident reports from 2022 to 2023.

CONCLUSION

The 2024 Urban Libraries Council Library Insights Report illuminates the evolving landscape of public libraries in the post-pandemic era. Drawing from comprehensive data collected through the Library Insights Survey, this report highlights both the challenges and opportunities that libraries face as they adapt to new community needs and shifting patron behaviors.

Despite the significant reduction of in-person visits—still averaging 35% below pre-pandemic levels libraries have demonstrated resilience and a steady recovery since 2022.

The record improvements in room reservations and eResource usage indicates a transformative shift in how patrons utilize library spaces and services.

With a 40% increase in total room reservations and a 39% rise in total eResources accessed compared to 2019, libraries are increasingly becoming essential third-place workspaces for remote workers and community members seeking flexible environments.

Conversely, declines in physical circulation and computer usage suggest changing preferences, with patrons favoring wireless access over traditional computer stations. The 69% drop in computer usage since 2022 underscores the need for libraries to reimagine their technological offerings to align with current trends.

At the same time, **physical circulation remains very strongly and significantly correlated with all major user trends** including in-person visits, attendance to programs and eResource usage, signaling the continued importance of physical collections.

Staffing levels have **rebounded to near pre-pandemic numbers**, reflecting libraries' commitment to restoring full services. However, the rise in total incident reports—29% higher than in 2022 highlights **emerging challenges in ensuring safe and welcoming environments**, prompting increased investments in security measures. Variations across the size of the population that libraries serve offer unique trends: Libraries with a Local Service Area population of less than 350K face notable increases in incident reports; 350-700K LSA libraries experienced significant reductions in programming; and >700K LSA libraries saw substantial decreases in computer usage and wireless sessions while investing more heavily in security.

These insights underscore the imperative need for libraries to adapt strategically. Embracing innovative service designs, expanding digital resources, and enhancing community engagement are critical steps forward. Libraries must continue to serve as dynamic hubs that not only provide access to information but also foster community resilience, education, and social equity.

As we look ahead, the path is rich with potential. By leveraging the findings of this report, library leaders can make informed decisions that bolster their institutions' impact. The Urban Libraries Council remains dedicated to supporting this journey, driving innovation, and championing the essential role of libraries as transformative community pillars. Together, we can ensure that libraries not only recover but thrive as vibrant spaces of opportunity and inclusivity for all.



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APPENDIX I.

FULL LIST OF 2024 PARTICIPATING LIBRARIES (115 LIBRARIES)

- Alameda County Library
- Alexandria Library
- Allen County Public Library
- Anythink Libraries
- Austin Public Library
- Baltimore County Public Library
- Barrie Public Library
- Boise Public Library
- Brooklyn Public Library
- Broward County Library
- Calgary Public Library
- Camarillo Public Library
- Cambridge Public Library
- Carlsbad City Library
- Carnegie Library of Pittsburgh
- Central Arkansas Library System
- Chattahoochee Valley Libraries
- Cincinnati and Hamilton County Public LIbrary
- Clayton County Library System
- Cleveland Public Library
- Columbus Metropolitan Library
- Contra Costa County Library
- Cuyahoga County Public Library
- Dakota County Library
- Dallas Public Library
- Denver Public Library
- District of Columbia Public Library
- Do Space
- Durham County Library
- East Baton Rouge Parish Library
- Edmonton Public Library
- Elkhart Public Library
- Enoch Pratt Free Library
- Evansville Vanderburgh Public Library
- Fairfax County Public Library
- Ferguson Library
- Fort Vancouver Regional Libraries
- Free Library of Philadelphia
- Frisco Public Library

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• Fulton County Library System

- Grand Rapids Public Library
- Greensboro Public Library
- Halifax Public Libraries
- Hamilton Public Library
- Harris County Public Library
- Hartford Public Library
- Hennepin County Library
- Houston Public Library
- Howard County Library System
- Indianapolis Public Library
- Jackson County Library Services
- Jacksonville Public Library
- Jefferson County Public Library
- Johnson County Public Library (IN)
- Kansas City Public Library
- Kent District Library
- King County Library System
- LA County Library
- La Porte County Public Library
- Las Vegas-Clark County Library District
- Lawrence Public Library
- Lexington Public Library
- Live Oak Public Libraries
- Los Angeles Public Library
- Louisville Free Public Library
- Madison Public Library
- Mandel Public Library of West Palm Beach
- Markham Public Library
- Metropolitan Library System
- Miami-Dade Public Library System
- Milton Public Library
- Milwaukee Public Library
- Multnomah County Library
- New Orleans Public Library
- Newport News Public Library
- Oak Park Public Library
- Oakville Public Library
- Omaha Public Library
- Ottawa Public Library
- Palm Beach County Library System

- Palo Alto City Library
- Pasadena Public Library
- Pima County Public Library
- Pioneer Library System
- Poudre River Public Library District
- Prince George's County Memorial Library System
- Public Library of Youngstown & Mahoning County
- Queens Public Library
- Richland Library
- Richmond Public Library
- Sacramento Public Library
- Saint Paul Public Library
- Salt Lake County Library
- San Antonio Public Library
- San Diego County Library
- San Diego Public Library

San Jose Public Library

Spokane Public Library

• Springfield City Library

St. Louis County Library

• The New York Public Library

• The Seattle Public Library

• Tulsa City County Library

Vancouver Public Library

• Vaughan Public Libraries

• Wichita Public Library

• Toronto Public Library

• Stark Library

County

San Francisco Public Library

San Mateo County Libraries

SarasotaCounty Library System

• Santa Clara County Library District

Schaumburg Township District Library

• The Public Library - Albuquerque & Bernalillo

Topeka and Shawnee County Public Library

APPENDIX II.

SURVEY INSTRUMENT QUESTIONS & RESPONSE OPTIONS BY SURVEY SECTION

Survey Section	Question(s)	Response Option
General Information	 Library Name FSCS Key *if located in the United States Central Library Address *if none, select largest location in LSA Total Number of Locations Respondents Name Respondents Title Email Are you willing to have the information you provide in the bulk data? Did your library participate in the 2023 LIS 	 1-3. [Text] 4. [#] 5-7. [Text] 8. {Y/N] [if NO] 8a. [if NO] Are you able to provide data for the last survey? [Y/N] [if YES] Provide 2019 & 2022 data using the link below: <i>link to 2022 LIS</i>
Attraction & Attendance	 8) Total in-person Library visits in CY2023 9) Registered Users in CY2023 10) LSA population *System-wide Library Service Area Population 	8-10. [#]
Location Experience & Use of Space	 Internet computer usage by general public in CY2023 Total Wireless Sessions in CY2023 Total Physical Circulation in CY2023 *Total physical circulation including renewals Total eResources accessed in CY2023 *All digital materials accessed online (e.g. eBooks, eAudiobooks, databases, eLearning etc.) Average wait time for e-books and audiobooks in CY2023 Total room reservations in Cy2023 *All room reservations (individual or group). Total Incident Reports in CY2023 	11-17 [#]
Library Services & Programs	 18) Total number of library programs in CY2023 *in-person library programs 19) Total Attendance to Library Programs in CY2023 *in-person attendance 20) Select the age group/audience that most of your library programming is designed to reach. 	18-19. [#] 20.a. Pre-school/early literacy, b. School Age, c. Pre-Teens, d. Teens, e. Adults, f. Seniors, g. Other [Text]
Operations, Staffing & Budget	 21) Library's Legal Basis *The legal basis reflects the state of local law which authorizes the library. 22) Total Budget in FY23 *Actual Budget (USD) 23) Total Security Budget in FY23 (USD) 24) FY23 Building maintenance/operations budget *Actual Budget (USD) 25) Total Cost of eResources in FY23 (USD) 26) Did the library utilize the FCC's Emergency Connectivity Fund (ECF) to provide broadband access in FY23? *US members only 27) Total number of library staff in FY2023 *FTE 28) Total number of open positions in FY2023 *FTE positions still vacant at the end of the FY 29) Number of new branch constructions started in 2023 30) New branch construction cost per square foot (USD) *See article 6 of this AIA document for definition of construction costs. 31) Select your library's primary fundraising source 	 21. a. City/County, b. County/Parish, c. Library District, e. Multi-jurisdictional, f. Municipal Government (city, town, or village), g. Non-profit Association or Agency, h. Other [TEXT] 22-30. [#] 31. a. Library Foundation, b. Friends of the Library, friends and Foundation, d. Fundraising professional(s), e. Library Director, f. N/A, g. Other [Text] 31.b (if "Foundation" selected) Library Foundation's Annual Budget [#] Number of Library Foundation FTE [#]

APPENDIX III.

ANALYSIS RESULTS

Table 1: Feature Average, Percent Change & Wilcoxon P-Value by Year

Table 1 contains results from analysis evaluating user trends. This includes averages, percentage change, and Wilcoxon paired signed rank test results, which indicates whether the differences between yearly values are significant (<.05).

Feature	Mean			Percent Change			Wilcoxon p-value*		
(Year)	(2023)	(2022)	(2019)	('23–'22)	('23–'19)	('22–'19)	('23–'22)	('23–'19)	('22–'19)
# of Locations	21.18	21.24	21.16	0.00	0.00	0.00	0.75	0.75	0.60
In-person Visits	2186665.36	1762152.70	3369918.03	0.24	-0.35	-0.48	<.001	<.001	<.001
# of Library Staff	384.39	374.80	392.98	0.03	-0.02	-0.05	0.23	0.97	<.001
Att. Library Programs	176844.18	115505.07	287461.99	0.53	-0.38	-0.60	<.001	<.001	0.01
Computer Usage	290464.58	934810.18	1369760.35	-0.69	-0.79	-0.32	<.001	<.001	<.001
Wireless Sessions	1445847.32	1162090.74	1877576.71	0.24	-0.23	-0.38	<.001	0.72	0.14
Circulation	3910363.20	4208900.29	5567993.34	-0.07	-0.30	-0.24	0.90	<.001	0.00
Room Reservations	18744.10	12310.99	15946.94	0.52	0.18	-0.23	<.001	0.47	<.001
eResources	2979659.16	2688718.65	2121310.48	0.11	0.40	0.27	0.00	<.001	<.001
# of Library Programs	8506.09	5995.90	20248.30	0.42	-0.58	-0.70	<.001	<.001	<.001
Incident Reports	789.79	661.35	853.00	0.19	-0.07	-0.22	<.001	0.68	0.03
Security Budget	1281706.69	974834.06	981620.69	0.31	0.31	-0.01	0.01	<.001	<.001
Budget	52345176.91	51107911.93	47421987.90	0.02	0.10	0.08	0.00	<.001	<.001

Table 2. Correlation & Lasso Regression Results: In-person Visits 2023

Table 2 contains results from correlation tests and multiple regression, which were used to analysis the relationships between features. Mean Average Error (MAE), Mean Squared Error (MSE), Coefficient of Determination (R2) are all measures of model fit. MAE & MSE indicate how different the predicted test values were from the actual values. R2 measures what percentage of the variance within in-person visits is captured by the other variables (87% in this case). Additional information regarding methodologies is available in the user guide.

Feature	Target	Spearman	Kendall Tau	Lasso	MAE Test	MSE Test	R ² Test
		Correlation	Correlation	Coefficients			
# of Locations	In-person Visits	0.836	0.643	0.252	0.240	0.090	0.870
# of Library Staff		0.850	0.666	0.000			
Att. Library Programs		0.785	0.609	0.160			
Computer Usage		0.892	0.728	0.231			
Wireless Sessions		0.608	0.425	0.015			
Circulation		0.904	0.730	0.293			
Room Reservations		0.395	0.278	0.000			
eResources		0.833	0.651	0.047			
# of Library Programs		0.774	0.579	-0.105			
Incident Reports		0.640	0.456	0.025			
Security Budget		0.681	0.486	0.000			
Budget		0.872	0.689	0.038			

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