

Voter Perceptions of Libraries

Getting from Awareness to Funding 2018

Session presenters



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Session agenda

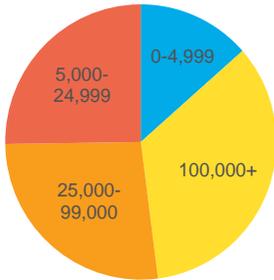
- Key findings and comparison to 2008
 - US voters overall – *Sharon*
 - Sample voter market segments – *Larra*
- Context and reflections – *Vailey and Marci*
- Discussion



How familiar are you with the 2008 *From Awareness to Funding* study?



Who is in the room?



Size of library service population

Key findings and comparison to 2008

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Six drivers of library support.

1. Attitudes toward the library
2. Use of library services
3. Perceptions of library staff
4. Likelihood of voting for library funding
5. General voting behavior
6. Barriers to using or supporting the library

A majority of voters value public libraries.

- An essential local institution: **55%**
- A source of community pride: **53%**
- Advances education: **58%**
- Enhances quality of life: **51%**



But even more did a decade ago.

- An essential local institution: **55% vs. 71%**
- A source of community pride: **53% vs. 73%**
- Advances education: 58%
- Enhances quality of life: 51%



For most voters, libraries remain relevant in the Internet age.

- Internet is equivalent to libraries: **27%**
- Book retailers are easier: **19%**
- Libraries are unnecessary: **13%**
- Internet makes libraries obsolete: **24% vs. 14%**



Two-third of voters rate seven library offerings as very important.

- Quiet areas
- Free access to books, technology
- Convenient to get to
- Free access to computers, Internet
- Broad range of materials
- Convenient hours
- Wi-Fi access



But in 2008, more voters rated more offerings as important.

- Free access to books, technology
- Convenient hours
- Quiet areas
- Free access to computers, Internet
- **Excellent homework help**
- **Right staff to meet community needs**
- **Large facility to meet needs**
- **Offer something for all ages, genders, ethnicities, religions**
- **Support adult literacy**



A majority of voters give high ratings to their local library on most-valued offerings.

- Quiet areas: **60%**
- Free access to books and technology: **61%**
- Convenient to get to: **62%**
- Free access to computers, Internet: **61%**
- Broad range of materials: **58%**
- Convenient hours: **53%**
- Wi-fi access: **60%**



With some change in ratings compared to 2008.

- Quiet areas: **60% vs. 67%**
- Free access to books, technology: **61% vs. 70%**
- Convenient to get to: 62%
- Free access to computers, Internet: **61% vs. 68%**
- Broad range of materials: 58%
- Convenient hours: **53% vs. 57%**
- Wi-fi access: **60% vs. 36%**



More voters today say it's important for library to be a community hub.

- Offers activities and entertainment you can't find anywhere else: **48% vs. 38%**
- Be a place for people to gather and socialize: **45% vs. 36%**
- Support civic discourse and community building: **47%**



And more voters see their local library as a hub today.

- Offers activities and entertainment you can't find anywhere else: **43% vs. 34%**
- A place for people to gather and socialize: **44% vs. 35%**
- Supports civic discourse and community building: **40%**
- A frequent social hub: **30% vs. 18%**



More voters see their library as a resource for job skills, immigrants.

- Helps provide people with skills for the workplace: **42% vs. 35%**
- Provides services for immigrants and non-English speakers: **35% vs. 25%**



But fewer voters today see the library's role in children's lives.

- Excellent for homework help: **51% vs. 71%**
- Excellent preparation for school: **44% vs. 53%**
- Not as important in kids' lives: **36% vs. 24%**



Majority of voters rate these library staff qualities as very important:

- Friendly and approachable: **69%**
- Expert connector to information and resources: **60%**
- Teaches how to find trustworthy information: **57%**
- Makes library a place for fun and creativity: **57%**
- True advocate for lifelong learning: **56%**
- Knows what books children would love: **56%**



But fewer see those qualities as being strong at their local library.

- Friendly and approachable: **53%**
- Expert connector to information and resources: **45%**
- Teaches how to find trustworthy information: **43%**
- Makes library a place for fun and creativity: **46%**
- Lifelong learning advocate: **46%**
- Knows what books children would love: **45%**

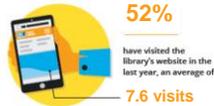


Ratings on some staff qualities have declined since 2008.

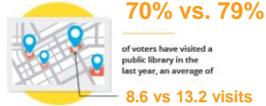
- Friendly, approachable: **53% vs. 67%**
- Lifelong learning advocate: **46% vs. 56%**
- Community knowledge: **42% vs. 54%**
- Knows how to address community needs: **42% vs. 48%**
- Excellent computer skills: **42% vs. 50%**
- Well known in community: **31% vs. 40%**



Voters frequently visit libraries in person and online.



But more did in 2008.



Some common services are now used less often.

- Nonfiction books: **53% vs. 67%**
- Adult fiction, bestsellers: **54% vs. 63%**
- DVDs for adults: **45% vs. 51%**
- Print reference material: **34% vs. 51%**
- Computer searching: **40% vs. 47%**
- Photocopying: **39% vs. 48%**

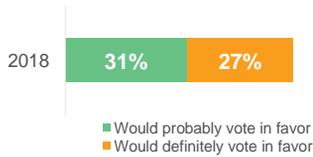


While others services are used more often now.

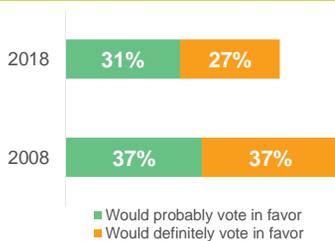
- Community meeting rooms: **37% vs. 27%**
- Non-English books and materials: **30% vs. 21%**
- Home schooling resource: **23% vs. 18%**



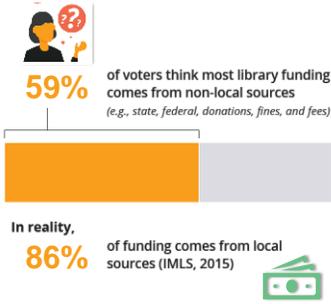
Majority of voters say they would vote in favor of local library funding.



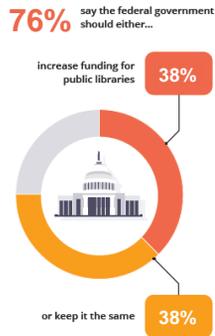
But fewer voters are committed to library support than in 2008.



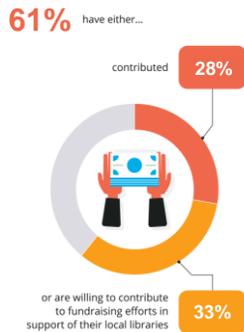
Many voters are confused about the primary source of library funding.



Voters support federal funding for libraries.



A majority of voters are willing to donate money to libraries.



Think about...

How do these national results compare with local attitudes and behavior in your community?

Library Support Segments

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Library Support Segmentation Pyramid

SUPER SUPPORTERS

PROBABLE SUPPORTERS

- Just For Fun
- Kid Driven
- Library As Office
- Look to Librarians
- Greater Good



BARRIERS TO SUPPORT

- Financially Strapped
- Detached
- The Web Wins

CHRONIC NON-VOTERS

Annotation Tools

Find the grey marker pen icon at top left corner of the slide. The tool buttons will open in a row on the left side of your screen, once you [click on the marker](#).

Check mark

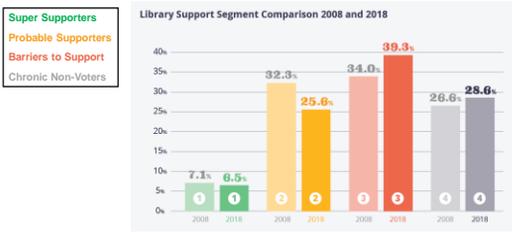
- Click on square, half-way down.
- Use the drop-down menu and choose the check mark.
- Click on slide to indicate choice.



How familiar are you with market segmentation?



Segment comparison 2008 vs. 2018



Super Supporters



Super Supporters

- A source of community pride: **88%**
- Helps people find trustworthy information: **83%**
- Raises property values: **80%**
- Stimulates community growth, development: **77%**
- Community hub: **46% vs. 34%**



Super Supporters

- Internet provides all one could find in the library: **8% vs. 16%**
- Search engines just as good: **10% vs 22%**
- Average **15.9** visits over 1 year
- Willing to pay more in local taxes: **87%**



Super Supporters

% who would vote favorably for library referendum



Probable Supporters



Probable Supporters: Greater Good

- Free access to broad range of knowledge, technology: **76%**
- Offer quiet work areas: **74%**
- Excellent educational resource: **73%**
- Invaluable resource in Internet age: **67%**
- A resource we cannot live without: **60%**
- Place to gain workforce skills: **56%**
- Community gathering place: **55%**
- Resource for small businesses: **53%**



Probable Supporters: Greater Good

- Would definitely vote for library referendum: **44%**
- Would agree to pay more in local taxes toward library funding: **38%**
- Donated to fundraising groups: **40%**



Probable Supporters: Look to Librarians

- Overall high impression of librarians: **76%**
- Overall high ratings of public libraries: **79%**
- Avg. visits in 1 year declined from **24.5 to 13.8**
- Something essential would be lost if library shut down: **73% vs. 92%**
- Committed to definite vote for library funding: **26% vs. 50%**



Probable Supporters: Library as Office

- Avg. visits to the library in 1 year: **26.4 vs. 18.0**
- Avg. website visits in 1 year: **20.7 avg.**
- Committed to definite vote for library funding: **45%**



Probable Supporters: Kid Driven

- Excellent preparing kids for school: **51% vs. 67%**
- Excellent for homework help: **63% vs. 80%**
- Not as important in children's lives: **29% vs. 14%**
- Avg. visits in 1 year: **14.0 vs 18.0 avg.**



Probable Supporters: Kid Driven

- Be community gathering place: **58% vs. 47%**
- Offers activities and entertainment can't find anywhere else: **53% vs. 47%**
- Knowledgeable about community: **48% vs. 69%**
- Work closely with local leaders: **33% vs. 50%**

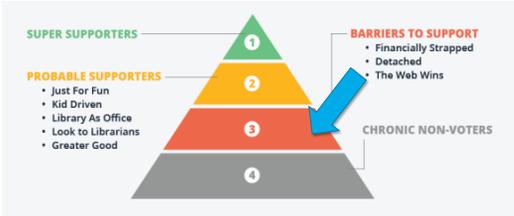


Probable Supporters: Kid Driven

- Definitely vote for library funding: **30% vs 48%**
- Probably vote for library funding: **43% vs. 39%**



Barriers to Support



Barriers to Support: The Web Wins

- Use of non-English books: **42% vs. 34%**
- Job-seeking support: **35% vs. 23%**
- Internet is as good as the library: **50% vs. 63%**
- Invaluable resource in internet age: **28%**
- Probably vote for library funding: **43% vs. 39%**



Think about...

Which voter support segment(s) should you focus on in your community, and why?

Context and Reflections

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What has shifted
over the past
decade?

Game
changers



Photo by Tracy Le Blanc from Pexels <https://www.pexels.com/photo/apple-applications-apps-cell-phone-607812/>

Super Supporters	Greater Good	Look to Librarians
Library as Office	Kid Driven	Just For Fun
The Web Wins	Financially Strapped	Detached

For your community:
Attitudes & Behaviors

How do the national results compare with local attitudes and behavior?

How do national results compare with local attitudes and behavior?

For your community: Impact of Societal Shifts	Technological	Economic
	Demographic	Political

Societal shifts with greatest local impact?

Keep the discussion going...

- Complete the post-webinar survey
- Explore the full research at oc.lc/awareness2018
- Join new Facebook group on this topic: www.facebook.com/groups/FATF2018/
- Tweet links and thoughts: **#awareness2funding**
- Contact us with ideas, requests

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Thank you!