



Voter Perceptions of Libraries

Getting from Awareness to Funding 2018

Session presenters



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Office for Library
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WebJunction,
OCLC Research



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Office for Information
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Association



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Multnomah County
Library (OR)

#awareness2funding

Session agenda

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



oc.lc/awareness2018

From Awareness to Funding

Voter Perceptions and Support of Public Libraries in 2018

ALA American Library Association | **Public Library Association** | **OCLC** | **WebJunction**

From Awareness to Funding

Voter Perceptions and Support of Public Libraries in 2018

A new survey of US voters commissioned by OCLC, the American Library Association, and the Public Library Association of voters offers valuable insights on current voter perceptions on public libraries and how to strategize for the future. Read on for a selection of key survey findings.

Public libraries are essential to communities

- 65% view the public library as an essential local institution
- 68% believe public libraries advance education for any community
- 44% view the library as a gathering place for community members

2 in 3 voters place high importance on foundational library services, including:

- 87% open access
- 86% books and technology
- 85% a broad range of materials to explore
- 85% computers and internet

Voters frequently visit libraries in person and online

- 70% of voters have visited a public library in the last year, an average of 8.6 visits
- 52% have visited the library's website in the last year, an average of 7.6 visits

Majority of voters support local funding for libraries

- 58% would vote favorably for increases at the ballot box
- 27% would definitely vote in favor
- 31% would probably vote in favor

Most voters are confused about library funding sources

- 59% of voters think most library funding comes from federal sources (e.g. state, federal, private, etc. not just)
- In reality, 86% of funding comes from local sources (MIA, 2018)

Voters support other funding options

Most voters support federal funding

- 76% say the federal government should either:
 - increase funding for public libraries 38%
 - or keep it the same 38%

The majority of voters are willing to donate money to libraries

- 61% have either:
 - contributed 25%
 - or are willing to contribute to fundraising efforts in support of their local libraries 33%

Read the full report to learn more!

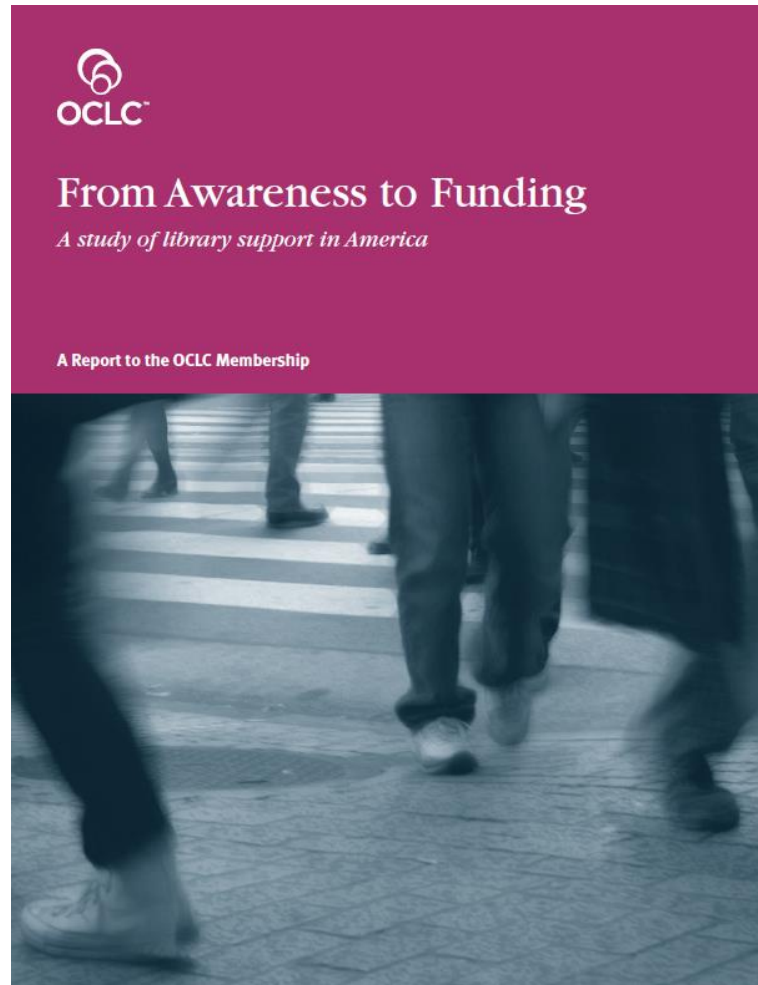
Visit oc.lc/awareness2018

To discover the real-life attitudes, perceptions, and behaviors among different segments of the voting public over the past two years and how that drives their support for libraries today.

ALA | Public Library Association | OCLC | WebJunction

Survey: Data from a survey panel of 2,000 US voters ages 18 and older living in residential households from June 2018, administered by Survey Research Center (SRC) to American Library Association (ALA), Public Library Association (PLA) and OCLC. The survey data represents a cross-section of the population. The report is for informational purposes only. © 2018 OCLC. All rights reserved.

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

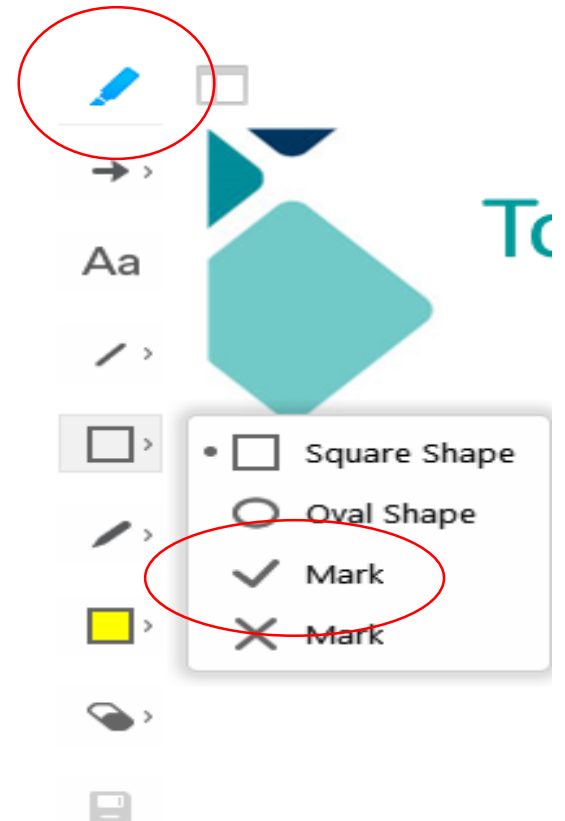


Annotation Tools

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 the 2008 *From Awareness to Funding* study?

Never
heard of it.

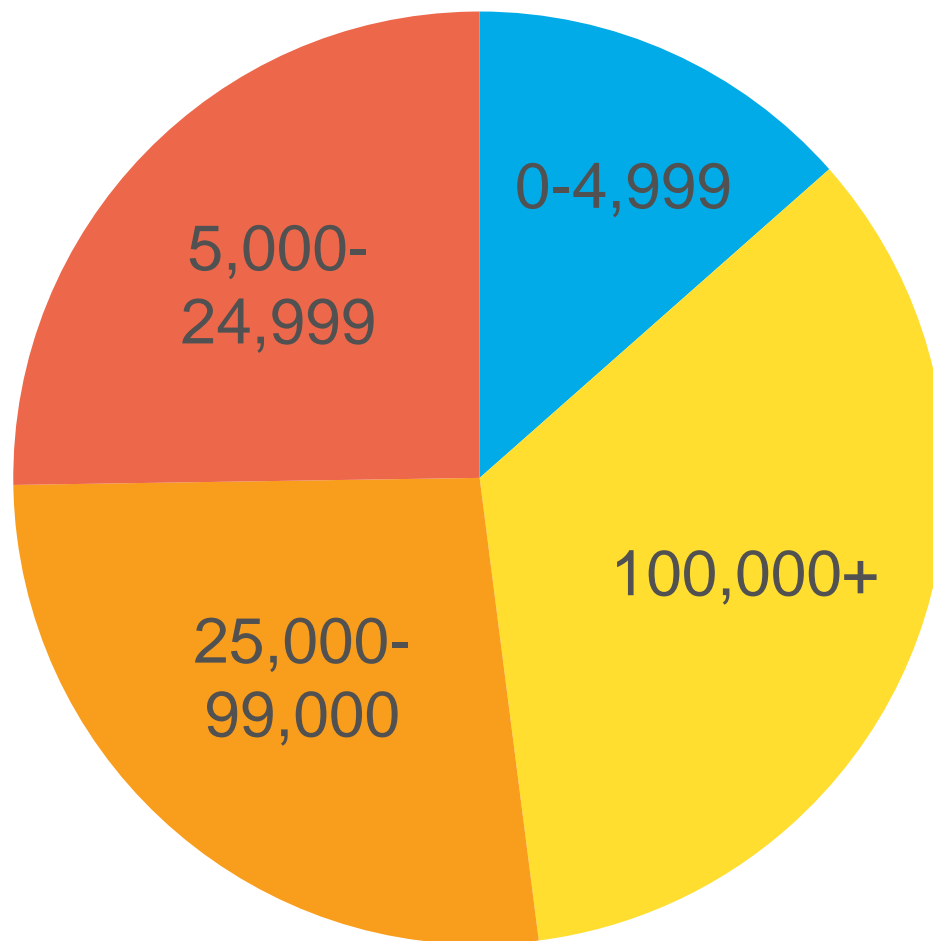
I'm aware
of it.

I'm quite
familiar
with it.

It shaped my
advocacy
strategy.



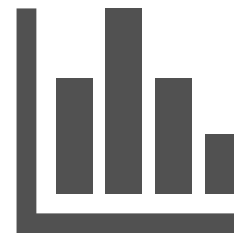
Who is in the room?



Size of library service population

Key findings and comparison to 2008

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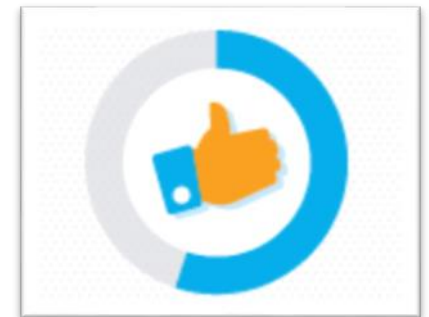


Six drivers of library support.

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

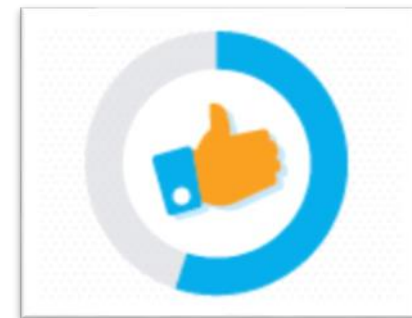
A majority of voters value public libraries.

- 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%**

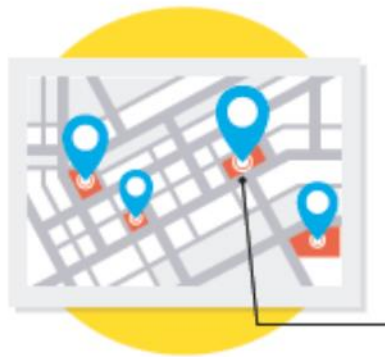


Ratings on some staff qualities have declined since 2008.

- 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.



70%

of voters have visited a public library in the last year, an average of

8.6 visits

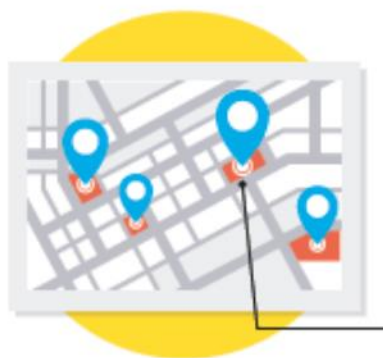


52%

have visited the library's website in the last year, an average of

7.6 visits

But more did in 2008.



70% vs. 79%

of voters have visited a public library in the last year, an average of

8.6 vs 13.2 visits



52% vs. 77%

have visited the library's website in the last year, an average of

7.6 visits

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.

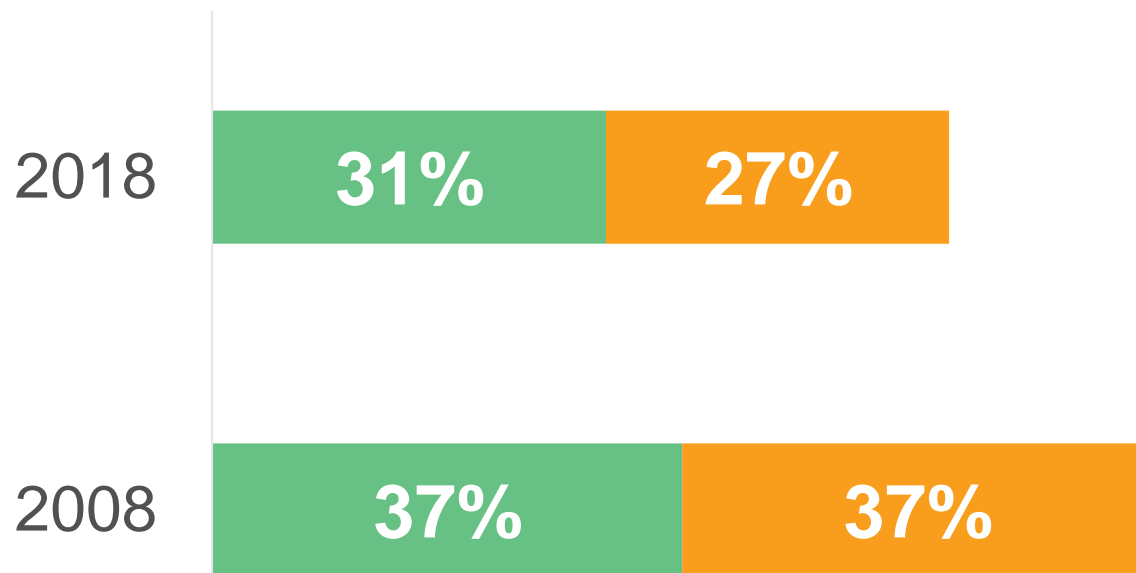
2018



- Would probably vote in favor
- Would definitely vote in favor



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



- Would probably vote in favor
- Would definitely vote in favor



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



59%

of voters think most library funding comes from non-local sources

(e.g., state, federal, donations, fines, and fees)



In reality,

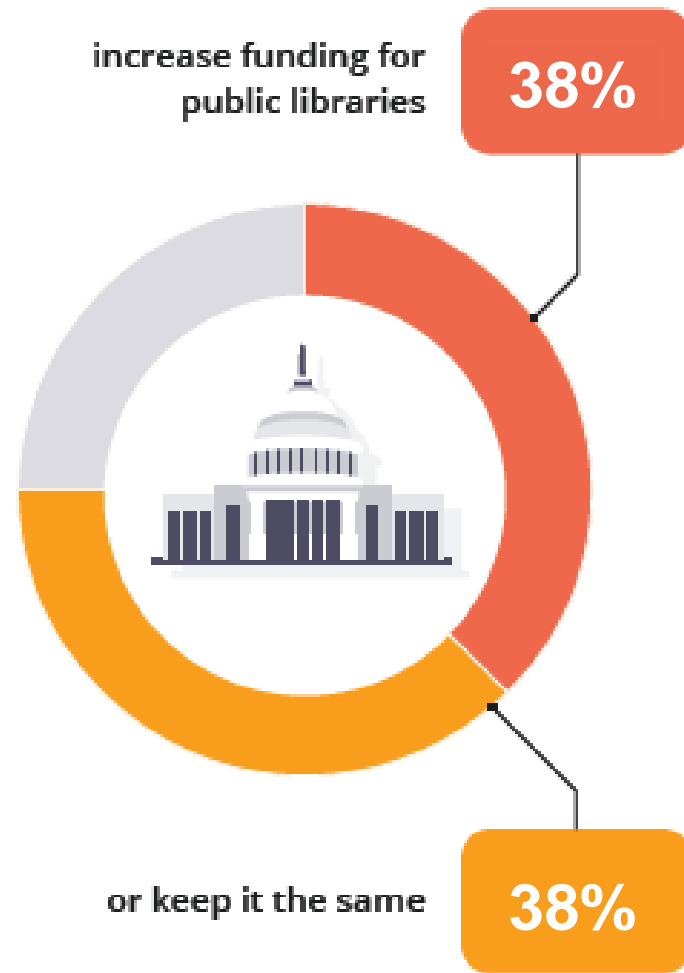
86%

of funding comes from local sources (IMLS, 2015)



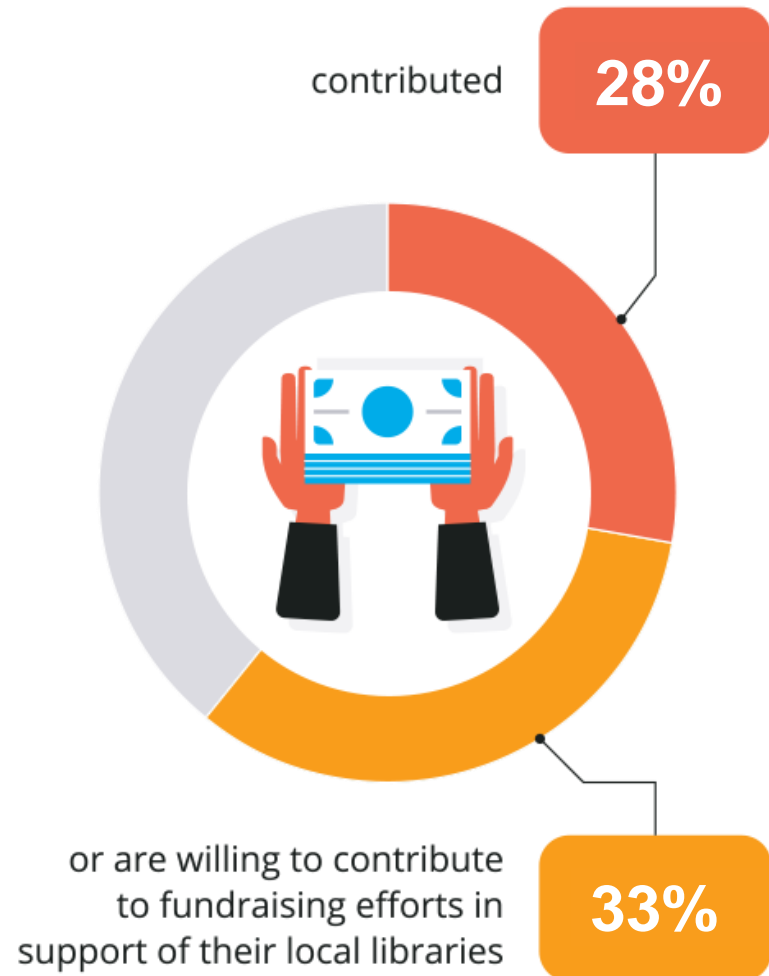
Voters support federal funding for libraries.

76% say the federal government should either...



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

61% have either...

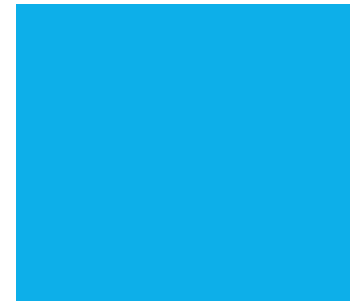
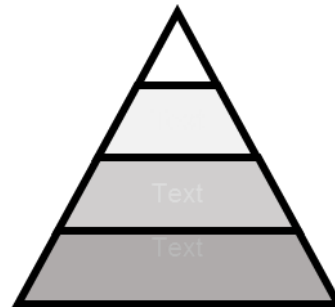


Think about...

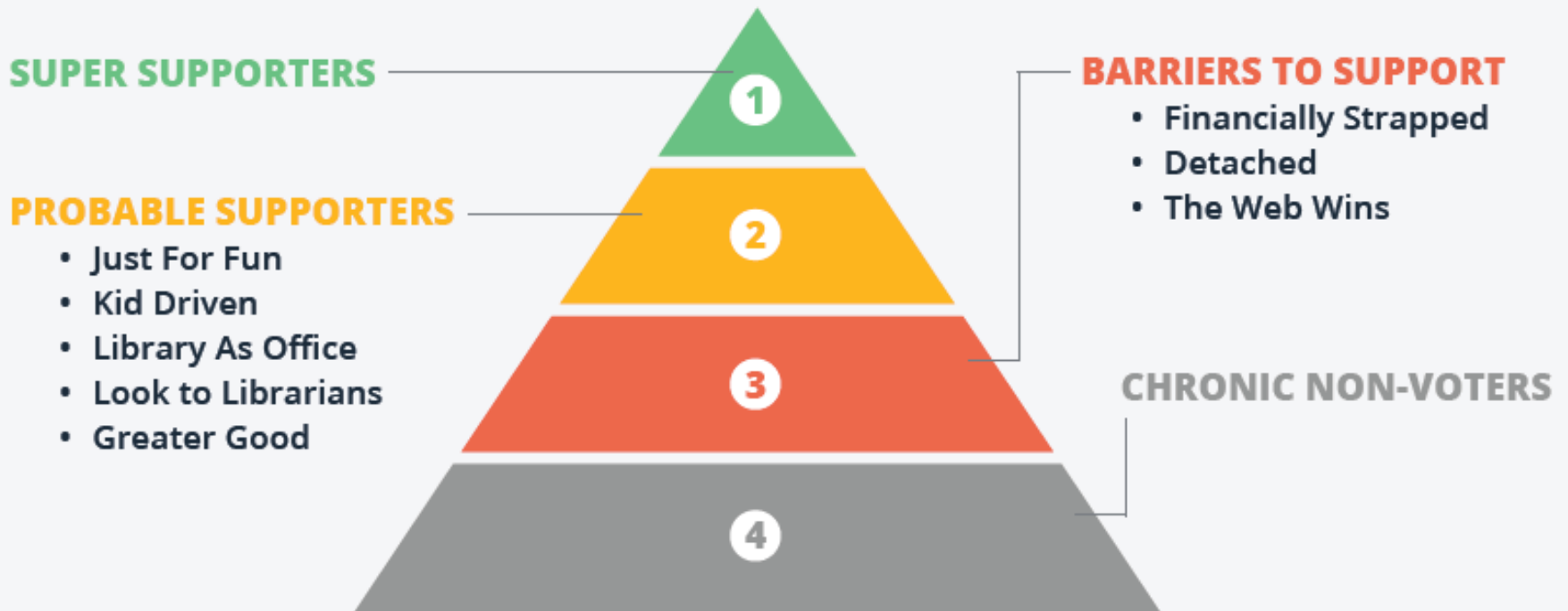
How do these national results compare with local attitudes and behavior in your community?

Library Support Segments

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Library Support Segmentation Pyramid

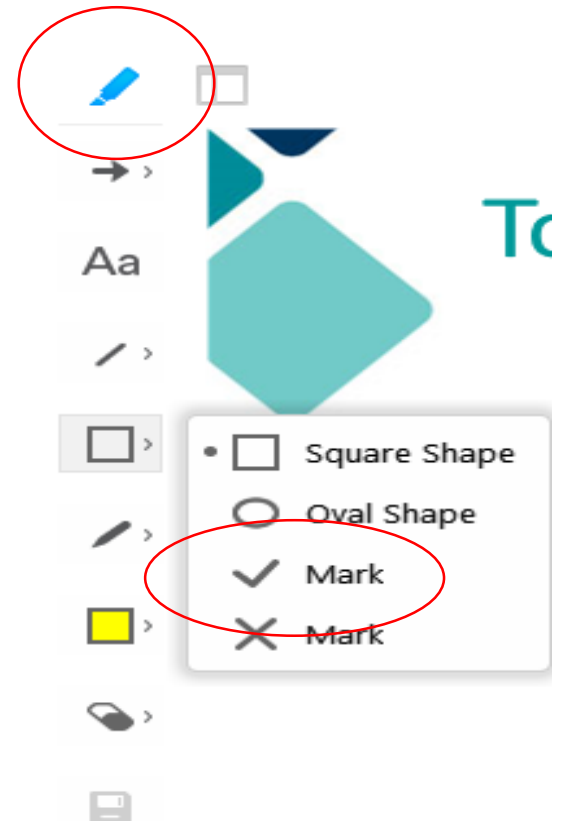


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How familiar are you with market segmentation?

Never heard of it.

Aware of it.

Quite familiar with it.

I use it in my work.



Segment comparison 2008 vs. 2018

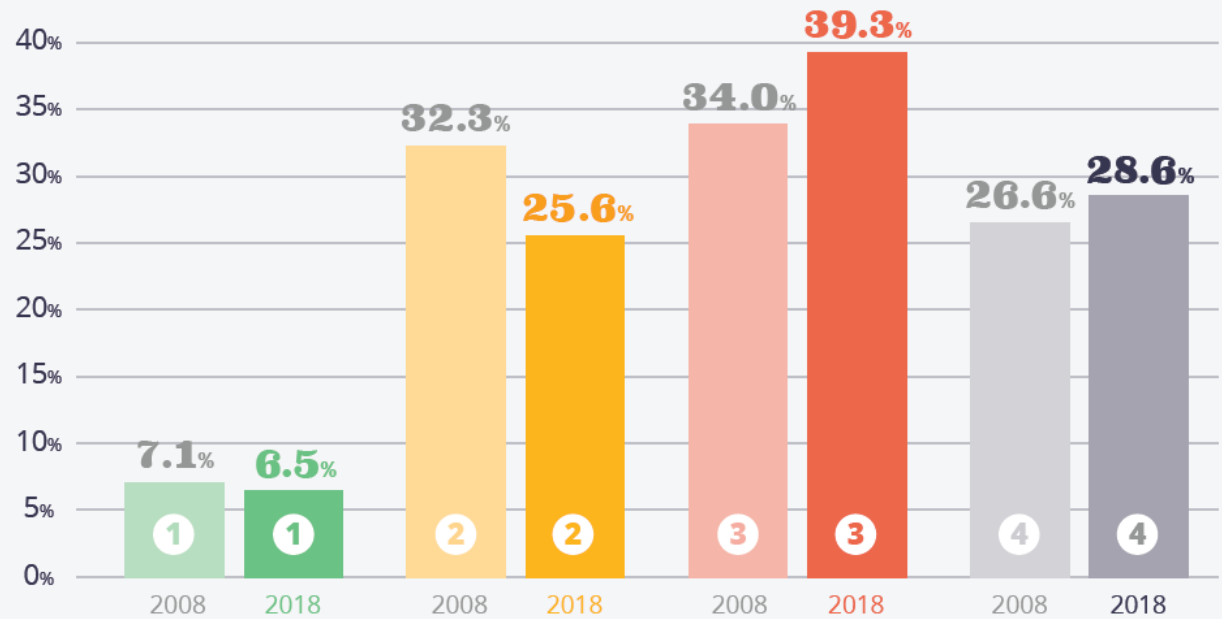
Super Supporters

Probable Supporters

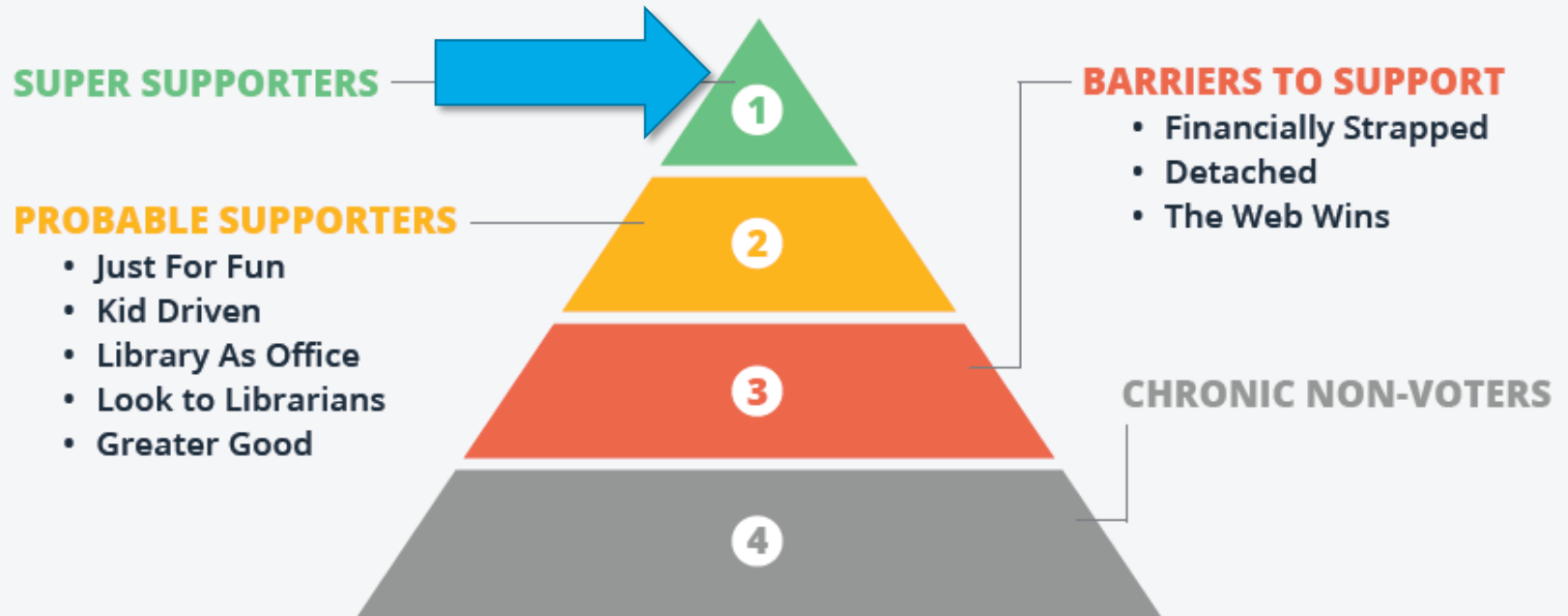
Barriers to Support

Chronic Non-Voters

Library Support Segment Comparison 2008 and 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%**



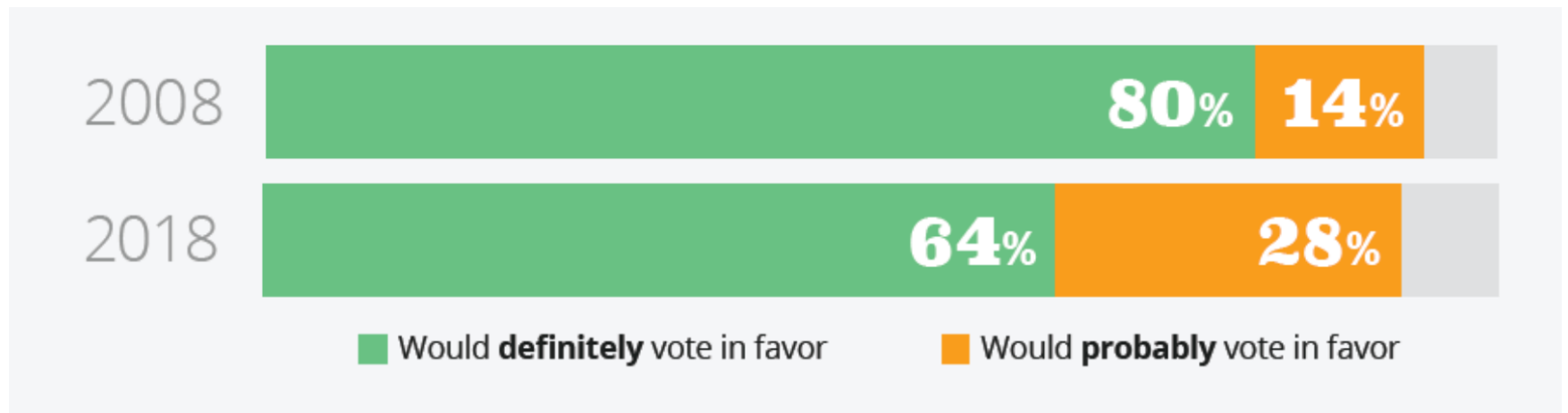
Super Supporters

- 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

SUPER SUPPORTERS

1

PROBABLE SUPPORTERS

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

2

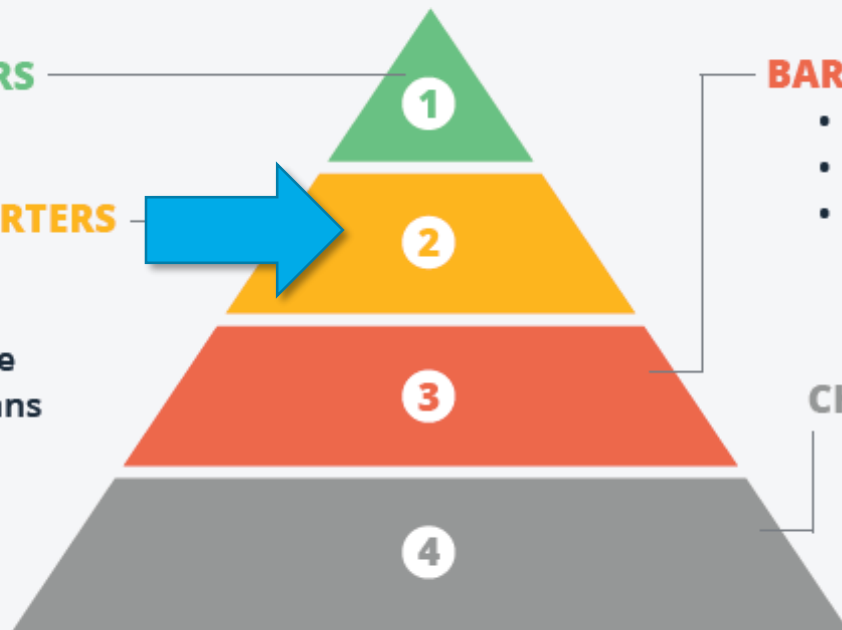
3

4

BARRIERS TO SUPPORT

- Financially Strapped
- Detached
- The Web Wins

CHRONIC NON-VOTERS



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%**



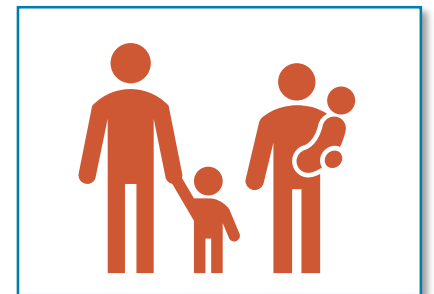
Probable Supporters: Library as Office

- 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

SUPER SUPPORTERS

1

PROBABLE SUPPORTERS

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

2

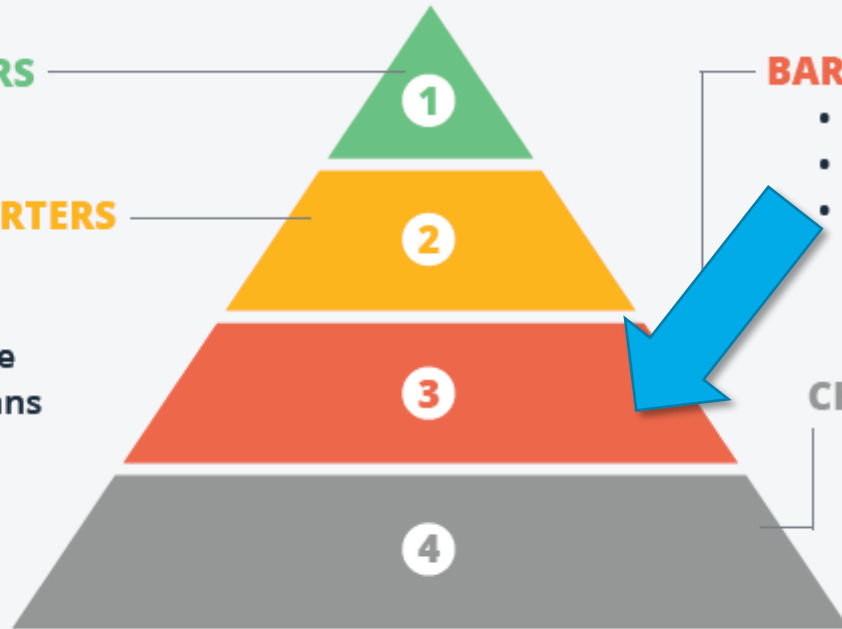
3

4

BARRIERS TO SUPPORT

- Financially Strapped
- Detached
- The Web Wins

CHRONIC NON-VOTERS



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%**

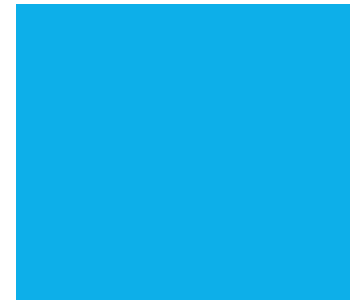


Think about...

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

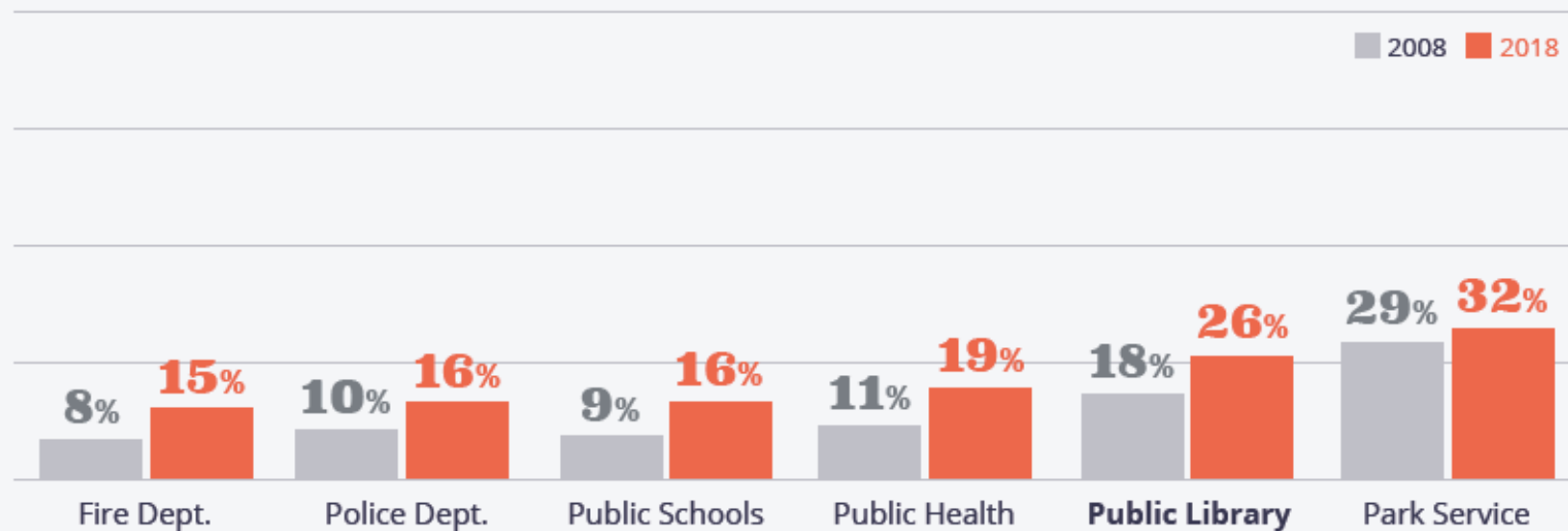


Photo by Tracy Le Blanc from Pexels <https://www.pexels.com/photo/apple-applications-apps-cell-phone-607812/>

Attitudes toward public services funding

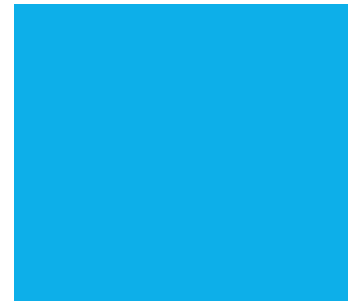
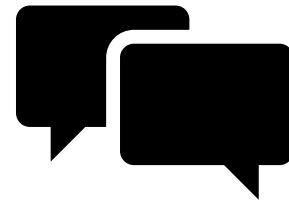
Should be one of the first things cut in a budget crisis

(% Top 3 Box Agreement: 8, 9, or 10 on a 10 pt. scale)



Discussion

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For your
community:

Support
Segments

Which local support
segments should you
focus on, and why?

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

Our contact information

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- Larra: **lclark@ala.org**
- Vailey: **vaileyo@multcolib.org** • @MultCoLib_Dir

Thank you!

