



Wisconsin Public Library: Attitudes, Opinions and Usage

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Background

OBJECTIVE:

The purpose of this research is to help public libraries in Wisconsin understand **who** is currently using the library, **why** they are using the library, and **what** opportunities exist to grow usage across both current and potential users.

METHOD / APPROACH:

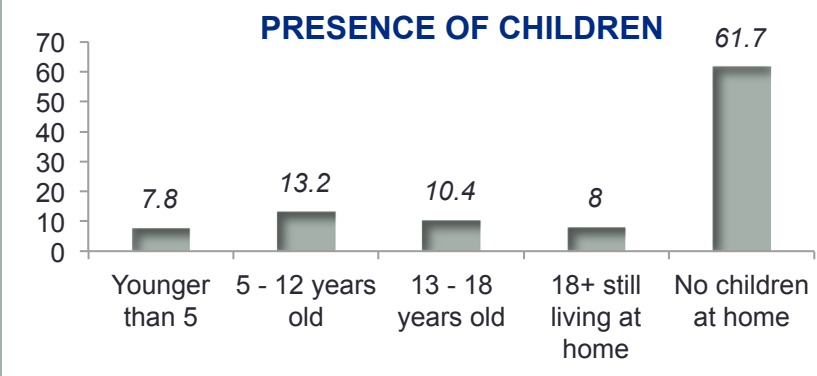
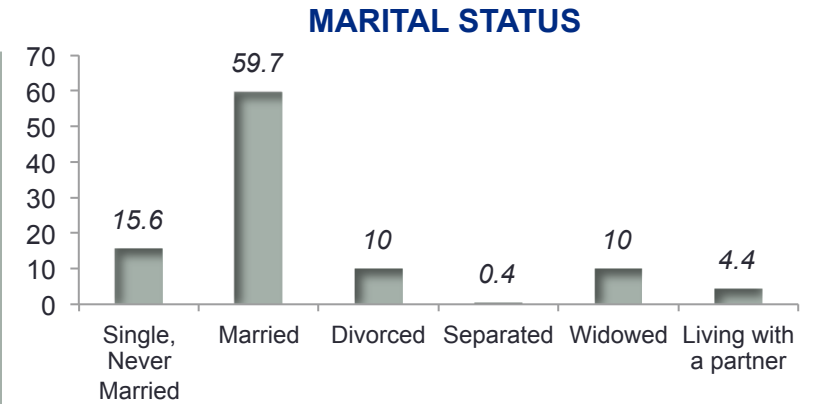
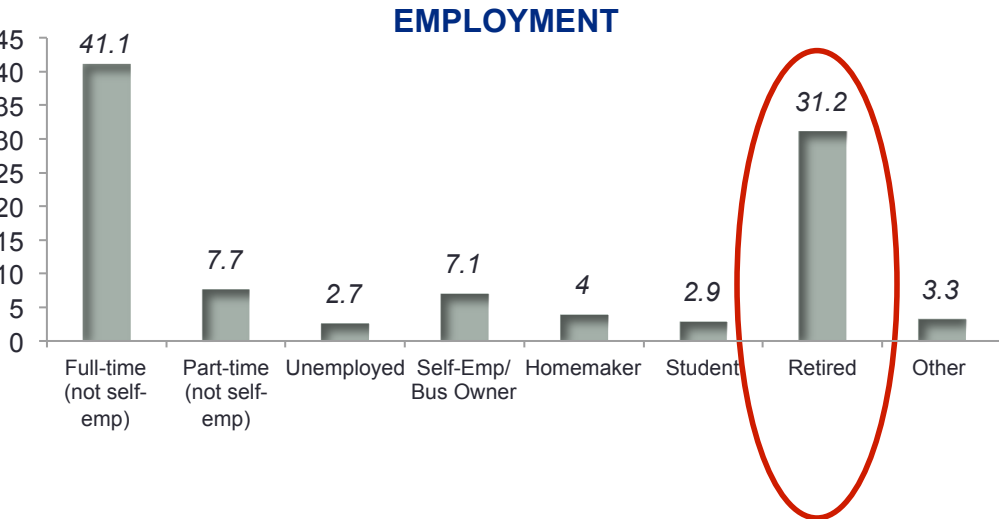
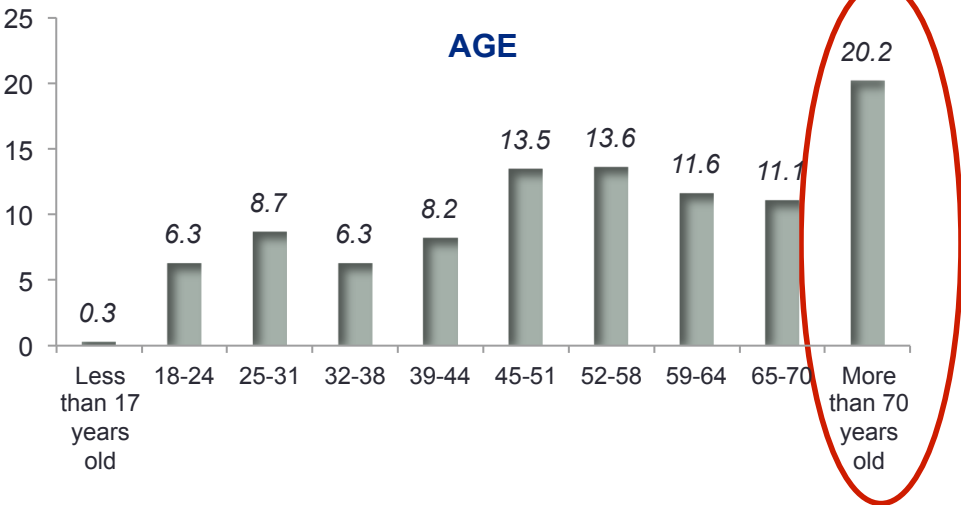
A similar report was first conducted in 2003, and again in 2007. Many of the questions in this third version have evolved based on not only prior findings, but also the changing times (e.g., technological advancements, macro environmental conditions). Therefore, any comparisons across the three points in time must be interpreted with caution.

In addition to modifications to the questionnaire, sampling methodology also changed in this most recent version. The previous two iterations were conducted via telephone; this year's survey was a mail survey with an online link option.

The mail survey fielded from April - May 2012. Given that non-library users and younger people were underrepresented, additional sample was collected in mid-late June 2012.

Results were analyzed using SPSS, a statistical software tool. Key findings from the analysis are presented throughout the report, with key takeaways outlined on the last page of the report.

Profile of Respondents



- ### POLITICAL AFFILIATION
- 30% Democrat
 - 20 Republican
 - 29% Not affiliated
 - 15% Declined to answer
 - 6% Other

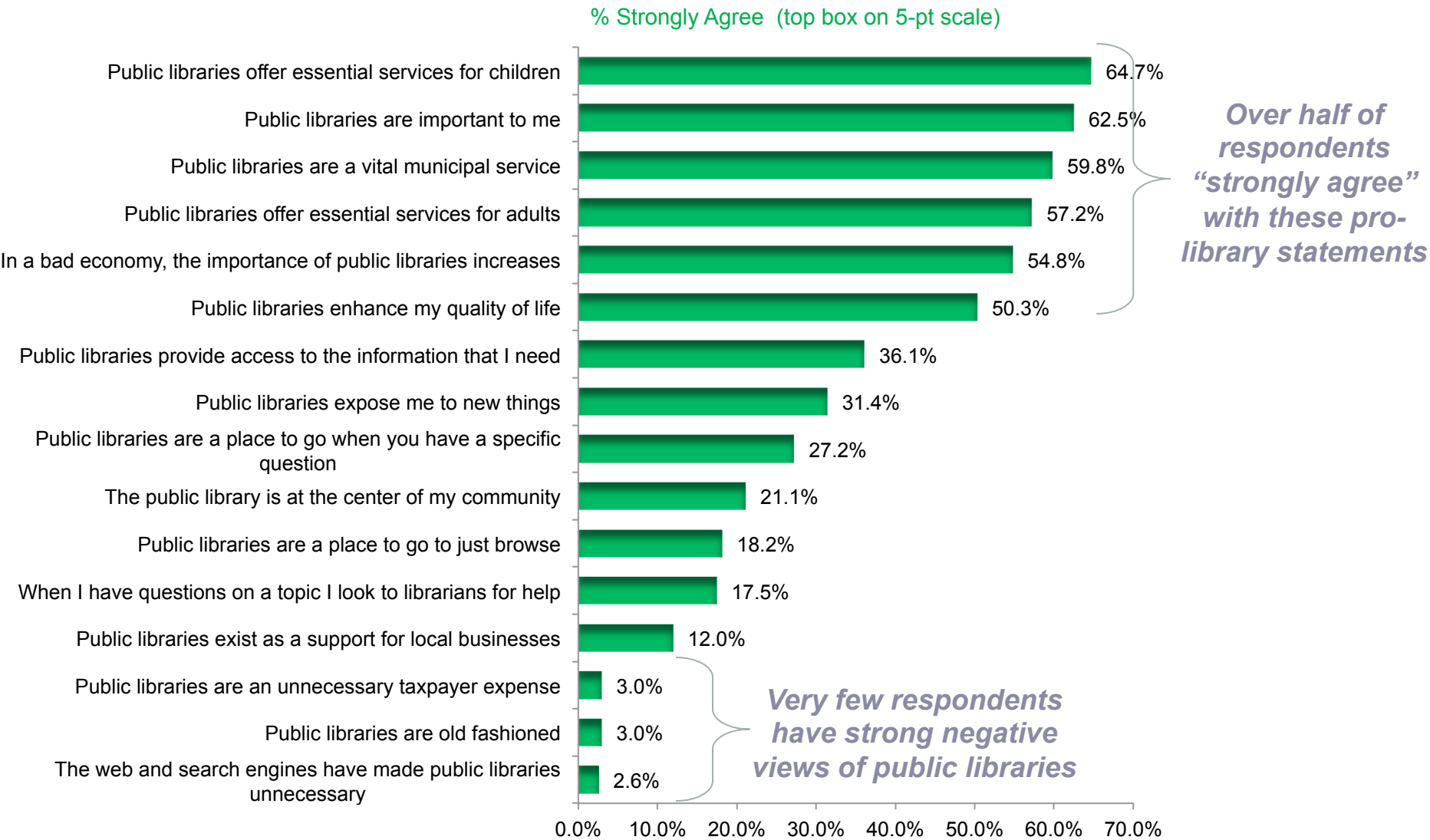
- ### VOTING BEHAVIOR
- 81% consider themselves a regular voter
 - 17% consider themselves a non-voter
 - 2% unsure

Overview

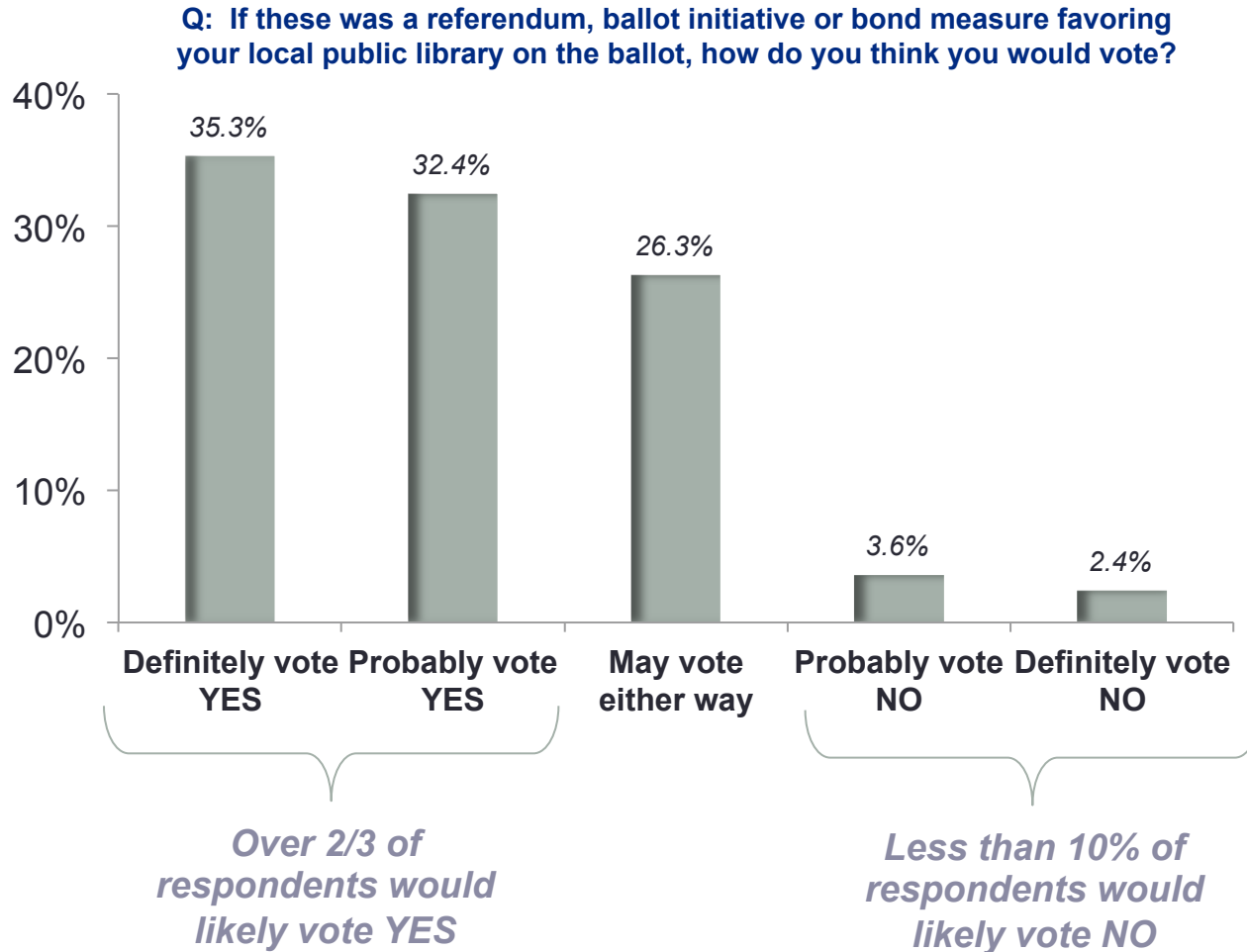
- Overall Findings
- Findings by Various Groups
 - ✓ Users vs. Non-Users
 - ✓ Supporter Segments
 - ✓ Generations
- Comparisons to Previous Years
- Key Takeaways



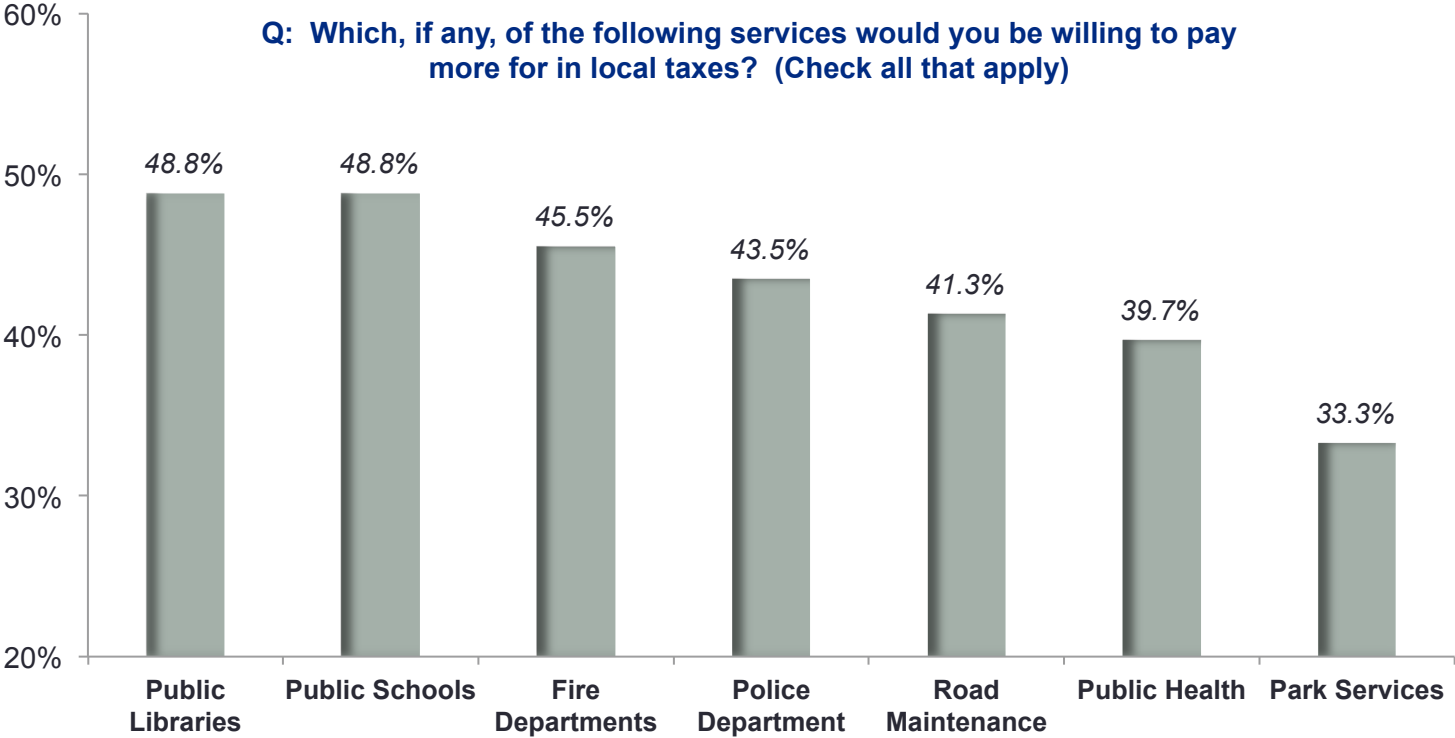
Overall, respondents have favorable attitude towards libraries...



...and would support their public library in a vote if the opportunity arises.

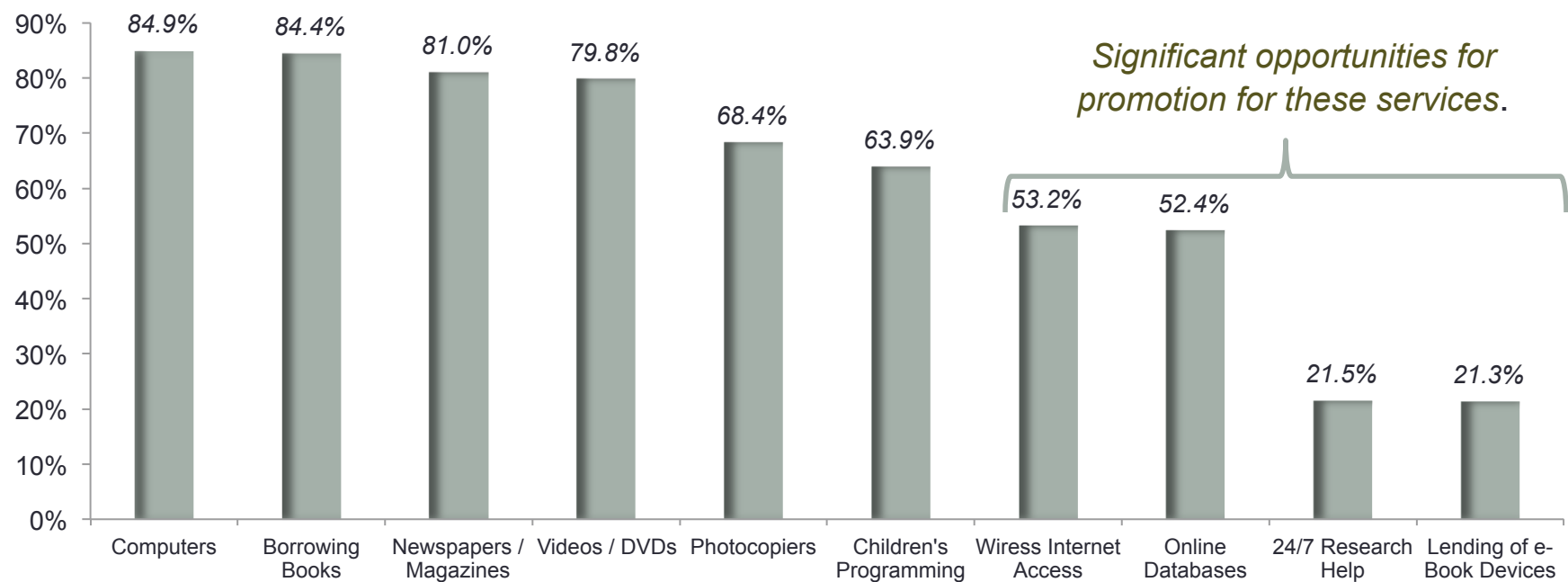


Almost half of respondents indicated that they would be willing to pay more in local taxes for public library services.



Many respondents acknowledge the broad range of services their local library offers; however, across many of the items there appears to be an opportunity to make it better known to general public what the local libraries have to offer.

Q: My library offers these services... (CHECK ALL THAT APPLY)



Many are *not* utilizing the library on a regular basis, except to find materials for personal enjoyment.

Q: Please indicate any of the reasons you have used the library in the last 4 months

“PERSONAL”

Located materials that were used for personal enjoyment 66.3%

Used a personal computer in the library 19.0%

“TRAINING / RESEARCH”

Attended a training meeting at the library 3.1%

Located materials for genealogical research 4.3%

“YOUTH ACTIVITIES”

Located materials that were for schoolwork 14.4%

Located materials that were used to read to a child 19.9%

“MEETING/EVENT”

Attended an organization or community meeting at my library 11.4%

Attended a library event geared toward adults (books, groups, speaker, 9.6%

“WORK / JOB”

Located materials that were used for work or business 17.4%

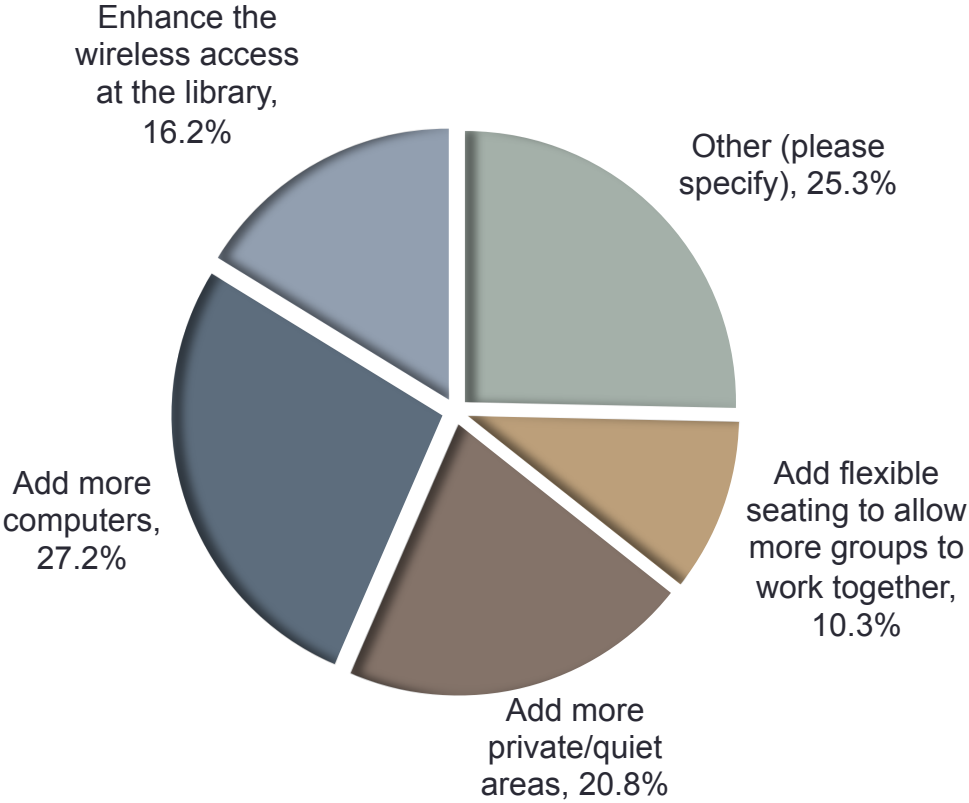
Located materials to help with a job search 5.1%

Attended story hours for children of other family programming 6.2%

Does this suggest there is an opportunity to increase awareness?

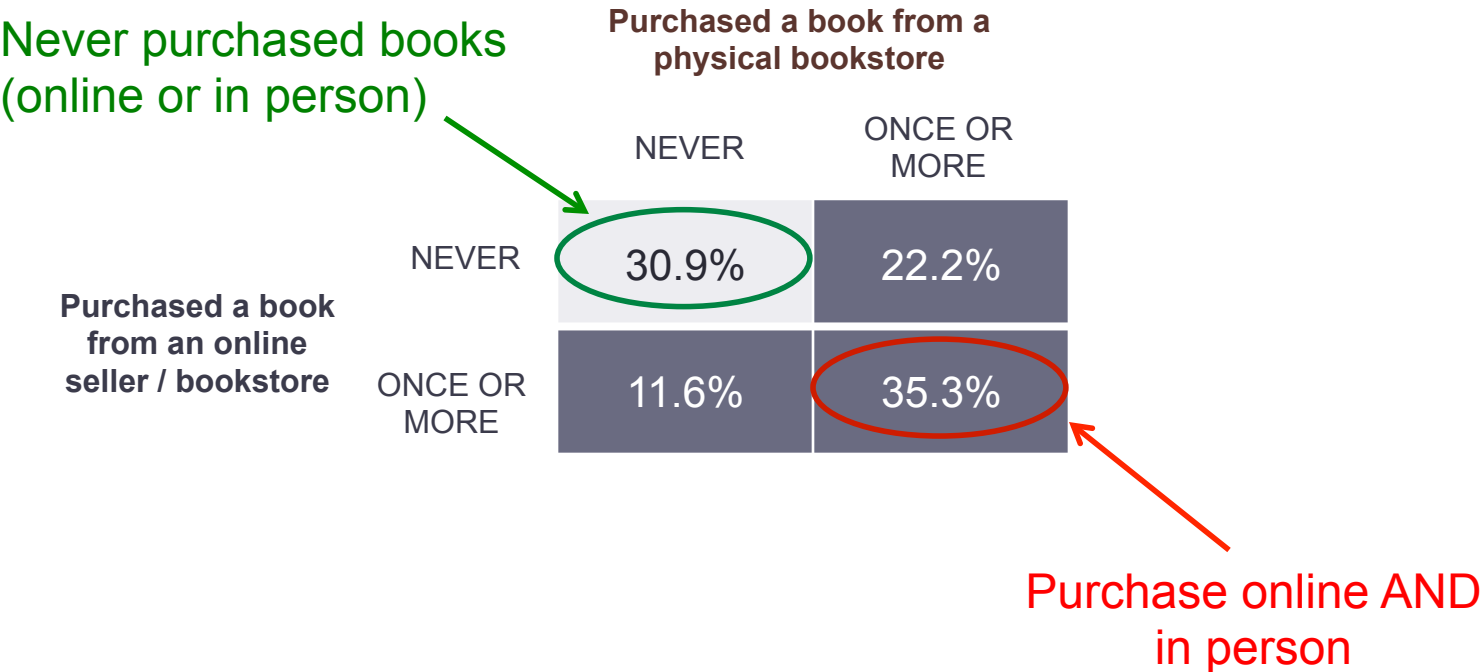
Note: Items grouped based on Principle Components analysis with varimax rotation.

There was no clear consensus on what upgrade consumers would like made if funds were available, however adding more computers ranked at the top with 27% of respondents selecting that option.

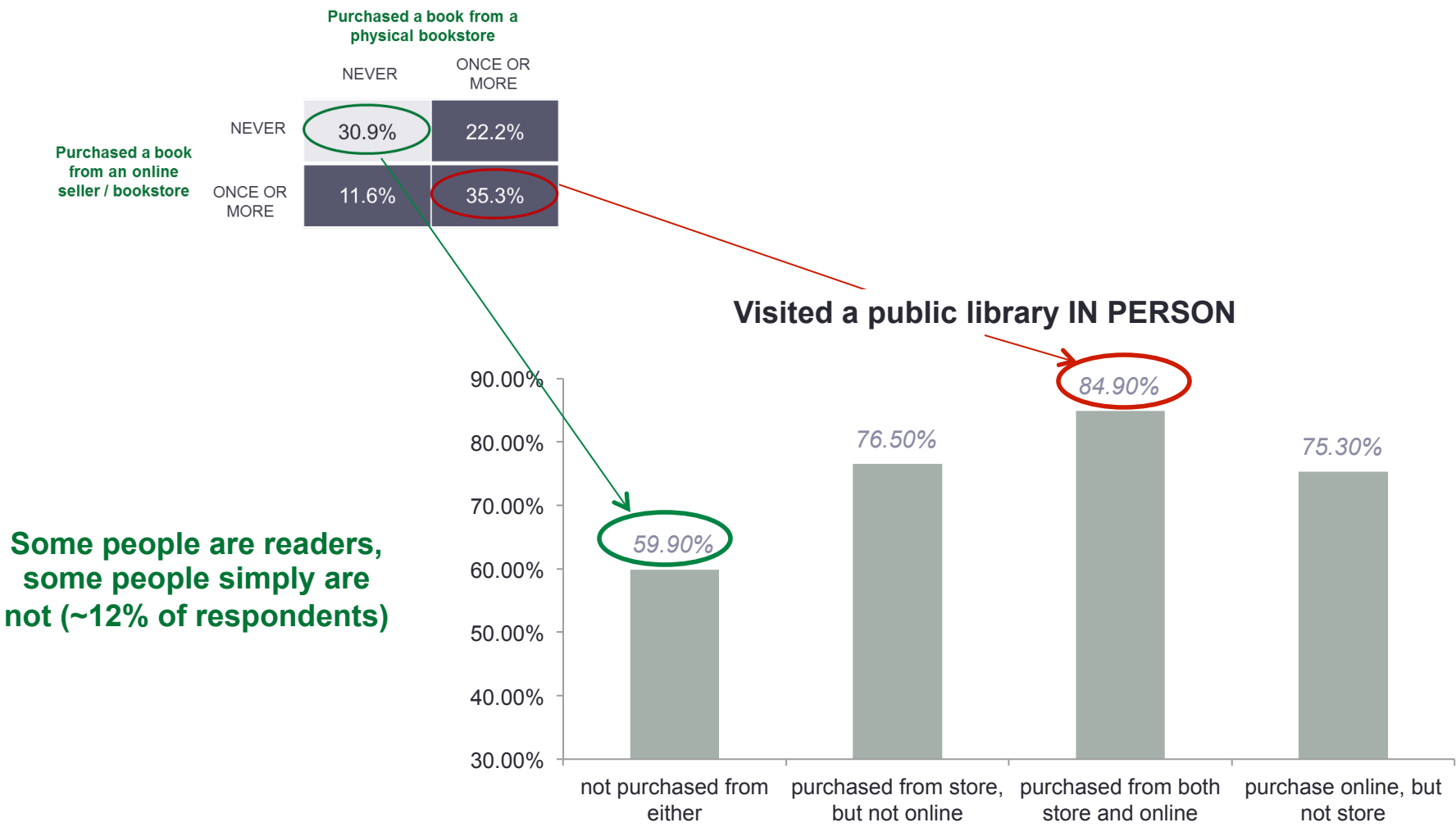


For list of “Other” responses, please see Appendix..

In the past 3 months, over 2/3 of respondents have purchased a book either from a bookstore or online, with over 1/3 purchasing from both.

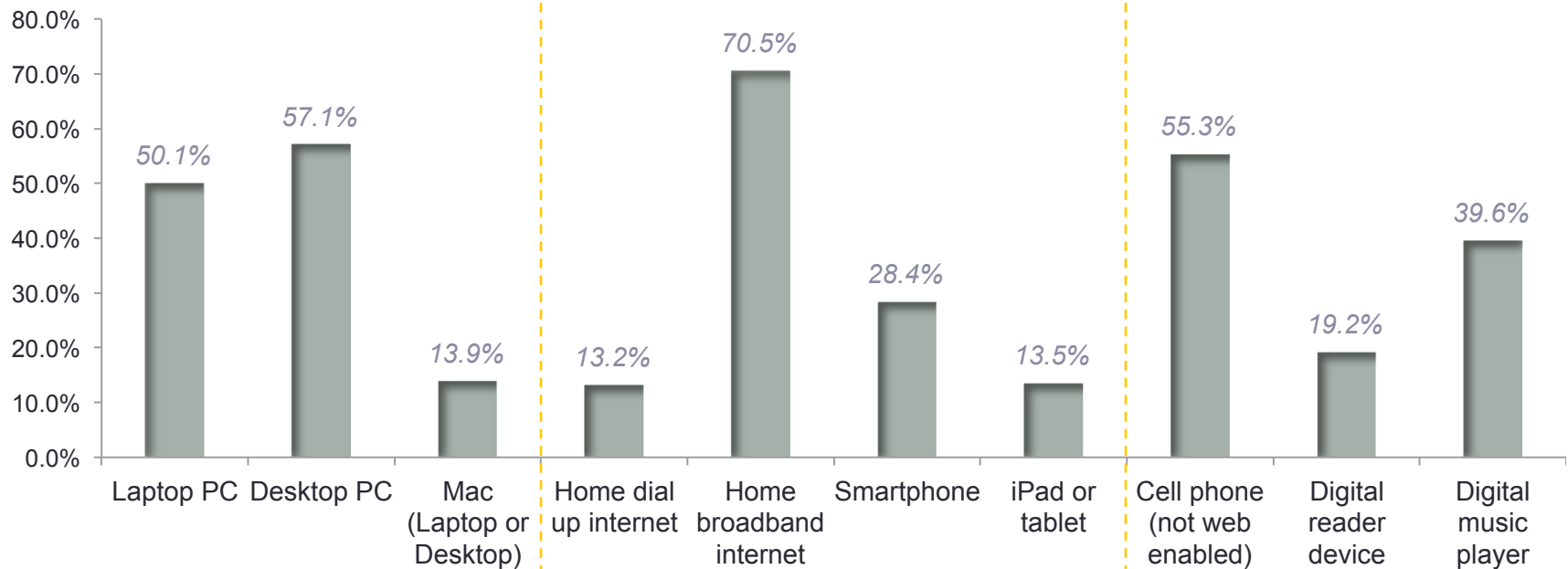


Findings suggests that people are not purchasing books as a replacement to visiting public libraries. People who are frequent purchasers of books ALSO visit libraries.



A majority of respondents have a computer and internet access.

% Currently own each of the following



COMPUTER ACCESS

- 20% do not have a computer
- 46% have one of these
- 31% have two of these
- 4% have all three of these

INTERNET ACCESS

- 21% do not have internet access
- 43% have one of these
- 28% have two of these
- 8% have three of these
- <1% have all four of these

Yet many are not utilizing these technologies as a way to gather or disseminate information.

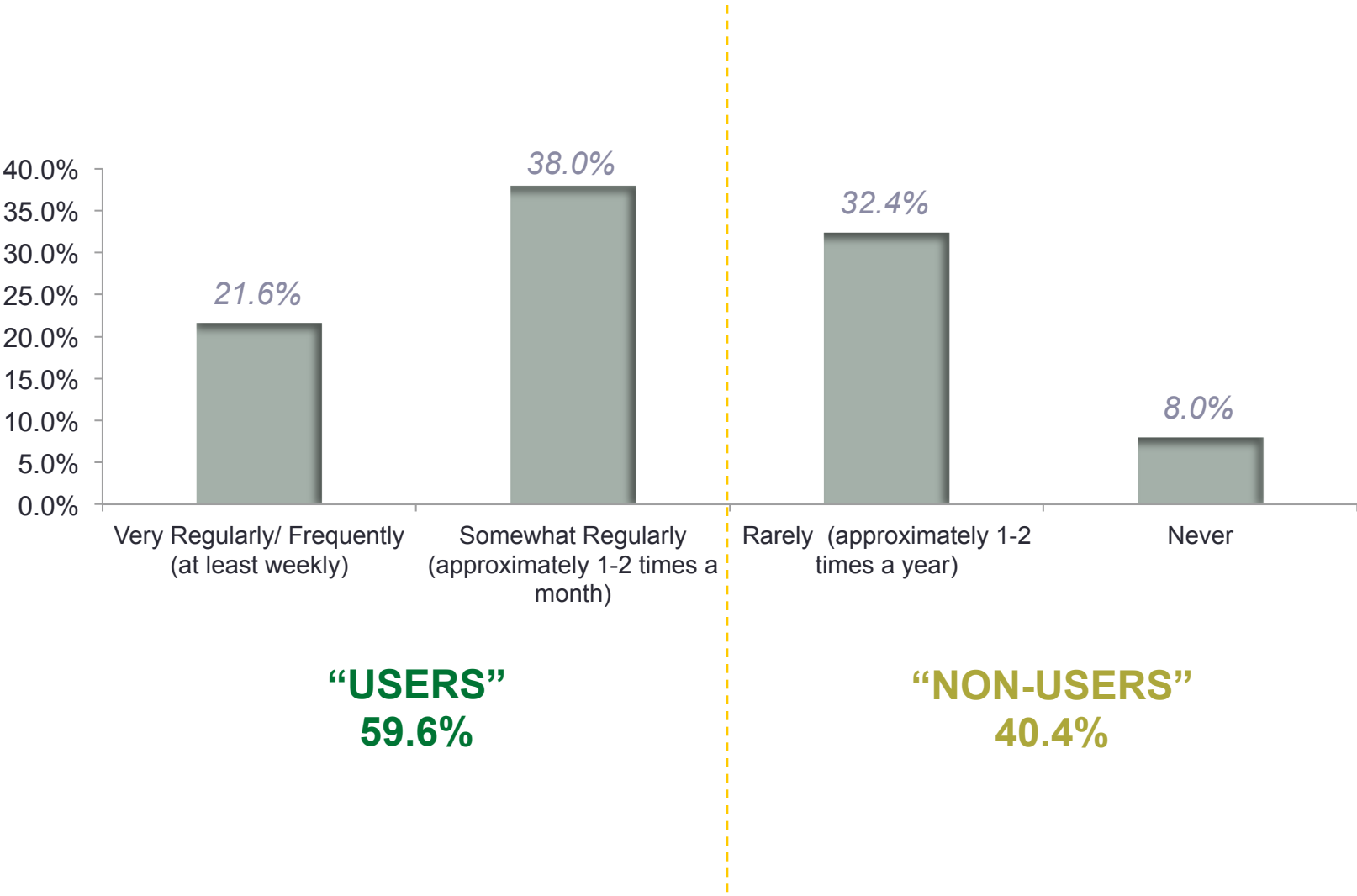


Overview

- Overall Findings
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 - ✓ Users vs. Non-Users
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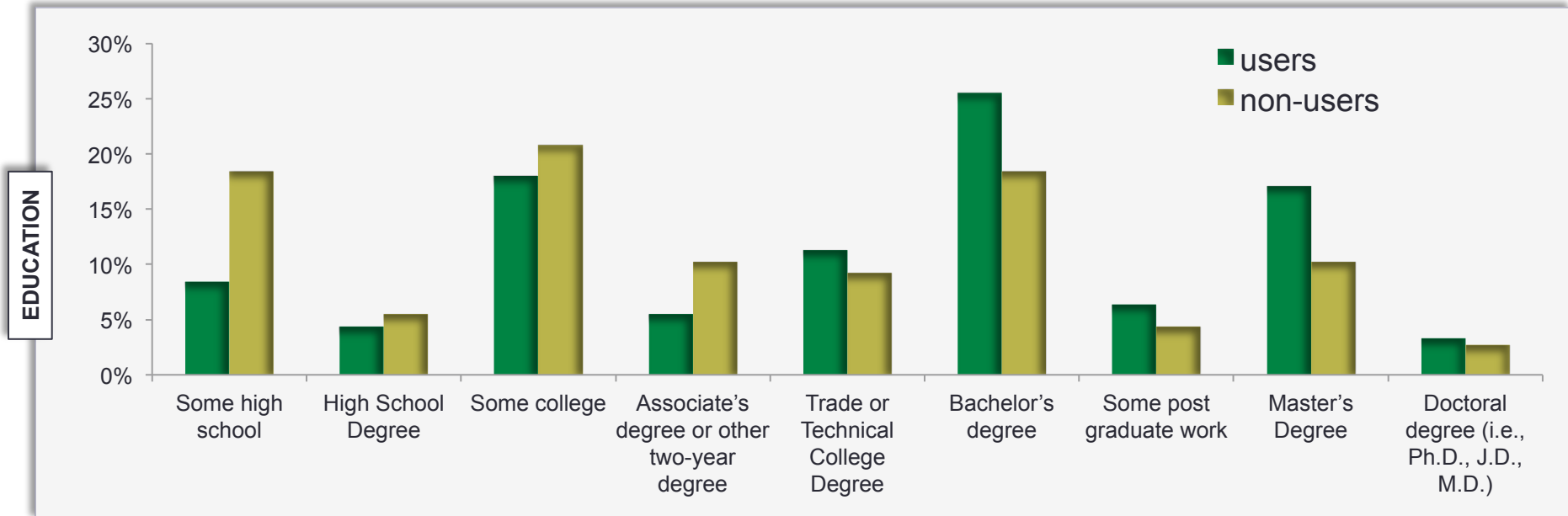
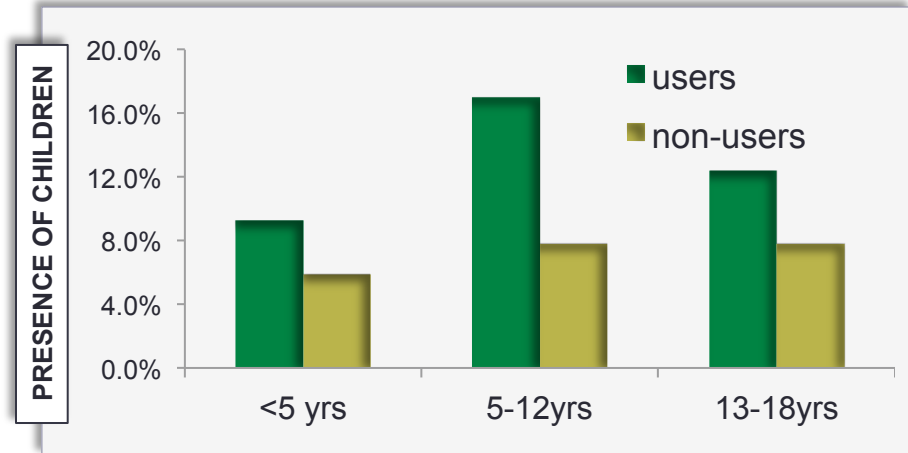
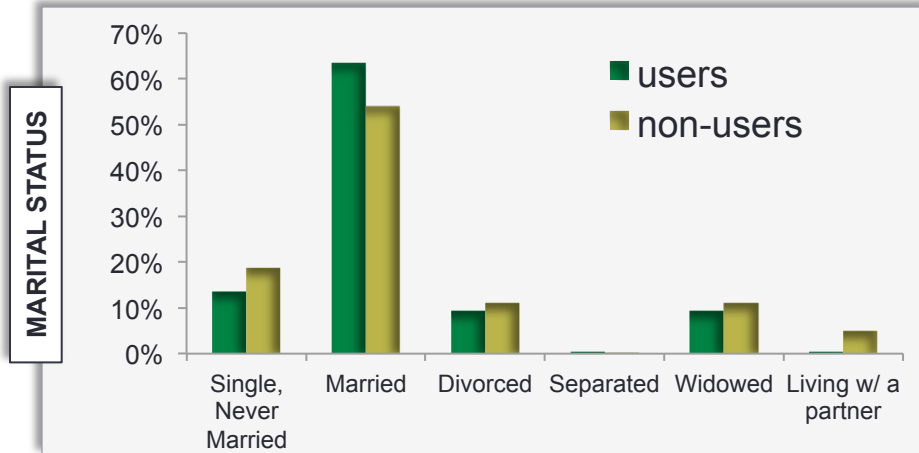
Approximately 60% of respondents are “users” of public libraries.



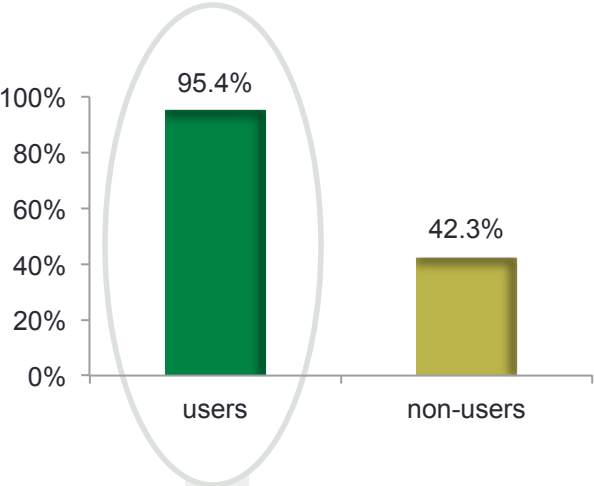
Recommend adding a response option between “Somewhat Regularly” and “Rarely” to account for people visiting 1-2 times every few months.

Users of public libraries tend to:

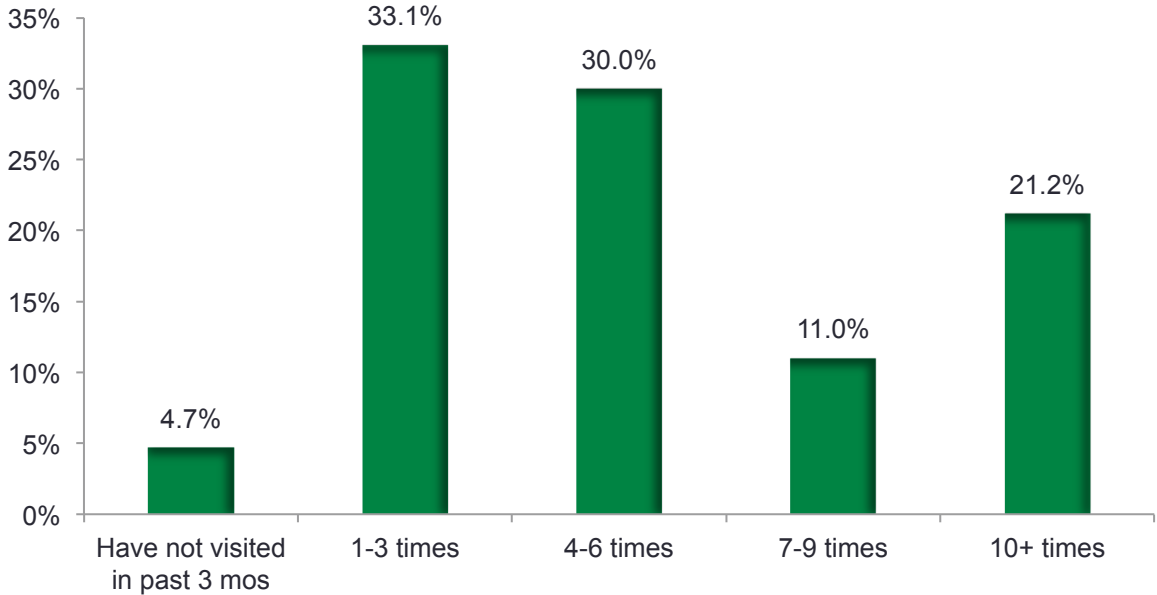
- ✓ be married
- ✓ have children under the age of 18
- ✓ be more educated



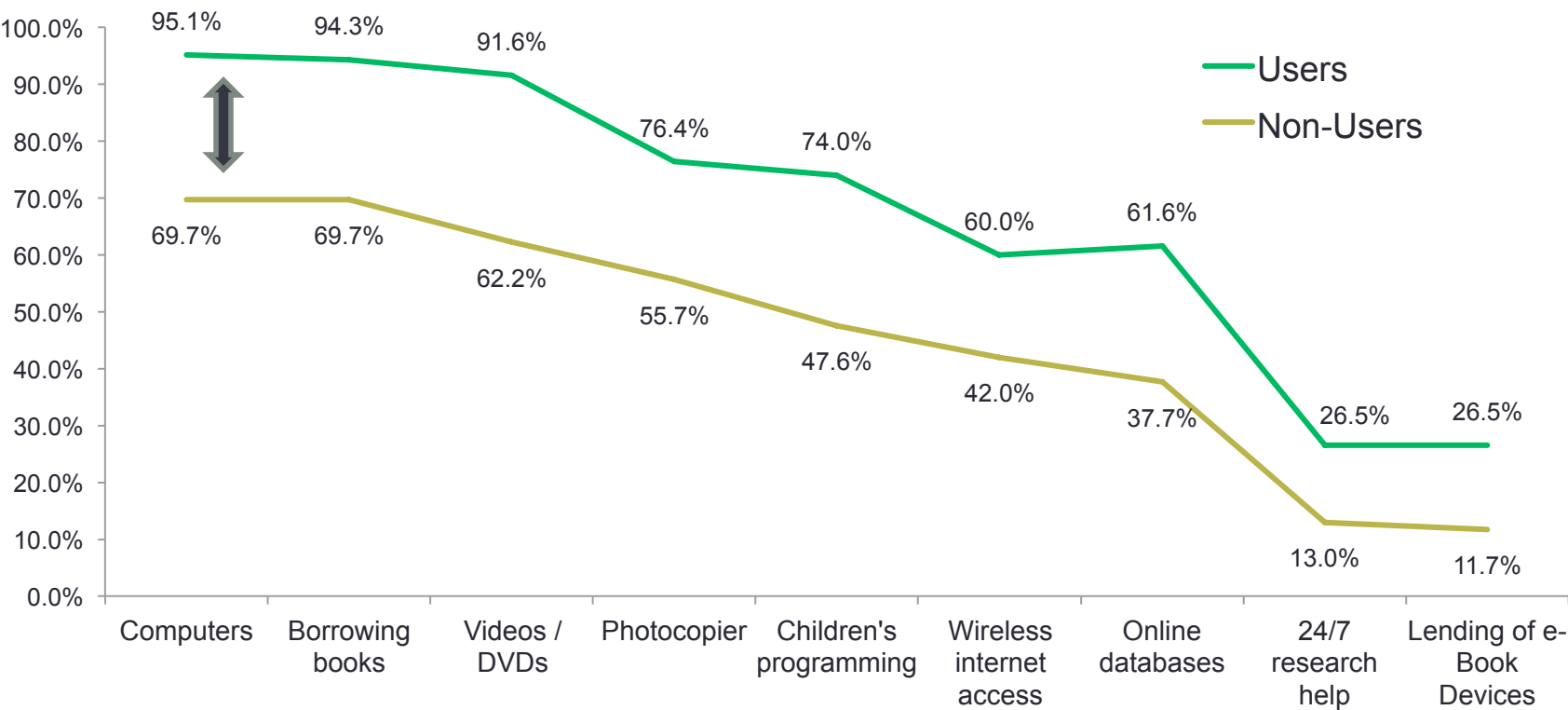
Over 95% of users have visited a public library in the past 3 months, compared to only 42% of non-users.



of times users visited library in past 3 months



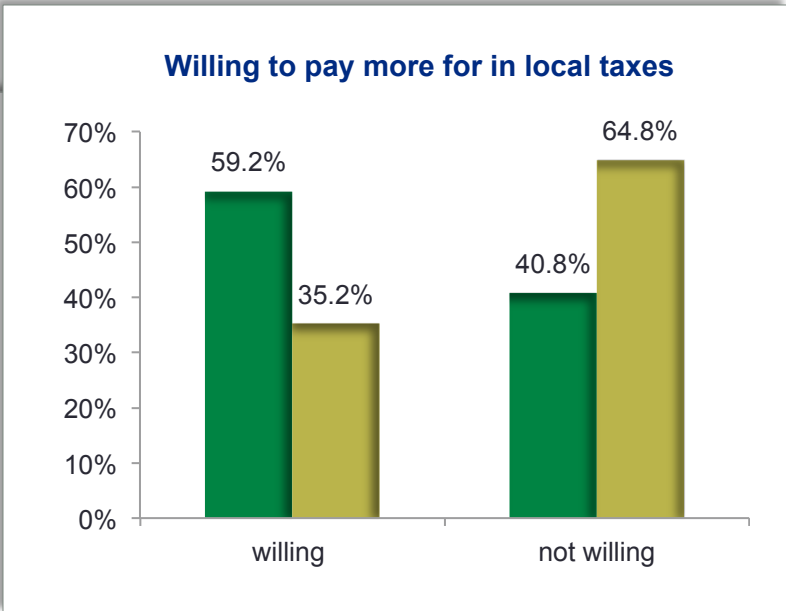
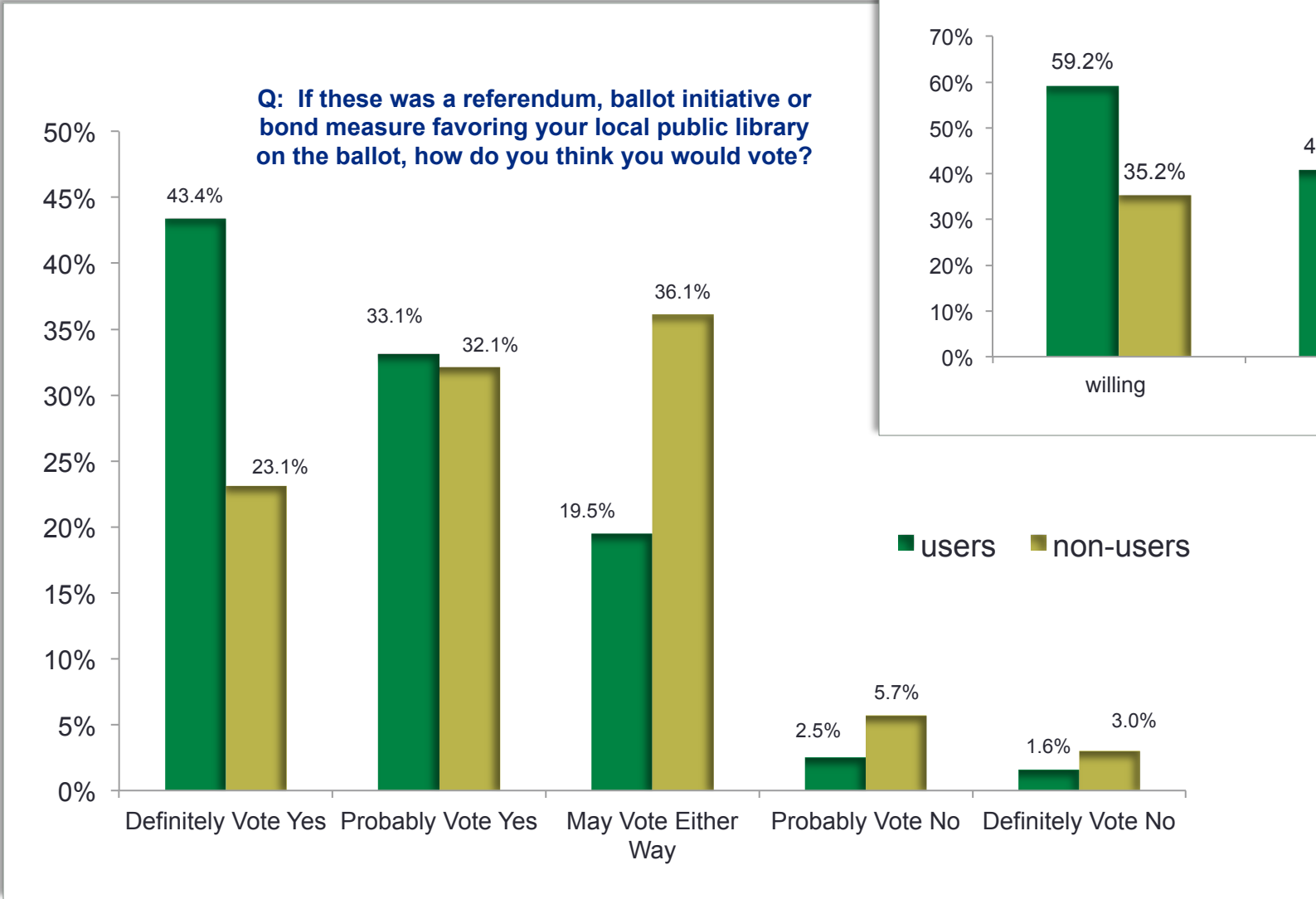
Across non-users, there appears to be an opportunity to increase awareness of what public libraries offer.



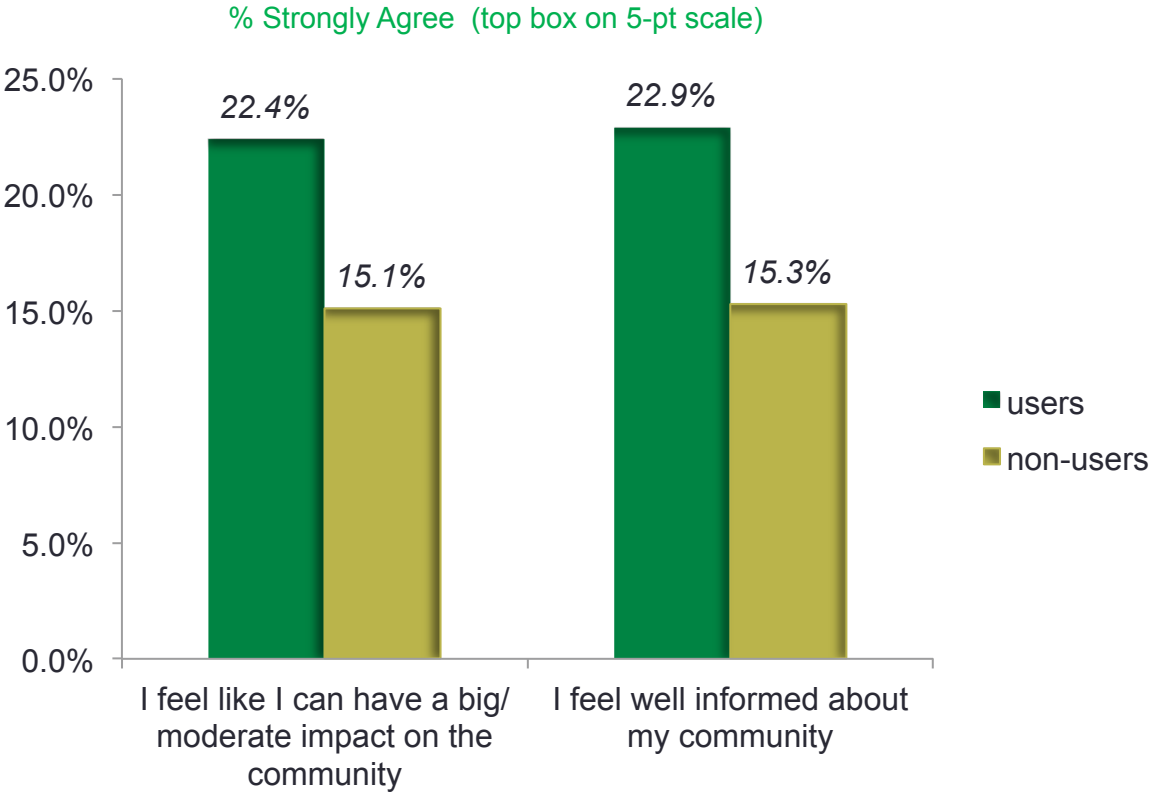
Both users and non-users top reason for using the public library is to locate materials for personal enjoyment.

Reasons for using the library in the past 4 months	Users	Non-users
Located materials that were used for personal enjoyment	87.4% #1	35.7% #1
Located materials that were used to read to a child	27.7% #2	7.2%
Used a personal computer in the library	25.8% #3	9.8% #3
Located materials that were used for work or business	21.9%	10.4% #2
Located materials that were used for schoolwork	17.9%	7.5%
Attended an organization or community meeting at my library	14.3%	6.8%
Attended a library event geared towards adults	11.9%	5.2%
Attended story hours for children or other family programming	7.9%	3.9%
Located materials to help with a job search	6.6%	3.3%
Located materials for genealogical research	5.7%	2.3%
Attended a training at the library	3.8%	2.0%

Users are more likely to support public libraries.



They are also more likely to feel empowered and informed.



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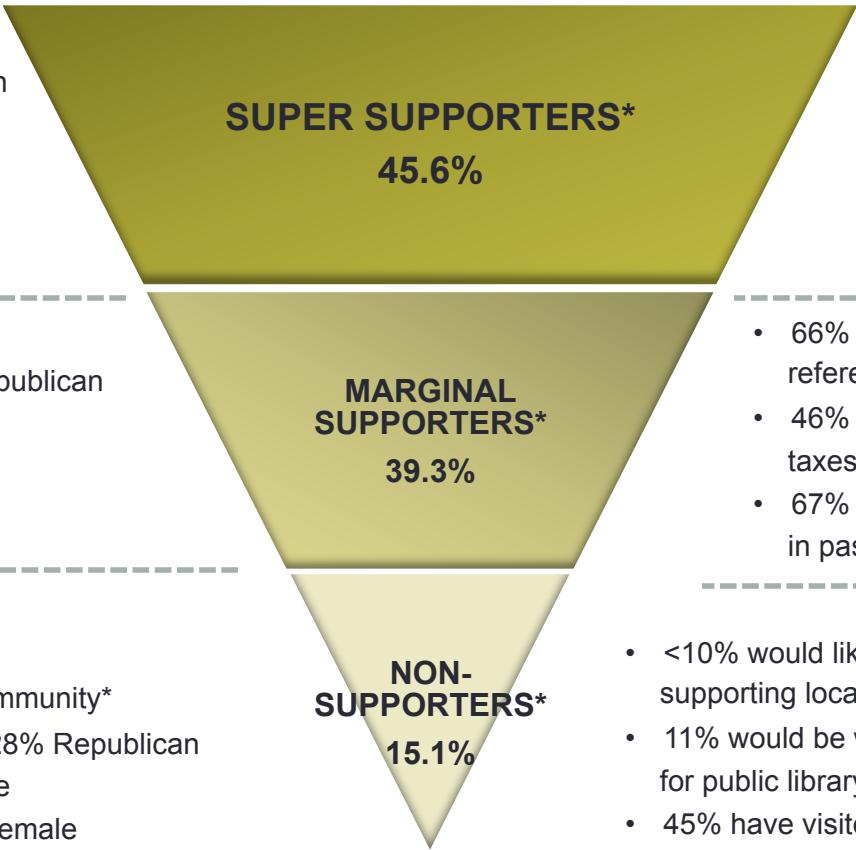
Who are the strongest supporters of public libraries?

WHO ARE THEY?

- Most tech challenged*
- Strong community advocates*
- 39% Democrat / 15% Republican
- 88% regularly vote
- 54% female / 46% male
- Skew older; have the most Baby Boomers

- 27% Democrat / 23% Republican
- 78% regularly vote
- 54% male / 46% female

- Most tech savvy*
- Weak belief in community*
- 14% Democrat / 28% Republican
- 75% regularly vote
- 65% male / 35% female



ATTITUDES TOWARDS LIBRARY

- 89% would likely vote in favor of a referendum supporting local library
- 66% would be willing to pay more in local taxes for public library services
- 86% have visited a public library in-person in past 3months, with 30% visiting 7+ times

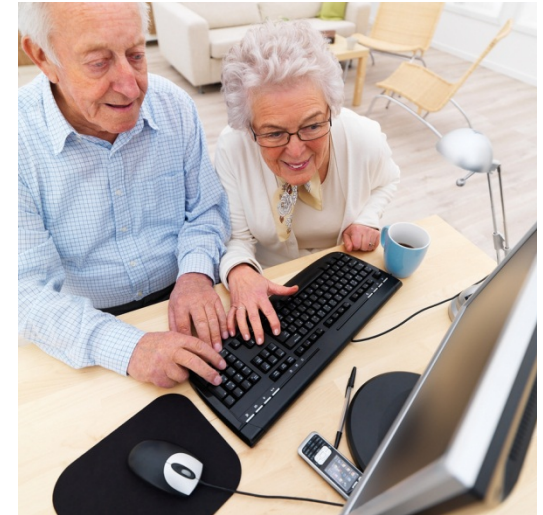
- 66% would likely vote in favor of a referendum supporting local library
- 46% would be willing to pay more in local taxes for public library services
- 67% have visited a public library in-person in past 3months, with 14% visiting 7+ times

- <10% would likely vote in favor of a referendum supporting local library
- 11% would be willing to pay more in local taxes for public library services
- 45% have visited a public library in-person in past 3months, with 6% visiting 7+ times

* Based on segmentation analysis. Library support segmentation based on Q13 and Q8; Technology segmentation based on Q15; Community support segmentation based on Q6.

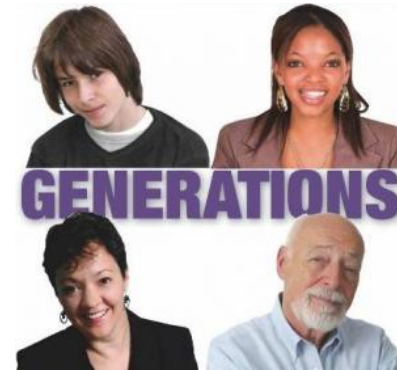
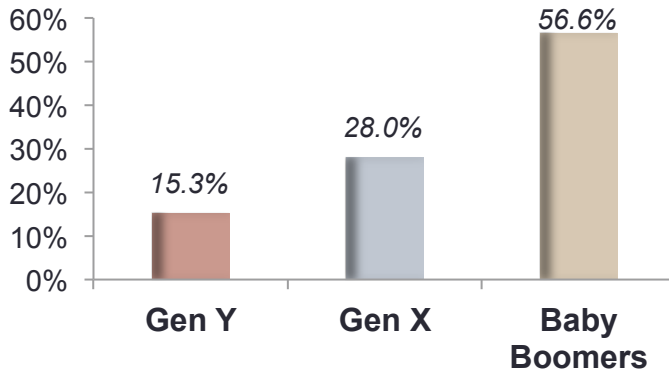
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Gen Y-ers do not visit libraries as frequently as the other generations.

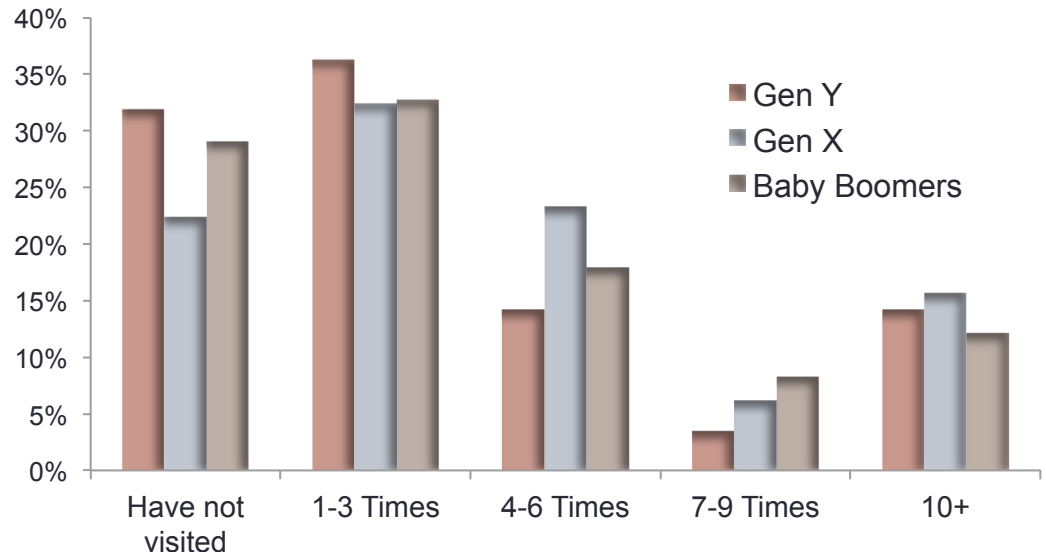
% of respondents



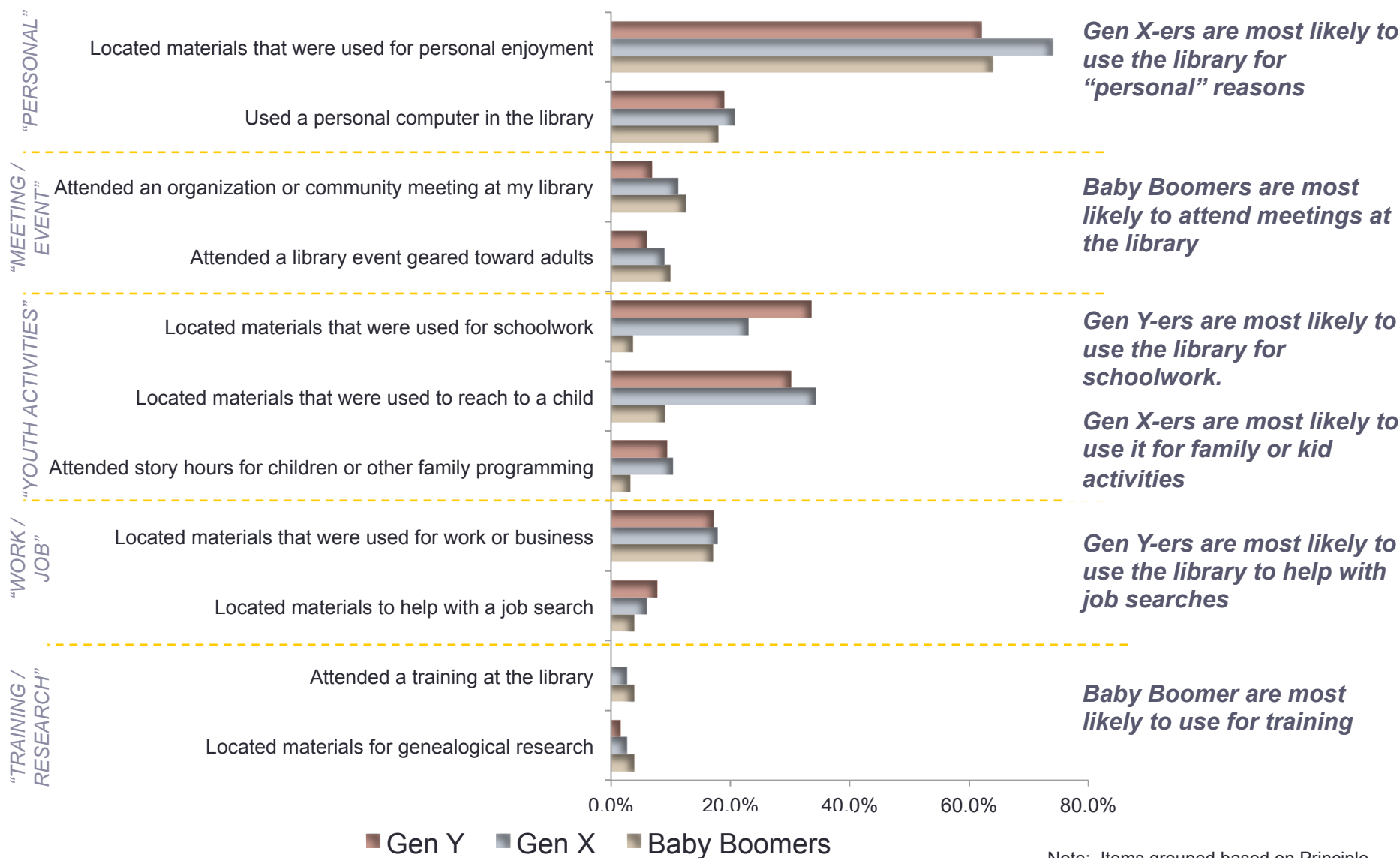
Given that age was collected as a categorical variable, for analysis purposes – responses were classified as follows:

- Generation Y = 31 and under;
- Generation X = 32-51;
- Baby Boomers = 52 and up.

of times users visited library in past 3 months

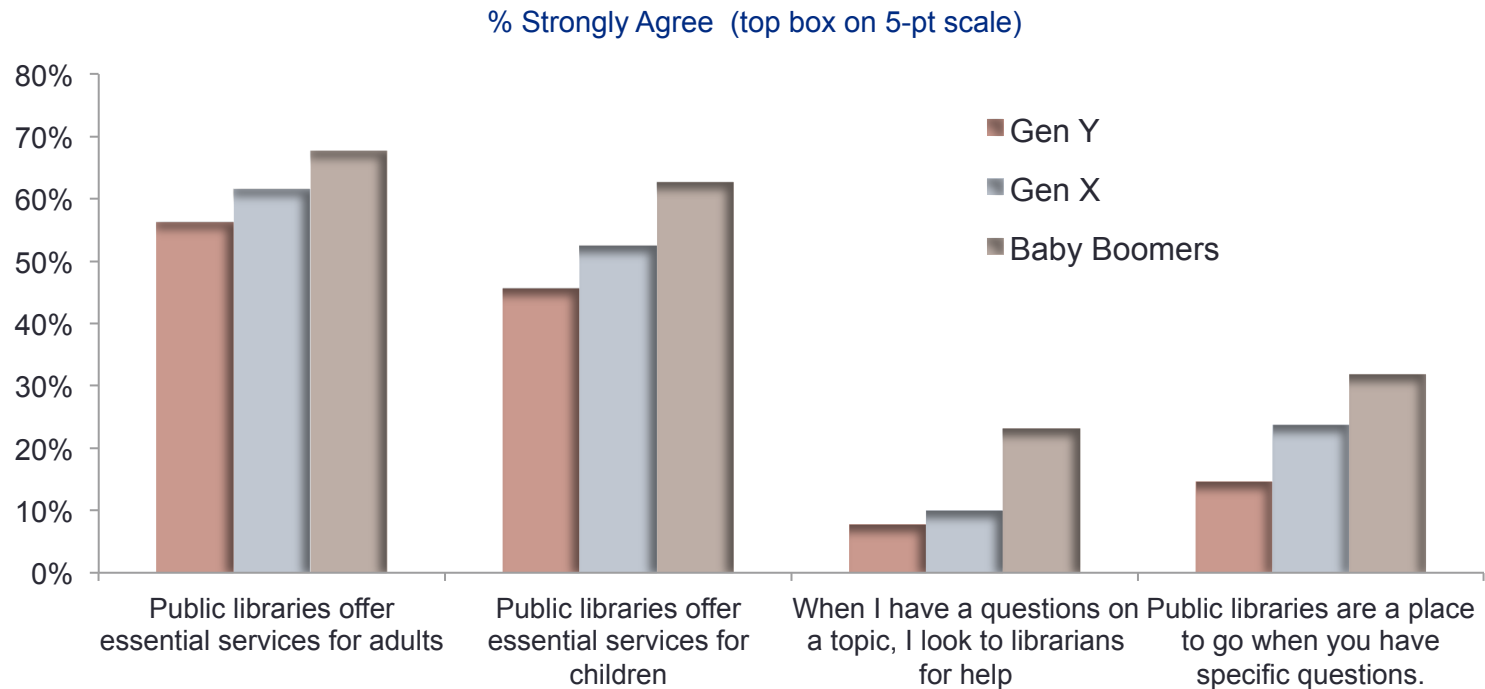


As anticipated, different generations use the library for different reasons...



Note: Items grouped based on Principle Components analysis with varimax rotation.

...and have different perceptions of public libraries, with favorable perceptions decreasing with each generation.



What can be done to address the improve perceptions of public libraries across the younger generations?

Note: Responses are consistent across the vast majority of library perception items.

Gen Y-ers are more likely to own technologies, and consequently, are more likely to feel that technology has decreased the need for libraries.

	Gen Y	Gen X	Baby Boomer	
Smartphone (iPhone, Android, etc.)	63.8%	39.6%	14.0%	<i>Less than 3% of Gen Y-ers do not have internet access, compared to 30% of Baby Boomers.</i>
A cell phone that is NOT web-enabled, cannot browse the Internet	38.8%	54.2%	61.0%	
Home dial up Internet access	1.7%	10.8%	16.4%	
Home broadband Internet access (DSL, Cable, etc.)	88.8%	81.1%	60.5%	<i>5% of Gen Y-ers do not have a computer, compared to 29% of Baby Boomers.</i>
Laptop PC	72.4%	62.7%	37.9%	
Desktop PC	48.3%	68.9%	53.5%	
Mac (Desktop or Laptop)	19.0%	17.5%	9.6%	
iPad or other tablet device	17.2%	18.9%	9.6%	
A digital reading device like a Nook or Kindle, etc.	23.3%	24.5%	14.7%	
A digital music player like an iPod, Zune, or Sandisk	75.9%	59.0%	20.1%	

Generations also had different preferences for what public libraries should do if money were available for small upgrades to the space.



GEN Y

- Add more private quiet areas 25.7%
- Enhance the wireless access at libraries 24.8%



GEN X

- Add more computers 30.6%
- Other 25.9%

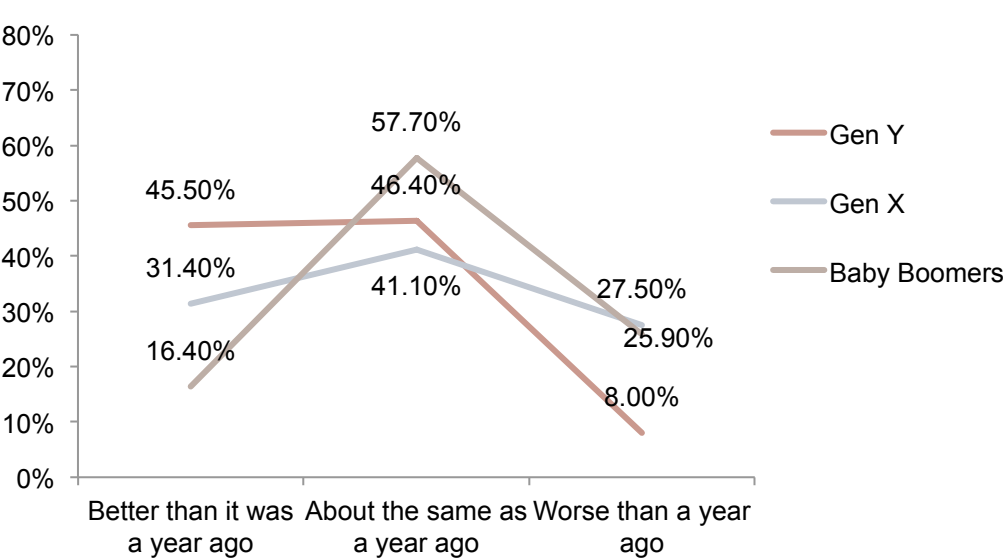


BABY BOOMERS

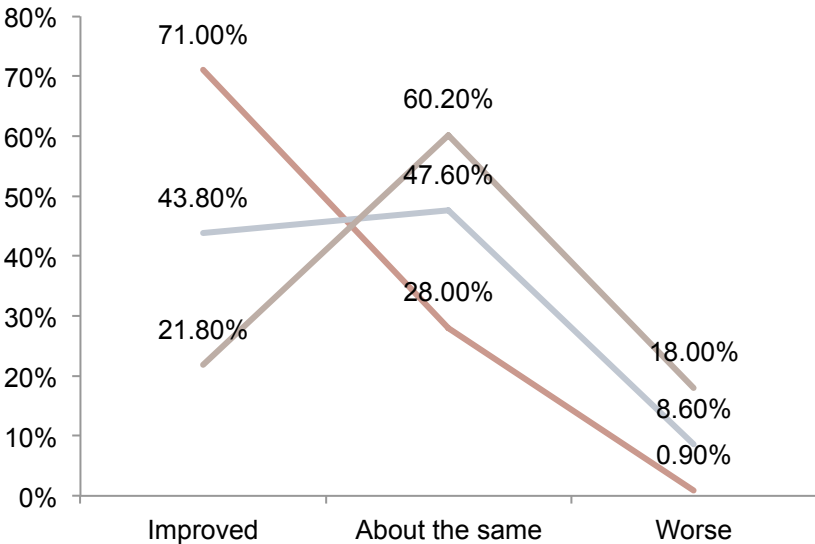
- Add more computers 27.8%
- Other 26.7%

Gen Y-ers have the most optimistic view of their financial outlook.

Is your financial outlook....



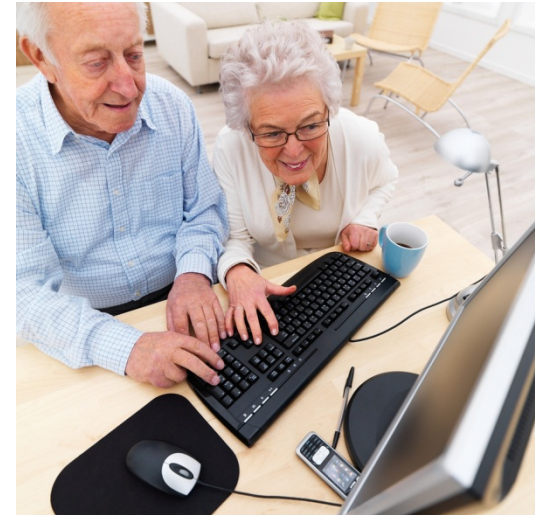
How you anticipate your financial outcome will look 3 years from now...



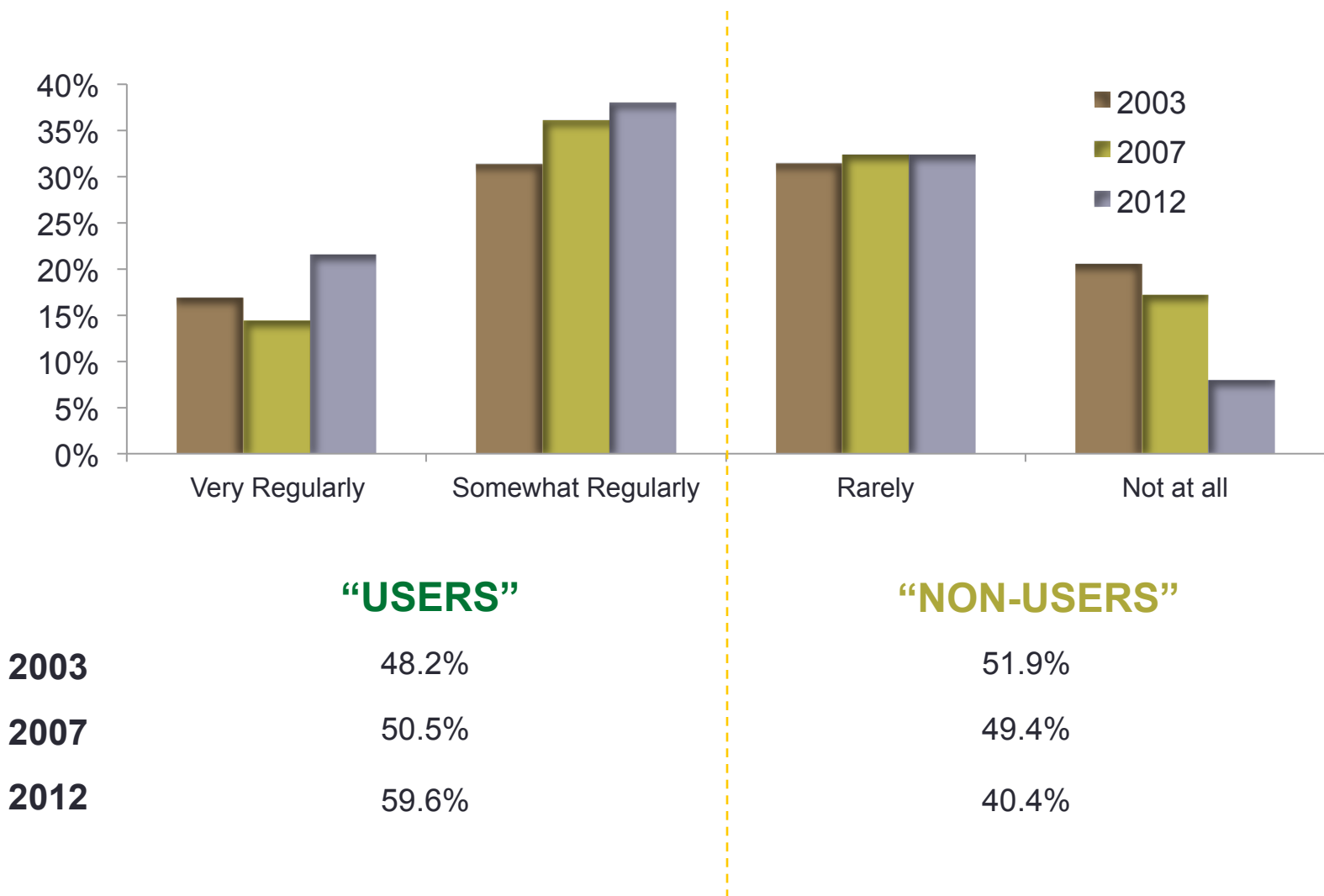
How can public libraries help Gen Y-ers achieve an improved financial outcome ?

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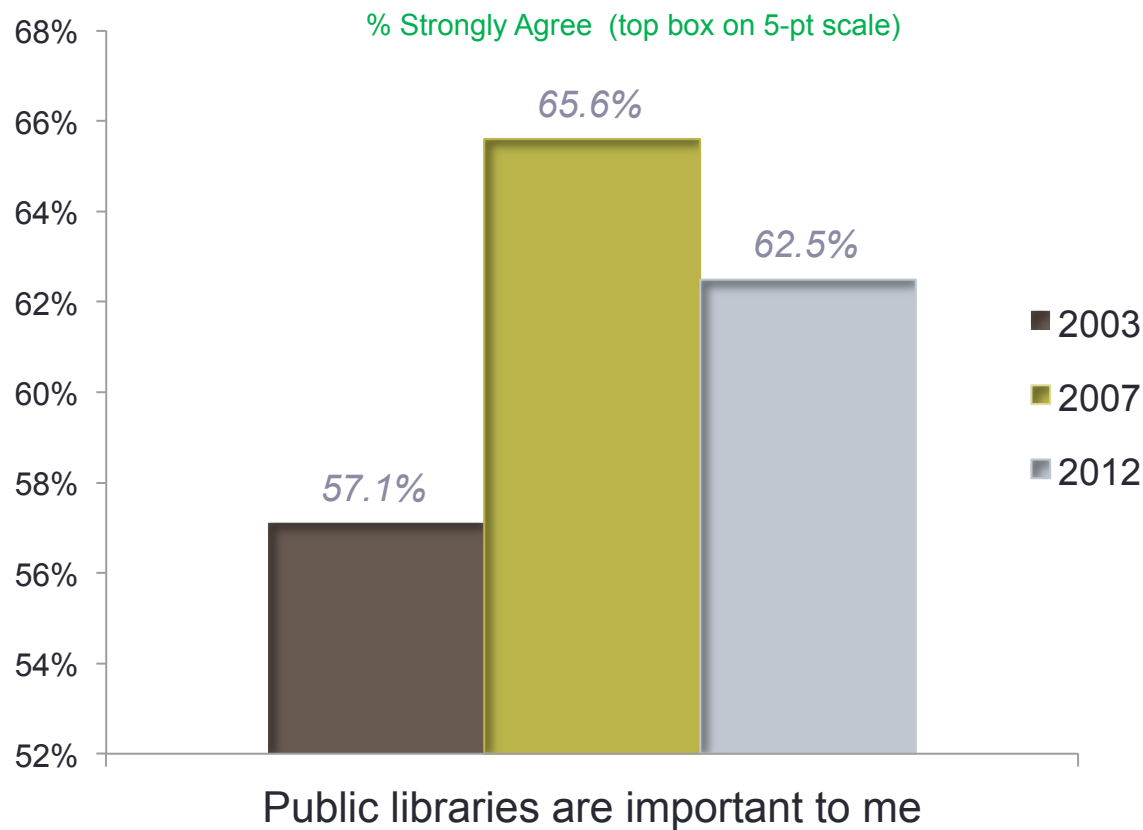


There are more “users” responding to the survey this year than in the past.



NOTE: Differences could be due the difference in sampling methodology and/or the skew to older respondents.

Across the three survey time periods, people's feeling regarding the importance of public libraries has fluctuated slightly.



There are some difference in the usage of public libraries across the years.

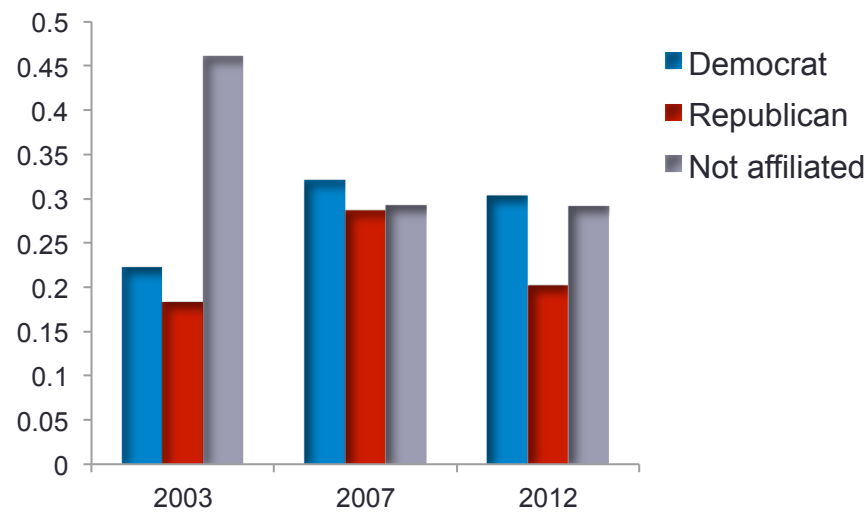
HOW USED THE LIBRARY (users only)	2003	2007	2012
Personal Enjoyment	93.2%	84.6%	87.4%
Children's Reading Materials	58.2%	43.7%	27.8%
Schoolwork/ Business	49.3%	45.5%	35.5%*
<i>Located materials for schoolwork</i>			17.9%
<i>Located materials for work or business</i>			21.9%
Internet Access/ Computers	26.2%	28.1%	25.2%
<i>Used a personal computer in the library</i>			
Conducted a Job Search	10.5%	11.3%	6.6%

* The number of respondents that did one or both of these.

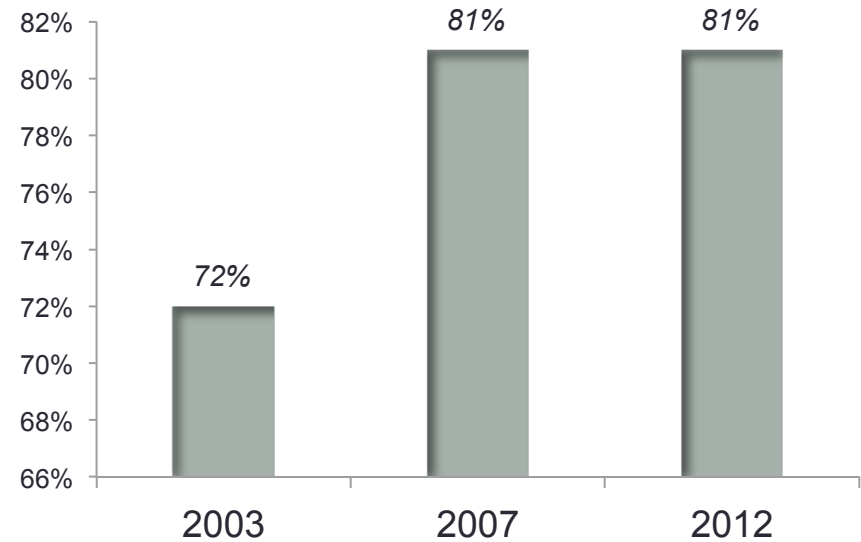
NOTE: Differences could be due the difference in sampling methodology and/or the skew to older respondents.

Political affiliation and voting behavior across respondents is very similar to 2007.

POLITICAL AFFILIATION



VOTE IN MOST RECENT ELECTION



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Key Takeaways

- Identify ways to increase awareness of what the local public libraries have to offer, especially among current non-users (e.g., online databases: almost all public libraries in WI offer this service, yet only 50% are aware of this.)
- Target efforts to the “marginal supporters” – these respondents are most likely to become super supporters if they are able to see the value, the benefits, and the uses for a public library.
- Identify opportunities to reach Generation Y. For example, these people have a positive financial outlook – how can the library help them? These people are most likely to have a smartphone or digital music player – what service can the library offer them for use on these devices?
- When focused on improving usage across the library, determine whether the biggest opportunity is to attract more of the same (e.g., get more Gen X-ers to use the library for kid-related activities), OR to attract new user (e.g., current non-users).



Questions?



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