

Washington State Libraries Marketing Initiative Attitude & Usage Tracking Report

July 2005



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Purpose & Objectives

- The purpose of this study is to identify existing attitudes, perceptions and usage of Washington State libraries and their services.
- The objective is to compare 2005 survey findings against the 2004 baseline in order to determine shifts in these measures and gauge the effectiveness of the library marketing initiative.



Methodology

Technique:	Telephone Interviews – random digit dial Interviews conducted June 2004 and June 2005
Participants:	Washington State residents 2004: 201 participants 2005: 205 participants
Criteria:	Households with children to age 18 living at home Representative of WA State demographics Not employed within the library system
Interview Length:	Approximately 11 minutes
Statistical Reliability:	At the 95% confidence level, a sample of 200 is reliable within $\pm 7.1\%$ points.



Key Findings

1. The majority of measures remained consistent from 2004 to 2005 (any statistically significant changes are noted).
2. There is a notable increase in perception of the library as a “place to borrow books” from 2004 to 2005 (44% up to 52%), which corresponds with a significant decline in the more functional “building/place full of books” description (34% down to 16%).

This is a positive shift to a more benefit-oriented brand perception.

3. The ability to search for library materials via the computer is one of the most highly valued services (4.3 average rating on a 1-to-5 scale). Yet, even though 96% have Internet capability, only 64% access the library online.

There is opportunity to increase library usage via online access.

4. While not a statistically significant change, there is a notable decline in awareness of advertising/PR regarding libraries from 2004 to 2005. **This is likely due to the high level of library construction publicity that occurred in 2004 but not in 2005**, as indicated by a significant decline in recall of the construction message in 2005 (from 41% to 16%).



Conclusions

Library Visits and Behavior
Perceptions and Attitudes
Online Library Usage
Marketing Implications



Library Visits and Behavior

- There is a notably higher intent to ‘definitely’ visit the library in the next six months among existing patrons (71% up to 76%). Among the general population it remains consistent at 58%.
 - The ‘net’ intention to visit continues to be high at 88% for both groups.
- Average personal visits are consistent with the previous year, averaging 23.3 times per year; and online average visits averaging 19.3 times per year.
 - Borrowing books continues as the service used most.
- There is no significant change in library card ownership or library visits.
- More than one-third of library patrons state that they used more library services in the previous year – this is consistent with the 2004 baseline study.



Perceptions and Attitudes

- People continue to perceive the library as a positive place with a variety of services, and as a source for more than books, but also for knowledge and information.
- There is notable increase in perception of the library as a “place to borrow books” from the previous year (44% up to 52%), and a corresponding significant decline in the more functional “building/place full of books” description (34% down to 16%).
 - This is a positive shift to a more benefit-oriented brand perception.
- People continue to perceive libraries as much more than simply books and materials. What is most appealing is the intangible – the availability and access to knowledge and information.
- 100% of the general population (including library patrons) continue to believe libraries are Very/Fairly Important. No one rated libraries as not important.



Perceptions and Attitudes

- As a way of making libraries more valuable, ‘longer hours of operation’ has become slightly more desired than last year (17% vs. 21%). At the same time, ‘more selection’ is of less concern than last year (17% down to 11%).
- In addition to borrowing materials - using the computer catalog, renewing books online and connecting to the Internet at the library are all highly valued services.
- Consulting a librarian and children’s activities continue to be very valuable to the community.
- Classes, workshops and programs are not perceived as highly valuable – this may be due to lack of awareness and availability.
- More than one-third of the people continue to state that they know of no unappealing elements about the libraries. This is consistent with the high perceived value and importance of libraries.



Perceptions and Attitudes

- People continue to believe they are not very knowledgeable about all the available library services, despite the high value they place on libraries. While there is a slight increase in the average level of perceived knowledge (3.3 to 3.4 on a 1-to-5 scale), there remains significant opportunity to educate people about the variety of library offerings and benefits.
- While not statistically significant, there is a notable decline in awareness of advertising/PR regarding libraries from 2004 to 2005 (40% to 33%). A strong possibility for this is the high level of library construction publicity that occurred in 2004, indicated by a significant decline in recall of that message in 2005 (41% down to 16%).
- Recall of marketing messages about library programs (kids & adults) and events increased significantly among those that recalled library communications (12% to 28%).
- Awareness of the different types of libraries remains consistent – with highest awareness of school, academic and legal libraries, and lowest awareness of tribal libraries.



Online Library Usage and Attitudes

- The ability to search for library materials on their personal computer is one of the most highly valued services (4.3 average on a 1-to-5 scale).
- Connecting to the Internet at the library is also a valued service (3.9 average rating on a 1 – 5 scale); 44% of library visitors do so.
- Today, even more people have online both at home and at work: 74% in 2005 vs. 66% in 2004

YET,

- Even though 96% of patrons have Internet capability, only 64% actually access the library online.
- Significantly fewer people used the online computer catalog in 2005 compared to 2004 (90% vs. 76%), and...
- Despite the high value placed on online access, only 42% say they are likely to access the library online in the next six months.



Marketing Implications

- A shift from viewing libraries as simply “buildings full of books” toward “a place where I can borrow books” indicates a more benefit-oriented perception of libraries – a more personal connection. This is an important attitude shift which is needed to begin influencing behavior.
- The majority of people have Internet access, are aware that online access to libraries is available, and place high value on that service. However, one-third of patrons with internet access are connecting with the library online. At the same time, the top ranked item for increasing the value of libraries is more hours of operation – yet online access is always available.
 - This indicates continued opportunity to increase online access to libraries. Consider studying perceived barriers to becoming an online user, and addressing those in future marketing communications.
- Since people do not see themselves as very knowledgeable about the services that libraries offer, it is important to continue educating them about library offerings and benefits in order to increase usage.



Appendix

Library Visits and Usage
Perceptions and Attitudes
Demographics

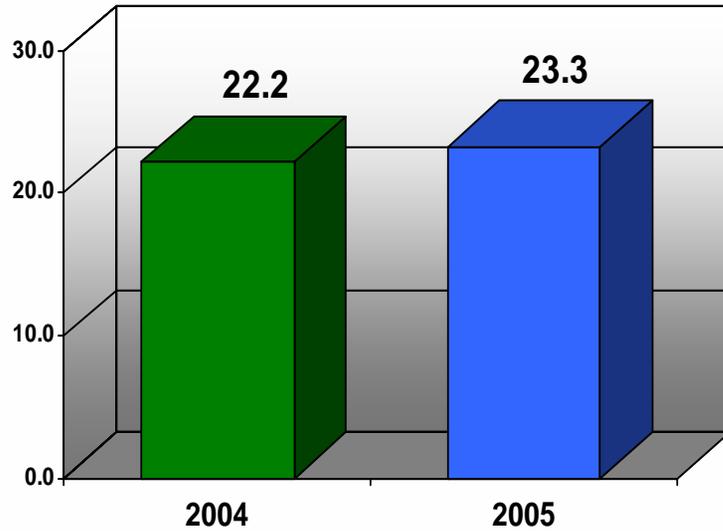


Library Visits and Usage (Behavior)



Consistent Visit Frequency and Service Usage

Average Library Visits/Year



Services Used During Visit

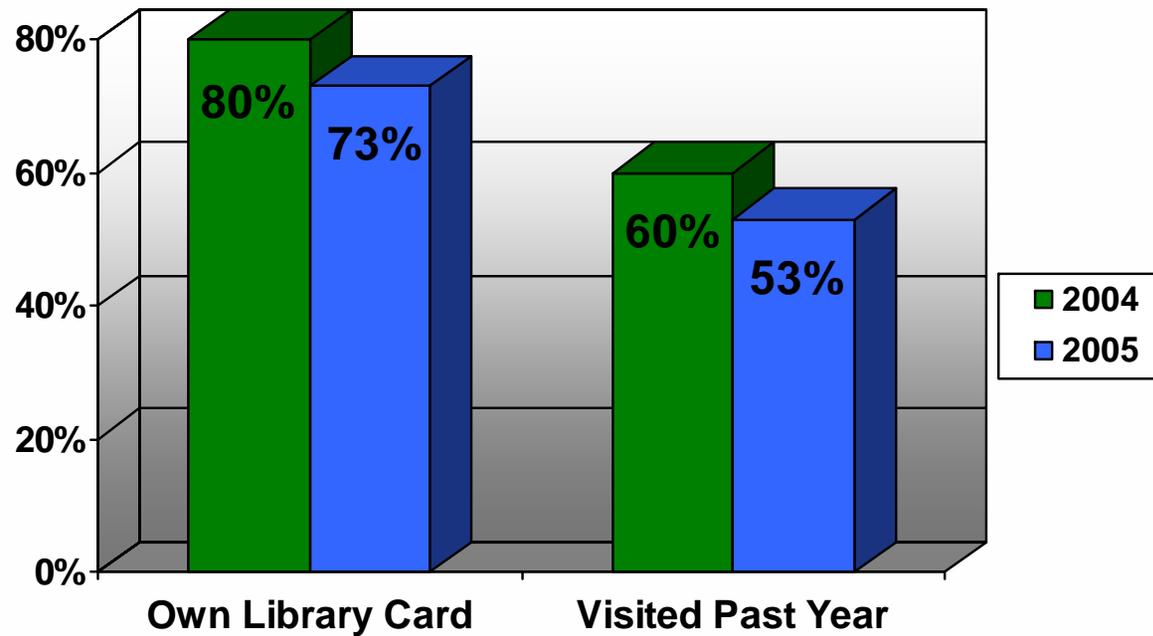
	<u>2004</u>	<u>2005</u>
Borrow books	89%	88%
Consult librarian	68	64
Borrow CDs, videos, software	52	50
Use reference materials	47	39
Read newspapers/mags	43	40
Connect to Internet	36	44
Children's activity/program	35	39
Attend program/event/workshop	25	23

Q4. How many times did you personally visit a library in the past year? Base: 120; 109 – those who visited

Q5. When you visited a library in the past year, which of the following services did you use? (AIDED) Base: 120; 109 – those who visited



Majority are Card Owners and Patrons

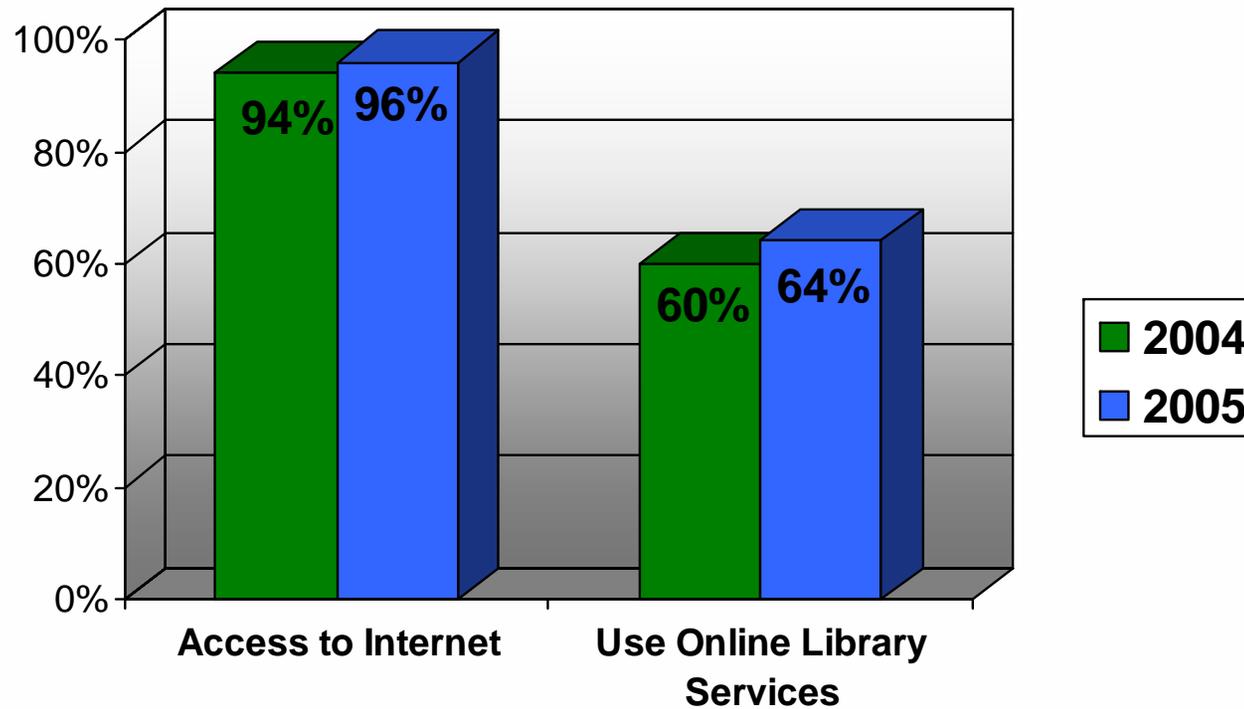


Q1. Do you own a library card? Base: 201; 205

Q3. Have you visited a library or used library services on the Internet in the past year? Base: 201; 205



Online Access – Opportunity for Growth



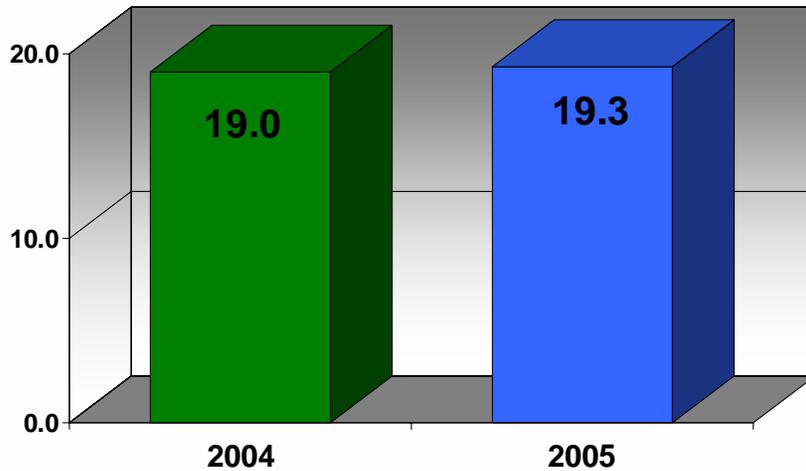
Q6. Do you have access to the Internet? Base: 120; 109 – those who visited

Q7. Have you used a computer to go online to use library services in the past year? Base: 113; 105 – has Internet access



Library Usage – Online Visits

Average Online Visits/Year



Services Used Online

	<u>2004</u>	<u>2005</u>
Used computer catalog	90%	76%*
Renewed books online	49	47
Used other webpage resources	44	36
Consulted librarian online	24	18
Reserved books/materials	7	3

***Statistically significant change**

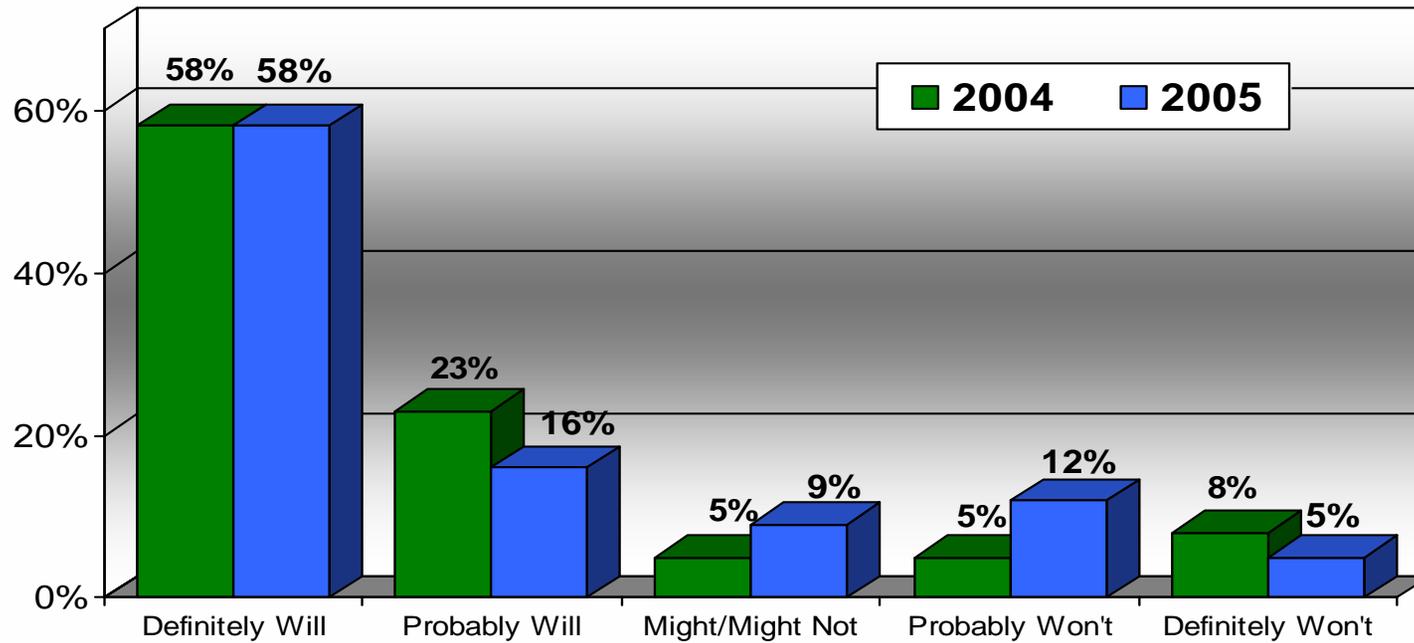
Q8. How many times have you accessed the library on the Internet in the past year? Base: 113; 105 – has Internet access

Q9. When you've gone online to use the library during the past year, which of the following services did you use? (AIDED) Base: 70; 67



General Population - Majority Intend to Visit

How likely are you to personally visit a library in the next 6 months?

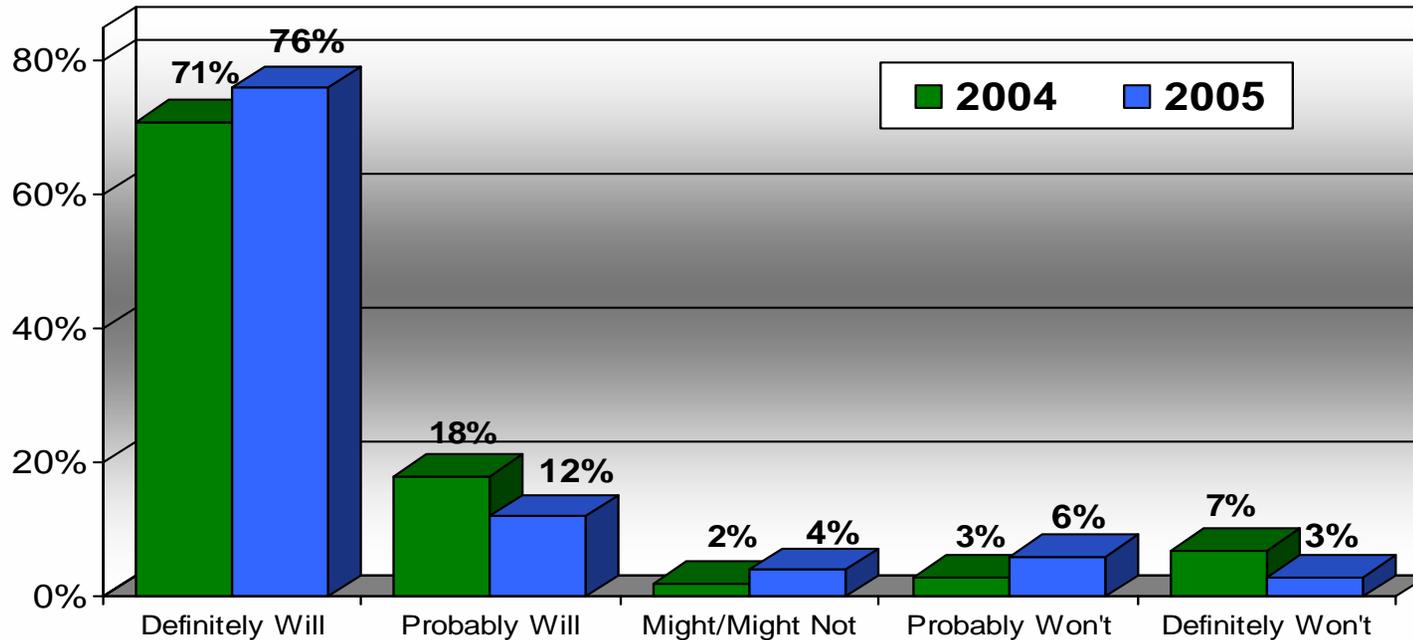


Q22. How likely are you to personally visit a library in the next six months? Would you say you... (AIDED) Base: 201; 205



Library Patrons - Higher Likelihood to Re-Visit

How likely are you to personally visit a library in the next 6 months?

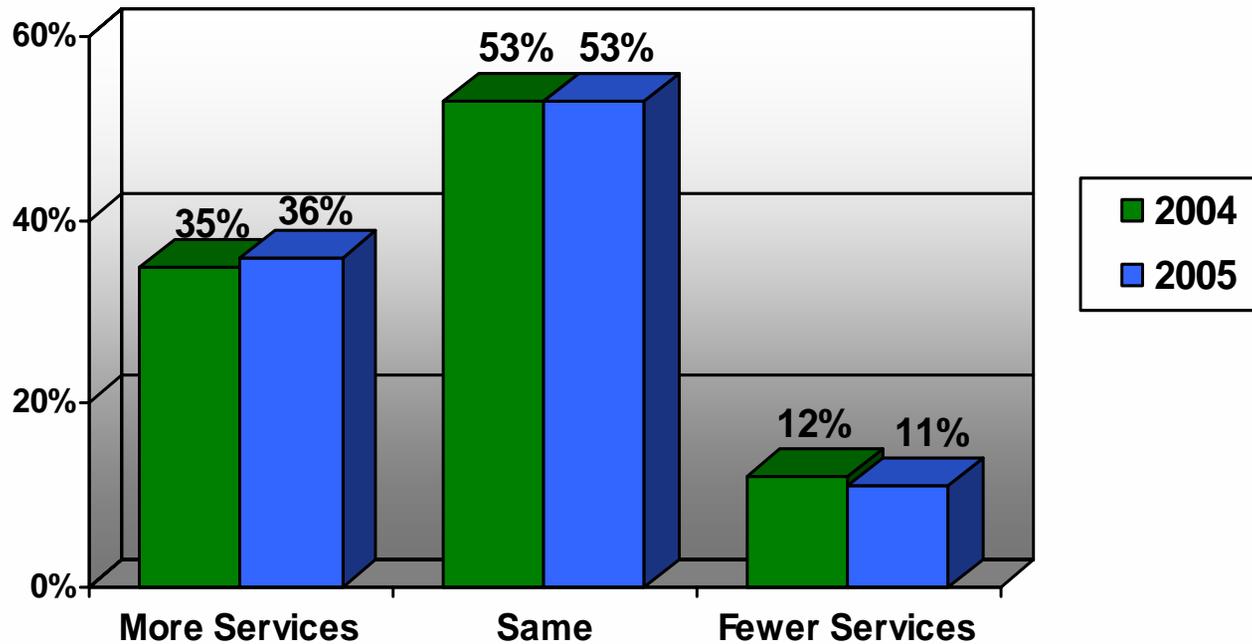


Q22. How likely are you to personally visit a library in the next six months? Would you say you... (AIDED) Base: 120; 109 library patrons



More Library Services Used vs. Past Year

Level of library services used this year vs. past year



Q10. Thinking about library services used this past year compared to the previous year, would you say you've used... More types of library services, the same number of library services, or fewer types of library services? Base: 120; 109 library patrons



Perceptions and Attitudes about Libraries



Library Perception - More Benefit Oriented

“Imagine that someone was totally unfamiliar with what a library is and does – how would you describe it to them?”

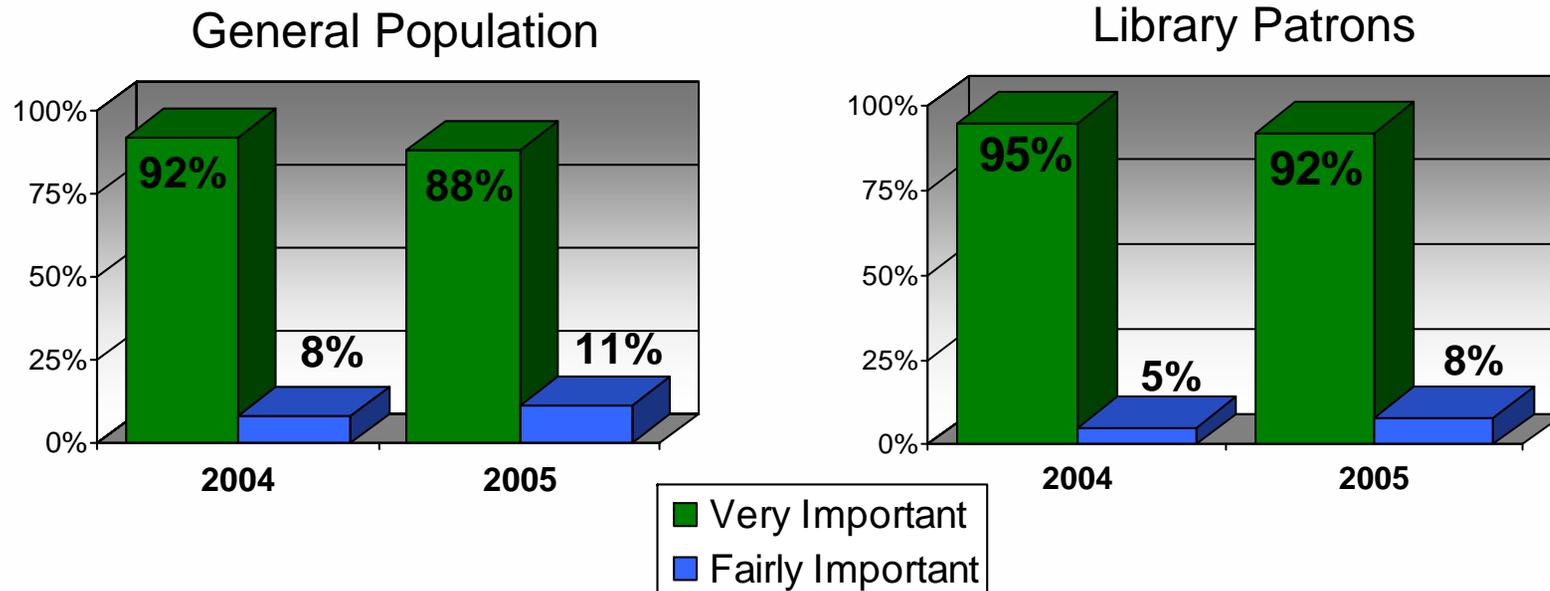
<u>DESCRIPTION of LIBRARY</u>	<u>2004</u>	<u>2005</u>
Place to get/borrow books	44%	52%
Resource center/get information	43	41
Building/place full of books	34	16*
Has computers/use Internet	23	18
Has videos/DVDs to borrow	16	13
Place to learn/educational/knowledge	15	18
Free to use	14	11
Good for children	9	8
Has music/CDs to borrow	8	8
*Statistically significant change		

Q2. Imagine that someone was totally unfamiliar with what a library is and does – they'd never heard of it. How would you describe the library to them? (UNAIDED) Base: 201; 205



Libraries are Important to All

How Important are libraries in our state?



Q13. Overall, how important are libraries in our state? Are they.. (AIDED)? Overall base: 201; 205; Library Patrons: 120; 109



Services Most Valuable to Community

<u>SERVICE</u>	<u>2004 AVERAGE RATING</u>	<u>2005 AVERAGE RATING</u>
Borrow books	4.7	4.6
Search for materials using computer catalog	4.3	4.2
Use of reference materials	4.3	4.3
Consult librarian at library	4.2	4.2
Children's activities or programs	4.2	4.2
Connect to the Internet	3.9	3.9
Renew book loans online	3.8	3.9

Q11. Thinking of the services that libraries provide, how valuable are they to the community? We'll use a rating scale of 1 to 5, where 1 means 'not at all valuable' and 5 means 'extremely valuable'. (AIDED) Base: 201; 205



Services Valued by Community, con't

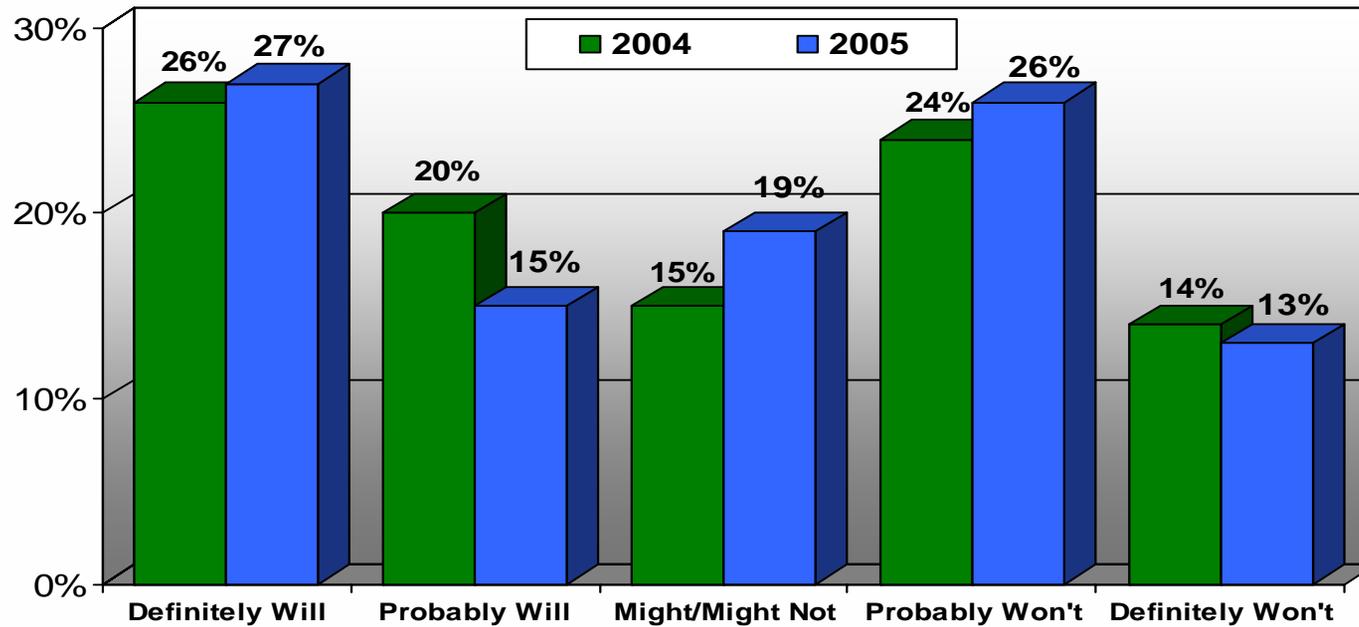
<u>SERVICE</u>	<u>2004 AVERAGE RATING</u>	<u>2005 AVERAGE RATING</u>
Borrow CDs, videos, or computer software	3.9	3.8
Consult librarian by phone or email	3.6	3.7
Use other resources on library webpage	3.6	3.7
Read newspapers/magazines	3.5	3.6
Hear a speaker or attend special program/event	3.4	3.5
Take a class or workshop	3.4	3.4

Q11. Thinking of the services that libraries provide, how valuable are they to the community? We'll use a rating scale of 1 to 5, where 1 means 'not at all valuable' and 5 means 'extremely valuable'. (AIDED) Base: 201; 205



Likelihood to Access Library Online Next 6 Months

How likely are you to access the library on the Internet?



Q23. How likely are you to access the library on the Internet in the next six months? Would you say you... (AIDED) Base: 201; 205



Access to Knowledge has Greatest Appeal

What is most appealing to you about libraries?

<u>MOST APPEALING</u>	<u>2004</u>	<u>2005</u>
Access to <u>information/knowledge</u>	45%	44%
Access to books/literature	32	38
A wide variety of resources	24	18
Free/affordable	19	16
Available to everyone/equality	10	11
An important community resource	6	7
Children's programs/child friendly	3	6
Atmosphere/quiet	3	5
Helps encourage reading	2	4

Q14. What is most appealing to you about libraries? (UNAIDED) Base: 201; 205



Least Appealing about Libraries: 1/3 Say “Nothing”

What do you like least about libraries?

<u>LEAST APPEALING</u>	<u>2004</u>	<u>2005</u>
Limited hours	15%	19%
Doesn't have what I need	7	5
Location/access/parking	5	6
Hard to find books/not user friendly	4	3
Just don't think of it	4	3
Uncensored Internet access	4	0
Homeless people	2	1
Too quiet	2	4
Other*	23	21
Nothing/Don't Know	35	37

* *Other' includes: crowded, not relevant to me, late fees, stuffy, under-funded, noisy, too few computers)*

Q15. What do you like least about libraries? (UNAIDED) Base: 201; 205



Making Libraries More Valuable

What would make libraries more valuable to you?

<u>FEATURES/SERVICES</u>	<u>2004</u>	<u>2005</u>
More open hours/hours of operation	17%	21%
Larger selection	17	11
Location closer to my home/more convenient	2	9
Nicer facilities	3	2
More children's programs	3	0
More/better parking	2	3
Easier to use	2	3
More services	2	3
Nothing/Don't Know	41	38

Q16. What would make the libraries more valuable to you? (UNAIDED) Base: 201; 205



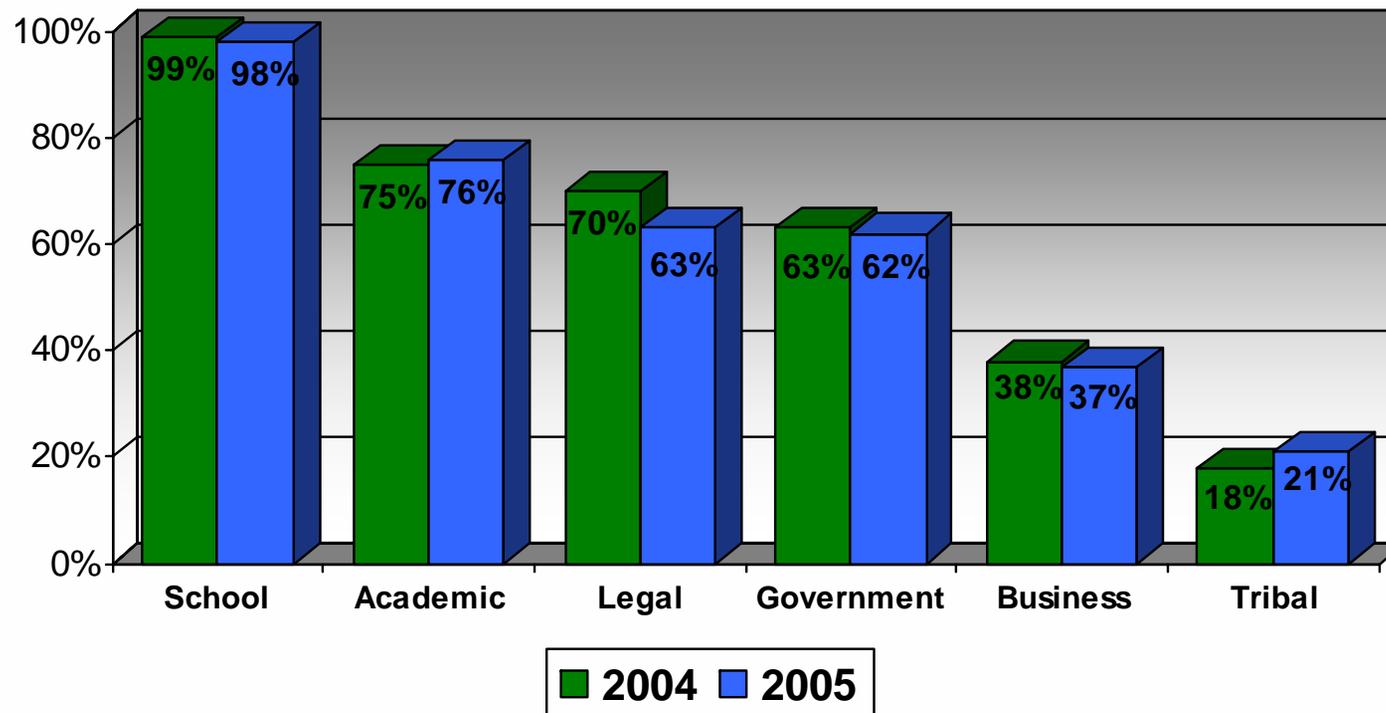
Library Characteristics Consistent

<u>CHARACTERISTIC</u>	<u>2004 DESCRIBES WELL/VERY WELL</u>	<u>2005 DESCRIBES WELL/VERY WELL</u>
Valuable	97%	94%
Free/affordable	96	95
Helpful	94	94
Something for everyone	93	94
Easy to use	87	84
Welcoming and friendly	83	86
Accessible	81	77
Comfortable	81	77
Safe	79	83
Up-to-date technology	79	74
Sense of community	78	80
An appealing environment	78	80
Convenient	75	70
Innovative and progressive	67	63
Fun	66	69
Entertaining	59	56

Q19 Please tell me how well each of the following characteristics describes libraries. We'll use a rating scale where 1 means 'it does not describe libraries at all' and 5 means 'it describes libraries very well.' (AIDED) Base: 201; 205



Awareness of Library Types

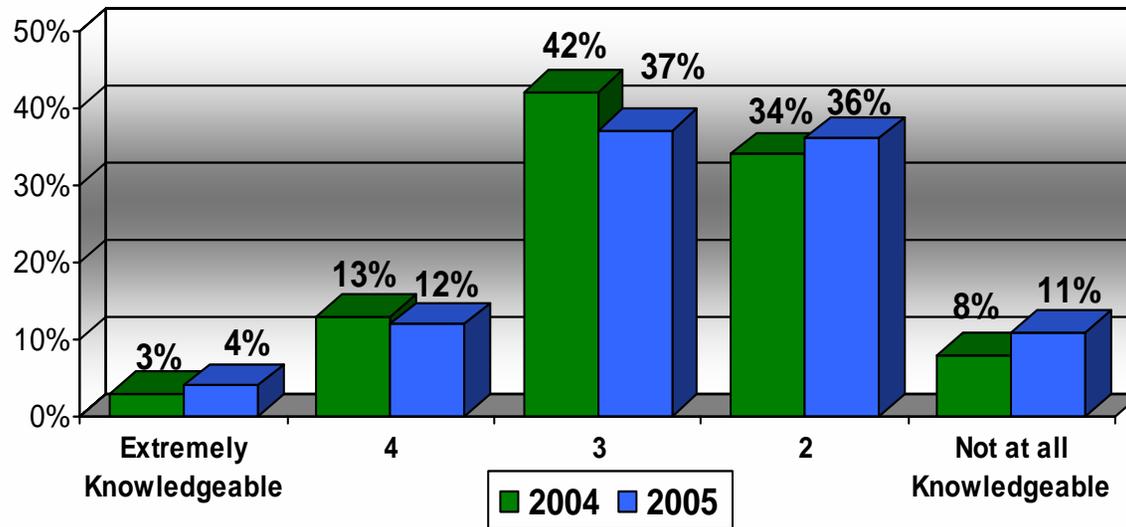


Q21. In addition to public libraries, what other types of libraries are you aware of? I will read a list, a please tell me whether you are aware of each one. (AIDED) Base: 201; 205

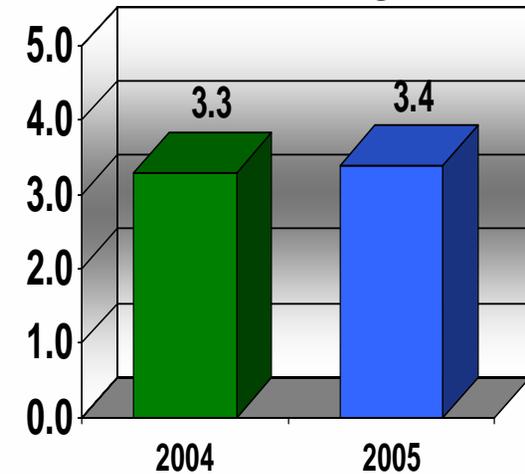


Continued Opportunity to Increase Knowledge about Library Services

How knowledgeable are you about available library services?



AVERAGE KNOWLEDGE RATING

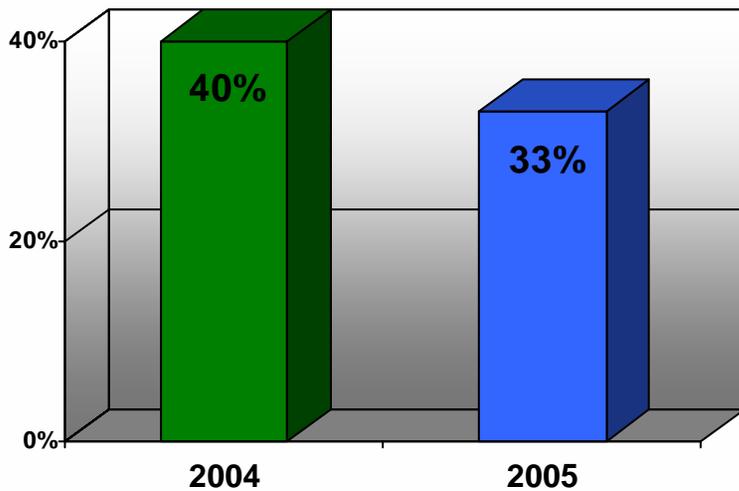


Q24. Overall, how knowledgeable do you feel you are about all the library services that are available? On a scale from 1 to 5, with 1 being 'not at all knowledgeable' and 5 being 'extremely knowledgeable', how would you rate your knowledge level about library services? Base: 201; 205



Advertising Awareness & Message Recall

AWARE OF ADVERTISING/PR



MESSAGES RECALLED

	<u>2004</u>	<u>2005</u>
■ New library/construction	41%	16%*
■ Programs/events/kids	12	28*
■ Libraries provide access to information/knowledge	7	10
■ Libraries help you learn	7	1
■ Levy/bond/budget issues	6	12
■ Hours	4	6
■ Libraries provide more than just books	2	1
■ Online services	2	1

***Statistically significant change**

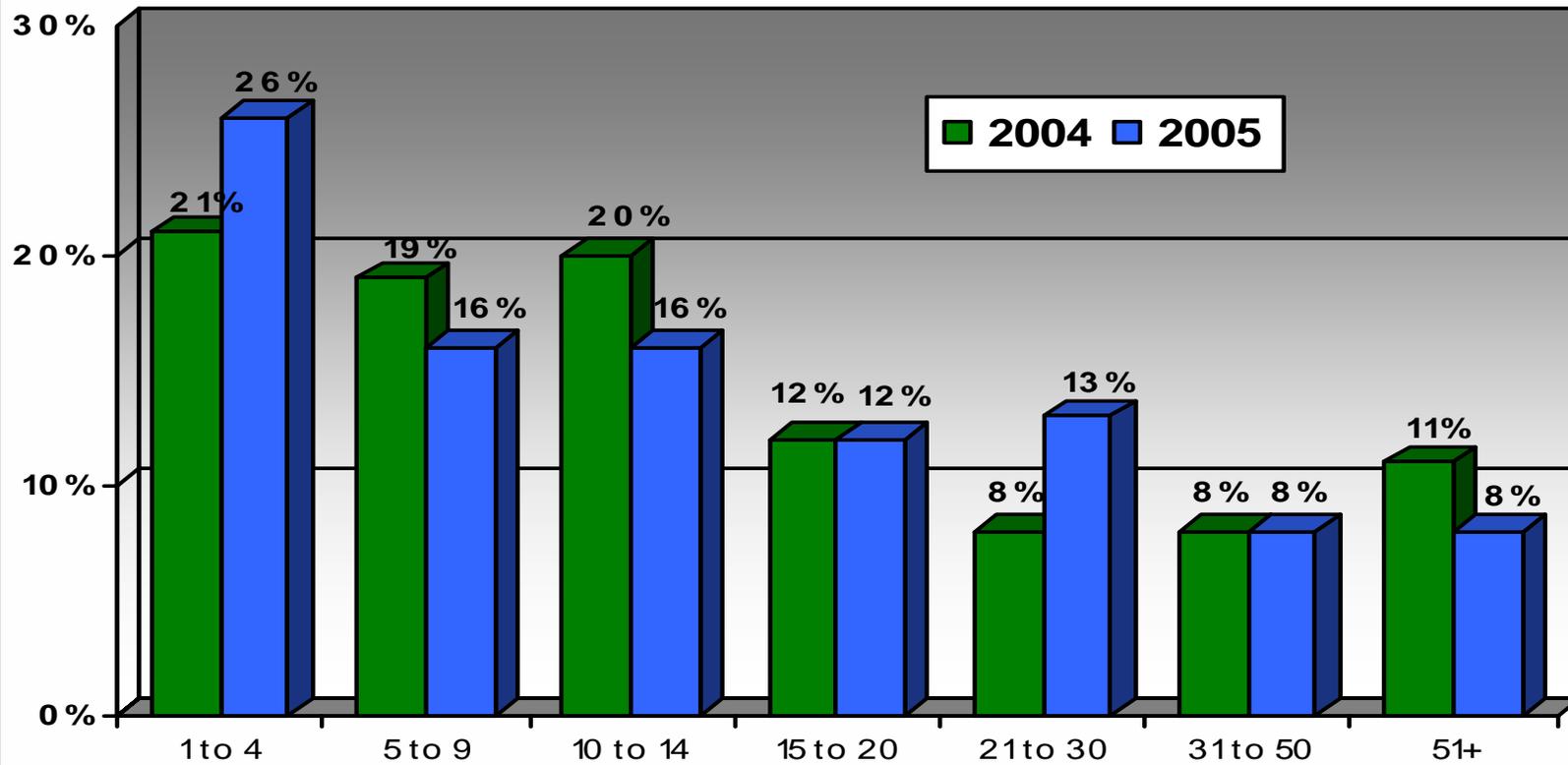
Q17. In the past 6 months, have you seen, heard or read any advertising or news articles about libraries? Base: 201; 205

Q18. What did the advertising say or show you? (UNAIDED) Base: 81; 67 aware of advertising



Library Usage – Personal Visits

Library Visits/Year

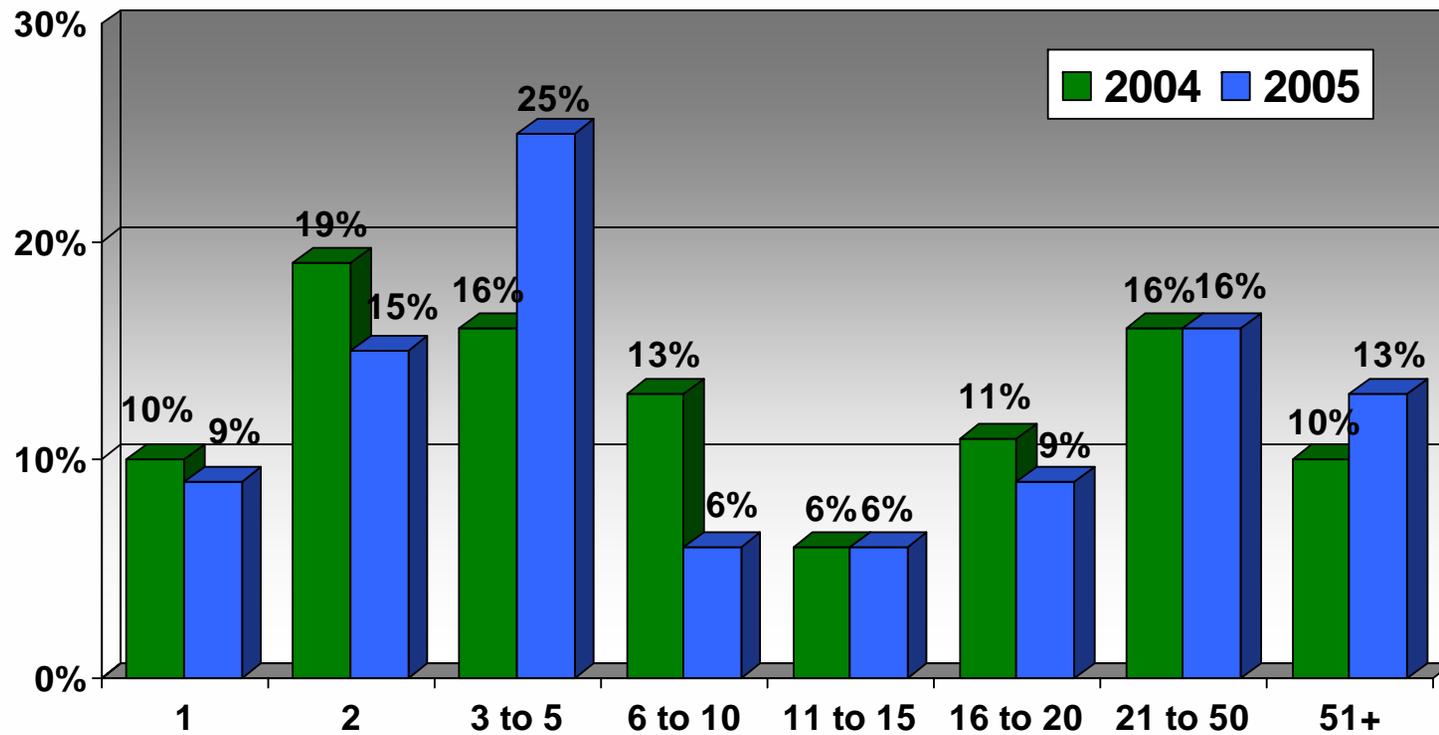


Q4. How many times did you personally visit a library in the past year? Base: 120; 109 – those who visited



Library Usage – Online Visits

Online Visits/Year



Q8. How many times have you accessed the library on the Internet in the past year? Base: 70; 67 – accessed library online



Demographics



Language and Employment

- There is a significantly lower number of respondents in 2005 who are “comfortable speaking English only.”

LANGUAGE

	<u>2004</u>	<u>2005</u>
I am comfortable speaking English only	97%	87%
I prefer speaking a combination of English and some other language	3	12
I prefer speaking in some other language	0	0

OCCUPATION

Full time	59%	59%
Part time	13	14
Not employed outside the household	28	26

Q25 Which of the following best describes your current employment? (AIDED) Base: 201; 205

Q28: Which of the following statements applies to you the most? (AIDED) Base 201; 205



Education

	<u>2004</u>	<u>2005</u>
Some high school or less	3%	2%
High school graduate or equivalent	12	11
Vocational, business or technical school	12	10
Some college/associates degree	30	28
College graduate/bachelors degree	27	31
Postgraduate work/degree	15	18

Q26. Which of the following best describes your level of education to date? (AIDED) Base: 201; 205



Annual Household Income; Gender

<u>HH INCOME</u>	<u>2004</u>	<u>2005</u>
Under \$20,000	6%	8%
\$20,000 - \$34,999	11	10
\$35,000 - \$49,999	17	14
\$50,000 - \$74,999	20	22
\$75,000 - \$99,999	17	19
\$100,000 or more	12	14
Don't Know/Refused	16	13
<u>GENDER</u>		
Female	60%	61%
Male	40	39

Q27. For classification purposes only, which of the following categories best describes your household's total, combined income in 2003?
(AIDED) Base: 201; 205



Age

RESPONDENT

	<u>2004</u>	<u>2005</u>
25 – 34 years	32%	28%
35 – 44	39	40
45 – 54	23	26
55 – 64	6	6

CHILDREN IN HOUSEHOLD

Under 5 years	38%	38%
5 – 9	37	40
10 – 14	46	38
15 – 18	32	38

S4. We need to talk with people from a variety of different ages. Which of the following categories best describes your age? AIDED)
Base: 201; 205

S5. What are the ages of the children living at home? Base: 201; 205

