# The Next Library and the People Who Will Use It

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# My points:
# The New Library is built around 5 insights

1. Where libraries currently stand in the public eye

2. Who patrons are and what they want

3. How technology is changing flows of information

4. Where new needs are surfacing in communities

5. How the concept of the "library" can change to meet new realities

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http://bit.ly/1w5YIE7

**The big reasons your foundation is solid**

# 1) Libraries are appreciated



**91% say libraries are <u>important to their communities</u>**

**76% say libraries are <u>important to them and their families</u>**

Robert Dawson photography -  Library Road Trip
http://www.robertdawson.com/pages/1/Public%20Library%3a%20An%20American%20Commons/Public%20Library%3a%20An%20American%20Commons/

# If your local public library CLOSED, would that have a MAJOR impact, MINOR impact or NO IMPACT on …

- major impact
- minor impact
- no impact

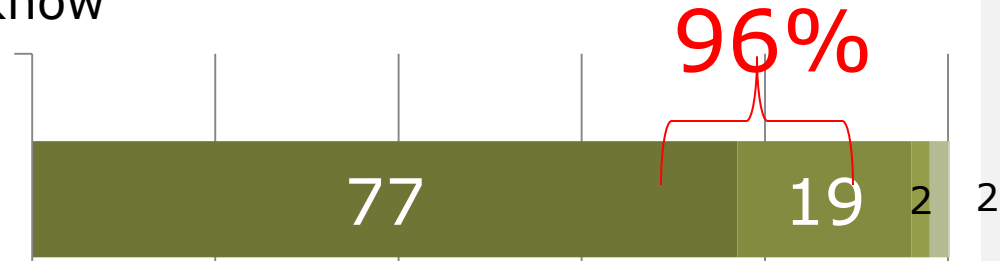| | major impact | minor impact | no impact |
|---|---|---|---|
| Your community as a whole | 63 | 27 | 7 |
| You and your family | 29 | 38 | 32 |
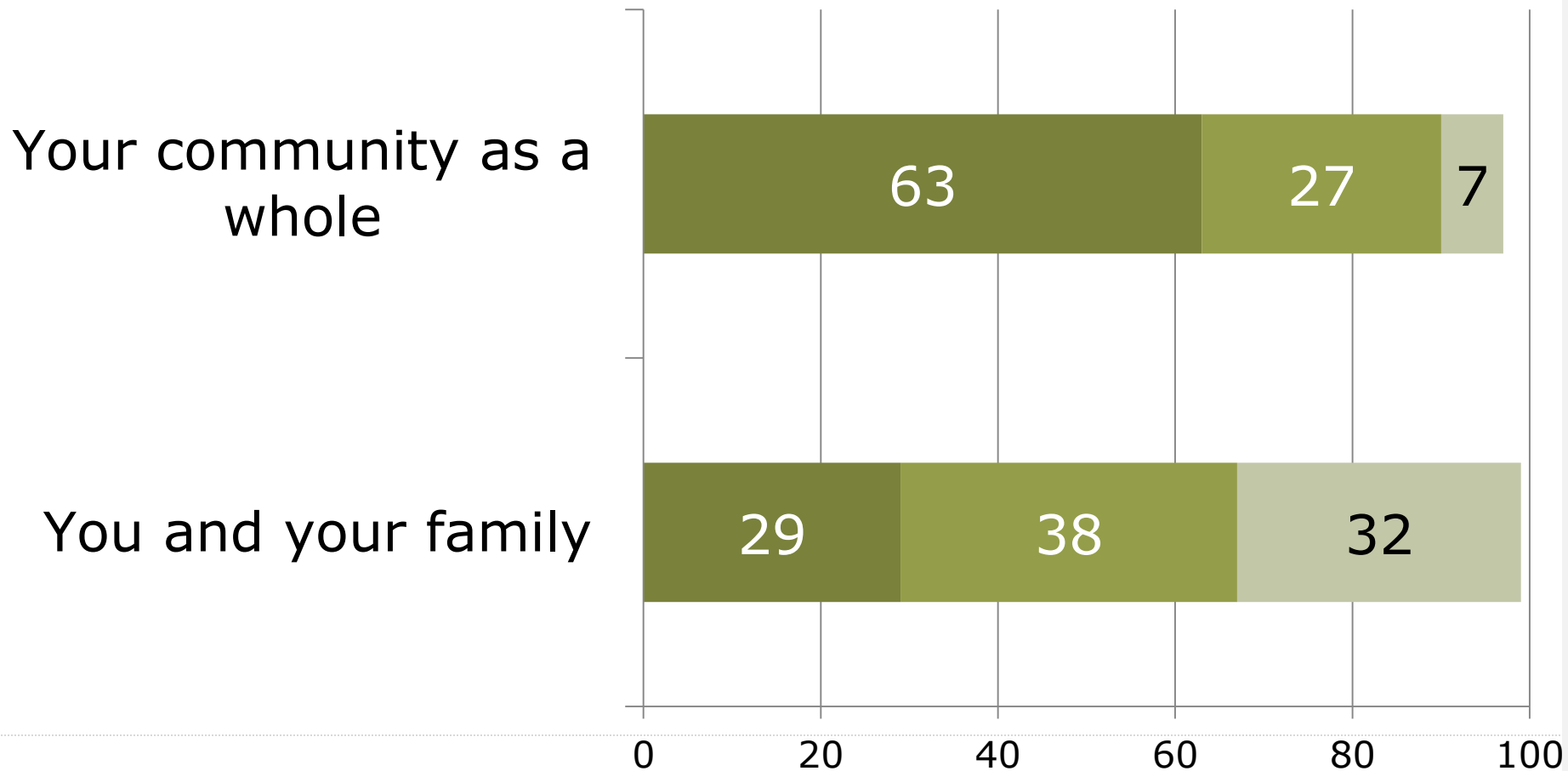
# Agree / disagree questions

**Legend:**
- Strongly agree
- somewhat agree
- Somewhat Disagree
- Strongly Disagree
- don't know

**Public libraries are important because they promote literacy and a love of reading.** — 96%
77 | 19 | 2 | 2

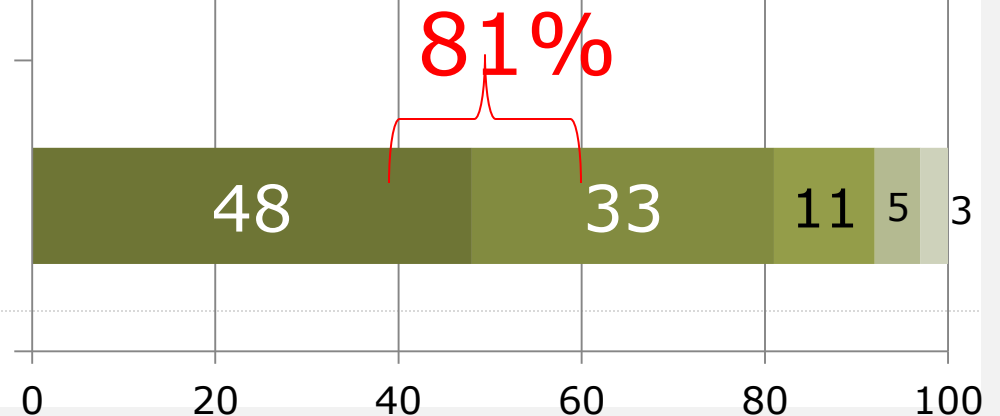**Because it provides free access to materials and resources, the public library plays an important role in giving everyone a…** — 96%
72 | 24 | 2 | 2

**Having a public library improves the quality of life in a community.** — 93%
69 | 24 | 3 | 2 | 1
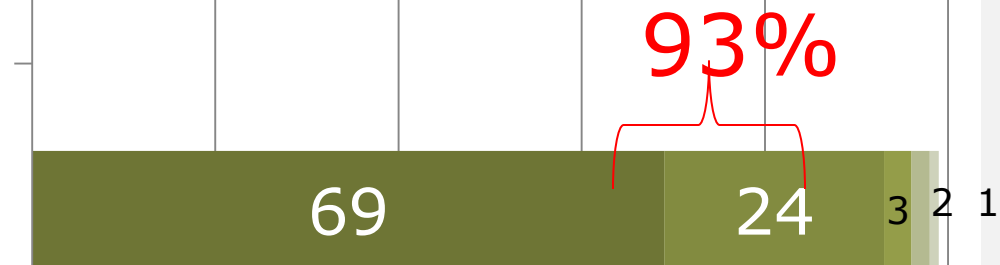
**Public libraries provide many services people would have a hard time finding elsewhere.** — 81%
48 | 33 | 11 | 5 | 3

Axis: 0  20  40  60  80  100
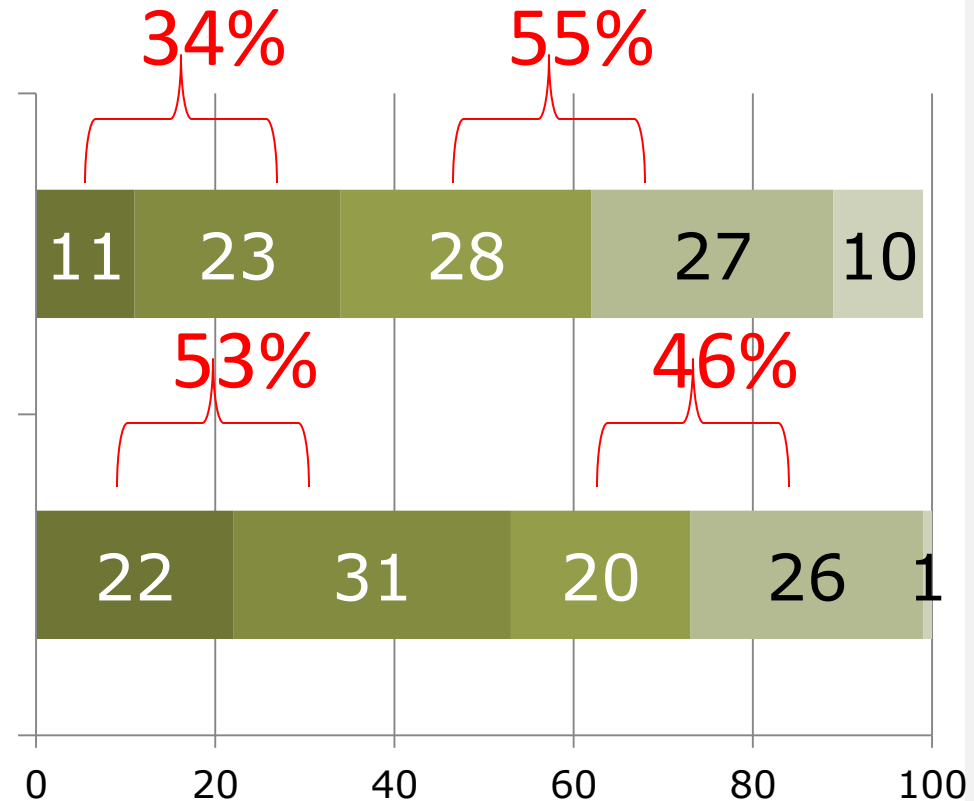
# 2) Libraries stack up well vs. others

June 5-8, 2014

**How confident?**  **How important?**

■ % Great deal  ■ % Quite a lot  ← 63 →  ← 28 →

**Library to community**

| Institution | % Great deal | % Quite a lot |
|---|---|---|
| The military | 39 | 35 |
| Small business | 29 | 33 |
| The police | 25 | 28 |
| The church or organized religion | 25 | 20 |
| The medical system | 17 | 17 |
| The U.S. Supreme Court | 12 | 18 |
| The presidency | 14 | 15 |
| The public schools | 12 | 14 |
| Banks | 10 | 16 |
| The criminal justice system | 10 | 13 |
| Newspapers | 12 | 10 |
| Organized labor | 10 | 12 |
| Big business | 9 | 12 |
| News on the Internet | 8 | 11 |
| Television news | 10 | 8 |
| Congress | | |

12

# 3) People like librarians



**98% of "ever" library visitors say interactions are "very positive"**

**81% of library visitors say librarians are "very helpful"**

**50% of "last year" visitors got help from a librarian**

# 4) Libraries have rebranded themselves as tech hubs



80% of Americans say <u>borrowing books</u> is a "very important" service libraries provide

80% say <u>reference librarians</u> are a "very important" service

<span style="color:red">77% say <u>free access to computers and the internet</u> is a "very important" service</span>

76% say <u>quiet study spaces</u> are a "very important" service

# Warning sign: The Marvin Gaye question

- **22%** say that they know <u>all or most </u>of the services their libraries offer

- **46%** say they know <u>some</u> of what their libraries offer

- **31%** said they <u>know not much or nothing at all </u>of what their libraries offer

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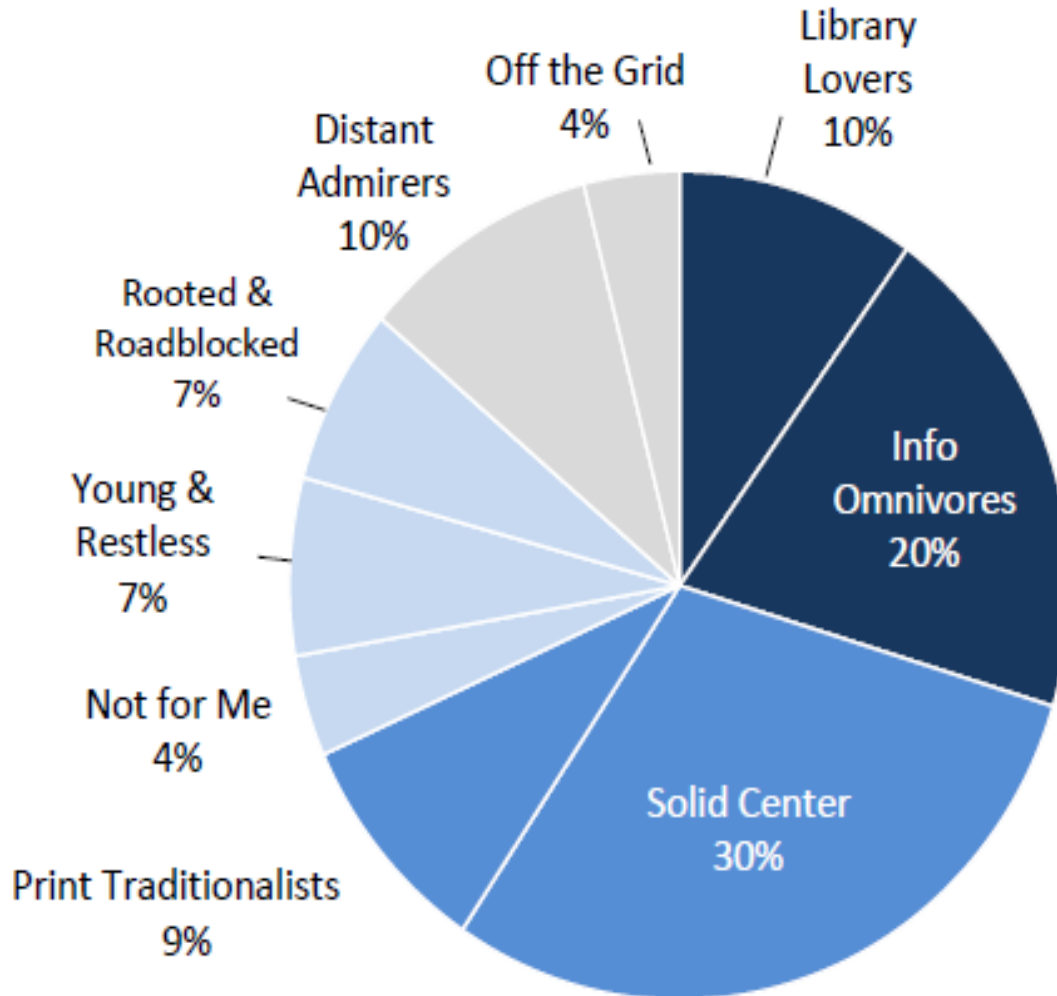5. How the concept of the "library" can change to meet new realities

# Library users

| | | % who have visited a library or bookmobile in person in the past 12 months |
|---|---|:---:|
| **All Americans ages 16+** | | **48%** |
| a | Men | 45% |
| b | Women | **50%** |
| **Age** | | |
| a | 16-17 | 59%[bcd] |
| b | 18-29 | 48%[e] |
| c | 30-49 | 52%[de] |
| d | 50-64 | 46%[e] |
| e | 65+ | **39%** |
| **Education attainment** | | |
| a | No high school diploma | 34% |
| b | High school grad | 39%[a] |
| c | Some College | **51%** |
| d | College + | **58%** |
| **Parent of minor** | | |
| a | Parent | **55%** |
| b | Non-parent | 44% |

# Who uses library websites

| | | % who have ever used a library website <u>in the past 12 months</u> |
|---|---|---|
| **All Americans ages 16+** | | **30%** |
| a | Men | 26% |
| b | Women | **34%** |
| **Age** | | |
| a | 16-17 | 35%[de] |
| b | 18-29 | 36%[de] |
| c | 30-49 | 35%[de] |
| d | 50-64 | 28%[e] |
| e | 65+ | **17%** |
| **Education attainment** | | |
| a | No high school diploma | 10% |
| b | High school grad | 20%[a] |
| c | Some College | **34%** |
| d | College + | **45%** |
| **Parent of minor** | | |
| a | Parent | **37%** |
| b | Non-parent | 27% |

Off the Grid 4%

Library Lovers 10%

Distant Admirers 10%

Rooted & Roadblocked 7%

Young & Restless 7%

Not for Me 4%

Print Traditionalists 9%

Info Omnivores 20%

Solid Center 30%

**By level of engagement with public libraries:***

High Engagement (30%)

Medium Engagement (39%)

Low Engagement (17%)

No personal library use (14%)

http://www.pewinternet.org/2014/03/13/library-engagement-typology/

# Library Typology

## What kind of library user are you?

Are you a "Library Lover"? An "Information Omnivore"? Or are you totally "Off the

**You can also use this quiz to gather information for your own library or community group.**

This quiz is a condensed version of the questions asked in our nationally representative survey of 6,224 Americans ages 16 and older in September 2013. You can learn more about the findings from that survey in the full library engagement typology report.

http://bit.ly/1hA8auT

Begin Quiz →

# Tier 1: High Engagement
## 30% of population

# Library Lovers – 10%

**Overview: Strikingly positive views of public libraries; use libraries and library websites more than any other group; believe libraries are essential at the personal & community level.**

☐ **Who they are: Younger, women (62%); highest proportion of parents (40%). High education level, but face economic challenges: 23% have recently lost their jobs or seen a significant loss of income; 25% are currently looking for a job. Students. Liberal and Democratic.**

☐ **Lifestyle: Heavy book readers (66% read a book daily). Generally prefer to borrow books instead of purchasing them; but high share visit bookstores (57%). Enjoy learning, tracking down information. Active socially and engaged with community events, and rate their communities highly. Big tech users.**

☐ **Relationship with libraries: 87% visited the library in the last 12 months, most of them visiting weekly. And 75% say that the local library closed it would have a major impact on them personally, significantly more than any other group.**

# Information Omnivores – 20%

Overview: Heavy info seekers/users. Highest tech use levels. Think libraries have a vital role in their communities. But not nearly as likely to say the loss of the local library would have a major impact on them and their family.

☐ Who they are: Highest socio-economic group: 35% live in households earning $75,000+. High employment and education.  Women (57%); parents (40%). One of the more urban groups. Politically they are more likely to be Democratic and liberal.

☐ Lifestyle: 90% go online every day, and 81% use social media; (46%) have a tablet computer; 68% own a smartphone. Read average of 17 books in the previous 12 months—more likely to buy their books than borrow them.

☐ Relationship with libraries: 85% strongly agree that libraries are important because they promote literacy, and 78% strongly agree that libraries improve the quality of life in their communities; 77% say the loss of the library would be a major blow to their community.

# Tier 2: Medium Engagement
## 39% of population

# Solid Center – 30%

**Overview: Generally track with the general U.S. population—in demographics; tech use, patronage of libraries, book reading, approach to information, and their views about the importance and role of libraries.**

☐ **Who they are: Tilts a bit male. Median age is 47. Small towns and cities, and half have lived in their communities for longer than 10 years. Less likely than high engagement groups to include parents (28%).**

☐ **Lifestyle: They rank high among the groups in appreciating their communities: 84% would describe their communities as good/excellent. Fairly active in communities.**

☐ **Relationship with libraries: 43% visited the library in the past 12 months; only 5% used a library website in the past year. They rate libraries highly as community resources: 67% say that libraries improve the quality of life in a community and 61% say their library's closing would have a major impact on their community.**

# Print Traditionalists – 9%

Overview: Tend to value the traditional services libraries perform. They are also in one of the higher ranking groups in expressing appreciation for the role of libraries in communities. Live farther from libraries.

☐ Who they are:  Highest proportions of rural (61%), white (75%), and Southern (50%) respondents. 57% women. About half ended their education with a high school diploma. Political views lean conservative.

☐ Lifestyle: Lived long in their communities; know the names of neighbors; they also tend to have positive feelings about where they live; 81% say they socialize with friends or family every day or almost every day. Use technology less than other higher engagement groups.

☐ Relationship with libraries: Stand out in their positive views about the role of libraries in communities. Say that if the local library closed it would have a major impact on the community.

# Tier 3: Low Engagement
## 18% of population

# Not for Me - 4%

**Overview:  Most used public libraries at some point in their lives, though few have done so recently. Their portrait suggests a level of alienation and they have strikingly less positive about role of libraries in communities. Know little of libraries.**

☐ **Who they are: Tilts male (56%); members are more likely to have lower levels of educational attainment; less likely to be married (41%), and are a little less likely to be parents (26%). Just 39% are employed full-time, and almost a quarter (23%) are retired.**

☐ **Lifestyle: 31% read did not read any books last year; lower levels of tech adoption. More likely than others to report having difficulty getting info about such things as politics and current events, community activities, health information, and career opportunities.**

☐ **Relationship with libraries: Relative to other groups, they are more likely to say they find libraries hard to navigate; 64% say library closings would have *no* impact on them or their family, and just 20% strongly agree that having a public library improves the quality of life in a community.**

# **Young and Restless – 7%**

**Overview: Most are relatively new to their communities. This may be why only 15% of its members say they even know where the local library is. Only a third have a library card or visited a library in the past year. However, they have positive views of libraries overall.**

☐ **Who they are: Median age is 33. Highly urban. Many live in lower-income households; large share are students, or are looking for jobs. Much more racially diverse group. Tilt liberal.**

☐ **Lifestyle: Heavily involved with technology; 82% access internet with mobile device. When it comes to reading, they are fairly average: read an average of 11 books in the past 12 months, and a median of 5.**

☐ **Relationship with libraries: Their use of libraries declined in past 5 years, but they their views about the importance of libraries are generally positive: 71% agree that libraries promote literacy, and 61% agree libraries improve the quality of life in a community.**

# Rooted and Roadblocked – 7%

**Overview: They are longtime residents of their communities, but may face many potential hurdles in their lives: 35% are retired, 27% are living with a disability, and 34% have experienced a major illness (either their own or loved one) within the past year. Still, most likely to say that the closing of the local library would have a major impact on the community (61% say that).**

☐ **Who they are: Median age 58. Most retirees. Whites. Somewhat poorer.**

☐ **Lifestyle: Longtime residents of their communities, but less engaged with certain community life. Lower tech-used levels.**

☐ **Relationship with libraries: This group stands apart from the Not for Me group in its relatively positive views about the role of libraries in communities: 78% agree that libraries are important because they promote literacy and reading; 75% say libraries improve the quality of life in a community; and 72% say libraries give everyone a chance to succeed.**

**No personal library use:**
**14% of population**

# Distant Admirers – 10%

**Overview: Many say others in their house use libraries, and quite a few indicate that they indirectly rely on various library services. They have very high opinions about importance and role of libraries in communities.**

☐ **Who they are: Largest share of Hispanics (27%); 56% are male. Relatively lower levels of education and household income.**

☐ **Lifestyle: Less likely than some of the other groups to know many neighbors; lower levels in community cultural events. Lower tech adoption. Few are heavy book readers or news consumers. 40% report someone else in HH is library user.**

☐ **Relationship with libraries: 68% say libraries are important because they promote literacy and reading; 66% say public libraries play an important role in giving everyone a chance to succeed; 64% say libraries improve the quality of life in a community. 55% say the loss of the local library would be a blow to the community.**

# Off the Grid – 4%

**Overview: Disconnected in many ways—not only from libraries, but also from their neighbors/communities, from technology, and from information sources. Many do not regularly read books or stay current with the news. Lowest tech profile.**

☐ **Who they are: High proportions of men (57%), older respondents (the median age 52), and Hispanic respondents (19%), and many tend to live in lower-income households and have lower levels of education. Small towns / rural.**

☐ **Lifestyle: Longtime residents of their communities, but 38% say they don't know the names of anyone who lives close by. Lowe community engagement. Half read no books in the previous 12 months.**

☐ **Relationship with libraries: They have the least positive views about libraries. Only 45% strongly agree that public libraries play an important role in giving everyone a chance to succeed by providing access to materials and resources vs. 72% of the general population.**
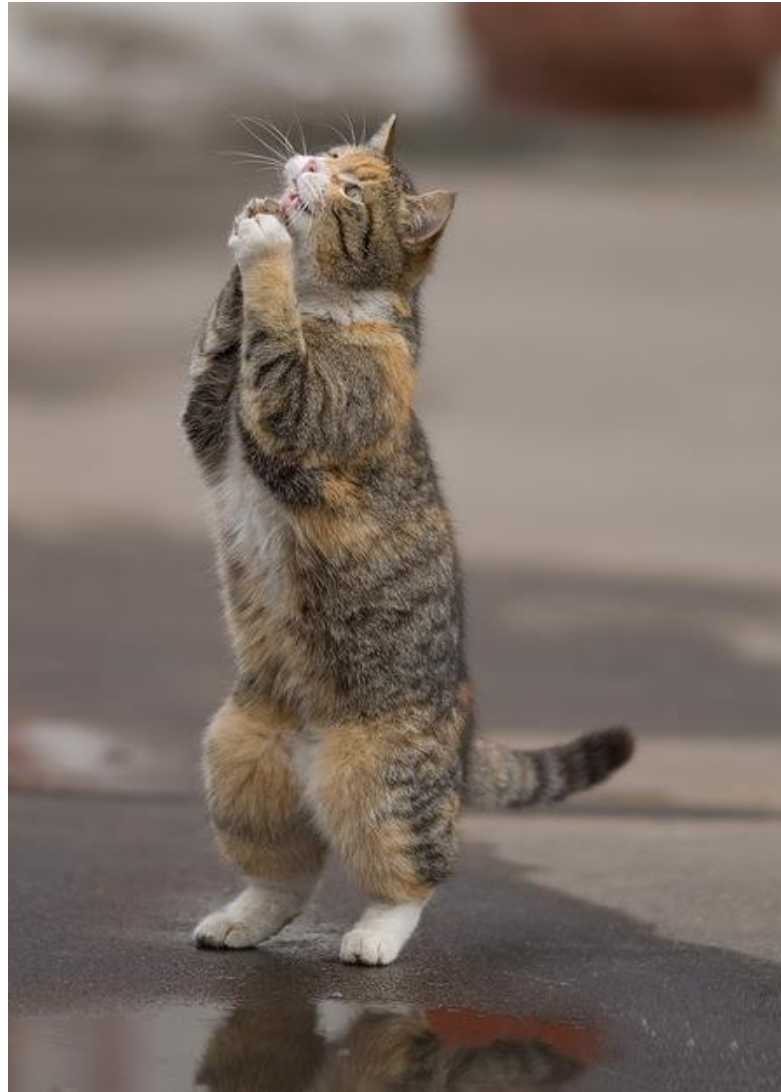
What they want <u>you to do</u>

## *Coordinate more closely with local schools in providing resources to kids*

| 85% | 11% | 2% |

## *Offer free early literacy programs to help young children prepare for school*

| 82% | 14% | 3% |

0%   20%   40%   60%   80%   100%

**Should definitely do** | **Should maybe do** | **Should definitely not do**

## *Separate spaces for different services*

| 61% | 27% | 9% |

## *More comfortable spaces for reading, working, relaxing*

| 59% | 28% | 9% |

## *Offer a broader selection of e-books*

| 53% | 30% | 5% |

0%    20%    40%    60%    80%    100%

**Offer more interactive learning experiences similar to museums**

| 47% | 38% | 12% |

**Help users digitize material such as family photos / historical documents**

| 43% | 39% | 14% |

**Move most library services online so users can access them without having to visit library**

| 42% | 34% | 19% |

**Make most services automated, so people can find what they need and check out material on their own without help from staff**

| 41% | 36% | 20% |

0%    20%    40%    60%    80%    100%

# Move some print books and stacks out of public locations to **<u>free up more space</u>** for things such as tech centers, reading rooms, meetings rooms, and cultural events

■ Should definitely do   ■ Should maybe do   ■ Should definitely not do

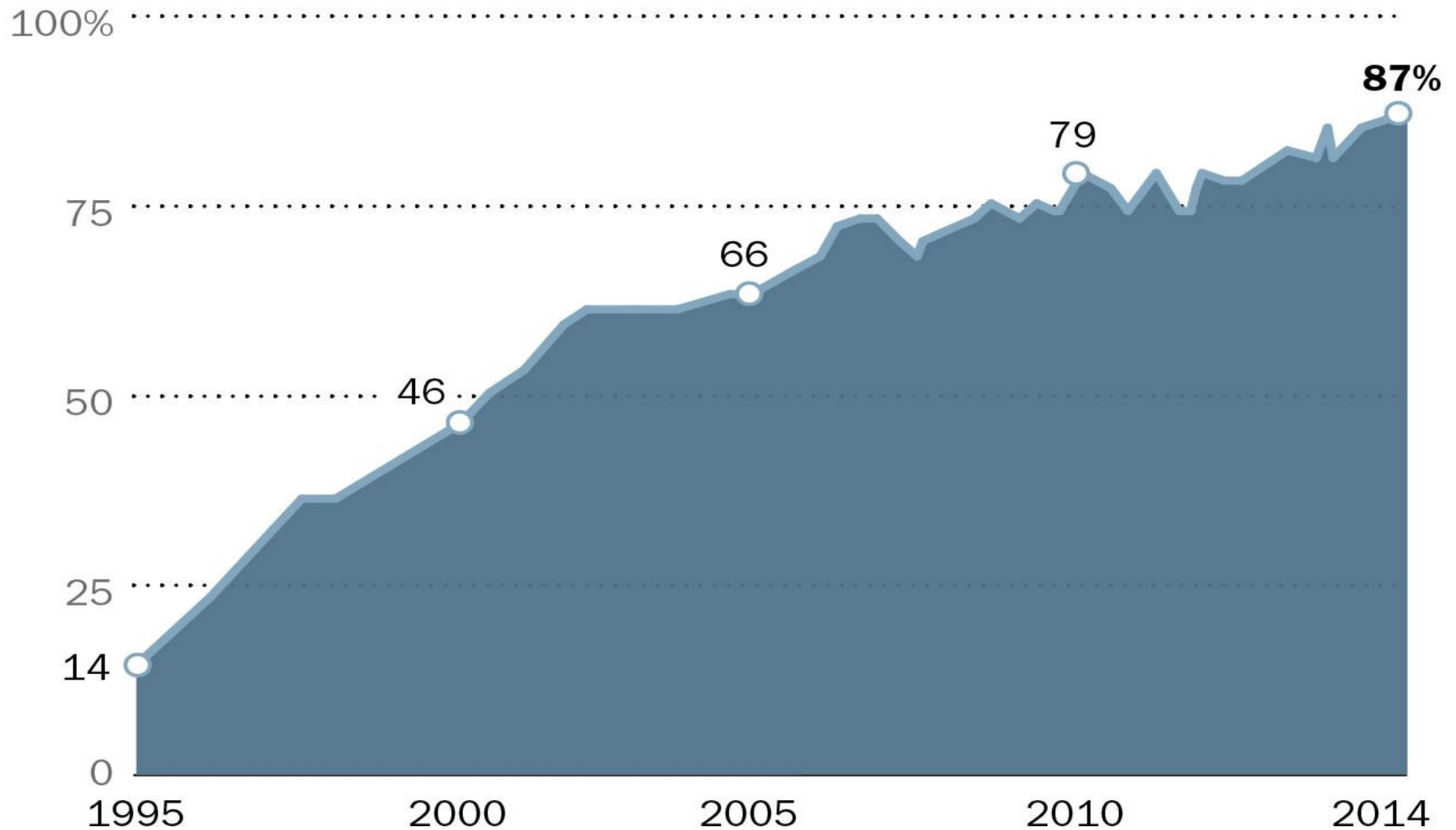| 20% | 39% | 36% |
|---|---|---|
| Less active library users, men, Af-Amer, Latinos, teens, less education, lower income HH, no computer | 18-29 yr olds, smartphone owners, know less about libraries, whites | Internet users, more active / knowledgeable patrons, whites, those over 50, higher income HH, full time workers, parents of tweens, computer owners, heavier book readers (including e-book readers) |

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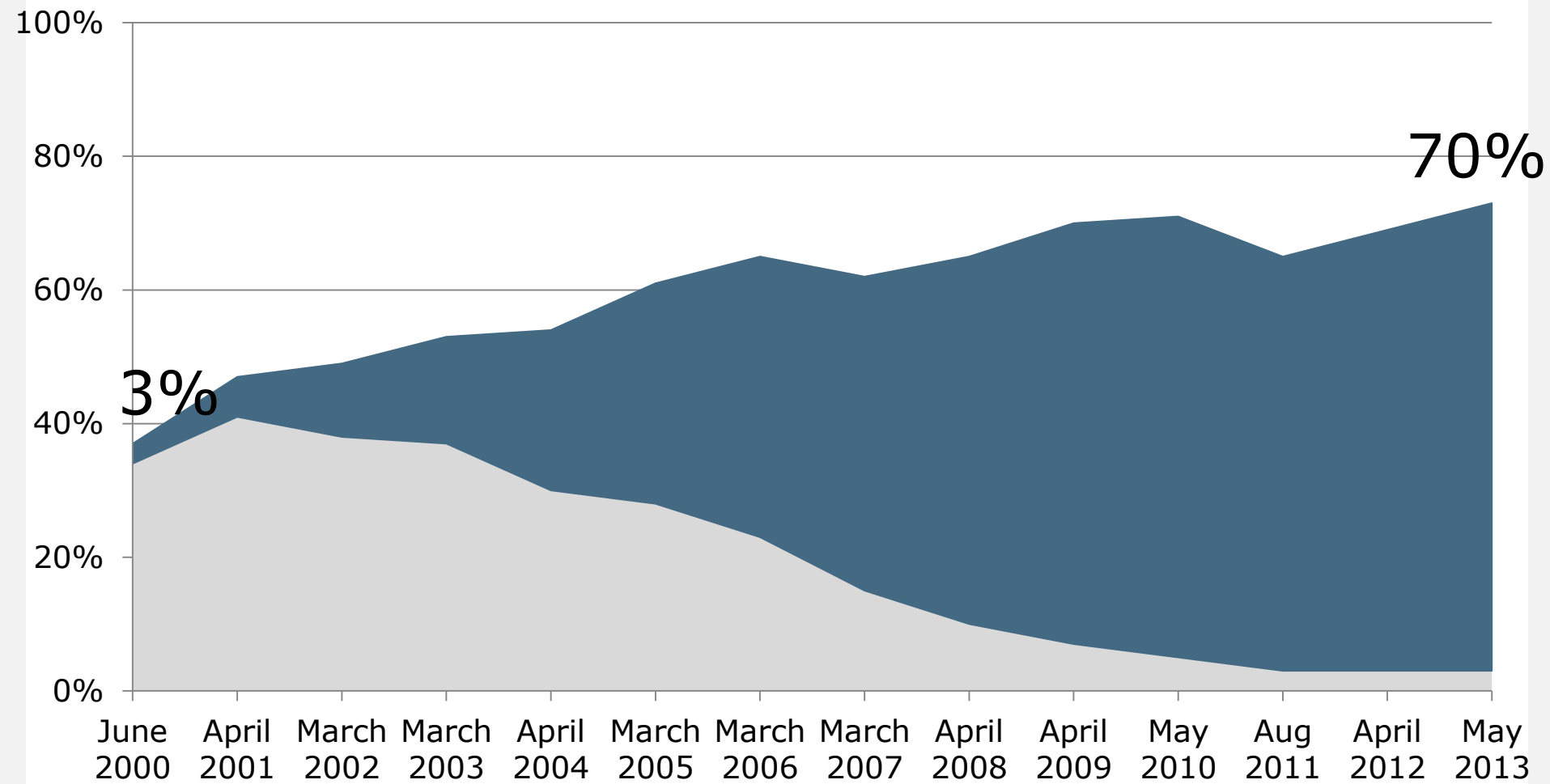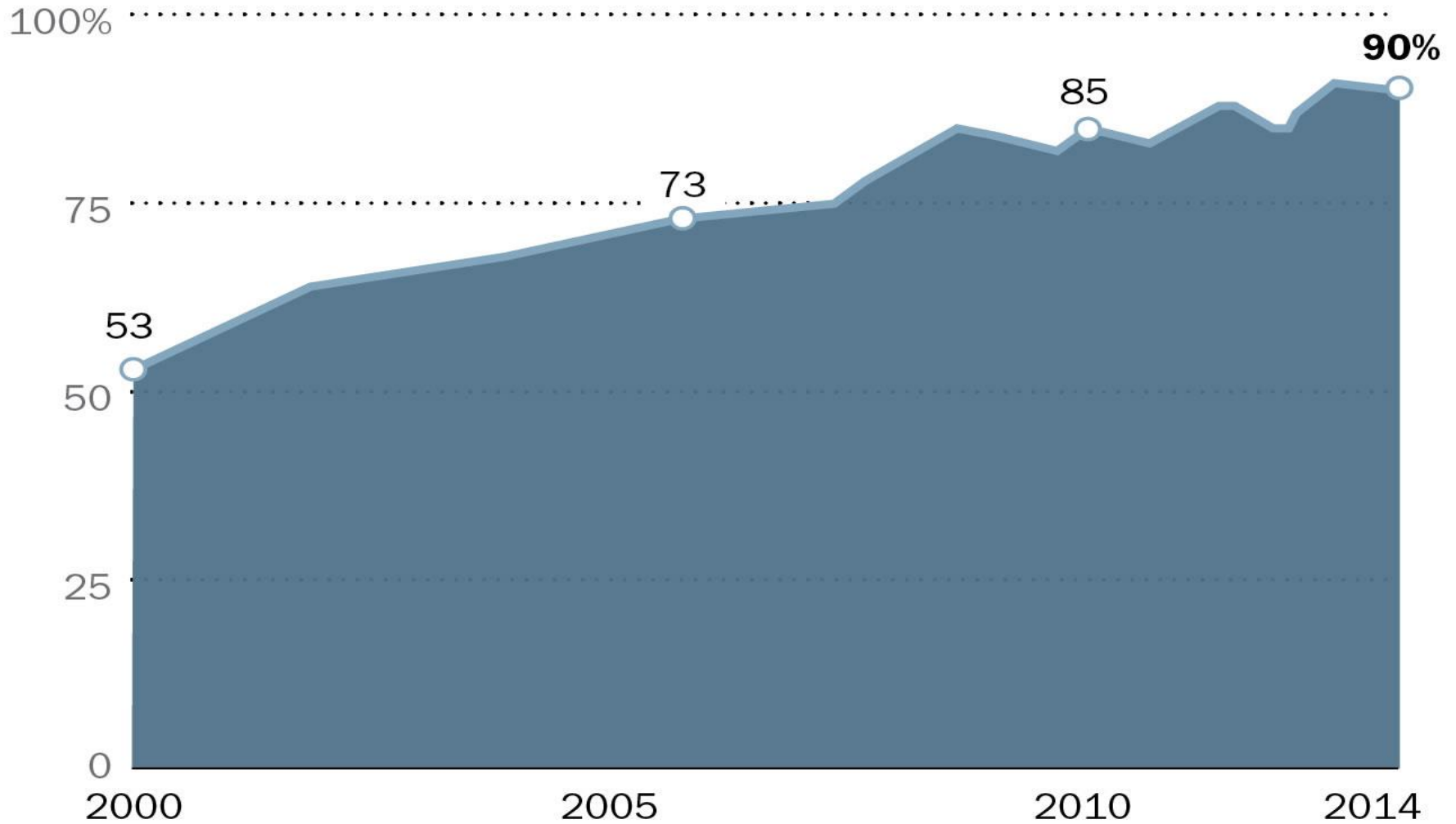
# First: Internet – 1995-2014



100%

87%

79

75

66

50        46

25

14

0
1995        2000        2005        2010        2014

http://bit.ly/1dE8jFV

First: Broadband – 2000-2013

Dial-up    Broadband

http://bit.ly/N8OznH
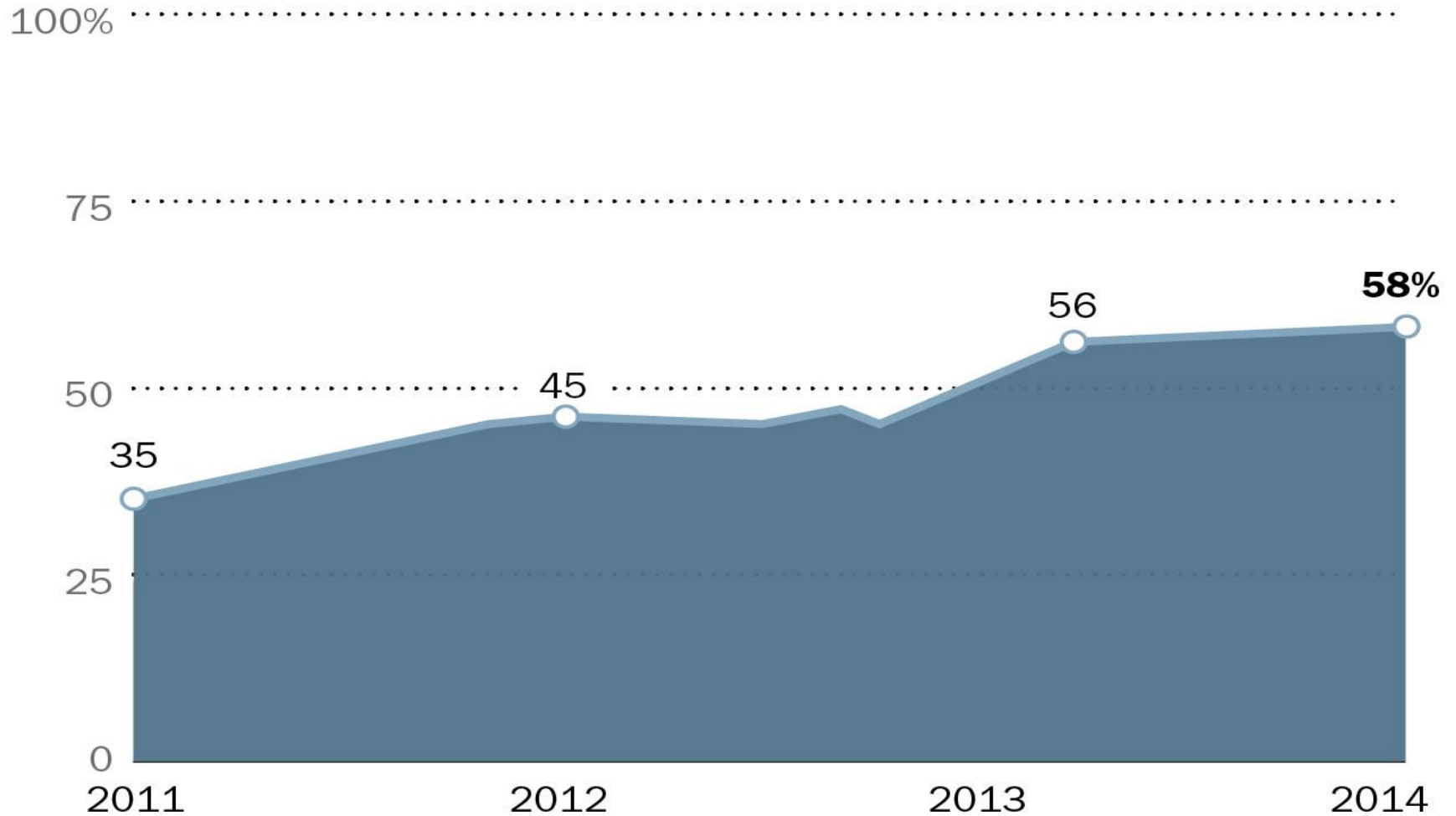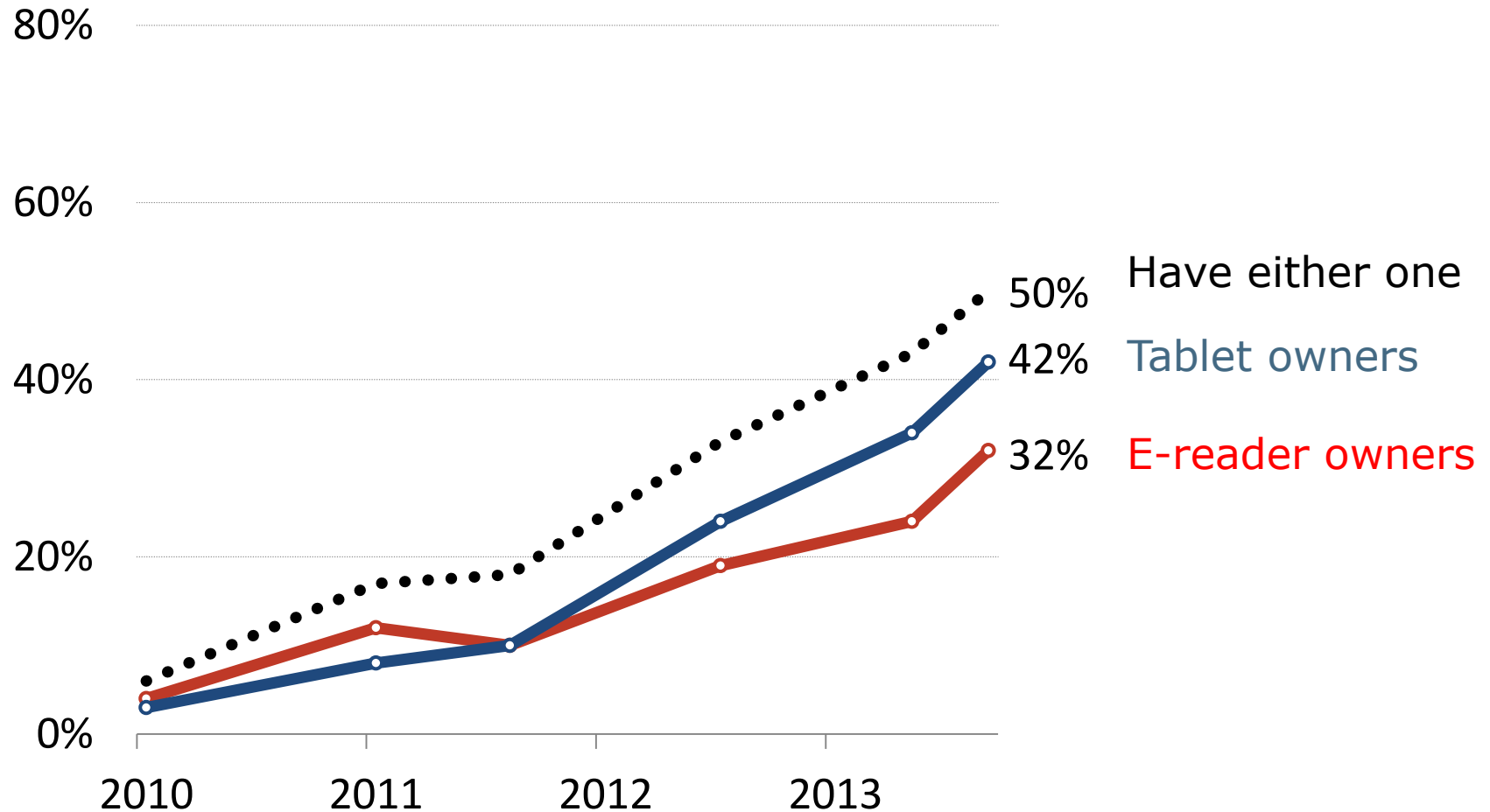
# Second: Mobile connectivity – Cell phones

# Second: Mobile connectivity - Smartphones

# Second: Mobile connectivity – Tablets



Have either one — 50%

Tablet owners — 42%

E-reader owners — 32%

# Third: Social networking/media - 61% of all adults



**% of internet users**

Legend: 18-29, 30-49, 50-64, 65+

Data labels: 89%, 78%, 60%, 43%, 9%, 7%, 6%, 1%

X-axis: 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013

Y-axis: 0%, 20%, 40%, 60%, 80%, 100%
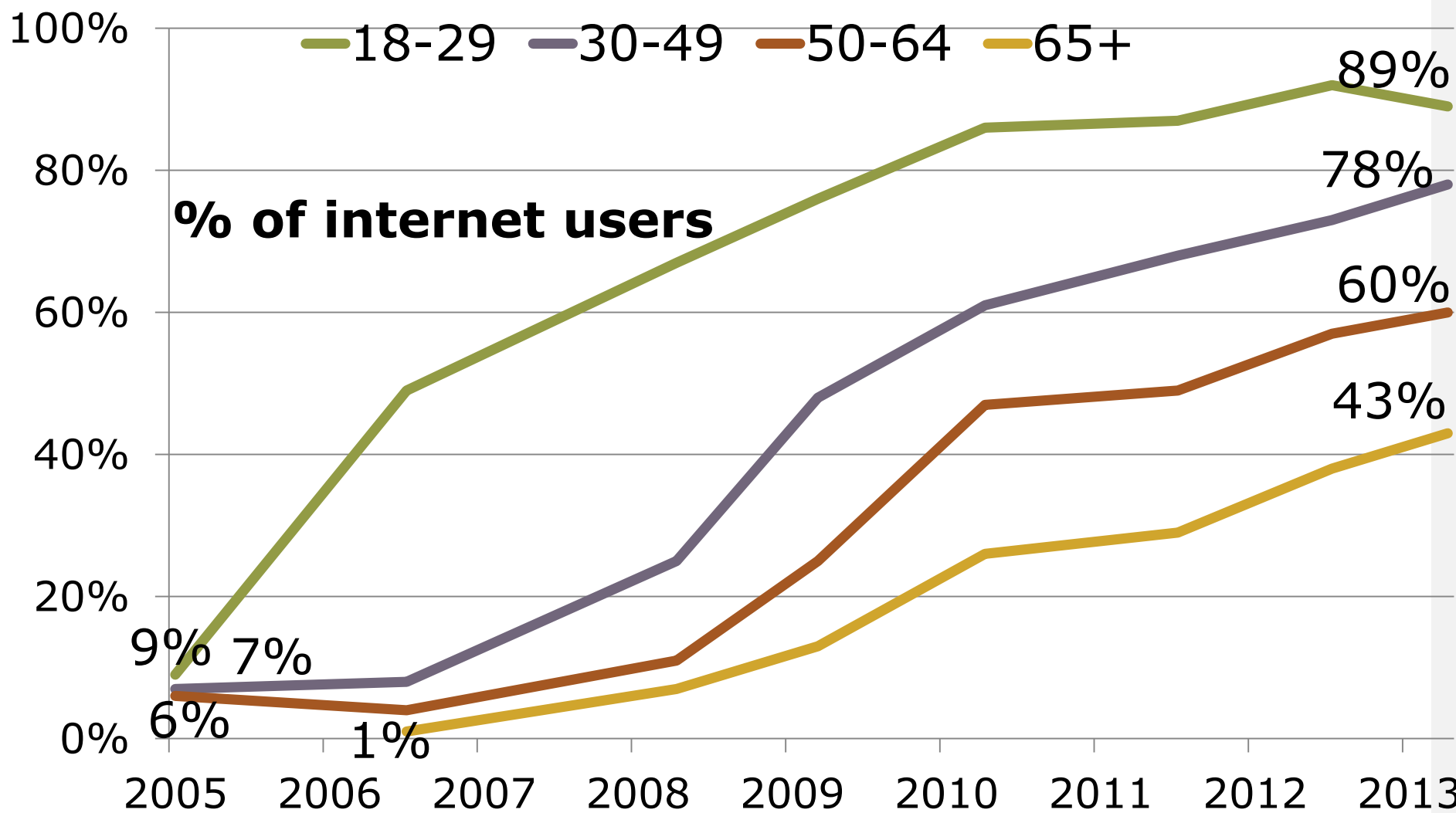
# Impact on networked individuals
# Information is networked "third skin"



Pervasively generated

Pervasively consumed

Personal via new filters

Participatory / spreadable

Replicable

Linked

Linked

Continually edited

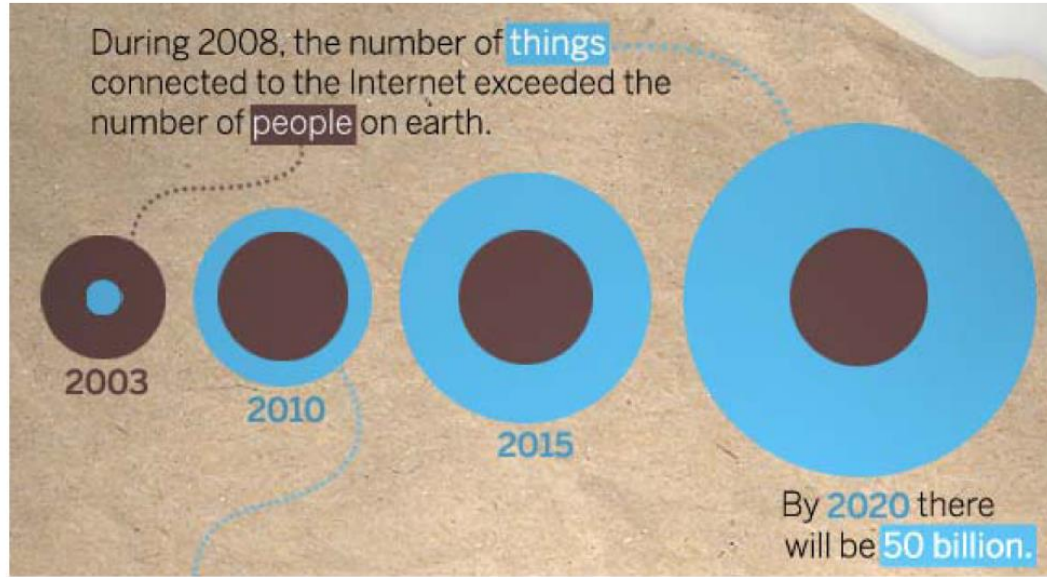Real-time / just-in-time

Timeless / searchable

Here (location) / nowhere

Given meaning via networks and
   algorithms and analytics

The Internet will become 'like electricity' — less visible, yet more deeply embedded in people's lives for good and ill

# The Internet of Things Will Thrive by 2025



During 2008, the number of **things** connected to the Internet exceeded the number of **people** on earth.

2003
2010
2015

By **2020** there will be **50 billion.**

It's the next revolution. <u>Upsides:</u> enhanced health, convenience, productivity, safety, and vastly more useful information. <u>Downsides:</u> privacy challenges, over-hyped expectations, tech complexity, lagging human adaptation to new realities.

# Reading is alive and well

**81%** of those ages 16 and older read a book in the previous year, including **28%** who read an <u>e-book</u>

**13** is the mean/average number of books read in past 12 months and median/midpoint is **5**

**24** is mean/average for e-book readers

**30%** of e-content consumers are reading more now because e-content is available on new devices -- **41%** for tablet owners

**8%** of those 16+ have borrowed an e-book from a library – and they are book buyers, too!

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# Examples of market and cultural shortcomings librarians could address (and are addressing)

1) Technology non-users - skills training in new literacies
2) Pre-school programs
3) After school activities
4) English as a second language courses
5) Lifelong learning opportunities / credentialing for mastery of competencies
6) Fill gaps in local media ecosystem – community and civic information/curation
7) Help for small business / entrepreneurs / non-profits
8) Agents of serendipitous discovery

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# People: Serve and Learn

Tech experts

Master teachers in age of lifelong learning

Visionaries for the knowledge economy and the jobs it produces

Experts in sense-making and context

Curators of the most relevant and useful material

Monitors of algorithms

Modelers of lifelong learning and value upgrading

# Place: Reconfigured and Repurposed



Physical space is different and sensored / metered

Artifacts are connected and data-rich artifacts

Nodes for "system of systems" with databases and media

Test beds – maker masters

Community information and media stewards – server farms

# Platform: Community Resource



Trusted institution and privacy watchdog

Advocates for free and open

Advocates for closing digital divides

Data and collections repositories

Entrepreneur enablers

Civic specialists and gap fillers – especially in learning realms

Credentialing???

Be not
afraid