



**THE ECONOMIC
CONTRIBUTION
OF
WISCONSIN PUBLIC
LIBRARIES TO THE
ECONOMY OF WISCONSIN**



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The conclusions and opinions in this paper are those of the authors of this study. The authors accept full responsibility for any errors or omissions that may appear in this report.

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EXECUTIVE SUMMARY

Wisconsin public libraries contribute to the Wisconsin economy and are of growing importance to the citizens of the state. The total economic contribution of Wisconsin public libraries to the Wisconsin economy is \$753,699,545. The return on investment in library services is \$4.06 for each dollar of taxpayer investment.

Wisconsin public libraries serve a total state population of over 5.6 million people and the use of public libraries by citizens of the state is growing. In the past ten years, library visits have grown by 28% and other key measures such as circulation of library materials, attendance at children's programs, computer access, and electronic access to library catalogs have also shown healthy growth.

Surveys of library users and focus groups conducted for this study show that public libraries play an important role in the quality of life in a wide range of communities. Libraries provide free access to information and technology and level the playing field for many low income people.

The results of this study are similar to the conclusions drawn from studies done in Indiana, Ohio, Florida and several other states.

Direct Economic Contribution

The direct economic contribution made by public libraries to the Wisconsin economy is over \$326 million. This economic contribution comes from spending by staff, spending on library operations and construction, and spending by visitors. The table below summarizes the economic contribution that comes from spending.

Direct Economic Contribution **Fiscal Year 2006**

Contributor	State Economy
Library Operations	\$ 114,618,459
Staff Spending	197,404,830
Visitor Spending	14,604,543
Total Contribution	\$ 326,627,832

Job Generation

The money that public libraries spend on payroll, benefits, construction, operating costs and services generates Wisconsin jobs in four ways: the direct staff jobs at public libraries, jobs generated by non-payroll library expenditures, jobs that result from people that serve the public library workforce in their professional and private lives, and jobs generated by visitor spending. Public libraries directly employ 3,222.42 full time employees. An additional 3,058 jobs are created indirectly. Wisconsin public libraries are responsible for the creation of a total of 6,280 jobs in the state.

Income and Sales Tax Revenue Generation

The income from jobs created by Wisconsin public libraries generates income and spending, which are taxed through personal income and sales taxes. The total regional income, sales, and property tax revenue generated by public library economic activity in the state totaled almost \$24 million in 2006.

The Market Value of Public Library Services

This study takes a market value approach to determine the economic value of public library services. The value of each type of library service to a library user is measured in terms of what it would cost users to buy the same services in an open marketplace.

The total economic value of those library services covered in the statistics of the annual Wisconsin Public Library Service data report is \$427.9 million. This economic contribution does not include a host of other services such as community meeting space that provide real economic value but currently lack a statistical database. The table below summarizes the market value of public library services:

Summary Table: The Economic Value of Public Library Services

	2006 Circulation or Attendance	Economic Value
Children's materials	20,836,885	\$91,682,294
Adult Materials	37,243,815	\$272,997,164
Reference Transactions	4,760,201	\$27,609,166
Computer/Internet Access	7,123,690	\$28,494,760
Children's Programs	1,471,411	\$5,885,644
Adult Programs	207,551	\$1,245,306
Total Economic Value		\$427,914,334

Return on Investment

The total economic contribution of public libraries including the direct economic contribution and the market value of public library services is \$753,699,545. Public libraries serve a total state population of over 5.6 million people. Public library services are largely supported by public tax dollars. The return on investment in library services is \$4.06 for each dollar of taxpayer investment. The table below shows the per capita economic benefit of public libraries, the per capita amount of taxpayer support and the return on investment for every dollar of taxpayer support.

This calculation does not include a number of other services that provide significant return on investment but currently lack a statistical database. In addition, a considerable amount of state-level funding has not been taken into account, including funding for online database resources such as BadgerLink, as well as funding for the regional public library systems that provide services such as partial funding for online catalogs, additional online databases, continuing education, consulting services, delivery of

The Economic Contribution of Wisconsin Public Libraries

materials between libraries, and more. Consequently, the figures cited below represent a very conservative estimate of the return on investment of Wisconsin public library services.

The Return on Investment of Public Library Services in 2006

Total Economic Contribution of Public Libraries	\$753,699,545
Wisconsin Population Served by Public Libraries	5,617,744
Economic Contribution Per Capita	\$134.16
Public Tax Support Per Capita	\$33.07
Dollar Annual Return Per Dollar of Public Tax Support	\$4.06

Public Input and Library Usage Patterns

Part of this study included a public survey of library usage. The survey questionnaire was designed to gather input regarding library use and approximately 2,400 individuals from all over the state responded to the survey. Because survey respondents consisted primarily of regular library users, it should be noted that these data are probably not illustrative of all Wisconsin residents (library users and non-users) as a whole.

Use of Libraries by the Public

A majority of respondents (93%) are regular card-carrying public library users of the library and more than 90% report that they use the library at least once per month. Over 60% of respondents indicated that the library website was frequently used as a means to gather information and reserve library materials. In addition, more than a quarter of respondents contact the library by telephone. A majority of respondents (about 82%) contact reference librarians for assistance, and a significant majority (88.3%) of those who contact reference librarians do so in person.

Books remain the most popular items for library users to borrow. Approximately ¾ of respondents reported checking out DVDs or videos, while nearly half check out audio books and nearly a third check out periodicals.

Over ½ of survey respondents (about 56%) access the Internet at the public library, though only about 7% of all respondents are dependent on the library as their only means of access. Approximately 2/3s of respondents attend special events, classes, or programs held at public libraries.

About 30% of respondents indicated that when visiting the public library, they are likely to stop at nearby businesses that they would probably not have shopped at otherwise. Of those respondents who reported an amount spent on side trips to other businesses, the average amount spent was \$24.93.

Library Alternatives

Respondents were asked about a number of ways that their lives would be affected if they did not have access to a public library. Specifically, respondents were asked to estimate the amount they would spend if they had to pay for the same services elsewhere by purchasing or renting materials they currently have the option of borrowing from the library. Respondents who chose to answer those questions reported saving approximately \$205 per month as a result of using the public library.

Attitude Toward Public Libraries

Respondents were surveyed about their attitude toward public libraries and the extent to which they value the presence of public libraries in their communities. Almost all respondents felt that public libraries contribute in a meaningful way to the quality of life in their community, and that funding public libraries was a good use of tax revenue.

43% percent of respondents donate their time and/or money to public libraries. The average annual donation reported was \$130.07, while the average amount of volunteer time reported was 66.68 hours per year, or about an hour and a quarter per week.

SWOT Analysis

A basic step in evaluating the role of any institution or organization with respect to economic development is to assess its strengths, weaknesses, and opportunities, as well as threats to its development. This process is commonly referred to as a SWOT analysis. The information for the SWOT analysis of Wisconsin public libraries was obtained through public input at 29 focus group sessions held around the state.

Strengths

Strengths cited by participants included access to a wide range of information and materials, the fact that libraries are a community hub or gathering place, the public access to computers and the Internet, and access to resources to those who would otherwise be unable to afford them. Other strengths noted included services (such as interlibrary loan, classes, and job assistance), knowledgeable staff, and the library's encouragement of reading.

Weaknesses and Threats

The challenge cited most frequently was a lack of funding, which leads to a diminished level of service and/or the lack of ability to expand services. A lack of physical space was mentioned almost as frequently. Participants at almost every library we visited felt that the lack of physical space compromised the ability of their public library to provide a level and range of services that they would like to see. People also mentioned the

Internet as a challenge, and a decline in library use by people who seek information online instead of visiting a library.

Opportunities

There are a number of opportunities for public libraries to contribute to economic development and quality of life in communities throughout Wisconsin. Participants felt that public libraries must strive to keep library collections and technology as current and up-to-date as funding will allow. Another opportunity was to continue to build interest in reading and to continue recruiting new readers, particularly young readers, through initiatives like summer reading programs. There was also a strong sentiment to see libraries develop more collaborative partnerships with schools and universities, social service agencies, non-profit groups and community programs, as well to reach out to the business community for deeper involvement.

The Role of Public Libraries in the Information Economy

Although a number of participants expressed concern that libraries *could* become less important, most feel that public libraries would remain at least as important, if not more so in the an information based economy. As noted above, many people felt that the importance of libraries is a constant, and that libraries will remain important to them regardless of overall trends among the public or changes in technology.

Interestingly, the increasing availability of online content lead some to conclude that libraries are less important than they used to be in light of the ubiquity of the Internet, while others felt that libraries were more important as a result.

Conclusion

Public library use has increased as libraries continue to provide a broad range of services and adapt to changing technology and the needs and expectations of their clientele. Despite facing a wide range of challenges, from a need for funding and physical space to an erroneous public perception of declining library use, public libraries continue to make a valuable economic contribution to the State of Wisconsin. Public libraries are a significant driver of Wisconsin's economy, contributing more than ¾ of a billion dollars to the state economy on an annual basis, and returning a benefit of over \$4.00 to taxpayers for each dollar spent, both of which are in fact conservative estimates.

Public libraries benefit their communities in many other ways beyond those which are quantified in this report. As noted consistently by focus group participants all over Wisconsin, library users all over the state value their public libraries as community gathering places, as a resource for promoting reading and literacy, as a resource for small businesses, and a place where technology and information is available to everyone, regardless of income level.

CHAPTER 1:

INTRODUCTION

The Wisconsin Department of Public Instruction's Division for Libraries, Technology, and Community Learning commissioned this study to measure the return on taxpayer investment in public libraries in Wisconsin. The study is designed to determine the economic benefit of public libraries for Wisconsin residents, and how the public library contributes to their overall economic well-being and quality of life. Focusing on the array of services provided by Wisconsin public libraries, the expenditures from local, state and federal sources for those services, and the use and spending habits of library users, this study aims to capture and quantify the range of economic benefits offered by Wisconsin public libraries.

Public input was sought and data was collected to describe the economic impact of public libraries in Wisconsin communities, and to establish the general taxpayer return on investment for supporting public libraries in Wisconsin. The objectives of this study are several, including identifying those activities and services supporting economic development, as well as those circumstances and factors that contribute to the success of public library involvement in economic development. Additional objectives include establishing how Wisconsin public libraries are used by individuals, families, students and businesses, and finally to determine alternative costs and services for users in the absence of a public library.

The scope of this study encompasses Wisconsin public libraries as a whole. Although data was collected from respondents statewide, all data has been aggregated for analysis, and this report illustrates the economic benefit of Wisconsin public libraries when viewed as a whole. Individual reports quantifying the economic benefit of selected libraries in the state may follow, but analysis and conclusions specific to particular libraries or systems in the state is beyond the scope of this report.

Wisconsin has 388 public libraries, participating in 17 regional library systems, with total operating expenditures of more than \$223 million per year. Collectively, the libraries own more than 20 million books and serial volumes, more than 1 million audio materials, nearly 1.5 million video materials, and over 50,000 periodical subscriptions. More than 5,000 computers are available for use by the public, with more than 4,000 available for public Internet use. These resources and materials are used by more than 3 million registered borrowers, who made nearly 33 million library visits in 2006, and conducted more than 4.5 million reference transactions. Libraries offered more than 65,000 programs, with total attendance of approximately 1.7 million. Wisconsin public libraries employ more than 3,000 people, who collect nearly \$150 million in wages and benefits. Libraries receive in excess of \$200 million in government funding, including municipal and county appropriations, as well as state and federal funds. Wisconsin public libraries received nearly \$230 million in income in 2006. These figures were all derived from the most recent database available, the 2006 Wisconsin Public Library Service Data.

Clearly, there is significant economic input related to Wisconsin public libraries and the people who use them. In summary, the goal of this study is to analyze that economic activity and quantify and report the significant economic and other benefits enjoyed by Wisconsin residents as a result of the presence and operation of public libraries in their communities.

Review of Prior Studies

A number of prior economic impact studies involving public libraries were reviewed. Below are summaries of the economic impact portion of several of those studies:

- **Florida (2004)**

This study measured the economic impact of Florida's public libraries. The project placed Florida libraries into an evaluative framework that measured their economic impact in a manner comparable to other economic impact studies of other types of organizations. It used standard models of economic values, most notably the model developed by Regional Economic Models, Inc., and the Contingent Valuation Method. The study reported a return on investment of \$6.54 for each dollar of taxpayer support. It also reported that public libraries enhanced the quality of life in communities and helped to build a stronger state economy

- **Indiana (2007)**

The Indiana study measured the economic impact of public and academic libraries on the Indiana economy. The study measured the direct economic impact of library spending and the indirect impact of that spending. The study presented a cost to benefit ratio of \$2.38 that measured the direct economic benefit compared to each dollar of library cost.

- **Ohio (2006)**

This study covered libraries in the southwestern part of Ohio. It reported a direct economic impact of nearly four times the amount invested in their operations. The value the libraries' cumulative expenditure of about \$74 million returned a quantifiable direct economic benefit of \$238.6 million, or \$3.81 for each dollar expended in 2005. The study also recognizes that these libraries add significant value to their users and communities that cannot be assigned a dollar value including improved economic prospects and an enhanced quality of life.

- **Pennsylvania (2006)**

The Pennsylvania study measured the value of public libraries on a contingent valuation basis (what if there were no public libraries). The study estimates how much it would cost consumers to get needed information, how much the economy would lose if the salaries of public library staff didn't exist, and how much would be lost in a halo effect by businesses who would not get the spending dollars of library patrons who would use these businesses as they went to or from a public library. Altogether, the Pennsylvania study estimates that the taxpayer return on investment would be \$5.55 for every tax dollar spent.

- **South Carolina (2005)**

The South Carolina study was completed in 2005 and reported on the perceived value of libraries to library users and the economic impact of public libraries in the State of South Carolina. The study measured the direct and indirect economic impact of library expenditures, the value of circulation of library materials, and the value of reference services. The study calculated a total direct and indirect return on investment of \$4.48 for each \$1 expended on public libraries.

- **Vermont (2007)**

The Vermont Department of Public Libraries published a study on the economic impact of public libraries in the State of Vermont. The study followed the methodology used in the South Carolina study. The Vermont study reported both a direct and indirect return on investment. The direct economic ROI which included the value of library services was \$5.05 per dollar of tax support. The indirect ROI, the value of the multiplier effect of direct spending, was \$1.91 in benefits for each dollar of tax support. The overall return on investment for each tax dollar was \$6.96.

CHAPTER 2:

THE ECONOMIC CONTRIBUTION OF PUBLIC LIBRARY SPENDING TO THE WISCONSIN ECONOMY

Public libraries are a source of economic activity in every region in the state. The overall economic contribution of public libraries is measured in two ways:

- The direct economic contribution that comes from staff spending, staff salaries and other operating expenditures of libraries, construction spending to build and maintain facilities, and the spending of visitors.
- A second form of economic contribution is the value of library services offered to businesses and consumers. This value is based on market costs to provide these services.

This chapter deals with the direct economic contribution of public libraries that comes from the expenditures by staff, public library organizations and visitors.

The second form of economic contribution is derived from the market value of the services of public libraries and this contribution will be covered in the next chapter of this report.

A third chapter will tie together the two forms of economic contribution to the state economy and present a return on investment calculation which measures the economic benefit to state citizens that comes from tax support of public libraries.

Public Library Revenue Sources

In 2006, public libraries derived revenue from the following six sources:

- Municipal appropriations
- County appropriations
- State funds
- Federal funds
- Contract income
- Other income

Revenue received from each of these sources is summarized in Figure 2-1 below.

Figure 2-1
Revenue Sources
Fiscal Year 2006

Revenue Source	Amount	Percent of Total
Municipal Appropriation	\$136,681,201	59.5
County Appropriation	49,074,055	21.3
State Funds	17,443,552	7.6
Federal Funds	1,790,751	.8
Contract Income	1,230,938	.5
Other Income	23,662,732	10.3
Total Revenue	\$229,883,229	100.0

Source: Wisconsin Public Library Statistics, 2006

Public Library Expenditures

Public libraries in Wisconsin spent \$210,397,739 on operating expenditures and \$13,134,087 on capital outlays. Expenditures on staff salaries and wages (gross payroll) amounted to \$107,549,911. The salaries and wages paid to employees are spent largely in the local economy.

It should be noted however, that a significant amount of the payroll expenditures of public libraries does not go to benefit the state economy, but instead is spent on federal income tax withholding and social security taxes that leave the area and are sent to the U.S. government. The study adjusts for the economic impact of this large amount of “leakage” by deducting these payments before calculating the overall economic impact of spending on staff salaries and wages.

Public library expenditures for goods, services, and employee benefits (beyond direct salary and wage payments) totaled \$102,847,828. Much of this spending benefits the regional economy and this impact is explained later in this report.

A breakdown of the public library expenditures is shown in Figure 2-2.

Figure 2-2
Wisconsin Public Library Expenditures
Fiscal Year 2006

Expenditure Item	Amount	Percent of Total
Net Pay to Staff	\$ 81,192,035	36.3
Withholding Taxes Paid to Federal/State Governments	26,357,876	11.8
Employee Benefits	41,018,069	18.4
Library Materials	24,960,936	11.2
Contract Services	2,630,343	1.2
Spending on Other Library Operations	34,115,869	15.3
Capital Expenditures	13,134,087	5.9
Total Expenditures	\$223,409,215	100.0

Source: Wisconsin Public Library Statistics, 2006

Economic Contribution of Public Library Expenditures

Public library spending contributes to Wisconsin's economy through direct spending on goods and services, payroll, and visitor spending. This direct spending then multiplies through the regional economy as these expenditures finance the operations of regional state businesses which in turn spend the money on payroll, benefits and operating costs. That money in turn is spent, resulting in many rounds of indirect spending.

Direct Spending

Direct public library spending in 2006 totaled \$223,409,215. Most of that spending benefited sectors of the Wisconsin economy. The primary components of that spending are non-payroll operating expenditures and employee payroll (salary and wages).

In addition, public libraries and their staffs attract visitors from all over who spend money in Wisconsin. There are also visitors who are vendors and service workers who spend money in reaching the library destination. Finally, there are people who will visit to attend library events, to use special collections and who will use the historical and genealogic resources of local public libraries. The value of visitor spending is based upon original survey data obtained in economic impact studies for the University of Wisconsin-Madison and the University of Wisconsin-Oshkosh. We have estimated this visitor spending to be \$8,865,933 and have included this amount in the direct economic impact analysis.

Figure 2-3 shows the economic contribution from institutional spending, spending of staff, and visitor spending. This contribution is derived from an economic model that adjusts for spending items such as income tax withholding that is sent out of the region and other "leakages". Other leakages would include spending on library materials and subscriptions purchased from firms outside the state. In this study, it is assumed that

The Economic Contribution of Wisconsin Public Libraries

95% of the money spent on books, subscriptions and other library materials is spent outside the state and therefore doesn't directly contribute to the Wisconsin economy.

The direct contribution (not counting the economic multiplier effect) that public libraries make to the Wisconsin economy in fiscal terms includes an impact of approximately \$142,219,703.

Total Economic Contribution

The total economic contribution that public libraries make to the Wisconsin economy due to spending on staff, staff benefits, operating expenses, construction spending and visitor spending is much greater than the direct spending made by the libraries, its employees and visitors. All of the dollars spent by public libraries, their employees and visitors on goods and services recycle through the state economy to be spent again on goods and services by the businesses and citizens that serve the public libraries. This rippling effect of spending is captured in economic multipliers (mathematical factors representing fiscal dollar flows through the economy) that are applied to the direct public library spending.

The total economic contribution made by public libraries to the Wisconsin economy is over \$326 million. Spending by staff accounts for \$197,404,830 in economic impact on the state. The economic impact of library operating expenses accounts for \$114,618,459 in economic impact. Visitor spending accounts for \$14,604,543 in economic impact. (See Figure 1-3)

Figure 2-3
Total Economic Contribution
Fiscal Year 2006

Contributor	State Economy
Library Operations	\$ 114,618,459
Staff Spending	197,404,830
Visitor Spending	14,604,543
Total Contribution	\$ 326,627,832

Job Generation

The money that public libraries spend on payroll, benefits, construction, operating costs and services generates jobs for Wisconsin citizens. Jobs attributable to public library spending occur in four ways. The first is the direct staff jobs for people working for public libraries. The second job creator is the jobs generated by non-payroll library expenditures. The third job creator is the jobs that result from the people that serve the public library workforce in their professional and private lives. The fourth job creator is the jobs generated by visitor spending. Figure 1-4 summarizes jobs created by each of these components.

Public libraries directly employ 3,222.42 full-time employees (FTEs).

Public library payroll and benefits (staff spending), public library operating and construction spending, and visitor spending create an additional 3,058 jobs.

Figure 2-4
Job Creation
Fiscal Year 2006

Job Generator	Number of Jobs
Direct Employment	3,222
Library Operating Spending	1,453
Staff Spending	1,349
Visitor Spending	256
Total Jobs Created	6,280

The total number of jobs created in Wisconsin due to the presence of Wisconsin public libraries is 6,280.

Income and Sales Tax Revenue Generation

Not only do public library employees pay state income taxes and sales taxes on their purchases, but their economic activity helps to build the local tax base. As shown above, the money public libraries spend generates jobs. Those jobs, in turn, generate income and spending. That subsequent income and spending are taxed through personal income and sales taxes. The total regional income, sales, and property tax revenue generated by public library economic activity in the state totaled almost \$24 million.

Figure 2-5
Tax Revenue Generation
Fiscal Year 2006

Tax Revenue Generator	Tax Revenue
State Income Tax	\$ 9,102,927
Sales Tax	5,158,998
Property Tax	9,654,319
Total Tax Revenue Generated	\$ 23,916,243

Summary

The operating revenues of public libraries in Wisconsin in fiscal year 2006 were over \$229.9 million. County and municipal funds accounted for 81% of funding support for public libraries. State funds provided 7.6 % of operating revenue while the Federal government contributed less than 1% of library operating funds. Public libraries generated approximately 11% of funding through fines, printing charges, donations, revenue from support groups, contract service payments, and other revenue generating activities.

Total state spending attributable to public libraries was over \$223.4 million in fiscal year 2006. All of the dollars spent by public libraries, their employees and visitors on goods and services recycle through the state economy to be spent again on goods and services by the businesses and citizens that serve the public libraries. The total economic contribution made by public libraries to the Wisconsin economy is over \$326 million.

Public libraries employ a workforce of 3,222 FTEs. Public library related economic activities including the spending of staff, operating expenses, construction projects, and visitor spending resulted in the creation of another 3,058 jobs. In total, 6,280 jobs are created as a result of the economic activity of public libraries.

Public library economic activity also contributes to the generation of tax revenues. In 2006, the economic activity of public libraries in Wisconsin generated state income, sales, and property tax revenues of almost \$23.9 million.

CHAPTER 3:

THE ECONOMIC CONTRIBUTION OF PUBLIC LIBRARY SERVICES TO THE WISCONSIN ECONOMY

In the last chapter, the economic impact of public libraries that comes from the spending of staff, the library operations, and visitors was quantified. That overall impact in 2006 was \$326 million. This economic impact is a part of what libraries contribute to the Wisconsin economy. The other measure of value is the market value of public library services to consumers, businesses, governmental bodies and other sectors of the economy.

This chapter extends the analysis of the economic value of public libraries to the market value of services provided to the citizens of Wisconsin by Wisconsin's public libraries. The use of market value as opposed to the cost of the service is an important differentiation to keep in mind. Many studies of economic impact look at what it costs a library to provide a service. This cost concept is used as a basis for determining the economic impact of public libraries.

This study takes a market value approach to determine the economic value of public library services. The value of each type of library service to a library user is better measured in economic terms by what it would cost that user to buy the service in an open market place. Thus in this chapter, the value of library services is measured by market value to the library user.

The Value of Library Services to the Wisconsin Economy

As the studies reviewed in Chapter 1 show, there are a number of ways of evaluating the value of public library services. In the following sections, the value of Wisconsin public library services and the general methodology for calculating market value are shown and explained.

Children's Materials

In 2006, Wisconsin public libraries reported a total statewide circulation of 20,836,885 transactions from children's materials collections. According to the 2006 edition of Wisconsin Public Library Service Data (WPLSD), each transaction represented the act of lending an item from the library's collection for use outside the library. There is no way of knowing definitively how many additional items were used within the library facility, although surveys have been conducted in the past to arrive at an estimate. In 2005, it was estimated that in-house use was equal to about 26% of reported circulation.

The common practice in most economic impact studies is to value each circulation item based upon the market cost of the item. There appear to be two general methodologies used for calculating the value of book circulation. For books, many studies use a relatively low percentage of the average price of new book cost on the theory that a

library patron may be able to obtain the item on the used book market at a discount to the full price of a new book. In the Indiana public library economic impact study, the average cost of new books as reported in Bowker's *Books in Print* is discounted by 80% to derive a market resale price that is used to calculate the market value for book circulation.

A second methodology for valuing book circulation is based upon the average cost of books purchased by public libraries. This methodology takes into account the efficiency and volume discounts of a large book purchaser and then again discounts that value by a significant percentage. In the South Carolina public library impact study, the average cost of a hardcover book is discounted by 50% to get a cost based value for book circulation.

To derive the value of other non-print items in the library collection, generally most studies research used market prices for CD's, DVDs, and other audio and video material.

In this study, the value of circulation is based upon the market value approach as opposed to a cost of materials method. The circulation value of books, audio and video materials is weighted by their proportion in the overall state library collection and this weight is applied to a market price for used materials in each category. See Chapter 7 for more information on the methodology employed to determine the value of materials.

Following the general methodology described above, the value of the circulation of over 20,000,000 children's items is shown below.

Economic Value of Children's Materials Circulation = \$91,682,294

Adult Materials

In 2006, Wisconsin public libraries reported a total statewide circulation of 37,243,815 transactions for adult materials. The definition of a circulation transaction is explained above and the use of adult materials used within the library is not included in the circulation number.

Adult circulation numbers, as is the case with children's materials, are not categorized by item such as books, CDs, DVDs, etc. What is recorded is a total circulation number for all items by patron category such as children's material and adult materials.

Following the general methodology described above for children's materials, the value of the circulation of over 37,000,000 adult items is shown below.

Economic Value of Adult Materials Circulation = \$272,997,164

Reference Calls and Transactions

In 2006, Wisconsin public libraries reported total statewide reference transactions of 4,670,201. The definition of a reference transaction is explained in the 2006 Wisconsin Public Library Service Data (WPLSD) publication. According to the WPLSD publication a reference transaction “involves the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff.” Further the WPLSD publication indicates that the reference request “may come in person or by phone, fax, mail, or electronic mail from an adult, a young adult, or a child.”

Reference transactions may involve print or non-print information sources, machine readable databases, library catalogs, and other libraries or institutions. Reference transactions do not include questions regarding operating hours, directions involving library facilities, or library policies.

The economic value of a reference transaction is a function of the time spent per transaction and the intrinsic value of the time of the librarian answering the reference request. In most other statewide library impact studies, the value of a reference librarian’s time is determined and that amount and the amount of time spent on each reference call determines the market value of each reference transaction.

In this study the value of a reference transaction is based upon the average hourly wage of librarians is \$23.19 as reported by the Wisconsin Department of Workforce Development. It is assumed that the total time (answering the call, researching data, follow up, record keeping) spent on reference calls is 15 minutes. The time estimate falls in the mid range of public library economic impact studies reviewed for this report.

Following the methodology described above, the market value of reference transactions is shown below.

Economic Value of Reference Transactions = \$27,609,166

Computer/Internet Access

In 2006, Wisconsin public libraries reported that there were 5,386 computers available statewide for library patrons. About 80% or 4,369 of those computers were connected to the Internet. High levels of use of these computers were reported in every library that hosted a group session for this economic impact study.

Many people interviewed as part of this study indicated that the library was their only access to the internet because they could not afford a personal computer and or the monthly charges for home internet access.

The economic value of computer access is a function of the number of hours that computers are used by library patrons and the approximate market value of that access. Many prior public library studies assign a fairly nominal value such as fifty cents to each

hour of available computer time. This value is usually based upon an amortization of the hardware costs for a desktop computer, operating software, and internet access.

Most private sector studies conducted by firms such as the Gartner Group assess the cost of computer hardware as a minor part of the annual total cost to operate a computer. These studies suggest that operating costs such as maintenance, administration, system operations, down time, and electricity are seven to thirteen times the annual hardware costs. This observation was confirmed in talking to CIOs for several state university systems.

A second market test for the value of computer access for library user is the cost of accessing a personal computer with an internet and printer connection. Firms such as Kinko's provide such a service and a very cursory survey of costs showed market prices of 20-30 cents per minute for high end personal computers.

For this study, it is estimated that the public library computers in Wisconsin are used about 2/3s of the available time or about 1,322 hours per year. The value of each hour of use is set at \$4 reflecting about 50 cents in annual hardware costs and \$3.50 in operating costs (or a 7:1 ratio of operating costs to hardware purchase costs). Following this methodology, the value of computer and internet access is shown below.

Economic Value of Computer/Internet Access = \$28,494,760

Children's Programs

In 2006, Wisconsin public libraries reported a total statewide attendance at children's programs held in Wisconsin public libraries of 1,471,411. A program is defined as a single session that provides information through presentations of talks, readings, dramas, films, demonstrations and similar activities.

Many people interviewed as part of this study mentioned summer reading programs as an important element in children's programming at public libraries.

The economic value children's programming is a function of the approximate market value of a session and the number of children who take part in these programs. Market values were taken from a sample of children's programs offered by park and recreation departments, YMCA and YWCA's, and other organizations. An average value for attendance at a children's program was set at \$4.

Following the methodology described above, the economic value of children's programs was calculated and is shown below.

Economic Value of Children's Programs = \$5,885,644

Adult Programs

In 2006, Wisconsin public libraries reported a total statewide attendance at adult programs held in Wisconsin public libraries of 207,551. A program is defined as a single session that provides information through presentations of talks, readings, dramas, films, demonstrations and similar activities.

The economic value adult programs is a function of the approximate market value of a session and the number of adults who take part in these programs. The value of an adult program was set at \$6 based upon prior library economic impact studies and a brief survey of community adult programming in Wisconsin.

Economic Value of Adult Programs = \$1,245,306

Total Value of Library Services

The total economic value of those library services covered in the statistics of the annual Wisconsin Public Library Service data report is \$427.9 million. This value does not include a host of other services that provide real economic value but currently lack a statistical database. In addition, a considerable amount of state-level funding has not been taken into account, including funding for online database resources such as BadgerLink, as well as funding for the regional public library systems that provide services such as partial funding for online catalogs, additional online databases, continuing education, consulting services, delivery of materials between libraries, and more. Consequently, the figures cited below represent a very conservative estimate of the total economic value of Wisconsin public library services.

Figure 3-1
Summary Table: The Economic Value of Public Library Services

	2006 Circulation or Attendance	Economic Value
Children's materials	20,836,885	\$91,682,294
Adult Materials	37,243,815	\$272,997,164
Reference Calls	4,760,201	\$27,609,166
Computer/Internet Access	7,123,690	\$28,494,760
Children's Programs	1,471,411	\$5,885,644
Adult Programs	207,551	\$1,245,306
Total Economic Value		\$427,914,334

Other Services

There are a number of other services provided by public libraries which have significant economic value, but for which there is not enough data to make an economic contribution calculation. Below are several examples of these services:

- **Meeting Rooms** – Wisconsin public libraries host a large number of community meetings for non profit and other groups. Meeting space was identified as a strength or asset that a public library brought to a community. The value and importance of this meeting space varied by location. In rural settings, often libraries are a central community gathering space and the public space for meeting rooms was very highly valued. In larger cities, libraries again served neighborhoods and nearby community groups who often could not afford private meeting space. The average cost of renting a meeting room elsewhere is nearly \$100¹.
- **Career and job information** – Another asset commonly identified by focus groups in this study was the value of job and career information that could be accessed from the public library. With the increasing use of the internet by prospective employers, access to the internet and job posting through the public library has become more important, particularly in low income poorer parts of the state.
- **Periodicals and Subscriptions** – A significant asset of Wisconsin public libraries is the periodical holdings. There is observable daily traffic of patrons who come in to read magazines, newspapers and other periodicals. The 2006 WPLSD publication reports that Wisconsin public library had a total of 51,331 periodical subscriptions.
- **Electronic Databases** - BadgerLink databases, as well as other local and system-funded databases are available both at Wisconsin public library facilities and online. The state, library systems and local libraries all purchase subscriptions to electronic databases that are available through computers in the library facilities, and often through remote access to library users at home, school, and/or their places of business. These databases provide quality information on a wide variety of subjects, most of which is not available on the Internet for free. In 2006, there were 18,846,700 BadgerLink searches statewide. In 2007, 62 local public libraries funded databases and reported 420,000 user sessions, and 7 public library systems funded databases and reported 214,000 user sessions.
- **Materials for People with Disabilities** – Books on tape, large print books, digital readers and other devices that serve specific populations with physical handicaps are available at libraries throughout the state, with the largest selection available through the Library for the Blind and Physically Handicapped at the Milwaukee Public Library. In some public libraries, there are library resources available to serve patrons with diminished eyesight and other physical challenges, and all libraries in the state can acquire them from the Milwaukee library. The specific economic value of these library materials is especially significant to a small part of the millions of Wisconsin library users.

¹ Based upon an informal survey of 33 locations all across Wisconsin, the average cost of a half-day rental of a meeting room is \$99.27.

- **Wi-Fi Access** - According to data collected in 2007, 64% of Wisconsin public libraries, representing 87% of the state's population, offer free wireless (wi-fi) Internet access. While the economic value is difficult to quantify, wi-fi access is a valuable service provided by public libraries. In a time when restaurants, hotels, and other retail establishments are increasingly making this service available, meeting this need is essential to continuing to draw people in to spend time in their local libraries.

CHAPTER 4:

THE RETURN ON INVESTMENT FOR PUBLIC LIBRARY SERVICES IN THE WISCONSIN ECONOMY

This chapter summarizes the economic calculation of direct economic impact and the value of library service that were discussed in Chapters 2 and 3 of this report. In addition to summarizing the total value of public library services, that analysis is extended to include an approximate measure of return on investment that provides a base of comparison and an overall measure of economic value of public libraries.

As stated in Chapter 2, public libraries are a source of economic activity in every region in the state. The overall economic contribution of public libraries is measured in two ways:

- The direct economic contribution that comes from the spending of staff, operating expenses of libraries, construction spending to build and maintain facilities, and the spending of visitors.
- A second form of economic contribution is the value of library services offered to businesses and consumers. This value is based on market costs to provide these services.

The direct economic contribution of Wisconsin's public libraries that is derived from economic activity including payroll, operating, visitor, and construction spending is shown in Figure 4-1 below. Overall, public libraries have an economic impact of \$326,627,832 on the Wisconsin economy.

Figure 4-1
Total Economic Contribution
Fiscal Year 2006

Contributor	State Economy
Library Operations	\$ 114,618,459
Staff Spending	197,404,830
Visitor Spending	14,604,543
Total Contribution	\$ 326,627,832

In addition to the direct economic impact, public libraries contribute valuable services to Wisconsin citizens and businesses. The value of most of these services was calculated in Chapter 3. Figure 4-2 below summarizes the value of public library services to Wisconsin citizens and businesses. The value of those services is \$427,914,334.

**Figure 4-2
Summary Table: The Economic Value of Public Library Services**

	2006 Circulation or Attendance	Economic Value
Children's materials	20,836,885	\$91,682,294
Adult Materials	37,243,815	\$272,997,164
Reference Calls	4,760,201	\$27,609,166
Computer/Internet Access	7,123,690	\$28,494,760
Children's Programs	1,471,411	\$5,885,644
Adult Programs	207,551	\$1,245,306
Total Economic Value		\$427,914,334

Measuring the Overall Economic Impact and Return on Investment

Figure 4-3 below summarizes the economic contribution from library operations and the contribution of the value of public library services. Together, these two economic contributions total \$753,699,545.

**Figure 4-3
The Total Economic Contribution of Wisconsin Public Libraries**

	2006 Economic Contribution
Direct Economic Impact	\$326,627,832
Value of Library Services	\$427,914,334
Total Economic Contribution	\$753,699,545

Measuring the Overall Return on Investment

One way to look at the overall economic contribution of libraries is to calculate a return on the support provided by taxpayers. For every dollar of public taxpayer support, what is the return in the value of services or direct economic contribution that comes from libraries?

Figure 4-4 shows the economic contribution of libraries per dollar of taxpayer support.

**Figure 4-4
The Return on Investment of Public Library Services in 2006**

Total Economic Contribution of Public Libraries	\$753,699,545
Wisconsin Population Served by Public Libraries	5,617,744
Economic Contribution Per Capita	\$134.16
Local and County Tax Support Per Capita	\$33.07
Dollar Annual Return Per Dollar of Public Tax Support	\$4.06

The Economic Contribution of Wisconsin Public Libraries

The economic return to taxpayers is \$4.06 per dollar of taxpayer support. The ROI is calculated by dividing the economic contribution of public libraries per capita (\$134.16) by the public tax support per capita (\$33.07). This return per dollar of taxpayer funds comes back to taxpayers in the form of the value of public library services and the direct economic contribution of public libraries to the state economy.

In addition to the measurable services and expenditures that add value to the state economy, there are numerous other services that are valuable but at this time can't be calculated from available data. The contributions of public libraries to overall literacy, to helping people with special needs, to supporting the efforts of pK-12 schools, to providing community gathering space, and to supplying data needs of big and small businesses are additional and valuable contributions to the state economy.

CHAPTER 5:

PUBLIC INPUT: LIBRARY USAGE PATTERNS AND VALUE OF LIBRARY SERVICES

Public input for this study was gathered through a couple of avenues, a survey questionnaire, and focus group interview sessions. Data and information obtained through the focus group sessions is discussed in detail in Chapter 6.

Survey Questionnaire

The survey questionnaire was designed to gather input regarding library use all over the state. Survey respondents were asked questions in a variety of categories:

- Library Use
- Library Alternatives
- Attitude about Public Libraries
- Demographic Information (zip code, age, gender, marital status, household income, educational attainment, home ownership)

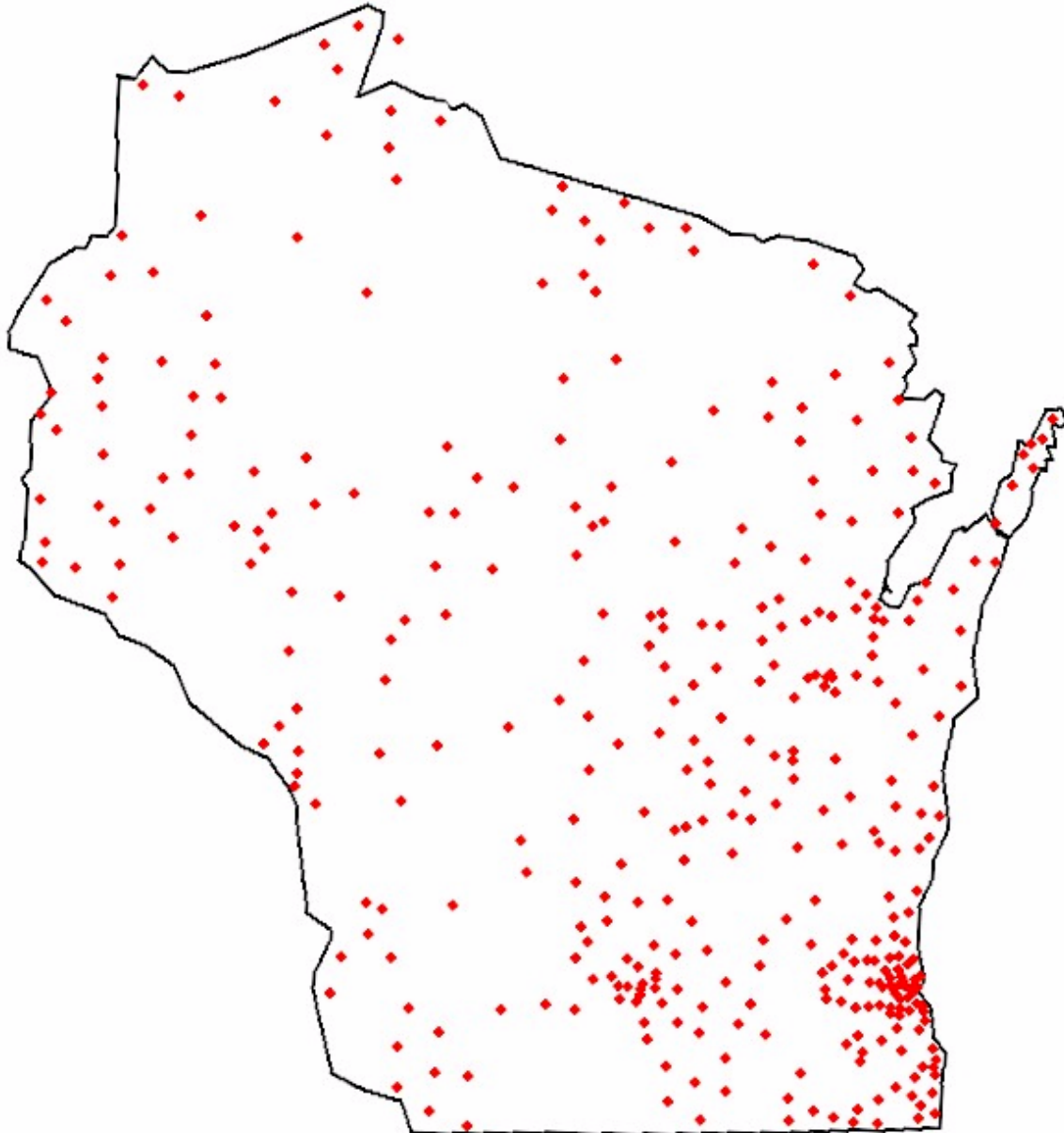
The survey was made available online in both English and Spanish through a web-based survey tool². A link to the online survey was placed on the NorthStar Economics website³, and the survey was promoted in a number of ways. Libraries all over the state were provided with signage, encouraging people to take the survey online. In addition, packets of hard copies of surveys were distributed to selected libraries in each library system. Focus group sessions, whose participants consisted of both library users and non-users, were asked to complete the survey, and library directors and staff - both public and academic - informed the public about the survey through publications and e-mailing lists. NorthStar staff assisted several visually impaired library users with replying to the survey by telephone. More than 2,500 individuals responded to the survey. Figure 5-1 below illustrates the residential address of each survey respondent. Each point in Figure 5-1 represents a zip code from which at least one response was received. However, the total number of responses is considerably higher than the number of points plotted, as certain zip codes include as many as 50 respondents.

Inasmuch as survey respondents consisted primarily of library users who cared enough about the issues to participate in the study, it must be noted that these data are probably not illustrative of Wisconsin residents (inclusive of both library users and non-users) as a whole. However, given the high number and the geographic distribution of responses, the data provide valuable insight into the characteristics of regular Wisconsin public library users. See Chapter 7 for more information on survey methodology.

² <http://www.surveymonkey.com>

³ <http://www.northstareconomics.com>

Figure 5-1
Geographic Distribution of Survey Respondents



Library Use

A substantial majority of respondents (93%) are regular card-carrying users of the library, with more than 1 in 5 respondents reporting that they hold library cards for more than one library or system. It should also be noted that while some respondents may only have reported holding a single library card, that card may allow them access to other libraries in a consortium. Survey respondents tended to be avid library users, with more than half reporting that they use the library once a week or more, and more than 90% reporting that they use the library at least once per month. Nearly all survey respondents frequently visit a library in person, and 4 out of 5 often access the library online. In addition, more

than a quarter of respondents contact the library by telephone. These data are summarized in Figures 5-2 through 5-4 below. Note that data in Figure 5-3 do not sum to 100%, as many respondents access the library in more than one way.

Figure 5-2
Frequency of Library Use

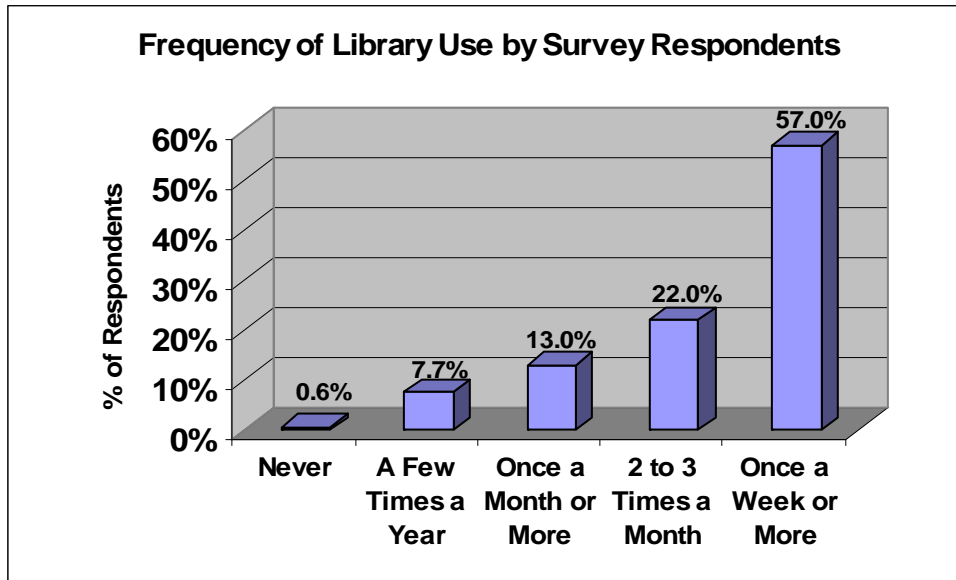
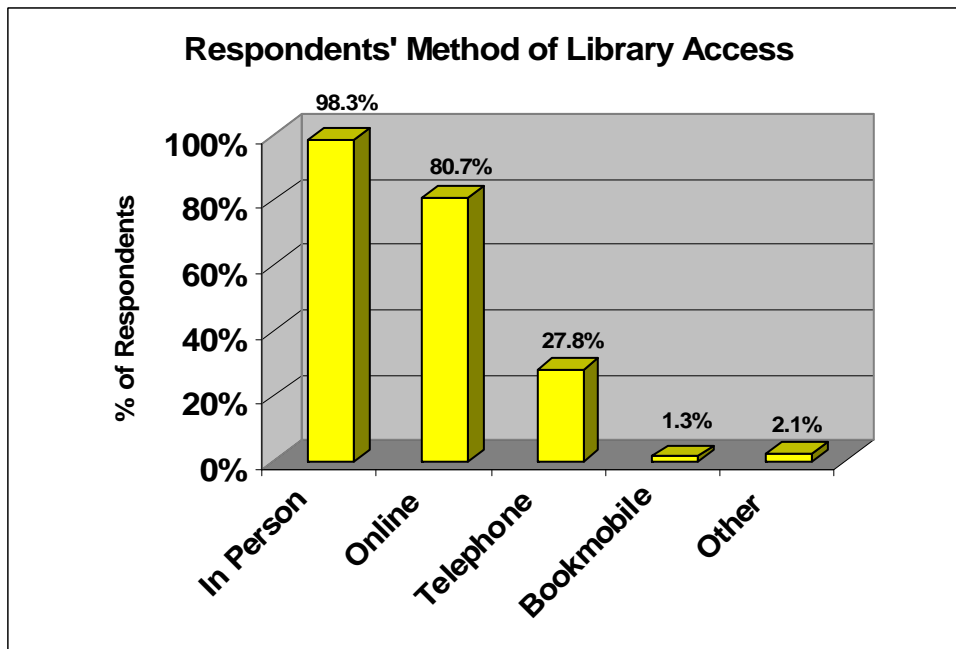
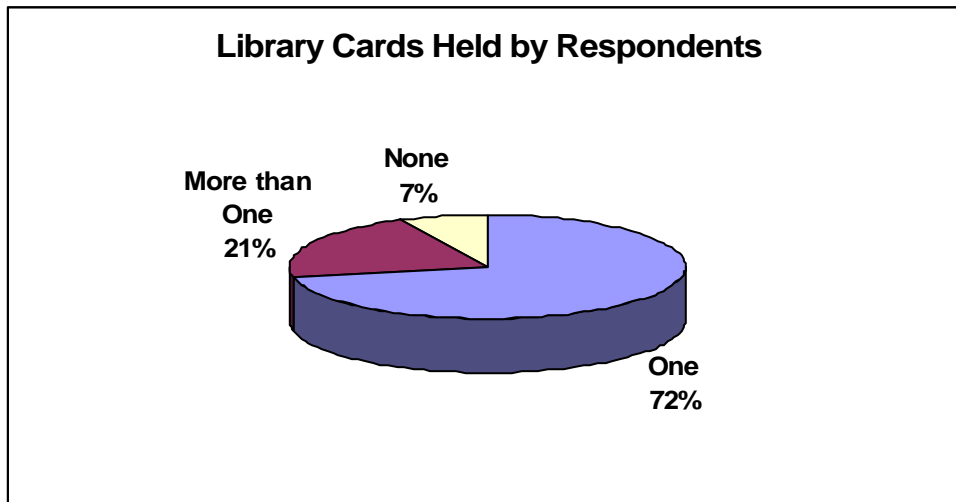


Figure 5-3
Means of Library Access

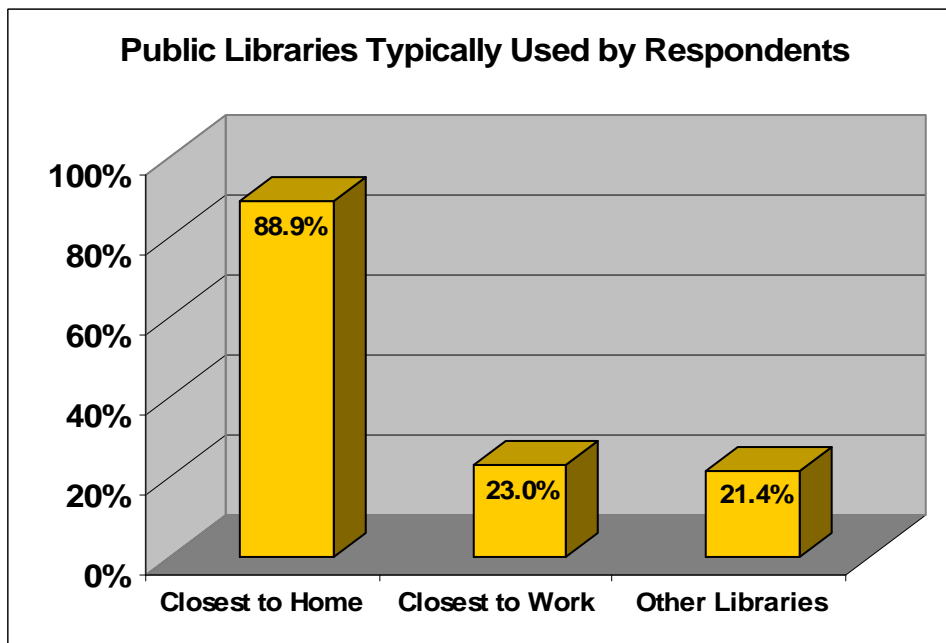


**Figure 5-4
Library Card Ownership**



Although a significant majority of respondents (89%) report that they typically use the library closest to their residence, 23% tend to use the library closest to their school or workplace, either instead of or in addition to the library closest to where they live, while nearly as many (21%) use other libraries, usually in addition to other libraries. Quite a few respondents report using more than one library on a regular basis. Data is summarized in Figure 5-5 below. Again, note that data does not sum to 100% as many respondents use more than one library on a regular basis.

**Figure 5-5
Libraries Used on a Regular Basis**



Respondents reported a variety of reasons for using other libraries despite what would seem to be their less convenient locations. The most commonly reported reason for using other libraries was a greater selection or wider variety of materials available at other facilities. Several respondents also noted that they travel or have reason to be closer to other branches and they routinely stop at whatever library is closest to the community they happen to be in at the time. Some respondents also noted aesthetic reasons for the choice, such as the friendliness of the staff or the relative comfort of a particular library facility.

Books remain the most popular items for library users to borrow. Nearly all respondents reported checking out books. However, approximately three quarters of them reported checking out DVDs or videos, while nearly half check out audiobooks, and nearly a third check out periodicals. A significant number of respondents also check out other materials, music CDs being cited most frequently. Only about 1% of respondents forego checking out any materials. The most common number of items borrowed per visit is 3 or 4, though the percentage of respondents who borrow more than that is nearly equal, as is the number who typically borrow fewer items. This information is summarized in Figures 5-6 and 5-7 below.

Figure 5-6
Library Materials Checked Out

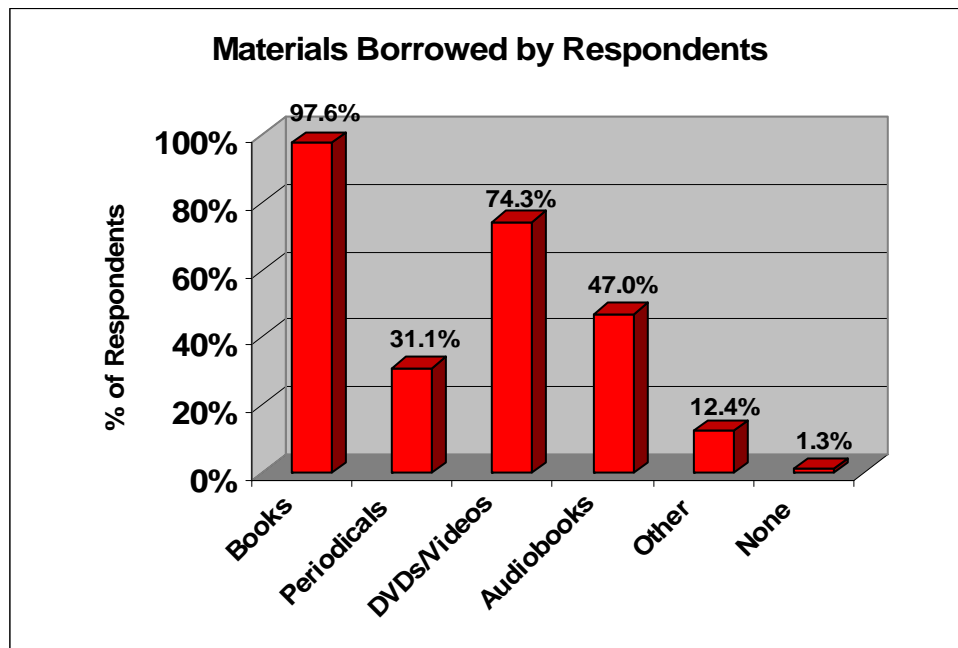
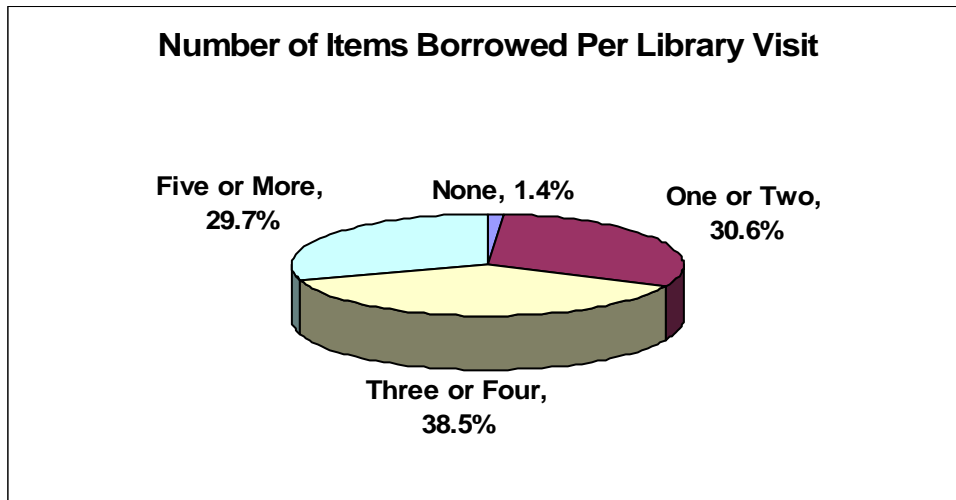
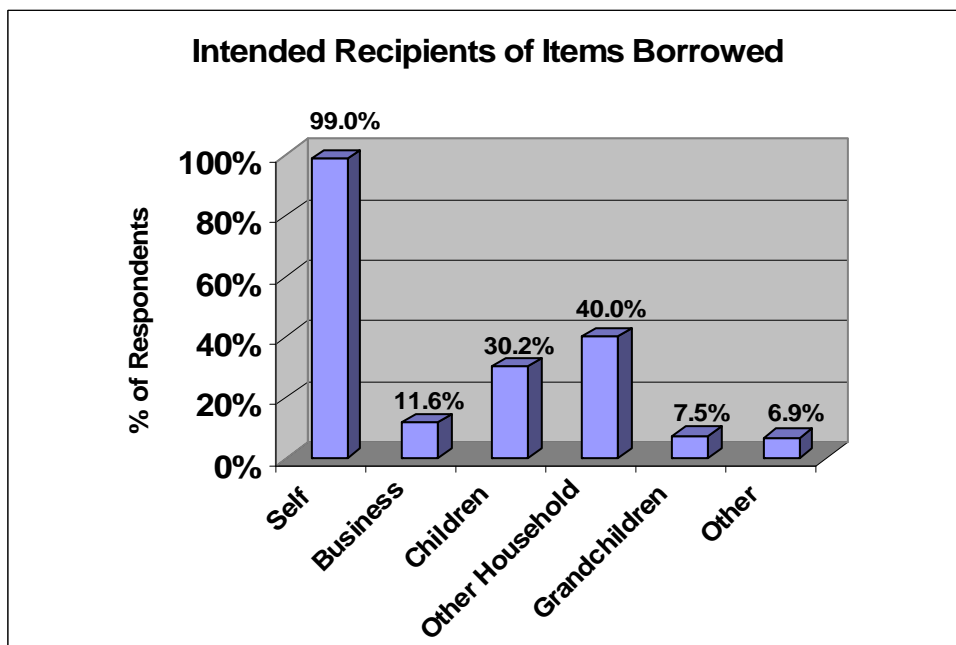


Figure 5-7
Number of Items Borrowed by Survey Respondents on a Typical Library Visit



Not surprisingly, nearly all respondents report that they check out materials for themselves. However, a significant number of respondents report borrowing materials for others as well. More than 30% of respondents report borrowing items for their children, and 40% report that they check out items for other members of the household. A significant number of respondents also borrow materials for their employer. Parents and friends were frequently mentioned as other intended recipients of borrowed materials. Data is summarized in Figure 5-8 below.

Figure 5-8
Intended User of Items Borrowed by Respondents



Nearly all respondents (98.4%) reported borrowing media for personal use and enjoyment, while 69.6% reported using the library for educational/ research materials for school, work or special projects. 8% reported using the library for other things.

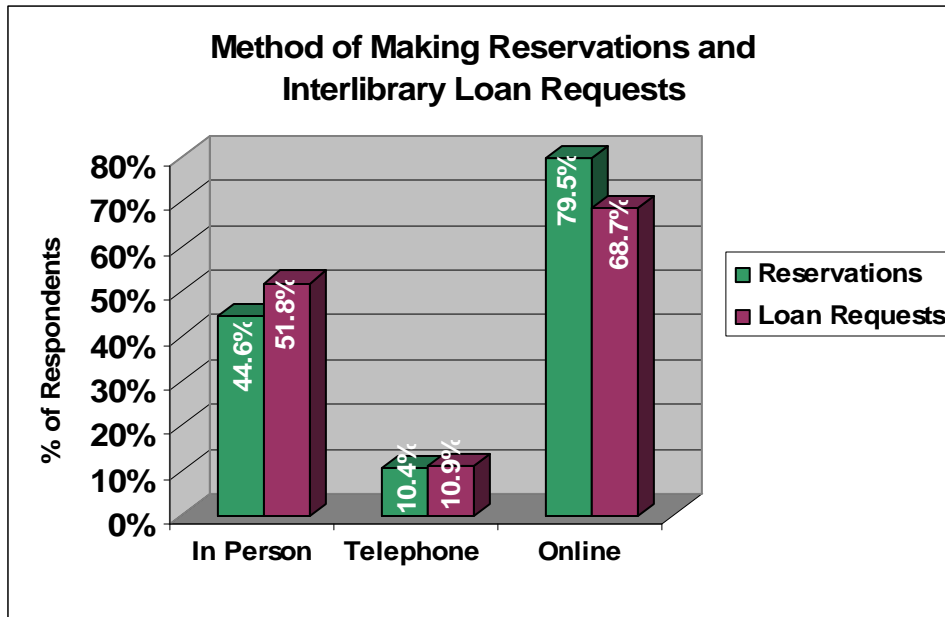
A substantial majority (93.6%) of respondents reported finding, at least occasionally, that materials they wanted to borrow from their local library were not in stock at the time. On those occasions, the overwhelming majority of respondents reserve the item (about 95%) or request the item through interlibrary loan (90%). Very few respondents were unaware of those options. The frequency with which respondents reported finding items out of stock, making reservations, and requesting interlibrary loans is shown in Figure 5-9.

**Figure 5-9
Respondents Who Find Items Out of Stock, Reserve Items,
and Request Interlibrary Loan**

RESPONDENTS WHO REPORTED:	Find Items are Out of Stock	Reserve Item	Request Interlibrary Loan
Never	6.6%	4.8%	8.8%
Occasionally	73.2%	21.6%	33.8%
Frequently	17.2%	25.8%	24.5%
All the Time	3.2%	47.5%	31.7%
Unaware of the Option	N/A	0.6%	1.5%

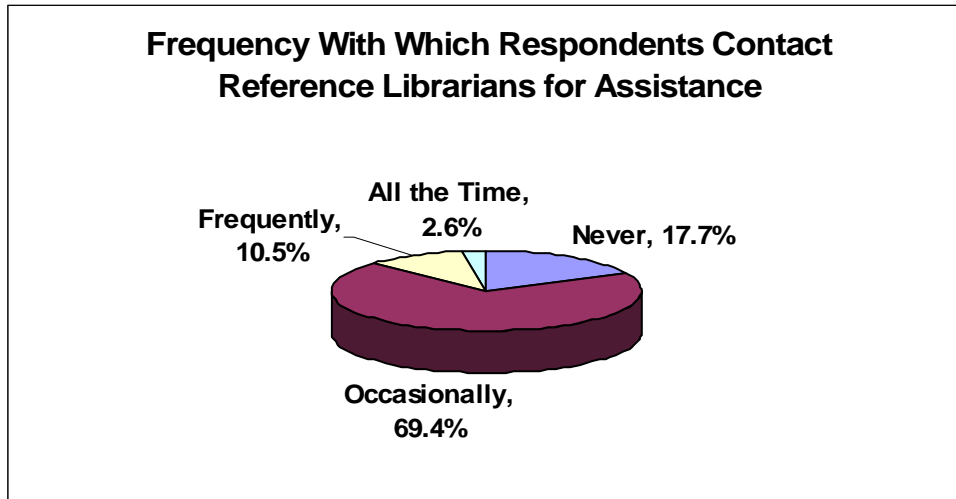
Reservations and loan requests were most frequently made online, though approximately half of respondents make them in person at the library as well. A small but significant number (approximately 10%) make their requests by telephone, as shown in Figure 5-10.

**Figure 5-10
Respondents' Means of Making Reservations of Requesting Interlibrary Loan**



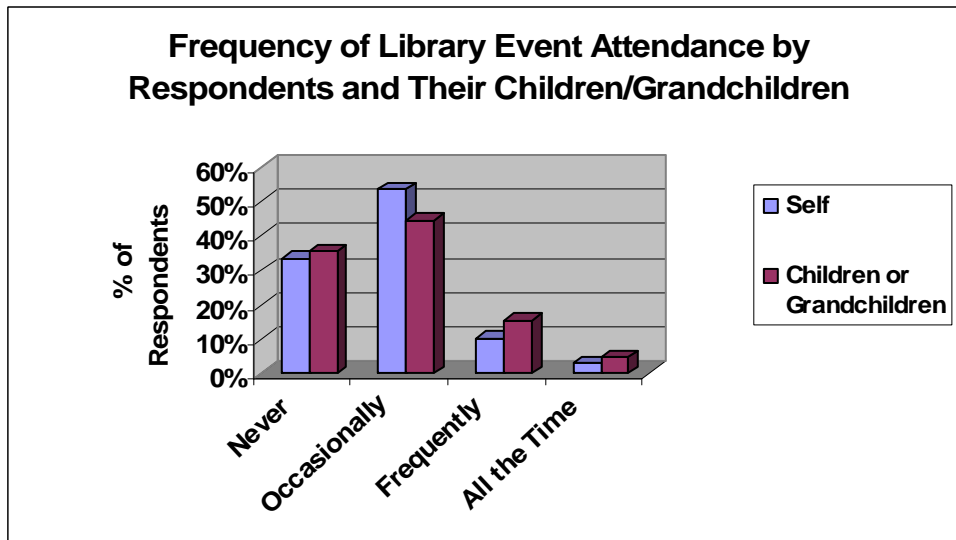
A majority of respondents (82.5%) contact reference librarians for assistance, and a significant majority of them (88.4%) do so in person. More than a third (37.4%) of respondents report contacting reference librarians by telephone, while a mere 13.2% seek assistance via e-mail or online chat. Figure 5-11 below summarizes the survey data regarding reference librarians.

Figure 5-11
Frequency of Respondents' Contact with Reference Librarian



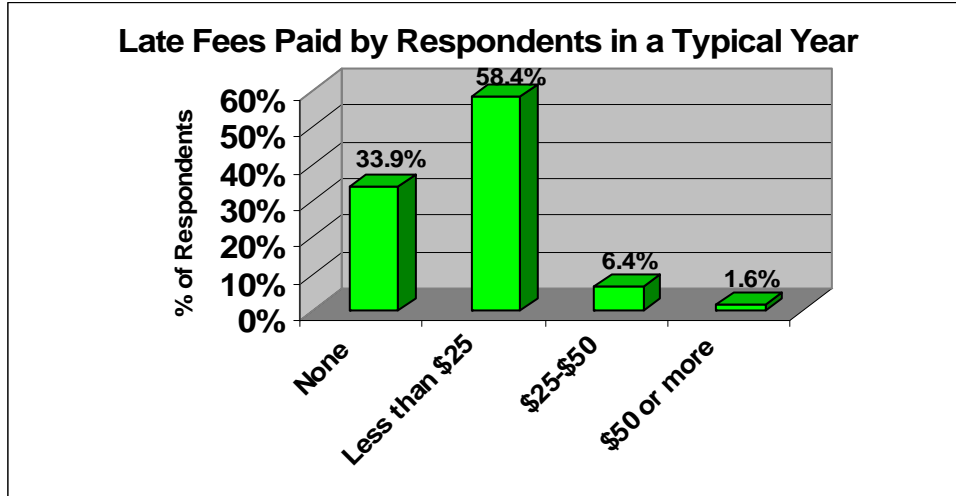
2/3 of respondents attend special events, classes, or programs held at public libraries. More than 1/3 of respondents do not have children or grandchildren. Nearly 2/3 of those who do have them report that their children or grandchildren attend library events, at least occasionally. Data regarding event and program attendance appears in Figure 5-12 below. Data with respect to children or grandchildren reflects the percentage of only those respondents who have children or grandchildren.

Figure 5-12
Frequency of Event Attendance by Respondents and their Children / Grandchildren



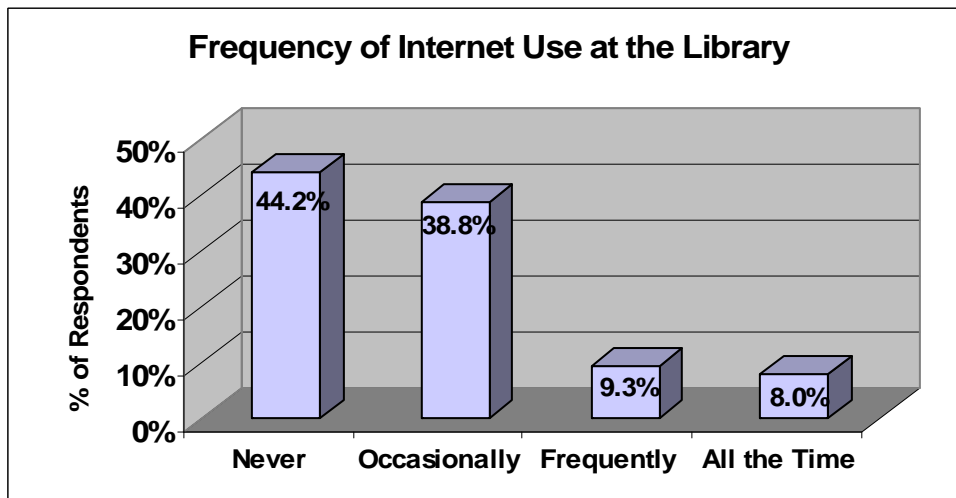
Respondents were asked to report the amount in a typical year that they pay in late fees for failure to return borrowed items on time. Over one-third of all respondents (33.9%) report never paying any late fees. The vast majority of the remaining two-thirds pay less than \$25.00 per year in late fees. 6.4% pay between \$25 and \$50 per year, with only 1.6% paying fees in excess of \$50.00 per year. Late fee data is summarized in Figure 5-13 below.

**Figure 5-13
Late Fees**



Over half of survey respondents (about 56%) access the Internet at the public library, though only about 7% of all respondents are dependent on the library as their only means of access. Data regarding Internet use at the library is summarized in Figure 5-14 below.

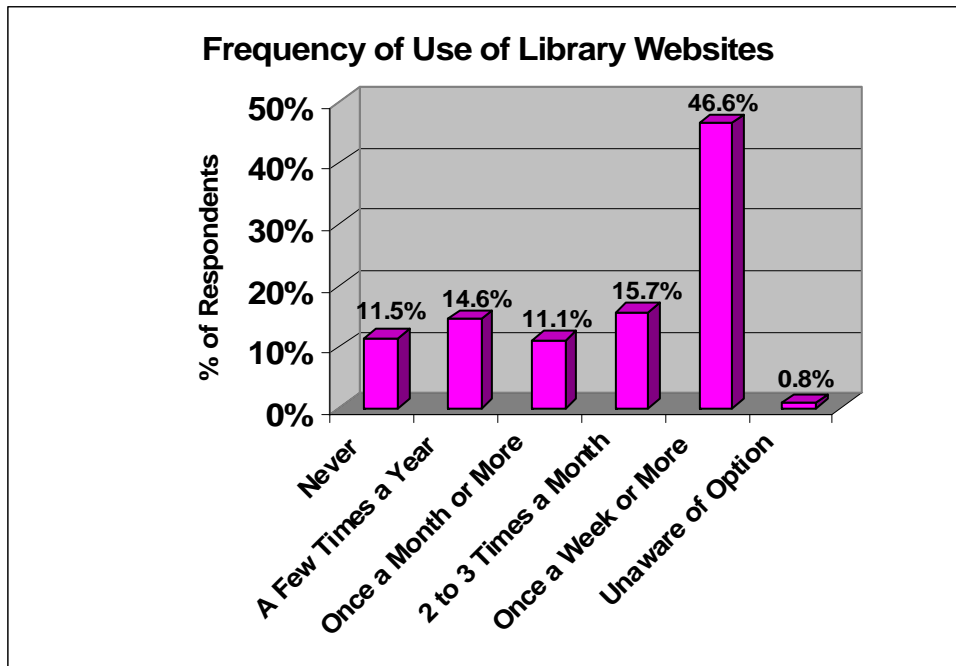
**Figure 5-14
Frequency of Respondents' Use of the Internet at the Public Library**



Survey respondents are nearly as likely to stop at the library on their way to or from another appointment or errand (72%) as they are to go out for the express purpose of visiting the library (79.2%), with numerous respondents responding that they are likely to do both. About 31% of respondents indicated that when visiting the public library, they are likely to stop at nearby businesses that they would probably not have shopped at otherwise. Errands such as going to the bank and post office, as well as stopping for purchases such as groceries and gasoline were among the most frequently reported stops. Respondents were asked how much they typically spend on these stops. Although this spending cannot reasonably be included in an economic impact calculation (as the users would certainly have bought their gasoline and groceries at other establishments in the state regardless), it is worth noting that particular establishments enjoy increased business as a result of their proximity to the library. Of those respondents who reported an amount spent on side trips to other businesses, the average amount reported was \$24.63 spent on stops that they would not have made but for their trip to the library.

As noted above, a significant majority of respondents reported accessing the library online. The frequency with which they do so is illustrated in Figure 5-15 below.

Figure 5-15
Frequency of Respondents' Use of Public Library Websites



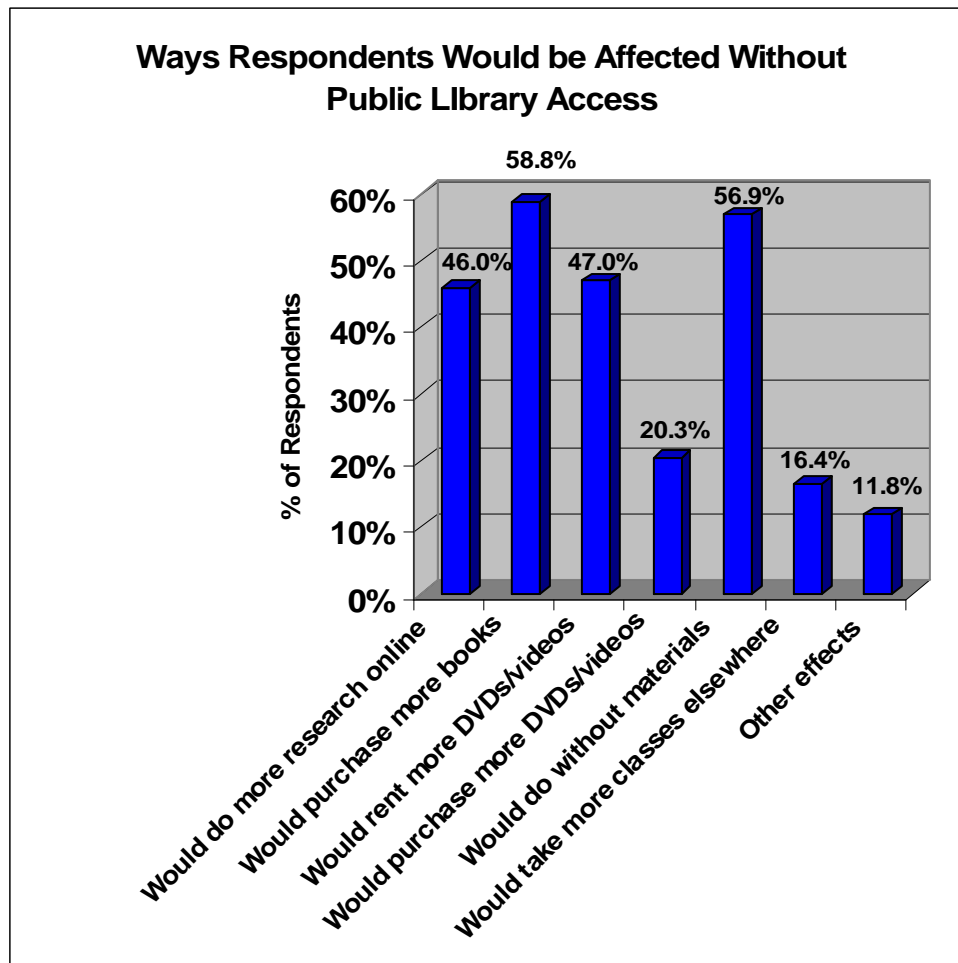
Library Alternatives

Respondents were asked about a number of ways that their lives would be affected if they did not have access to a public library. Specifically, respondents were asked to estimate the amount they would spend if they had to pay for the same services elsewhere by purchasing or renting materials they currently have the option of borrowing from the library. While over half of all respondents reported that they would do without at least

some of the materials that they typically borrow, approximately the same number indicated that they would purchase more books and periodicals if they did not have the option of borrowing them from the library. Nearly half indicated that they would rent more DVDs and videos, and do more research online. A smaller but significant percentage of respondents indicated that they would purchase more DVDs and videos, and attend more classes and programs elsewhere. Although this section of the survey was designed specifically to address the financial ramifications of the theoretical absence of public libraries, respondents were also invited to offer comments with respect to other ways their lives would be affected. Approximately 10% of respondents offered comments, indicating that their lives would be negatively affected in any number of ways beyond the issue of incurring additional expenses. Many respondents noted that they would be upset or unhappy, that they would borrow materials from friends and family, that they would work to establish a library in their community, or that they would travel as far as they had to in order to find another library.

Responses are summarized in Figure 5-16 below.

**Figure 5-16
Potential Effects of Lack of Public Library Access**



Respondents were asked how much money they save as a result of being able to borrow items from the library and attend classes and programs there as opposed to having to purchase or rent items, or pay to enroll in classes elsewhere. On average, respondents who answered those questions reported saving over \$200 per month. Their responses are summarized in Figure 5-17 below.

Figure 5-17
Average Monthly Amount Saved by Borrowing Materials from the Public Library⁴

LIBRARY ALTERNATIVE:	AMOUNT SAVED PER MONTH:
Buying Books and Periodicals	\$104.81
Renting DVDs and Videos	\$36.03
Buying DVDs and Videos	\$46.56
Attending Events Elsewhere	\$17.68
TOTAL SAVED:	\$205.08

Attitude Toward Public Libraries

Respondents were surveyed about their attitude toward public libraries and the extent to which they value the presence of public libraries in their communities. Almost all respondents felt that public libraries contribute in a meaningful way to the quality of life in their community, and that funding public libraries was a good use of tax revenue. These results are not surprising, inasmuch as the overwhelming number of survey respondents were regular library users. However, a recent statewide survey⁵ of Wisconsin residents, which was prepared for the Wisconsin Public Library Consortium⁶ (WPLC) included a random representative sample of both library users and non-users indicates that even among the population as a whole, the vast majority of Wisconsin residents value their public libraries, as summarized in Figures 5-18 and 5-19 below⁷. Although the number of respondents who "strongly" agreed was higher among the NorthStar survey, which included fewer non-library users than the WPLC survey, more than 85% of respondents to both surveys agreed that libraries enhance quality of life, and support funding libraries with their tax dollars.

⁴ A small number of respondents reported exceptionally high figures with respect to the amount they would spend. To ensure a more reliable response that is indicative of the average respondents, the outliers consisting of the top and bottom 1% of reported figures were removed before calculating the averages.

⁵ *The Wisconsin Library User (and Non-User) II: Outcomes of a Second Statewide Survey (2003-2007 comparisons)*, June 2007, Morrill Solutions Research

⁶ <http://www.wplc.info>

⁷ Note that the questions in the two surveys - while analogous - differed to some degree. The WPLC data in Figure 5-17 represents responses to the question: "Public libraries enhance my quality of life", while the question in the NorthStar survey was "I feel that the public library contributes in a meaningful way to the quality of life in my community." Both surveys inquired about tax implications, but while the NorthStar survey asked "Funding public libraries is a good use of a portion of my tax dollars", the WPLC survey inquired "'I would support a referendum that would increase funding for my public library.'" "No Opinion" was not an option for either question in the WPLC survey.

Figure 5-18
Respondents Who Agree that Public Libraries Enhance Their Quality of Life

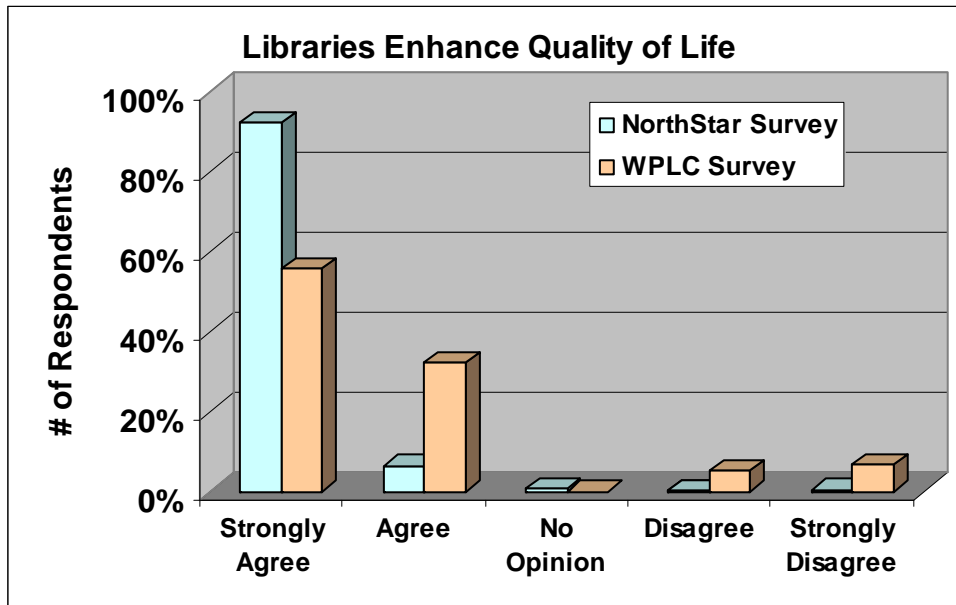
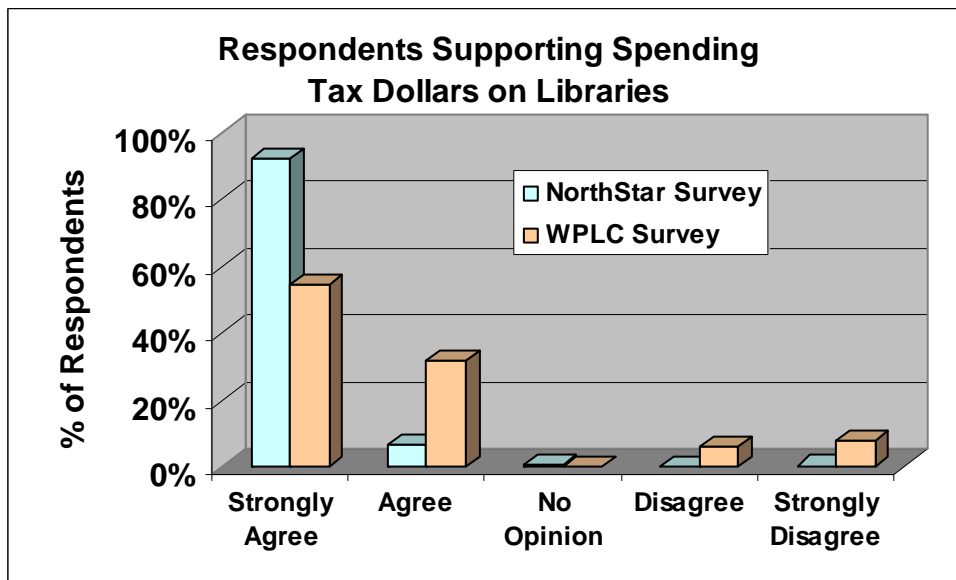
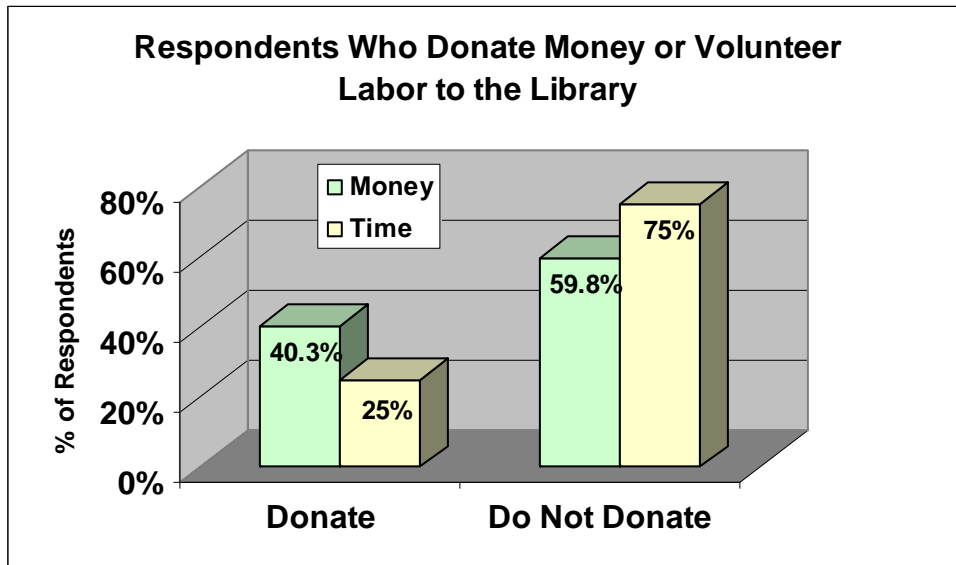


Figure 5-19
Respondents Who Agree that Funding Public Libraries is a Good Use of Tax Revenue



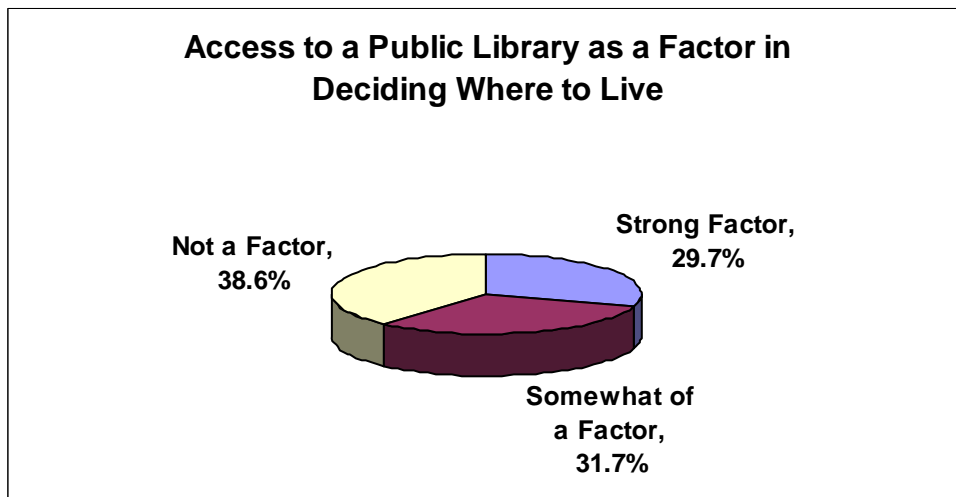
Respondents were asked whether they typically donate their time or money to public libraries, Friends of the Library groups, or Library Foundations. Although a majority of respondents (nearly 57%) do neither, users are more likely to make a monetary donation than volunteer their time, as indicated in Figure 5-20 below. The average annual donation reported was \$130.07, while the average amount of volunteer time reported was 66.68 hours per year, or about an hour and a quarter per week.

Figure 5-20
Donations of Time and Money to the Library



A majority of respondents (about 61%) indicated that access to a public library was at least somewhat of a factor in choosing their place of residence, with about half that number indicating it was a strong factor. The remainder of respondents indicated that library access was not a factor in deciding where to live, though several people noted that they were happy to be near a library, or that they considered it "a bonus", even if it was not a factor in their decision. Data are revealed in Figure 5-21 below.

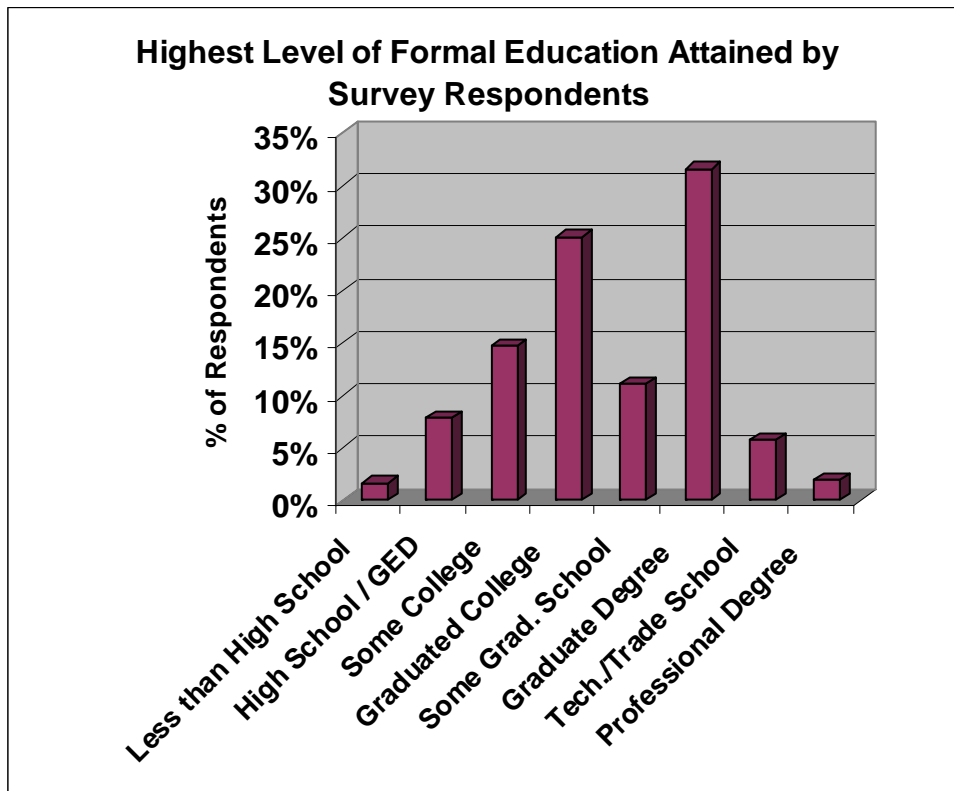
Figure 5-21
Access to a Public Library as a Factor in Deciding Where to Live



Demographic Information

Finally, respondents were asked for demographic information. Not surprisingly, some respondents, despite an assurance of anonymity, were reluctant to reveal their age or household income. Nevertheless, a sufficient number of respondents (about 90%) answered the questions, which provides valuable insight into the clientele served by public libraries all over the state. 48 was the average age reported. Nearly 4 out of 5 (78.3%) respondents were women, and about 70% were married. Respondents covered the entire spectrum of educational attainment, though holders of graduate degrees represented the single largest cohort. An impressive third of all respondents have attained a graduate or professional degree, and fully three-quarters have graduated college, as indicated in Figure 5-22 below.

Figure 5-22
Educational Attainment of Survey Respondents



As with educational attainment, a wide range of income levels were represented among respondents. Household income levels are reported in Figure 5-23 below. The results of the current survey were similar to the results of the WPLC survey covering both library users and non-users, suggesting that household income for regular library users does not differ dramatically from that of the general state population, which has median household income of \$48,772⁸. The vast majority of respondents (87.8%) are homeowners (or

⁸ Median household income is reported in 2006 inflation-adjusted dollars. National median household income for 2006 was \$48,451. Source: United States Census Bureau, American Community Survey for 2006.

members of a privately owned household). Residential status is indicated in Figure 5-24 below.

Figure 5-23
Household Income of Survey Respondents

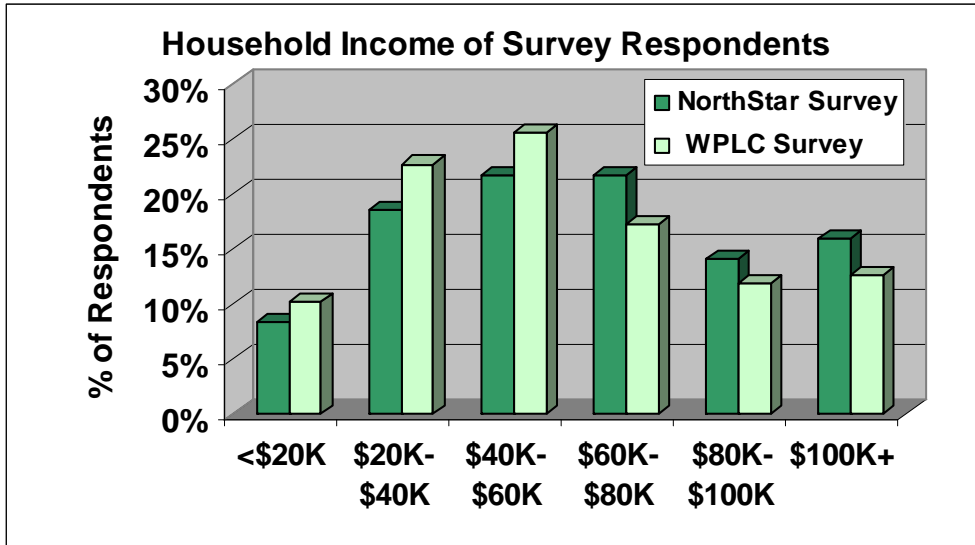
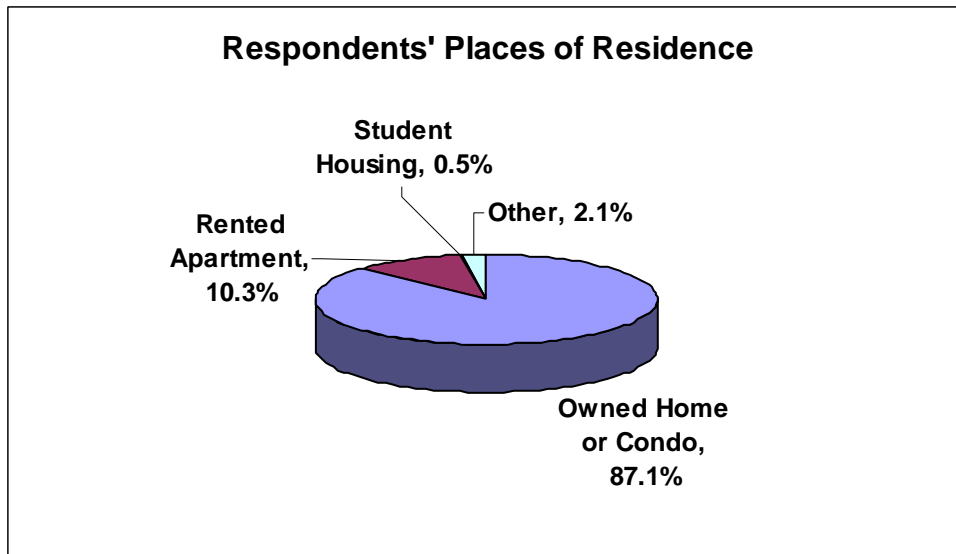


Figure 5-24
Residential Status of Survey Respondents



This information reveals quite a bit about the average library user. Although both genders, all ages, income brackets and educational levels are represented, the typical Wisconsin public library user is a well-educated middle-aged woman living in her own home, with household income of approximately \$60,000.

CHAPTER 6:

SWOT / GAP ANALYSIS AND THE RELATIVE VALUE OF LIBRARIES IN A KNOWLEDGE ECONOMY

SWOT / Gap Analysis

A basic step in evaluating the role of any institution or organization with respect to economic development is to assess its strengths, weaknesses, and opportunities, as well as threats to its development. This process is commonly referred to as a SWOT analysis. We have also included a discussion of services or resources which are missing altogether, commonly referred to as a gap analysis.

The SWOT analysis is a process used to assess the challenges and strategies for economic development. A SWOT analysis can be used as a framework to gather public input and to engage the public in thinking about the current economic condition and the economic opportunities for the future. The analysis with respect to Wisconsin public libraries asks five basic questions:

- What are the most important strengths, contributions or benefits of public libraries to each community or region?
- What are the biggest challenges to or weaknesses of public libraries in each community or region?
- What are the major threats to the future operations of public libraries in each community or region?
- How can libraries best contribute to the future economic development and quality of life in each community or region?
- Are there any services or resources currently missing (gaps) that would help to improve the function and value of public libraries in each community or region?

In completing this assessment, focus group sessions were held in each library system in the state. A large amount of information was obtained through public input as the consultants conducted 29 focus group sessions, interviewing more than 200 people in the process. For focus group dates and locations, see Appendix 2.

Other sources of information for the SWOT analysis included Wisconsin Public Library Service Data, other published studies, demographic and statistical data obtained from government sources such as the Census Bureau, the Bureau of Labor Statistics, and the Bureau of Economic Analysis.

Based upon these data sources, the following represent a summary of the major points with regard to strengths, weaknesses, opportunities, and threats related to Wisconsin public libraries.

Strengths

Focus group participants identified numerous strengths of public libraries in their communities. Mentioned most frequently were free access to a wide range of materials, the fact that libraries are a community hub or gathering place where everyone is welcome, and that they provide resources to those who would otherwise be unable to afford them. A summary of responses appears below.

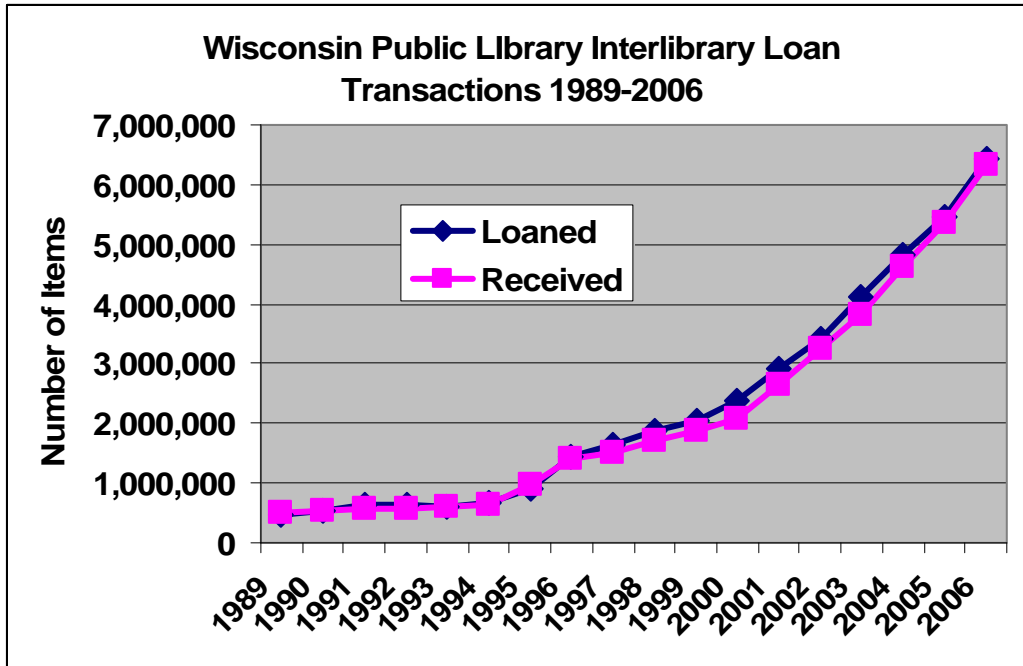
- Wealth of resources and materials available (books and periodicals, educational materials, professional journals, travel resources, audiobooks, DVDs, videos, music, and other materials for entertainment purposes, historical collections, materials and information for entrepreneurs)
- Services (interlibrary loan, classes and special programs, availability of home delivery, services for the disabled, assistance with resumes and job searches, tax forms, children's programs, bookmobiles)
- Mission (encourages young people to read, constantly growing collection of resources and materials, everyone welcome, literacy programs, free service)
- Technology (computers and Internet access, specialized equipment for the disabled, online content, specialized databases, only means of access for lower income families and individuals)
- Community gathering place ("living room" experience, meeting and conference rooms available, all-inclusive, safe and friendly environment, unique forum for social networking, book clubs and reading groups, quality of life issue)
- Staff (knowledgeable reference librarians and staff, class instructors, volunteers, people committed to maintaining the library)

Analysis

Focus group participants had no problem identifying strength of libraries. The primary strengths of public libraries are those aspects that make them unique institutions. Public libraries stand alone with respect to two important factors: supplying a large collection of materials, and doing so at no direct cost to consumers. Of course, libraries are subsidized by tax revenue, but everyone has access to library materials regardless of whether they pay property taxes, and without having to pay any fee or cost to rent the materials. Even as the addition of computers and work stations, and providing for meeting space for events and programs compromises the amount of physical space for collections of books and periodicals, the ability to borrow materials from other library facilities all over the state through the interlibrary loan program, and the increasing availability of online content and digital media means that there is more material available for checkout all the time. Even the wealthiest consumers are unlikely to purchase as many materials and resources as are available to them at the library.

The availability of so many resources allows the public to review and enjoy a wide variety of materials for both educational and entertainment purposes, including many specialized materials they may have difficulty locating elsewhere. Library users have increasingly been able to borrow materials from other libraries through the interlibrary loan program. Figure 6-1 below illustrates the growth in use of the interlibrary loan program from 1989, when only about half a million volumes were loaned or received, to 2006 when that number had grown to more than 6 million items.

**Figure 6-1
Public Library Usage - Interlibrary Loan**



Source: Wisconsin Public Library Statistics, Wisconsin Department of Public Instruction

The fact that so many materials are not only available, but available to be borrowed without paying a fee is of paramount importance. Many focus group participants noted that libraries "level the playing field." While many people of higher socioeconomic status routinely purchase books, subscribe to periodicals, and conduct their research online without ever visiting a library, many lower income individuals and families do not have that option. 21% of Wisconsin workers earn poverty level wages⁹. Universal access is one of the most important strengths of the library. The availability of resources, technology, and educational opportunities provide everyone with the availability to improve themselves and their life circumstances. Even those patrons in higher income brackets need to prioritize their spending, and the fact is that even those who could afford to purchase more books and materials appreciate having a large collection available for checkout.

⁹ Figure reflects the percent of workers earning a wage that cannot lift a family of four above the poverty level, even with full-time year-round employment. Source: National Center for Children in Poverty, Columbia University Mailman School of Public Health

Technology has become increasingly important, and the issue of a level playing field is particularly important in this regard. Although home computers and Internet service have gotten considerably less expensive in recent years than they were a decade ago, the fact remains that they are still a luxury that a sizeable segment of the population cannot afford. In 2003 (the most recent year for which data¹⁰ is available) 38.2% of Wisconsin households were without computers, and 45.3% of Wisconsin households were without Internet access. What was once a luxury has increasingly become a necessity, as many businesses, organizations, and individuals rely on websites and online resources. Certain job opportunities, events and programs, and other resources are primarily if not exclusively advertised and made available online, and libraries open the door for everyone to enjoy these opportunities even if they would be otherwise unable to afford to do so.

The role of the library as a community gathering place was stressed repeatedly at focus group sessions. Whether discussing concerts, classes, and other events, book clubs and other social groups, or simply a forum where people could come and sit, talk, and read, quite a few people expressed their appreciation that libraries stand alone in many communities as a gathering place. Although many towns also have community centers and parks, Wisconsin winters render such options unavailable a significant amount of the time. Many interviewees place a great deal of importance on the value of a comfortable public library facility where they can gather, especially as opportunities for social interaction have decreased in the wake of more people seeking out services online.

Weaknesses

Although focus group participants were largely enthusiastic about public libraries, a majority of people were able to identify a number of weaknesses or challenges faced by public libraries. By a huge margin, the challenge cited most frequently was funding. Maintaining a physical facility, growing a collection of materials, maintaining a knowledgeable staff, providing computers, internet access and other technology, sponsoring events, classes and programs, all cost money. In every community we visited, interviewees feared losing funding, and consequently facing a diminished level of service, or lamented the inability to offer increased services and resources that additional funding could make possible. The lack of funding is discussed in more detail below as a threat to the future operations of public libraries.

A lack of physical space was mentioned almost as frequently as the funding issue. With the exception of a couple of recently built facilities, participants at every library we visited felt that the lack of physical space compromised the ability of their public library to provide a level of service and range of services that they would like to see. Interviewees held a wide range of opinions with respect to how they'd like to see additional space used. More conference and meeting space, more computers, more reading and workspace, and larger physical collections of books and materials were all mentioned by members of our focus groups. While most people appreciated all that their

¹⁰ U.S. Census Bureau, Current Population Survey, October 2003

libraries had to offer, almost all felt that more could be offered if limited physical space was not an issue.

Discussed in more detail below as a threat, a significant number of interviewees mentioned the Internet and a decline in library use by people who have turned to seeking out information online instead of visiting a public library. According to the recent WPLC survey, nearly two-thirds (64.2%) of people used Google or another Internet search engine to answer a research question at least once in the previous 4 month period, and approximately one-third (33.7%) did so more than 20 times. According to a recent PEW study¹¹, more people turned to the Internet than any other source of information and support, including experts, family members, government agencies, or libraries. According to the PEW study, only 13% went to the public library when they had a research problem to address.

It should be noted that not everyone blamed the Internet for the decline in library use, at least not exclusively. Numerous people cited a concern about declining library use as a challenge, noting in particular that young people seem to have lost interest in using libraries, or never cultivate such an interest in the first place.

Although those concerns were most frequently cited, there were several other issues that came up in our interviews. Weaknesses and challenges cited are summarized below:

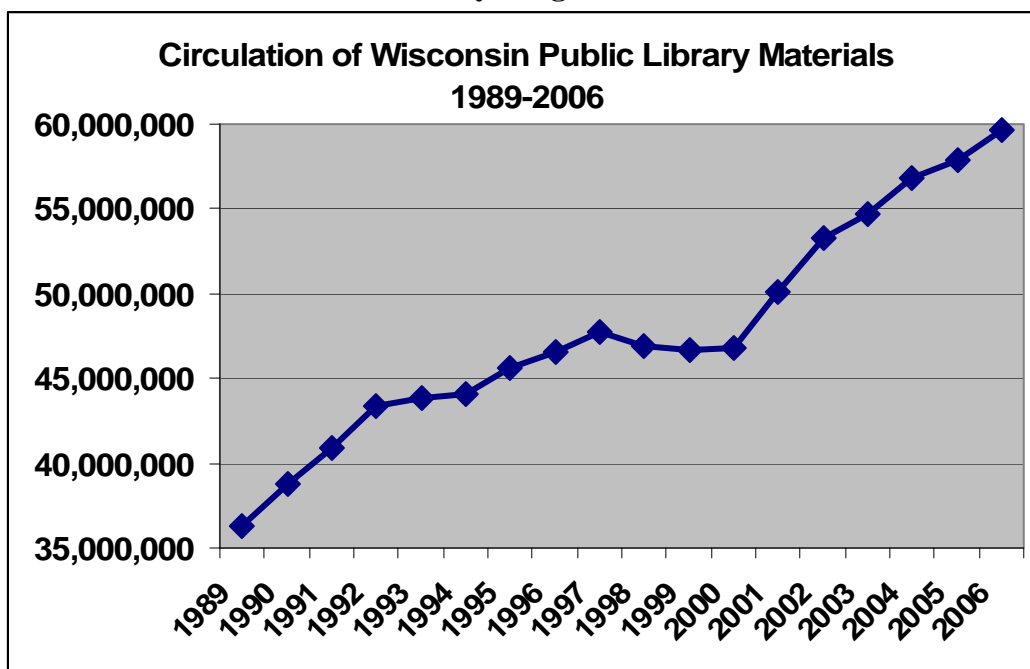
- Funding (lack of funds available for state-of-the-art technology and updated collections and equipment, libraries not a budgetary priority on the part of politicians, government officials and the public)
- Space (not enough room for books and materials, computers, meetings and events, comfortable and inviting reading environment, parking)
- Technology (more people using Internet instead of libraries, libraries can't keep up on current technology, libraries need to expand web-based services, lack of online programming, need better A/V equipment, DVDs and other media damaged)
- Awareness of / Interest in Library Services (not enough marketing and advertising, public unaware of all that the library offers, not enough initiative on the part of libraries to promote themselves, declining interest among the public, people/kids not reading as much as they used to)
- Services (not open long enough hours, not enough collaboration/cooperation with schools, too much staff turnover, not enough classes offered, not enough help with computers and software)

¹¹ *Information Searches That Solve Problems: How people use the internet, libraries, and government agencies when they need help*, PEW / Internet & American Life Project and Graduate School of Library and Information Science, December 30, 2007

Analysis

Public libraries will constantly face the challenge of making smart and effective choices with respect to how best to allocate funds and available space. In order to address the funding issue, libraries may be well served by attacking the problem of the perception of waning interest in and support for libraries. Curiously, the perception on the part of focus group participants that library use is declining is inaccurate, at least on the whole. While it is possible that use at particular library facilities has declined, Wisconsin Public Library Statistics maintained by DPI clearly indicate that circulation of library materials has continued to increase in recent years, as illustrated in Figure 6-2 below. Given that the data shows that library use has in fact increased in recent years, it is imperative to correct the erroneous perception on the part of users that public library use is on the decline. Effective marketing and promotion of library services - and the growing demand for those services - to public officials, potential consumers and donors alike could facilitate raising funds and justifying an increased level of service.

**Figure 6-2
Public Library Usage - Circulation**



Source: Wisconsin Public Library Statistics, Wisconsin Department of Public Instruction

Opportunities

There are a number of opportunities for public libraries to contribute to economic development and quality of life in communities throughout Wisconsin. Wisconsin residents who participated in focus group sessions enthusiastically identified several such opportunities. Quite a few participants felt that public libraries must strive to keep as current and up-to-date as funding will allow, both in terms of making the latest

information and technology available, as well as updating their physical collection of materials and resources available for checkout.

Another concern that came up throughout the state was the need to encourage people to read and to continue recruiting new readers, particularly young readers, through initiatives like the summer reading program. Emphasizing children's programming was one of many suggestions made that does not represent a new idea or initiative, but rather the hope that libraries will remain committed to doing those things that they already do well, including providing classes and educational opportunities, serving as a community gathering destination, and continuing to make materials and technology available to people who would not otherwise be able afford to access them.

There was also a strong sentiment among focus group participants to see libraries develop more collaborative partnerships with schools and universities, social service agencies, non-profit groups and community programs, as well to reach out to the business community for deeper involvement, in the hope that corporations would be willing to support the libraries in their communities both financially as well as by cooperating on programming and volunteering time to establish a working relationship with the libraries and their users.

Focus group participants identified dozens of opportunities, which are summarized below:

- Encourage reading (youth programming, literacy programs)
- Be a community gathering place (continue to welcome everyone; provide an aesthetically pleasing facility; a stress-free environment conducive to studying as well as rooms for meetings and conferences)
- Provide quality programming and educational opportunities (classes in computers and effective Internet use; GED programs; student help - tutoring, mentoring, and help with homework)
- Provide resources (keep technology and hard copy collections up to date; provide specialized materials for professionals and researchers; provide tax forms; maintain community archives and historical records)
- Public outreach and marketing (develop a stronger advertising campaign; keep the public and community businesses apprised of services and resources available as well as upcoming library events; develop partnerships with other organizations, collaborate with local businesses; seek input from staff and users; collaborate with schools, universities, and academic libraries; consider alternative means of disseminating information to reach more people, such as school board newsletters)
- Provide career and employment assistance (classes on resume writing; assistance with searching for job opportunities and filling out applications; instruction on use of applicable websites, etc.)

- Accessibility / Provide for the disenfranchised (keep resources available at no cost for those who would otherwise be unable to afford similar services, offer bilingual materials, emphasize diversity, provide resources and technology for the disabled; consider statewide ID or library card which would allow statewide access, maintain interlibrary loan program; expand library hours; locate in neighborhoods; increase number of locations)
- Staffing and personnel issues (maintain friendly and knowledgeable staff, make reference librarians and materials available as often as possible, make better use of volunteers - make people aware of how they can help, consider appointing a volunteer coordinator at each library)
- Entertainment (arts and cultural events, live music, book discussion groups, computer clubs)
- Economic development (support regional economic initiatives -New North, Grow North, Centergy, Thrive, Momentum Chippewa Valley, M-7, etc.; provide services and research materials for entrepreneurs)
- Online options (continue to expand the number of resources and services available online; maintain and update website on a regular basis; establish user-friendly holds policy)
- Plan for the future (establish forward-thinking vision for libraries and their role; strive to serve their changing demographics and aging clientele; be flexible and open to change)

Analysis

Focus group participants provided a wealth of information and plenty of ideas. It is clear that people all over the state feel that Wisconsin public libraries are already doing many things very well, and feel that in many ways, the best way for libraries to contribute to future economic development and quality of life in the state is simply to continue doing those things that they do so well. Of course, the specifics of each library facility and the materials and services offered vary from one community to another, but generally speaking, Wisconsin public libraries provide free access to a wide range of materials to all segments of the population, and they must continue to do so. Even as libraries must continue to provide these services and materials, they must also continue to change and grow and adapt to the needs of the population, especially by embracing technology and remaining as current possible with respect to computers, the Internet, and the information available beyond what can be housed within their walls.

Focus group participants in particular communities offered specific suggestions which merit serious consideration throughout the state. Inasmuch as the concern over adequate funding is not likely to disappear, it is imperative that libraries seize opportunities to maximize their services while minimizing their cost. A number of people we spoke to were not even aware that they could volunteer at libraries. Reaching out to volunteers and appointing a particular volunteer to coordinate their efforts at each library or system could go a long way toward providing more opportunities for library users and expanding the role of libraries in their respective communities.

Outreach and collaboration is also of paramount importance. Again, as funding is certain to remain an issue, involving other organizations can help boost library use and defray the cost of promotion and marketing. Libraries share an educational mission with a variety of social service, non-profit, and educational institutions. If these organizations encourage their members and clients to use the library, the results would benefit everyone concerned. Business leaders must be made to see that libraries are a quality of life issue which can serve to draw new workers to the region. By hosting events at libraries, corporations can promote their own business, as well as establish themselves as community leaders, which will in turn benefit the libraries as their employees learn more about the resources and services available, and will hopefully become active library users.

Threats

There are several significant threats that stand in the way of Wisconsin public libraries realizing their full economic growth potential. As with weaknesses, the threat most frequently cited by our focus group participants was the concern over adequate funding. As tax-subsidized institutions, libraries are in competition with a multitude of other public institutions and programs for their piece of the budgetary pie. Maintaining current technology, comprehensive collections, and a knowledgeable staff all cost money, and the extent to which libraries can provide these things will always be limited by the funding available.

Another concern raised at almost every focus group session was a lack of adequate physical space. Library users expect to be able to find the latest books and materials on the shelves, and adding to the collection requires more space. At the same time, much of the space that was once devoted to housing the physical collection must now be devoted to providing computers and Internet access. Providing a sufficient number of computer work stations to allow several users to use computers at the same time requires a significant amount of space. Also, if public libraries are to maintain their role as community hubs, they need ample space for people to sit and read, as well as conference rooms for special events, meetings, and community gatherings.

The other concern raised most often was the threat represented by the Internet. As more and more information is available online, many people who used to turn to the library for answers now simply stay home and use Google, Wikipedia, or other online resources to find what they are looking for. Many focus group participants were quick to point out that the library remains a more reliable source of accurate information than some of the information that can be found on websites like Wikipedia. Nevertheless, it is the perception on the part of many people that any information they require can be found online that represents the threat to public libraries. This threat can be minimized by continuing to make the Internet available at the library. In the PEW study, of the people who reported going to the library to solve a problem, 65% said that access to computers, particularly the Internet, was the key reason they go to the library for help. 62% of the people who went to the library for help actually used the computers at the library.¹²

¹² PEW/Internet study, Summary Page vi.

As a related issue, recent years have seen an explosion in more affordable media and on-demand entertainment options available to consumers in the home, not only online, but through cable and satellite television, as well as cellular telephones and other electronic devices.

Although other concerns were not raised with the same frequency, focus group participants did identify a number of other potential threats, including:

- Keeping up with technology
- Poor public relations - lack of awareness among the general public of all the library has to offer
- Attitude of local government/officials
- Competition with other cultural opportunities and institutions for peoples' time and attention
- Facility maintenance (ADA compliance, etc.)

Analysis

Many of the concerns that were raised - keeping up with technology, maintaining an adequate library facility, etc. - are directly related to the funding issue. Given the myriad ways in which services could be expanded, the real challenge is to prioritize the needs and to allocate the available funds in the most efficient and practical manner.

The Internet represents both an opportunity and a threat. Given the ubiquity and convenience of the Internet, it is likely that some people will continue to seek information online rather than going to the public library for information. Public libraries can best combat this threat by continuing to expand their own web presence, and using the Internet as a vehicle for recruiting new users, promoting their value and spreading the word about the services they provide.

Wisconsin public libraries have already shown a great deal of initiative combating the physical space issue. Many libraries throughout the state have been either completely rebuilt or substantially remodeled within the last decade. Nevertheless, it remains one of the primary concerns raised by library users. Public libraries face a significant challenge in setting priorities with respect to allocation of the available space. Libraries must accept the challenge of their changing role in the New Economy. What was once primarily an issue of housing a diverse collection of materials has now increasingly become an issue of making room for technology and providing sufficient space for the facility to be effectively used as a community hub, in addition to maintaining a comprehensive collection.

Finally, the issue of the perception of waning public support must be explored. As noted above, public library use in Wisconsin has actually continued to increase in recent years. Nevertheless, a contrary perception among interviewees was common. A majority of focus group participants were enthusiastic library users, many of whom lamented what

The Economic Contribution of Wisconsin Public Libraries

they perceived as a decline in library usage, particularly by young adults, and a lack of awareness among the public about the services available through the library. Wisconsin public libraries provide very valuable services, but a lot of respondents felt that too many people don't know about them, don't appreciate them, and simply don't use them. Combating this threat is essential for the survival of public libraries in the New Economy.

Gaps and Barriers to Improving the Value of Public Libraries in the Future

In expansion of the traditional SWOT analysis, focus group participants were asked not only about weaknesses and threats, but whether there are services or resources that are missing altogether. While some redundancy with previous responses is to be anticipated, participants did identify a number of resources or services which were missing, as opposed to merely weak.

One of the primary concerns raised was the lack of an effective marketing campaign. Although some libraries are featured in regular columns in local newspapers, and events and programs are advertised with varying degrees of success, what is missing is a more focused initiative to "sell" the public on the value of libraries. As noted above, many people simply don't use public libraries. Many non-users could become users and supporters of the public library if they were more aggressively recruited. Of course, many forms of advertising cost money, which may be prohibitive in light of the constraints on library finances, but by partnering with a variety of organizations who have a vested interest in the educational mission of the library, it may be possible to spread the word about library services and events in a cost-effective manner, which could help sustain libraries in the future as more people in the state become regular library users.

Libraries in the Knowledge Economy / New Economy

In addition to assessing strengths, weaknesses, opportunities, threats and gaps, focus group participants were asked to explore the role of Wisconsin public libraries in the New Economy. While "New Economy" is a term and concept that was familiar to many focus group participants, some required explanation. The New Economy is an increasingly global economy in which businesses compete and communicate in a worldwide marketplace. High-technology and information-based goods and services are dominating today's economy. Businesses must take advantage of technological advances in order to survive and thrive in the New Economy. There is increasing value placed on knowledge and information. The ability to effectively organize and communicate that knowledge and information is of paramount importance to the success of a New Economy business. Knowledge-based and high-technology businesses have more potential for growth and value gains than businesses rooted in tangible assets and production of goods. It was our intention to explore to which these same trends apply to Wisconsin public libraries. As libraries have always been repositories of information, it seems intuitive that as institutions, public libraries would be particularly affected by the shift into the New Economy. Focus group participants were asked for their perspective on several related issues. First:

Do you think that public libraries are more or less important in our modern economy (sometimes called the Knowledge Economy or New Economy)? Why?

Focus group attendees expressed a range of opinions, though most cited the same issue: the Internet. Interestingly, the increasing availability of online content lead some to conclude that libraries are less important than they used to be in light of the ubiquity of the Internet, while others felt that libraries were more important as a result. On the one hand, the argument can be made that libraries are less important because they are simply not being used as much anymore, as more people seek answers online instead of consulting their local library. There are simply more resources available now for people to conduct research and gather information. However, many participants felt that the increase in online content has made libraries more important than ever, as they can serve as a filter and an authoritative information source, separating out much of the unverified and unreliable information available online from that whose accuracy can be relied upon.

It should also be noted that a number of interviewees felt so strongly about the role of libraries in their life that they were uncomfortable characterizing the level of importance as "more" or "less", simply noting that public libraries have always been very important to them, and that relative importance has not changed as a result of the New Economy or the resultant changes in information technology.

Next, focus group participants were asked:

Do you think public libraries will be more or less important to the future (5-10 years from now) economy in the State of Wisconsin? Why?

Although a number of attendees expressed concern that libraries *could* become less important, many remained optimistic that libraries would remain at least as important, if not more so. Many interviewees discussed this question in the context of the SWOT analysis, noting that their answer was dependent upon a prediction with respect to how libraries face the challenges and threats discussed earlier. If libraries effectively build on their strengths and seize opportunities for further development, while effectively combating the threats and challenges they face, they have the potential to cement their position as important institutions. If not, they face the possibility of losing relevance in the future.

As noted above many people felt that the importance of libraries is a constant, and will simply remain important - at least to them - regardless of overall trends among the public or changes in technology.

Next, focus group participants were asked:

In your current occupation or in your current life, is information or knowledge more or less important compared to five years ago?

The vast majority of focus group attendees felt that information was more important, or at least as important as it was in their lives five years ago. As the people we interviewed tended to be very intelligent and concerned with acquiring knowledge, some were uncomfortable characterizing information or knowledge as more important than it used to be, inasmuch as they always felt that it was of paramount importance. Nevertheless, a majority of people indicated that they felt information and knowledge was increasingly important, in light of the fact that more and more information is available all the time. The amount of information available for consumption has increased exponentially in recent years, due not only to the explosion in the amount of information available digitally and through new media, but also to the increasing ease of accessing online content through a broader range of devices, including PDAs and cellular telephones, in addition to the more traditional computer access.

Ironically, it is that same trend of the increasing availability of information that caused some people to characterize information or knowledge as less important to them than it used to be. In light of the overwhelming amount of information now available, some interviewees felt that quantity dwarfed quality, and without adequate filters for identifying the truly important information, information has become less important to them. Of course, focus group participants came from a variety of different life situations and career paths, and some people indicated that information was less important simply because they were retired and no longer affected by the demands for new information previously placed on them by their former professional circumstances.

Finally, focus group participants were asked:

Should libraries be in the business of educating people about and providing people and businesses with access to new information sources and technologies?

A majority of people who participated in focus group sessions concurred that libraries should be in the business of providing education and information regarding new information sources and technologies. A number of people noted that the question was in fact consistent with or analogous to the mission statement of the public library. However, several attendees felt the need to comment on the inclusion of businesses in the question. The consensus among interviewees was that the primary function of public libraries is to serve the individuals in their respective communities, and that concerns of individuals ought to take precedence over concerns of businesses. That said, several participants offered a counterpoint to that position - that corporate entities have the greatest capacity and financial ability to afford state-of-the-art technology, and that the library ought to continue to provide all of the relevant information that it can, so that if there are new information sources that they are unable to provide directly, they can serve

as a useful resource for those who can do so to conduct research and obtain the most current information regarding the available technology.

Although they were clearly the minority, there were those focus group participants who disagreed that the role of the public library should be to provide education and information regarding new information sources and technologies. In most cases, people who held this point of view focused on the issue of funding, feeling that as underfunded, publicly subsidized institutions, it was simply not fair or reasonable to expect public libraries to keep current and up-to-date on new information sources and technologies, especially as information technology advances so rapidly in the New Economy. While nearly everyone agreed that it has become increasingly important for libraries to provide access to the Internet (which of course can be used to research new sources of information and technology), many people felt that providing the new sources of information and technology itself was beyond the scope of what public libraries can afford to provide.

CHAPTER 7:

METHODOLOGY

This chapter provides additional detail on the methodology and sources of information for each chapter of the report.

Chapter 1

Page 5 – The data in the last paragraph describing the library sector in the State of Wisconsin was drawn from *2006 Wisconsin Public Library Service Data*. This report can be accessed online at <http://www.dpi.wi.gov/pld/dm-lib-stat.html>.

Pages 6-7 – The library study summaries are drawn from the executive summaries or the full report on the economic impact of public libraries in the selected states. These reports may be accessed through links on the DPI website at <http://www.dpi.wi.gov/pld/dm-lib-stat.html>.

Chapter 2

Figures 2-1 and 2-2 – The data in these figures come from the *2006 Wisconsin Public Library Service Data*, Table 1, State Totals

Figure 2-3 – The economic impact of spending on library operations is derived by eliminating out of state spending such as a percentage of the spending on collections and multiplying that net in-state spending by a statewide economic multiplier for Wisconsin that is supplied by Minnesota IMPLAN Group (MIG), an econometric modeling firm located in Stillwater, MN.

The same methodology is applied to staff payroll spending. Income tax and Social Security tax withholding is deducted from payroll and a small percentage of leakage for out of state spending is deducted. The net payroll spending is then multiplied by the appropriate MIG economic multiplier to calculate economic impact.

The calculation for visitor spending is based upon prior studies at the University of Wisconsin Madison and the University of Wisconsin Oshkosh. Business visitors including vendors and service technicians and spending for visitors to staff families are calculated and multiplied by the appropriate IMPLAN multiplier to calculate the economic impact of visitor spending.

Figure 2-4 - IMPLAN also provides employment multipliers that are used to calculate jobs created based upon the categories of economic impact shown in Figure 2-3.

Figure 2-5 - State income and sales taxes are calculated based upon the basic model used by the Wisconsin Department of Revenue. A portion of spending is subject to the state sales tax at a rate of 5% and the earnings from direct employment and jobs generated by

the economic activity of public libraries is subject to the state income tax. Property taxes are estimated based upon prior studies in Wisconsin that survey employees about homeownership and property taxes paid.

Chapter 3

Children's Materials - The value of children's materials- the value of circulation of children's materials is based upon the average 2006 price for children's books as reported in Bowker's *Books in Print* discounted by 80%. This leaves a residual used book price of 20% of the new book price. Values for audio and visual materials are derived from online used materials prices and prices of commercial operations such as Blockbusters. Circulation of these materials is assumed to be in proportion to the library holding of each category and weighted cost of children's material is calculated. Circulation is then multiplied by the resulting per transaction figure (\$4.40) to get the total value of the circulation of children's materials which is \$91,682,294.

Adult Materials - The value of adult materials follows the same methodology for children's materials. The weighted average value per adult transaction is \$7.33 and this is multiplied times the adult circulation number in 2006 to derive the total value of \$272,997,164.

Reference Transactions – Most of the methodology for determining the value of a reference transaction explained in Chapter 3. The use of an average statewide wage for librarians is more conservative than some studies and more liberal than the South Carolina study.

Computer/Internet Access – The basic methodology for calculating the value of computer and internet access is explained in Chapter 3. This methodology differs from that used in most of the library studies summarized in Chapter 1. The market prices to own and operate computers were drawn from private groups such as the Gartner Group and from input of chief information officers at two university systems.

Children's Programs – The value of children's programs is determined by taking total attendance and multiplying by a market price proxy for the value of a typical program. The market proxy was gathered from prior studies such as the Indiana study and further confirmed by a brief survey of children's programs offered in Wisconsin.

Adult Programs – The value of adult programs was determined following the methodology used for children's programs.

Chapter 4

Figure 4-1 and 4-2 – These tables are drawn respectively from Chapters 2 and 3 of this report.

Figure 4-3 – The total economic contribution or impact is the sum of the totals shown in Figures 4-1 and 4-2.

Figure 4-4 - The return on investment calculation is calculated by dividing the total 2006 economic contribution of public libraries (\$753,699,545) by the 2006 total population of the State of Wisconsin (5,617,744) to calculate a per capita economic contribution (\$134.16) or benefit. The per capita economic contribution is then divided by the public tax support per capita (\$33.07) to get the return on investment of \$4.06 per tax dollar of support.

Chapter 5

The data in Chapter 5 come from a survey questionnaire that was distributed in hard copy to a selected number of libraries and was also available online.

Survey Questionnaire

A survey questionnaire was designed to gather input regarding library use all over the state. Survey respondents were asked questions in a variety of categories:

- Library Use
- Library Alternatives
- Attitude about Public Libraries
- Demographic Information (zip code, age, gender, marital status, household income, educational attainment, home ownership)

The questionnaire was reviewed by the project steering committee and edited in accordance with feedback received. Once the questionnaire was finalized, it was distributed both online, and in hard copy form. Packets of hard copies were distributed to selected libraries in each system, and also brought to focus group sessions. In addition, the online survey was widely advertised through libraries and other distribution lists.

Chapter 6

The state of Wisconsin has been divided into seventeen public library systems, each serving a different geographic region of the state.

Wisconsin Public Library Service Data for 2005 was examined to determine the service population for each library system. Focus group sessions were scheduled, with the number of sessions corresponding proportionately to the service population of each system. A minimum of one group interview session was held in each system with a population of fewer than 300,000 people, at least two sessions in each system with a population between 300,000 and 600,000 people, at least three sessions in each system with a population between 600,000 and 900,000 people, and at least four sessions in the system containing more than 900,000 people. This resulted in a total of no fewer than 27 group interview sessions, proportionately spread across the entire state as follows:

Figure 6-1
Focus Group Distribution

Library System	Service Population	Interview Sessions
Arrowhead	157,000	1
Eastern Shores	201,671	1
Indianhead Federated	445,208	2
Kenosha County	158,219	1
Lakeshores	280,513	1
Manitowoc-Calumet	117,058	1
Mid-Wisconsin Federated	308,892	2
Milwaukee County Federated	939,099	4
Nicolet Federated	427,262	2
Northern Waters	156,266	1
Outagamie Waupaca	234,332	1
South Central	777,317	3
Southwest	126,451	1
Waukesha County Federated	377,384	2
Winding Rivers	270,813	1
Winnefox	319,931	2
Wisconsin Valley	283,341	1
TOTAL	5,580,757	27

In fact, a total of 29 sessions were held, including additional sessions in Madison and Appleton. Over 200 people participated in these interview sessions. Scheduling group interview sessions according to this proportional scheme was designed to ensure a representative sample with respect to the geographic distribution of the overall population. To ensure a representative sample with respect to users, non-users, and organizations, library system directors were asked to arrange for interview participants representing a cross-section of the community, although it was expected that library users would represent the majority of interview respondents. See Appendix 2 for guidelines issued to directors to assist with the arrangement of focus group sessions. In some instances, additional members of the community, such as Chambers of Commerce and school districts were contacted to participate in sessions as well.

To insure uniformity of input, an interview script was followed at each focus group session. Focus group participants were asked for their input regarding the strengths, weaknesses, opportunities and threats facing libraries, as well as the role of public libraries in the New Economy era. The interview script appears in Appendix 3.

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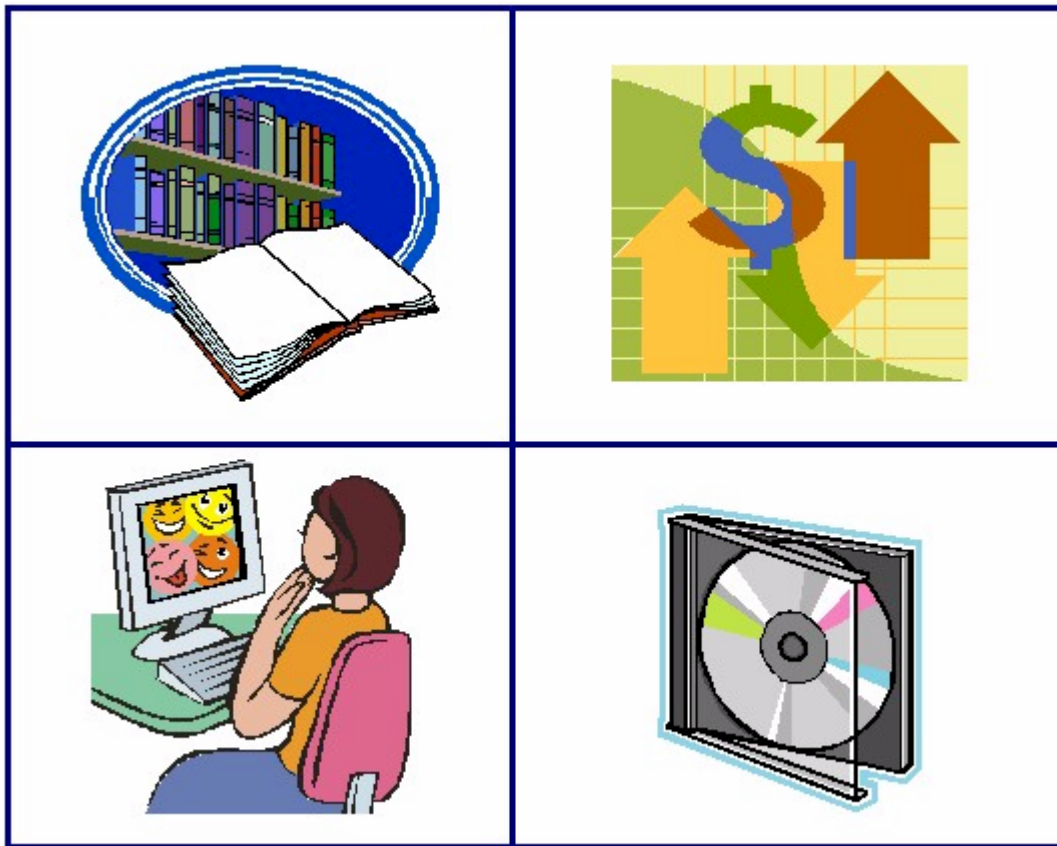
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THE ECONOMIC IMPACT OF THE WISCONSIN PUBLIC LIBRARY SYSTEM



SURVEY QUESTIONNAIRE



PREFACE

NorthStar Economics, Inc. has been retained by the Wisconsin Department of Public Instruction to study the economic impact of public libraries in Wisconsin. To gather information for the study, we are interviewing a representative sample of library users and non-users throughout the state, as well as gathering additional input through this survey. We appreciate your time in filling out this survey. There are no right or wrong answers to the survey. Please answer all questions, using your best recollection or estimate in cases where you are uncertain. All answers will be held in the strictest confidence.

If you have a disability which affects your ability to complete the survey, or you have any questions or concerns, please call (608) 441-8060 or e-mail nstar@northstareconomics.com and we would be happy to assist you with responding to the survey.

SECTION 1: PUBLIC LIBRARY USE

1. I use a public library:

Never A few times a year Once a month or more
 Two to three times per month Once a week or more

2. I access the public library (check all that apply):

In person By telephone Via a bookmobile
 Online Other (please specify: _____)

3. I have one or more public library card(s):

Yes (one) Yes (more than one) No

4. Public libraries used (check all that apply):

I typically use the library closest to where I live
(Library or branch name: _____)

I typically use the library closest to where I work or attend school
(Library or branch name: _____)

I typically use other libraries
(Library or branch name(s): _____)

4. (Continued)

I use other libraries because:

Total number of libraries or branches used on a regular basis: _____

5. I typically check out the following materials (check all that apply):

_____ Books _____ Periodicals (newspapers/magazines)

_____ DVDs / Videos _____ Audiobooks on CD or cassette tape

_____ Other (specify: _____)

_____ I don't check out library materials.

6. How many items do you check out on a typical library visit?

_____ None _____ One or two _____ Three or four _____ Five or more

7. I typically check out items for (check all that apply):

_____ Myself (personally) _____ The business or company where I work

_____ My child(ren) _____ Other members of the household

_____ My grandchild(ren) _____ Other (specify: _____)

8. I find that books or other materials that I want to borrow are not in stock or listed in the catalog at my local library.

_____ Never _____ Occasionally _____ Frequently _____ All the time

9. If books or other materials are listed in my library's catalog but are not in stock when I want to borrow them, I make a reservation so that I can borrow the items when they are back in stock:

_____ Never _____ Occasionally _____ Frequently _____ All the time

_____ I was not aware I had that option (Skip to Question 11)

10. I make these reservations

_____ In person _____ By telephone _____ Online

11. When materials I want to borrow are not listed in the catalog of my local library, I request that the library obtain the materials from another library:

_____ Never _____ Occasionally _____ Frequently _____ All the time

_____ I was not aware I had that option (skip to Question 13)

12. I make these interlibrary loan requests

_____ In person _____ By telephone _____ Online

13. I contact a reference librarian at the public library for assistance:

_____ Never _____ Occasionally _____ Frequently _____ All the time

14. I contact a reference librarian (check all that apply):

_____ In person _____ By telephone _____ Via online chat or e-mail

15. I attend educational programs and special events held at the public library:

_____ Never _____ Occasionally _____ Frequently _____ All the time

Recent events or programs attended:

16. My child(ren) or grandchild(ren) attend educational programs and special events

held at the public library:

_____ Never _____ Occasionally _____ Frequently _____ All the time

_____ I don't have children or grandchildren.

Recent events or programs attended: _____

17. In a typical year, I pay late fees for not returning borrowed items on time:

_____ Never _____ Less than \$25.00 _____ \$25.00 to \$49.99

_____ \$50.00 to \$74.99 _____ \$75.00 to \$99.99 _____ \$100.00 or more

18. I access the Internet at the public library. _____ Yes _____ No

19. The library is my only means of accessing the Internet. _____ Yes _____ No

20. When visiting the library (check all that apply):

I stop on the way to or from work or another appointment or errand.

I go out for the express purpose of visiting the library.

21. When visiting the library, I stop at nearby businesses that I probably would not have shopped at otherwise.

No Yes (Specify businesses: _____)

22. If you answered yes to #21, please estimate the amount spent at nearby businesses on a typical visit to the public library:

(\$ _____)

23. I use the library for (check all that apply):

Reading material and media for personal use and enjoyment

Educational/research materials for school, work, or special projects

Other (please specify: _____)

24. I access the public library online:

Never A few times a year Once a month or more

Two to three times per month Once a week or more

I was not aware I had that option

SECTION 2: LIBRARY ALTERNATIVES

25. If visiting a local library was not an option (check all that apply):

_____ I would do more research online

_____ I would purchase books, audiobooks and periodicals more often

_____ I would rent DVDs/videos/CDs more often

_____ I would purchase DVDs/videos/CDs more often

_____ I would do without the materials I typically borrow rather than renting or purchasing them

_____ I would take classes or attend other events and programs elsewhere

_____ Other (specify: _____)

26. Estimated amount saved by borrowing books, audiobooks and periodicals that I would otherwise purchase:

\$_____ per month

27. Estimated amount saved by borrowing DVDs/videos/CDs I would otherwise rent:

\$_____ per month

28. Estimated amount saved by borrowing DVDs/videos/CDs I would otherwise purchase:

\$_____ per month

29. Estimated amount saved by attending library programs and events instead events and programs held elsewhere:

\$_____ per month

SECTION 3: ATTITUDE ABOUT PUBLIC LIBRARIES:

30. I feel that the public library contributes in a meaningful way to the quality of life in my community:

_____ Strongly agree _____ Agree _____ No opinion
_____ Disagree _____ Strongly disagree

31. Funding public libraries is a good use of a portion of my tax dollars:

_____ Strongly agree _____ Agree _____ No opinion
_____ Disagree _____ Strongly disagree

32. In a typical year, I make a monetary contribution to my public library, a Library Foundation, or Friends of the Library group:

_____ No _____ Yes (Amount: \$ _____)

33. In a typical year, I volunteer my time to my public library, a Library Foundation, or Friends of the Library group:

_____ No _____ Yes (Amount: _____ hours)

34. Access to a good public library was a factor in deciding where to live:

_____ A strong factor _____ Somewhat of a factor _____ Not a factor

SECTION 4: DEMOGRAPHIC INFORMATION

35. In what zip code do you reside? _____

36. What is your age? _____

37. What is your gender? _____ Male _____ Female

38. What is your current marital status?

_____ Single (never married) _____ Married

_____ Widowed / divorced / separated

39. What is the highest level of school you have completed?

_____ Grade school or some high school _____ Graduated college

_____ High school diploma / GED _____ Some graduate school

_____ Some college (includes junior college) _____ Graduate school
(Masters / Ph.D.)

_____ Technical / vocational / trade school _____ Professional Degree
(M.D. / J.D.)

40. What is your approximate annual household income?

_____ less than \$20,000 _____ \$40,000 to \$59,999 _____ \$80,000 to \$99,999

_____ \$20,000 to \$39,999 _____ \$60,000 to \$79,999 _____ \$100,000 or more

41. Where do you reside?

_____ In a home or condominium owned by me and/or my family

_____ In a rented apartment _____ In student housing on campus

_____ Other (specify: _____)

APPENDIX 2- FOCUS GROUP INTERVIEW SESSION SCHEDULE

DATE:	LIBRARY	SYSTEM:
February 22, 2008	River Falls	Indianhead Federated
February 22, 2008	Menomonie	Indianhead Federated
February 25, 2008	Hayward	Northern Waters
February 26, 2008	La Crosse	Winding Rivers
February 26, 2008	Appleton	Outagamie Waupaca
February 26, 2008	Kaukauna	Outagamie Waupaca
February 27, 2008	Green Lake	Winnefox
February 27, 2008	Neenah	Winnefox
March 4, 2008	Fort Atkinson	Mid-Wisconsin Federated
March 4, 2008	Wausau	Wisconsin Valley
March 5, 2008	Dodgeville	Southwest Wisconsin
March 6, 2008	Sun Prairie	South Central
March 6, 2008	Pardeeville	South Central
March 7, 2008	Hartford	Mid-Wisconsin Federated
March 10, 2008	Janesville	Arrowhead
March 10, 2008	Manitowoc	Manitowoc-Calumet
March 11, 2008	Glendale	Milwaukee County Federated
March 11, 2008	Franklin	Milwaukee County Federated
March 11, 2008	Madison (Ashman)	South Central
March 11, 2008	Monona	South Central
March 12, 2008	Waterford	Lakeshores
March 12, 2008	Menomonee Falls	Waukesha County Federated
March 12, 2008	Sussex	Waukesha County Federated
March 12, 2008	Milwaukee (Washington Park)	Milwaukee County Federated
March 12, 2008	Milwaukee (Bay View)	Milwaukee County Federated
March 13, 2008	Shawano	Nicolet Federated
March 13, 2008	Green Bay	Nicolet Federated
March 13, 2008	Kenosha (Southwest)	Kenosha County
March 14, 2008	Sheboygan	Eastern Shores

FOCUS GROUP SESSION LOCATIONS



APPENDIX 3- HANDOUT TO LIBRARY DIRECTORS

Wisconsin Public Library Impact Study

Group Interview Sessions

Purpose:

The primary purpose of these sessions is to get public input on the economic impact of public libraries.

Length of Group Interviews:

We try very hard to do these interviews in an hour. We try to start promptly and to end on time. Occasionally a group really gets going and we use discretion in extending the session so that everyone has a chance to be heard.

Format and Protocol for Group Sessions:

We use a standard interview script that introduces the public library economic impact study, the purpose of the session, and a brief background on who is doing the study. All sessions are moderated by NorthStar Economics staff.

Group Size:

Based upon our experience, a group size of 5 -15 is workable. The ideal size is 8-10 people.

Composition of the Group:

We want a cross section of the community including library users and if possible non-users. We would also like to have a wide range of people from sectors such as health care, business, non profits, government etc. The composition of a group does not have to be perfect. We are doing enough interviews and the large number of those being interviewed compensates for the balance issues of individual groups.

Location:

We want to hold these sessions in public libraries.

Dates and Time of Day:

We are scheduling interviews the weeks of February 25, March 3, and March 10. We can do these sessions during the day, late afternoon, or early evening.

APPENDIX 4 - FOCUS GROUP INTERVIEW SCRIPT

WISCONSIN PUBLIC LIBRARY

ECONOMIC IMPACT STUDY

Interview Script

FEBRUARY, 2008

Introduction to share with interviewees:

The purpose of this study is to determine the economic benefit of public libraries for Wisconsin residents and for the overall Wisconsin economy. This study covers all public libraries in the State of Wisconsin. This interview session is part of the study and is designed to get public input and information that may be useful in determining the economic benefits of public libraries.

This study will provide several outcomes that will be useful to public libraries in the State. First, the study will provide a measure of economic impact of the business operations of libraries. Second, the study will help to define the role of public libraries in the economic development of regions and of the State of Wisconsin. Finally, the study will help to guide libraries in future planning of facilities and services that better align public libraries to the economic and social needs of their communities and regions.

This study is supported by funding from the federal Library Services and Technology Act. In Wisconsin, these funds are administered by the Wisconsin Department of Public Instruction. This study builds on a number of state and national studies on the role and impact of public libraries on regional and state economies.

The consultant for this study is NorthStar Economics of Madison, Wisconsin. Dr. David J. Ward is the principal investigator for the project. Dr. Ward will be assisted by Mr. Alan Hart of NorthStar Economics and the staff at NorthStar Economics, Inc.

In the course of this interview session, you will be asked to complete a Wisconsin Public Library Economic Impact Questionnaire and you may be able to complete it during the interview hour or return it later. In the interview session, you will be asked to respond to a number of additional questions that will help gather information for this study and the final report. There are no right or wrong answers to the questions in this interview or questions on the questionnaire. Your knowledge and or perceptions with respect to the questions asked are valuable in completing the study.

All information and responses gathered in interviews will be kept confidential. We respect your privacy and want to assure you that candid responses will be held in the strictest confidence.

II. Libraries in the Knowledge Economy / New Economy

1. Do you think that public libraries are more or less important in our modern economy (sometimes called the Knowledge Economy or New Economy)? Why?
2. Do you think public libraries will be more or less important to the future (5-10 years from now) economy in the State of Wisconsin? Why?
3. In your current occupation or in your current life, is information or knowledge more or less important compared to five years ago?
4. Should libraries be in the business of educating people about and providing people and businesses with access to new information sources and technologies?

III. Other Thoughts or Comments

1. Please feel free to express other thoughts and comments about the current and future role of public libraries in the Wisconsin economy.

Thank you for your participation.