

After the Fall: The Global Economic Crisis and the Reinvention of Libraries

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United States of America

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ARLINGTON
VIRGINIA



PUBLIC LIBRARY



Sorry **WE'RE**
CLOSED

“Good public libraries must be placed within the reach of all of our people. Libraries are not just for the young and the curious about an exciting world. They are not just for our youth preparing for their careers. They are not just for busy people looking for information to do their jobs. Libraries are for everyone and therein lies their real value ...”

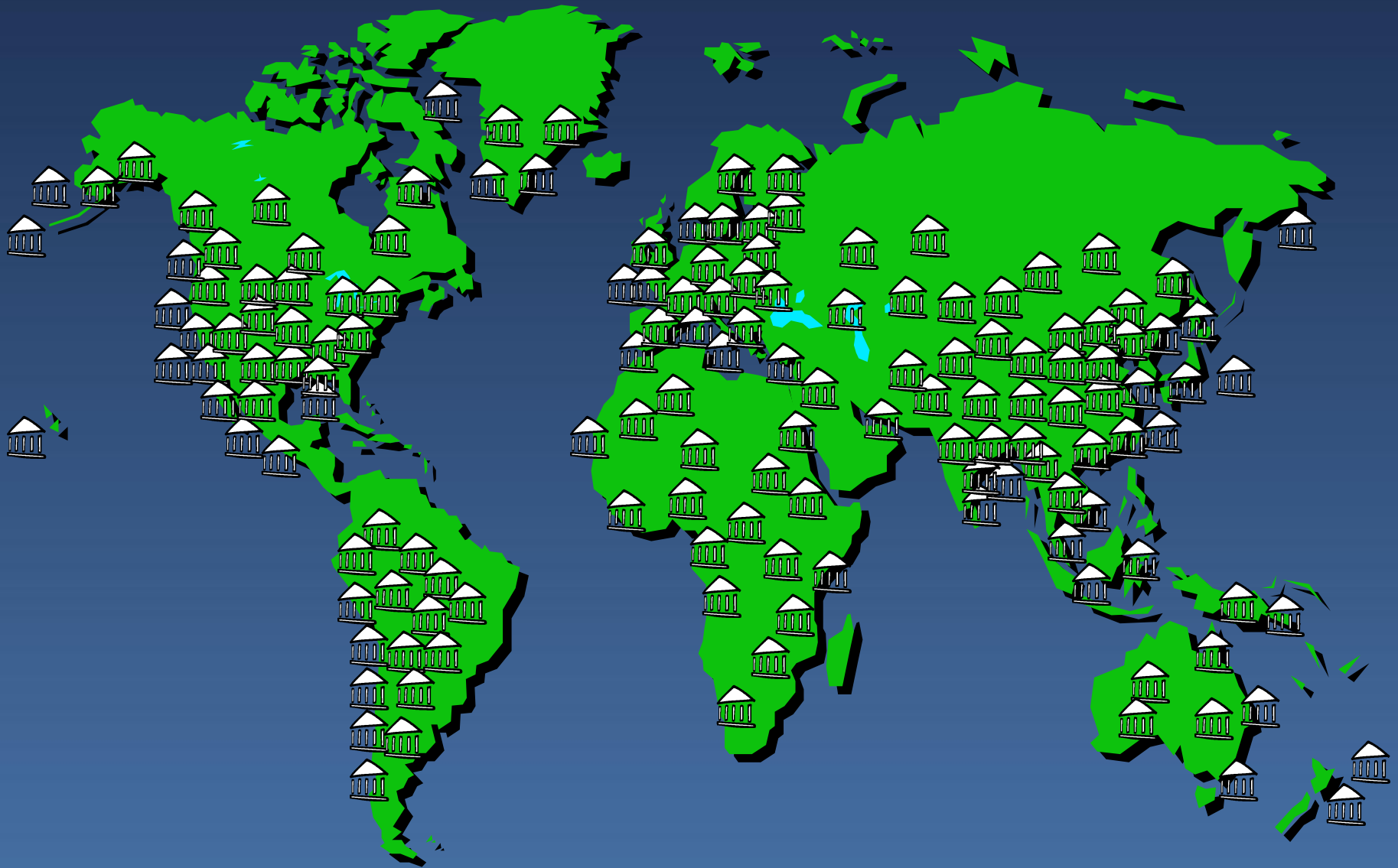
~ Lyndon Baines Johnson, 36th President of the United States

Focus Today on the Big 3

- Context (What)
- Customers (Who)
- Community (How)

Context

Estimated 122,101 libraries in US alone



ALA Fact Sheet

What Do Libraries Do?

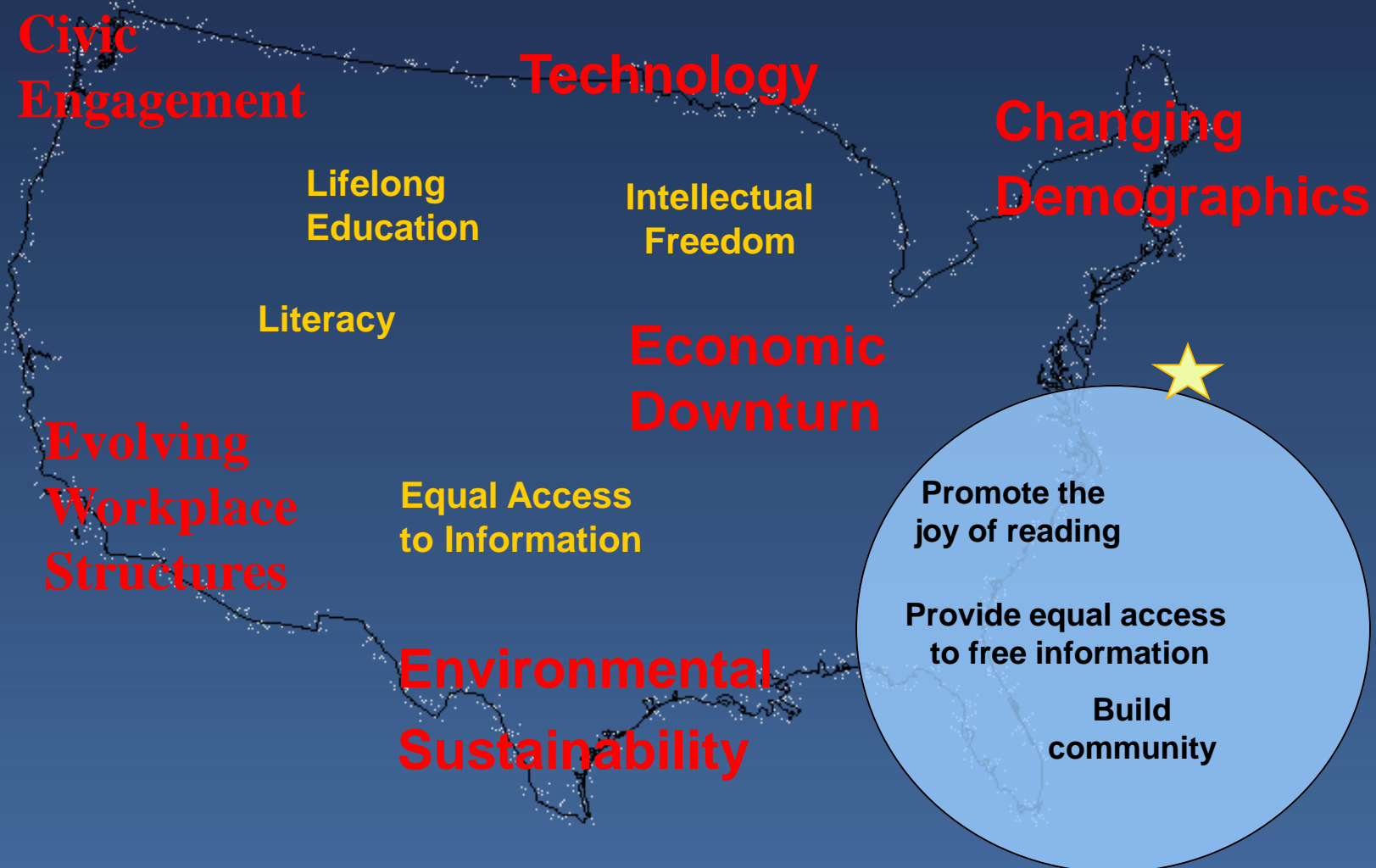
- Collect and describe materials
- Preserve materials for future generations
- Provide free and open access to local and global resources
- Support life long education
- Minimize the digital divide

= Serve the Public Good

What *Will* Libraries Do?

- Users are changing
- Needs are changing
- Resources are changing
- *Libraries must change*

Emerging Contexts for Libraries



Arlington Public Library

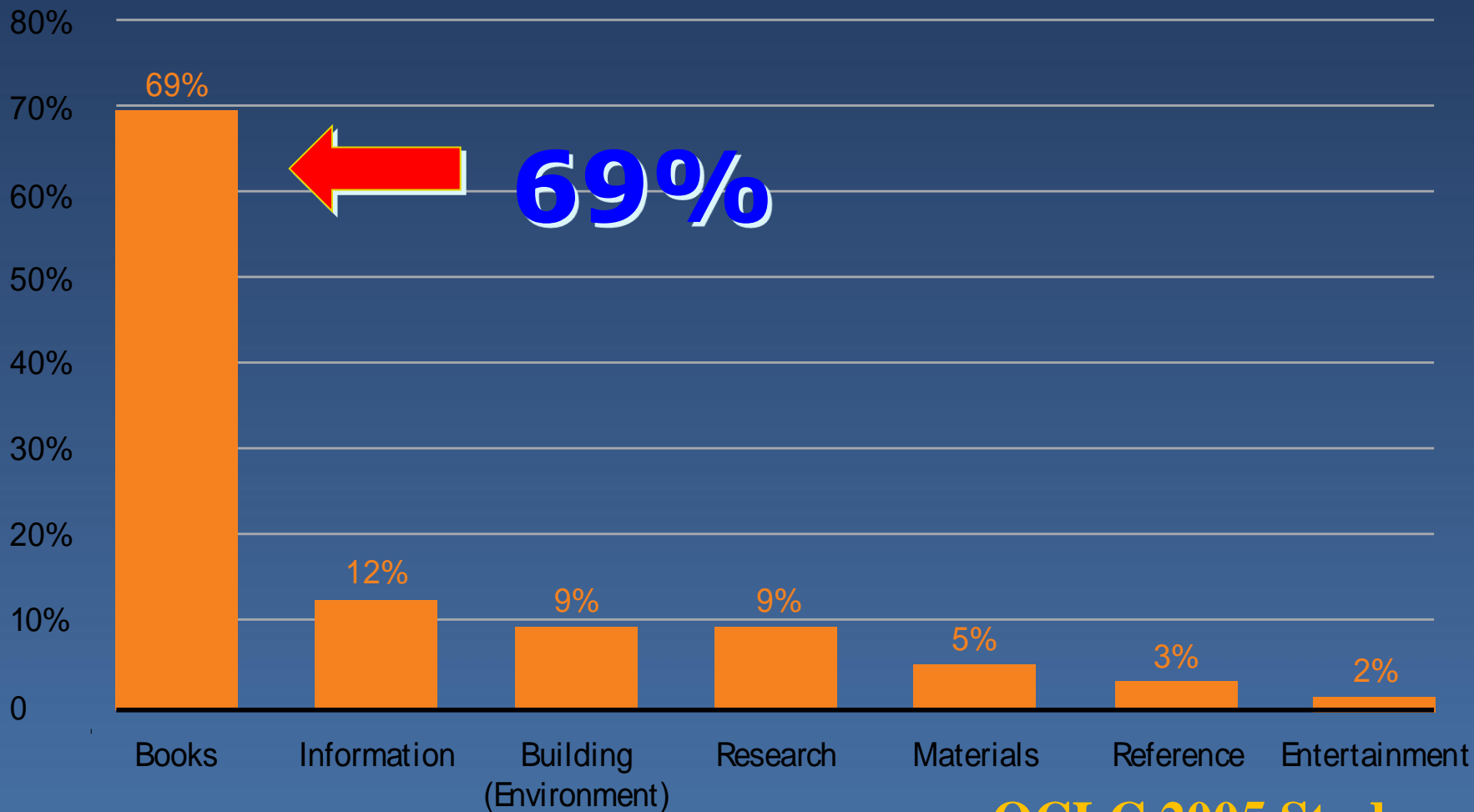
2003 OCLC Environmental Scan

- Dis-aggregation (“I don’t need the whole thing”)
- Collaboration and context (“I like what you like”)
- Self-service (“I can do it myself”)

“Survey Said ...”

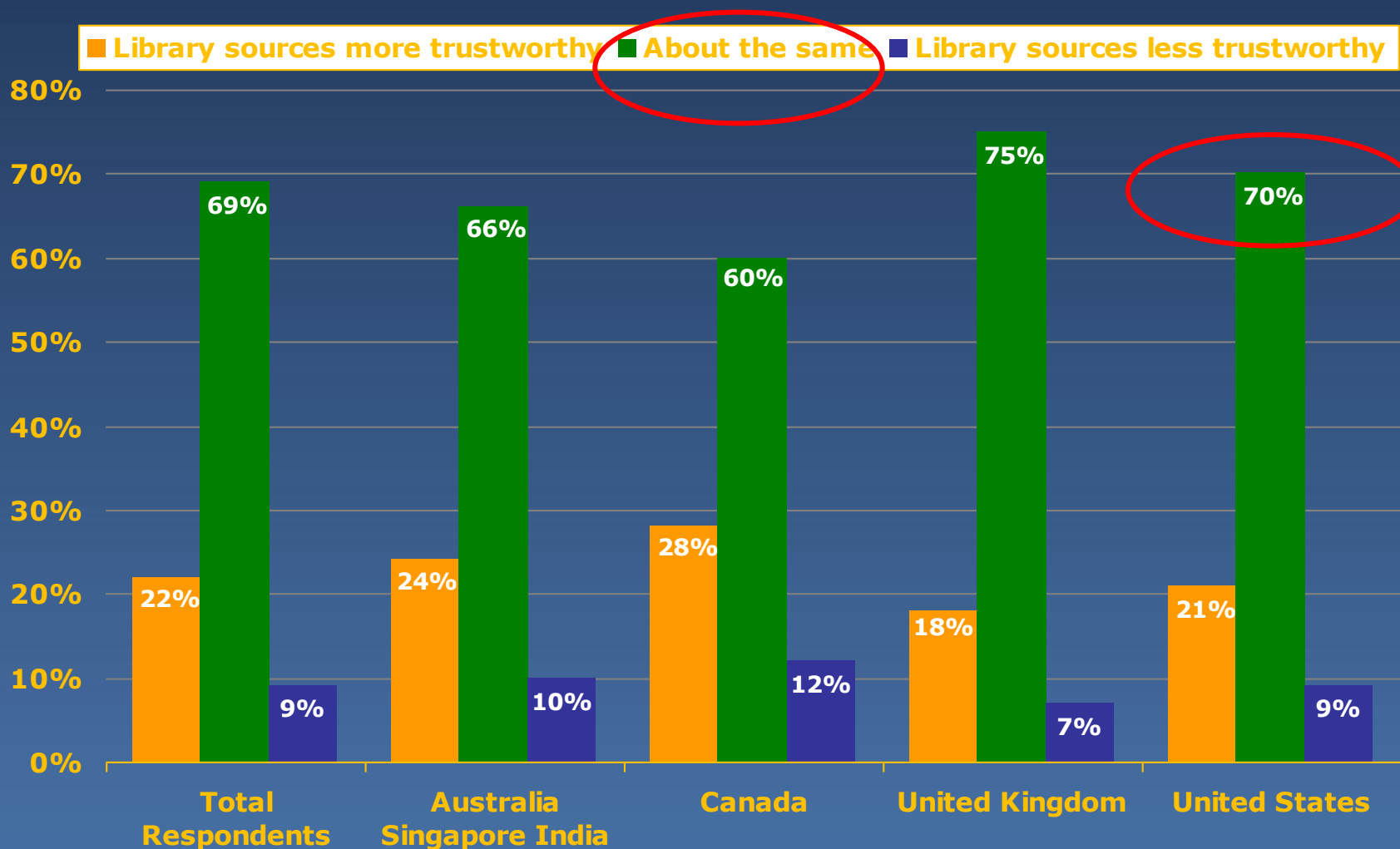
- Customers want it *Now*
- Customers are willing to settle for *less*
- Customers like self-service
- *Find it, Get it, Get out*
- So who *needs* libraries?

What is the first thing you think of when you think of the library?

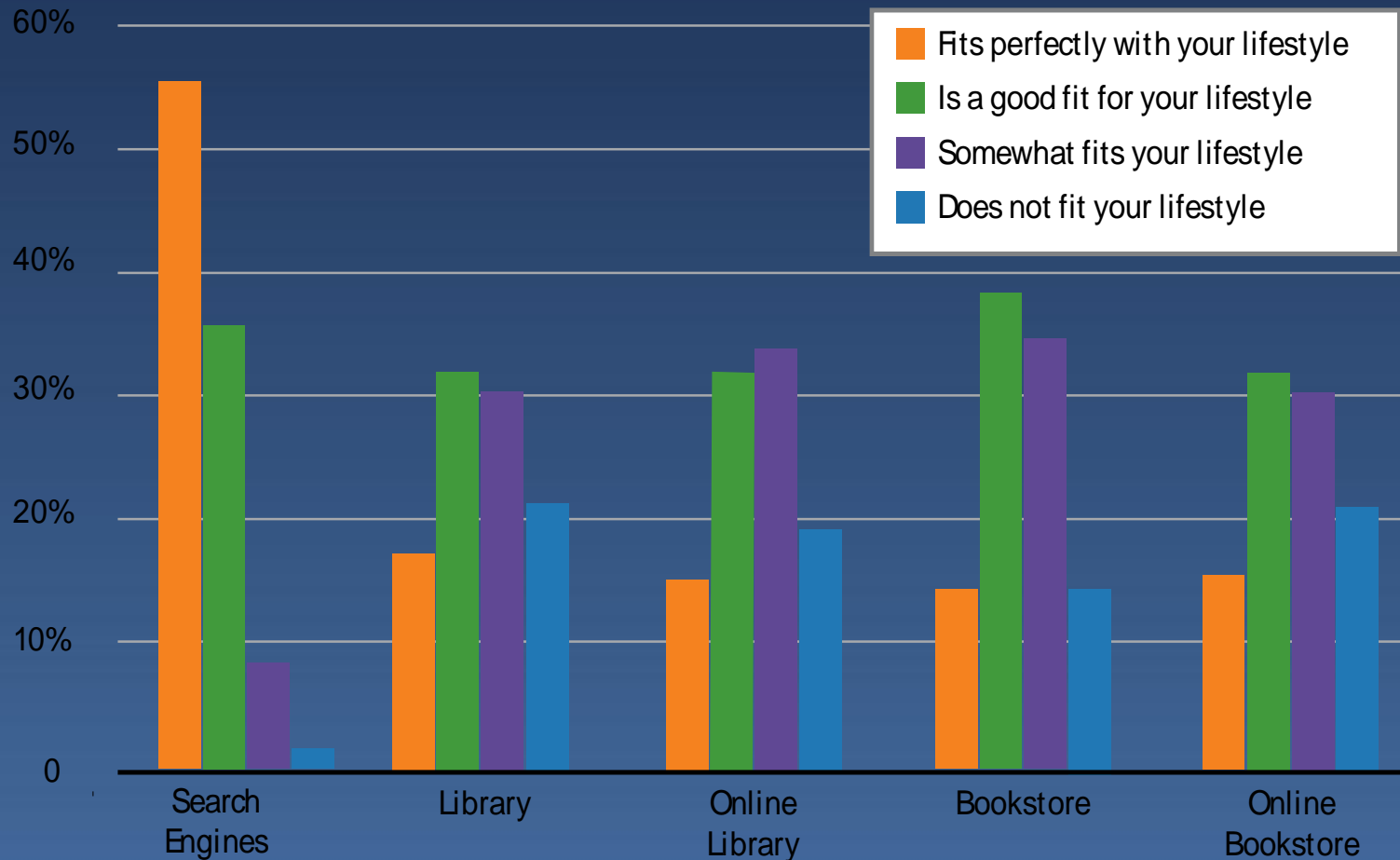


OCLC 2005 Study

... is the information you get from library sources more or less trustworthy than information you get from search engines?



“Lifestyle fit” of information sources among total respondents





Others in “Our” Space ...

- Search engines
- Database aggregators
- Online bookstores (e.g., Amazon)
- Online catalogers (LibraryThing)
- Social networks and other online communities (Twitter, Facebook, Ebay, Craigslist)
- Collaborative reference and research tools (Wikipedia, Foursquare, ask-a expert services)
- Peer-to-Peer Services (iTunes)
- Ratings services (Yelp, Digg)

GOOGLE Gets It

- Focus on the user and all else will follow
- It's best to do one thing really, really well
- Fast is better than slow
- Democracy on the web works
- You don't need to be at your desk to need an answer
- You can make money without doing evil
- There's always more information out there
- The need for information crosses all borders
- You can be serious without a suit
- Great just isn't good enough

Do the Math ...

- 6,930,055,154 Internet Users worldwide (Asia, Europe, North America) (<http://www.internetworldstats.com/stats.htm>)
- 463,000,317 active sites (*NETCRAFT, August 2011*)
- 13% of online Americans use Twitter (*Pew, 2011*)
- Wireless Penetration is 96% of total U.S. population (*CITA*)
- SMS (mobile text, picture and video messages) sent worldwide expected to top 7.5 trillion in 2011 (*Ovum Telecom*)
- US has 40% smart phone penetration 
- Average number of apps on smart phones is 22 (*Nielsen*)
- E-book tablet computer ownership 

... and Then Do Some More

- 26.6% U.S. households are wireless-only; tripled in 5 years (*CITA, 12/2010*)
- Consumers spent >\$63 billion/year on wireless accessories (cases, batteries, memory cards, hands-free kits, headsets, etc) (*CITA*)
- Businesses spent > \$1.9 billion in 2010 on non-handsets (e.g. tablets, notebooks, e-readers); by 2014, \$5 billion+
- Mobile entertainment content and services (games, music, social media, etc) revenue projected to increase from \$33.2 billion in 2010 to \$38.4 billion in 2011. *In spite of economic conditions* (*CITA*)
- 18-24 year olds send 100+ texts/day or 3200+ /month (*Pew Internet American Life, 2011*)
- GOOGLE 1 billion+ unique users per month (*ComScore, June 2011*)

“Americans spend a third their online time (36 percent) communicating and networking across social networks, blogs, personal email and instant messaging.”

http://blog.nielsen.com/nielsenwire/online_mobile/what-americans-do-online-social-media-and-games-dominate-activity/#

Economic Downturn

- Since December 2007, increased competition for available funds – nationally, regionally & locally
- Increased use of libraries during economic downturn yet often first agency to be cut
- Local budget crises
 - Revenue sources fluctuate (local and state)
 - Local priorities (fire, police, human services, libraries) must compete for funds
 - Creates tensions/uncertainty with citizens

Public Libraries: On Life Support?

- Recession drove people to library but funding lags behind
- US: 19 states reported cuts in state funding for public libraries from fiscal 2010 to fiscal 2011
- Worst hit? Libraries serving populations of 1 million+
- More than half of those indicated cuts > than 10%
- US Mayors Report cuts to “Quality of Life” programs: parks, libraries, heritage festivals, after-school programs
- 2011: nearly 30% of US urban libraries decreased operating hours
- Bang for the Buck? Outsourcing of Library systems

“Libraries seem to be losing out in the funding battles, due, in part, to the mistaken belief that they are somehow anachronistic in an age when so many Americans have instant computer access to information through the Internet. This . . . threatens to destroy a network of public assets that remains critical in this country.”

~ Scott Turow, *American Author*

Evolution of eBooks

- Standard formats: Either PDF or EPUB
- Titles Available: best-selling/new releases
- Quality: reading software made easier to read and more user-friendly
- Cost: once more expensive, now often cost less than the print versions
- Hardware: growing # eBook devices



=



Customers











“The real change is a cultural one and it’s deep. Users are telling us it’s all about access, and libraries are all about ownership, and this is a problem. Users are telling us that the place doesn’t matter.”

~ Daniel Greenstein, *Chronicle of Higher Education*, 2002

Shift Happens: Then vs Now

- Space defined by owner → space defined by consumer
- Brand in control → consumer in control
- One way/delivering a message → two-way/part of a conversation
- Repeating the message → adapting the message
- Focused on the brand → focused on the consumer adding value
- Entertaining → influencing/ involving
- Company created content → consumer created/co-created content

Shift Happens: In What We Do

- Resources scarce/attention abundant → resources abundant/attention scarce
- Precise search → begin broad then narrow
- Visible mediation → self help/self service
- Expertise, place, services vertically organized around collections → comingled, loosely connected and organized

And In How We Communicate

- **LINEAR**

- Scheduled
- Appointment
- Sit back
- Messages
- Content we think you'd like
- We control the way it is delivered

- **NETWORKED**

- On demand
- Whenever, wherever
- Participate
- Experiences
- Content we know you like (*because you've told us*)
- We allow you to play with it, pass it on



They're Here ... Millennials Rising

- Format agnostic
- Nomadic
- Multi-tasking
- Experiential
- Collaborative
- Principled
- Adaptive
- Expect instant gratification
- Service-oriented



“85% of kids under age 25 have an IM account, usually more than one. They're having *conversations* on the web. When they get into the workforce, they are not going to want to get letters from their librarians.”

~ Stephen Abram, MLS, Vice President, Strategic Partnerships and Markets at Gale Cengage

“I love doing research. I’m on Wikipedia all the time.”

~ Nathaniel Kresh, *age 14*

New Skill Set for Librarians

- Customer focused
- Participatory/collaborative
- Accept workplace change as constant – economic, social
- Embrace risk and experimentation
- Manage multiple priorities
- Technology aware – e-content and communication tools
- Provider of social services

OCLC 2010 Report: *Call to Action?*

- Users don't begin research on library website; rethink strategies to connect online
- Libraries = Books; expand the brand to include other free material/free services (job search, tutoring, computer skills, e-books)
- Librarians add value to the search process; especially to those hardest hit by recession
- The info-sphere is social; create the online third place
- Use of libraries increased in economic downturn; get users to tell their stories and advocate for libraries

Go Mobile

- Mobile device will be the primary connection tool to the internet for most people by 2020 (*Pew, 12/2008*)
- Find out mobile technologies your patrons use
- Find out what library services/content/programs users actually want to use via a mobile device
- Create a library app so users can install and easily access specific library functions/info
- SMS new content arrivals, events, news
- 80% of American Teens have a library card

“Good insight helps you know what your customers need before they know themselves.”

~ Matthew Milan, *Critical Mass.com*

Community

“The desire to be part of a group that shares, cooperates, or acts in concert is a basic human instinct.”

~ Clay Shirky, *Internet Talking Head*

Space not Place

- It's not about the Library!
- It is about five very specific user spaces and communities
- Each of which is supported by experts, collections, technical tools and systems and services

Learning

Research

Entertainment

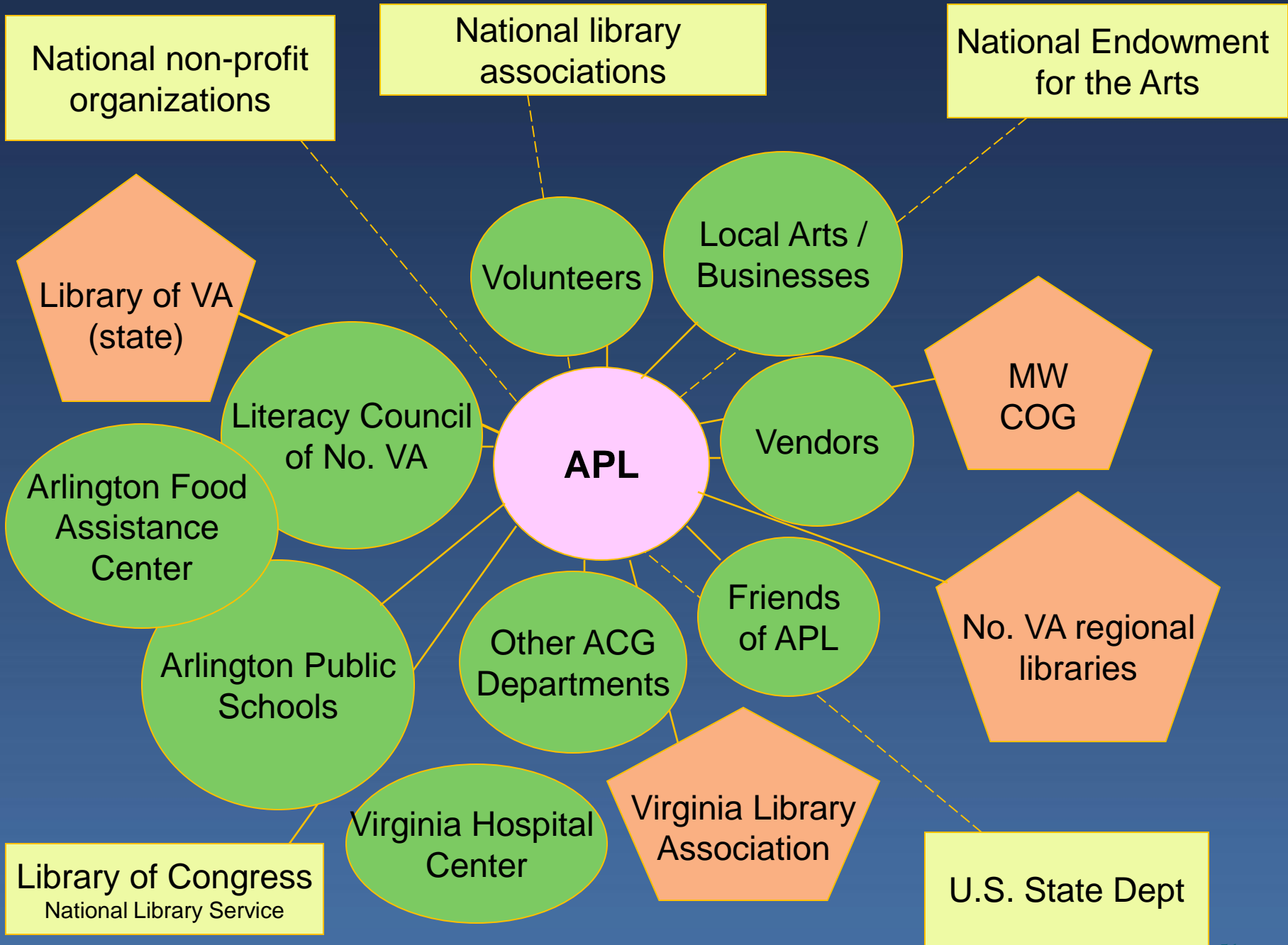
Workplace

Neighborhood



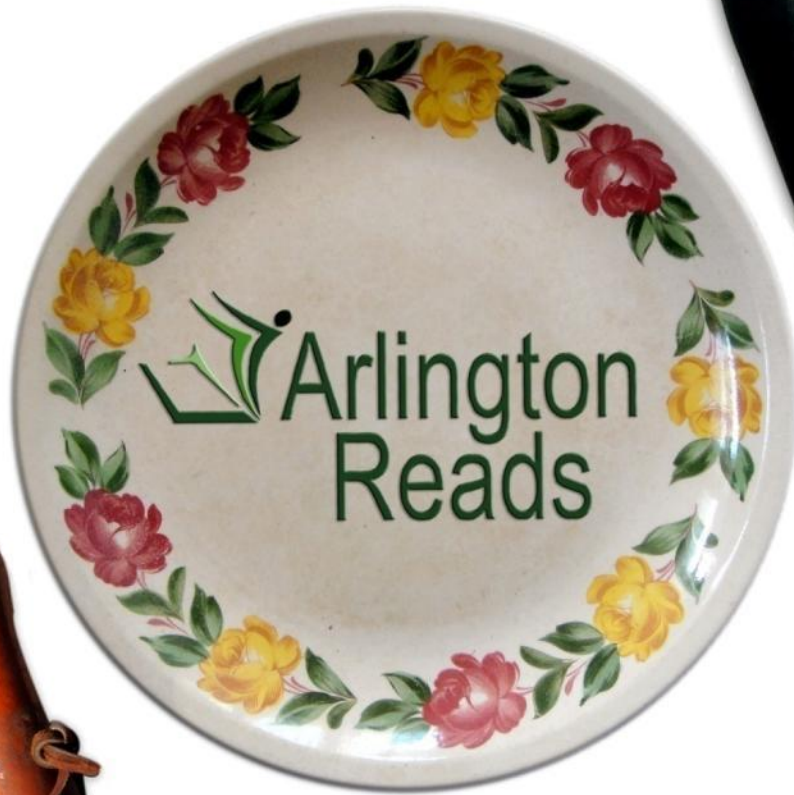
Arlington Public Library

- Founded 75 years ago
- FY 2011 budget: \$11.4 million; 1.3 percent of GF
- 8 libraries
- 650,000 items (print to *E*)
- Annual circulation of 3.3 million
- 125 FTEs and ca. 125 volunteers logging 1,200+ hours per month
- Some services/collections accessible 24/7/365
- Special local history collection –Virginia Room



APL Measures Success

- Consistently ranked in upper quartile for key metrics of collection turnover, visits per capita, and check-outs per capita (*Public Library Data Service*)
- 26,500 new cards issued each year
- 331,944 computer sessions
- Patron feedback sought through informal surveys, suggestion boxes, blogs and focus groups, community conversations
- 2008 *Resident Satisfaction Survey*: “very satisfied” with library services (*ETC Institute*;
<http://www.arlingtonva.us/departments/CountyManager/page64762.aspx>)



Library as “Third Place”

- Ray Oldenburg, “The Great Good Place” (1999)
- Defined as: “where people can gather, put aside the concerns of work and home, and hang out simply for the pleasures of good company and lively conversation - are the heart of a community's social vitality and the grassroots of democracy.”





Arlington Breathes FRESH AIRE

AIRE
ARLINGTON INITIATIVE
TO REDUCE EMISSIONS

ARLINGTON
VIRGINIA

blog

When Arlingtonians & friends share ideas, experiences, and tips that promote Fresh AIRE.

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MORE ON AIRE

April 01, 2007

Banning Bags and Duping the Kids



Episode 3 (or 4?) -- The Smiths
Take on Global Warming: This past Friday night, I got a phone call from my friend, Vicki Cornish, a 15-year resident who lives in the Donaldson Run area. We hadn't talked in a long time, and I figured Vicki was simply calling to chit-chat. Well, for sure we did some of that, but then the truth came out! Vicki had been reading all about the [Fresh AIRE](#) campaign in the last [Citizen](#) newsletter. And she had discovered this AIRE blog -- and that I was connected to it. Then I learned Vicki was on a mission. She wants plastic bags banned from Arlington. She sent me some background about how [San Francisco](#) recently banned petroleum-based plastic checkout bags in large markets and pharmacies. The mandate calls for the use of [biodegradable plastic bags](#) or [recyclable paper bags](#). Certainly seems like it could be a good idea. Anyway, after we talked, I pulled open our kitchen

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- Countywide initiative
- Integrated programming
- Common branding
- Engage community partners
- Raise awareness of issues
- Raise visibility of libraries

Arlington Public Library on YouTube



- Market
- Promote the brand
- Raise the visibility
- Build new audiences
- Go where the users are
- Have fun

Bring the Library to the users ...



... to unlikely places



... with unlikely partners



. . . and with unlikely results





Find Out What You're Not Doing

- Stalk the non-consumer
- Conduct surveys/focus groups
- Track local media reports
- Encourage “participatory librarianship”
- Test + Try = Transform
- Do what THEY can't or won't do
- Find the “white space” and fill it
- Find the right partners

Better Together

- TMI – no library can do or have it all
- Build on strengths and link to the rest
- Tell our story . . . *Often*
- Build advocacy
- Meet users where *they* are and make it personal
- Is IT working for you???
- Calculate ROI: cost reductions, time saved, risks avoided
- and remember . . . *She who hesitates ...*

Everything is Marketing

- Every time you answer the phone
- Answer a question at a service desk
- Post on your website, your blog, Tweet
- Libraries are retail and retailers build brand loyalty
- **SELL**

Final thoughts ...

Your Library



Your Vision



Your Brand



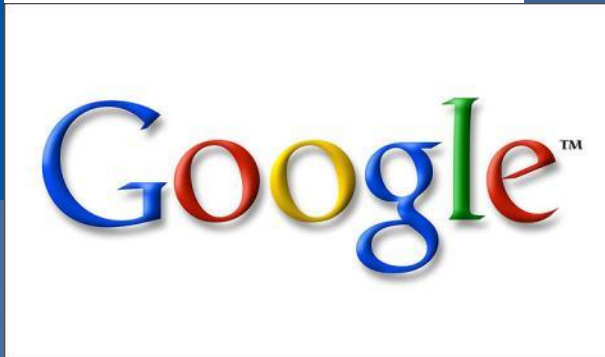
Your Customers



Your Staff



Your Collaborators



Your Strategy

