Seminole County Public Library Services Master Plan Preliminary Recommendations

Prepared by Godfrey's Associates, Inc.
Library Planners & Consultants

Table of Contents *PDF page*

1 Seminole County Public Library Master Plan Presentation of Preliminary Recommendations

Seminole County

Public Library Services Master Plan

Preliminary Recommendations

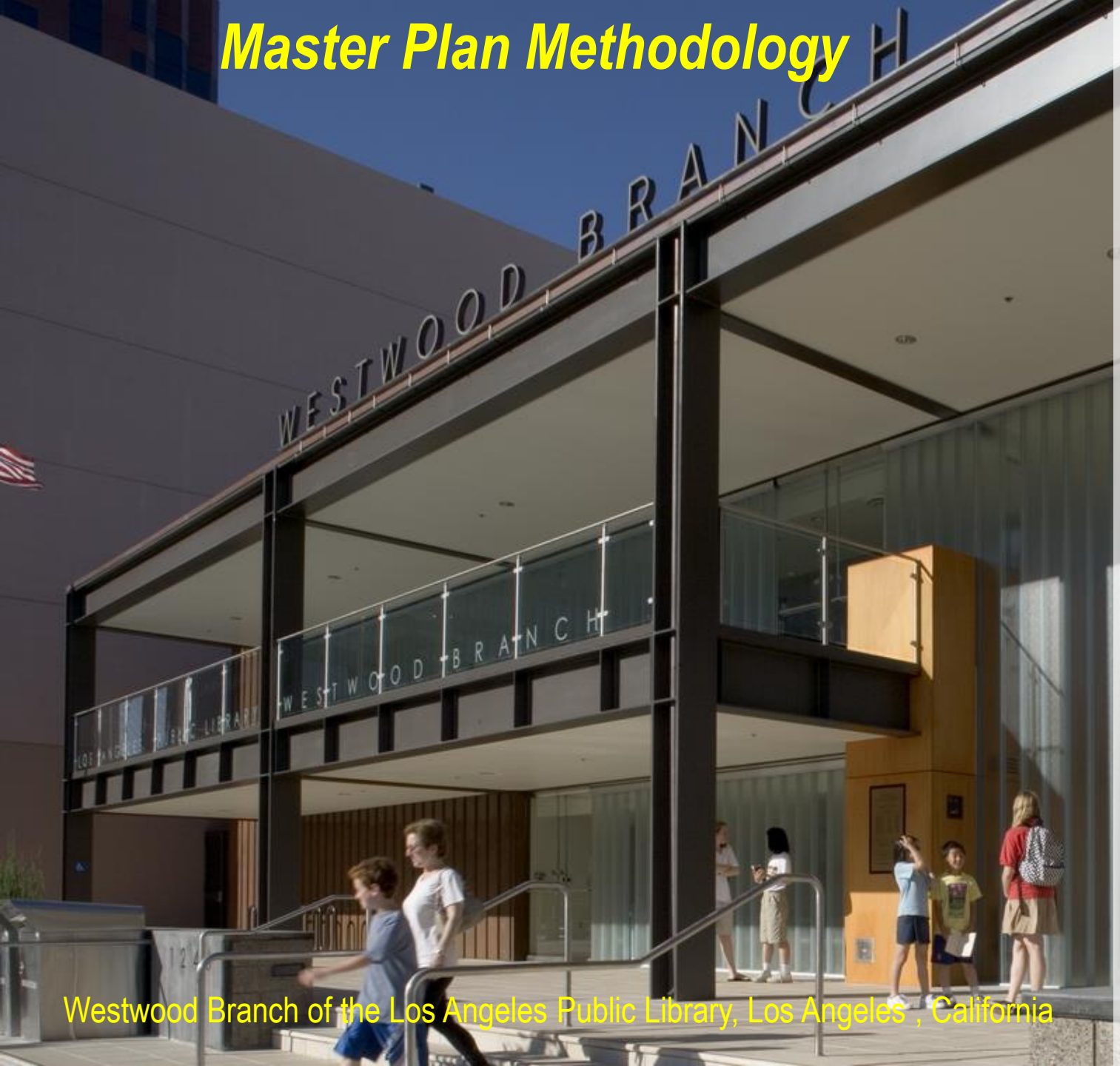
Godfrey's Associates Library Planners & Consultants

Godfrey's is an international library practice:

- Nationwide expertise
- Extensive Florida experience – 26 public library systems
- Operational cost-sensitive

Otis College Library, Los Angeles, California

Master Plan Methodology



Westwood Branch of the Los Angeles Public Library, Los Angeles , California

Godfrey's used quantitative & qualitative research to inform our data-driven findings, conclusions & recommendations

- Multiple community engagement forums
- Demographics analysis
- Peer Library analysis
- State Standards compliance assessment
- Existing conditions assessment
- Industry trends analysis

Americans' Use of Leisure Time

Poll December 2 thru 15, 2019 asking:

How many times in the past year did you go to a . . . ?

10.5 times to a library

5.3 times to a movie theater

4.7 times to a live sporting event

3.7 times to a national or historic park

2.5 times to a museum

2.5 times to a casino

GALLUP

ECONOMY JANUARY 24, 2020

In U.S., Library Visits Outpaced Trips to Movies in 2019

BY JUSTIN MCCARTHY

Otis College Library, Los Angeles , California

Market Penetration

The majority of Americans have public library cards

- 61% per Pew Research Center
- 52% Florida state-wide average
- 73% of Seminole County residents hold an SCPL Library card

Return on Investment

Most recent study of dozens performed nationwide on public library investment:

- Statewide for Texas in 2017
- Found a $4.64 return for every $1.00 of public funds invested

Library Survey Results

Over 6,800 responses:

- Very/somewhat satisfying 94.9%
- Used at least monthly 61.9%
- Better/same in former town 54.7%
- Worth possible tax increase 78.5%

Cedar Rapids Public Library, Cedar Rapids, Iowa

Anythink Library, Thorton, Colorado

Library Budget

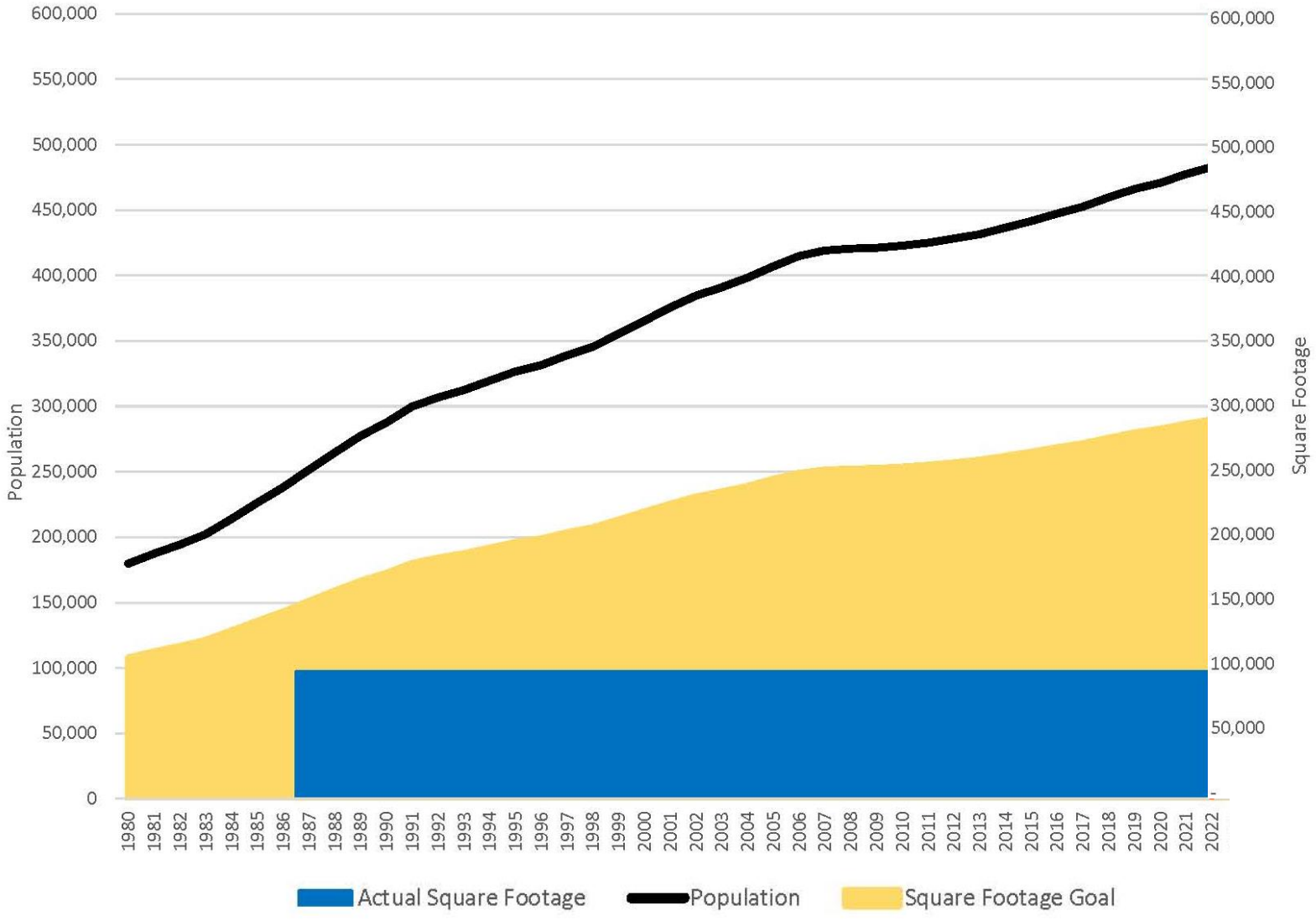
- The Public Library received 2.21% of the total County budget for FY2021/2022
- 5.10% of the total budget goes to public libraries as the nation-wide average

Library Space

0.21 SF per capita in Seminole County

- 0.48 per capita Florida average
- 0.52 per capita Peer average
- 0.60 minimum State standard

Billings Public Library, Billings, Montana



Population & Square Footage: 1980-2022

- Almost 2 times the current Library square footage would need to be added to existing to meet the 0.60 square feet per capita standard
- Based on the current County population

Computers

SCPL = 0.19 per 1,000 population

- 0.78 per 1,000 Peer average
- 0.83 per 1,000 Florida average
- 1.00 per 1,000 Florida Standard

Bronx Community College Library, Bronx, New York

East Branch of the Seminole County Public Library, Oviedo, Florida

Library Collection Items

SCPL = 1.96 per capita

- 1.44 Florida average
- 2.00 Florida Standard
- 2.36 Peer average

Library Expenditures

SCPL = $13.96 per capita

- $27.87 Florida Standard FY2010/2011
- $28.89 Florida average
- $38.85 Peer average

Nashville Public Library, Nashville, Tennessee

Library Staff FTE

SCPL = 0.16 FTE per 1,000 population

- 0.30 per 1,000 minimum Florida standard*
- 0.38 per 1,000 Florida average
- 0.45 per 1,000 Peer & national average

LOS ANGELES PUBLIC LIBRARY

GET A LIBRARY CARD | MY LIBRARY ACCOUNT

Search LAPL for: | Library Catalog | Keyword

Collections & Resources | Locations & Hours | What's On? | Get Involved | About LAPL | Library Store

Español
Get Your Diploma
Kids & Parents
Teens
Teachers
Job Seekers
Adult Literacy
New Americans
Veterans Resources
Health Matters
Money Matter$
Online Learning
Homeless Resources
ADA Services

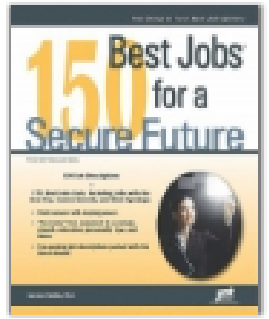
How Do I?
My Library Account
Reserve a Computer
Ask a Librarian
Book a Librarian
Find A Library

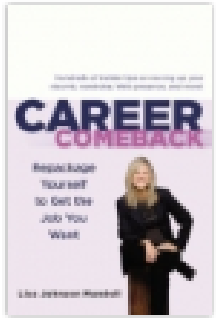
JOB HUNTING AND CAREER GUIDE

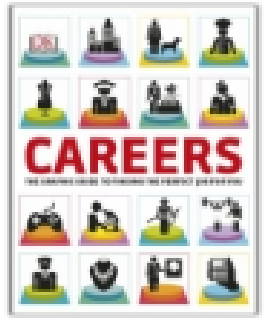
Careers, Education, Training

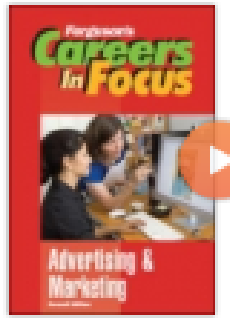
Welcome | Job Seekers Events | Coping | Job Search | Careers, Education, Training | Research Employers | Interviews etc.

Suggestions:
eBooks
Books
Media
Online Learning









Careers Internet Sites
Education & Training Internet Sites
In Person & Telephone Resources
Library Databases
Salaries & Wages Internet Resources

CAREERS INTERNET SITES

CalJOBS℠

Services for both job seekers and employers, including job listings, resume building, recruiting, training videos, labor market information, services for youth, seniors, and veterans.

The CalJobs app is available for both iOS and Android devices, and can be downloaded for free from the App Store and Google Play. When users register for CalJobs, they gain access to a wider range of services including a resume builder and online job applications.

Looking for more? Search here.

A Ready Workforce

Most public libraries have been providing job skills & employment programs for years, including:

- General education, ESL & GED preparation & attainment
- Career guidance
- Job searching
- Resume writing

Small Business Support

Facilities & equipment in libraries support businesses & their development:

- Small group meeting rooms
- Computer stations with high-powered software
- Makerspaces for fabrication
- Mentoring from SCORE & the like

Teen uses 3D printer to make a 'Robohand' for third grade boy

Feb.6, 2014

Recently, a third-grade boy received a new, 3D printed prosthetic hand thanks to the help of 16-year-old maker, Matthew Wilde, and the 3D printer at their local public library.

Wilde is an enterprising guy. He's always been interested in figuring out how things work: from computers to ottoman chairs. About two months ago, Matthew – an adorable nin-year-old from Louisburg, Kansas – came to Wilde, who's a family friend, with a design for a 3D-printable prosthetic hand. Wilde took the desi and his skills to the 3D printers at their local public library to make Matthew's new, 3D printed prosthetic hand.

Creation & Maker Spaces

STREAM: Practical applications for Science, Technology, wRiting, Engineering, Arts & Math

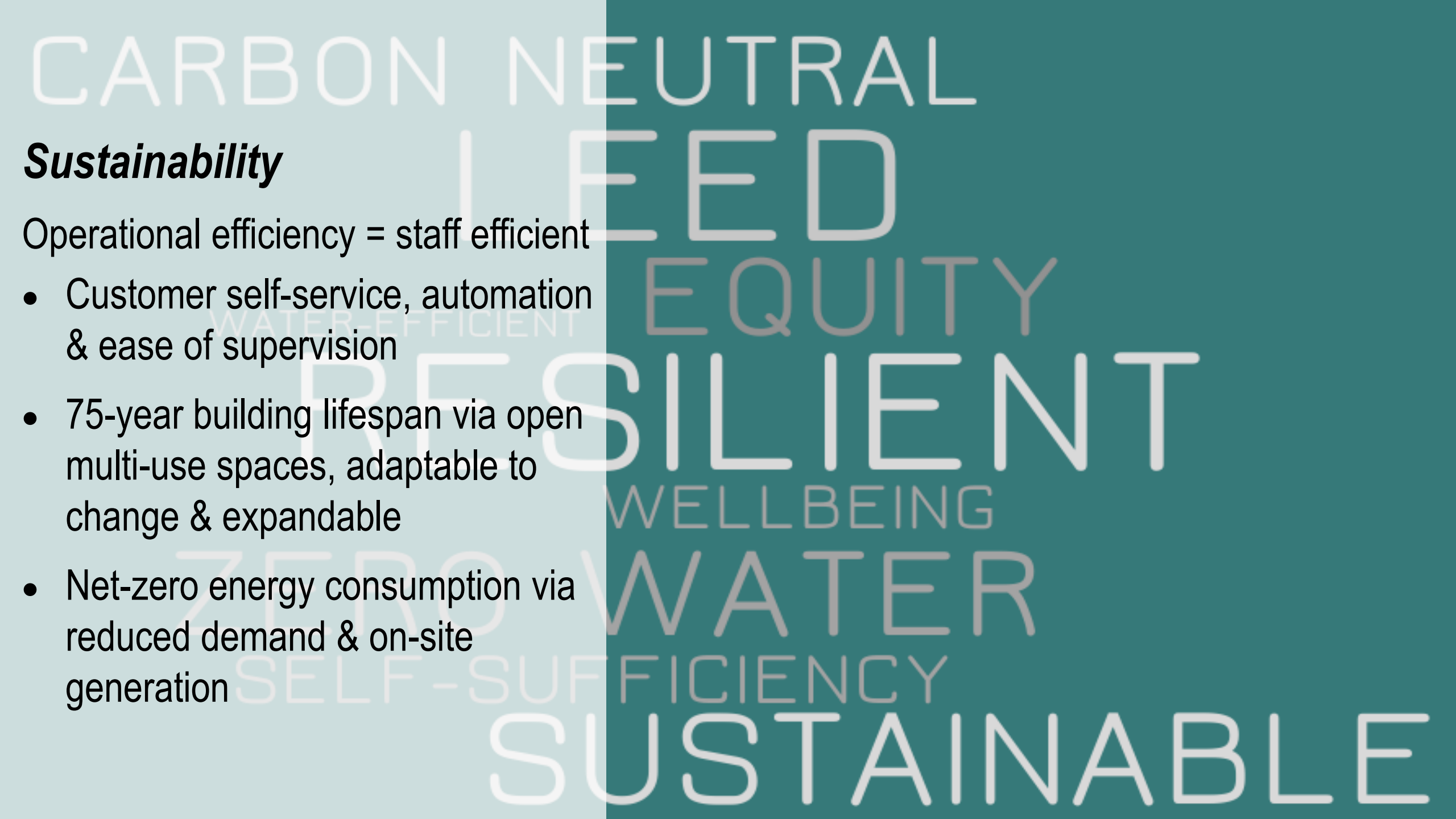
- 3D printers for design & modeling of product prototypes
- Encouraged collaborative problem solving
- Computer coding to artificial intelligence

Affordability

Current Facility Operations

facility	*square feet (SF)*	*operations cost FY2021*	*items checked out*	*cost $/SF/hour*
Central[1]	35,327	$1,440,323	401,774	$0.64
East	12,092	$871,725	433,708	$1.13
North	12,474	$968,297	180,665	$1.21
Northwest	12,092	$914,028	287,656	$1.18
West	12,092	$928,227	227,304	$1.20
System Support[2]	13,381	$1,258,028	432,859[3]	$1.47
TOTALS	97,458	$6,380,628	1,963,966	$1.02

[1]Public service space only *[2]System-wide admin & support functions housed at Central* *[3]All digital items*



Sustainability

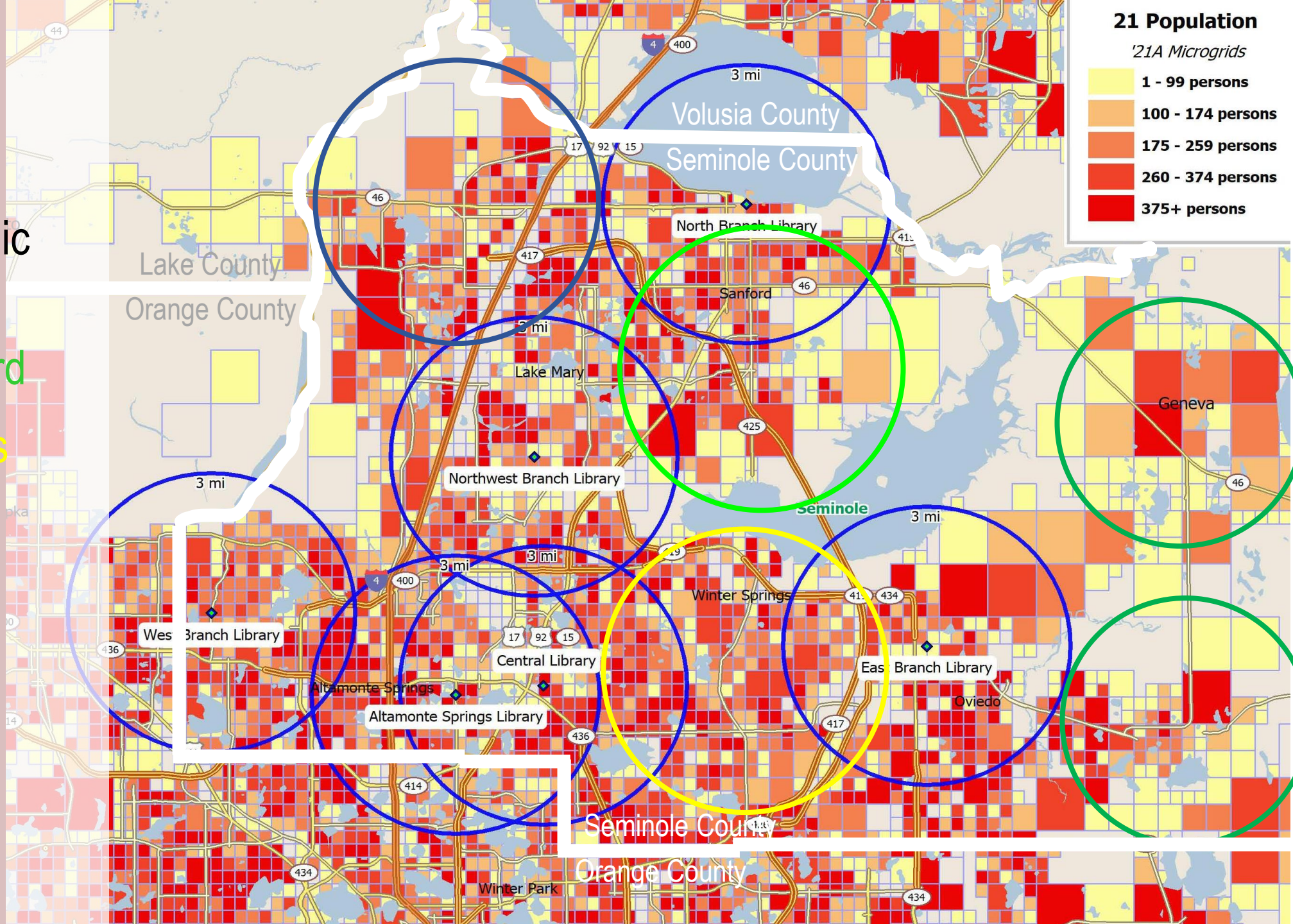
Operational efficiency = staff efficient

- Customer self-service, automation & ease of supervision
- 75-year building lifespan via open multi-use spaces, adaptable to change & expandable
- Net-zero energy consumption via reduced demand & on-site generation

Accessibility

Gaps in geographic coverage:

- Central Sanford
- Winter Springs
- Heathrow
- Geneva
- Chuluota



Attainability

With a $4.64 ROI governments invest

- Capitalize on SCPL's popularity
- Promote cost sharing with local entities
- Secure traditional & non-traditional revenue streams

Chapel Hill Public Library, Chapel Hill, North Carolina

Consultant Recommendations

In three phases: 5-year, 10-year & 20-year horizons

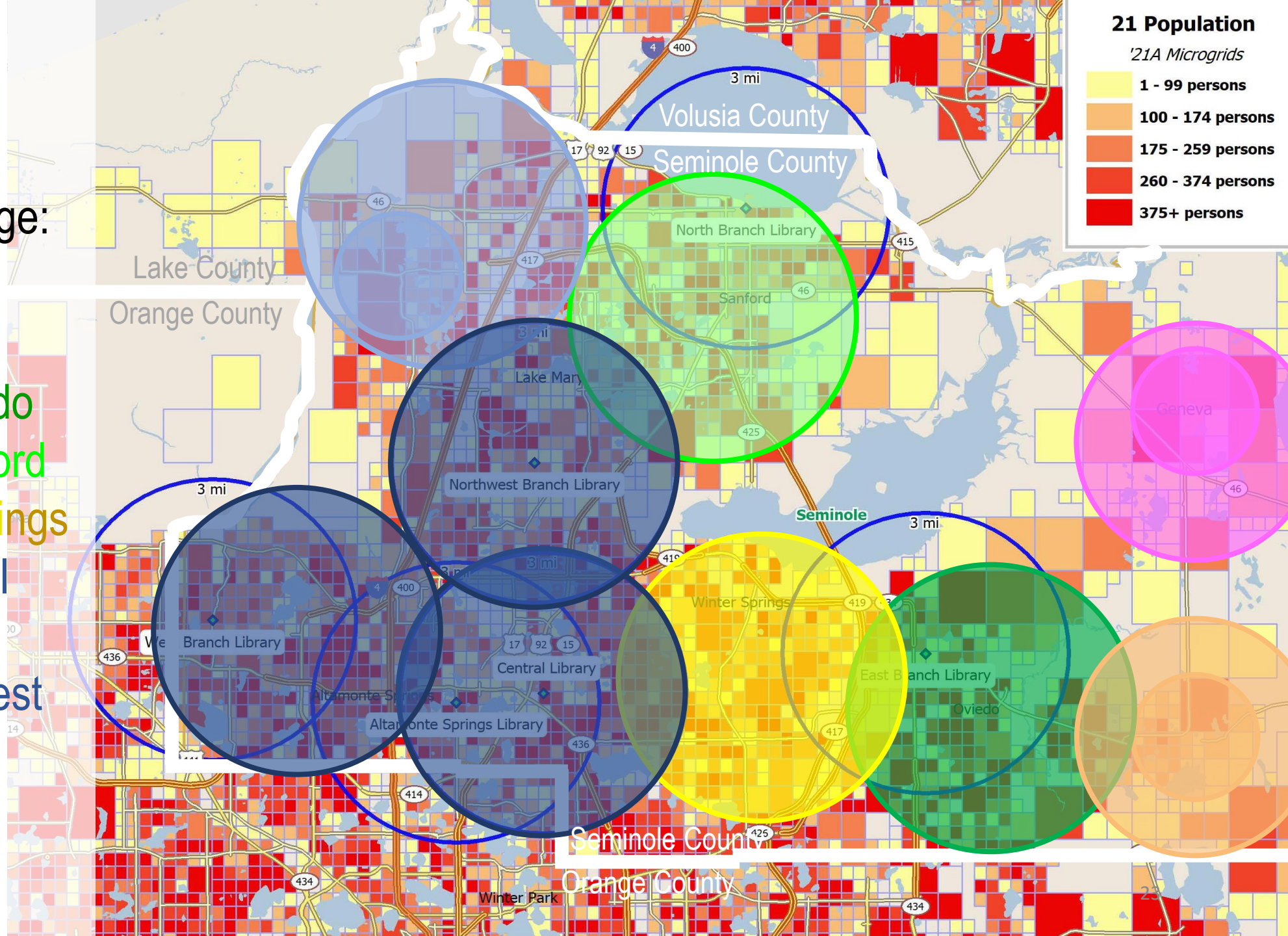
- More Space
- More Staff
- More Revenue

Success Public Library, Cockburn, Australia

Phasing

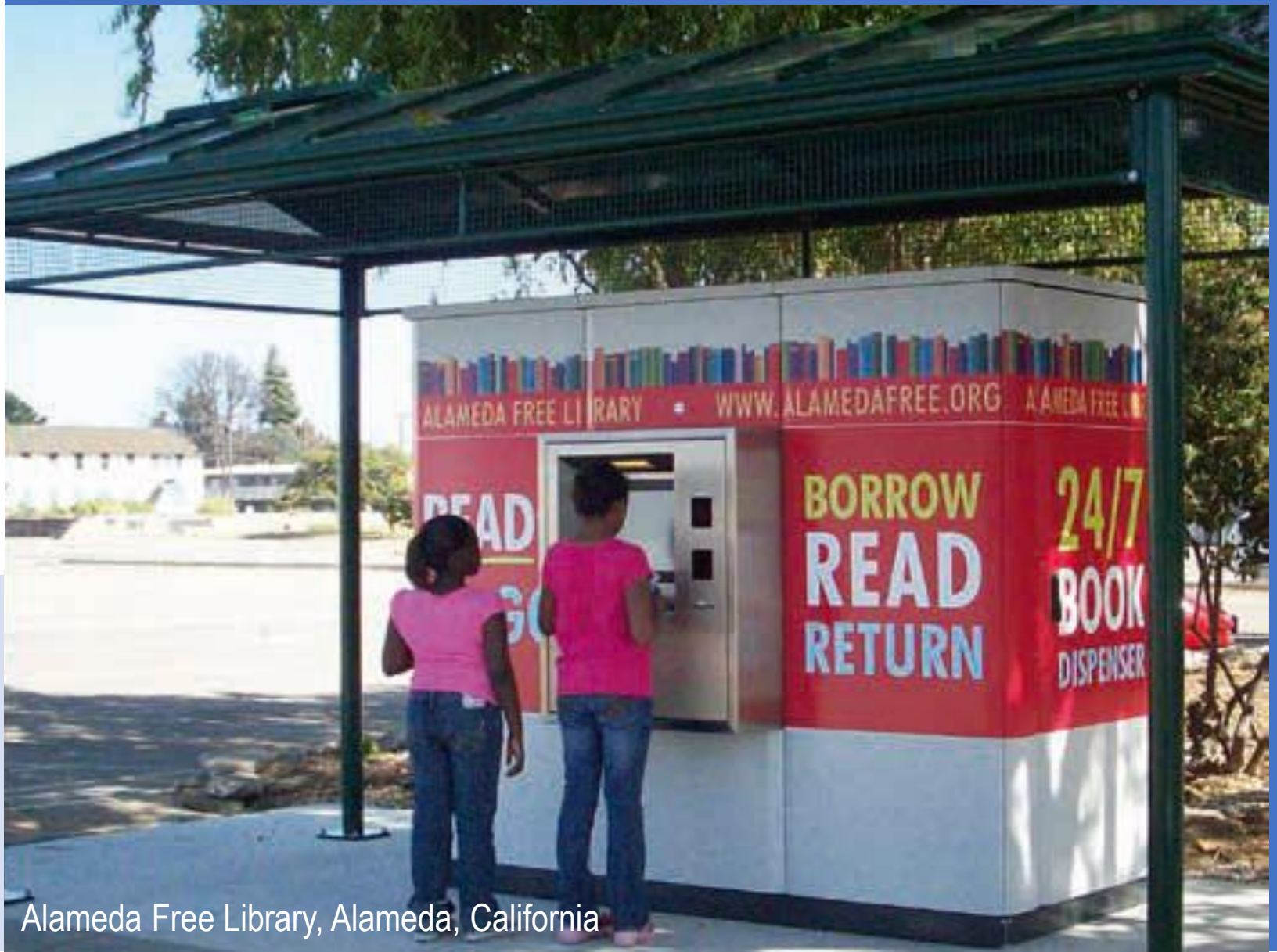
Closing gaps in geographic coverage:

- Heathrow kiosk
- Geneva kiosk
- Centralize Oviedo
- Centralize Sanford
- New Winter Springs
- Upgrade Central
- Relocate West
- Rebuild Northwest
- Chuluota kiosk



Lending/Vending Kiosks

- Portable & modular
- Wi-Fi capable
- Annual operations & maintenance



Alameda Free Library, Alameda, California

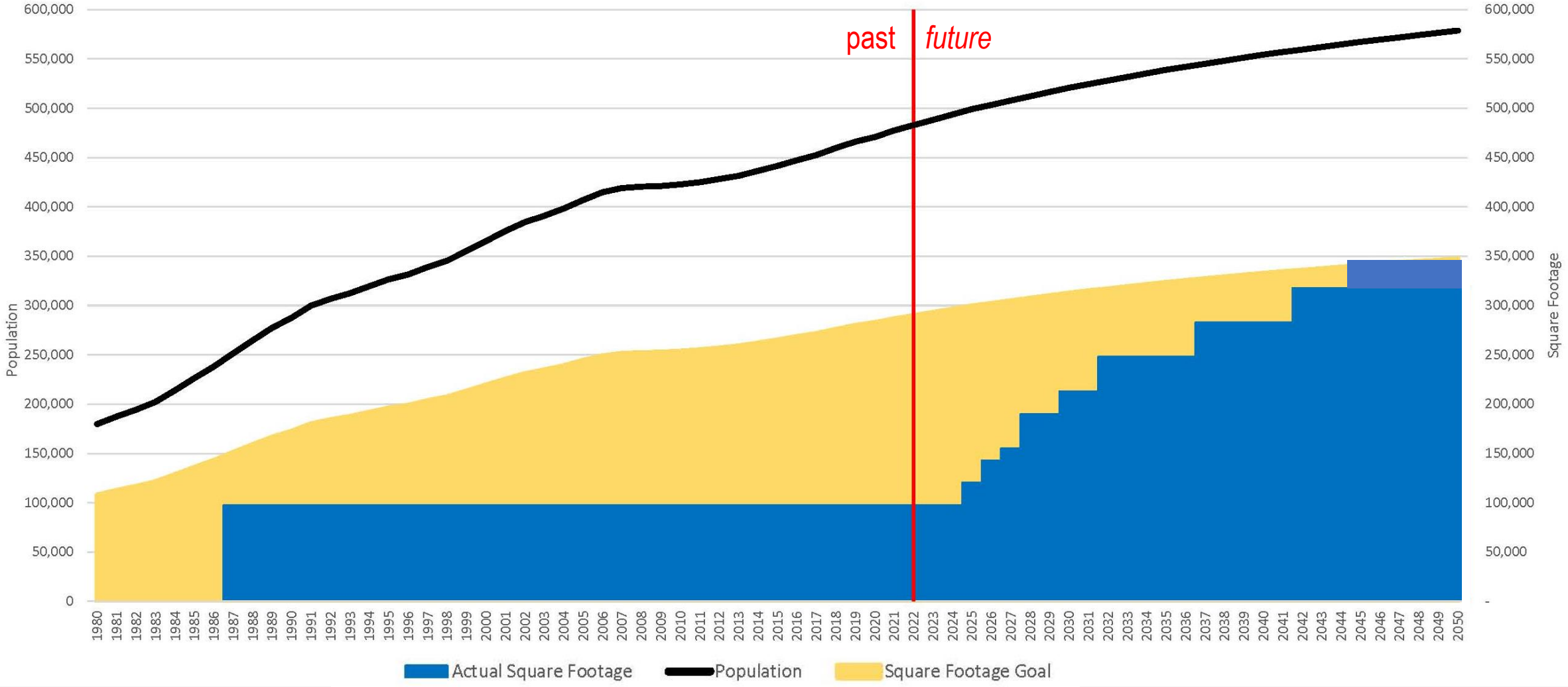
Half Moon Bay Library, San Mateo County Libraries, California

Library Space

Preliminary 5-, 10- & 20-year goals:

1. 3 new 35,000 SF Branch Libraries & 3 kiosks
2. New Admin Center @ Five Points, renovate Central Library & 2 more 35,000 SF Branches
3. 2 to 3 more Branches

Population & Square Footage 1980-2050



Mixed-Use: Library & Affordable Housing

Taylor Street Apartments & Little Italy Branch Library, Chicago Public Library, Chicago, Illinois

Little Italy Branch of the Chicago Public Library, Chicago, Illinois

Library Staff

To exceed minimum Florida Standards each Phase:

- Automate to streamline workflow
- Add paraprofessionals to support professional Librarians
- Improve Admin span of control

Success Public Library, Cockburn, Australia

Technology

Capital improvements:

- RFID/self-check-out/ automated sorting
- Lending laptops/ tablets & hotspots
- 24/7 unstaffed operations: lending lockers, computer access

Lending Locker

Chapel Hill Public Library, Chapel Hill, North Carolina

Library Funding

Preliminary 5-, 10- & 20-year goals:

1. Dedicated millage for Libraries
2. Increase Library budget to $30.00 per capita (in 2022 dollars)
3. Increase Library % of total County budget to +/- 5.0%


The future belongs to those who plan for it!
Binhai Library, Tianjin, China

2 Seminole County Public Library Market Penetration

- FY2018-2019 Data on Library Circulation & Borrowers from the Florida Division of Library & Information Services, Table 9

Table 9 - Circulation and Borrowers - FY 2019-20

Service area population data is from *Florida Estimates of Population* , published by the University of Florida, Bureau of Economic and Business Research. All other data is supplied to the Division of Library and Information Services by public libraries.

NC-Not Counted, NR-Not Reported

Service Population Over 750,001										
Location	**Service Area Population**	**Adult Circulation**	**Children's Circulation**	**Total Annual Circulation**	**Resident Borrowers**	**Non-Resident Borrowers**	**Total Borrowers**	**Circulation Per Borrower**	**Non-Resident User's Fee**	**Updated Borrowers File?**
Miami-Dade Public Library System	2,454,190	1,888,650	1,591,705	3,480,355	1,424,208	44,425	1,468,633	2	$65	Yes
Broward County Libraries Division	1,932,212	4,934,303	1,471,354	6,405,657	1,131,032	20,373	1,151,405	6	$50	Yes
Hillsborough County Public Library Cooperative	1,478,759	3,424,743	3,257,624	6,682,367	834,892	5,607	840,499	8	$100	Yes
Orange County Library System	1,415,260	4,390,040	1,562,605	5,952,645	382,246	1,138	383,384	16	$125	Yes
Jacksonville Public Library	982,080	2,546,907	975,907	3,522,814	699,542	32,175	731,717	5	$100	Yes
Palm Beach County Library System	962,505	5,440,825	2,331,608	7,772,433	401,208	77,566	478,774	16	$95	Yes
Pinellas Public Library Cooperative Inc.	960,262	3,405,610	1,146,075	4,551,685	465,599	8,896	474,495	10	$100	Yes
Lee County Library System	750,493	3,452,398	1,114,231	4,566,629	256,144	7,461	263,605	17	$60	Yes
Service Population 100,001 - 750,000										
Location	**Service Area Population**	**Adult Circulation**	**Children's Circulation**	**Total Annual Circulation**	**Resident Borrowers**	**Non-Resident Borrowers**	**Total Borrowers**	**Circulation Per Borrower**	**Non-Resident User's Fee**	**Updated Borrowers File?**
Polk County Library Cooperative	715,090	1,575,357	739,360	2,314,717	699,108	169,698	868,806	3	$50	Yes
Brevard County Library System	606,671	2,437,443	701,496	3,138,939	234,731	865	235,596	13	$15	Yes
Volusia County Public Library	551,588	1,864,218	599,408	2,463,626	242,487	2,728	245,215	10	$50	Yes
Pasco County Public Library Cooperative	542,795	857,259	379,339	1,236,598	271,972	712	272,684	5	$25	Yes
Seminole County Public Library System	476,727	1,692,222	NC	1,692,222	343,374	778	344,152	5	$50	Yes
Sarasota County Library System	438,816	1,539,861	562,353	2,102,214	123,429	11,113	134,542	16	$40	Yes
Manatee County Public Library System	398,503	832,196	80,364	912,560	67,265	1,228	68,493	13	$20	Yes
Collier County Public Library	387,450	1,267,712	364,086	1,631,798	179,649	5,779	185,428	9	$10	Yes
Osceola County Library System	387,055	608,553	397,172	1,005,725	87,376	7,537	94,913	11	$25	Yes
PAL Public Library Cooperative	387,010	2,183,835	829,706	3,013,541	219,663	20,686	240,349	13	$30	Yes
Marion County Public Library System	368,135	500,566	205,748	706,314	199,119	9,473	208,592	3	$20	Yes
Lake County Library System	366,742	799,090	740,586	1,539,676	115,329	4,476	119,805	13	$40	Yes
West Florida Public Library	323,714	262,084	161,323	423,407	219,537	291	219,828	2	$50	Yes
St. Lucie County Library System	322,265	409,390	205,477	614,867	182,386	474	182,860	3	$15	Yes
Leon County Public Library System	299,484	879,303	467,582	1,346,885	126,739	2,213	128,952	10	$30	Yes
St. Johns County Public Library System	261,900	726,864	492,911	1,219,775	91,635	3,680	95,315	13	$50	Yes
Hialeah Public Libraries	239,956	14,891	8,693	23,584	28,426	3,412	31,838	1	$20	Yes
Heartland Library Cooperative	225,080	294,772	116,688	411,460	181,229	5,051	186,280	2	$20	Yes
Clay County Public Library System	219,575	227,819	110,837	338,656	96,008	3,057	99,065	3	$100	No
Okaloosa County Public Library Cooperative	203,951	472,241	209,168	681,409	61,783	1,708	63,491	11	$35	Yes
Northwest Regional Library System	197,709	214,062	117,735	331,797	75,729	1,941	77,670	4	$15	Yes
Hernando County Public Library System	192,186	366,016	72,565	438,581	89,937	3,003	92,940	5	$15	Yes
Charlotte County Library System	187,904	840,424	109,654	950,078	64,834	4,496	69,330	14	$35	Yes
Santa Rosa County Library System	184,653	175,559	136,183	311,742	72,184	304	72,488	4	$50	Yes
Martin County Library System	161,301	456,956	100,594	557,550	96,597	4,691	101,288	6	$50	Yes
Indian River County Library	158,834	575,652	123,829	699,481	117,420	1,848	119,268	6	$30	Yes
Citrus County Library System	149,383	377,191	75,447	452,638	60,398	3,090	63,488	7	$15	Yes
Sumter County Library System	141,422	585,330	52,855	638,185	74,652	NC	74,652	9	$0	Yes
Mandel Public Library of West Palm Beach	116,781	389,915	99,341	489,256	43,989	46,225	90,214	5	$0	Yes
Flagler County Public Library	114,173	280,833	97,658	378,491	59,134	2,036	61,170	6	$50	Yes
Service Population 25,001 - 100,000										
Location	**Service Area Population**	**Adult Circulation**	**Children's Circulation**	**Total Annual Circulation**	**Resident Borrowers**	**Non-Resident Borrowers**	**Total Borrowers**	**Circulation Per Borrower**	**Non-Resident User's Fee**	**Updated Borrowers File?**
Boca Raton Public Library	95,139	632,518	165,113	797,631	42,780	1,714	44,494	18	$152	Yes
Helen B. Hoffman Plantation Library	90,802	35,000	30,000	65,000	11,714	764	12,478	5	$30	Yes
Nassau County Public Library System	89,258	70,687	37,972	108,659	58,651	143	58,794	2	$40	Yes
Panhandle Public Library Cooperative System	81,077	59,520	17,300	76,820	29,264	867	30,131	3	$25	Yes
Suwannee River Regional Library System	78,987	103,239	38,034	141,273	65,918	35	65,953	2	$15	Yes
Boynton Beach City Library	78,495	60,553	15,524	76,077	14,883	13	14,896	5	$30	Yes
Monroe County Public Library System	77,823	219,563	66,415	285,978	26,725	600	27,325	10	$30	Yes
Walton County Public Library System	74,724	43,919	40,429	84,348	44,357	1,433	45,790	2	$35	Yes
New River Public Library Cooperative	72,667	76,658	28,798	105,456	34,922	1,265	36,187	3	$12	Yes
Columbia County Public Library	70,617	150,392	57,964	208,356	8,424	791	9,215	23	$25	Yes
Delray Beach Public Library	67,168	97,249	34,667	131,916	26,003	19,768	45,771	3	$20	Yes
Three Rivers Regional Library System	66,058	84,475	16,357	100,832	22,750	NC	22,750	4	$0	Yes
North Miami Public Library	65,089	3,368	5,620	8,988	16,537	14,508	31,045	0	$50	Yes
Wilderness Coast Public Libraries	60,239	51,556	19,811	71,367	13,925	559	14,484	5	$30	Yes
North Miami Beach Public Library	47,722	129,770	68,577	198,347	19,903	19,433	39,336	5	$30	Yes
Gadsden County Public Library System	46,226	13,520	8,300	21,820	43,530	NC	43,530	1	$5	Yes
Ethel M. Gordon Oakland Park Library	45,709	16,503	8,537	25,040	35,485	NC	35,485	1	$0	Yes
Altamonte Springs City Library	45,304	22,359	14,801	37,160	9,711	2,317	12,028	3	$30	Yes
Hendry County Library Cooperative	40,953	38,004	6,810	44,814	31,066	947	32,013	1	$10	Yes
Fort Myers Beach Public Library	39,678	37,003	4,116	41,119	3,930	556	4,486	9	$10	Yes
Lake Worth Beach Public Library	38,875	7,862	1,094	8,956	19,679	NC	19,679	0	$35	Yes
Riviera Beach Public Library	36,057	2,657	1,516	4,173	2,160	117	2,277	2	$25	Yes
Parkland Library	35,438	NR	NR	NR	NR	NR	NR	NR	NR	NR
Winter Park Public Library	30,630	165,150	109,439	274,589	12,546	1,502	14,048	20	$125	Yes
Washington County Public Library	25,334	18,738	11,807	30,545	7,046	64	7,110	4	$20	Yes
Service Population 25,000 and Under										
Location	**Service Area Population**	**Adult Circulation**	**Children's Circulation**	**Total Annual Circulation**	**Resident Borrowers**	**Non-Resident Borrowers**	**Total Borrowers**	**Circulation Per Borrower**	**Non-Resident User's Fee**	**Updated Borrowers File?**
Palm Springs Public Library	23,867	7,282	3,987	11,269	15,762	6,209	21,971	1	$75	Yes
Maitland Public Library	21,113	52,698	42,860	95,558	8,744	124	8,868	11	$60	Yes
Lynn Haven Public Library	20,235	NR	NR	NR	NR	NR	NR	NR	NR	NR
New Port Richey Public Library	16,935	141,112	34,517	175,629	18,371	2	18,373	10	$25	Yes
Richard C. Sullivan Public Library	12,857	14,835	7,705	22,540	5,310	9,494	14,804	2	$96	Yes
North Palm Beach Public Library	12,813	49,270	13,948	63,218	4,204	4,166	8,370	8	$25	Yes
Lantana Public Library	12,081	9,097	NC	9,097	9,907	6,131	16,038	1	$20	Yes
Brockway Memorial Library	10,817	42,472	NC	42,472	6,079	383	6,462	7	$25	Yes
Doreen Gauthier Lighthouse Point Library	10,536	NC	NC	22,422	4,386	566	4,952	5	$50	Yes
Citrus Springs Memorial Library	9,011	NR	NR	NR	NR	NR	NR	NR	NR	NR
Lake Park Public Library	8,912	3,283	1,576	4,859	8,863	5,672	14,535	0	$0	Yes
Sanibel Public Library	6,849	149,743	NC	149,743	7,286	3,035	10,321	15	$10	Yes
Flagler Beach Library	4,700	NR	NR	NR	NR	NR	NR	NR	NR	NR
Indian Rocks Beach Library	4,158	11,489	1,540	13,029	2,137	344	2,481	5	$25	Yes
Highland Beach Library	3,657	NR	NR	NR	NR	NR	NR	NR	NR	NR
Apalachicola Municipal Library	2,350	NR	NR	NR	NR	NR	NR	NR	NR	NR
Shalimar Public Library	844	NR	NR	NR	NR	NR	NR	NR	NR	NR
J. Turner Moore Memorial Library	428	NR	NR	NR	NR	NR	NR	NR	NR	NR
Total Florida Circulation and Borrowers - FY 2019-20	**21,944,846**	**55,812,634**	**22,724,401**	**78,559,457**	**10,813,948**	**623,756**	**11,437,704**			**Yes = 72**
Average Florida Circulation and Borrowers - FY 2019-20								**7**	**$39**	**No or NR = 9**

3 Seminole County Peer Public Library Comparisons

- Statistical Comparisons with Other Florida County Public Libraries

Seminole County Public Library System – Comparison to Peer Libraries

Facilities and hours

Location	*LSA Service Area Population*	*Service Outlets - Central*	*Service Outlets - Branch*	*Service Outlets - Mobile*	*Service Outlets - Total*	*# of Facilities (excluding mobile)*	*Square Feet*	*Annual Public Service Hours*	*Hours Per Week*	*Sunday Hours*
Orange County Library System	1,334,745	1	15	-	16	16	463,466	48,828	65	Yes
Lee County Library System	735,148	-	14	1	15	14	324,972	34,069	58	No
Volusia County Public Library	538,763	-	14	-	14	14	254,016	34,090	60	Yes
Seminole County Public Library System	471,735	1	4	-	5	5	98,000	16,045	64	Yes
Osceola County Library System	370,552	1	5	-	6	6	94,421	19,157	72	Yes
Lake County Library System	335,879	-	15	-	15	15	238,457	36,712	49	No
Alachua County Library District	267,306	1	11	2	14	12	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	-	5	-	5	5	43,594	13,780	57	No
Florida state-wide Average / per capita									*54.0*	
Average for this group	*522,845*	*0.50*	*10.38*	*0*	*11*	*10.88*	*216,704*	*28,954*	*60.7*	
5th Percentile for this group	*177,169*	*-*	*4.35*	*-*	*5*	*5.00*	*58,842*	*14,460*	*51.4*	
25th Percentile for this group	*318,736*	*-*	*5.00*	*-*	*6*	*5.75*	*96,211*	*17,601*	*57.5*	
50th Percentile for this group	*421,144*	*0.50*	*12.50*	*-*	*14*	*13.00*	*238,457*	*34,069*	*60.0*	
75th Percentile for this group	*587,859*	*1.00*	*14.25*	*0*	*15*	*14.25*	*289,494*	*35,401*	*64.5*	
90th Percentile for this group	*915,027*	*1.00*	*15.00*	*1*	*15*	*15.30*	*380,370*	*41,558*	*67.8*	

Facilities per population and area

Location	*LSA Service Area Population*	*# of Facilities (excluding mobile)*	*# of Facilities per 100,000 capita*	*# facilities per 100 sq.mi. of total area*	*# facilities per 100 sq.mi. of land area*	*Square Feet*	*sq. ft. per capita*	*sq. ft. per sq. mi. of total area*	*sq. ft. per sq. mi. of land area*
Orange County Library System	1,334,745	16	1.20	1.59	1.76	463,466	0.35	461.53	510.73
Lee County Library System	735,148	14	1.90	1.16	1.74	324,972	0.44	268.15	404.38
Volusia County Public Library	538,763	14	2.60	0.98	1.27	254,016	0.47	177.33	230.24
Seminole County Public Library System	471,735	5	1.06	1.45	1.62	98,000	0.21	284.17	317.98
Osceola County Library System	370,552	6	1.62	0.40	0.45	94,421	0.25	62.68	71.43
Lake County Library System	335,879	15	4.47	1.30	1.57	238,457	0.71	206.21	250.18
Alachua County Library District	267,306	12	4.49	1.24	1.37	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	5	3.89	0.86	0.92	43,594	0.34	75.12	79.88
Florida state-wide Average / per capita							*0.48*		
Average for this group	*522,845*	*10.88*	*2.65*	*1.12*	*1.34*	*216,704*	*0.40*	*219.31*	*266.40*
5th Percentile for this group	*177,169*	*5.00*	*1.11*	*0.56*	*0.62*	*58,842*	*0.22*	*66.41*	*73.96*
25th Percentile for this group	*318,736*	*5.75*	*1.51*	*0.95*	*1.18*	*96,211*	*0.30*	*126.23*	*155.06*
50th Percentile for this group	*421,144*	*13.00*	*2.25*	*1.20*	*1.47*	*238,457*	*0.35*	*206.21*	*250.18*
75th Percentile for this group	*587,859*	*14.25*	*4.03*	*1.34*	*1.65*	*289,494*	*0.46*	*276.16*	*361.18*
90th Percentile for this group	*915,027*	*15.30*	*4.47*	*1.49*	*1.75*	*380,370*	*0.57*	*355.11*	*446.92*

Staff

Location	*LSA Service Area Population*	*Staff With M.L.S. (FTE)*	*Total Paid Library Staff (FTE)*	*Non-MLS Staff*	*Staff Paid by Others*	*Volunteer Hours*	*MLS Staff per 1,000 capita*	*Total staff per 1,000 capita*	*Percent of (Full-time) Staff with M.L.S.*
Orange County Library System	1,334,745	34.0	338.0	304.0	0.0	19,533	0.03	0.25	10%
Lee County Library System	735,148	80.0	231.5	151.5	0.0	19,192	0.11	0.31	35%
Volusia County Public Library	538,763	60.0	184.8	124.8	0.0	38,278	0.11	0.34	32%
Seminole County Public Library System	471,735	26.5	75.0	48.5	0.0	21,776	0.06	0.16	35%
Osceola County Library System	370,552	9.0	57.0	48.0	0.0	4,041	0.02	0.15	16%
Lake County Library System	335,879	23.0	120.8	97.8	1.0	26,763	0.07	0.36	19%
Alachua County Library District	267,306	n/a	201.76	n/a	n/a	19,771	n/a	0.75	n/a
Sumter County Library System	128,633	4.0	38.5	34.5	0.0	-	0.03	0.30	10%
Florida state-wide Average / per capita							*0.08*	*0.38*	*30%*
Average for this group	*522,845*	*34*	*155.9*	*116*	*0.1*	*18,669*	*0.06*	*0.33*	*22%*
5th Percentile for this group	*177,169*	*6*	*45.0*	*39*	*-*	*1,414*	*0.02*	*0.16*	*10%*
25th Percentile for this group	*318,736*	*16*	*70.5*	*48*	*-*	*15,404*	*0.03*	*0.23*	*13%*
50th Percentile for this group	*421,144*	*27*	*152.8*	*98*	*-*	*19,652*	*0.06*	*0.31*	*19%*
75th Percentile for this group	*587,859*	*47*	*209.2*	*138*	*-*	*23,023*	*0.09*	*0.35*	*34%*
90th Percentile for this group	*915,027*	*68*	*263.5*	*213*	*0.4*	*30,218*	*0.11*	*0.48*	*35%*

Staff expenditures and salaries

Location	*LSA Service Area Population*	*Salaries and Wages*	*Employee Benefits*	*Staff Total Expenditures*	*Director Salary*	*Starting Librarian Salary*
Orange County Library System	1,334,745	$ 17,021,919	$ 7,259,948	$ 24,281,867	$ 239,054	$ 52,270
Lee County Library System	735,148	$ 10,739,785	$ 4,917,771	$ 15,657,556	$ 132,613	$ 39,864
Volusia County Public Library	538,763	$ 6,841,534	$ 3,102,957	$ 9,944,491	$ 115,542	$ 41,382
Seminole County Public Library System	471,735	$ 2,789,239	$ 1,008,934	$ 3,798,173	$ 94,892	$ 37,149
Osceola County Library System	370,552	$ 1,905,432	$ 646,062	$ 2,551,494	$ 59,598	$ 38,500
Lake County Library System	335,879	$ 4,059,921	$ 1,501,469	$ 5,561,390	$ 90,000	$ 31,000
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	$ 20,095	$ 6,097	$ 26,192	$ 68,486	$ 68,486
Florida state-wide Average / per capita					*$ 90,693*	*$ 38,746*
Average for this group	*522,845*	*$ 6,196,846*	*$ 2,634,748*	*$ 8,831,595*	*$ 114,312*	*$ 44,093*
5th Percentile for this group	*177,169*	*$ 585,696*	*$ 198,087*	*$ 783,783*	*$ 62,264*	*$ 32,845*
25th Percentile for this group	*318,736*	*$ 2,347,336*	*$ 827,498*	*$ 3,174,834*	*$ 79,243*	*$ 37,825*
50th Percentile for this group	*421,144*	*$ 4,059,921*	*$ 1,501,469*	*$ 5,561,390*	*$ 94,892*	*$ 39,864*
75th Percentile for this group	*587,859*	*$ 8,790,660*	*$ 4,010,364*	*$ 12,801,024*	*$ 124,078*	*$ 46,826*
90th Percentile for this group	*915,027*	*$ 13,252,639*	*$ 5,854,642*	*$ 19,107,280*	*$ 175,189*	*$ 58,756*

Revenue

Location	*LSA Service Area Population*	*Local Revenue*	*State Revenue*	*Federal Revenue*	*Other Revenue*	*Total Operating Income*
Orange County Library System	1,334,745	$ 44,696,855	$ 836,667	$ 56,333	$ 1,974,296	$ 47,564,151
Lee County Library System	735,148	$ 33,104,469	$ 594,853	$ 2,875	$ 1,389,043	$ 35,091,240
Volusia County Public Library	538,763	$ 18,039,775	$ 376,694	$ 6,349	$ 1,175,855	$ 19,598,673
Seminole County Public Library System	471,735	$ 6,085,317	$ 148,756	$ 2,875	$ 35,566	$ 6,272,514
Osceola County Library System	370,552	$ 7,639,271	$ 166,424	$ 2,875	$ 173,010	$ 7,981,580
Lake County Library System	335,879	$ 7,877,867	$ 171,395	$ 16,181	$ 158,615	$ 8,224,058
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	$ 18,622,166
Sumter County Library System	128,633	$ 2,816,631	$ 181,075	$ -	$ 57,831	$ 3,055,537
Florida state-wide Average / per capita						
Average for this group	*522,845*	*$ 17,180,026*	*$ 353,695*	*$ 12,498*	*$ 709,174*	*$ 18,301,240*
5th Percentile for this group	*177,169*	*$ 3,797,237*	*$ 154,056*	*$ 863*	*$ 42,246*	*$ 4,181,479*
25th Percentile for this group	*318,736*	*$ 6,862,294*	*$ 168,910*	*$ 2,875*	*$ 108,223*	*$ 7,554,314*
50th Percentile for this group	*421,144*	*$ 7,877,867*	*$ 181,075*	*$ 2,875*	*$ 173,010*	*$ 13,423,112*
75th Percentile for this group	*587,859*	*$ 25,572,122*	*$ 485,774*	*$ 11,265*	*$ 1,282,449*	*$ 23,471,815*
90th Percentile for this group	*915,027*	*$ 37,741,423*	*$ 691,579*	*$ 32,242*	*$ 1,623,144*	*$ 38,833,113*

Revenue per capita and percents

Location	*LSA Service Area Population*	*Local Revenue per capita*	*State Revenue per capita*	*Total Revenue per capita*	*Percent Local Revenue*	*Percent State Revenue*	*Percent Federal Revenue*	*Percent Other Revenue*
Orange County Library System	1,334,745	$ 33.49	$ 0.63	$ 35.64	93.97%	1.76%	0.12%	4.15%
Lee County Library System	735,148	$ 45.03	$ 0.81	$ 47.73	94.34%	1.70%	0.01%	3.96%
Volusia County Public Library	538,763	$ 33.48	$ 0.70	$ 36.38	92.05%	1.92%	0.03%	6.00%
Seminole County Public Library System	471,735	$ 12.90	$ 0.32	$ 13.30	97.02%	2.37%	0.05%	0.57%
Osceola County Library System	370,552	$ 20.62	$ 0.45	$ 21.54	95.71%	2.09%	0.04%	2.17%
Lake County Library System	335,879	$ 23.45	$ 0.51	$ 24.49	95.79%	2.08%	0.20%	1.93%
Alachua County Library District	267,306	n/a	n/a	$ 69.67	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	$ 21.90	$ 1.41	$ 23.75	92.18%	5.93%	0.00%	1.89%
Florida state-wide Average / per capita		*$ 31.50*	*$ 1.00*	*$ 31.33*				
Average for this group	*522,845*	*$ 27.27*	*$ 0.69*	*$ 34.06*	*94.44%*	*2.55%*	*0.06%*	*2.95%*
5th Percentile for this group	*177,169*	*$ 15.21*	*$ 0.36*	*$ 16.18*	*92.09%*	*1.72%*	*0.00%*	*0.97%*
25th Percentile for this group	*318,736*	*$ 21.26*	*$ 0.48*	*$ 23.20*	*93.08%*	*1.84%*	*0.02%*	*1.91%*
50th Percentile for this group	*421,144*	*$ 23.45*	*$ 0.63*	*$ 30.06*	*94.34%*	*2.08%*	*0.04%*	*2.17%*
75th Percentile for this group	*587,859*	*$ 33.49*	*$ 0.75*	*$ 39.22*	*95.75%*	*2.23%*	*0.09%*	*4.06%*
90th Percentile for this group	*915,027*	*$ 38.10*	*$ 1.05*	*$ 54.31*	*96.28%*	*3.79%*	*0.15%*	*4.89%*

Capital revenue

Location	*LSA Service Area Population*	*Local Government Capital Income*	*State Government Capital Income*	*Federal Government Capital Income*	*Other Capital Income*	*Total Capital Income*	*Percent Local - Capital*	*Percent State - Capital*	*Percent Federal - Capital*	*Percent Other - Capital*
Orange County Library System	1,334,745	$ 181,096	$ -	$ -	$ -	$ 181,096	100%	0%	0%	0%
Lee County Library System	735,148	$ 428,778	$ -	$ -	$ -	$ 428,778	100%	0%	0%	0%
Volusia County Public Library	538,763	$ -	$ -	$ -	$ -	$ -	0%	0%	0%	0%
Seminole County Public Library System	471,735	$ -	$ -	$ -	$ -	$ -	0%	0%	0%	0%
Osceola County Library System	370,552	$ 359,097	$ -	$ -	$ -	$ 359,097	100%	0%	0%	0%
Lake County Library System	335,879	$ -	$ -	$ -	$ -	$ -	0%	0%	0%	0%
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	$ -	$ -	$ -	$ -	$ -	0%	0%	0%	0%
Florida state-wide Average / per capita										
Average for this group	*522,845*	*$ 138,424*	*$ -*	*$ -*	*$ -*	*$ 138,424*	*42.9%*	*0%*	*0%*	*0.0%*
5th Percentile for this group	*177,169*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*0.0%*	*0%*	*0%*	*0.0%*
25th Percentile for this group	*318,736*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*0.0%*	*0%*	*0%*	*0.0%*
50th Percentile for this group	*421,144*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*0.0%*	*0%*	*0%*	*0.0%*
75th Percentile for this group	*587,859*	*$ 270,097*	*$ -*	*$ -*	*$ -*	*$ 270,097*	*100.0%*	*0%*	*0%*	*0.0%*
90th Percentile for this group	*915,027*	*$ 386,969*	*$ -*	*$ -*	*$ -*	*$ 386,969*	*100.0%*	*0%*	*0%*	*0.0%*

Operating Expenditures

Location	*LSA Service Area Population*	*Print Materials Expenditures*	*Electronic Materials Expenditures*	*Other Materials Expenditures*	*Total Collection Expenditures*	*Staff Total Expenditures*	*All Other Operating Expenditures*	*Total Operating Expenditures*
Orange County Library System	1,334,745	$ 991,784	$ 2,812,708	$ 389,285	$ 4,193,777	$ 24,281,867	$ 15,497,370	$ 43,973,014
Lee County Library System	735,148	$ 2,350,038	$ 1,080,639	$ 359,366	$ 3,790,043	$ 15,657,556	$ 12,532,911	$ 31,980,510
Volusia County Public Library	538,763	$ 938,408	$ 987,031	$ 305,943	$ 2,231,382	$ 9,944,491	$ 5,438,116	$ 17,613,989
Seminole County Public Library System	471,735	$ 700,766	$ 387,852	$ 33,423	$ 1,122,041	$ 3,798,173	$ 1,527,467	$ 6,447,681
Osceola County Library System	370,552	$ 468,154	$ 297,438	$ 54,578	$ 820,170	$ 2,551,494	$ 4,523,519	$ 7,895,183
Lake County Library System	335,879	$ 472,691	$ 183,924	$ 87,481	$ 744,096	$ 5,561,390	$ 1,598,387	$ 7,903,873
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a	n/a	$ 17,229,737
Sumter County Library System	128,633	$ 549,094	$ 190,394	$ 58,676	$ 798,164	$ 26,192	$ 2,790,439	$ 3,614,795
Florida state-wide Average / per capita								
Average for this group	*522,845*	*$ 924,419*	*$ 848,569*	*$ 184,107*	*$ 1,957,096*	*$ 8,831,595*	*$ 6,272,601*	*$ 17,082,348*
5th Percentile for this group	*177,169*	*$ 469,515*	*$ 185,865*	*$ 39,770*	*$ 760,316*	*$ 783,783*	*$ 1,548,743*	*$ 4,606,305*
25th Percentile for this group	*318,736*	*$ 510,893*	*$ 243,916*	*$ 56,627*	*$ 809,167*	*$ 3,174,834*	*$ 2,194,413*	*$ 7,533,308*
50th Percentile for this group	*421,144*	*$ 700,766*	*$ 387,852*	*$ 87,481*	*$ 1,122,041*	*$ 5,561,390*	*$ 4,523,519*	*$ 12,566,805*
75th Percentile for this group	*587,859*	*$ 965,096*	*$ 1,033,835*	*$ 332,655*	*$ 3,010,713*	*$ 12,801,024*	*$ 8,985,514*	*$ 21,205,619*
90th Percentile for this group	*915,027*	*$ 1,535,086*	*$ 1,773,467*	*$ 371,334*	*$ 3,951,537*	*$ 19,107,280*	*$ 13,718,695*	*$ 35,578,261*

Expenditures per capita, percents, and capital expenditures

Location	*LSA Service Area Population*	*Staff Expenditures Per Capita*	*Collection Expenditures Per Capita*	*Total Expenditures Per Capita*	*Percent Expenditures Staff*	*Percent Expenditures Collection*	*Percent Expenditures Other*	*Capital Outlay*
Orange County Library System	1,334,745	$ 18.19	$ 3.14	$ 32.94	55.22%	9.54%	35.24%	$ 1,665,804
Lee County Library System	735,148	$ 21.30	$ 5.16	$ 43.50	48.96%	11.85%	39.19%	$ 12,665,148
Volusia County Public Library	538,763	$ 18.46	$ 4.14	$ 32.69	56.46%	12.67%	30.87%	$ 91,996
Seminole County Public Library System	471,735	$ 8.05	$ 2.38	$ 13.67	58.91%	17.40%	23.69%	$ 27,565
Osceola County Library System	370,552	$ 6.89	$ 2.21	$ 21.31	32.32%	10.39%	57.29%	$ 132,475
Lake County Library System	335,879	$ 16.56	$ 2.22	$ 23.53	70.36%	9.41%	20.22%	$ 1,007,895
Alachua County Library District	267,306	n/a	n/a	$ 64.46	n/a	n/a	n/a	$ 1,226,000
Sumter County Library System	128,633	$ 0.20	$ 6.20	$ 28.10	0.72%	22.08%	77.19%	$ -
Florida state-wide Average / per capita		*$ 17.11*	*$ 3.26*	*$ 28.89*	*64.75%*	*10.61%*	*24.97%*	
Average for this group	*522,845*	*$ 12.81*	*$ 3.64*	*$ 32.52*	*46.14%*	*13.33%*	*40.53%*	*2,102,110*
5th Percentile for this group	*177,169*	*$ 2.21*	*$ 2.21*	*$ 16.34*	*10.20%*	*9.45%*	*21.26%*	*9,648*
25th Percentile for this group	*318,736*	*$ 7.47*	*$ 2.30*	*$ 22.98*	*40.64%*	*9.97%*	*27.28%*	*75,888*
50th Percentile for this group	*421,144*	*$ 16.56*	*$ 3.14*	*$ 30.40*	*55.22%*	*11.85%*	*35.24%*	*570,185*
75th Percentile for this group	*587,859*	*$ 18.33*	*$ 4.65*	*$ 35.58*	*57.69%*	*15.04%*	*48.24%*	*1,335,951*
90th Percentile for this group	*915,027*	*$ 19.59*	*$ 5.58*	*$ 49.79*	*63.49%*	*19.27%*	*65.25%*	*4,965,607*

Collection

Location	*LSA Service Area Population*	*Books*	*Electronic Books (eBooks)*	*Electronic Databases*	*Current Print Serial Subscriptions*	*Audio - Physical Units*	*Video - Physical Units*	*Total collection size*	*print materials holdings per capita*	*physical audio holdings per 1000 capita*	*physical video holdings per 1000 capita*	*Total collection holdings per capita*
Orange County Library System	1,334,745	1,150,177	682,475	101	788	47,462	290,017	2,171,020	0.86	35.56	217.28	1.63
Lee County Library System	735,148	856,218	533,471	114	1,787	75,739	224,977	1,692,306	1.16	103.03	306.03	2.30
Volusia County Public Library	538,763	494,780	691,935	102	818	40,818	94,785	1,323,238	0.92	75.76	175.93	2.46
Seminole County Public Library System	471,735	532,235	363,363	86	432	23,219	7,003	926,338	1.13	49.22	14.85	1.96
Osceola County Library System	370,552	192,674	377,382	83	194	8,789	19,246	598,368	0.52	23.72	51.94	1.61
Lake County Library System	335,879	497,336	17,689	76	459	31,014	62,165	608,739	1.48	92.34	185.08	1.81
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a	n/a	796,674	n/a	n/a	n/a	2.98
Sumter County Library System	128,633	76,759	9,985	77	40	3,951	20,291	111,103	0.60	30.72	157.74	0.86
Florida state-wide Average / per capita									*1.20*	*76.27*	*159.83*	*1.44*
Average for this group	*522,845*	*542,883*	*382,329*	*91*	*645*	*32,999*	*102,641*	*1,028,473*	*0.95*	*59*	*158*	*1.95*
5th Percentile for this group	*177,169*	*111,534*	*12,296*	*76*	*86*	*5,402*	*10,676*	*281,646*	*0.54*	*26*	*26*	*1.13*
25th Percentile for this group	*318,736*	*343,727*	*190,526*	*80*	*313*	*16,004*	*19,769*	*606,146*	*0.73*	*33*	*105*	*1.62*
50th Percentile for this group	*421,144*	*497,336*	*377,382*	*86*	*459*	*31,014*	*62,165*	*861,506*	*0.92*	*49*	*176*	*1.89*
75th Percentile for this group	*587,859*	*694,227*	*607,973*	*102*	*803*	*44,140*	*159,881*	*1,415,505*	*1.15*	*84*	*201*	*2.34*
90th Percentile for this group	*915,027*	*973,802*	*686,259*	*107*	*1,206*	*58,773*	*250,993*	*1,835,920*	*1.29*	*97*	*253*	*2.61*

Circulation

Location	*LSA Service Area Population*	*Adult Circulation*	*Children's Circulation*	*Total Annual Circulation*	*Circulation per capita*	*Children's Circulation per capita*
Orange County Library System	1,334,745	5,638,100	1,929,621	7,567,721	5.67	1.45
Lee County Library System	735,148	4,201,020	1,745,981	5,947,001	8.09	2.38
Volusia County Public Library	538,763	2,147,058	902,276	3,049,334	5.66	1.67
Seminole County Public Library System	471,735	1,779,362	n/a	1,779,362	3.77	n/a
Osceola County Library System	370,552	638,731	578,013	1,216,744	3.28	1.56
Lake County Library System	335,879	975,670	551,993	1,527,663	4.55	1.64
Alachua County Library District	267,306	n/a	n/a	4,013,932	15.02	n/a
Sumter County Library System	128,633	981,681	78,540	1,060,221	8.24	0.61
Florida state-wide Average / per capita					*4.65*	*1.53*
Average for this group	*522,845*	*2,337,375*	*964,404*	*3,270,247*	*6.79*	*1.55*
5th Percentile for this group	*177,169*	*739,813*	*196,903*	*1,115,004*	*3.45*	*0.82*
25th Percentile for this group	*318,736*	*978,676*	*558,498*	*1,449,933*	*4.35*	*1.47*
50th Percentile for this group	*421,144*	*1,779,362*	*740,145*	*2,414,348*	*5.66*	*1.60*
75th Percentile for this group	*587,859*	*3,174,039*	*1,535,055*	*4,497,199*	*8.13*	*1.67*
90th Percentile for this group	*915,027*	*4,775,852*	*1,837,801*	*6,433,217*	*10.27*	*2.02*

Borrowers

Location	*LSA Service Area Population*	*Resident Borrowers*	*Non-Resident Borrowers*	*Total Borrowers*	*Percent of (resident) population with Library Cards*	*Circulation Per Borrower*	*Non-Resident User's Fee*	*Updated Borrowers File?*
Orange County Library System	1,334,745	395,828	3,534	399,362	29.7%	19	$ 125.00	Yes
Lee County Library System	735,148	268,154	7,769	275,923	36.5%	22	$ 60.00	Yes
Volusia County Public Library	538,763	246,850	2,921	249,771	45.8%	12	$ 50.00	Yes
Seminole County Public Library System	471,735	345,856	779	346,635	73.3%	5	$ 50.00	Yes
Osceola County Library System	370,552	75,257	7,771	83,028	20.3%	15	$ 25.00	Yes
Lake County Library System	335,879	121,568	6,789	128,357	36.2%	12	$ 10.00	Yes
Alachua County Library District	267,306	n/a	n/a	190,122	71.1%	n/a	n/a	n/a
Sumter County Library System	128,633	70,281	-	70,281	54.6%	15	$ -	Yes
Florida state-wide Average / per capita					*52.0%*	*8*	*$ 40.14*	
Average for this group	*522,845*	*217,685*	*4,223*	*217,935*	*45.9%*	*14*	*$ 45.71*	
5th Percentile for this group	*177,169*	*71,774*	*234*	*74,742*	*23.6%*	*7*	*$ 3.00*	
25th Percentile for this group	*318,736*	*98,413*	*1,850*	*117,025*	*34.6%*	*12*	*$ 17.50*	
50th Percentile for this group	*421,144*	*246,850*	*3,534*	*219,947*	*41.1%*	*15*	*$ 50.00*	
75th Percentile for this group	*587,859*	*307,005*	*7,279*	*293,601*	*58.8%*	*17*	*$ 55.00*	
90th Percentile for this group	*915,027*	*365,845*	*7,770*	*362,453*	*71.8%*	*20*	*$ 86.00*	

Visits, Reference, and ILL

Location	*LSA Service Area Population*	*Library Visits*	*Visits per capita*	*Traditional Reference*	*Virtual Reference*	*Total Reference*	*Reference transactions per capita*	*ILL Provided*	*ILL Received*	*Reciprocal Borrowing*
Orange County Library System	1,334,745	3,320,707	2.49	1,277,069	4,860	1,281,929	0.96	-	-	Yes
Lee County Library System	735,148	1,936,142	2.63	684,163	13,834	697,997	0.95	3,864	5,662	Yes
Volusia County Public Library	538,763	2,204,296	4.09	666,695	1,736	668,431	1.24	873	164	Yes
Seminole County Public Library System	471,735	1,695,063	3.59	876,902	2,499	879,401	1.86	-	-	Yes
Osceola County Library System	370,552	923,963	2.49	291,049	1,081	292,130	0.79	264	1,246	Yes
Lake County Library System	335,879	1,481,278	4.41	222,738	2,224	224,962	0.67	-	-	Yes
Alachua County Library District	267,306	1,309,178	4.90	n/a	n/a	295,892	1.11	n/a	n/a	n/a
Sumter County Library System	128,633	311,821	2.42	15,897	408	16,305	0.13	321	4,449	Yes
Florida state-wide Average / per capita		*3*					*0.92*			
Average for this group	*522,845*	*1,647,806*	*3.38*	*576,359*	*3,806*	*544,631*	*0.96*	*760*	*1,646*	
5th Percentile for this group	*177,169*	*526,071*	*2.45*	*77,949*	*610*	*89,335*	*0.32*	*-*	*-*	
25th Percentile for this group	*318,736*	*1,212,874*	*2.49*	*256,894*	*1,409*	*275,338*	*0.76*	*-*	*-*	
50th Percentile for this group	*421,144*	*1,588,171*	*3.11*	*666,695*	*2,224*	*482,162*	*0.95*	*264*	*164*	
75th Percentile for this group	*587,859*	*2,003,181*	*4.17*	*780,533*	*3,680*	*743,348*	*1.14*	*597*	*2,848*	
90th Percentile for this group	*915,027*	*2,539,219*	*4.56*	*1,036,969*	*8,450*	*1,000,159*	*1.43*	*2,069*	*4,934*	

Programs and Program Attendance

Location	*LSA Service Area Population*	*Adult Programs*	*Adult Attendance*	*Young Adult Programs*	*Young Adult Attendance*	*Children's Programs*	*Children's Attendance*	*All-Ages Programs*	*All-Ages Attendance*	*Total Programs*	*Total Program Attendance*	*Total Program Attendance per capita*
Orange County Library System	1,334,745	22,120	259,645	1,195	15,375	10,104	328,348	974	37,263	34,393	640,631	0.48
Lee County Library System	735,148	1,576	25,305	508	22,148	1,905	82,565	n/a	n/a	3,989	130,018	0.18
Volusia County Public Library	538,763	3,086	53,209	1,151	19,281	3,893	86,666	1,028	18,260	9,158	177,416	0.33
Seminole County Public Library System	471,735	907	13,390	160	2,836	2,126	71,009	n/a	n/a	3,193	87,235	0.18
Osceola County Library System	370,552	1,690	5,460	172	1,826	1,284	35,361	33	2,070	3,179	44,717	0.12
Lake County Library System	335,879	3,337	37,218	1,159	20,661	3,078	113,794	n/a	n/a	7,574	171,673	0.51
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10,094	156,579	0.59
Sumter County Library System	128,633	374	3,724	3	2	356	4,697	n/a	n/a	733	8,423	0.07
Florida state-wide Average / per capita												*0*
Average for this group	*522,845*	*4,727*	*56,850*	*621*	*11,733*	*3,249*	*103,206*	*678*	*19,198*	*9,039*	*177,087*	*0.31*
5th Percentile for this group	*177,169*	*534*	*4,245*	*50*	*549*	*634*	*13,896*	*127*	*3,689*	*1,589*	*21,126*	*0.08*
25th Percentile for this group	*318,736*	*1,242*	*9,425*	*166*	*2,331*	*1,595*	*53,185*	*504*	*10,165*	*3,190*	*76,606*	*0.16*
50th Percentile for this group	*421,144*	*1,690*	*25,305*	*508*	*15,375*	*2,126*	*82,565*	*974*	*18,260*	*5,782*	*143,299*	*0.26*
75th Percentile for this group	*587,859*	*3,212*	*45,214*	*1,155*	*19,971*	*3,486*	*100,230*	*1,001*	*27,762*	*9,392*	*173,109*	*0.49*
90th Percentile for this group	*915,027*	*10,850*	*135,783*	*1,173*	*21,256*	*6,377*	*199,616*	*1,017*	*33,462*	*17,384*	*316,381*	*0.53*

Electronic Access

Location	*LSA Service Area Population*	*Staff Computers*	*Public Computers*	*Website Visits*	*Electronic Users*	*Staff Receiving Technology Instruction*	*Users Receiving Technology Instruction*	*Internet Safety Education Programs Offered*	*# Internet Safety Education Program Completers*
Orange County Library System	1,334,745	400	450	4,431,824	998,483	473	61,120	Yes	123
Lee County Library System	735,148	436	522	9,199,636	284,385	564	214,051	No	-
Volusia County Public Library	538,763	260	338	3,073,968	289,916	900	103,943	No	-
Seminole County Public Library System	471,735	64	90	5,183,798	104,254	141	582,247	Yes	1,502
Osceola County Library System	370,552	79	230	327,676	211,832	70	1,141	No	-
Lake County Library System	335,879	167	391	3,076,650	262,820	105	36,915	Yes	97
Alachua County Library District	267,306	n/a	n/a	962,629	n/a	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	44	83	594,700	65,694	n/a	15,223	No	-
Florida state-wide Average / per capita									
Average for this group	*522,845*	*207*	*301*	*3,356,360*	*316,769*	*376*	*144,949*		*246*
5th Percentile for this group	*177,169*	*50*	*85*	*421,134*	*77,262*	*79*	*5,366*		*-*
25th Percentile for this group	*318,736*	*72*	*160*	*870,647*	*158,043*	*114*	*26,069*		*-*
50th Percentile for this group	*421,144*	*167*	*338*	*3,075,309*	*262,820*	*307*	*61,120*		*-*
75th Percentile for this group	*587,859*	*330*	*421*	*4,619,818*	*287,151*	*541*	*158,997*		*110*
90th Percentile for this group	*915,027*	*414*	*479*	*6,388,549*	*573,343*	*732*	*361,329*		*675*

Friends Groups

Location	*LSA Service Area Population*	*Friends Group?*	*# Friends Group Members*	*Funds Raised by Friends*	*Funds Ex-pended by Friends*	*Funds Expended by Foundation*
Orange County Library System	1,334,745	Yes	582	$ 210,828	$ 165,176	$ 16,525
Lee County Library System	735,148	Yes	1,455	$ 193,458	$ 287,680	$ -
Volusia County Public Library	538,763	Yes	6,065	$ 91,203	$ 83,791	$ 160,000
Seminole County Public Library System	471,735	Yes	n/a	$ 85,109	$ 61,416	$ -
Osceola County Library System	370,552	Yes	95	$ 5,350	$ 12,330	$ -
Lake County Library System	335,879	Yes	825	$ 219,168	$ 168,568	$ 138,148
Alachua County Library District	267,306	n/a	n/a	n/a	n/a	n/a
Sumter County Library System	128,633	Yes	n/a	n/a	n/a	n/a
Florida state-wide Average / per capita						
Average for this group	*522,845*		*1,804*	*$ 134,186*	*$ 129,827*	*$ 52,446*
5th Percentile for this group	*177,169*		*192*	*$ 25,290*	*$ 24,602*	*$ -*
25th Percentile for this group	*318,736*		*582*	*$ 86,633*	*$ 67,010*	*$ -*
50th Percentile for this group	*421,144*		*825*	*$ 142,331*	*$ 124,484*	*$ 8,263*
75th Percentile for this group	*587,859*		*1,455*	*$ 206,486*	*$ 167,720*	*$ 107,742*
90th Percentile for this group	*915,027*		*4,221*	*$ 214,998*	*$ 228,124*	*$ 149,074*

Data Source Notes

- Except as otherwise noted, data comes from Florida Division of Library and Information Services Annual Public Library Statistics for FY 2018-2019 (see link) or is calculated using data from the given sources
- Data for Alachua County comes from Alachua County Library District Comprehensive Annual Financial Report for Fiscal Year Ended September 30, 2019 (see link) or is calculated using that data
- County area comes from Census Bureau 2011 U.S. County data (see link)

Data notes

- "n/a" or blank cell indicates data that was not reported or not provided in the available sources; these cells are excluded from the average and percentile calculations
- "0" or "-" indicates that a value of zero was reported. These cells are included in the average and percentile calculations
- per capita calculations use the LSA service population figure
- Total circulation means all formats, electronic and physical
- Percent of (resident) population with library cards is calculated using resident borrowers if that data is available, otherwise with total borrowers

Links

- https://alachuacounty.us/Depts/Clerk/FinancialReports/2019/2019%20Library%20District%20CAFR.pdf
- https://dos.myflorida.com/library-archives/library-development/data/2019/
- https://www.census.gov/library/publications/2011/compendia/usa-counties-2011.html

4 Demographics Analyses of Seminole County & Local Municipalities

- Seminole County Demographics compared to Florida & the United States
- Detailed Seminole County Demographics Report
- Statistical Rankings of Seminole County Municipalities, 2025 projections
- BEBR Population Projections for Seminole County, 2020-2045
- Section Four: Population & Demographics Analysis by Godfrey's Associates

Appendix 4.2
US Census QuickFacts - Comparing Seminole County with Florida & the United States

Godfrey's Associates, Inc.
October 1, 2021

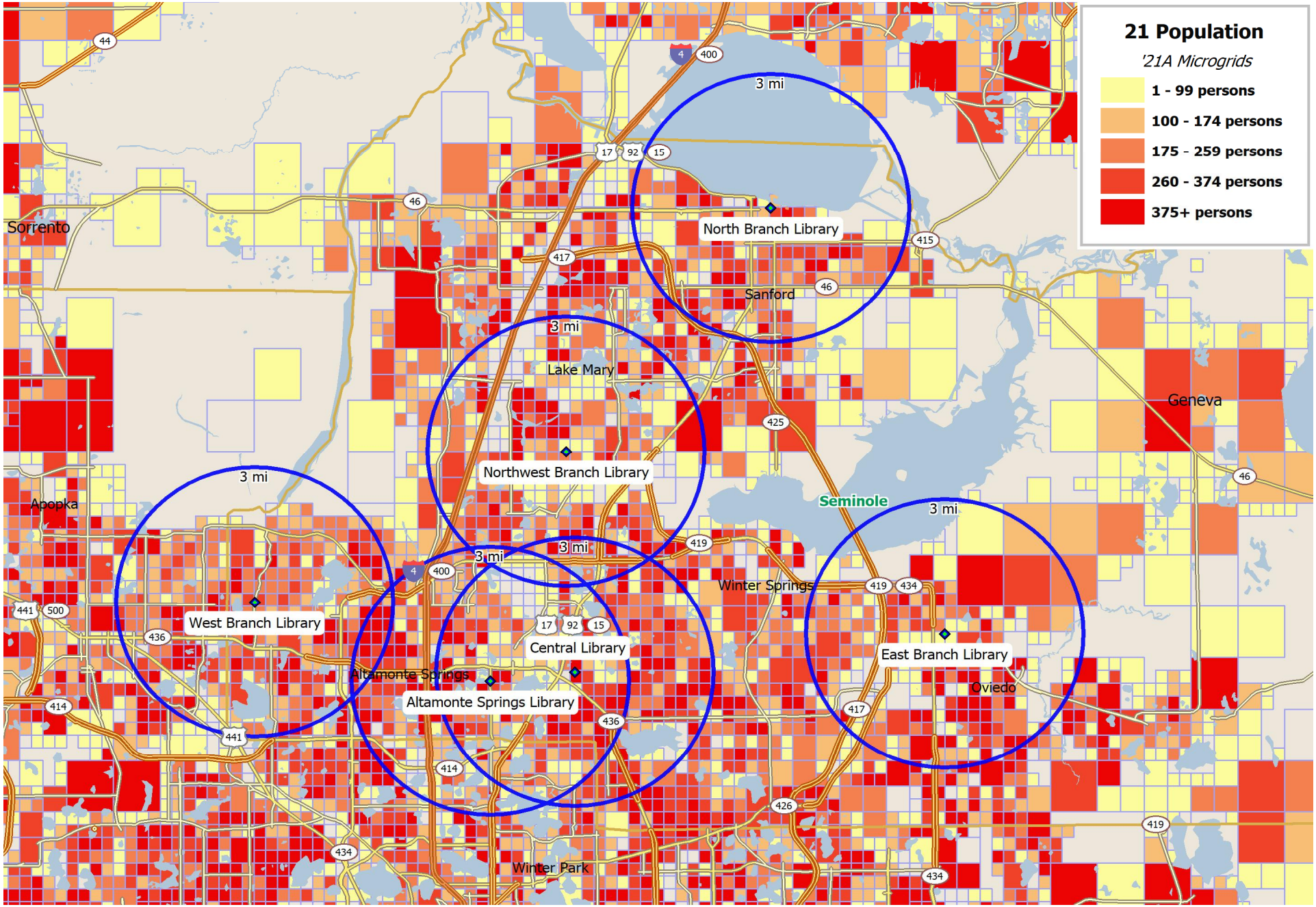
Fact	*Seminole County*	*Florida*	*United States*	*differences between Seminole & State/U.S.*	
Population estimates, July 1, 2019	471,826	21,477,737	328,239,523		
Population estimates base, April 1, 2010	422,710	18,804,564	308,758,105	*Florida*	*U.S.*
Population, % change - April 1, 2010 (estimates base) to July 1, 2019	11.6%	14.2%	6.3%	-2.6%	5.3%
Population, Census, April 1, 2020	470,856	21,538,187	331,449,281		
Population, Census, April 1, 2010	422,718	18,801,310	308,745,538		
Persons under 5 years, %	5.2%	5.3%	6.0%	-0.1%	-0.8%
Persons under 18 years, %	20.8%	19.7%	22.3%	1.1%	-1.5%
Persons 65 years and over, %	16.0%	20.9%	16.5%	-4.9%	-0.5%
Female persons, %	51.6%	51.1%	50.8%	0.5%	0.8%
White alone, %	78.6%	77.3%	76.3%		
Black or African American alone, %	13.1%	16.9%	13.4%	-3.8%	-0.3%
American Indian and Alaska Native alone, %	0.5%	0.5%	1.3%	0.0%	-0.8%
Asian alone, %	5.0%	3.0%	5.9%	2.0%	-0.9%
Native Hawaiian and Other Pacific Islander alone, %	0.1%	0.1%	0.2%	0.0%	-0.1%
Two or More Races, %	2.9%	2.2%	2.8%	0.7%	0.1%
Hispanic or Latino, %	22.5%	26.4%	18.5%	-3.9%	4.0%
White alone, not Hispanic or Latino, %	58.9%	53.2%	60.1%	5.7%	-1.2%
Veterans, 2015-2019	27,558	1,440,338	18,230,322		
Foreign born persons, %, 2015-19	14.1%	20.7%	13.6%	-6.6%	0.5%
Language other than English spoken at home, % of persons age 5 years+, 2015-19	23.4%	29.4%	21.6%	-6.0%	1.8%
Owner-occupied housing unit rate, 2015-19	64.6%	65.4%	64.0%	-0.8%	0.6%
Median value of owner-occupied housing units, 2015-19	$242,600	$215,300	$217,500	$27,300	$25,100
Median selected monthly owner costs -with a mortgage, 2015-19	$1,575	$1,503	$1,595	$72	-$20
Median selected monthly owner costs -without a mortgage, 2015-19	$525	$505	$500	$20	$25
Median gross rent, 2015-19	$1,242	$1,175	$1,062	$67	$180
Households, 2015-19	173,668	7,736,311	120,756,048		
Persons per household, 2015-19	2.63	2.65	2.62	-0.02	0.01
Population per square mile, 2010	1,367.0	350.6	87.4		
Population per square mile, 2020	1,522.7	401.6	93.8	-3.2%	4.0%
Living in same house 1 year ago, % of persons age 1 year+, 2015-19	84.5%	84.5%	85.8%	0.0%	-1.3%

Appendix 4.2
US Census QuickFacts - Comparing Seminole County with Florida & the United States

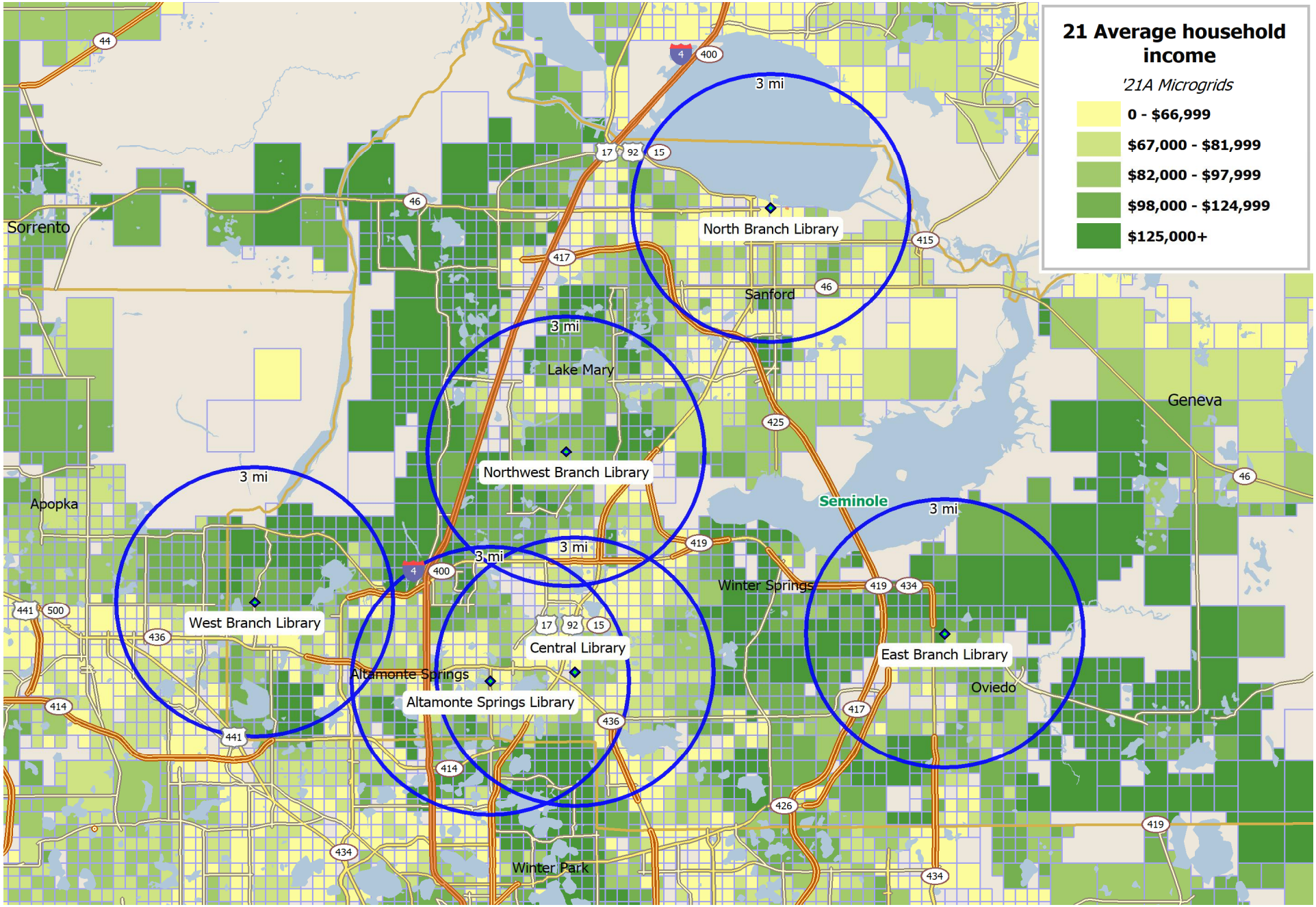
Godfrey's Associates, Inc.
October 1, 2021

Fact	*Seminole County*	*Florida*	*United States*	*differences between Seminole & State/U.S.*	
Households with a computer, %, 2015-19	95.2%	91.5%	90.3%	3.7%	4.9%
Households with a broadband Internet subscription, %, 2015-19	90.1%	83.0%	82.7%	7.1%	7.4%
High school graduate or higher, % of persons age 25 years+, 2015-19	94.3%	88.2%	88.0%	6.1%	6.3%
Bachelor's degree or higher, % of persons age 25 years+, 2015-19	39.6%	29.9%	32.1%	9.7%	7.5%
With a disability, under age 65 years, %, 2015-19	7.1%	8.6%	8.6%		
Persons without health insurance, under age 65 years, %	11.4%	16.3%	10.2%		
Total accommodation and food services sales, 2012 ($1,000)	761,114	49,817,925	708,138,598		
Total health care and social assistance receipts/revenue, 2012 ($1,000)	1,937,937	124,061,425	2,040,441,203		
Total manufacturers shipments, 2012 ($1,000)	1,567,544	96,924,106	5,696,729,632		
Total retail sales, 2012 ($1,000)	6,972,028	273,867,145	4,219,821,871		
Total retail sales per capita, 2012	$16,182	$14,177	$13,443	$2,005	$2,739
In civilian labor force, total, % of population age 16 years+, 2015-19	65.1%	58.5%	63.0%	6.6%	2.1%
In civilian labor force, female, % of population age 16 years+, 2015-19	60.1%	54.3%	58.3%	5.8%	1.8%
Mean travel time to work (minutes), workers age 16 years+, 2015-19	27.5	27.8	26.9	-0.30	0.60
Median household income (in 2018 dollars), 2015-19	$66,768	$55,660	$62,843	$11,108	$3,925
Per capita income in past 12 months (in 2018 dollars), 2015-19	$35,175	$31,619	$34,103	$3,556	$1,072
Persons in poverty, %	9.3%	12.7%	11.4%	-3.4%	-2.1%
All firms, 2012	46,692	2,100,187	27,626,360		
Men-owned firms, 2012	24,154	1,084,885	14,844,597		
Women-owned firms, 2012	17,156	807,817	9,878,397		
Minority-owned firms, 2012	13,200	926,112	7,952,386		
Nonminority-owned firms, 2012	31,826	1,121,749	18,987,918		
Veteran-owned firms, 2012	4,420	185,756	2,521,682		
Nonveteran-owned firms, 2012	40,279	1,846,686	24,070,685		
Total employer establishments, 2019	14,014	574,512	7,959,103		
Total employment, 2019	185,304	8,860,042	132,989,428		
Total annual payroll, 2019 ($1,000)	8,912,954	426,908,310	7,428,553,593		
Total employment, percent change, 2018-2019	1.8%	2.2%	1.6%		
Total nonemployer establishments, 2018	46,371	2,388,050	26,485,532		
Land area in square miles, 2010	309.22	53,624.76	3,531,905.43		

Seminole County, FL: 2021 Population



Seminole County, FL: 2021 Average Household Income



	SEMINOLE, FL (COUNTY 12117)	
Population		
2026 Projection	492,331	
% Change 2021-2026		*4.2%*
2021 Estimate	472,526	
% Change 2010-2021		*11.8%*
2010 Census	422,718	
% Change 2000-2010		*15.7%*
2000 Census	365,206	
Households		
2026 Projection	195,655	
% Change 2021-2026		*5.1%*
2021 Estimate	186,180	
% Change 2010-2021		*13.0%*
2010 Census	164,706	
% Change 2000-2010		*18.0%*
2000 Census	139,576	
Age, total population	**472,526**	
under 5 years	24,018	*5.1%*
5 to 9 years	26,476	*5.6%*
10 to 14 years	28,463	*6.0%*
15 to 19 years	27,302	*5.8%*
20 to 24 years	28,354	*6.0%*
25 to 34 years	68,095	*14.4%*
35 to 44 years	66,349	*14.0%*
45 to 54 years	62,635	*13.3%*
55 to 64 years	61,661	*13.0%*
65 to 74 years	46,404	*9.8%*
75 to 84 years	22,999	*4.9%*
85 years and over	9,770	*2.1%*
Median Age	39.90	
Age, male population	**228,671**	
under 20 years	54,422	*23.8%*
20 to 34 years	48,375	*21.2%*
35 to 44 years	32,016	*14.0%*
45 to 64 years	59,242	*25.9%*
65 to 84 years	31,221	*13.7%*
85 years and over	3,395	*1.5%*
Median Age	38.50	
Age, female population	**243,855**	
under 20 years	51,837	*21.3%*
20 to 34 years	48,074	*19.7%*
35 to 44 years	34,333	*14.1%*
45 to 64 years	65,054	*26.7%*
65 to 84 years	38,182	*15.7%*
85 years and over	6,375	*2.6%*
Median Age	41.30	

	SEMINOLE, FL (COUNTY 12117)	
Total Aggregate Income ($mil)	$17,704.6	
Per Capita Income	$37,468	
Household Income (households)	**186,180**	
under $10,000	9,086	*4.9%*
$10,000 - $14,999	4,529	*2.4%*
$15,000 - $19,999	4,541	*2.4%*
$20,000 - $24,999	6,663	*3.6%*
$25,000 - $29,999	7,322	*3.9%*
$30,000 - $34,999	7,332	*3.9%*
$35,000 - $39,999	7,275	*3.9%*
$40,000 - $49,999	14,397	*7.7%*
$50,000 - $59,999	15,805	*8.5%*
$60,000 - $74,999	20,450	*11.0%*
$75,000 - $99,999	28,243	*15.2%*
$100,000 - $124,999	17,248	*9.3%*
$125,000 - $149,999	12,489	*6.7%*
$150,000 - $199,999	13,691	*7.4%*
$200,000 - $249,999	7,170	*3.9%*
$250,000 and over	9,939	*5.3%*
Aggregate Household Income ($mil)	$17,674.4	
Average Household Income	$94,932	
Median Household Income	$71,654	
Family Income (families)	**123,097**	
under $10,000	3,231	*2.6%*
$10,000 - $14,999	1,715	*1.4%*
$15,000 - $19,999	1,515	*1.2%*
$20,000 - $24,999	2,834	*2.3%*
$25,000 - $29,999	3,608	*2.9%*
$30,000 - $34,999	3,800	*3.1%*
$35,000 - $39,999	3,733	*3.0%*
$40,000 - $49,999	7,720	*6.3%*
$50,000 - $59,999	8,767	*7.1%*
$60,000 - $74,999	13,371	*10.9%*
$75,000 - $99,999	20,855	*16.9%*
$100,000 - $124,999	13,801	*11.2%*
$125,000 - $149,999	10,482	*8.5%*
$150,000 - $199,999	12,307	*10.0%*
$200,000 - $249,999	6,513	*5.3%*
$250,000 and over	8,845	*7.2%*
Aggregate family income ($mil)	$14,189.5	
Average family income	$115,271	
Median family income	$88,428	
Non-Family Income (non-families)	**63,083**	
Aggregate non-family income ($mil)	$3,484.9	
Average non-family income	$55,243	
Median non-family income	$47,668	

	SEMINOLE, FL (COUNTY 12117)	
Population by Race/Ethnicity	**472,526**	
White	347,391	*73.5%*
Black	62,078	*13.1%*
Asian	23,988	*5.1%*
Hawaiian/Pacific Islander	326	*0.1%*
American Indian/AK Native	1,753	*0.4%*
Other/multiple races	36,990	*7.8%*
Hispanic Origin	103,748	*22.0%*
Education (persons 25+)	**337,913**	
No high school dipoloma	19,320	*5.7%*
High school diploma	71,316	*21.1%*
College, no diploma	63,614	*18.8%*
Associate degree	46,092	*13.6%*
Bachelor's degree	91,112	*27.0%*
Graduate/professional degree	46,459	*13.7%*
Labor Force (persons 16+ yrs)		
Total Population, Age 16+	**388,031**	
Employed	216,407	*55.8%*
Unemployed	10,691	*2.8%*
In armed forces	1,110	*0.3%*
Not in labor force	159,823	*41.2%*
Male Population, Age 16+	**185,447**	
Employed	113,429	*61.2%*
Unemployed	5,678	*3.1%*
In armed forces	972	*0.5%*
Not in labor force	65,368	*35.2%*
Female Population, Age 16+	**202,584**	
Employed	102,978	*50.8%*
Unemployed	5,013	*2.5%*
In armed forces	138	*0.1%*
Not in labor force	94,455	*46.6%*
Vehicles Available (households)	**186,180**	
Households with no vehicles	6,703	*3.6%*
Households with 1 vehicle	62,679	*33.7%*
Households with 2 vehicles	77,710	*41.7%*
Households with 3+ vehicles	39,088	*21.0%*
Vehicles in owner households	249,080	*71.5%*
Vehicles in renter households	99,484	*28.5%*
Total vehicles available	348,564	
Average vehicles per household	1.87	

	SEMINOLE, FL (COUNTY 12117)	
Households	186,180	
Average household size	2.52	
Families	123,097	
Average family size	3.13	
Non-Families	63,083	
Average non-family size	1.33	
Group Quarters	3,513	
Household Type		
Families	123,097	
Married couples	88,657	*72.0%*
with children	37,003	*41.7%*
Male householder, no wife	9,187	*7.5%*
with children	4,985	*54.3%*
Female householder, no husband	25,206	*20.5%*
with children	15,409	*61.1%*
Non-Families	63,083	
with children	678	*1.1%*
Age of Householder (households)		
under 25 years	7,112	*3.8%*
25 to 34 years	29,759	*16.0%*
35 to 44 years	33,592	*18.0%*
45 to 54 years	33,704	*18.1%*
55 to 64 years	34,824	*18.7%*
65 to 74 years	27,498	*14.8%*
75 to 84 years	14,125	*7.6%*
85 years and over	5,566	*3.0%*
Household Size (households)		
1 person	47,218	*25.4%*
2 person	62,960	*33.8%*
3 to 4 persons	59,718	*32.1%*
5+ persons	16,284	*8.7%*
Total Housing Units	**196,837**	
Occupied	186,180	*94.6%*
Owner-occupied	121,589	*65.3%*
Renter-occupied	64,591	*34.7%*
Vacant	10,657	*5.4%*
Housing Value		
Average Home Value	$315,857	
Median Home Value	$263,932	
Average Contract Rent	$1,195	
Median Contract Rent	$1,082	

income expressed in 2020 dollars

	total 2025	*% of population age*		*median*	*total*	*average*	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	***population***	*under 20*	*over 65*	*age*	*households*	*HH size*	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Sanford	**67,224**	27.3%	13.4%	34.8	24,725	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
Altamonte Springs	**48,366**	20.2%	17.9%	39.3	22,037	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
Oviedo	**43,095**	23.7%	14.6%	37.8	14,365	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Winter Springs	**41,324**	20.6%	20.8%	43.3	16,116	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Casselberry	**31,866**	19.5%	19.4%	39.3	13,623	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
Lake Mary	**18,437**	20.4%	23.0%	45.7	7,191	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Longwood	**16,253**	20.7%	23.5%	43.6	6,227	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
averages:	**35,568**	22.1%	15.9%	40.0	13,933	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

	total 2025	***% of population age***		*median*	*total*	*average*	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	***under 20***	*over 65*	*age*	*households*	*HH size*	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Sanford	67,224	**27.3%**	13.4%	34.8	24,725	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
Oviedo	43,095	**23.7%**	14.6%	37.8	14,365	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Longwood	16,253	**20.7%**	23.5%	43.6	6,227	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
Winter Springs	41,324	**20.6%**	20.8%	43.3	16,116	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Lake Mary	18,437	**20.4%**	23.0%	45.7	7,191	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Altamonte Springs	48,366	**20.2%**	17.9%	39.3	22,037	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
Casselberry	31,866	**19.5%**	19.4%	39.3	13,623	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
averages:	35,568	**22.1%**	15.9%	40.0	13,933	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

	total 2025	***% of population age***		*median*	*total*	*average*	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	*under 20*	***over 65***	*age*	*households*	*HH size*	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Longwood	16,253	20.7%	**23.5%**	43.6	6,227	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
Lake Mary	18,437	20.4%	**23.0%**	45.7	7,191	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Winter Springs	41,324	20.6%	**20.8%**	43.3	16,116	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Casselberry	31,866	19.5%	**19.4%**	39.3	13,623	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
Altamonte Springs	48,366	20.2%	**17.9%**	39.3	22,037	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
Oviedo	43,095	23.7%	**14.6%**	37.8	14,365	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Sanford	67,224	27.3%	**13.4%**	34.8	24,725	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
averages:	35,568	22.1%	**15.9%**	40.0	13,933	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

income expressed in 2020 dollars

	total 2025	*% of population age*		***median***	*total*	*average*	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	***age***	*households*	*HH size*	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Lake Mary	18,437	20.4%	23.0%	**45.7**	7,191	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Longwood	16,253	20.7%	23.5%	**43.6**	6,227	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
Winter Springs	41,324	20.6%	20.8%	**43.3**	16,116	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Altamonte Springs	48,366	20.2%	17.9%	**39.3**	22,037	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
Casselberry	31,866	19.5%	19.4%	**39.3**	13,623	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
Oviedo	43,095	23.7%	14.6%	**37.8**	14,365	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Sanford	67,224	27.3%	13.4%	**34.8**	24,725	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
averages:	35,568	22.1%	15.9%	**40.0**	13,933	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

	total 2025	*% of population age*		*median*	***total***	*average*	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	*age*	***households***	*HH size*	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Sanford	67,224	27.3%	13.4%	34.8	**24,725**	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
Altamonte Springs	48,366	20.2%	17.9%	39.3	**22,037**	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
Winter Springs	41,324	20.6%	20.8%	43.3	**16,116**	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Oviedo	43,095	23.7%	14.6%	37.8	**14,365**	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Casselberry	31,866	19.5%	19.4%	39.3	**13,623**	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
Lake Mary	18,437	20.4%	23.0%	45.7	**7,191**	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Longwood	16,253	20.7%	23.5%	43.6	**6,227**	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
averages:	35,568	22.1%	15.9%	40.0	**13,933**	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

	total 2025	*% of population age*		*median*	*total*	***average***	*median*	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	*age*	*households*	***HH size***	*HH income*	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Oviedo	43,095	23.7%	14.6%	37.8	14,365	**2.98**	$107,449	17.2%	16.0%	$45,877	73.3%	26.7%
Sanford	67,224	27.3%	13.4%	34.8	24,725	**2.67**	$52,963	46.5%	1.4%	$25,113	47.9%	52.0%
Longwood	16,253	20.7%	23.5%	43.6	6,227	**2.59**	$74,117	20.7%	3.3%	$33,007	64.9%	35.1%
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	**2.56**	$86,257	25.4%	13.4%	$46,111	73.7%	26.3%
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	**2.5**	$103,758	17.4%	16.1%	$54,726	67.7%	32.3%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	**2.33**	$54,589	43.3%	3.3%	$30,888	48.5%	51.5%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	**2.18**	$60,147	36.9%	4.8%	$36,589	38.4%	61.6%
averages:	35,568	22.1%	15.9%	40.0	13,933	**2.54**	$72,201	29.7%	9.0%	$35,353	59.8%	40.2%

income expressed in 2020 dollars

	total 2025	*% of population age*		*median*	*total*	*average*	***median***	*% of HH income*		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	*age*	*households*	*HH size*	***HH income***	*< $50K*	*> $200K*	*income*	*% owner*	*% renter*
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	**$107,449**	17.2%	16.0%	$45,877	73.3%	26.7%
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	**$103,758**	17.4%	16.1%	$54,726	67.7%	32.3%
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	**$86,257**	25.4%	13.4%	$46,111	73.7%	26.3%
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	**$74,117**	20.7%	3.3%	$33,007	64.9%	35.1%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	**$60,147**	36.9%	4.8%	$36,589	38.4%	61.6%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	**$54,589**	43.3%	3.3%	$30,888	48.5%	51.5%
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	**$52,963**	46.5%	1.4%	$25,113	47.9%	52.0%
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	**$72,201**	29.7%	9.0%	$35,353	59.8%	40.2%

	total 2025	*% of population age*		*median*	*total*	*average*	*median*	***% of HH income***		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	*age*	*households*	*HH size*	*HH income*	***< $50K***	*> $200K*	*income*	*% owner*	*% renter*
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	$52,963	**46.5%**	1.4%	$25,113	47.9%	52.0%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	$54,589	**43.3%**	3.3%	$30,888	48.5%	51.5%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	$60,147	**36.9%**	4.8%	$36,589	38.4%	61.6%
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	$86,257	**25.4%**	13.4%	$46,111	73.7%	26.3%
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	$74,117	**20.7%**	3.3%	$33,007	64.9%	35.1%
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	$103,758	**17.4%**	16.1%	$54,726	67.7%	32.3%
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	$107,449	**17.2%**	16.0%	$45,877	73.3%	26.7%
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	$72,201	**29.7%**	9.0%	$35,353	59.8%	40.2%

	total 2025	*% of population age*		*median*	*total*	*average*	*median*	***% of HH income***		*per capita*	*occupied housing units*	
city	*population*	*under 20*	*over 65*	*age*	*households*	*HH size*	*HH income*	*< $50K*	***> $200K***	*income*	*% owner*	*% renter*
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	$103,758	17.4%	**16.1%**	$54,726	67.7%	32.3%
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	$107,449	17.2%	**16.0%**	$45,877	73.3%	26.7%
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	$86,257	25.4%	**13.4%**	$46,111	73.7%	26.3%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	$60,147	36.9%	**4.8%**	$36,589	38.4%	61.6%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	$54,589	43.3%	**3.3%**	$30,888	48.5%	51.5%
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	$74,117	20.7%	**3.3%**	$33,007	64.9%	35.1%
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	$52,963	46.5%	**1.4%**	$25,113	47.9%	52.0%
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	$72,201	29.7%	**9.0%**	$35,353	59.8%	40.2%

income expressed in 2020 dollars

city	total 2025 population	% of population age under 20	% of population age over 65	median age	total households	average HH size	median HH income	% of HH income < $50K	% of HH income > $200K	***per capita income***	occupied housing units % owner	occupied housing units % renter
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	$103,758	17.4%	16.1%	**$54,726**	67.7%	32.3%
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	$86,257	25.4%	13.4%	**$46,111**	73.7%	26.3%
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	$107,449	17.2%	16.0%	**$45,877**	73.3%	26.7%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	$60,147	36.9%	4.8%	**$36,589**	38.4%	61.6%
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	$74,117	20.7%	3.3%	**$33,007**	64.9%	35.1%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	$54,589	43.3%	3.3%	**$30,888**	48.5%	51.5%
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	$52,963	46.5%	1.4%	**$25,113**	47.9%	52.0%
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	$72,201	29.7%	9.0%	**$35,353**	59.8%	40.2%

city	total 2025 population	% of population age under 20	% of population age over 65	median age	total households	average HH size	median HH income	% of HH income < $50K	% of HH income > $200K	per capita income	***occupied housing units % owner***	occupied housing units % renter
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	$86,257	25.4%	13.4%	$46,111	**73.7%**	26.3%
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	$107,449	17.2%	16.0%	$45,877	**73.3%**	26.7%
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	$103,758	17.4%	16.1%	$54,726	**67.7%**	32.3%
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	$74,117	20.7%	3.3%	$33,007	**64.9%**	35.1%
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	$54,589	43.3%	3.3%	$30,888	**48.5%**	51.5%
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	$52,963	46.5%	1.4%	$25,113	**47.9%**	52.0%
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	$60,147	36.9%	4.8%	$36,589	**38.4%**	61.6%
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	$72,201	29.7%	9.0%	$35,353	**59.8%**	40.2%

city	total 2025 population	% of population age under 20	% of population age over 65	median age	total households	average HH size	median HH income	% of HH income < $50K	% of HH income > $200K	per capita income	occupied housing units % owner	***occupied housing units % renter***
Altamonte Springs	48,366	20.2%	17.9%	39.3	22,037	2.18	$60,147	36.9%	4.8%	$36,589	38.4%	**61.6%**
Sanford	67,224	27.3%	13.4%	34.8	24,725	2.67	$52,963	46.5%	1.4%	$25,113	47.9%	**52.0%**
Casselberry	31,866	19.5%	19.4%	39.3	13,623	2.33	$54,589	43.3%	3.3%	$30,888	48.5%	**51.5%**
Longwood	16,253	20.7%	23.5%	43.6	6,227	2.59	$74,117	20.7%	3.3%	$33,007	64.9%	**35.1%**
Lake Mary	18,437	20.4%	23.0%	45.7	7,191	2.5	$103,758	17.4%	16.1%	$54,726	67.7%	**32.3%**
Oviedo	43,095	23.7%	14.6%	37.8	14,365	2.98	$107,449	17.2%	16.0%	$45,877	73.3%	**26.7%**
Winter Springs	41,324	20.6%	20.8%	43.3	16,116	2.56	$86,257	25.4%	13.4%	$46,111	73.7%	**26.3%**
averages:	35,568	22.1%	15.9%	40.0	13,933	2.54	$72,201	29.7%	9.0%	$35,353	59.8%	**40.2%**

Population Projections by Age, Sex, Race, and Hispanic Origin For Florida and Its Counties, 2025–2045, With Estimates for 2020

County and State	Age/ Sex	Census 2010	Estimates 2020	Projections 2025	2030	2035	2040	2045
SEMINOLE								
All Races	Total	422,718	476,727	505,142	528,478	548,354	565,100	579,426
	0-4	23,363	27,404	29,277	30,382	30,666	30,665	31,257
	5-17	73,818	75,889	80,744	85,288	88,692	90,878	91,442
	18-24	42,667	43,725	43,036	44,385	47,243	48,836	50,764
	25-54	180,977	192,419	202,148	211,272	219,476	225,631	227,440
	55-64	51,216	62,229	60,557	54,886	52,581	55,975	63,549
	65-79	36,900	56,464	66,270	72,386	73,448	69,939	65,758
	80+	13,777	18,597	23,110	29,879	36,248	43,176	49,216
	Female	217,919	246,487	261,616	274,163	284,900	293,957	301,719
	0-4	11,523	13,428	14,346	14,887	15,026	15,026	15,316
	5-17	36,191	37,647	39,991	42,192	43,875	44,964	45,248
	18-24	20,732	21,360	21,351	22,023	23,352	24,136	25,096
	25-54	93,291	98,646	103,293	107,903	112,274	115,456	116,670
	55-64	27,118	32,998	32,140	29,341	28,021	29,630	33,327
	65-79	20,308	30,893	36,470	39,904	40,444	38,608	36,264
	80+	8,756	11,515	14,025	17,913	21,908	26,137	29,798
Non-Hispanic White	Total	285,367	286,971	288,718	290,128	291,318	292,308	293,150
	0-4	13,093	14,110	14,067	13,768	13,170	12,416	12,251
	5-17	44,890	38,203	38,573	39,727	40,054	39,479	38,144
	18-24	26,929	23,785	21,252	20,121	21,373	22,256	22,507
	25-54	121,362	111,382	109,947	110,266	110,525	110,263	108,382
	55-64	39,356	43,298	39,617	33,423	29,895	31,259	36,077
	65-79	28,469	41,880	47,671	50,007	48,909	44,333	39,556
	80+	11,268	14,313	17,591	22,816	27,392	32,302	36,233
	Female	146,037	147,613	149,012	150,279	151,385	152,308	153,112
	0-4	6,481	6,914	6,893	6,746	6,453	6,084	6,003
	5-17	21,812	18,868	19,053	19,577	19,738	19,455	18,797
	18-24	13,000	11,357	10,355	9,894	10,433	10,864	10,986
	25-54	61,532	56,419	55,470	55,518	55,788	55,636	54,775
	55-64	20,563	22,579	20,730	17,729	15,898	16,541	18,945
	65-79	15,498	22,674	25,932	27,257	26,666	24,356	21,836
	80+	7,151	8,802	10,579	13,558	16,409	19,372	21,770
Non-Hispanic Black	Total	46,383	59,666	66,488	72,102	76,887	80,915	84,365
	0-4	3,447	4,365	4,803	5,040	5,267	5,460	5,699
	5-17	9,777	11,568	12,778	13,817	14,673	15,305	15,738
	18-24	5,389	5,914	6,283	6,660	7,282	7,687	8,061
	25-54	19,558	25,168	27,889	30,227	31,808	33,079	34,097
	55-64	4,313	6,227	6,740	7,010	7,429	8,159	8,803
	65-79	2,953	4,966	6,231	7,139	7,621	7,825	8,081
	80+	946	1,458	1,764	2,209	2,807	3,400	3,886
	Female	24,316	31,233	34,775	37,697	40,192	42,300	44,109
	0-4	1,697	2,141	2,353	2,466	2,577	2,671	2,788
	5-17	4,809	5,729	6,318	6,854	7,278	7,592	7,807
	18-24	2,654	3,008	3,221	3,359	3,670	3,873	4,063
	25-54	10,454	13,228	14,634	15,877	16,703	17,344	17,983
	55-64	2,417	3,424	3,666	3,798	4,003	4,380	4,609
	65-79	1,652	2,747	3,486	3,973	4,209	4,316	4,427
	80+	633	956	1,097	1,370	1,752	2,124	2,432
Hispanic	Total	72,457	106,256	123,389	137,479	149,475	159,593	168,250
	0-4	5,661	7,326	8,569	9,563	10,129	10,612	11,034
	5-17	15,645	21,758	24,436	26,231	28,112	29,989	31,282
	18-24	8,646	11,895	13,120	14,948	15,683	15,827	16,981
	25-54	31,187	45,163	52,803	58,721	64,453	69,090	71,356
	55-64	5,704	10,128	11,460	11,655	12,294	13,300	15,158
	65-79	4,285	7,621	9,876	12,390	13,876	14,659	14,895
	80+	1,329	2,365	3,125	3,971	4,928	6,116	7,544
	Female	37,764	55,089	63,870	71,070	77,207	82,385	86,809
	0-4	2,780	3,590	4,199	4,686	4,963	5,200	5,407
	5-17	7,747	10,825	12,125	13,012	13,940	14,872	15,514
	18-24	4,265	5,922	6,558	7,423	7,778	7,846	8,418
	25-54	16,478	23,297	27,095	30,141	33,087	35,520	36,699
	55-64	3,152	5,606	6,265	6,291	6,515	6,952	7,925
	65-79	2,512	4,381	5,663	7,081	7,880	8,206	8,225
	80+	830	1,468	1,965	2,436	3,044	3,789	4,621

County and State	Age/Sex	Census 2010	Estimates 2020	Projections 2025	2030	2035	2040	2045
SEMINOLE	Total	422,718	476,727	505,142	528,478	548,354	565,100	579,426
	0-4	23,363	27,404	29,277	30,382	30,666	30,665	31,257
	5-9	25,722	28,766	30,368	32,058	33,098	33,273	33,161
	10-14	28,998	28,678	31,521	32,801	34,484	35,489	35,582
	15-19	30,877	29,818	30,485	33,028	34,134	35,759	36,703
	15-17	19,098	18,445	18,855	20,429	21,110	22,116	22,699
	18-19	11,779	11,373	11,630	12,599	13,024	13,643	14,004
	20-24	30,888	32,352	31,406	31,786	34,219	35,193	36,760
	25-29	28,331	35,084	34,882	33,525	33,799	36,222	37,138
	30-34	26,477	35,748	37,706	37,105	35,549	35,749	38,181
	35-39	27,657	32,410	37,932	39,644	38,853	37,135	37,263
	40-44	31,202	29,387	33,651	38,922	40,514	39,565	37,699
	45-49	34,747	28,980	29,517	33,398	38,445	39,870	38,806
	50-54	32,563	30,810	28,460	28,678	32,316	37,090	38,353
	55-59	27,577	32,749	29,586	27,095	27,190	30,564	35,026
	60-64	23,639	29,480	30,971	27,791	25,391	25,411	28,523
	65-69	16,390	23,950	27,226	28,512	25,602	23,416	23,438
	70-74	11,243	19,323	21,425	24,274	25,468	22,892	20,958
	75-79	9,267	13,191	17,619	19,600	22,378	23,631	21,362
	80-84	6,879	8,334	11,184	15,008	16,843	19,392	20,622
	85+	6,898	10,263	11,926	14,871	19,405	23,784	28,594
	Female	217,919	246,487	261,616	274,163	284,900	293,957	301,719
	0-4	11,523	13,428	14,346	14,887	15,026	15,026	15,316
	5-9	12,740	14,216	15,009	15,847	16,363	16,452	16,398
	10-14	14,076	14,235	15,554	16,187	17,018	17,514	17,559
	15-19	15,081	14,785	15,155	16,328	16,873	17,679	18,150
	15-17	9,375	9,196	9,428	10,158	10,494	10,998	11,291
	18-19	5,706	5,589	5,727	6,170	6,379	6,681	6,859
	20-24	15,026	15,771	15,624	15,853	16,973	17,455	18,237
	25-29	14,202	17,382	17,241	16,905	17,083	18,211	18,667
	30-34	13,480	17,912	18,980	18,645	18,205	18,342	19,485
	35-39	14,420	16,712	19,244	20,190	19,762	19,236	19,330
	40-44	16,191	15,224	17,427	19,826	20,705	20,184	19,581
	45-49	17,962	15,257	15,351	17,361	19,650	20,447	19,851
	50-54	17,036	16,159	15,050	14,976	16,869	19,036	19,756
	55-59	14,706	17,213	15,673	14,464	14,334	16,107	18,151
	60-64	12,412	15,785	16,467	14,877	13,687	13,523	15,176
	65-69	8,716	13,118	14,785	15,361	13,877	12,767	12,615
	70-74	6,215	10,487	11,943	13,418	13,968	12,631	11,631
	75-79	5,377	7,288	9,742	11,125	12,599	13,210	12,018
	80-84	4,116	4,855	6,401	8,587	9,880	11,283	11,915
	85+	4,640	6,660	7,624	9,326	12,028	14,854	17,883
	Male	204,799	230,240	243,526	254,315	263,454	271,143	277,707
	0-4	11,840	13,976	14,931	15,495	15,640	15,639	15,941
	5-9	12,982	14,550	15,359	16,211	16,735	16,821	16,763
	10-14	14,922	14,443	15,967	16,614	17,466	17,975	18,023
	15-19	15,796	15,033	15,330	16,700	17,261	18,080	18,553
	15-17	9,723	9,249	9,427	10,271	10,616	11,118	11,408
	18-19	6,073	5,784	5,903	6,429	6,645	6,962	7,145
	20-24	15,862	16,581	15,782	15,933	17,246	17,738	18,523
	25-29	14,129	17,702	17,641	16,620	16,716	18,011	18,471
	30-34	12,997	17,836	18,726	18,460	17,344	17,407	18,696
	35-39	13,237	15,698	18,688	19,454	19,091	17,899	17,933
	40-44	15,011	14,163	16,224	19,096	19,809	19,381	18,118
	45-49	16,785	13,723	14,166	16,037	18,795	19,423	18,955
	50-54	15,527	14,651	13,410	13,702	15,447	18,054	18,597
	55-59	12,871	15,536	13,913	12,631	12,856	14,457	16,875
	60-64	11,227	13,695	14,504	12,914	11,704	11,888	13,347
	65-69	7,674	10,832	12,441	13,151	11,725	10,649	10,823
	70-74	5,028	8,836	9,482	10,856	11,500	10,261	9,327
	75-79	3,890	5,903	7,877	8,475	9,779	10,421	9,344
	80-84	2,763	3,479	4,783	6,421	6,963	8,109	8,707
	85+	2,258	3,603	4,302	5,545	7,377	8,930	10,711

Section 4:

Demographics & Population

The prescribed scope of work for this Library Services Master Plan required that the Consultants develop a thorough understanding of the greater Seminole County community – in addition to an understanding of the Seminole County Public Library (SCPL or the Library). The contents of this Section document the process and findings of that effort.

For almost any public library, the demand for library services is directly proportional to the number of people living and/or working within a given library's service area. For government-supported libraries, the service area is usually the area of jurisdiction of that governmental entity. As with the peer library analyses of Section 3, service area population figures are key to determining the workload, and therefore the performance level of a public library.

Reciprocal borrowing agreements between libraries often result in residents and workers using multiple libraries in their region – creating a crossover demand for library service beyond county limits or county borders. But usually, this type of crossover goes in multiple directions, hence the demand evens out over time.

Demographics. Beyond the aggregate number of people inhabiting a County, the characteristics of those individuals can also influence their needs for library service. This Section goes into detail about quantifying the composition and traits of the residents of Seminole County. Section 5 attempts to qualify community needs by seeking input from library stakeholders and County employees.

This Section identifies and documents ***quantified*** community conditions that indicate current and/or potential needs – community needs which SCPL may be well-positioned to fill.

Population & Demographics

To determine the order of magnitude for future levels of library service needed in Seminole County, future population projections need to be codified. The Consultants prefer to use locally sourced data for our clients, rather than develop our own forecasts. Florida has such a resource.

Florida's Bureau of Economic & Business Research (BEBR). The BEBR was founded In 1930 and is part of the University of Florida College of Liberal Arts and Sciences. BEBR annually produces Florida's *Official State and Local Population Estimates and Projections* – used for distributing state revenue-sharing dollars to cities and counties in Florida and for budgeting, planning, and policy analysis by government agencies, businesses, researchers, media, and the general public. The basic guidelines for producing population estimates were established by the 1972 Florida Legislature – the same guidelines used by the U.S. Census Bureau. Funding for these estimates is provided by the Legislature.

Seminole County Website. According to Seminole County government (the County), as of 2020, the residential population of Seminole County was approximately 471,000 people. The County's webpage stated: [1]

- Total Population: 470,856 *(U.S. 2020 Decennial Census).*
- Total Households: 181,142 *(U.S. Census July 1, 2019).*
- Population Density (population per square mile): 1,543, 4th most densely populated county in Florida *(BEBR Estimate, October 2020).*
- Median Age: 39.5, *Florida median 42.4 (U.S. Census 2019 ACS Estimate).*
- Average Household Size: 3.09.
- Per Capita Personal Income: $37,370 *(U.S. Census).*
- Median Household Income: $70,190, *Florida median $59,227 (U.S. Census).*
- Number of Employed Residents: 238,112 *(Florida Department of Economic Opportunity, August 2021).*
- Number of Businesses: 14,014.
- Population with a Bachelor Degree or higher: 41.2%, *Florida percentage 30.7% (U.S. Census).*

[1] seminolecountyfl.gov Accessed on October 29, 2021.

Seminole County Population Trends

National trends in population affect most states and counties in some way – but will likely impact Seminole County and Florida more acutely than most places. Specific trends that appear to apply to this Library Master Plan include:

- Continued migration from higher taxing states to lower taxing ones, with Florida being such a prime relocation destination for decades now.
- A more recent migration trend from rural to urban and suburban job centers, a trend dampened somewhat by increased work-from-home opportunities accelerated by the COVID-19 pandemic.
- A local expansion of home building to the east in Seminole County – the places with available buildable land for housing developments.

Population Densities. For years, Seminole County has been considered a bedroom community of Orlando, however, population densities county-wide and in its municipalities confirm numbers that exceed suburban norms, equaling urban densities of over 4,600 people per square mile in Altamonte Springs.[2]

This Library Master Plan, as well as other County planning measurements, will relate to future population projections over the coming 20 years, as shown in Table 4.1. Accuracy of such forecasts are important, as the decisions based on them can cost millions of dollars over time, if not billions. This 20-year planning horizon is a minimum standard mandated by the Florida Public Library Outcomes & Standards 2015[3] and is considered public library best practice.

The resulting projected Seminole County population for 2040 is 565,100 persons, equating to an increase of 18.5% over the year 2020 estimate of 476,727. This 20-year future projection compares with the historic increase of 30.5% over the 20 years from 2000 to 2020. See Appendix 4.1 for detailed BEBR population projections for years 2020 to 2045.

Consultant Observations: BEBR's projected increase of 18.5% in Seminole County's population by 2040 is based on full-time residents only – no seasonal population factor is included. The Consultants speculate that, compared to the past 20 years, the slowing future growth trend is indicative of the amount of buildable land, as Seminole County is one of the smallest counties in Florida in terms of land mass.

Table 4.1
Seminole County Population, Past and Projected, 2000 to 2045

year(s)	*population*	*change*	*% change*
2000	365,196		
2010	422,718	57,522	15.8%
2019	471,826	49,108	11.6%
2020	476,727	4,901	1.0%
2025	505,142	28,415	6.0%
2030	528,478	23,336	4.6%
2035	548,354	19,876	3.8%
2040	565,100	16,746	3.1%
2045	579,426	14,326	2.6%
2000 to 2020		111,531	30.5%
2020 to 2040		88,373	18.5%

Sources: U.S. Census *2000, 2010, 2019.* BEBR projections 2020 to 2045.

[2] U.S. Census QuickFacts, accessed April 27, 2022.

[3] *Florida Public Library Outcomes & Standards 2015*, Part Two: Standards For Customer Focused Public Library Facilities, pages 26-32.

Seminole County Demographic Trends

Before delving into specific characteristics of your Public Library and its users, the Consultants sought to become acquainted with the greater Seminole County community. To this end, the Consultants analyzed 2020 U.S. Census data for the County population in several categories, including but not limited to:

- Total population, percentages by age cohort, and by ethnicity.
- Housing and home ownership.
- Education attainment and technology penetration.
- Local economic factors such as employment, income, and poverty.

The Consultants used 2020 U.S. Census QuickFacts figures to perform a simple review of recent data County-wide and from the largest municipalities – in contrast to parallel metrics for Florida and the United States.

In general, Seminole County more closely aligns with the United States than it does with Florida. Of the per 30 unit metrics presented in Table 4.2, Seminole is closer to the U.S. numbers in 20 of those – exactly two-thirds. This would appear to indicate that people are moving to Seminole from outside of Florida, rather than from in State. We do know that Seminole County has had net migration as high as 5,923 persons in Fiscal Year FY2017-2018 – the same year that births outnumbered deaths in the County by 1,154.[4]

Age Cohorts. There is no substantive difference between Seminole County and U.S. populations concerning age, with deviations ranging between 0.5% and 1.5%. The Florida population is older than the County, with the State cohort for age 65+ at almost five percent higher than the County. Otherwise, Florida and County populations deviate 1.1% or less in their respective cohorts.

Housing. Owner-occupied housing in Seminole County is 0.6% higher than the nation – and only 0.8% lower than Florida's rate. Median home values in Seminole are $25,100 to $27,300 more than U.S. and Florida, respectively. The dollar amount for monthly mortgages and rent in Seminole County closely align with national and Florida averages. Population density, measured by number of persons per square mile, is significantly higher in Seminole County – almost four times as dense as the State, and over 16 times the national density.

Table 4.2
Seminole County Demographics Comparisons, 2020

fact	*Seminole County*	*Florida*	*United States*
Population estimates, July 1, 2019	471,826	21,477,737	328,239,523
Population, Census, April 1, 2020	470,856	21,538,187	331,449,281
Population % change - April 1, 2010 (estimates base) to July 1, 2019	11.6%	14.2%	6.3%
Persons under 5 years %	5.2%	5.3%	6.0%
Persons under 18 years %	20.8%	19.7%	22.3%
Persons 65 years and over %	16.0%	20.9%	16.5%
Female persons %	51.6%	51.1%	50.8%
White alone %	78.6%	77.3%	76.3%
Black or African American alone %	13.1%	16.9%	13.4%
American India/Alaska Native alone %	0.5%	0.5%	1.3%
Asian alone %	5.0%	3.0%	5.9%
Native Hawaiian/Pacific Islander %	0.1%	0.1%	0.2%
Two or More Races %	2.9%	2.2%	2.8%
Hispanic or Latino %	22.5%	26.4%	18.5%
White alone, not Hispanic or Latino %	58.9%	53.2%	60.1%
Foreign born persons %, 2015-19	14.1%	20.7%	13.6%
Language other than English spoken at home % of persons ages 5 years+, 2015-19	23.4%	29.4%	21.6%
Owner-occupied housing unit rate, 2015-19	64.6%	65.4%	64.0%
Median value of owner-occupied housing units, 2015-19	$242,600	$215,300	$217,500
Households, 2015-19	173,668	7,736,311	120,756,048
Persons per household, 2015-19	2.63	2.65	2.62
Land area in square miles, 2010	309.22	53,625	3,531,905
Population per square mile, 2020	1,522.7	401.6	93.8

[4] BEBR website, Table 6. Annual Net Migration by County in Florida, 2010–2020

Technology Penetration. County levels of households with a computer (95.2%) and with a broadband Internet subscription (90.1%) are higher than the Florida and U.S. averages, from 3.7 percent (computers) to 7.4 percent (Internet).

Education. For those ages 25 and older living in Seminole County, the percentages of graduates from high school (95.2%) and from college (39.6%) are higher than State and national levels – with deviations of ranging from 3.7 to 9.7 percent.

Retail Sales. Total retail sales per capita in Seminole County are higher than both Florida and the U.S. – at $16,82 versus $14,177 and $13,443 respectively.

Employment & Income. County employment is 6.6% and 2.1% higher than the State and national levels, respectively. At $35,175, Seminole County ranks higher in per capita income – at just over $3,500 more than the Florida average, and $1,072 more than the United States average. Seminole County's median household income is significantly higher in comparison with Florida – $66,768 (County) versus $55,660 (State) and $62,843 (U.S.) – or 120% of the State income average per household. Not surprisingly, Seminole County has a lower rate of persons living in poverty (9.3%) in comparison with Florida (12.7%) and the U.S. (11.4%). Average travel time to work for Seminole County workers ages 16 years+ is 27.5 minutes, very similar to Florida workers (27.8), and less than a minute more than nationally.

Local Businesses. The Census figures for number and ownership of firms are from 2012 and are only comparable when analyzing per capita metrics. Of note, Seminole County had slightly more Women-owned businesses, and significantly more Minority-owned firms than the State and the U.S., on a per capita basis.

See Appendix 4.2 for the complete set of statistics from U.S. Census' *QuickFacts* comparing 2019 figures for Seminole County, Florida, and the U.S.

Consultant Observations: In no particular order, these metrics in which Seminole County differs from Florida and the United States impact library service in the County, and/or demand for same:

- Higher than average retail sales in County suggests some sales tax revenue may come from non-County residents.
- Higher education in Seminole has led to higher income levels, which in turn create higher levels of technology penetration in County households.
- The higher number of local businesses per capita suggests a small business prevalence in the County.

Table 4.2 *(continued)*
Seminole County Demographics Comparisons, 2020

fact	*Seminole County*	*Florida*	*United States*
Households with a computer %, 2015-19	95.2%	91.5%	90.3%
Households with a broadband Internet subscription %, 2015-19	90.1%	83.0%	82.7%
High school graduate or higher % of persons ages 25 years+, 2015-19	95.2%	91.5%	90.3%
Bachelor's degree or higher % of persons ages 25 years+, 2015-19	39.6%	29.9%	32.1%
With a disability, under age 65 years %, 2015-19	7.1%	8.6%	8.6%
Persons without health insurance, under age 65 years %	11.4%	16.3%	10.2%
Veterans, 2015-19	27,558	1,440,338	18,230,322
Total retail sales, 2012 ($1,000)	6,972,028	273,867,145	4,219,821,871
Total retail sales per capita, 2012	$16,182	$14,177	$13,443
In civilian labor force, total % of population ages 16 years+, 2015-19	65.1%	58.5%	63.0%
Mean travel time to work (minutes), workers ages 16 years+, 2015-19	27.5	27.8	26.9
Median household income (in 2018 dollars), 2015-19	$66,768	$55,660	$62,843
Per capita income in past 12 months (in 2018 dollars), 2015-19	$35,175	$31,619	$34,103
Persons in poverty %	9.3%	12.7%	11.4%
All firms, 2012	46,692	2,100,187	27,626,360
Men-owned firms, 2012	24,154	1,084,885	14,844,597
Women-owned firms, 2012	17,156	807,817	9,878,397
Minority-owned firms, 2012	13,200	926,112	7,952,386
Veteran-owned firms, 2012	4,420	185,756	2,521,682

Source: U.S. Census *QuickFacts,* downloaded on October 1, 2021

Predictive Demographics – Indicators of Library Use

Library use in a typical community can be linked to characteristics of the general populous. Throughout the years, the Consultants have studied the demographics of countless libraries. We consistently find that three demographic indicators usually predict higher levels of use of the public library. As presented in Table 4.3, the Consultants analyzed specific demographic data related to these three indicators to obtain a better understanding of Seminole County and its needs:

- ***Education Attainment Level.*** The number one predictor of library usage is the level of educational attainment. Rural or metropolitan, the more educated the community, the greater the reverence for the public library. About one in 20 of Seminole County residents age 25+ do not have a high school diploma. The County's traits for having a Bachelor or higher degree eclipse national and State averages.
- ***Presence of Children in the Home.*** The second significant predictor is household type, specifically households with children living at home. For Seminole County, this holds to be somewhat true – with almost one-third of households having children living in the home. Families that use the public library give their kids a head start when beginning their formal K-12 education process.
- ***Homeownership.*** The third important indicator is homeownership. Persons who own their home tend to make more use of the public library than those who rent due to the understanding that, as a taxpayer, some of their property taxes are supporting the public library. The owner-occupied housing rate in Seminole County is virtually the same as the State and the nation.

Consultant Observations: By the aggregate totals, Seminole County exhibits the traits for high library use, as well as these nuances:

- The Consultants theorize that the high regard for education in Seminole County spurs the demand for early childhood development, prior to compulsory K-12 education.
- Levels of homeownership may be neither a plus or a minus contributor to overall Library usage in Seminole County, but it may influence Library use in specific communities.
- The proportions of children and teenagers under age 18 (a combined 20.8% of the Seminole County general population) indicate a significant tendency of children in the home – and a need for a vibrant library service program for children and their caregivers.

Table 4.3
Seminole County Demographics – Indicators of Library Use

fact	*Seminole County*	*Florida*	*United States*
Persons ages 25 years+ without a high school diploma or equivalent	5.7%	11.8%	12.0%
Persons ages 25 years+ with a Bachelor's degree or higher	39.6%	29.9%	32.1%
Households with children ages 0-17 in the home	31.2%	35.8%	38.9%
Owner-occupied housing units	64.6%	65.4%	64.0%

Sources: U.S. Census Bureau, DemograhicReports.com, statistica.com

Population & Demographics of Communities in the County

Seminole County is currently home to seven municipalities. The Consultants reviewed data found on the Seminole County website that provided demographics County-wide and for persons living within these seven cities:

- Altamonte Springs.
- Casselberry.
- Lake Mary.
- Longwood.
- Oviedo.
- Sanford
- Winter Springs

Those reports for each of the seven communities are contained in Appendices 4.4.1 through 4.4.7. Sources of these data were from Esri forecasts for 2020 and 2025 estimates, and the U.S. Census Bureau for the 2010 and 2020 Census, where population was defined by each municipality's city limits.

To help SCPL plan for the immediate future through a better understanding of their future/potential customers, the Consultants chose to use 2025 projections when available, rather than analyze historic data. When not available, 2020 US Census QuickFacts statistics were used.

At right, Table 4.4 ranks the seven cities using 2025 projections for each. A summary of findings from the Seminole County website includes:

1. ***Total Population.*** Sanford will continue to be the most populous city. Indeed, current rankings are projected to remain the same through 2025.
2. ***Children in the Home.*** Sanford is projected to have a higher percentage of children than any of the cities by 2025, eclipsing Oviedo. Longwood will become third, followed closely by Winter Springs, then Lake Mary.
3. ***Household Income.*** Lake Mary, Oviedo, and Winter Springs will be the wealthiest of the seven communities. Sanford and Casselberry will have the highest percentages of incomes below $50,000.
4. ***Housing.*** Winter Springs and Oviedo will have the highest percentages of owner-occupied homes in the area. Lake Mary and Longwood will rank high in percentage but will rank at the bottom in quantity due to their smaller populations. Households in Oviedo will average 2.98 persons, followed by Sanford (2.67) and Longwood (2.59) – predominately paralleling the ranking of children in the home.

Table 4.4
Seminole County Municipality Demographics – Ranking City Metrics

1 rank	city	total 2025 population
1	Sanford	67,224
2	Altamonte Springs	48,366
3	Oviedo	43,095
4	Winter Springs	41,324
5	Casselberry	31,866
6	Lake Mary	18,437
7	Longwood	16,253
	average:	35,568

2 rank	city	2025 % under age 20
1	Sanford	27.3%
2	Oviedo	23.7%
3	Longwood	20.7%
4	Winter Springs	20.6%
5	Lake Mary	20.4%
6	Altamonte Springs	20.2%
7	Casselberry	19.5%
	average:	22.6%

3a rank	city	2025 median household income
1	Oviedo	$107,449
2	Lake Mary	$103,758
3	Winter Springs	$86,257
4	Longwood	$74,117
5	Altamonte Springs	$60,147
6	Casselberry	$54,589
7	Sanford	$52,963
	average:	*n/a*

3b rank	city	2025 % of HH income < $50K
1	Sanford	46.5%
2	Casselberry	43.3%
3	Altamonte Springs	36.9%
4	Winter Springs	25.4%
5	Longwood	20.7%
6	Lake Mary	17.4%
7	Oviedo	17.2%
	average	33.2%

4a rank	city	2025 owner occupied housing %
1	Winter Springs	73.7%
2	Oviedo	73.3%
3	Lake Mary	67.7%
4	Longwood	64.9%
5	Casselberry	48.5%
6	Sanford	47.9%
7	Altamonte Springs	38.4%
	average:	55.8%

4b rank	city	2025 household size
1	Oviedo	2.98
2	Sanford	2.67
3	Longwood	2.59
4	Winter Springs	2.56
5	Lake Mary	2.50
6	Casselberry	2.33
7	Altamonte Springs	2.18
	average	2.53

Note: *n/a = data not available.*

Table 4.4 continues, populated with 2020 stats from US Census QuickFacts. A summary of findings includes:

5. ***Educational Attainment.*** Of the seven communities, Oviedo ranks first in college degree attainment, ahead of Winter Springs and Lake Mary. Sanford, Longwood, and Casselberry are home to the lowest percentages of college-degreed persons of the seven.
6. ***Labor Force.*** Employment of persons ages 16 and older in the seven cities shows Altamonte Springs has the highest rate at 70.8% while Casselberry has the lowest employment at 62.9%, slightly below the County average of 65.1%.
7. ***Persons in Poverty.*** Sanford, Casselberry, and Altamonte Springs have the highest number of persons living below the poverty level, at 16.6, 16.1, and 10.9 percent respectively.
8. ***Languages Spoken Other than English.*** Altamonte Springs, Casselberry rank first, second, and third, respectively for languages other than English spoken in their homes.
9. ***Population Density.*** Altamonte Springs has an urban density of 5,136.8 persons per square mile, denser than many of the nation's most populous cities (San Diego at 4,256, Dallas at 3,841, Houston at 3,599, and Phoenix at 3,105).

Additional Metrics/ Consultant Observations: Other statistics of note:

- ***Number of Businesses.*** Altamonte Springs has the highest number of firms at 6,010, followed by Sanford at 5,221 and Oviedo at 3,522.
- ***Number of Vehicles per Household.*** Only 3.6% of households in Seminole County have no vehicle, 33.7 percent have only one vehicle, and 71.5% of vehicles in the County are owned by owner-occupied households.
- ***Higher densities*** are expected in the non-rural areas, but Casselberry, and Altamonte Springs were a surprise. Given their proximity to each other, these two cities comprise the densest area in the County, by far.
- Not necessarily a correlation, but Sanford, Casselberry, and Altamonte Springs rank in the top three persons living in poverty, income below $50,000, and languages other than English spoken in the home.

Table 4.5 (on the next page) compares the demographics of Seminole County with its seven largest municipalities, using data obtained from the County's website, followed by additional Consultant observations.

Table 4.4 *(continued)*
Seminole County Municipality Demographics – Ranking City Metrics

5a rank	city	2020 Bachelor degree %
1	Oviedo	53.2%
2	Winter Springs	49.6%
3	Lake Mary	49.5%
4	Altamonte Springs	39.0%
5	Casselberry	31.2%
6	Longwood	27.6%
7	Sanford	25.4%
	average:	38.7%

5b rank	city	2020 High School diploma %
1	Winter Springs	73.7%
2	Oviedo	73.3%
3	Lake Mary	67.7%
4	Longwood	64.9%
5	Casselberry	48.5%
6	Sanford	47.9%
7	Altamonte Springs	38.4%
	average	93.9%

6 rank	city	2020 % employed age 16+
1	Altamonte Springs	70.8%
2	Oviedo	70.4%
3	Longwood	67.9%
4	Winter Springs	65.0%
5	Lake Mary	64.9%
6	Sanford	64.4%
7	Casselberry	62.9%
	average:	66.7%

7 rank	city	2020 % living in poverty
1	Sanford	16.6%
2	Casselberry	16.1%
3	Altamonte Springs	10.9%
4	Longwood	9.1%
5	Winter Springs	7.0%
6	Oviedo	5.4%
7	Lake Mary	4.2%
	average:	

8 rank	city	languages spoken in home
1	Altamonte Springs	30.3%
2	Casselberry	28.7%
3	Sanford	27.9%
4	Oviedo	21.8%
5	Winter Springs	21.0%
6	Lake Mary	18.1%
7	Longwood	15.8%
	average:	25.0%

9 rank	city	persons per square mile
1	Altamonte Springs	5,136.8
2	Casselberry	4,113.4
3	Longwood	2,743.1
4	Sanford	2,654.4
5	Oviedo	2,635.5
6	Winter Springs	2,608.3
7	Lake Mary	1,825.9
	average:	2,946.9

Table 4.5
Demographic Comparisons of Seminole County with Its Largest Municipalities

metric	*Seminole County*	*Altamonte Springs*	*Casselberry*	*Lake Mary*	*Longwood*	*Oviedo*	*Sanford*	*Winter Springs*
Total Population								
2010	422,718	41,550	25,959	13,758	13,616	33,406	53,979	33,332
2020	470,856	46,290	29,834	16,704	15,409	40,299	61,678	38,764
2025	505,142	48,366	31,866	18,437	16,253	43,095	67,224	41,324
Age Cohorts								
0 to 9	49,597	1,707	3,149	1,707	1,622	4,713	9,528	3,746
10 to 19	52,912	2,044	3,060	2,044	1,743	5,485	8,797	4,749
20 to 64	313,907	35,966	19,449	10,446	9,054	26,644	39,878	24,213
65+	88,726	8,649	6,208	4,240	3,834	6,253	9,021	8,616
Median Age	38.2	39.3	40.2	45.7	43.6	37.8	34.8	43.3
Education Attainment								
High School grad or higher	94.4%	94.7%	92.3%	97.2%	92.0%	96.6%	89.9%	96.8%
Bachelor degree or higher	41.0%	39.0%	31.2%	49.5%	27.6%	53.2%	25.4%	49.6%
Households - Projected by 2025								
Total	195,486	22,037	13,623	7,191	6,227	14,365	24,725	16,116
% with Children	46.6%	44.0%	43.3%	47.1%	47.1%	46.7%	52.7%	46.5%
Housing Units - Projected by 2025								
Owner-Occupied	125,300	8,463	6,607	4,866	4,040	10,527	11,855	11,881
Renter-Occupied	82,758	13,574	7,016	2,325	2,187	3,838	12,869	4,235
% Owner-Occupied	60.2%	38.4%	48.5%	67.7%	64.9%	73.3%	47.9%	73.7%
Technology in Homes								
Households with computers	96.1%	95.7%	96.0%	97.7%	94.9%	97.7%	92.6%	96.3%
Households with Internet	91.4%	91.1%	87.6%	96.2%	89.7%	95.6%	85.1%	92.1%
Language Spoken in Homes								
Other than English	23.4%	30.3%	28.7%	18.1%	15.8%	21.8%	27.9%	21.0%

Sources: Esri historic & 2025 projections based on U.S. Census-designated cities/towns as census-designated places.

Consultant Observations: Looking into the near future (2025), demographic projections indicate a continuation of historic trends in Seminole County – the communities of Sanford and Casselberry having a number of residents with a likely need for library service and Lake Mary, Oviedo, and Winter Springs showing strong indicators of likely library usage.

Statistically speaking, Altamonte Springs and Longwood are located somewhere in between, with combinations of potential need (lower technology penetration and significant percentage of children in Longwood) and likely use (languages other than English and above average educational attainment).

Analysis of Community Libraries

The Consultants also acquired demographic data so we could delve deeper into the characteristics of the neighborhoods where the six public libraries are located, looking at library service indicators and needs in each. Five of the six are branches of the Seminole County Public Library System. Altamonte Springs is the only public library in the County that is not part of SCPL. The complete data are presented in Appendix 4.6. This Section highlights some of the details.

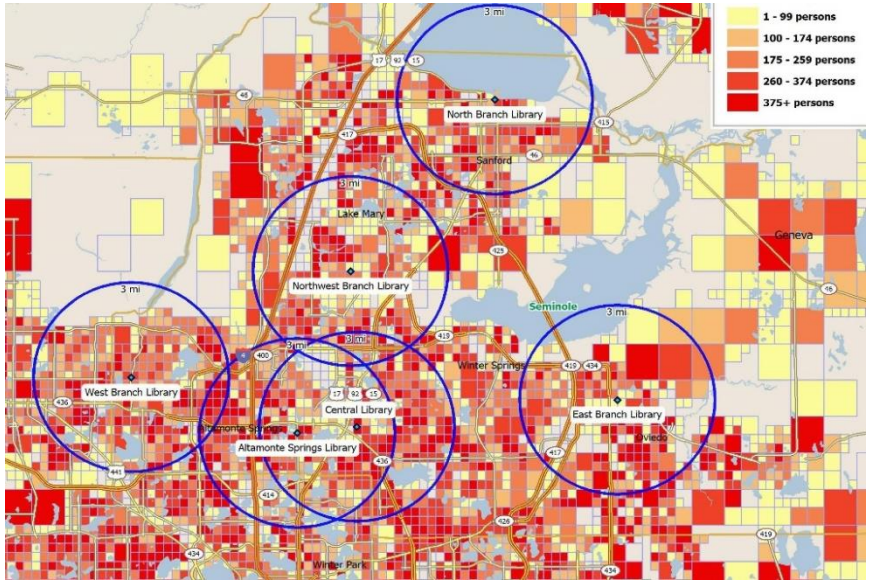
Data was commissioned from *DemographicReports,* of Laguna Nigel, California – allowing the Consultants to compare characteristics of the general Seminole County population with residents of the communities living in proximity to a branch of the Seminole County Public Library system. The Consultants analyzed statistics from within three-mile diameters centered on each public library in the County, as depicted in Figure 4.1, maps the rings around the Altamonte Springs location, all five SCPL locations, and population density, in persons per square mile, graded according to the legend in the upper right corner of the map. Table 4.6 contains some comparative public library service data that was available for the six locales.

Consultant Observations. The available data regarding the six libraries shows that Seminole County is providing more hours of service and is open more days than the Altamonte Springs City Library, which also has the smallest facility by far, in terms of space per capita and total square footage.

The Florida Library Association's *Florida Public Library Outcomes & Standards 2015* establishes guidelines for library size based on population served. Up to 25,000 population should have total gross square feet per capita of 0.8 square feet. Populations above 25,000 people should have total gross square feet per capita of 0.6 square feet. The disparity regarding accessibility due to the lower number of hours and days open for the Altamonte Springs Library may be a result of the COVID-19 impact.

The overlap of the Altamonte Springs City Library and Seminole County Central Library delineates the population shared between the two facilities, indicating a potential for duplication of service. Conversely, other overlaps are minimal, revealing gaps between the various locations. Of particular note is that almost half of the Sanford Library ring includes Lake Monroe, demonstrating that location's limitations in terms of being within convenient access for the greatest number of residents.

Figure 4.1
Public Library Locations in Seminole County – Population Density Overlay



Source: *Scan/US January 1, 2021 Estimates & 2020 US Census*

Table 4.6
Comparisons of Public Libraries in Seminole County Municipalities

Library-locale	*building size, in square feet*	*3-mile ring population*[a]	*square feet per capita*[b]	*days open per week*	*hours open per year*
Altamonte Springs	8,240	90,262	0.09	6	2,451
Central-Casselberry	48,718	91,974	0.53	7	3,273
Northwest-Lake Mary	12,092	63,872	0.19	7	3,273
West-Longwood	12,092	77,047	0.16	7	3,273
East-Oviedo	12,092	50,721	0.24	7	3,273
North-Sanford	12,474	37,872	0.33	7	3,273
	105,708	Total public library square feet in County			
	97,468	Seminole County Library total square feet			

Notes: *a = There is duplication of population due to overlapping rings.*
b = Based on the population falling within the 3-mile ring.

Distances between Libraries. A chart showing distances and drive-times between libraries in the communities is presented in Table 4.7.

Table 4.7
Comparisons of Distance between Libraries, in Miles & Minutes of Drive-time

library	*Central Library*	*East Branch*	*North Branch*	*Northwest Branch*	*West Branch*	*Altamonte Springs**	*Winter Springs***
Central Library		9.9 miles/ 21 minutes	12.7 miles/ 27 minutes	7.4 miles/ 17 minutes	9.2 miles/ 26 minutes	2.5 miles/ 9 minutes	7.1 miles/ 14 minutes
East Branch	9.9 miles/ 21 minutes		12.8 miles/ 20 minutes	12.8 miles/ 20 minutes	18.2 miles/ 35 minutes	12.1 miles/ 27 minutes	15.4 miles/ 19 minutes
North Branch	12.7 miles/ 27 minutes	12.8 miles/ 20 minutes		9.7 miles/ 19 minutes	18.9 miles/ 27 minutes	17.5 miles/ 28 minutes	10.4 miles/ 15 minutes
Northwest Branch	7.4 miles/ 17 minutes	12.8 miles/ 20 minutes	9.7 miles/ 19 minutes		11.1 miles/ 24 minutes	6.5 miles/ 16 minutes	13.7 miles/ 22 minutes
West Branch	9.2 miles/ 26 minutes	18.2 miles/ 35 minutes	18.9 miles/ 27 minutes	11.1 miles/ 24 minutes		7.5 miles/ 20 minutes	13.7 miles/ 23 minutes
*Altmonte Springs**	2.5 miles/ 9 minutes	12.1 miles/ 27 minutes	17.5 miles/ 28 minutes	6.5 miles/ 16 minutes	7.5 miles/ 20 minutes		6.3 miles/ 14 minutes
*Winter Springs***	7.1 miles/ 14 minutes	15.4 miles/ 19 minutes	10.4 miles/ 15 minutes	13.7 miles/ 22 minutes	13.7 miles/ 23 minutes	6.3 miles/ 14 minutes	

* To/from Altamonte Springs City Library
** To/from Winter Springs City Hall

Conclusions

The Consultants summarize the findings of this Section, as follows:

- Seminole County's projected 20-year growth of 18.5% over 2020 may be overly conservative, given national, state, and local trends of migration and land use.
- Education levels and incomes are higher than average. Unemployment and poverty rates are lower than average.
- The Seminole County population is younger than the Florida average and is home to families with children.
- Retail sales in Seminole County are higher than the State average, indicating the County is a commercial center and an economic engine for the Orlando region.
- SCPL provides more hours of service and is open more days per week than the only independent municipal public library in the County.

Consultant Observations. Based on this data, the Consultants have developed a clear picture of the greater Seminole County marketplace. Given the balance of the demographics, there are few significant differences between the relative populations of the locales, but the anomalies highlighted herein are significant. Seminole County not only exhibits some of the primary indicators for strong library use, but local municipalities also share in several of those characteristics – with the potential to benefit from expanded library services.

Library Service Opportunities. While not definitive predictors of library usage by themself, metrics such as age cohort and technology penetration are important tools in planning for library services and how a building should be designed and furnished. As an example, almost one in six Seminole County residents is 65 years or older and have more discretionary time on their hands than younger residents. This is an important distinction for both library services and the physical space. The Seminole County Public Library system has an opportunity to improve quality of life through support of jobs skills training and small business incubation – as ways to grow more and better local jobs, thereby increasing incomes.

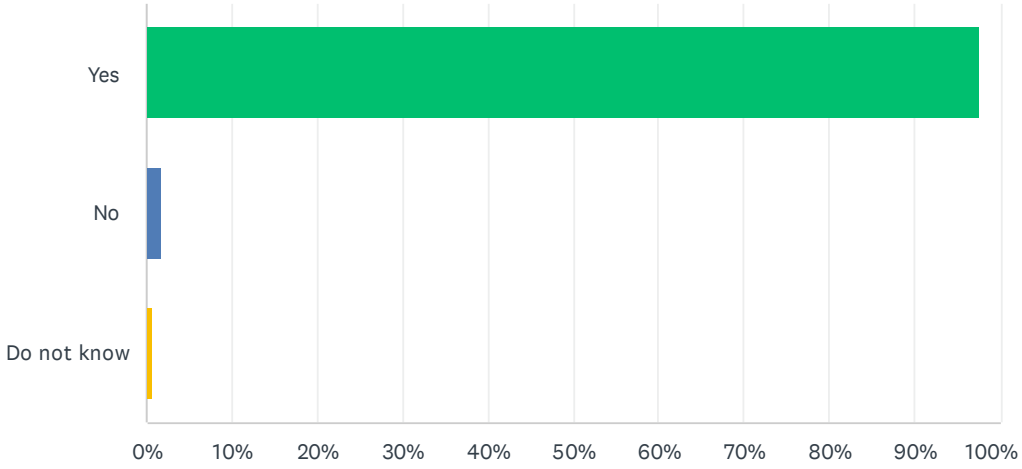
Summary of Demographics Analysis. Data summarized in the Appendices can allow readers to compare and contrast metrics from the State of Florida and the United States with Seminole County. The observations we offer about the opportunities available to SCPL to address early childhood education and job skills training can improve the learning and earning potential for all County residents, not only the less fortunate.

5 Seminole County Public Library Online Survey Results

- Combined Responses from English & Spanish Surveys held from May 1 to May 31, 2022

Q1 Do you have a Library Card from the Seminole County Library?

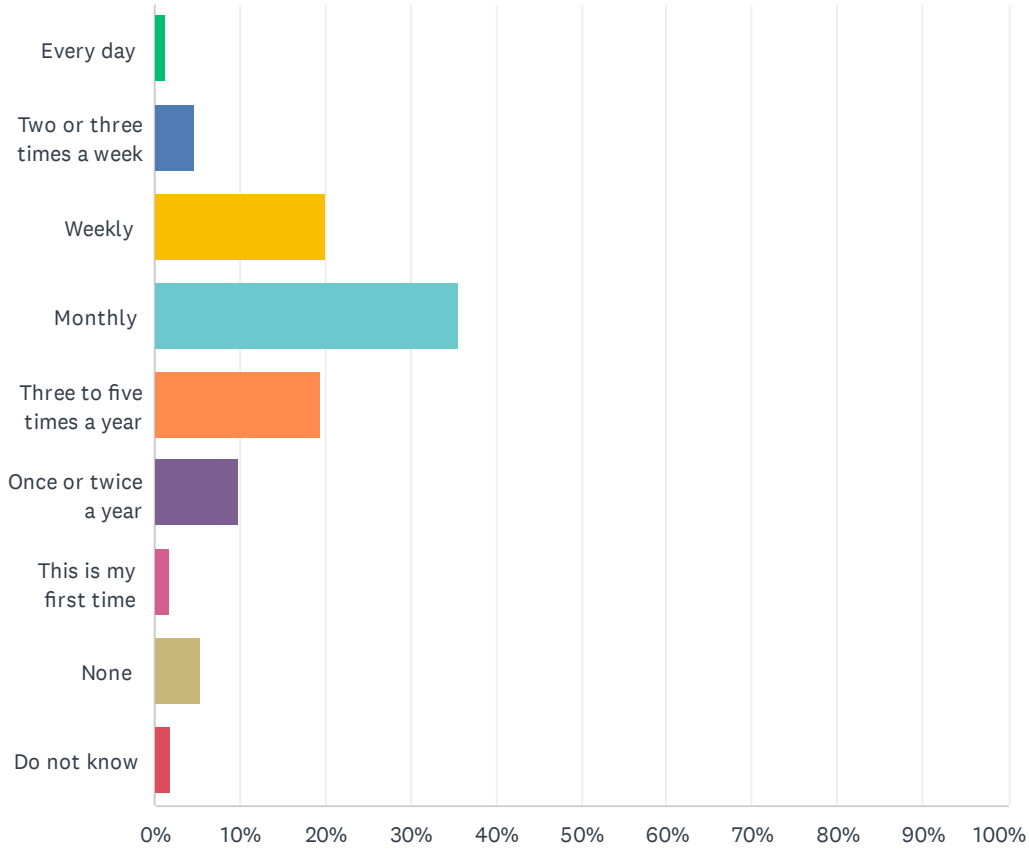
Answered: 6,888 Skipped: 29



ANSWER CHOICES	RESPONSES	
Yes	97.62%	6,724
No	1.68%	116
Do not know	0.70%	48
TOTAL		6,888

Q2 How many times have you personally used a Seminole County Public Library in the past year? CHECK ONLY ONE

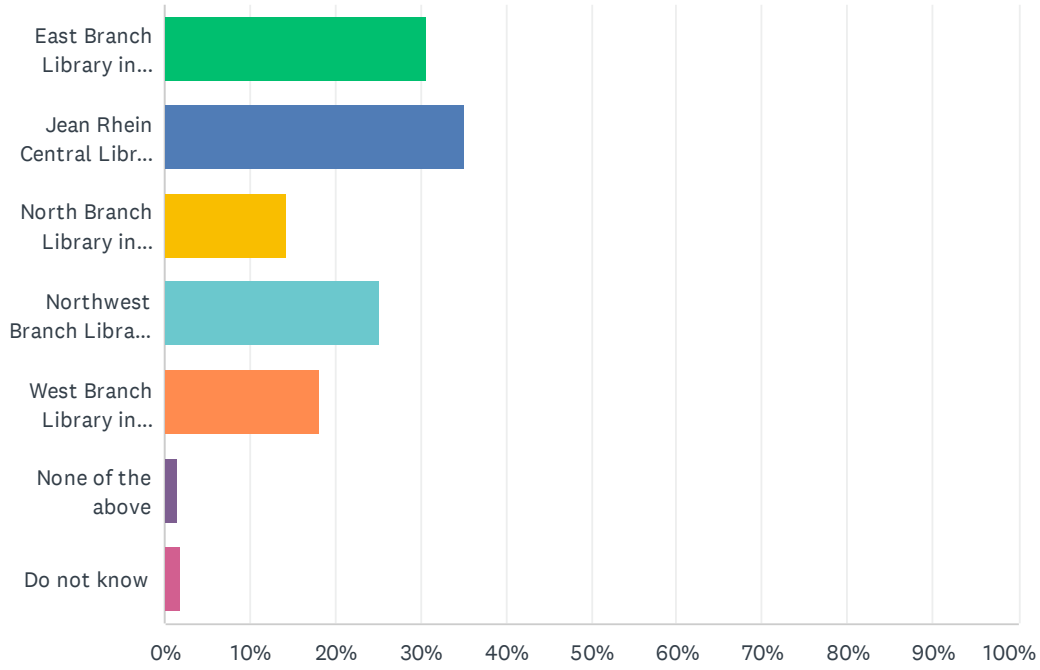
Answered: 6,887 Skipped: 30



ANSWER CHOICES	RESPONSES	
Every day	1.18%	81
Two or three times a week	4.78%	329
Weekly	20.14%	1,387
Monthly	35.65%	2,455
Three to five times a year	19.34%	1,332
Once or twice a year	9.90%	682
This is my first time	1.80%	124
None	5.29%	364
Do not know	1.93%	133
TOTAL		6,887

Q3 Which Library or libraries in Seminole County do you prefer to use? CHECK ALL THAT APPLY

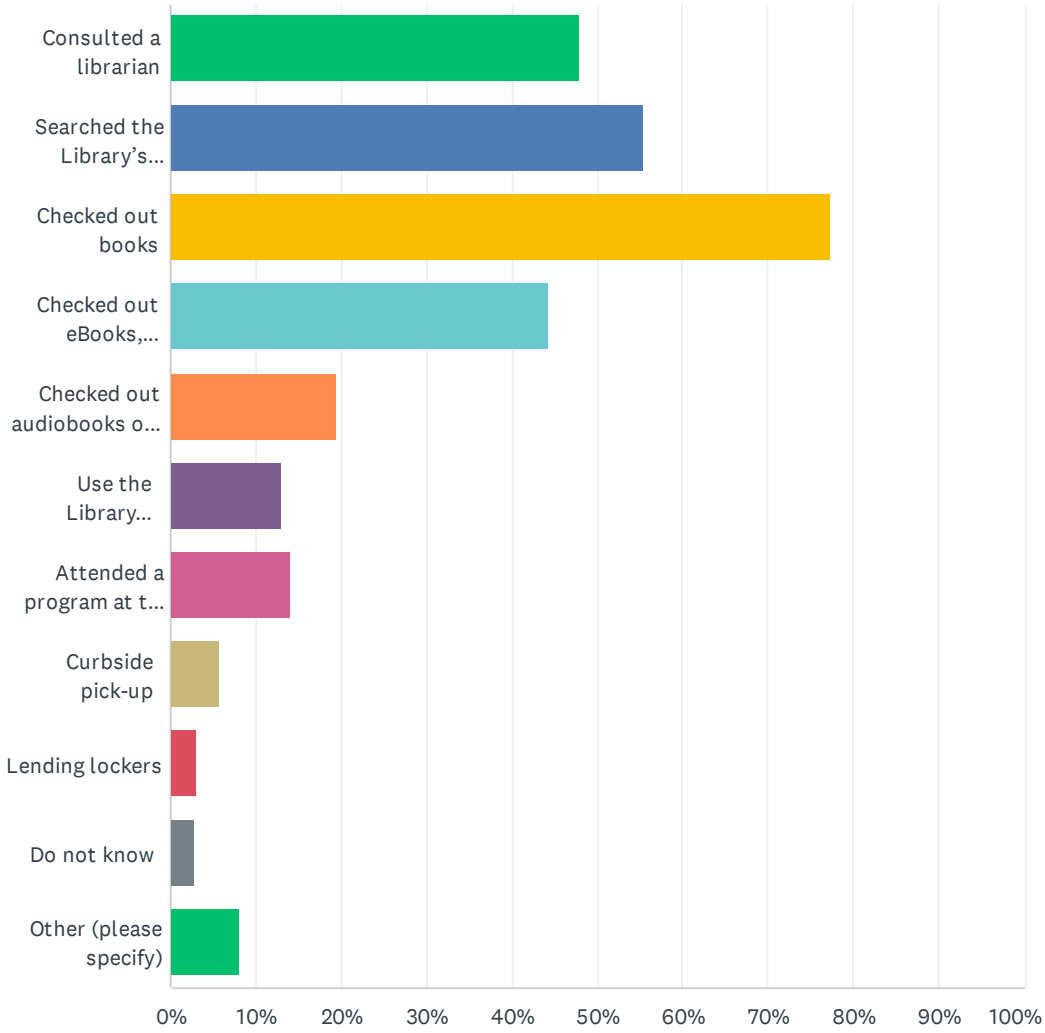
Answered: 6,882 Skipped: 35



ANSWER CHOICES	RESPONSES	
East Branch Library in Oviedo	30.70%	2,113
Jean Rhein Central Library in Casselberry	35.21%	2,423
North Branch Library in Sanford	14.18%	976
Northwest Branch Library in Lake Mary	25.12%	1,729
West Branch Library in Longwood	18.12%	1,247
None of the above	1.57%	108
Do not know	1.85%	127
Total Respondents: 6,882		

Q4 During the past year, which of the following library services did you use? CHECK ALL THAT APPLY

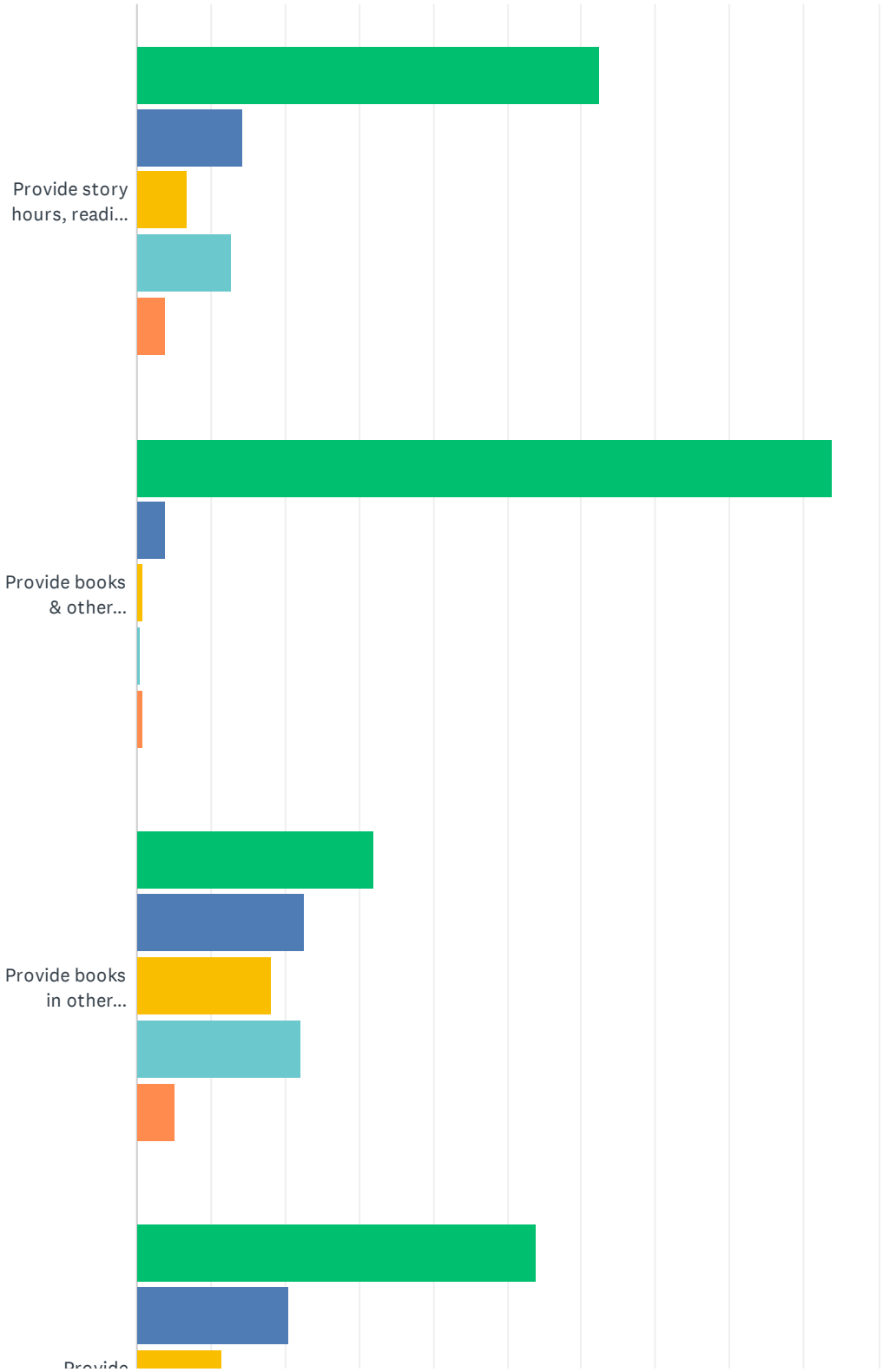
Answered: 6,769 Skipped: 148

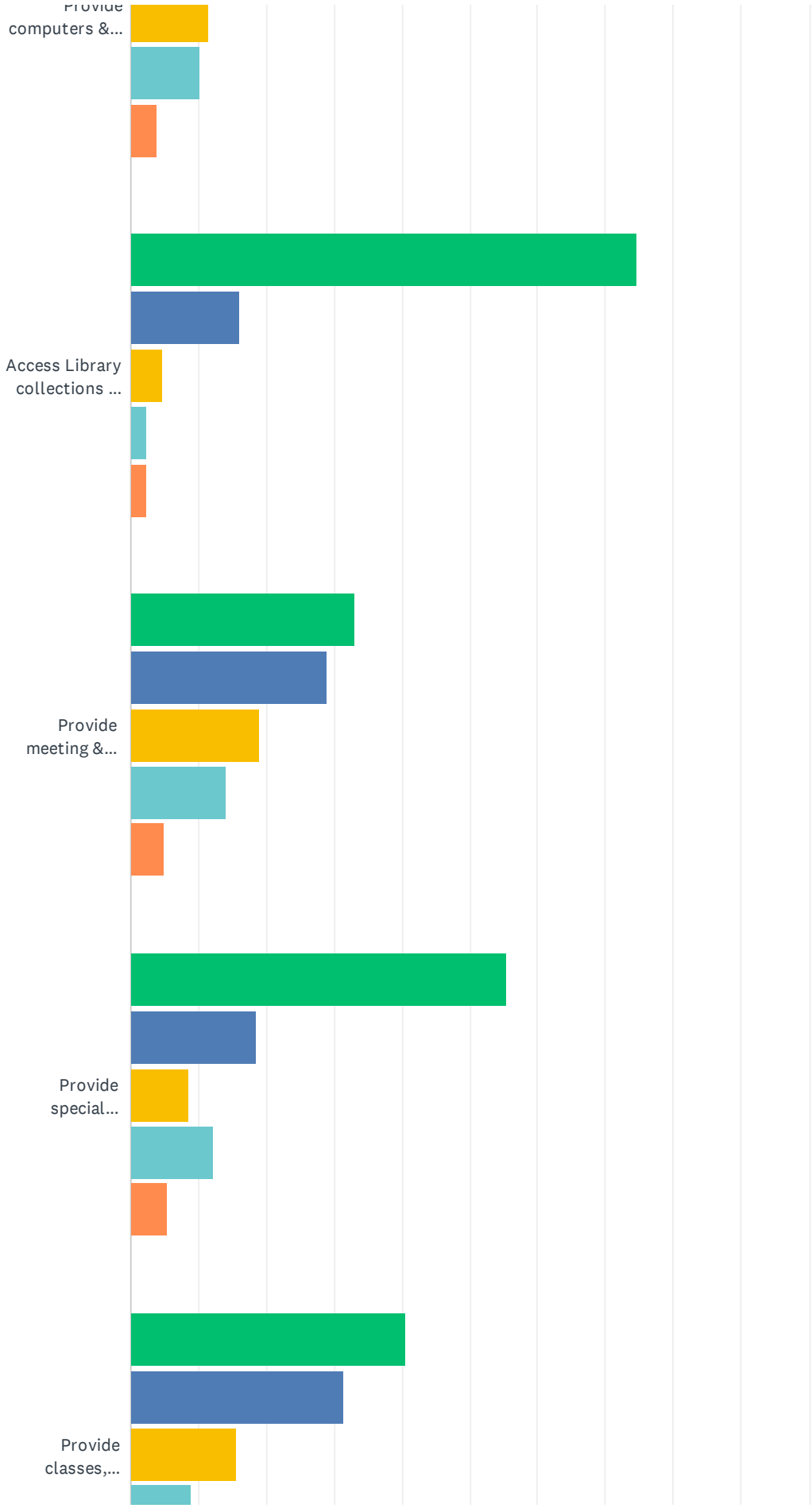


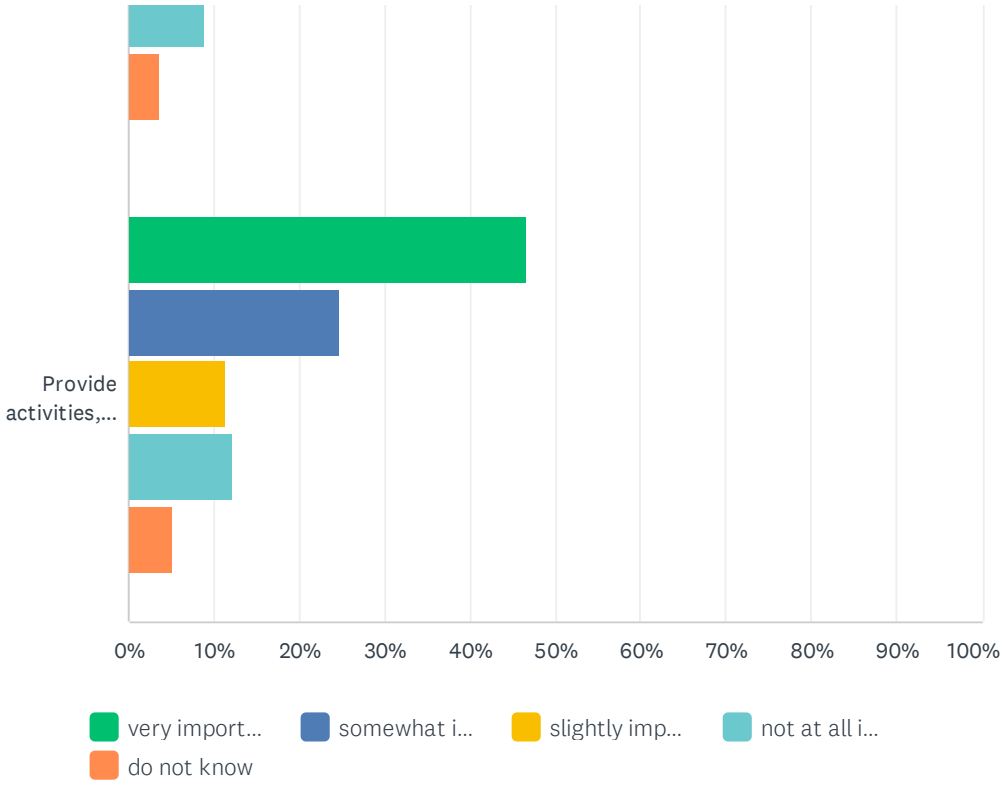
ANSWER CHOICES	RESPONSES	
Consulted a librarian	48.00%	3,249
Searched the Library’s catalog	55.49%	3,756
Checked out books	77.37%	5,237
Checked out eBooks, eAudiobooks, or used other digital content	44.29%	2,998
Checked out audiobooks or DVDs	19.49%	1,319
Use the Library computers for the Internet, e-mail, etc.	12.94%	876
Attended a program at the Library	14.08%	953
Curbside pick-up	5.67%	384
Lending lockers	3.00%	203
Do not know	2.72%	184
Other (please specify)	8.02%	543
Total Respondents: 6,769		

Q5 Here is a list of services the Library provides. Read the list and check whether each service is very important, somewhat important, slightly important, or not at all important to you.

Answered: 6,767 Skipped: 150



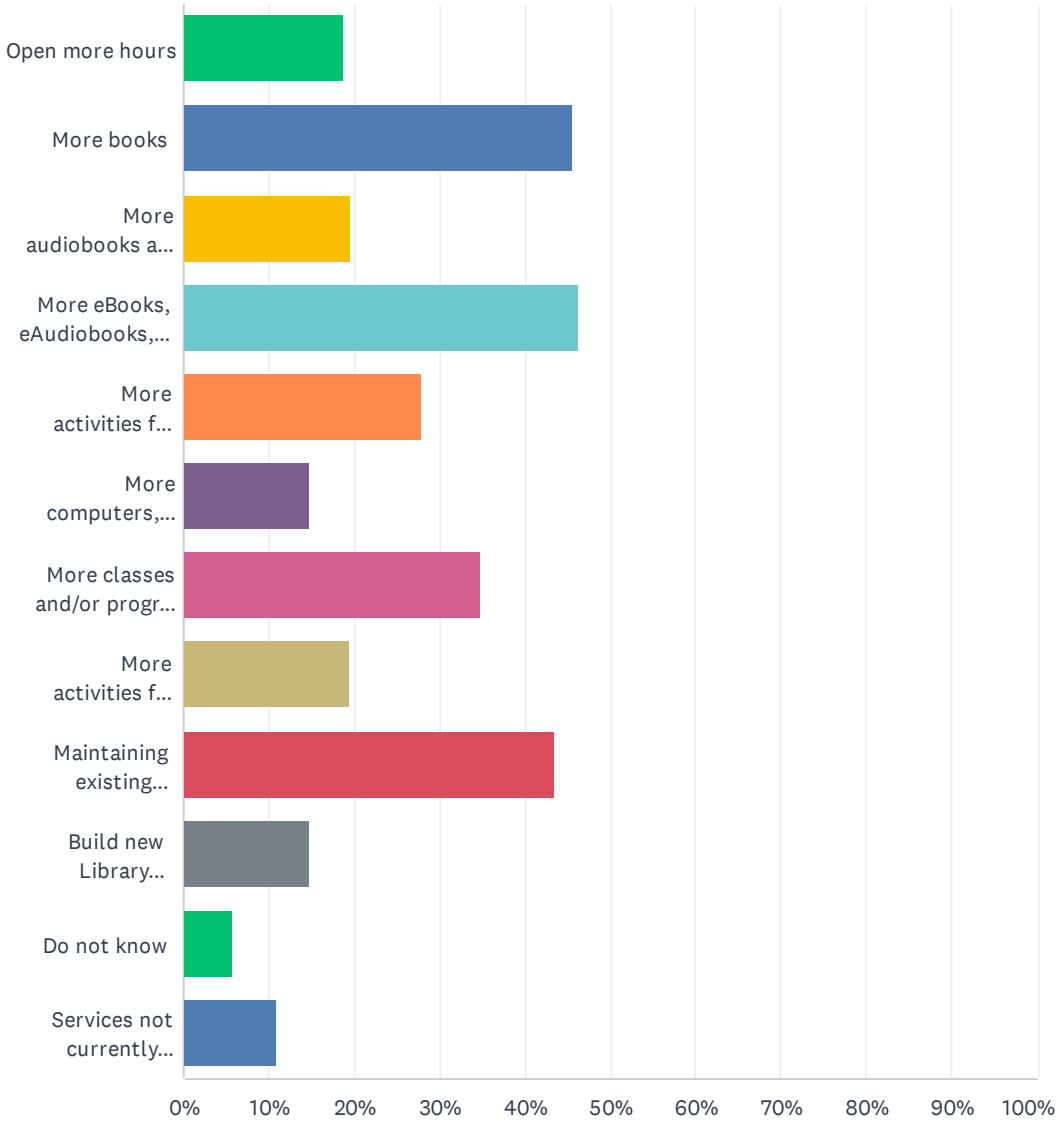

Provide computers &...
Access Library collections ...
Provide meeting &...
Provide special...
Provide classes,...



	VERY IMPORTANT	SOMEWHAT IMPORTANT	SLIGHTLY IMPORTANT	NOT AT ALL IMPORTANT	DO NOT KNOW	TOTAL	WEIGHTED AVERAGE
Provide story hours, reading programs & other learning activities for children	62.46% 4,158	14.20% 945	6.76% 450	12.75% 849	3.83% 255	6,657	1.97
Provide books & other materials	93.88% 6,287	3.85% 258	0.91% 61	0.40% 27	0.96% 64	6,697	1.15
Provide books in other languages	31.89% 2,099	22.69% 1,494	18.12% 1,193	22.27% 1,466	5.03% 331	6,583	2.66
Provide computers & online services	53.92% 3,525	20.45% 1,337	11.46% 749	10.33% 675	3.84% 251	6,537	2.05
Access Library collections & information from home computers	74.72% 5,008	15.91% 1,066	4.73% 317	2.34% 157	2.30% 154	6,702	1.51
Provide meeting & conference rooms for community groups & public activities	33.12% 2,203	28.94% 1,925	18.88% 1,256	14.12% 939	4.93% 328	6,651	2.49
Provide special equipment for visually & hearing-impaired customers	55.45% 3,679	18.60% 1,234	8.43% 559	12.19% 809	5.34% 354	6,635	2.15
Provide classes, lectures, book discussions & other programs for adults	40.47% 2,695	31.26% 2,082	15.60% 1,039	8.98% 598	3.69% 246	6,660	2.19
Provide activities, discussions & programs for teenagers	46.73% 3,096	24.66% 1,634	11.29% 748	12.23% 810	5.09% 337	6,625	2.25

Q6 What improvements would you like to see at the Library? CHECK ALL THAT APPLY

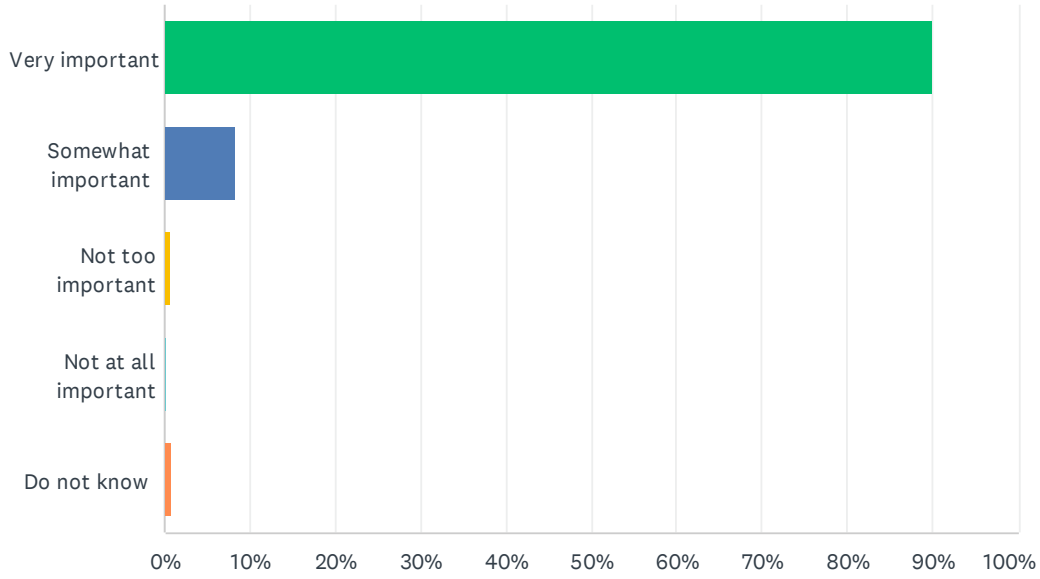
Answered: 6,668 Skipped: 249



ANSWER CHOICES	RESPONSES	
Open more hours	18.87%	1,258
More books	45.67%	3,045
More audiobooks and DVDs	19.69%	1,313
More eBooks, eAudiobooks, or other digital content	46.28%	3,086
More activities for children	27.97%	1,865
More computers, software, printers/scanners, and technology	14.61%	974
More classes and/or programs for adults	34.79%	2,320
More activities for teenagers	19.41%	1,294
Maintaining existing Library facilities	43.58%	2,906
Build new Library facilities	14.67%	978
Do not know	5.82%	388
Services not currently offered (please specify)	10.84%	723
Total Respondents: 6,668		

Q7 Overall, how important are the services provided by the Library? CHECK ONLY ONE

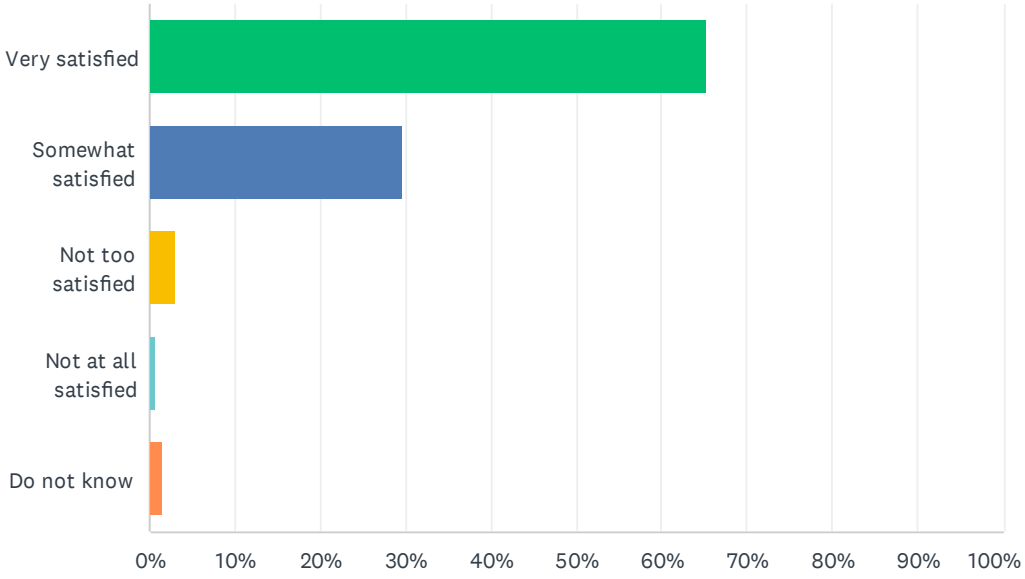
Answered: 6,785 Skipped: 132



ANSWER CHOICES	RESPONSES	
Very important	90.07%	6,111
Somewhat important	8.37%	568
Not too important	0.65%	44
Not at all important	0.15%	10
Do not know	0.77%	52
TOTAL		6,785

Q8 Overall, how satisfied are you with the Library? CHECK ONLY ONE

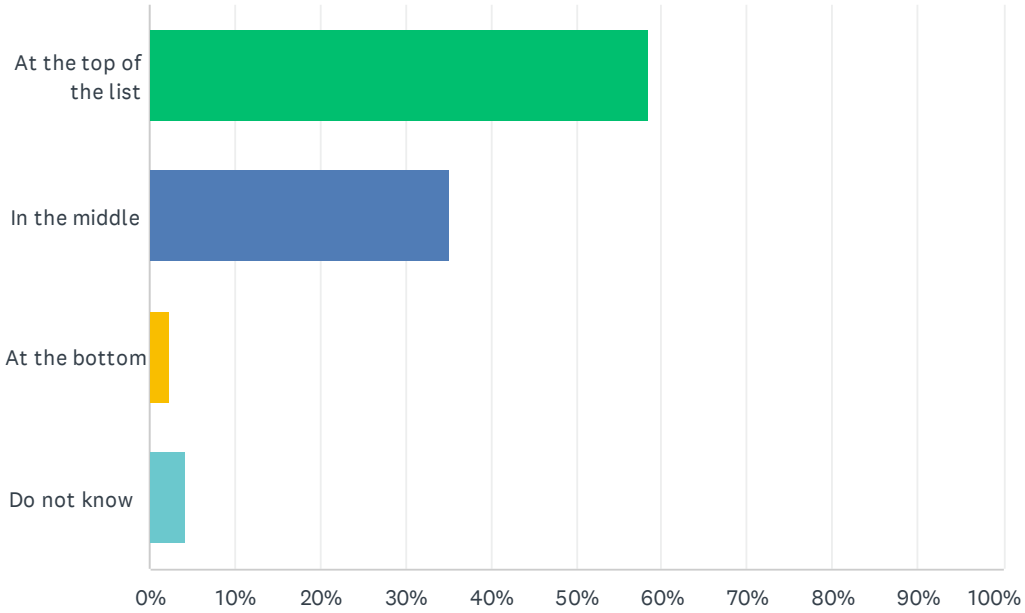
Answered: 6,768 Skipped: 149



ANSWER CHOICES	RESPONSES	
Very satisfied	65.19%	4,412
Somewhat satisfied	29.64%	2,006
Not too satisfied	3.07%	208
Not at all satisfied	0.64%	43
Do not know	1.46%	99
TOTAL		6,768

Q9 How would you rank the benefits of the Library as compared to the benefits of other tax-supported services, e.g. schools, parks, roads?

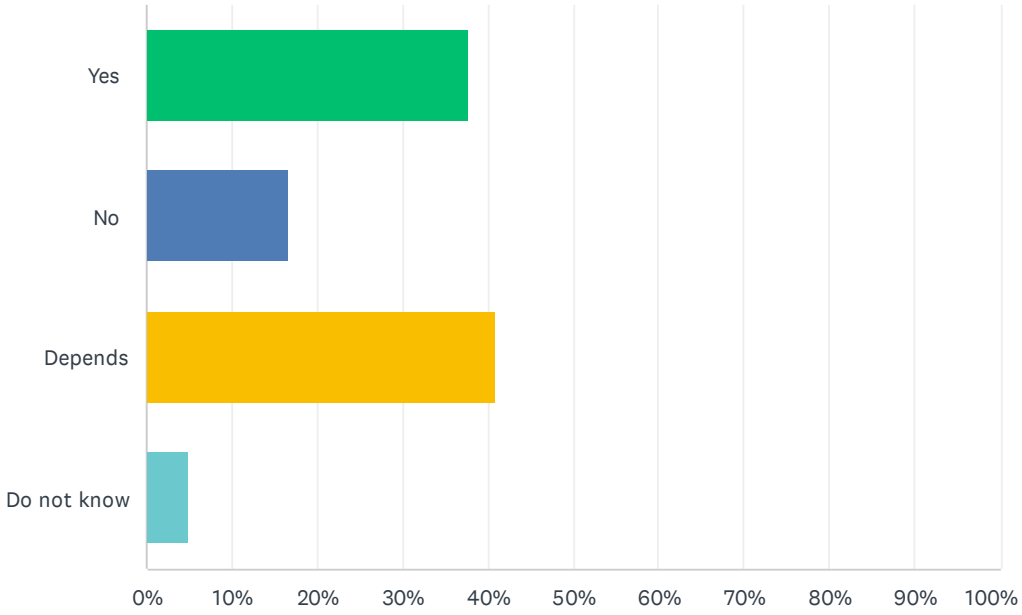
Answered: 6,774 Skipped: 143



ANSWER CHOICES	RESPONSES	
At the top of the list	58.36%	3,953
In the middle	35.21%	2,385
At the bottom	2.24%	152
Do not know	4.19%	284
TOTAL		6,774

Q10 Would you be in favor of a tax increase for improved public library services and/or more or larger facilities? CHECK ONLY ONE

Answered: 6,780 Skipped: 137



ANSWER CHOICES	RESPONSES	
Yes	37.67%	2,554
No	16.67%	1,130
Depends	40.86%	2,770
Do not know	4.81%	326
TOTAL		6,780

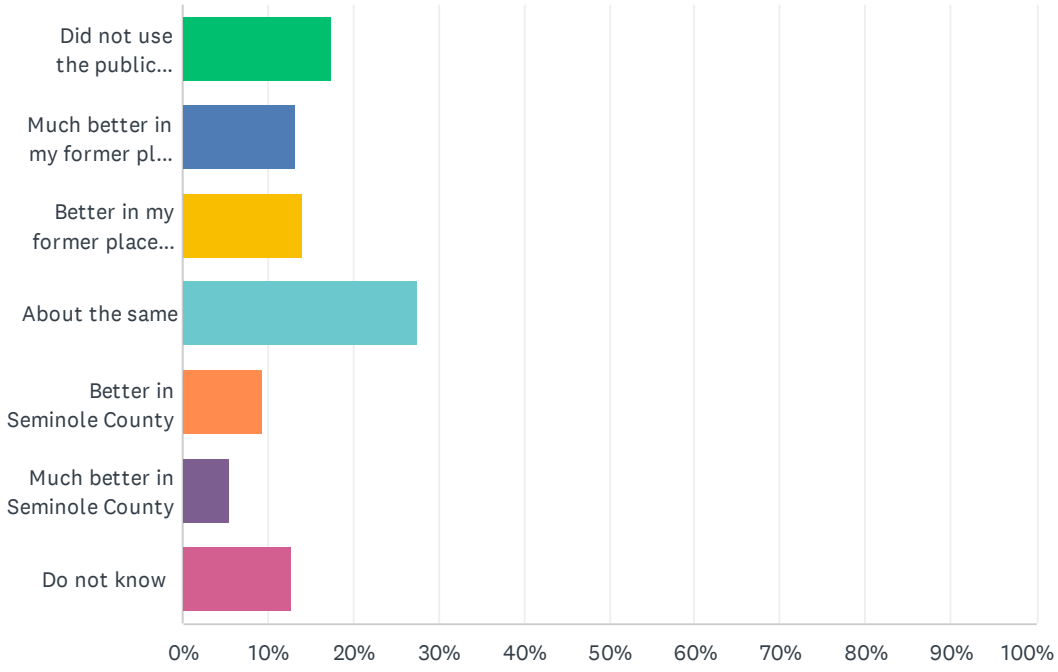
Q11 How many years have you lived in Seminole County?

Answered: 6,541 Skipped: 376

See the 173 pages of responses to this question under separate cover

Q12 If you used the public library at your place of residence prior to moving to Seminole County, how would you say the library services there compared to public library services in Seminole County?

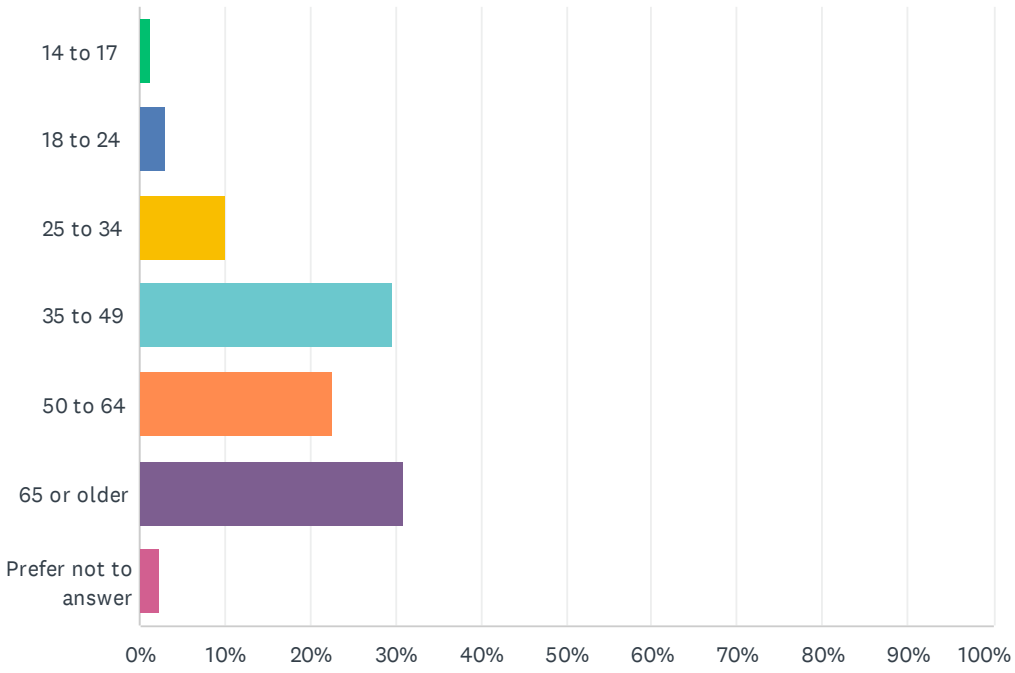
Answered: 6,667 Skipped: 250



ANSWER CHOICES	RESPONSES	
Did not use the public library in my former place of residence	17.49%	1,166
Much better in my former place of residence	13.20%	880
Better in my former place of residence	13.98%	932
About the same	27.60%	1,840
Better in Seminole County	9.48%	632
Much better in Seminole County	5.44%	363
Do not know	12.81%	854
TOTAL		6,667

Q13 Are you between the ages of...? CHECK ONLY ONE

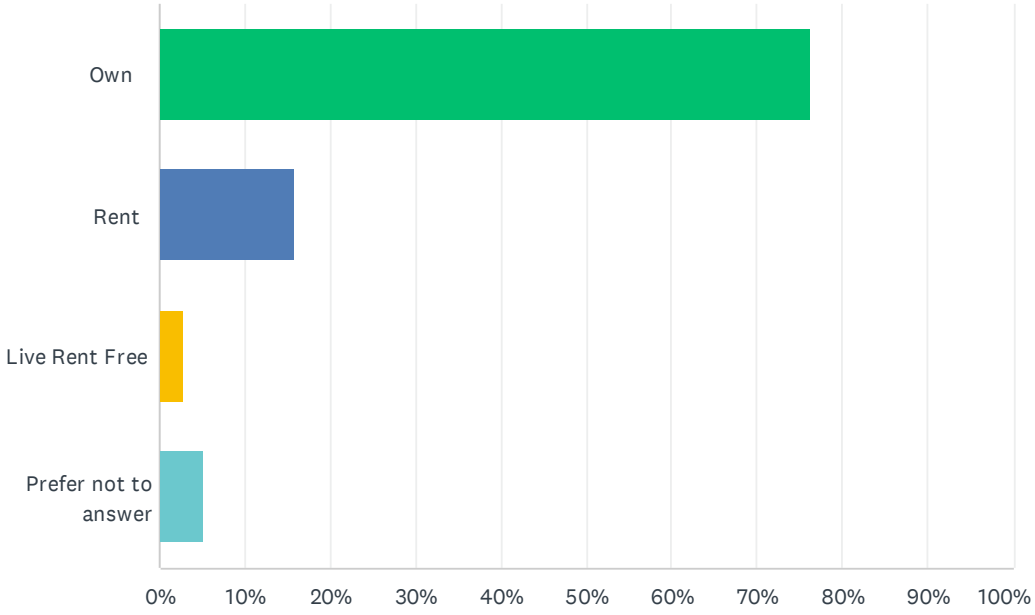
Answered: 6,778 Skipped: 139



ANSWER CHOICES	RESPONSES	
14 to 17	1.28%	87
18 to 24	3.08%	209
25 to 34	10.09%	684
35 to 49	29.54%	2,002
50 to 64	22.68%	1,537
65 or older	30.89%	2,094
Prefer not to answer	2.43%	165
TOTAL		6,778

Q14 Do you own or rent your current residence? CHECK ONLY ONE

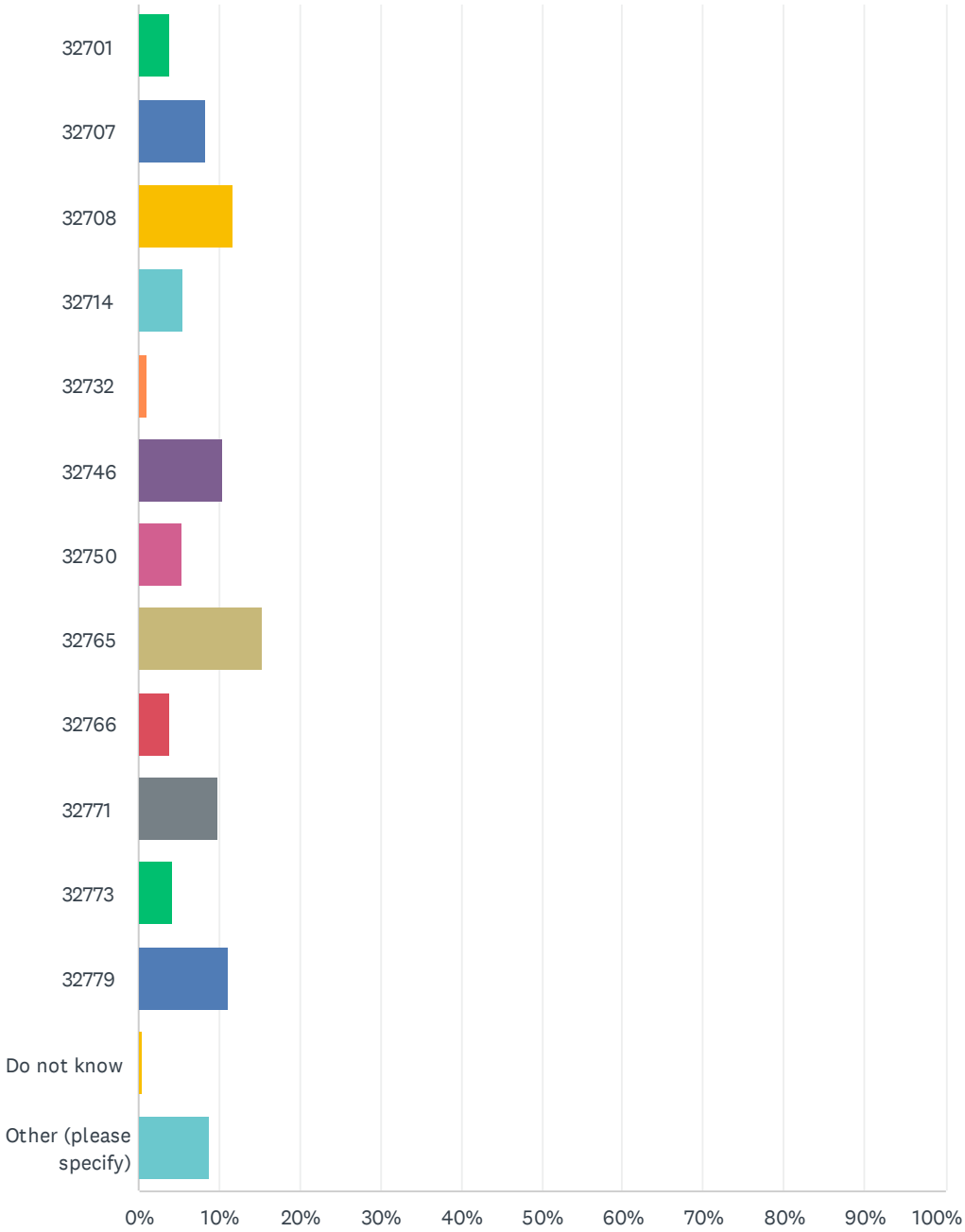
Answered: 6,765 Skipped: 152



ANSWER CHOICES	RESPONSES	
Own	76.30%	5,162
Rent	15.85%	1,072
Live Rent Free	2.72%	184
Prefer not to answer	5.13%	347
TOTAL		6,765

Q15 What is the Zip Code of your current place of residence? CHECK ONLY ONE

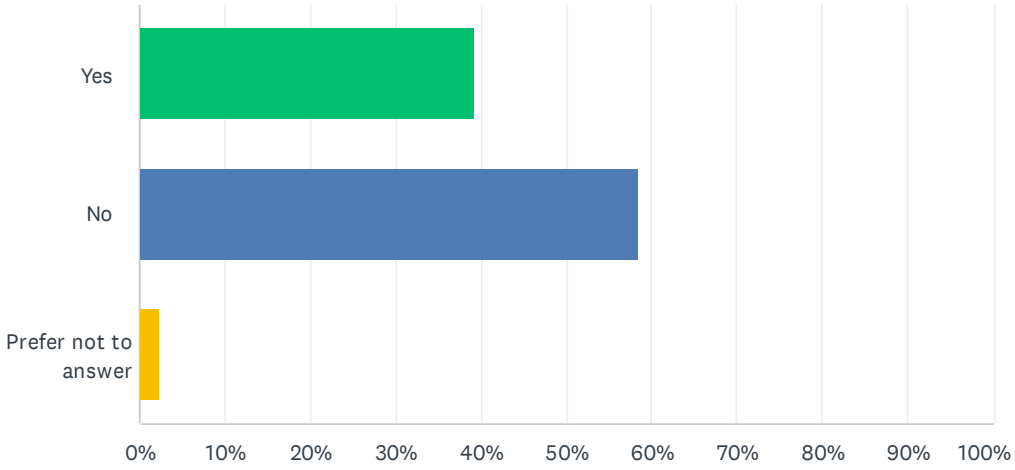
Answered: 6,772 Skipped: 145



ANSWER CHOICES	RESPONSES	
32701	3.81%	258
32707	8.40%	569
32708	11.80%	799
32714	5.55%	376
32732	1.15%	78
32746	10.44%	707
32750	5.29%	358
32765	15.27%	1,034
32766	3.93%	266
32771	9.79%	663
32773	4.28%	290
32779	11.15%	755
Do not know	0.46%	31
Other (please specify)	8.68%	588
TOTAL		6,772

Q16 Are there children under the age of 19 living in your home? CHECK ONLY ONE

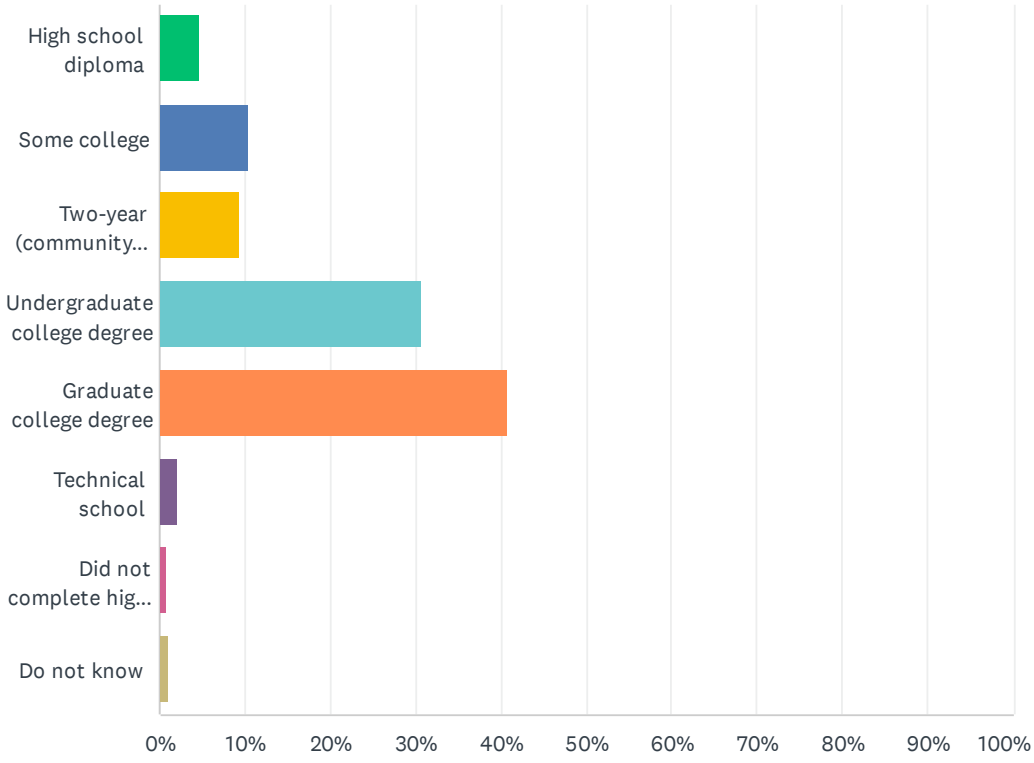
Answered: 6,753 Skipped: 164



ANSWER CHOICES	RESPONSES	
Yes	39.20%	2,647
No	58.40%	3,944
Prefer not to answer	2.40%	162
TOTAL		6,753

Q17 What is highest level of education you have attained? CHECK ONLY ONE

Answered: 6,748 Skipped: 169



ANSWER CHOICES	RESPONSES	
High school diploma	4.68%	316
Some college	10.48%	707
Two-year (community college/associate degree) college	9.43%	636
Undergraduate college degree	30.62%	2,066
Graduate college degree	40.69%	2,746
Technical school	2.09%	141
Did not complete high school	0.92%	62
Do not know	1.10%	74
TOTAL		6,748

Q18 Other comments? Please note them here.

Answered: 1,819 Skipped: 5,098

See the 87 pages of responses to this question under separate cover

6 Gallup Survey on Leisure Activities

- December 2019 Survey – Library visits outrank all other leisure activities
- Data backing up the Gallup Survey

In U.S., Library Visits Outpaced Trips to Movies in 2019

By Justin McCarthy, January 24, 2020Visiting the library remains the most common cultural activity Americans engage in, by far. The average 10.5 trips to the library U.S. adults report taking in 2019 exceeds their participation in eight other common leisure activities. Americans attend live music or theatrical events and visit national or historic parks roughly four times a year on average and visit museums and gambling casinos 2.5 times annually. Trips to amusement or theme parks (1.5) and zoos (0.9) are the least common activities among this list.

Story Highlights:

- Library most frequented by young adults, women and low-income households
- Average U.S. adult attended five movies and five live sporting events
- Age and income among key factors in frequency of activities

WASHINGTON, D.C. - Visiting the library remains the most common cultural activity Americans engage in, by far. The average 10.5 trips to the library U.S. adults report taking in 2019 exceeds their participation in eight other common leisure activities. Americans attend live music or theatrical events and visit national or historic parks roughly four times a year on average and visit museums and gambling casinos 2.5 times annually. Trips to amusement or theme parks (1.5) and zoos (0.9) are the least common activities among this list.

Table 1
Americans' Reports of Leisure and Activities
Q: *About how many times in the past year, if any, did you do each of the following?*

Dec. 2-15, 2019 GALLUP	*average*
Go to a library	10.5
Go to a movie at a movie theater	5.3
Attend a live sporting event	4.7
Attend a live music or theatrical event	3.8
Visit a national or historical park	3.7
Visit a museum	2.5
Visit a gambling casino	2.5
Go to an amusement or theme park	1.5
Visit a zoo	0.9

These data -- collected in a Dec. 2-15, 2019 Gallup poll -- are an update from a December 2001 survey. Though the overall rankings at the beginning of the millennium remain the same today, a small decrease has occurred in reported trips to the movie theater (down 1.3 average visits). Meanwhile, small increases have taken place in average reports of visiting a museum (up 0.7 average visits), attending a live music or theatrical event (up 1.1 average visits) and visits to a national or historical park (up 1.3 average visits).

Women Visit Libraries Nearly Twice as Frequently as Men. Men and woman report doing most activities at about the same rate, but there are a few key differences:

- Women report visiting the library nearly twice as frequently as men do, 13.4 to 7.5 visits.
- Men are more likely than women to visit casinos, attend sporting events, and visit national or historical parks.

Table 2
Reports of Leisure and Activities, by Gender

Dec. 2-15, 2019 GALLUP	**Men** *average*	**Women** *average*	**Difference** *(men minus women)*
Go to a library	7.5	13.4	-5.9
Go to a movie at a movie theater	5.1	5.6	-0.5
Attend a live music or theatrical event	3.7	3.8	-0.1
Visit a zoo	0.9	0.8	+0.1
Visit a museum	2.7	2.3	+0.4
Go to an amusement or theme park	1.8	1.3	+0.5
Visit a gambling casino	3.4	1.7	+1.7
Attend a live sporting event	5.7	3.7	+2.0
Visit a national or historical park	4.9	2.4	+2.5

The 30-49 Age Group Most Active Across Most Activities. Across nearly all measures, the highest average activity rates are among the 30 to 49 age group, while the lowest are among those 65 and older.

The 30 to 49 age group's higher activity may reflect their relative youth combined with mid-life financial stability. Middle-aged adults' activity is particularly above-par in terms of attending live sporting events. Their average attendance of 7.4 events during the year is more than twice that of younger adults and exceeds older adults by more than three visits.

The two exceptions to the pattern of middle-aged adults being the most active are visits to libraries and casinos. U.S. adults aged 18 to 29 visit the library much more than all older age groups – possibly reflecting college-going adults, who visit the library for studies. This youngest age group also visits casinos the most.

Table 3
Reports of Leisure and Activities, by Age Group

Dec. 2-15, 2019 GALLUP	**18-29** *average*	**30-49** *average*	**50-64** *average*	**65+** *average*
Go to a library	15.5	12.3	6.8	8.2
Go to a movie at a movie theater	6.6	6.8	4.1	3.6
Attend a live sporting event	2.8	7.4	3.9	3.7
Attend a live music or theatrical event	3.1	4.5	3.8	2.7
Visit a national or historical park	4.2	5.9	2.3	1.6
Visit a museum	2.9	2.9	2.0	1.8
Visit a gambling casino	4.4	2.9	1.8	1.4
Go to an amusement or theme park	1.8	2.6	1.0	0.5
Visit a zoo	0.7	1.5	0.6	0.4

High-Income Households Generally Do More Activities. In general, Americans in high-income households report doing activities the most, while Americans in low-income households participate the least.

- The widest gaps between high- and low-income households are in reports of attending a live sporting event, a live music or theatrical event, a museum, and going to the movie theater – all things often associated with significant ticket prices.
- Conversely, the library – which is free and offers a variety of services including WiFi – is visited most by adults in low-income households and least by adults in high-income households.
- Despite having smaller incomes, Americans in low-income households visit gambling casinos with slightly greater frequency.
- Meanwhile, the three income groups are about as likely to attend an amusement or theme park as well as the zoo.

Table 4
Reports of Leisure and Activities, by Income Group

Dec. 2-15, 2019 GALLUP	**$100,000+** *average*	**$40,000-99,999** *average*	**Less than $40,000** *average*
Go to a library	8.5	10.4	12.2
Go to a movie at a movie theater	6.3	5.7	4.4
Attend a live sporting event	7.5	3.8	3.6
Attend a live music or theatrical event	5.9	3.8	2.3
Visit a national or historical park	4.0	3.6	3.5
Visit a museum	3.5	2.8	1.5
Visit a gambling casino	2.5	2.2	3.5
Go to an amusement or theme park	2.1	1.3	1.5
Visit a zoo	0.9	0.8	1.0

In U.S., Library Visits Outpaced Trips to Movies in 2019 (gallup.com)

Certain Activities More Frequented Among Households With Children. For most measures, there are not meaningful differences between adults who report having children under the age of 18 in their households versus adults who do not have children living in their homes. But for a few activities, there are some differences between the two groups:

- Adults with children in their household attend live sporting events and go to the movies about two times or more than adults who do not have children.
- Meanwhile, adults who have no children in their household attend live music or theatrical events slightly more frequently than adults who have children in their homes.

Table 5
Reports of Leisure and Activities, by Children Under 18 in Household

Dec. 2-15, 2019 GALLUP	**Children under 18** *average*	**No children under 18** *average*
Go to a library	10.1	10.8
Go to a movie at a movie theater	6.8	4.7
Attend a live sporting event	6.7	3.7
Attend a live music or theatrical event	3.1	4.2
Visit a national or historical park	3.9	3.5
Visit a museum	2.2	2.7
Visit a gambling casino	3.9	2.0
Go to an amusement or theme park	2.0	1.3
Visit a zoo	1.5	0.6

Bottom Line. Despite the proliferation of digital-based activities over the past two decades – including digital books, podcasts, streaming entertainment services and advanced gaming – libraries have endured as a place Americans visit nearly monthly on average. Whether because they offer services like free Wi-Fi, movie rentals, or activities for children, libraries are most utilized by young adults, women and residents of low-income households.

Activities that typically cost money are visited or attended less frequently. Among this group of activities, outings to movie theaters and sports events remain the trips Americans make the most, while zoos are the least frequented.

Regional Variations in Some Activities. Americans' reports of doing activities vary by the four regions in which they live:

- Those who live in the East report having visited a museum with the greatest frequency.
- In the West, adults have the highest reports of visiting historical or national parks and gambling casinos.

Table 6
Reports of Leisure and Activities, by Region

Dec. 2-15, 2019 GALLUP	East	Midwest	South	West
	average	*average*	*average*	*average*
Go to a library	10.4	12.9	9.3	10.1
Go to a movie at a movie theater	5.3	4.9	5.4	5.6
Attend a live sporting event	4.5	4.6	5.1	4.3
Attend a live music or theatrical event	3.7	3.0	3.8	4.6
Visit a national or historical park	3.0	2.7	3.1	5.9
Visit a museum	4.0	1.7	2.0	2.5
Visit a gambling casino	1.4	3.3	1.0	5.1
Go to an amusement or theme park	1.8	0.8	1.7	1.7
Visit a zoo	0.6	1.1	0.9	0.7

Many factors determine how Americans spend their free time, and financial means is a key factor. Age, too, is a large determinant. While middle-aged Americans may tend to be the most active in these activities due to their relative youth and greater financial stability, the 30 to 49 age cohort's activeness may also reflect its household makeup. The average age of a first-time mother in the U.S. is 26 and 31 for a first-time father, according to 2016 data from the National Center for Health Statistics. So, the need to keep growing children entertained through trips to the movies or to sporting events – which are more popular among households with children – may be more common among this age group.

But one's personal interests also factor into such decisions, which may bear out in activities showing significant gender differences, such as a women's book club at the local library, or activities that are more popular or available in certain parts of the country.

Source: https://news.gallup.com/poll/284009/library-visits-outpaced-trips-movies-2019.aspx

GALLUP NEWS SERVICE

DECEMBER WAVE ONE

-- FINAL TOPLINE --

Timberline: 937008
JT: 335
Princeton Job #: 19-12-021

Jeff Jones, Lydia Saad
December 2-15, 2019

Results are based on telephone interviews conducted December 2-15, 2019 with a random sample of –1,025— adults, ages 18+, living in all 50 U.S. states and the District of Columbia. For results based on this sample of national adults, the margin of sampling error is ±4 percentage points at the 95% confidence level.

For results based on the sample of –489—national adults in Form A, the margins of sampling error is ±5 percentage points.

For results based on the sample of –536—national adults in Form B, the margins of sampling error is ±5 percentage points.

Interviews are conducted with respondents on landline telephones and cellular phones, with interviews conducted in Spanish for respondents who are primarily Spanish-speaking. Each sample of national adults includes a minimum quota of 70% cell phone respondents and 30% landline respondents, with additional minimum quotas by time zone within region. Landline and cell phone telephone numbers are selected using random digit dial methods. Gallup obtained sample for this study from Dynata. Landline respondents are chosen at random within each household on the basis of which member has the next birthday.

Samples are weighted to correct for unequal selection probability, non-response, and double coverage of landline and cell users in the two sampling frames. They are also weighted to match the national demographics of gender, age, race, Hispanic ethnicity, education, region, population density, and phone status (cell phone-only/landline only/both and cell phone mostly). Demographic weighting targets are based on the March 2018 Current Population Survey figures for the aged 18 and older U.S. population. Phone status targets are based on the January-June 2018 National Health Interview Survey. Population density targets are based on the 2010 census. All reported margins of sampling error include the computed design effects for weighting.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls. For questions about how this survey was conducted, please contact galluphelp@gallup.com**.**

Next,

22. About how many times in the past year, if any, did you do each of the following? How about -- [RANDOM ORDER]?

SUMMARY TABLE OF ACTIVITIES

2019 Dec 2-15 ***(based on "mean, including zero")***	Mean (including zero) %	Median %
Go to a library	10.5	2
Go to a movie at a movie theater	5.3	3
Attend a live sporting event	4.7	1
Attend a live music or theatrical event	3.8	2
Visit a national or historical park	3.7	1
Visit a museum	2.5	1
Visit a gambling casino	2.5	0
Go to an amusement or theme park	1.5	0
Visit a zoo	0.9	0

FULL RESULTS AND TRENDS

A. Attend a live sporting event

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	46	12	11	13	3	15	*	*4.7*	*1*
2001 Dec 6-9	44	10	9	15	4	16	*	*5.5*	*1*

B. Attend a live music or theatrical event

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	33	15	15	20	6	9	*	*3.8*	*2*
2001 Dec 6-9	39	15	16	19	3	8	*	*2.7*	*1*

Q.22 (LEISURE ACTIVITIES) CONTINUED

C. Visit a museum

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	43	20	11	16	3	6	*	*2.5*	*1*
2001 Dec 6-9	48	21	12	13	2	4	*	*1.8*	*1*

D. Visit a zoo

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	58	24	10	6	1	1	*	*0.9*	*0*
2001 Dec 6-9	66	18	10	4	1	1	*	*0.9*	*0*

E. Visit a national or historical park

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	37	18	17	15	5	8	*	*3.7*	*1*
2001 Dec 6-9	46	20	13	13	3	4	*	*2.4*	*1*

F. Go to a library

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	38	9	10	12	5	26	*	*10.5*	*2*
2001 Dec 6-9	34	5	10	12	7	31	1	*11.9*	*3*

G. Go to an amusement or theme park

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	54	19	13	10	1	4	*	*1.5*	*0*
2001 Dec 6-9	57	19	12	9	1	1	0	*1.3*	*0*

Q.22 (LEISURE ACTIVITIES) CONTINUED

H. Go to a movie at a movie theater

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	27	10	12	24	8	19	*	*5.3*	*3*
2001 Dec 6-9	26	7	11	21	9	26	*	*6.6*	*3*

I. Visit a gambling casino

	None	Once	Twice	3-5 times	6-9 times	10 or more	No opinion	*Mean*	*Median*
2019 Dec 2-15	68	11	7	7	1	5	*	*2.5*	*0*
2001 Dec 6-9	67	14	6	7	2	4	*	*1.8*	*0*

GALLUP POLL SOCIAL SURVEY
December 2019

QN22 Summary Table

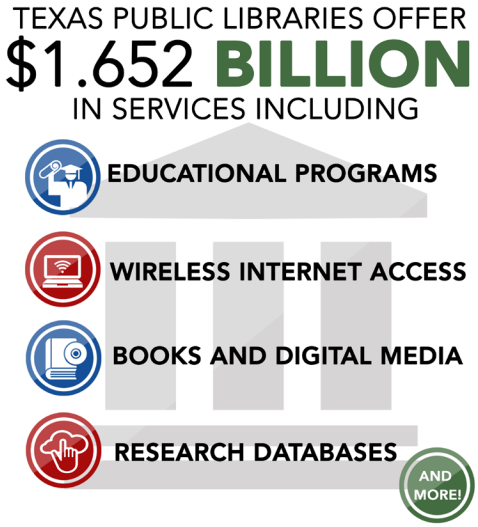
	Total	Gender		Race I		Age			Education			Party I.D.			Ideology		
	Total	Male	Female	White	Non-white	18-34	35-54	55+	College Grad	Some College	HS Grad or Less	Republican	Independent	Democrat	Conservative	Moderate	Liberal
Go to a library	10.48	7.52	13.36	10.57	10.37	14.73	11.33	7.07	14.40	11.01	6.62	7.20	9.57	15.00	6.99	12.10	14.28
Go to a movie at a movie theater	5.34	5.09	5.58	4.51	7.17	6.08	7.30	3.51	7.19	5.76	3.38	3.77	5.33	6.98	3.88	5.90	7.28
Attend a live sporting event	4.67	5.72	3.66	5.16	3.79	4.18	7.16	3.48	6.60	4.52	3.08	5.90	4.85	2.88	5.95	4.09	3.15
Attend a live music or theatrical event	3.78	3.71	3.84	4.40	2.57	3.70	4.16	3.24	6.42	3.04	1.99	2.89	3.60	4.79	2.46	3.79	5.87
Visit a national or historical park	3.66	4.95	2.42	3.96	3.06	5.69	4.02	1.95	4.44	3.57	3.07	3.54	3.78	2.60	3.20	3.58	3.51
Visit a gambling casino	2.53	3.35	1.74	2.44	2.79	4.36	2.21	1.52	1.26	2.12	3.97	3.37	2.59	1.10	3.16	1.70	2.21
Visit a museum	2.49	2.67	2.31	2.56	2.34	3.24	2.58	1.76	4.43	2.49	0.79	1.36	2.88	3.06	1.56	2.74	3.90
Go to an amusement or theme park	1.54	1.77	1.32	0.94	2.68	2.48	1.90	0.67	1.75	1.43	1.43	1.46	1.63	1.40	1.57	1.77	1.05
Visit a zoo	0.87	0.94	0.80	0.81	0.97	1.15	1.07	0.53	0.92	1.06	0.66	0.81	1.04	0.66	0.94	0.82	0.81

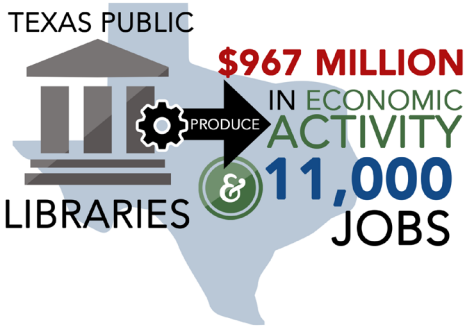
7 Return on Investment for Public Library Spending

- Most Recent Statewide Report on ROI for Texas Public Libraries – 2017

Texas Public Libraries

Economic Benefits and Return on Investment





Texas State Library and Archives Commission

This report was prepared by the

Bureau of Business Research IC² Institute
The University of Texas at Austin
January 2017

Table of Contents

Tables

Acknowledgments

The research team wishes to thank the Texas State Library and Archives Commission for their support and cooperation in completing the project. Gloria Meraz, Assistant State Librarian, provided guidance and assistance. Stacey Malek, Program Coordinator, fielded many information requests and always responded promptly and thoroughly.

Executive Summary

Public libraries in the State of Texas provide significant economic benefits for their communities. Collectively, in FY2015, Texas public libraries were found to provide $2.628 billion in benefits while costing $566 million, a return on investment of $4.64 for each dollar.

A data-intensive research design was developed to document and to quantify these economic benefits. Extensive databases from the Texas State Library and Archives Commission (TSLAC) were used in conjunction with the input-out economic modeling software, IMPLAN. Based on the IMPLAN model, which analyzed public libraries purely as business and organizational entities, libraries produced $976 million in economic activity. Further, in FY2015, more than 11,000 jobs in Texas were dependent on public library expenditures.

Another major component of the quantitative analysis examined services offered by most public libraries in Texas. Economic estimates were derived for those services as well as for wireless internet usage and volunteers at public libraries:

- Reference services;
- Educational programs;
- Volunteers
- In-library use of books, serials, and periodicals;
- Computer terminals and internet access;
- Wireless internet access;
- Electronic databases; and
- Circulation of books and digital media.

A conservative approach was utilized that provides much greater certainty that the estimated services values are minimums. The total value of these public library services was estimated conservatively at $1.652 billion. The Texas ROI of 4.64 compares favorably to results in prior studies of other states and cities, given the conservative approaches used in this analysis.

This report updates portions of an analysis performed in late 2012 for FY2011. Compared to that analysis, the value of the same services has increased by 7.8%, and the value of all public library services increased by 21.2%, primarily due to two new services being included. The ROI increased from 4.42 to 4.64, or approximately 5 percent.

Chapter I. Introduction: Scope, Methodology, Limitations

Project Goals

Libraries are collections of books and periodicals, sources of access to digital repositories, entry points to municipal, state, and federal government programs, and destination points for children and adults. They can assist in rejuvenating neighborhoods and preventing population loss in rural communities. Public libraries also have economic impacts, both short- and long-term. This study examined the economic benefits, economic impacts, and contributions to economic growth by public libraries in the State of Texas in FY2015. Both quantitative and qualitative, difficult-to-measure economic benefits were included.

Methodology

To determine the economic impacts of public libraries in Texas, a data-intensive research design was developed. Databases from the Texas State Library and Archives Commission served as the primary basis for the quantitative estimates of economic benefits.[1] TSLAC data was used in conjunction with the input-out economic modeling software, IMPLAN. IMPLAN is commonly used by economists and is widely accepted as one of three software modeling programs for impact analyses (the others are REMI and RIMS II). The IMPLAN software, as well as the accompanying multipliers, social accounting matrices, and trade flows, allow for economic analysis of public libraries as well as other related service industries. The software used in this report is unique to the economic activity in the State of Texas.[2] Identified expenditures and jobs from public libraries, obtained from the TSLAC databases, served as the primary inputs to IMPLAN.

Another major component of the quantitative analysis examined major services offered by most public libraries in Texas: circulation of books and other media; computers and internet; educational programs; electronic databases; and reference services. This analysis required combining statewide totals for each of the services from the TSLAC database, with values for each service, e.g. each educational program, a reference inquiry, or a book checked out. Prior studies of libraries in other

1 The annual survey of public libraries by the Texas State Library and Archives Commission is conducted and checked by experienced staff. Other data sources, and any cautions, are noted in the respective service function.

2 IMPLAN utilizes a 500+ industry matrix, allowing for detailed industry analysis. For this report, such detail was unnecessary and results were described in terms of direct, indirect, and induced impacts on output, employment, and wages. More details, including a table of definitions, are provided in Chapter II of this report.

jurisdictions were reviewed as part of the valuation process. Economic estimates also were generated for the benefits from volunteers working at public libraries, in-library use of books, serials, and periodicals, and wireless internet access.

As part of the overall methodology, the research team conducted a review of recent return-on-investment studies of public libraries. This review documented the range of methodologies used previously, showed variation in library services' values, and provided a context for the quantitative results from the IMPLAN modeling and the overall ROI figure in Texas. Summaries of each recent study appear in Appendix A.

Throughout this report, a conservative approach has been utilized in valuing library services. For some services, we have adapted approaches previously used in other studies, although not necessarily the valuations of the services. Often there is room for judgment about valuation, and when that has occurred, we have chosen the lower figures because of the uncertainty within the estimation process. By using the lower, more conservative values, this analysis is able to report with certainty that public libraries in Texas provide a minimum aggregate value to their patrons and communities. Any errors in the estimates are much more likely to be understatements, rather than overstatements.

Report Overview and Organization

Chapter II provides key financial characteristics of Texas public libraries and then documents the direct and indirect economic and employment impacts statewide of public library expenditures.

Chapter III details major library services, offers alternative approaches to valuation of these services, and estimates statewide values for each.

Chapter IV summarizes the economic impacts from library expenditures and services and then compares the return-on-investment to those in recent impact studies and then to earlier reports.

Three appendices appear after the main report:

- Summaries of Four Recent Library Impact Studies
- References and Citations
- Performing Organization and Project Staff

Chapter II. Key Financial Data of Texas Public Libraries

This chapter describes key characteristics of Texas' approximately 550 public libraries. In a later section of this chapter, data and information are presented that assesses the economic contributions of library spending on the State of Texas based on expenditures and employment in fiscal year 2015.

Library Data

The Texas State Library and Archives Commission provided operating and capital expenditure data for public libraries across Texas in their Annual Reports for Local Fiscal Year 2015. Economic impacts were estimated by examining operating expenditures, capital expenditures, employee salaries and benefits, and construction expenditures.

The TSLAC database for FY2015 included more than 100 variables. These data and information are collected through an annual survey.[3] The variables used to evaluate economic impacts included:

- Wages and benefits
- Size of collection
- Other operating expenses including replacement furniture and equipment
- Expenditures on wages and benefits, collection, and miscellaneous
- Indirect costs
- Total operating expenses
- Capital outlay
- Total full-time equivalents of paid library staff
- Local fiscal year beginning date

Data was provided for each library's fiscal year, which began October 1 for 71% of Texas public libraries, January 1 for 20% of libraries, with the other 9% having different start months. The monthly timing difference for the fiscal years was inconsequential for the economic impact study.

Capital Outlay

Of the 548 public libraries, 127 reported capital outlays totaling $62 million in FY2015. These outlays may include building sites, new buildings, additions, or renovations. These outlays may also include purchases of furniture, equipment,

3 The report form and variable descriptions may be found in either word or pdf formats under the heading *2015 Annual Report Blank Worksheet* at: https://www.tsl.texas.gov/ld/pubs/arsma/index.html#LibPAs.

books, vehicles, computer systems, and other one-time extraordinary purchases noted in the reporting form.[4]

Operating Expenditures

Operating expenditures in FY2015 totalled $501.4 million. These expenditures are comprised of labor costs, library collections (e.g., books, periodicals, etc.), and other supplies and services purchased for library operations. Wages and benefits comprised 67.8% of operating expenditures, demonstrating the largely labor-intensive nature of library operations. Operating expenditures are less volatile than capital expenditures.

Employment, Wages, and Benefits

Library full-time equivalent (FTE) employment totaled 6,861 in FY2015. This number was converted to a headcount based on micro-data for the input-output model, yielding 8,232 full- and part-time employees. These workers earned $340.1 million in FY2015, of which 27.4% was paid for employee benefits. Wages totaled $247 million.

Collection

Library collections are reported in three formats: print, electronic, and other (e.g., microforms and audiovisuals). Libraries make ongoing purchases of collection items, and these ongoing purchases amounted to $63.0 million in operating expenditures in FY2015, with $36.2 million directed towards print materials, $16.6 million for electronic materials and $10.1 million for other collection items.

Other Operating Expenditures

Other operating expenditures reference the non-labor, non-collection library operations. These include supplies, software licenses, networks, Internets, and contracted personnel (i.e., facilities maintenance, consultants, auditors, etc.). Other operating expenditures totaled $92.9 million in FY2015.

Library Revenue

Revenue for a private enterprise derives from the sale of goods and services, in which value was added to raw materials or intermediate inputs and resold with a margin. Public enterprises, like libraries, receive "income" through taxes, fees, and grants. Given the nonprofit status of libraries, revenues largely match expenses. For the public libraries in Texas, operating revenues totaled nearly $508.3 million, and capital revenues totaled $56.1 million, for a total of $564.4 million in FY2015. Libraries have various revenue conduits, ranging from federal, state, and local sources, foundation and corporate grants, and fines and donations. While funding sources are varied, more than $0.95 of every $1.00 in library revenue (operating and capital) is from a local source, (i.e., from cities, counties, school districts, local donations etc.).

4 A variety of available data and longitudinal comparisons are available at: https://www.tsl.texas.gov/ld/pubs/pls/index.html

Statewide Economic Impacts from Library Expenditures

Library expenditures represent the employment of individuals in local communities and purchases of goods and services, primarily from private industry vendors. The locale of these purchases varies by library, with the composition of the local economy often dictating what may or may not be sourced locally. Companies supplying products to libraries, in turn, employ and purchase from other companies, thus creating a multiplier effect. To calculate the multiplier effects and overall economic impacts, the research team used the input-output economic modeling tool IMPLAN. The IMPLAN software incorporates data (expenditures, jobs, etc.) and publically available secondary data on labor, wages, and output. The main input data were (1)

The $563.4 million in direct library operating and capital expenditures in FY2015 ($501.4 million in operating expenditures and $62.0 million in capital expenditures as described earlier in this chapter); and (2) A total of 8,232 full- and part-time employees (6,861 full-time equivalent (FTE)).[5] This direct spending in the State of Texas multiplies through other industries in the supply chain, ranging from real estate and wholesale trade, to food services and health care. IMPLAN captures this economic activity by using economic multipliers, social accounting matrices, and trade flow data unique to the State of Texas. In other words, statewide impacts were estimated using the Texas model of IMPLAN. The model then produced results expressed in terms of direct, indirect, and induced impacts on output, employment, and wages.[6]

As shown in table 2.1 library expenditures in FY2015 led to approximately $976 million in total economic activity in the State of Texas. Total employment, full- and part-time, due to public library expenditures was 11,192.

These economic benefits were derived from the upstream economic linkages for library operations and construction, as well as from household spending on goods and services in the community. In other words, based on libraries' operating and capital expenditures, spending by vendors and households generated an additional $453 million in economic impact and 2,960 jobs in Texas.

Overall, based on the $566 million in direct expenditures, economic benefits as calculated by IMPLAN were $976 million, for an ROI of 1.72—for every dollar expended, there is $1.72 in statewide economic activity.

---

5 An additional $2.63 million was added for the TSLAC share of electronic databases, as described further in chapter III.

6 Operating expenditures for leakage estimates were calculated by the IMPLAN model. Operating expenditures were categorized as Other Information Services in the model. Estimated construction expenditures were assigned as Nonresidential Building in the IMPLAN model.

Definitions

Gross Domestic Product (GDP): A measure of economic activity, GDP is the total value added by resident producers of final goods and services.

Gross Output (Output): The total value of production is gross output. Unlike GDP, gross output includes intermediate goods and services.

Value Added: The contribution of an industry or region to total GDP, value added equals gross output, net of intermediate input costs.

Leakage: Refers to spending that occurs outside the region of study.

Direct Impact: The measured economic activity (expenditures, employment, wages) recorded by the organization, in this case, public libraries.

Indirect Impact: Captures the additional activity related to libraries' business supply chains.

Induced Impact: Captures the impact of household spending driven off salaries earned by library employees, as well as indirect employees.

Multiplier Effect: Includes the direct, indirect, and induced impacts related to libraries spending to demonstrate the rippling effect of economic activity related to expenditures, employment, and wages.

TABLE 2.1. STATEWIDE ECONOMIC IMPACT OF LIBRARY EXPENDITURES, FY2015

Impact	Employment	Labor Income (In Millions)	Value Added (In Millions)	Output (In Millions)
Direct Effect	8,232	$371	$402	$566
Indirect Effect	580	$32	$52	$92
Induced Effect	2,380	$113	$199	$351
Total Effect	**11,192**	**$516**	**$653**	**$976**

Chapter III. Market Values of Library Services

Introduction

The economic impact of a library is comprised of two distinct types of impacts. The first type is the same as any other organization or business, regardless of its service, goal, or intent. An organization or business that hires individuals and purchases supplies will have a beneficial economic impact on its local community. As described at the end of Chapter II, total statewide economic activity from library salaries, operating expenditures, capital expenditures, and associated purchases by supplier companies and household spending in Texas surpassed $976 million in FY2015.

The second major category of economic impacts/economic benefits is the value of services provided by the public libraries. This chapter enumerates eight types of services, adopts methodologies for capturing benefits, and derives an aggregate monetary value for each. Note that there are a variety of services that some public libraries perform that are not included. For example, some libraries serve as a locale for services provided by outside organizations, for instance private tutors who conduct sessions at a library and business organizations who counsel clients in rooms within a library. Some libraries rent meeting room and auditorium space. These are missing from the calculations.

Reference Services

One of the traditional services provided by libraries is a reference service in which patrons can ask librarians specific questions, and obtain reliable answers in a relatively short period of time. Unlike some other library services, there is no market equivalent for public libraries' reference services.[7] Another problem in valuing reference services is determining the value of an accurate or inaccurate answer. How is it possible to calculate the economic effect of accurate answers for community residents or the costs to a community of having inaccurate answers? And how does one compare the value of accurate answers to different questions—are all questions of the same importance?

7 While there are many alternatives to library reference services that are free to use, these online mechanisms have a limited history and provide answers of undependable accuracy. See for example: www.google.com, www.yahoo.com, www.ipl.org, answers.yahoo.com, www.ask.com, www.wolframalpha.com, www.answers.com, and www.wikipedia.org. There have been bidding schemes operating at such sites as www.justanswer.com and www.mturk.com .

Without a reasonable market-based option, one method to value a library's reference service is by determining the amount of time librarians spend on patrons' questions and then factoring in compensation for librarians. This method has its own difficulties.[8] In this approach the first step is to characterize reference questions. One major study found that 70.9% of reference questions take between 1-5 minutes to answer, 19.1% take between 6-10 minutes to answer, 7.9% of reference questions take more than 11 minutes to answer, and 2.1% of reference questions take an unknown time to answer.[9]

As with valuing other services in this report, we adopt conservative assumptions whenever such steps are needed. For the large proportion of reference questions, those that take between 1 and 5 minutes to answer, we will use an average of three minutes. For reference questions requiring 6-10 minutes to answer, we will use an average of 8 minutes. For those questions taking ***more*** than 11 minutes to answer, we will use 11 minutes. And for the small percentage of reference questions requiring an unknown amount of time, we will use the weighted average of the prior three categories (11, 8, 3), rounded down to 7 minutes.[10]

In 2015, Texas public libraries reported that they answered 14,628,965 reference questions. [11]

If we use the percentages from the detailed 1998 study of Spencer and Dorsey, 70.9% would be questions that take between 1 and 5 minutes, or 10,371,936 reference questions. Multiplying that number of reference questions by three minutes and then dividing by sixty minutes per hour, equates to 518,597 hours.

Similar computations were made for the other categories of reference questions, which yielded the following:

> 19.1% were reference questions that require between 6 and 10 minutes, or 2,794,132 reference questions; multiplying by eight minutes and then dividing by sixty minutes per hour, gives 372,551 hours.

---

8 The problem with an equation based on this premise is that a more experienced librarian capable of answering fifteen questions in an hour will be valued less than a less experienced librarian only capable of answering five questions in an hour. In all cases, simple "directional" questions and "how to" questions about fines, library cards and so forth, are specifically excluded from being counted as reference questions.

9 Spencer, John S. & Dorsey, Luene (1998) Assessing time spent on reference questions at an urban university library. The Journal of Academic Librarianship, 24(4), pp. 290-294.

10 Presumably these times include that time in which library patrons must communicate their inquiry and reference librarians must understand the inquiry/question before being able to research and answer the inquiry.

11 This is an adjusted number that reflects additional (632,479) reference questions from the Pecos and Dallas Public Libraries. Nearly all of those questions were for the Dallas Public Library. The basic procedure was to use the per capita ratio of reference questions to population served for Dallas in 2011 (0.4887) and then use that same ratio for the 2015 population served.

7.9% were reference questions that require 11 minutes or more, or 1,155,688 reference questions; multiplying that number of reference questions by eleven minutes and then dividing by sixty minutes per hour, gives 211,876 hours.

2.1% or 307,208 were of unknown duration and assumed to require an average of 7 minutes to answer; multiplying by seven minutes and then dividing by sixty minutes per hour, yields 35,841 hours.

These different categories of reference questions combine to 1,138,865 hours in 2015. A gross estimate from the 2015 survey is that a library employee on average has an hourly cost (salary and benefits) of $23.83, based on 2080 hours per year. Multiplying the 1,138,865 hours by the hourly rate of $23.83 yields a total value of $27.1 million ($27,141,069) for reference services.

By this method, the average value of a reference question statewide would be approximately $1.86 ($27,141,069 divided by 14,628,965 reference questions).

This value is extremely low compared to other libraries and online library calculators. The current ALA online value calculator estimates the value to be $7.00 per question, [12] while the state of Maine estimates the value at $15.00. [13] In the recent reports, the value from Salt Lake County was $7.24, Santa Clara County was $16.72, and Toronto was the equivalent of $14.11. Because of the extremely low figure derived by the hourly approach ($1.86), in this instance we believe there is ample justification for using a different value. However, rather than choosing one of the three alternative values, the hourly value will be increased by 50% to $2.79. Using that value per reference question yields a total value of $40,814,812.

Every other possible per unit value would have generated totals in excess of $105 million, and nearly $245 million if the Santa Clara County value had been used. Even those numbers may be low estimates as the per unit values from Salt Lake County, Santa Clara County, and Toronto were from several years ago.

12 See http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library_calculator

13 http://www.maine.gov/msl/services/calculator.htm

Programs

Programs provided at Texas public libraries are conservatively valued at slightly below $49 million ($48,795,845). Of the 548 public libraries responding to the FY2015 TSLAC annual report, only 11 did not conduct training programs or workshops to their patrons. In 2014-15, public libraries provided 251,258 workshops, training, or other educational programs to more than 6 million library patrons. A majority of these programs, 54%, were provided for children. The programs for children were also more widely attended--71% percent of those who attended any program were children and parents at children's programs.

Programs for young children are focused on instilling a love of books, promoting reading, and frequently involve story-telling or craft projects. Programs for young adults and adults are more varied. While there are book discussion clubs and hobby-oriented programs, many adult programs are devoted to improving an individual's literacy, computer literacy, job skills, or job prospects. And many are oriented to businesses. In the 2012 Bureau of Business Research survey of public libraries, more than 40% of the library directors who responded to a specific question said their libraries provided programs and workshops specifically focused on business-related skills such as:

- preparing/updating a resume and searching for a job;
- developing marketing literature;
- researching issues related to their business; and
- business counseling.

Ideally, we would be able to derive an estimate by reviewing similar types of programs offered by other organizations. Unfortunately, similar types of programs are relatively uncommon. Perhaps the most similar are provided by YMCA and YWCA-type organizations. However, these services are generally provided to members who pay both membership fees and program fees for multiple events, making it difficult to estimate the value of a single-session workshop. Another potential comparison involves museums, as museums often have traveling exhibits and events with a supplemental fee for the exhibit. These fees can be quite expensive but such exhibits rarely are oriented to children per se. The best available estimates for the values of

Texas public library programs, however, are probably those provided by libraries elsewhere. After reviewing such estimates and the online library calculators, a conservative estimate for each type of library program is shown in the third column of Table 3.1. below.

TABLE 3.1. STATEWIDE VALUE OF LIBRARY PROGRAMS IN FY2015

	Number of Patrons	Fee/Value Per Patron	Total Value
Children's Programs	4,315,355	$6.50	$28,049,807
Young Adult Programs	427,754	$9.50*	$ 4,063,663
Adult Programs	1,334,590	$12.50	$16,682,375
Total	**6,077,699**		**$48,795,845**

** This value was determined by being halfway between that of an adult fee and a child fee.*

The most recent library studies and calculators have estimated program values ranging from $7 to $42 per patron, per event.[14] Using this methodology the average fee per patron would be $8.03, which is similar to the lower amounts in that range of $7 to $42 in other library reports.

A final note on the value of programs—More than 1,881,000 individuals were trained in the use of electronic resources in 2015. No value has been calculated for this training for two reasons. First, there is likely to be some overlap between this number and the attendance at programs. To include a separate value would effectively be valuing the training twice. Second, it is unknown to what extent there is overlap. Simple correlation values of the training numbers with program attendance by young adults, adults, and total are low, suggesting the overlap may not be substantial. Yet, it is unclear how much overlap there is, and in such an instance, we provide no estimate of a value in keeping with the overall conservative approach used throughout this analysis.

14 The Salt Lake County library study of July 2013 estimated values of $9 for adults and $7 for young adults and children. Santa Clara County (California) estimated adult and young adult programs at $16 and children's programs at $14. In Toronto's late 2013 report, adult and senior program values were estimated at the US equivalent of $14.11, while the program values for children and teens at the US equivalent of $42.34.

Volunteers

Volunteers in libraries provided their communities with $20 million worth of services ($20,159,826) in FY2015. The vast majority of public libraries in Texas supplement their full- and part-time staffs with volunteers to provide services. In FY2015, more than 1.1 million hours (1,128,138 hours) were donated to Texas' public libraries, providing the volunteers with professional experience and the community with additional services.[15]

Information from the 2015 statewide survey illustrates the importance of volunteer staff for Texas' libraries. All but a handful (15) of libraries utilize volunteers: 20 libraries had the equivalent of 5 or more full-time employees, three libraries had the equivalent of more than 20 full-time employees, and a fourth library had more than 68,000 volunteer hours, the equivalent of 32 full-time employees donated in a year. Ten public libraries are run exclusively by volunteers.

The Financial Accounting Standards Board (FASB) specifies that the value of volunteer services be included in financial statements, grant proposals and annual reports based on the fair market value of those services.[16] To comply with that standard, Independent Sector, a nonprofit support organization, creates an annual report on the average value of volunteer hours by state.[17] In 2015, Independent Sector identified the average value of volunteers for the State of Texas to be $25.11 per hour.[18] (Please see Table 3.2.)

A gross estimate from the 2015 TSLAC survey is that a public library employee on average has an hourly cost (salary and benefits) of $23.83, based on 2080 hours per year. This is a composite of all employees: those who have master's degrees or otherwise hold the title of "Librarian;" administrators, coordinators, conservators, instructors, information technology specialists, clerical staff, and shelving assistants.

Based on the TSLAC Annual Report information, approximately 32% of employees at Texas' public libraries have master's degrees from ALA accredited programs or otherwise hold the title of "Librarian." Other employees include administrators, coordinators, conservators, instructors, information technology specialists, clerical staff, shelving assistants, and many other specialists in larger libraries.[19]

---

15 This total was based on the TSLAC survey results and supplemented with 1476 hours, which was the number from 2011 for 15 libraries in 2015 that had missing data for volunteers. This adjustment comprised about 0.13 percent, or slightly more than one-tenth of one percent.

16 FASB Standard No. 116 & 117

17 http://www.independentsector.org/volunteer_time

18 In the past, a unit of Points of Light, HandsOn Network, provided estimates for volunteers specified by job title rather than by state. In 2011 there were three job titles for volunteers in libraries, with hourly compensation ranging from $12.43 per hour to $28.86 per hour. Such information no longer appears to be available.

19 http://www.ala.org/educationcareers/careers/paths/listsupportstaff

TABLE 3.2. POTENTIAL VALUES OF VOLUNTEER HOURS IN FY2015

Independent Sector (2015)	
National average for volunteers	$23.56
Texas average for volunteers	$25.11
Average Salaries/Benefits for FY2015 TSLAC Survey—Average Hourly Rate	**$23.83**

Note: All amounts are salaries and fringe benefits.

Because detailed information about the types of services provided and donated by volunteers in Texas' public libraries are unavailable, one must make assumptions. Volunteers provide a range of services from unskilled labor to specialized assistance, and volunteers have all types of skills and experiences. However, we do not know what proportions of volunteers possess and contribute different skills. If one makes the assumption that volunteers mirror the paid employees, then an hourly rate of $23.83 for volunteers is appropriate. It seems doubtful, however, that the volunteers' duties and responsibilities match those of full-time employees; therefore, a discount of 25% is being applied to the average hourly rate of $23.83, yielding a volunteer hourly rate of $17.87. That is certainly higher than what many library volunteers could command but also lower than what volunteers would receive for operating an entire library and substantially lower than the Texas average hourly compensation for volunteers.

With 1.12 million hours of volunteer services provided to public libraries, with each hour valued at slightly less than $18, volunteers contributed services to their communities valued at approximately $20.16 million.

In-Library Use of Materials

Library patrons not only use computers, electronic databases, wi-fi, and check out books and electronic media in different formats, they read periodicals and other materials inside a library. Identifying the extent of this activity and placing a value on it statewide is challenging. Yet an attempt must be made as value is being provided to users.

Data have been collected regularly about in-library use of materials on the annual, nationwide Public Library Data Surveys (PLDS), even though fewer libraries report data for that metric than for any other library metric. For instance, in the 2013 PLDS (2012 results) there were 473 reporting libraries for in-library use of materials, whereas 1,579 libraries reported data for programs, 1590 libraries reported interlibrary loans, 1,647 libraries reported annual circulation, and 1,262 libraries reported print circulation.

The normal procedure for compiling in-library usage data is "observational counts." Instructions to public libraries by the Ontario Ministry responsible for libraries are as follows:

> *In your typical week survey,…Report the number of materials used inside the library and not checked out. Count any items removed from their usual location by staff or library users. Include reference materials, circulating materials, magazines, newspapers and all other materials used in the library.*
>
> - *Count a vertical file, pamphlet file, multi-media kit or language learning kit as a single item - do not count each as a separate element;*
> - *Do not count audio-visual items unless they were used at viewing/listening stations available in the branch;*
> - *Do not include items returned from an outside circulation*[20]

A number of academic articles have identified limitations of the observational counts.[21] Yet if the alternative is to omit any value for an activity that is known to occur regularly, then it seems preferable to provide at least some estimate of value.

Because the annual TSLAC surveys do not request data on in-library usage, a circuitous method was devised to provide a gross estimate. The first approach reviewed the annual PLDS survey reports and compared the mean and medians for

20 Ontario Ministry of Culture, Tourism, and Sport, based on personal correspondence with Kimberly Silk, September 2016.

21 See Richard E. Rubin, "Measuring the In-house Use of Materials in Public Libraries," ***Public Libraries*** 25 (1986) and Rebecca D. Richardson, "The State of In-Library Materials Use at the Cresson Public Library: A Case Study," Current Studies in in Librarianship; Fall2011, Vol. 31 Issue 1.

In-Library Usage and Print Circulation. For 2013 the numbers were:

	Mean	**Median**
In Library	271,500	25,891
Print Circulation	706,751	157,581
Percentage	38.4%	16.4%

For 2011, only the means were calculated in the PLDS data:

	Mean
In Library	309,926
Print Circulation	822,005
Percentage	37.7%

The Toronto Library Report also provided In Library data and Print Circulation data:

In Library	7,141,558
Print Circulation	19,714,304
Percentage	36.2%

The three percentages (mean for the 2013 PLDS, mean for the 2011 PLDS, and mean for Toronto) are quite similar: 38.4%, 37.7%, and 36.2%. Because of the conservative approach, the lowest of the three will be selected: 36.2%. From the latest TSLAC annual survey, print circulation for public libraries was 103,553,860. In-library usage therefore would be a maximum of 37,279,390 (103,553,860 X .362).

Researchers performing the analysis of the Toronto Library utilized a range of unit values: a value without any discount (a high value in their view); a value that was discounted 80% from the high value, and a midpoint value. For In-Library Use, the high value was the same as that for adult circulation (the equivalent of $19.75) and the discounted value was the equivalent of $3.95.

Again, in this report the most conservative choice will be made. Consequently, the 2015 print book circulation value for Texas will first be discounted by 80%. Based on the 2015 print book circulation value of $8.78, the after discount value would be: $1.76 ($8.78 X .20). Then because of potential data issues with determining in-library usage, this value will be further discounted by half. Multiplying the discounted value of $0.88 with the in-library use figure of 37,279,390 generates an estimated value for this activity of $32,805,863.

Computer Terminals and Internet Access

Computer terminals with internet access are a significant economic resource provided by Texas public libraries. Library directors in a statewide survey said patrons used the internet for a wide variety of purposes that ranged from education to employment to basic needs. [22] Some of the online activities specifically mentioned were to:

- perform homework and research for classes from grade school to college;
- take continuing education courses, online training, and webinars;
- train and test for job certifications and licenses;
- search, and apply, for jobs;
- apply for unemployment benefits and social assistance;
- apply for disaster aid as well as find family and friends during and after natural disasters;
- work short-term, paid, online jobs, such as on Mechanical Turk™;
- develop and operate online businesses by placing and receiving orders;
- research price comparisons;
- market new products;
- use online banking; and
- file taxes.

Multiple libraries stressed the value to their patrons of being able to secure, maintain, and update their certifications and licenses by using library internet access. Without internet access, directors said these patrons would lose their jobs. Other library directors reported that without internet access, some patrons would lose their businesses--numerous library directors mentioned that patrons were running small businesses entirely via internet at their library. These businesses ranged from an independent real estate inspector, to a trader in used car parts, to various direct selling members, and other types of businesses.

Directors pointed out that even those patrons who have home internet access often use the library internet access because of its greater bandwidth and faster service. And as one library director commented, not all patrons have the option of having personalized internet access at their residence. Ranchers and others in rural areas in particular have difficulty obtaining reliable and reasonably priced internet at their residences. The same can be said for many disadvantaged individuals in urban areas—while broadband is theoretically available to them in their neighborhood, in practical terms they often lack the resources for an up-to-date computer or broadband access in their residence.

---

22 More than 62% of the library directors who responded to the 2012 survey by the Bureau of Business Research said that internet access was "extremely beneficial," while a further 20% said it was "quite beneficial" for their patrons. Furthermore, 56% of library directors statewide reported that internet access was the single most important resource provided by their libraries.

Economic Benefits

Long-term economic benefits to library patrons and the community at large from internet access are difficult to estimate precisely. One approach would be to solicit information from patrons about the value of internet access to them. Because that would entail a large user survey, this report used a different method: examining the cost of obtaining internet access from an alternate source. [23]

While public libraries provide internet access free of charge to their patrons, there are a few companies from which the resource can be purchased.[24] The standard rate set by these for-profit companies is $18-$21 per hour, using a rented computer. (Commercial options do not exist in many smaller communities, or even in some areas of larger metropolitan areas.) Nonetheless, for the purpose of deriving an estimate of the monetary value of internet access via a public library, the commercial rate is the best option.

An elaborate procedure was used in the 2012 report and will not be repeated here. (Please refer to that report for a complete description of the procedure.) Basically, from that procedure we calculated that the average session length was 1.16 hours. Because some libraries did not report a maximum length, we believe the figure of 1.16 hours is very conservative.

Second, we applied the hourly rate of $15 per hour and then computed the average internet session at $17.40 (1.16 hours multiplied by the same hourly rate that was used four years ago, $15.00. [25]

Third, we calculated the statewide estimate, utilizing the total number of internet access sessions, information that was obtained from the 2015 Public Library Annual Report. In calendar year 2014, there were 16,876,575 sessions on internet-accessible computer terminals in public libraries in Texas.[26] At an average value of $17.40 per session, public library computer terminals saved users an estimated $293,652,405 in 2015.

This figure is conservative. As noted earlier, some libraries do not report a maximum length so the average session length in reality is likely to be greater than 1.16

23 Salt Lake County's report asked about willingness to pay for computer access, and the value was estimated at approximately $80 annually per user. Slightly over one-fourth of patrons in Salt Lake County reported that they used computer terminals at one of the public libraries.

24 The largest business to provide this resource is FedEx Office, which only provides it in a small portion of their store fronts. Many other studies have used this commercial comparison.

25 There is mixed information about the values of computer terminals in other studies. The current ALA calculator is $12/hour. The Toronto and Santa Clara County reports use values less than $10/hour. Salt Lake County uses $18/hour. Because the majority of values are less than the commercial rate of $21/hour, using the prior hourly rate in the 2012 report seems appropriate. A lower rate does not seem reasonable given distance and access issues in Texas compared to library systems in more urban areas.

26 This number was derived after including an estimate in 2014 for the Dallas Public Library, based on their reported usage in prior TSLAC reports and a review of computer usage in seven other large Texas public library systems.

hours. This report also cannot reasonably estimate the values of internet access at public libraries in areas of Texas (largely in the Panhandle, West Texas, and parts of South Texas) without commercial alternatives within a ninety-mile radius. In these situations, users would have a significant commute when they wanted to access the internet, and the value to patrons of having internet access locally would be much higher than $15/hour. Thus the value of internet access statewide is almost certainly underestimated, rather than overestimated.

Wireless Internet Access

Wireless internet is offered by nearly all public libraries in Texas and is a service widely used and considered extremely important by librarians. While somewhat dated, in the 2012 statewide survey of public library directors conducted by the Bureau of Business Research, wireless internet access was listed as the single most important resource provided to their patrons by 13% of the directors.[27]

Library patrons use wireless internet connections for the same purposes as they use the computer terminals within a public library, but wireless provides several advantages. First, it allows patrons to use their own portable computers and digital devices. This enables users to save documents on their own computers as well as keep materials without having to print a hardcopy version. Second, users generally have unrestricted access via wireless, as there is no competition with other users for a computer terminal or limits on the time they have access. Third, users can access a library's wireless service after normal library hours, if they are willing to work within a small distance beyond the walls of their library building. Many examples were cited by library directors of users parking near the library after hours to access wireless (wi-fi) signals.

Although nearly all public libraries offer wi-fi, not all libraries methodically track the number of digital devices accessing their wireless networks. In the 2015 TSLAC annual survey the number of wi-fi sessions was documented at 15,853,077. However, this was the number from only about 73% of public libraries. In other words, more than 140 public libraries did not report data on wi-fi sessions. To provide a more accurate estimate, two different methods were employed. First, a simple proportional approach assumed that if 15.8 million sessions occurred from 73% of the libraries, then if the additional 27% of public libraries had reported, a total of 21.6 million sessions would have occurred. A second approach assumed that the number of wi-fi sessions would be directly proportional to the number of available computers in libraries.[28] In this approach we eliminated those libraries that did not collect wi-fi data and then examined what percentage of the total number of available computers existed, compared to the total number before excluding any of the libraries. That percentage was 76.1%. Because the two methods provided reasonably close percentages (73% and 76.1%) and because the correlation was relatively strong, it is reasonable to assume that actual wi-fi usage is considerably higher than the number provided by librarians in the TSLAC survey. The more conservative percentage of 76.1% would indicate that the actual number of wi-fi sessions in 2015 was 20,831,901 (15,853,077 / 0.761).

---

27 An additional 52% of library directors said that internet access in general was the most important resource they provided.

28 A correlation of .75 exists between number of computer terminals and number of wi-fi sessions, a relatively strong relationship. This provides justification for the assumption and also indicates that libraries which do not collect wi-fi data are quite similar to those that do.

Economic Benefits of Wireless Internet Access

As with the earlier section which examined the value of computer terminals and internet access within libraries, we could estimate the monetary value of wireless access by looking at alternative providers. Costs of wireless internet, however, vary from provider to provider and generally involve long-term contracts or are subject to indirect costs, or both. Because of the variety and complexity for alternative providers, in this instance, a more direct approach is appropriate. The Santa Clara County unit value for wi-fi in 2012 was $6 and in Toronto it was the equivalent of $4.70. In the 2012 report we used a unit value of $5, and that seems reasonable for 2015 as well. The unit value is for each use, regardless of the length of that use.

Therefore, the aggregate value of wireless internet access provided by Texas public libraries in 2015 is more than $104 million annually ($104,159,505). This estimate is a straightforward multiplication of $5.00 per use applied to 20,831,901 uses.

Electronic Databases

Increasingly, electronic databases are being used by patrons of Texas public libraries. In FY2015, more than 500 public libraries offered a minimum of TexShare's 62 databases, a co-operative program of TSLAC and local public libraries. Under the TexShare program, patrons have access to databases in the following categories:

Books and Literature—12
Science and Technology—12
Homework—11
General Information—9
Business—7
Genealogy and History—6
Health and Medicine—6
Spanish Language—3
Career Development, Language Learning, Newspapers—1 each

A more detailed description of the databases available for the time period is available at: https://www.tsl.texas.gov/texshare/databasecontractlistfy2015.html

The scope and size of the databases is more apparent in the number of full-text titles available through the TexShare resources:

Newspapers and Newswires	11,080,696
Full text Journals	5,087,966
Primary Source Documents	310,082
EBSCO eBooks	28,281
Reference Books	5,718
Genealogy Documents	2.7 billion

Accessing this wealth of information has become increasingly common. In the FY2015 period, patrons at public libraries performed more than 75 million searches, up dramatically from 9.7 million searches four years earlier.[29] As another perspective, there are more than 200,000 TexShare searches conducted every day by public library patrons, based on vendor data provided to TSLAC.

Because of this large number, it is reasonable to ask if there may be overlap between the number of database searches and other public library services: reference questions, computer usage, and wi-fi sessions. Undoubtedly there is some overlap; the issue is whether it is significant or minimal.

On reference questions, there appears not to be overlap to a great extent. According to a researcher at the TSLAC, *"…Reference transactions are generally face-to-face interactions between library staff and patrons, and the libraries track those numbers and then report them to us."* In many cases, electronic databases are used by patrons

29 There were approximately 10% fewer sessions, roughly 68 million, in contrast to the number of searches, 75 million. The number of searches will be the unit of analysis in this description.

in lieu of asking reference librarians specific queries, as well as for conducting searches and research that patrons know cannot be performed by librarians.

Yet, there is certainly some overlap with computer usage and wi-fi usage by patrons. At present there is no good method for determining the extent of this overlap. And for this reason, again, we will adopt a conservative approach and conservative assumptions to valuing this service.

In the other recent reports about library impacts, a fairly consistent value has been used for database searches:

ALA Calculator:	$19.95
Toronto (US equivalent):	$23.52
Salt Lake County:	$20.00
Santa Clara County (CA):	$37.40[30]

There are multiple reasons, however, for adopting a lower value than those used in other studies. First, there is some overlap of this service with computer usage and wi-fi. How much is unknown, and there is no current way of identifying the extent. Second, TSLAC acknowledges that there is some uncertainty about the data, given the available tracking technologies of the vendors. Also there are some known cases of particular library systems showing dramatically large increases in monthly search numbers. Finally, per capita search metrics for Texas appear much higher than other jurisdictions. While the content of the database packages may be quite different, this is another possible reason to err on the conservative side.

For these reasons, a very conservative value per search of $2 was selected. Based on this per search unit value, the total value of database searches in public libraries was $150,167,176 in FY2015.[31]

30 Different classes of database searches were valued differently, ranging from $5 each for foreign language and indexes/directories, to $25 each for most categories, and at $200 each for company/business information. Dividing the total value of all searches by the total number of searches yielded $37.40 for the mean.

31 According to TSLAC, if each public library would have purchased the same package of 62 databases, the total cost would have been at least 10 times more than that in the absence of the group discount.

Circulation of Materials

To derive the value of circulation materials provided by Texas public libraries requires several different data sources, information about circulation materials (books, DVDs, e-books etc.) and a few reasonable assumptions. First, books will be considered, then other materials, and finally total values will be computed for circulation transactions by public library patrons.

For books, in the prior study, a complicated, multi-step process was performed. The first step was to determine the proportion of new book purchases, by category. Then one category, Higher-Education, Professional, and Scholarly, of books was deleted as that category is rarely purchased by public libraries. The re-computed proportions for several categories were then compared against actual circulation proportions for public libraries in Texas. The comparisons showed some differences, but within reasonable approximations. Then we determined the average cost of a new hardcover book in each category. We then multiplied that average cost by the proportion of new book purchases by proportion of new book purchases by category to determine the average new book cost. Then that price was severely discounted (80%) for a variety of reasons, to arrive at a per book circulation value of $8.63.

In retrospect, that complicated process seems unnecessary, and for FY2015, a less complicated approach will be used. As can be seen in Table 3.3 below, a variety of values have been identified in recent analyses. (Blanks indicate no value was assigned to that category.)

TABLE 3.3. POTENTIAL VALUES OF BOOKS, BASED ON OTHER SOURCES

	ALA Calculator	State of Maine	State of Minnesota	Santa Clara County*	Salt Lake County	City of Toronto**
	2015	**2014**	**2010**	**FY 2012**	**2013**	**2013**
Adult Books	17	18	7.48	9.5	8.61	7.04
Young Adult Books	12		6.48			6.10
Children's Books	17	10	6.48	8.75	4.81	6.10

**Average of Low/High*
***Discounted 50%*

Because of the variation, one approach is to exclude the highest and lowest values for adult books and children's books, and then take the mean or average. That would provide the resulting values in Table 3.4.

TABLE 3.4. DERIVED VALUES OF BOOKS, BASED ON OTHER SOURCES

	ALA Calculator	State of ME	State of MN	Santa Clara Co.*	Salt Lake County	City of Toronto**	Average
	2015	**2014**	**2010**	**FY 2012**	**2013**	**2013**	
Adult Books	17		7.48	9.5	8.61		$10.65
Young Adult Books	12		6.48			6.10	$8.19
Children's Books		10	6.48	8.75		6.10	$7.83

**Average of Low/High*

***Discounted 50%*

Because the 2015 TSLAC survey does not differentiate between young adult books and adult books, a blended rate of $9.42 will be used.

There were a total of slightly more than 103 million book items in physical format circulated in FY2015. Of that number, approximately 40% were items marked as children's and 60% as adult or young adult. Therefore, the value of book circulation transactions:

Children	41,486,566 X $7.83 = $324,839,812
Adult/Young Adult	62,067,294 X $9.42 = $584,673,909
Total Book Circulation Value:	$909,513,721

Non-book, that is digital fomat, circulation values follow a somewhat different approach. Non-book items can be divided into two main categories:

Video and audio items: 51.6%,
E-books: 48.4%.[32]

DVDs are available as a single purchase item from one company (RedBox) at many locations in Texas and could be rented for $1.50 per day in FY2015. Alternative sources for multiple rentals are NetFlix, Amazon, and several smaller services. A per unit value of $1.50 will be used for both DVDs and CDs.

32 Because circulation data does not distinguish between audio and video items, these percentages were based on the classification of items in the collections. In terms of actual circulation, it is reasonable to assume that e-books comprise a higher proportion than video and audio formats.

E-books are a different matter. Other library valuation research present values that vary considerably both in absolute terms and in relation to the value of a book in physical format. And there are choices available online from free e-books up to and including e-books of new releases at $14.99. While many cost below $10, there is also data that a higher per-unit value should be used for e-books: the average per volume price for more than 232,000 e-books in 2013 was $27.83.[33] Without choosing a large sample of genres, authors, etc. and deriving a blended per unit value, any choice of value will be somewhat subjective. For this report, we see no reason to value e-books differently than a hardcopy format.

Based on circulation data from the 2015 public library survey, the statewide calculations for digital formats are:

Video and audio items: 5,424,113 X $1.50 = $8,136,170
E-books: 5,091,087 X $8.78 = $44,699,744

And the value for all circulation transactions are:

Total Value of Book Circulation Transactions: $909,513,721
Total Value of Digital Circulation Transactions: $52,835,914
Total Value of Circulation Transactions in FY2015: $962,349,635

33 See Catherine Barr and Constance Harbison, "Book Title Output and Average Prices: 2009-2013," in Library and Book Trade Almanac (formerly The Bowker Annual), 2014, 59th Edition, Information Today, Inc.: Medford, NJ., page 473.

Chapter IV. Summary of Quantifiable Economic Impacts

Public libraries in the State of Texas generate significant economic impacts. In FY2015, more than 11,000 jobs in Texas were dependent on public library expenditures. When analyzed as business and organizational entities, public libraries produced $976 million in local economic activity. In addition, the total value of eight public library services was conservatively estimated at $1.652 billion.

TABLE 4.1. STATEWIDE VALUES OF PUBLIC LIBRARY SERVICES, FY2015

Service	Value
Reference Services	$40,814,812
Programs	$48,795,845
Volunteers	$20,159,826
In-Library Use	$32,805,863
Computer Terminals	$293,652,405
Wireless Internet Access	$104,159,505
Electronic Databases	$150,167,176
Circulation (All Formats)	$962,349,635
Total All Services	**$1,652,905,067**

Total economic benefits from Texas' public libraries in FY2015, therefore, were approximately $2.629 billion.

Spending by public libraries in FY2015 totaled $566.0 million: $504.0 million in operating expenditures and $62.0 million in capital expenditures.[34]

Overall, with economic benefits of $2.629 billion and expenditures of $566 million, there was an ROI of 4.64—for every dollar, there was $4.64 in statewide economic activity.

Table 4.2 shows the financial benefit ratio (return on investment) for recent prior studies of library impacts. Comparisons of these ratios across different jurisdictions must be conducted with caution and, in some instances, may be inappropriate due to different types of services and other localized conditions. Nonetheless, the Texas ratio appears in line with the ratios evident elsewhere.

34 The operating expenditure total includes $2.65 million from TSLAC for its share of the TexShare electronic databases.

TABLE 4.2. RETURN ON INVESTMENT IN RECENT REPORTS

Jurisdiction	Year	Return on the Dollar
STATES		
Minnesota	FY2010	$4.62
COUNTIES		
Salt Lake County, UT	2012	$5.47-$6.07
Santa Clara County, CA	2012	$2.50-$5.17
Toledo Lucas County, OH	2015	$3.87
CITIES		
Toronto	2012	$4.63
Texas	**FY2015**	**$4.64**

Table 4.3 on the next page shows the respective ROI figures as reported in the earlier 2012 report. Again, Texas appears in line with many other jurisdictions.

TABLE 4.3. RETURN ON INVESTMENT IN SELECTED EARLY REPORTS

Jurisdiction	Return on the Dollar
STATES	
Colorado	$4.99
Florida	$8.32
Indiana	$4.76
South Carolina	$4.48
Texas – Statewide 2011	$4.42
Wisconsin	$4.06
CITIES	
Charlotte	$4.61
Southwestern Ohio	$3.81

Note: Summary statistics were unavailable for Philadelphia and Seattle.

Compared to the earlier analysis performed in late 2012 for FY2011, the ROI increased by 5%, with most of that due to inclusion of new service values. The ROI

would have increased by a greater percentage but total economic impact is quite dependent on the mixture of spending. Compared to FY2011, overall spending increased in FY2015, although there were fewer capital expenditures and more operating expenditures.[35]

The impact of Texas public libraries is still underestimated. Public libraries serve their communities by making information and learning readily accessible to any individuals who choose to enter a library's doors or, in recent years, use a library's online portal. The individuals who use the libraries directly benefit by gaining knowledge and ideas. Even those who choose not to use their local public library benefit by being part of a more educated community. Substantial research has concluded that economic growth and leadership is highly correlated with highly educated communities. Public libraries offer every person an opportunity to improve his or her education and every business an opportunity to improve their productivity. Public libraries are an overlooked factor in economic leadership among states.

35 Capital expenditures, for instance, construction outlays, have high multipliers and greater "ripples" in terms of economic impacts.

Appendices

Appendix A: Summaries of Recent Impact Studies

Appendix B: Bibliography and References

Appendix C: Performing Organization and Project Staff

Appendix A: Summaries of Recent Impact Studies

States

Minnesota

Counties

Santa Clara County, California

Salt Lake County, Utah

Toledo Lucas County, Ohio

Cities

Toronto, Ontario

State of Minnesota

Title

***Minnesota Public Libraries' Return On Investment*, University of Minnesota Duluth, Labovitz School of Business and Economics, December 2011**

Goals

This research was designed to answer several questions: (a) what are the levels of support among the state's residents for public library services; (b) how do state residents want public library services to be financed if changes were required to maintain or expand services; (3) what economic impacts are due to public libraries in the state; and (4) what is the cost-benefit ratio/ROI of public libraries.

Methodologies

Two surveys were conducted: a statewide, general population survey of 804 households and a more detailed survey of 557 public library users throughout the state. The user survey was the main method used in determining the value of public library services. Rather than estimating benefits for specific library services, researchers relied on contingent valuation, asking patrons directly how much they would pay or exchange for all library services, that is a bundle of library services rather than individual library services. Contingent valuation is essentially a "willingness-to-pay" approach or the "willingness-to-accept" approach, which generates estimates for how much a patron say they would pay to obtain a service, or how much they would accept to give up the service.

Another component of the research was determining the economic benefits of public libraries with the economic model IMPLAN. Indirect/induced employment, indirect/induced labor income, and indirect/induced economic impacts were computed based on public library employment, labor income, and spending/expenditures as well as the economic profile of the State of Minnesota.

Results

Based on the user survey, researchers estimated that the average household would be willing and able to donate between $31.7 and $38.3 dollars annually, resulting in a total donation of $65.4 to $79.0 million annually, based on the number of Minnesota households. The researchers stated the estimated amounts should be considered "snapshots," as demand conditions could change frequently.

The combined totals for capital expenditures and operational expenditures in 2010 dollars were computed to be:

Employment	4,202
Payroll	$296,329,531
Output	$431,793,024

ROI Ratio(s)

Based on the willingness to pay estimates, the economic model amounts, and Minnesota's population, the economic contribution per capita totalled $169.32. With local and county tax support per capita at $36.67, the annual return per dollar of public tax support equalled $4.62. That is the generally used ratio throughout the report, although in several sections, a lower ratio of $2.50 was cited.

Other Findings:

The general population survey indicated that Minnesotans felt that public libraries are a very important part of a community, and that public library funding should remain the same or be increased. If additional resources were needed for public libraries to continue, there were divergent views about user fees, taxes and/or reducing services. The most frequently favored option was to raise taxes, not user fees and/or reduce services. However, the next most favored option was to increase user fees and/or reduce services and not alter taxes. Findings varied by the pattern of respondent and household use of public libraries, and background items such as household income, respondent gender, age, and geographic location.

Other pertinent details from the general population survey:

There was a higher level of household usage of public libraries among those in the Twin Cities area (83%) than elsewhere in Minnesota (72%).

There was no statistically significant difference in reported household usage of public libraries by men or women, although gender differences showed up in other patterns of usage.

There was no statistically significant difference between men and women on the question of whether public library support should be increased, remain the same, or be reduced.

In all income categories, to increase support, the highest percentage of respondents favored using taxes and oppose user fees or reduced service.

Those individuals with more education were more likely to report household use of a public library in the past year: 62% among those with some college or less education, 83% among those who have graduated from a technical or other college, and 92% among those with post-graduate work. There was no statistically significant difference between these education groups in their feeling of the importance of having a public library in every community as all groups felt this was important.

There was no statistically significant difference among age groups in the importance they expressed for there being a public library in every community, or on the question about whether public library support should be increased, remain

the same, or be reduced.

Researchers also identified the social return on investment (SROI) from Minnesota public libraries without attempting to measure the educational programs, literacy benefits, the expertise of the library staff, the library facility as a community gathering place, the "halo" spending by library users at establishments close to the library, and the value of a library's enhancement to neighborhood real estate and community partnerships.

Santa Clara County, California

Title

***Santa Clara County Library District, 2013 Return on Investment Report*, Berk Consulting, Seattle Washington.**

Goals

The Santa Clara County Library District (SCCLD), which has 8 libraries and a bookmobile, serves more than 400,000 residents in the unincorporated portions of Santa Clara County and the cities of:

- Campbell
- Cupertino
- Gilroy
- Los Altos
- Los Altos Hills
- Milpitas
- Monte Sereno
- Morgan Hill
- Saratoga

Besides quantifying the SCCLD's benefits to the extent possible, the report sought to describe SCCLD's unquantified benefits. An extensive portion of this report is devoted to the library district's activities in:

Enhancing early literacy and youth education;
Promoting lifelong learning and personal growth;
Building and bridging diverse communities;
Providing access to information and technology for all; and
Supporting personal recreation and quality of life.

Examples are provided of the district's impacts on health and wellness, adult education, job and employment services, literacy, and being anchors of community life for county residents. Santa Clara County has an extensive variety of economic, social, linguistic, and ethnic backgrounds, with over 100 languages and dialects are spoken by county residents according to the report. The

Library District has tailored its collections and programming to reflect the highest used languages and actively collects in 19 languages.

Methodologies

Five major categories of activities and services were examined in fiscal year 2011-2012:

- Circulation
- Programs
- Reference Services

- Space Usage
- Technology Usage (in-library terminals, wireless, and databases)

The quantitative methodology was standard: (a) identify the quantity of a service; (b) assign a value, usually both a high and a low value, based on the going rate to acquire a comparable good on the open market; and (c) for all circulation categories, apply a discount rate to the low value only. Unquantified benefits were identified primarily through interviews.

Results

Circulation values dominated the total benefits. The low and high calculations for each major category were as follows:

	Low Estimate	High Estimate
Circulation	$50,995,113	$105,631,651
Programs	$1,621,340	$4,161,784
Reference Services	$2,945,808	$8,849,375
Space Usage	$77,350	$324,050
Computers	$1,936,901	$4,439,814
Databases	$24,848,725	$47,706,559

ROI Ratio(s)

Total estimated benefits were computed at approximately $83 million for a low estimate and $171 million for the high estimate. Total expenditures were slightly over $33 million for cost-benefit ratios of $2.50 and $5.17.

City of Toronto, Ontario

Title

***So Much More: The Economic Impact of the Toronto Public Library on the City of Toronto*, University of Toronto, Martin Prosperity Institute, December 2013**

Goals

Determine the ROI and total economic impact of the Toronto Public Library based on calculations for tangible benefits and spending. According to the report, direct tangible benefits are those that have an identifiable beneficiary while indirect tangible benefits are those from the re-spending of dollars within the community.

At the time of the study, Toronto's population was nearly 2.8 million. The library had 98 branches located across the City of Toronto, and most Toronto residents lived within a two-kilometer radius of a branch.

Based on a 2012 survey cited in the report, the Toronto Public Library is heavily utilized:

Over 2 million residents are members;
72% of respondents used the library in the past year;
44% of the adult population uses the library once a month or more; and
Nearly half of the adults taking a child to a library branch do so two or three times each month.

Methodologies

The study analysed the five main categories of Toronto Public Library programs and services:

- Collection Use – books, eTitles, CDs, DVDs, magazines, newspapers, and a museum and arts pass providing discounts;
- Programs – for children, teens, adults, and seniors to support literacy, culture, workforce development, and lifelong learning;
- Reference & Database Services – to support study and business development;
- Technology – access to computer technology and the Internet to support career development, personal research, and lifelong learning; and
- Space – used for reading, personal study, meeting, and collaboration.

Values for each service were based on the local comparative market price for a similar service, according to researchers. And in the case of circulation materials and materials used in the library, the actual cost of the item was discounted by 80% to account for the differences between borrowing and owning a book or other media item. (That left a residual value of 20% per item.) Whenever possible and appropriate, local Toronto prices were used to determine the value.

Two approaches were used that were different than those in other jurisdictions. First, all spending data were from a single year (2012), except for capital expenditures. For renovations, the average annual spending from 2007–2012 was used. Second, to calculate the indirect benefit, researchers applied a multiplier range of 1.4 to 2.0 instead of performing calculations with a specific economic model. To justify this approach, researchers provided information about multipliers in other recent economic impact studies evaluating comparable services. They also state that the 1.4 to 2.0 multiplier range is consistent with national and provincial multipliers used by Statistics Canada.

This report also introduced new measures to estimate the value of library space and materials delivery.

Results

Three estimates were computed for the values of services: low, mid-point, and high. Those amounts were: CAD $352.5m, CAD $680.8m, and CAD $1,009.1m. [36]

Three amounts also were generated for total economic impacts: Low – CAD $ 612.1m, mid-point – CAD $1,000.6m, and high – CAD $1,389.1m

In general, the mid-point numbers were cited most frequently.

ROI Ratio(s)

Low, mid-point, and high ROIs were 244%, 463%, and 681%.

Other Findings

Values for individual services were:

	Low	Mid-Point	High
Collection Use	$183.7	$512.1	$840.4
Programs		26.4	
Reference & Database Services		78.8	
Technology Access		25.9	
Meeting & Study Space		37.7	

Total economic impact for each household within the City of Toronto: $955 CAD;

Total economic impact for each of Toronto's residents: $358 CAD.

Based on the $1 billion in direct tangible benefits (the High estimate) provided by the Toronto Public Library, each of the two million library members received as much as $502 in total direct benefits.

36 In millions of Canadian dollars (CAD$). The exchange rate as of 12/31/2013 was 1 USD=1.0628 Canadian or CAD$= 0.94095 USD.

Materials delivery was valued as a service at approximately $15 million. Library members may place a circulating item on hold and have that item delivered to a branch chosen by the resident for pick-up. The value per "hold" was deemed equivalent to the cost of single fare for the Toronto Transit Commission at that time.

The meeting and study space amount of $37.7 million was based on a series of assumptions and calculations. To calculate the economic benefit of meeting space, bookings of meeting rooms at branches were multiplied by the Library's commercial rental rate, which was deemed comparable to the Toronto District School Board space rates of $12.20 to $50 per hour. That value was relatively small at $1.4 million. The bulk of meeting space value ($36.2 million) was derived by multiplying the 9 million annual visitors by a conservative value for work space in the Toronto.

Salt Lake County, Utah

Title

***A Return on Investment Study of Salt Lake County Library Services*, Javaid Lal, University of Utah, July 2013**

Goals

Due to the financial contraction of 2008, all Salt Lake County departments were asked to justify their expenditures in conjunction with a countywide tax increase. This led library officials to support a study to quantify the monetary value of the library services and inform the public and other stakeholders about their return on investment (ROI). In addition to providing measurable results, the study obtained information from library users about their priorities.

At the time of the report, the Salt Lake County Library (SLCoLibrary) operated 18 community libraries and three reading rooms in 17 cities serving a population in excess of 825,000. During 2012, more than 4.5 million people visited SLCoLibrary branches and over 10.1 million connected virtually via the library website. More than 16 million items were checked out, which made SLCoLibrary the 12th largest circulating library in North America with 22.2 books per capita circulation. Salt Lake City and Murray City, with a combined population of more than 235,000, have their own libraries.

Methodologies

To calculate ROI for Salt Lake County Library Services (SLCoLibrary), a mixed-methods, multi-phase approach was employed, In the first phase of the study, an online survey was fielded to collect data from library patrons. The survey used the contingent valuation method by asking specific questions about patrons' library use and their willingness to pay for similar services in the absence of a library. Questions were asked about discrete services and not a bundle of services.

In the second phase of the study, 2012 library use statistics from SLCoLibrary were utilized in calculating monetary equivalents of the services provided by the library.

Actual usage and willingness to pay were determined for:

- Help from Library Staff
- Magazine borrowing
- Newspaper borrowing
- Book borrowing (hardcover, softcover, children's, E-book, audiobook)
- Computers
- Electronic resources
    - Electronic News & Magazines Subscription

Professional Journals Subscriptions
Business & Investment Resources Subscription
Consumer Reports Subscription
Genealogy And Family History Search

DVDs, CDs

Children's and adult's programs

In the third phase, indirect economic impact analysis was performed with the Rims II Regional Input-Output Modeling System. This analysis generated the economic ripple impacts on the local economy from library expenditures for employee wages, book, supplies, and construction activities.

The final phase aggregated the benefits from services and the direct and indirect economic impacts, and compared them to taxpayer costs. Unusually, capital/ construction expenditures were considered one-time benefits and separated from other benefits, although not excluded from the ROI.

Results

ROI Ratio(s)

Salt Lake County taxpayers' combined return on investment was calculated at between $5.47 and $6.07 for every $1.00 invested in library services. This was comprised of between $3.09 and $3.69 in direct benefits, $1.57 in indirect benefits, and $0.81 in one-time benefits for every $1.00 invested by the Salt Lake County taxpayers.

Overall, SLCoLibrary provided goods and services worth $121 million in measurable direct benefits to the County residents.

Other Findings:

An average SLCoLibrary cardholder saved $4,581 annually by not having to purchase similar material in the marketplace.

When asked how much they would be willing to pay, the average cardholder specified $487.96.

There were 608 responses to the user/patron survey. More than 100 questions were asked. The first section addressed inclusion criteria, in person and online visitation purposes, and visitation frequency. The second section contained approximately 60 questions pertaining to current usage and willingness to pay for alternative services as well as questions about satisfaction with library services. The third section collected demographic information for statistical purposes.

The majority of survey respondents were satisfied (24.36%) or very satisfied (71.88%) with library services—a combined satisfaction rate of 96.24%.

Toledo Lucas County, Ohio

Title

***Return on Investment Analysis of Toledo Lucas County Public Library*, Fleeter & Associates, Columbus, Ohio, April 2016**

Goals

The Toledo Lucas County Public Library has a collection of nearly 2.2 million print, video, audio, and digital materials, ranking it as the fifth largest in the State of Ohio. There are nearly 300,000 cardholders from the Lucas County population of approximately 442,000. There is a downtown main library and 18 branch libraries.

Methodologies

Library services were broken into the following categories:

A. Circulation of Physical Materials--books, periodicals, dvds, and cds

B. Circulation of Digital Materials--eBooks, downloadable audio books, digital magazines, & streamed movies

C. Computer & Technology Services--loaning of laptops and tablet devices, patron use of library computers, wireless provision, and computer training

D. Reference Services--non-circulating books and periodicals, provision of answers to reference questions, and electronic database usage

E. Other Library Services, Programming and Outreach--meeting room use, children's, young adult, and adult & family programs, bookmobiles, genealogy, job & employment and personal finance workshops,

Values for each service were based on comparative market prices for similar services. For instance, based on information about the cost of computer training in northwest Ohio, a value of $25 per hour per patron was assigned to the computer training offered by the library. The number of patron hours of training was then multiplied by $25.

For physical books, this study assigned an average discount of the purchase price of 50%. In other words, the assignment of the net value when a patron borrowed a book assumed that the net value of the use of the book equaled its acquisition cost less a resale value of 50%. The formula for computing the value of books borrowed equaled:

Number of Books Borrowed X (Acquisition Cost– 50% Discount) = Total Economic Benefit of Book Circulation

To calculate the indirect benefit, researchers applied a multiplier of 1.41 instead of performing calculations with a specific economic model. This specific multiplier was selected because it was the "Household Consumption" economic multiplier for Ohio,

as computed by the Bureau of Economic Analysis, U.S. Department of Commerce.

Unlike all other prior ROI library impact reports, this multiplier was applied quite differently: to multiply to the value of library services and not to multiply library expenditures.

Results

ROI Ratio(s):

When compared to the library's expenditures of $37.1 million in 2015, the total Return on Investment was determined to be 3.87.

Other Findings:

Values and proportions of values for categories of services were:

Library Service	Estimated Value	Share of Value
Physical Circulation	$40,949,070	40.30%
Electronic Circulation	$9,125,812	9.00%
Computer & Technology Services	$19,770,644	19.40%
Reference Services	$27,894,521	27.40%
Library Programs & Other Services	$3,937,933	3.90%

Appendix B: Bibliography and References

American Library Association. ***Library Value Calculator.*** http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library_calculator

American Library Association. ***List of Support Staff Positions in Libraries.*** http://www.ala.org/educationcareers/careers/paths/listsupportstaff.

American Library Association. Public Library Data Surveys.

http://www.ala.org/pla/publications/plds

Barr, Catherine Barr & Harbison, Constance, "Book Title Output and Average Prices: 2009-2013," in ***Library and Book Trade Almanac*** (formerly The Bowker Annual), 2014, 59th Edition, Information Today, Inc.: Medford, NJ., page 473.

Financial Accounting Standards Board of the Financial Accounting Foundation. 1993, June. ***Statement of Financial Accounting Standards No. 116 & 117.***

Independent Sector. ***The Value of Volunteer Time in 2015***. http://www.independentsector.org/volunteer_time

Personal correspondence with Kimberly Silk, September 28, 2016, about instructions from Ontario Ministry of Tourism, Culture and Sport for compiling In-Library Materials Use based on "observational counts."

Personal correspondence with Stacey Malek, September 20, 2016.

Points of Light. ***Volunteer Calculator***.

http://www.pointsoflight.org/tools/volunteercalculator

Richardson, Rebecca D., "The State of In-Library Materials Use at the Cresson Public Library: A Case Study," ***Current Studies in in Librarianship***; Fall2011, Vol. 31 Issue 1.

Rubin, Richard E., "Measuring the In-house Use of Materials in Public Libraries," ***Public Libraries*** 25 (1986).

Spencer, John S. & Dorsey, Luene (1998) Assessing Time Spent on Reference Questions at an Urban University Library. ***The Journal of Academic Librarianship***, 24(4), pp. 290-294.

State of Maine, Maine State Library. ***Library Value Use Calculator***

http://www.maine.gov/msl/services/calculator.htm

Texas State Library and Archives Commission. 2012. ***Texas Public Libraries: Economic Benefits and Return on Investment.*** University of Texas at Austin, Austin, TX.

https://ic2.utexas.edu/tpl/

Appendix C: Performing Organization and Project Staff

The Bureau of Business Research, IC² Institute, The University of Texas at Austin

The Bureau of Business Research (BBR) was established in 1926 to provide small business owners and policymakers with applied economic research and data to strengthen the state's business environment. Throughout its history, the Bureau and its work has been characterized by objectivity and independence. The IC² Institute was established in 1977 with the vision that science and technology are resources for economic development and enterprise growth. In addition to the BBR, the Institute oversees several programs that include the Austin Technology Incubator and the Global Commercialization Group. The Bureau's prolific publications history includes numerous economic assessments and program evaluations.

Project Staff

Dr. James Jarrett, Senior Research Scientist, Bureau of Business Research, IC² Institute, The University of Texas at Austin, served as the principal investigator. Brian Lewandowski, Associate Director, Business Research Division, Leeds School of Business, University of Colorado Boulder, performed the economic modelling. The research was conducted in calendar year 2016.


TEXAS STATE LIBRARY AND ARCHIVES
COMMISSION

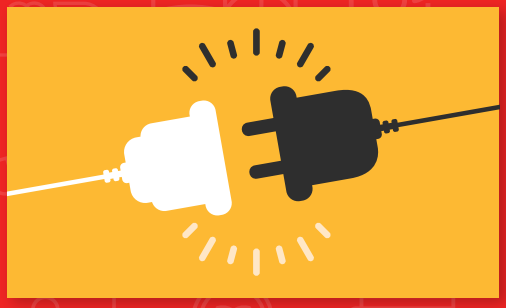

INSTITUTE of
Museum and Library
SERVICES

8 State of America's Libraries Special Report

- Excerpts on Federal Funding for Public Libraries
- How Americans were Reading
- Position Paper on Needed Changes to the E-Book Marketplace

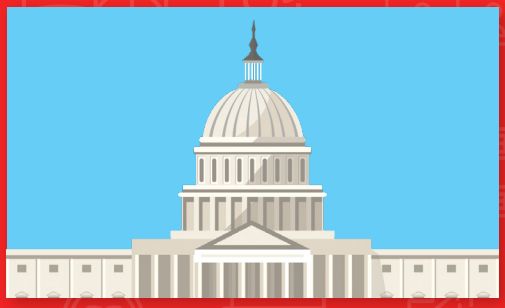
State OF AMERICA'S LIBRARIES

SPECIAL REPORT: PANDEMIC YEAR TWO



BROADBAND

TOP 10 MOST CHALLENGED BOOKS



LEGISLATIVE UPDATES

AND MORE!

ALA American Library Association

FEDERAL FUNDING, LEGISLATION, AND ADVOCACY

Libraries in 2021 saw unprecedented levels of federal funding, from pandemic recovery legislation to annual appropriations, beginning with the $1.9 trillion American Rescue Plan Act (ARPA). The largest spending bill ever approved by Congress, ARPA included $200 million for the Institute of Museum and Library Services (IMLS), the only source of federal funding dedicated to America's libraries. Of the $200 million for IMLS, 89% ($178 million) was allocated for state library administrative agencies.

In addition to the one-time influx of funding through ARPA, libraries won increases in annual congressional appropriations for Fiscal Year 2021. IMLS received an additional $5 million, a record eighth consecutive increase for the agency. Innovative Approaches to Literacy (IAL), a federal program administered by the Department of Education supporting school libraries and non-profit literacy organizations, also saw a $1 million increase above FY 2020 appropriations.

American Library Association advocates worked to ensure libraries would be eligible for additional funding in any broadband provisions negotiated in proposed infrastructure spending throughout 2021. The Infrastructure Investment and Jobs Act, signed into law in November 2021, included unparalleled funding for digital equity programs. In addition to providing an additional $43 billion for broadband deployment, the legislation included $2.75 billion in new investments in digital inclusion through the Digital Equity Act. The legislation would support libraries and other community organizations to help individuals develop the skills and the confidence to put that internet connection

to use. ALA weighed in early to influence the design of the forthcoming grant programs and will provide guidance for libraries of all kinds to access the funds in 2022.

Libraries may be eligible to receive funding for library infrastructure through another program established through ARPA. The Coronavirus Capital Projects Fund provides $10 billion in available funding for eligible states, territories, and tribal communities to ensure individuals' access to high quality broadband, the implementation of broadband infrastructure improvements, and the enhancement of the overall quality of education, work, and telehealth as a direct response to the ongoing public health emergency. Funds will be allocated from the U.S. Department of the Treasury to states. Through its new resources, ALA is promoting the federal program to assist state chapters and local libraries in accessing funds as the program develops in 2022.

ALA led a campaign throughout the year to garner support for federal legislation to provide funding exclusively for public library facilities for the first time since 1997. Library champions in the House and Senate introduced the Build America's Libraries Act in early 2021 to designate funds for construction of modern libraries in underserved and disadvantaged communities as well as renovation and enhancement of facilities to reduce the risk of COVID-19 and vulnerability to natural disasters. Though advocates garnered strong support for the Build America's Libraries Act, the bill was not included in the hotly debated congressional spending packages, which were significantly paired down.

Library workers also benefited significantly from the government's response to the health emergency when the U.S. Department of Education (ED) announced a change to Public Service Loan Forgiveness (PSLF) program rules. For a limited period of time, borrowers can receive credit for past periods of repayment that would otherwise not qualify for PSLF. Many library workers previously denied eligibility have received tens of thousands of dollars in loan forgiveness. Having long advocated with education coalition partners for changes to PSLF, ALA encouraged library workers in all contexts to ascertain their eligibility for the program before the waiver ends on October 31, 2022.

"Advocacy as disruption? Yes! What if we revolutionize the way we fund and equip our libraries in order to confront head-on the inequities that we often decry on our protest posters and in our institutional committees? What if our lowest-income neighborhoods become home to our most well-funded and well-staffed school libraries? What if universities that serve the highest percentage of first-generation college students shift a larger portion of their budgets to their libraries? What if library trustees become adamant that their mayor or city manager help them respond to rising high school dropout rates by establishing a standalone public library for young adults in a shopping center facing low tenancy? What if we connect the dots between library and community disinvestment and position our advocacy efforts to counter them both? I believe we can. What's more, I believe we must."

– TRACIE D. HALL, ALA EXECUTIVE DIRECTOR IN THE MARCH 2021 ISSUE OF *AMERICAN LIBRARIES*

HOW WE READ IN 2021

When Americans sat down to read a book in 2021, one in three elected to look at an electronic device rather than a print book.

A study by the Pew Research Center found that print was still the reader's primary choice, with 65% of adults saying they read a print book. But the study also showed that e-book consumption has begun to go into overdrive, with uptick from 25% to 30% since 2019.

That surge has impacted libraries, which have seen increased demand for e-books. But libraries have also had to wrestle with a licensing system from publishers that has hampered their ability to meet that demand. The biggest challenge has been the reluctance of e-book publishers to provide the materials and the often exorbitant costs associated with them.

Whereas libraries can buy print books in bulk and, under the "first-sale doctrine," can lend the books to an unlimited number of readers for free, digital content is a different story altogether. Publishers sell e-books to third-party vendors such as OverDrive that, in turn, sell the rights to libraries.

According to OverDrive, patrons worldwide checked out half a billion items in 2021, a new record. In states and cities across the U.S., e-book demand is rising. In Massachusetts, for example, the Library eBooks and Audiobooks program, which provides digital assets to patrons at 377 state libraries, saw demand climb by more than 40%.

As Michelle Jeske, Immediate Past President of the Public Library Association (PLA) and Denver city librarian, told the

New Yorker, at the Denver Public Library, digital checkouts have grown at a rate greater than 60%, to 2.3 million, while spending on digital content went up by one-fifth.

But e-book rights have a limited shelf life and are often sold at above-retail rates.

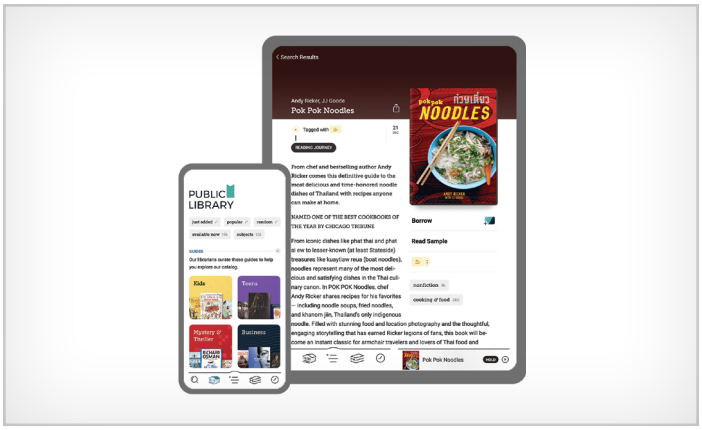
According to research from the American Library Association, for popular trade e-books, libraries often pay $55 for one copy that expires after 2 years (or $550 for one copy for 20 years). Meanwhile, a consumer will pay about $15 for perpetual use. By comparison, libraries can purchase hardcover books for around $18-20. The challenges don't end there: non-price terms are similarly problematic, such as the ability to archive and preserve works or develop versions for people with disabilities.

But there were some positive rumblings of change in 2021.

One provider, Amazon, which had been withholding e-books from libraries, started to loosen its grip. In 2021, Amazon announced a deal with the Boston-based Digital Public Library of America to start licensing its e-books to public libraries.

As we move into 2022, libraries continue to fight for equitable access to e-books.

The American Library Association Digital Content Working Group issued a paper calling on publishers to offer licensing models that are cost-effective and flexible and for library digital content providers to revamp platforms to support flexible licensing models, robust collections, and enhance accessibility features.



Overdrive's Libby app connects readers to e-books.

Efforts are continuing on the legislative front, only to meet with continued resistance from publishers and even from at least one governor.

Maryland passed a law requiring publishers licensing "an electronic literary product" to consumers to also license the content to public libraries "on reasonable terms." The Association of American Publishers took legal action, obtaining a preliminary injunction from the U.S. District Court for the District of Maryland.

And in New York, Governor Kathy Hochul vetoed legislation that would require publishers to offer licenses for electronic books to libraries under reasonable terms.

But moving into 2022, the trend is toward more legislative intervention, as more states are introducing library e-book bills.

WAITING IN VAIN

While patrons continue to discover and rely on digital content, libraries are engaged in a behind-the-scenes fight for fair pricing, multiple licensing models, and full access to digital content from publishers.

Michael Blackwell, director, St. Mary's County Library in Maryland and member of the ALA Joint Digital Content Working Group, explained what library users should know about this hidden struggle:

"The most important thing to know is that libraries do not own most or nearly any of the digital content. Instead, we license it. Unlike with a print book, which we buy, own, and circulate, digital content circulation is still owned by the publishers, who can set limits on the length of time we have the rights to share it or even say we cannot even have a license at all.... It is nearly impossible to build a collection as deep and rich as what we offer in print, even as demand surges for digital in libraries, especially in the wake of the COVID pandemic. Readers see less variety and have longer waits for the best-known content, especially as libraries are increasingly stretched by having to meet demand for digital while still providing print without notable increases in funding."

The Need for Change: A Position Paper on E-Lending by the Joint Digital Content Working Group

December 2020

Introduction

COVID-19 has for months shuttered most library buildings. Libraries have been forced to operate entirely electronically. Schoolchildren and their parents have been especially disadvantaged: many and perhaps most school systems began in autumn 2020 as online only, with in-school library collections languishing unused. Public and academic libraries started slowly but safely to re-open, often for curbside service only, only to be forced to scale back by an autumn pandemic resurgence. Much concern and uncertainty about safety exists. A study of COVID-19 and library materials has suggested the virus can survive on commonly used library materials, if stacked, for at least 5 days and even longer on some materials, leading to quarantining periods, complicating circulation, and raising further concerns about personnel and public safety. Even as libraries open, users may stay away or avoid physical materials to avoid any possible virus transmission; a return to using a mix of physical and electronic materials will be slow, influenced by both public health guidelines and public opinion.

While we all look forward to the end of the pandemic, we must also recognize that the pandemic will have lasting effects on society: how we live, work, learn and play. The pandemic has accelerated trends that were already happening; however, the pandemic has also introduced unforeseen new behaviors and expectations. Libraries are grappling with extraordinary demand for both digital content and services--two costly program areas--that will add to the strain on already lean budgets.

This disruption has highlighted the importance of digital media and thus underscored a problem that libraries have raised for years: that some digital pricing and business models unreasonably hamper and sometimes entirely block access for library users. The problem existed before COVID; COVID has just revealed how bad the problem is, as those who rely on library materials for education, information, access to new thoughts and ideas, or simply some comfort in the face of physical isolation face long waits or unavailable materials. For libraries, the inability to provide access is an existential threat, particularly in the age of COVID, regardless of whether it is access to a best-selling novel, an important documentary, the latest research, or a or a book about the Constitution. Those who rely most on libraries – often poor or otherwise marginalized groups -- are especially disadvantaged, as are many students and their families as they struggle to succeed in remote learning situations.

The Joint Digital Content Working Group has developed this position paper, describing some current (and indeed long-standing) problems in providing digital content that harm libraries, and consequently society broadly. Further proposals for particular action may spring from it later.

We recognize many works exist in a commercial framework, and we recognize creators' and publishers' need for fair remuneration. We salute some publishers for adopting some flexible

models and sometimes reduced pricing during the pandemic, especially since these changes show that some of the terms we seek are possibly long-term. But publishers should recognize the value of and support the role of libraries in civil society and honor these roles as we transition to the digital age. Libraries help with discovery, often giving new authors their first, vital visibility, and all manner of free marketing for many authors and publishers. Academic libraries create a market for rarely-circulated titles; research libraries in particular serve as the memory for our society. School and public libraries promote reading, growing the next generation of readers. Libraries are an essential part of the democratic enterprise, promoting and sharing ideas, knowledge, and creative expression, ensuring accountability, and preserving the cultural record. Note here that we define works and publishers broadly: not just creators and distributors of books, but audiobooks, sound recordings, moving images and other materials.

To best serve their communities, libraries need the choice among a variety of licensing models from publishers. Libraries and communities differ and have different needs. No one model is good for all types and size of libraries. A blend of models, such as perpetual access to allow for libraries to maintain the history of published works along with circulation-based metered access to allow for libraries to meet burst demand for high-interest works, might meet many situations. Also important are circulation-based metered access and other models to address short-term demands for high-interest works or for limited access by classrooms, book clubs or other groups to meet the educational, informational and civic missions of libraries. Because a huge variety of models could exist—perpetual access, metered by circulation, pay-per-use, or subscription, with or without simultaneous access by multiple users—setting out a "must have" model for all libraries is difficult. In some ways, however, the exact license terms may matter less than price. What we need are models with prices that approximate costs for use of print to deliver digitally the same library service we deliver with physical materials. If this need were met in some form, perpetual access to a title for example would be a "nice-to-have" for public libraries, even at a premium price, but the perpetual use option will always be "must have" for academic libraries. Ideally, we would have access to all copyrighted titles with prices and models that allow flexibility: keeping some titles perpetually at perhaps a higher price while providing greater access to poplar titles while they are in high demand.

While some current publisher licensing and pricing models complicate access by library users, other issues also contribute to our ability to meet demand, including library vendor practices and the increase in content (especially streaming) to which libraries have no access. Some aspects of the library digital content experience have improved in the last decade—it no longer takes 17 steps to get a library ebook. Overall, however, licensing models, pricing, and even some content availability is worse than ten years ago. But change is urgently necessary if we are to fulfill our mission while moving to a digital age, a move the pandemic is accelerating.

Looming Budget Crisis Impacts Libraries' Content and Services

The pandemic has done terrible damage to state and local budgets, as well as the broader economy—and it is persisting. Public libraries will face huge budget pressures during the time that the public needs them more than ever. Public libraries are concerned that their staff and services will be targeted for cutbacks. For some, cuts have already occurred with more cuts

promised. School libraries, often poorly funded to begin with, may face further cuts as schools are forced to make expensive adjustments to run virtually and eventually make classrooms safe for in-person attendance. Academic libraries face these same concerns while enrollment fluctuations and disruption create an uncertain budgetary future. With talks of deep budget cuts to compensate for lower enrollments and budget shortfalls, cuts to resources seem inevitable. While there has been considerable talk about some federal relief, the Congress and the President remain at an impasse.

When libraries do reopen, there will be a necessary focus not only on the redesign of physical space to promote healthy distancing and safe face-to-face services, but also a focus on the rethinking of digital resources as well, from equitable access both in-person and remotely, as well as a rethinking of what resources best serve a new financial reality. Libraries will need to scrutinize, even more closely than they already do, how every dollar is spent. Libraries will be confronted with a necessary rebalance of physical and digital resources as many of the temporary financial accommodations from publishers either will not survive or have already expired.

Yet, the preference for digital content will likely continue even after stay-at-home, shelter-in-place, and physical distancing restrictions are lifted. If libraries cannot find ways to make digital collections robust, affordable and lasting, including a return to perpetual access as an option, they will never be able to meet an ever-increasing demand and provide equity of access to the communities they serve.

The Public Library: Roles and Needs

Public libraries have an important cultural mission, existing so that knowledge, culture, and the materials that foster learning may be shared and preserved for all. Every content experience is valuable to the user, be it for research, to improve job prospects, or simply experience the complex and full range of emotions and thought that a novel or music can supply. Recent changes in digital licensing models frustrate that mission even more than previously, and the availability of titles and costs also restrict access for all in public libraries. More broadly, these changes complicate supporting K-12 students in states where there are no meaningful school libraries, even as their need for support increases.

During the pandemic, demand for digital materials has intensified. In the first week of April, 2020, 10.1 million digital books were borrowed from public libraries worldwide via Libby, according to statistics from OverDrive, the company behind Libby, which represents a nearly 30 percent increase compared with the same week in 2019. Nearly all libraries report the same trend. Meeting demand is increasingly a challenge for many reasons. Budgets are a problem. Public libraries are already seeing layoffs, furloughs, and budget cuts, with many or most bracing for the worst to come in the next few years. Yet diminishing revenues are not the only issue. The cost and content licensing models of many publishers make building and sustaining robust digital collections difficult. While some smaller and mid-sized publishers have offered multiple license models and reasonable pricing for some time, and (as noted above) even some large publishers have made adjustments beneficial to libraries during the pandemic--and we

salute them for showing what is possible--some of the largest publishers' current practices are frustrating and unsupportable, seemingly designed to restrict library readership. We are concerned that after the pandemic, any beneficial changes might also be rolled back.

A recently conducted study has detailed changes made by the so-called Big 5, the publishers which are responsible for the great majority of best-selling titles that see high demand at public libraries. By 2018, all the Big 5 offered only metered access, giving up perpetual access altogether. The study documents that "the average price per copy [of ebooks] has tripled in nine years at the same time that license models have become much more restrictive." A combination of time-metered access at high prices means a high price per circulation for libraries. Maintaining ebook collections is becoming unsustainable.

Another study, first with a limited number of titles but eventually of 100,000 titles, identifies still other issues in the market. While 65% of older titles in a list of culturally significant works were available in ebook format (as compared to 94% in print)—a rate higher than expected by the researchers-- license terms and pricing did not significantly vary from newer titles. These titles which may be of interest but in lower demand, are less likely to be licensed, especially with time-bound metered licenses. Prices sometimes varied from library vendor to vendor, sometimes as much as 500%. In this 2017 study, license terms also often varied by vendor, though that difference may be less now that at least the Big 5 have adopted the metered license as standard.

A follow-up 2019 study of three vendors in the USA and Canada validated some of these findings, suggesting that prices for the same titles could vary widely by vendor, ebooks generally cost more their print counterparts per circulation, older titles often cost more than might be expected for the same licensing terms, and, while vendor coverage of titles varied more in Canada than in the U.S., no single vendor had complete coverage of all the available titles. Taken together, these studies suggest that maintaining a robust collection of older but still significant or less-high demand titles to match our print collections is nearly impossible, while we cannot necessarily trust publishers to offer the same cost per title to the various vendors or perhaps that all vendors may not reflect all publisher discounts. While it may provide the best "bang per buck," are public libraries destined to offer a revolving carousel of only the titles most popular at the moment? Current Big 5 models drive library digital content selection towards a limited boutique collection, with a study showing "higher prices result in smaller collections skewed away from the midlist."

The 2019 study cited above also suggests that the availability of titles can be an issue: "collecting ebook titles of less popular interest may be a challenge, especially in poetry, drama, and literary fiction." We shall take up this issue in greater depth below in the academic library section of this paper. For now, consider that "40 titles [out of 574 sampled] were not available to library ebook readers but were available to Amazon users via Kindle, Audible, or both formats." Amazon, which has become a larger ebook producer than some of the Big 5, is increasingly dominating the market. Popular authors, understandably lured by Amazon's deep pockets, are signing deals for titles that Amazon alone carries.

Amazon's failure to license their "exclusive" content to libraries poses a threat to the preservation of content as well as shutting out any reader without or unwilling to use a credit card. Amazon unbalances the library digital content market in another way. It allows only one vendor to offer content in its popular Kindle format. Whether or not libraries should encourage use of a proprietary format that forces readers to go to Amazon, privileging one commercial entity, is a debatable matter. That only one library vendor should have this competitive advantage is not. Since many libraries are unwilling to give up the percentage of readers that use the Kindle format, even if weaning them to a standard format and away from dealing with Amazon might be desirable, competition among library vendors is unacceptably skewed.

Amazon, however, is not the only problem. For public libraries, having all copyrighted works made available to us is becoming increasingly "must-have," especially as exclusive content has become a streaming service business tactic. We shall explore this trend in even more detail in the academic library section below. For now, consider a list of titles that as of this writing libraries cannot provide to our users:

· *Charlotte's Web* ebook (also, *Stuart Little*, *Trumpet of the Swan*, and other E.B. White books)

· *The Coming Storm* digital audiobook by Michael Lewis (Audible exclusive) – not released as an ebook or in print at all

· *In the Heart of the Fire* digital audiobook by Dean Koontz (Audible exclusive) – released as an ebook but not in print.

· *The Mandalorian* (Disney, not released on DVD)

· *Schitt's Creek*, which just won several Emmy awards (Netflix, not released on DVD)

· *The Marvelous Mrs. Maisel* (Amazon, not released on DVD)

· Later seasons of:

  - *Stranger Things* (Netflix)
  - *Grace & Frankie* (Netflix)
  - *Bosch* (Amazon)

How might these problems be addressed? First, no single licensing model suits all library needs. All publishers, and most urgently the Big Five, should offer the option for a perpetual access. Such a license might well be offered at a higher price than a metered model. The option is essential for libraries to build long-term collections as rich as what we offer in print. Furthermore, the time-based metered model, with licenses expiring in one or two years, often results in a high cost-per-use and discourages the licensing of many titles by new or less well-known authors. It should be abandoned for a circulation-based model, with licenses expiring

only after a set number of checkouts have occurred. Only then will libraries be able to know what their cost-per-use on metered access titles might be. During the COVID-19 crisis, at least one publisher is offering licenses on audiobooks in both perpetual and metered models. We salute this practice: it shows that options for variable licenses can be offered. As a gesture of their willingness to work with one of their main customers—perhaps their biggest one—we ask that the Big Five (and other publishers) immediately make these licensing changes, offering both a lowered cost on metered (by circulation) licenses and perpetual options at once. Other models can and certainly should be considered: pay-per-use, subscription, simultaneous use of metered licensed titles, varying prices depending upon the likely demand for titles, etc. But two basic ones--a premium cost perpetual and lower cost metered (by circulation)—are essential if a single low-cost perpetual model is not fair (at least to publishers) on every title.

This change would be a vital step in working together to get content to readers, increasing visibility and ultimately consumer sales, while allowing libraries to develop their best collections. We believe this move will also be good for publishers, as libraries help readers discover items they wish to purchase: "One of the big concerns in the publishing industry about selling e-books to libraries is that allowing free access to e-books through libraries might eat into book sales. In fact, Pew Research data show that those who use libraries are more likely than others to be book buyers and actually prefer to buy books, rather than borrow them."

Second, we should as a profession advocate for access to content so that no company can offer competitive advantages to one vendor that lessens competition in the library digital content market. This advocacy will probably have to take the form of legislative action. Tech giant publishers creating content that users cannot access through libraries is a threat not only to libraries but to democracy, deepening the digital divide. Addressing concerns about cost variations among library vendors and ameliorating the need for libraries to have greater choice in selection are more difficult to address. It is to be hoped that all the library vendors will contract with as many publishers and offer a wide a selection as possible. The issue of cost variations could be addressed by greater communication. Publishers might work with libraries more and announce sales. Library vendors should be open about pricing and always reflect publisher discounts when such discounts are offered.

Existing license models are not sustainable for libraries. Library users are being excluded from reading as surely by those models as they are by the physical barriers to borrowing created by the pandemic. We seek a fair deal for all, but we must wonder if a digital version of first sale would best suit the need for public access, with the original intent of copyright in mind: to "promote the progress of science and the useful arts—that is—knowledge." Perhaps legislative measures may need to be enacted if we cannot find some middle ground with publishers. Interestingly, on April 28th, 2020, the Congressional Research Service (CRS), a "nonpartisan shared staff to congressional committees and Members of Congress [operating] solely at the behest of and under the direction of Congress," released a "Legal Sidebar, COVID-19 and Libraries: E-Books and Intellectual Property Issues." It "explains how copyright law governs e-book lending; describes how the COVID-19 pandemic has affected e-book accessibility; and outlines some possible legal approaches Congress may consider." Though not without flaws from a library perspective, that report suggested "Congress could now re-examine the market

and determine whether it has matured sufficiently and in a manner that would warrant" providing "limited copyright immunity for library e-book lending" or even a "digital first sale doctrine." We as a profession must continue to work with our legislators to keep them informed as we move into an increasingly digital world.

The Academic Library: Roles and Needs

Academic libraries, particularly research libraries, are critical stewards of cultural memory, and publishers of all kinds must offer content in a way that supports this basic function, for otherwise the content is all but useless for our purposes. Access to the contents of research libraries are critical to the function of the enterprises of teaching, research, and scholarship. When content used in teaching can't be shared with students, learning is hindered. When content used for research can't be accessed, scholarship is hindered. In such a world, discovery, innovation, and progress is lost. Academic libraries serve the broader enterprise of research and education, often with methods such as inter-library loan (ILL) that are less viable during a pandemic and increasingly dated in a digital ecosystem, and changes to enhance this mission are necessary.

While publishers have sometimes been forward thinking in their delivery of and licensing models for front list books, access to backlist and out-of-print items has lagged. As a result, millions of titles are inaccessible on the shelves during our current crisis are totally unavailable since they do not exist in digital form. The market is failing to meet research needs. A study cited earlier gives some specific examples. While it mostly examined current titles and did not survey every Pulitzer Prize winner, for example, it found huge gaps in availability. Unavailable titles from before 1990 include six Pulitzer Prize winners or nominees and other significant titles:

- *A Summons to Memphis*, Peter Taylor (1986, Pulitzer)
- *Elbow Room*, James Allen McPherson (1977, Pulitzer)
- *Guard of Honor*, James Gould Cozzins (1948, Pulitzer)
- *Humboldt's Gift*, Saul Bellow (1975, Pulitzer)
- *The Elected Member*, Bernice Rubens (1969, Booker Prize)
- *The Way West*, A.B. Guthrie (1949, Pulitzer)
- *Tales of the South Pacific*, James A. Michener (1947, Pulitzer)

A wider study would certainly find other works of scholarly interest to be unavailable. Libraries have proposed a solution, controlled digital lending, that would provide access to those titles while preventing mass distribution of titles that publishers have not digitized and commercialized. Controlled digital lending is a stop-gap measure, but it at least allows access to works otherwise unavailable in digital format: almost invariably out-of-print, perhaps with little commercial market, but still culturally significant. Despite market failures and even during

emergencies like COVID, it is still not a replacement for properly produced e-books from publishers.

The same study also suggests that even when under license, titles of academic interest might be unavailable due to a combination of pricing and licensing. For example, “The Collected Stories of Katherine Anne Porter costs $10.95 in print in the U.S. All three U.S. ebook vendors sell it for $40 on a 24-month license. This title is culturally significant. If it had a guarantee of 52 checkouts in 24 months, costing 77 cents per use, many librarians would likely purchase it. If it circulates 10 times in its license, its cost-per-use is $4 for the ebook. For print, the cost [for the same number of circulations] would be about $1.10, and the book [might well] still be available [after two years].” This title would not be suitable for a class read because the ebook could only be accessed by one student at a time. A high cost-per-use for a short license period may be unattractive in digital format for academic libraries and certainly raises concerns about maintaining long-term preservation without controlled digital lending.

Audio and moving image material is even more problematic for academic than for public libraries. Libraries hold sizeable inventories of physical versions of these materials that are now inaccessible. When a title is not available in digital form—for example, of a title that is on reel of film--current law on media often prevents libraries from creating a digital copy that can be shared. Libraries can often only provide access to titles available from a streaming vendor, and of course not all titles are even available in this way. A specific example is instructive: one of our group members, an academic library, was asked to provide, if possible, access to two documentaries recently for classroom use: *The Social Dilemma* and *Living on a Dollar a Day*. Neither could be provided. The inability to provide *The Social Dilemma* was particularly frustrating for librarians and professors because of the timeliness of the election, which had led to many requests for use. *The Social Dilemma* is only available on Netflix and *Living on a Dollar a Day* is only available on Amazon Prime.

For many academic libraries, streaming access is in any case beyond financial reach due to exorbitant pricing models by the vendors. The model for streaming is usually 1-3 year licenses at rates similar to public performance rights, even if it is a single researcher accessing the digital title. As we look to the future, where more and more digital material is available streaming only, the ability of academic libraries to serve faculty and students is increasingly under challenge. The lack of an ownership or perpetual access model for digital media conflicts with the academic library’s mission to build collections and provide ongoing access as well as threatening these titles’ future preservation. Some vendors do not even offer an institutional pricing model at all, transferring the burden to students via their personal streaming accounts like Netflix, Hulu or iTunes. This model in particular creates vast inequity among students, who must have a credit card on which to pay a monthly subscription fee or per-title access. These examples illustrate that pricing is not the only barrier. In many cases, the content is not available to libraries in a form and with terms that is accessible to users at any cost.

Textbooks in digital format are a long-standing problem. E-textbooks have been shut out of the library ecosystem for many years now. Many schools tried their best to at least maintain a print copy for the sake of preservation. For college textbooks, there have been initiatives to ensure

access to print texts to students through reserves collections. For K-12, there are many state initiatives to ensure that state-adopted textbooks are on the shelves of academic libraries' curriculum centers. The current crisis has accelerated the already quickly growing market of electronic textbooks—run through student bookstores and often tied to an individual access key that expires at the end of the academic year. This model does not allow for the multi-person access on which library missions are built. They also do not allow for long-term preservation for future researchers and historians to study the history of education in our country. Now is also a good time to revisit this model with publishers to correct this decades-long pattern of shutting libraries out of textbook collection. Electronic textbooks are increasingly important for student success, particularly for the most challenged and disadvantaged students, as our institutions of higher education and libraries try to support these students in the current emergency and through the future changes in teaching.

Research libraries expect and require the ability to provide access to the cultural record that has been collected for centuries to their users in the format that is necessary for that moment. Limitations to distribution are necessary but the inability to purchase and maintain digital copies impedes the fundamental mission and purpose of a library. This is utterly unsupportable and may ultimately require legislative solution.

Publishers' use of licensing models over ownership models prohibits the cultural stewardship role of the academic library. Publishers in general, and academic publishers in particular, must return to a perpetual use model if this option has been abandoned. Vendors of streaming film should adopt models that allow perpetual access and that do not place public performance rights prices on films that are often being used by only one researcher at a time, or at least provide a licensing option to institutions allowing for less expensive individual viewing.

School Libraries

Even more than for pubic and academic libraries, the pandemic has complicated the use of ebooks and other digital content in school libraries. These librarians face special challenges with acquiring and sustaining digital collections, even as demand for digital is increasing. Some of the issues these libraries currently face are unsolvable by librarians. With many districts opening only virtually at the start of the fall and delaying in-person attendance with the later resurgence of the pandemic, many students, perhaps particularly in less affluent or rural areas, simply don't have access to online instruction, much less school library materials. One of our paper's authors lives in a rural county. There, even affluent neighborhoods may lack broadband access due to the failure of providers to reach the "last mile." Wi-Fi hotspots, though relied upon by schools as a stopgap, may not help due to poor cellular coverage. While smart phones may seem ubiquitous today, teachers report that "lack of access to unlimited-data plans proved to be a barrier for some . . . students." Nationwide investment in public broadband—a need nearly as important today as electricity to be informed and participating in society is needed.

Even where broadband exists, however, difficult problems complicate access. Funding is paramount among these. For example, according to Melissa Jacobs, Director, New York City Department of Education, New York City School Library System, funding for school libraries in

New York state is $6.25 per student. With this budget, school librarians are hard-pressed to provide print books in normal times, much less to provide ebooks or other digital content which might cost $65 or more to license. While some providers of digital materials to schools are more likely to offer perpetual licenses than the Big 5 are to public libraries, the prevalence of "exploding" time-bound licenses in areas such as best-selling teen titles can make licensing all but impossible. A recent article in *School Library Journal* by Lauren J. Young, "Fast & Curious: Librarians Grapple With The Ins And Outs of Purchasing Ebooks" concurs, suggesting that "acquiring and distributing ebooks can be a flawed and complicated business." While many companies offered materials for free at the start of the pandemic, "many free services have expired, despite the hundreds of schools still remote learning or limiting on-campus activity. Now, librarians are left with a tough decision: Do they continue with a paid ebook service?" The author concurs that "The cost of licenses, like single user ebooks, can quickly eat up a budget if not planned carefully. Exorbitant prices and ongoing fees to maintain e-collections are a major block" and that expiring licenses are "budget destroyers."

Of special interest to school librarians are class sets, which the librarians would provide for one of the most important clients: teachers. Class sets must be available in some way to many students at once. They might be available simultaneously on one license, or at the very least at low cost per title for a number of licenses. Class sets are unlikely to be needed for more than a month or two, and then yet another title might be needed. Such short license terms (or low costs) are unlikely to be available for most titles. Even when available, licensing can be difficult, with many school systems requiring a longer purchase order process that complicates being nimble enough to work quickly to get new titles once older tiles are completed. Titles that are available this way may not always suit the needs of a particular teacher or group of students; teachers must then use what is available, with the content tail wagging the educational dog. Selection can be particularly frustrating for schools with large numbers of English Speakers of Other Languages (ESOL) students, as books in other languages may be limited in number. There is, however, an even more problematic alternative. Ms. Jacobs trains school librarians to be digital content license experts for the teachers and to know and use digital content properly, an educational function that is vital since many teachers may not be aware of the fundamental difference between copyright and license. Many schools may not have the luxury of a school library, much less a librarian. If schools do not have the funding to hire school librarians trained in this way, teachers may be confused about how best to provide access to protected content. use of titles can occur not supported under fair use. School librarians face the same constraints on providing textbooks that academic librarians do. With a textbook market set up to license only for individual rather than group use (or appropriate text books possibly not available in digital format at all) and with acquisition of class sets being nearly impossible, the school librarian faces a daunting task in meeting educational needs, even as teachers are most desperate for digital content while students face challenges with new modes of learning that may not be enhanced by quality monographic titles. Teachers and students—often perhaps the most economically vulnerable students—end up frustrated, and the educational enterprise is imperilled in an already difficult time.

There have been some innovative efforts to address these problems. The Internet Archive's Open Library Student Library makes many titles available, but, being based on Controlled

Digital Lending, cannot fill the need for class sets. The Open Ebooks app makes thousands of quality titles available for free, with no waiting and simultaneous use possible. Use of this resource is, however, limited to students who qualify under Title 1, with special codes being needed for access. The distribution of codes and passwords is cumbersome and creates additional obstacles for students. This initiative is a fine effort to confront a big problem but until access can be expanded—which would require the permission of the publishers providing the books--it cannot meet many needs. The initiative for public libraries to work with school systems to provide every student a library card is laudable indeed, but shifts the demand to a source also generally unable to provide most titles simultaneously, or at least not without paying a cost-per-use that might preclude purchase of much other digital content for public library users. Nevertheless, the example provided by Nashville's Limitless Libraries, in which public and school libraries are completely integrated, is instructive. The Georgia Public Libraries eRead Kids project, providing "more than 15,000 electronic and audio books," is for children from pre-K through fourth grade" and is available to all Georgia Public Libraries. A project extending an initiative like this to all schools, perhaps partnering with public library, local, state, federal, and grant funding, might begin to meet school librarian needs. Our group encourages district, state, and federal funding of school libraries as one way to close the digital divide, and the development of shared content at the state or even national level, with publishers seeing how they can develop future readers as a possible gain." Until the will and funding to build such projects can be found, however, better and more flexible licensing models to meet school library needs, is imperative. As noted by Kipp Bentley, "Even with increased 1:1 laptop initiatives, schools' purchase and use of ebooks has leveled. A big reason for this is the draconian restrictions book publishers have imposed on ebook lending." Meeting student need for content is a pressing challenge, yet many U.S. public and non-public school libraries cannot afford ebooks at all. Because of their greater cost and restrictive licenses, digital audiobooks have little place in many school libraries, though "reluctant readers" might benefit greatly from them.

Conclusion

If libraries can acknowledge the critical role of the publisher in our information ecosystem and broader society and publishers can respect libraries' responsibility to a public good that goes all the way back to the formation of our democracy, then perhaps we can meet on a middle ground. Library purchasing, marketing, and engagement are economically advantageous to publishers. Especially now as publishers are also under financial stress with layoffs, furloughs and budget cuts, and some avenues that authors use to earn income such as book tours are closed, the need for dialog is paramount. Both sides can benefit by recognizing that people create books, film, and other expressions of knowledge not only for financial gain but as an expression of thoughts and ideas, and libraries can help publishers and authors survive economically not only in a difficult time but in an increasingly digital age. Put simply, a writer needs a reader. The publisher and the library connect the two. And works deserve to survive, and to be preserved across time. This is the ecosystem that we should be striving to preserve—the one that symbolizes the freedom of the mind.

This is a powerful moment for libraries, a juncture where there is an opportunity to evaluate and require equity in terms of the three components necessary for a successful library experience:

access, discovery and delivery. As usage by library patrons increases, and as academic and school libraries increasingly turn to digital, libraries are in a strong position to advocate for digital equality.

This is the moment for libraries of all types and the funding agencies that support them to call upon publishers to increase and improve access to new and exciting e-content to our customers, regardless of their ability to pay and to be fair in their pricing and delivery methods, not just now, but from now on. Libraries must require publishers to offer new ways for our customers and community to discover the informational, educational and recreational resources public libraries provide, whether printed, online or virtual.

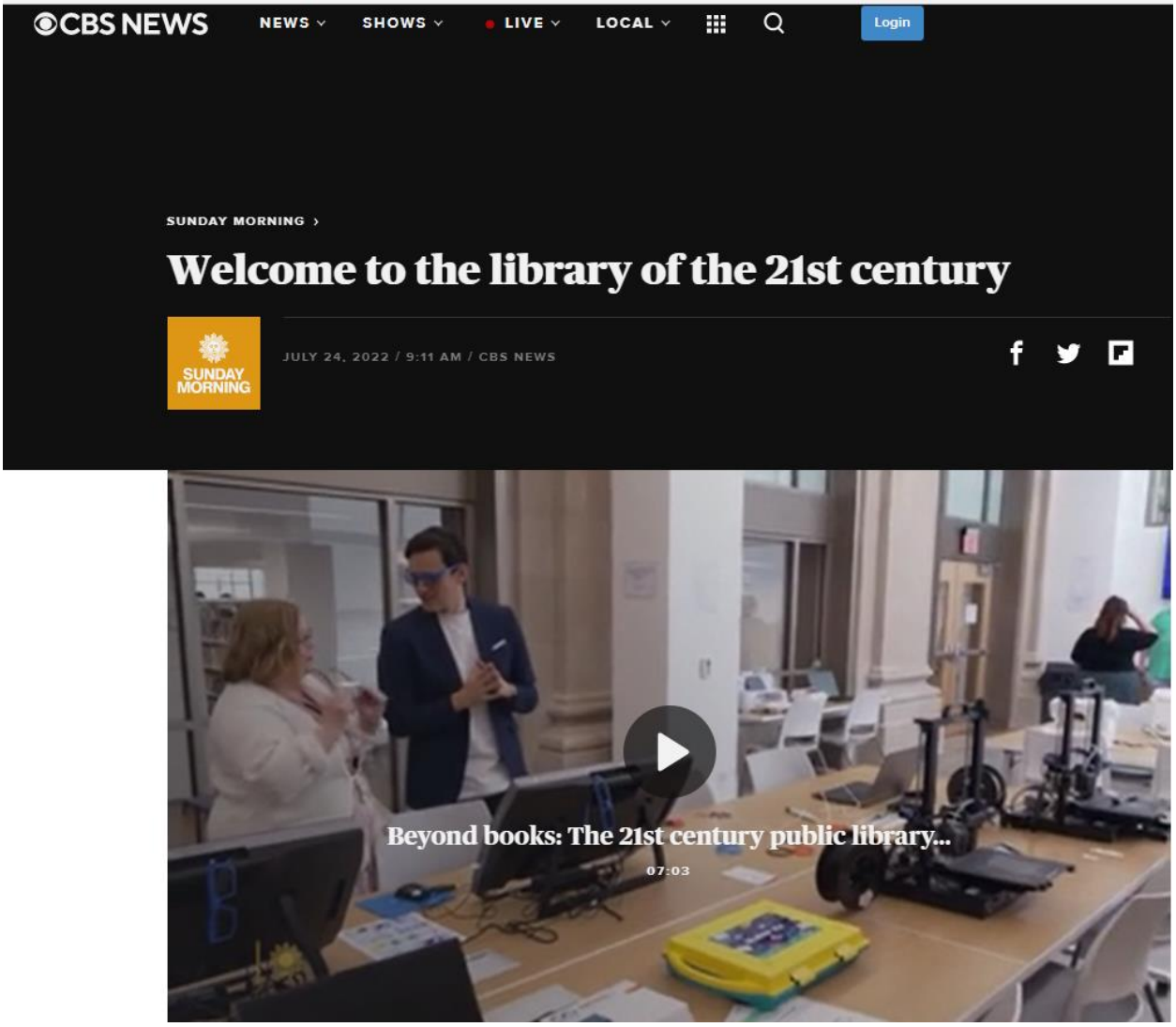
As a united group of public service institutions, libraries must ask publishing leaders to join us in creating a model that calls for open accessibility and equity not just some of the time and not just for some of the people, but also for everyone, all of the time, under any conditions, in any market, as a matter of industry practice.

Libraries should remain steadfast in doing what benefits their patrons. An increasing preference for digital content will continue even after stay-at-home, shelter-in-place and physical distancing restrictions are lifted. If we cannot find ways to make our digital collections robust and lasting, including a return to perpetual access as an option, libraries will never be able to meet an ever-increasing demand and provide equity to the communities we serve.

Acknowledgements: The JDCWG thanks Melissa Jacobs, Director of New York City's Department of Education School Library System, for her review of and her invaluable contributions to the section on school libraries. We also thank Carmi Parker, ILS Administrator of Whatcom County Library System, for her review of and informed contributions to the section on public libraries.

This is a link to a recent news story & video about the Modern Public Library:

[Welcome to the library of the 21st century - CBS News]



9 Case Studies of Mixed-Use Library Projects

- Select case studies of mixed-use public library & housing projects:
  - Rondo Branch Library of the St. Paul Public Library
  - Little Italy Branch Library of the Chicago Public Library

Rondo Community Library, branch of Saint Paul Public Library

Location: St. Paul, Minnesota
Designed by: BKV Group

From the Architects:

RONDO COMMUNITY OUTREACH LIBRARY, ST. PAUL, MN

The new Rondo Community Outreach Library replaces the current Lexington Branch Library and nearly doubles the space, providing more seating, books, public computers, community meeting space and an expansion of the library's small business resource center. The library occupies the ground level and underground parking is provided for the library's use.

CLIENT: THE CITY ST. PAUL
TYPE: LIBRARY
SIZE: 36,000 SF

NEIGHBORHOOD REVITALIZATION

This community-focused project was a joint venture between the public library and a private developer that combines library programming with a 234,000 SF mixed-use, five-story project. Located in a very diverse and vibrant community dedicated to renovating older structures, the new building is designed as a traditional multifamily complex with an urban edge. This urban-revitalizing project is illustrative of the essential role a library can play in maintaining a strong neighborhood by helping to renew a culturally diverse area.

Uniquely, the $25 million project is a showcase of new, affordable housing anchored by a library which has become a vitally important resource for the people of the Rondo neighborhood and surrounding community.

From the Library:

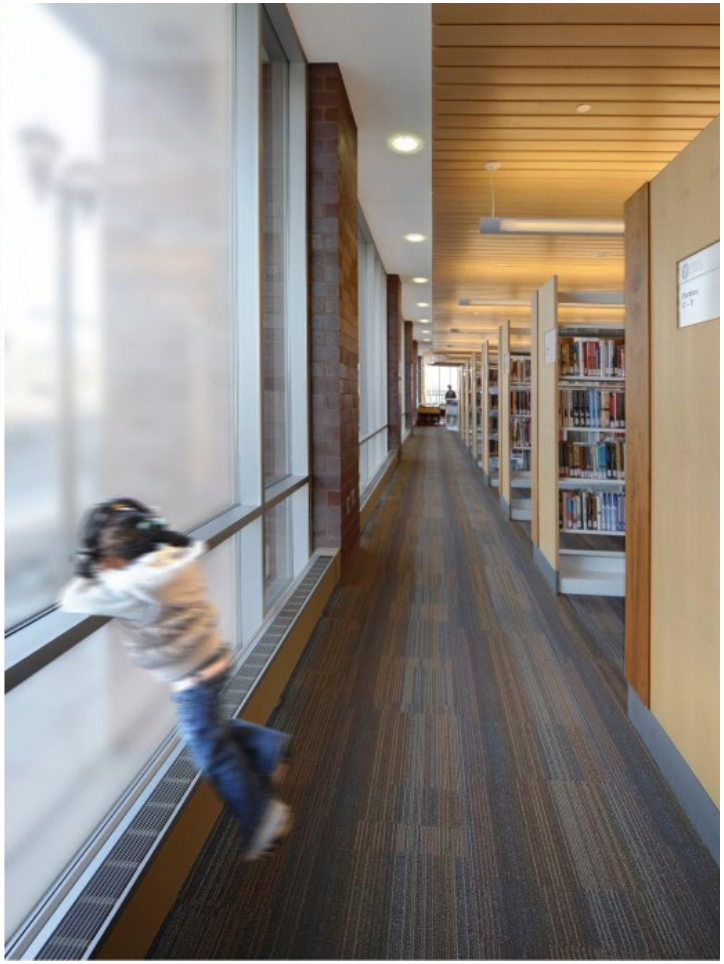
About Rondo Community Library

Facilities & Features

- After-hours Book Return
- Career Lab
- Computers
- Handicapped Accessible
- Hold Pick-Up Lockers
- Homework Center
- Lucky Day Collection
- Meeting Room
- Parking Lot
- Pop-Up Meeting Kits
- Study Room
- Tabling & Exhibits
- Wi-Fi
- Black Culture and History Collection
- Small Business Resource Center

Events (Selected Examples)

- FunLab
- Campfire Reading Club
- Pop-Up Advocacy
- Free Summer Meal from Nutrition Services
- Summer Spark: Ukulele Camp
- Family Storytime



From the Library Consultants:

Description from Godfrey's Associates

Multiple Projects for the Saint Paul Public Library, Saint Paul, Minnesota.
Saint Paul Public Library's (SPPL) Rondo Community Outreach Branch Library is a great example of a true public/private partnership. The 31,343 square foot library, opened in May of 2006, is part of a mixed-use complex constructed by a

private developer. The building program Godfrey's prepared for this project resulted from an assessment of the existing Community Outreach Library, several focus groups, a town hall meeting, and interviews with library staff.

Public-Private Partnership: The developer built the project at a cost to the City of Saint Paul of $9 million, finished-out – or $287 per square foot, far below market value. Mixed-use components include below-grade parking, three floors of condominium units over a second level of parking directly above the ground-level Library, and apartments to one side. A coffee shop is planned for the complex.

The Rondo Library is located on the Green Line train and bus routes 16 and 65. The Library serves a richly diverse population, including many persons from the African American, Bhutanese, Cambodian, Hmong, Somali, Oromo, Ethiopian, Lao, Vietnamese, Karen, and Spanish-speaking communities, as well as American Indian and Caucasian residents. The predominant household income level in the Rondo area was $0 to 15,000.

This Library plays a leading role in Outreach efforts system-wide, with services for children, their caregivers, local schools, and students. Emphasis areas are:

- The SWAMP (School Work And Mentoring Place) Homework Center providing help to students of all ages.
- The Business Resource Center, a collection of print and electronic resources to support the needs of persons starting a small business. Local partners provide weekly business consultation and career counseling.
- Workforce and digital literacy classes include word processing; Excel; Internet searching; emailing; job searching; resume writing; how to start a business; obtaining business loans; and marketing.

SPPL's largest collections of GED, ESL English as a Second Language, citizenship study materials, and world languages are located at Rondo. The branch features Black History/Culture and South-East Asian History/Culture collections, as well as a diverse collection reflecting the neighborhood, including public art.

From the Media:

PRWeb
by Ann McKinnon, The Friends of the Saint Paul Public Library, August 3, 2006

Rondo Library's Grand Opening Set for Saturday, September 9
(excerpts)

The Saint Paul Public Library's newest, largest and most community-oriented neighborhood branch, Rondo Community Outreach Library celebrates its grand opening on Saturday, September 9, 2006 from 10 a.m. to 5 p.m.

The new, award-winning Rondo Community Outreach Library/University and Dale Apartments is a public/private partnership which includes three floors of mixed-income housing, in addition to the 31,000+ square feet library facility, and serves as a national model for collaborative development. Features of the Rondo Library include: an expanded Black history collection with original Rondo Oral History recordings; a Southeast Asian history and culture area; more adult learner and language learning materials with over 500 titles in Spanish, a large selection of Somali music and in-depth resources for English Language Learners; assistive technology for vision- and hearing-impaired patrons; a larger Homework Center, tutoring spaces and an electronic classroom; an expanded small business resource center and community meeting rooms; teen and children's programming areas; a comprehensive collection of CDs and DVDs; public art installations and display; 102 public access computers; and the Abundant Bistro coffee cart.

Sources:

https://sppl.org/locations/rd/

https://bkvgroup.com/projects/rondo-community-outreach-library/

https://www.prweb.com/releases/2006/08/prweb419260.htm

Information as of July, 2022

Taylor Street Apartments & Little Italy Branch Library

Location: Chicago, Illinois
Designed by Skidmore, Owings & Merrill
(SOM Architects, Engineers, Interior Designers)

From the Architects:

- Client: Chicago Housing Authority
- Location: Chicago, Illinois, United States

Breaking the mold for civic architecture, the co-located Taylor Street Apartments and Little Italy Branch Library provide much needed affordable housing while bringing flexible learning spaces and versatile programming to the Near West Side neighborhood.

Project Facts:

- Status: Construction Complete
- Completion Year: 2019
- Design Finish Year: 2018
- Site Area: 38,640
- Building Height: 78 feet
- Number of Stories: 7
- Building Gross Area: 89,136 square feet
- Rental Units: 73
- Rooms: 73
- Sustainability Certifications: LEED BD+C NC (New Construction) Silver, BD+C, Silver
- Awards: 2019, Vision Award: Affordable Housing and Visionary Collaboration, Urban Land Institute Chicago Chapter. 2019, Best of Year Awards, Finalist, Interior Design. 2021, IIDA Interior Design Competition, International Interior Design Association (IIDA) Decade of Design. 2021, Design Excellence Awards - Distinguished Building, AIA Chicago. 2021, AIA/ALA Library Building Awards, AIA. 2021, AIA Honor Awards - Interior Architecture, AIA National

Project Description:
The Taylor Street Apartments and Little Italy Branch Library project realizes an innovative approach to mixed-use development through the co-location of affordable housing and a public library branch.

Accomplished through a public-private partnership with the Chicago Housing Authority (CHA), the Chicago Public Library, and Related Midwest, the project includes 73 apartments and a 14,000-square-foot library. SOM worked with local leaders to design this pioneering project, and in the process, the team explored new ways to create a better, more connected city.

Positioned prominently at the corner of the site, the library welcomes visitors inside with soaring open spaces designed for kids, teenagers, and adults located adjacent to centralized workspaces for librarians and staff. The south and east sides of the building that face the street use large panes of glass to maximize natural sunlight, while seamlessly integrating the library's interior with the activity of the streetscape outside. Lighting comfort and energy savings are further enabled by motorized blinds. SOM-designed wayfinding graphics visually articulate different segments and programmatic functions within the library without the need to put up walls and sacrifice daylight. Acoustic ceiling treatment and an acoustic hood over the teen area allows younger users to be a part of the space without disrupting other visitors.

As part of its diverse offerings, the library includes an Early Learning Play Space, designed to support parents and caregivers in developing early literacy skills in children through play; a YOUmedia space for teens to explore digital design, music, technology, 3D and 2D making with the help of skilled mentors; individual study room; and spaces dedicated to workforce development and technology for adults.

This seven-story complex is clad in terracotta colored, corrugated metal panels, standing out while drawing inspiration from the red brick masonry that defines the existing streetscape. The housing and library — as well as a street-level community room — are subtly set back and staggered across the site in order to accommodate a more welcoming sidewalk presence with new street furniture, and to preserve the Taylor Street Farms community garden.

Intended to contribute to the revitalization of the Little Italy neighborhood and accommodate an expanding community, the project provides 37 CHA units, 29 affordable units, and 7 market-rate units with floor-to-ceiling windows to create bright, daylit interiors with views of downtown Chicago. A green roof with native plantings provides additional spaces for tenants to socialize.

From the Library:

About Little Italy Branch

Neighborhoods Served:
- Near West Side
- Little Italy
- University Village
- Tri-Taylor
- Illinois Medical District

History:
- Library services to the Near West Side can be traced to 1891, when Reading Room No. 5 opened at Hull House.
- The library was named Roosevelt Branch in 1924 and occupied several locations in the vicinity of Taylor Street, Roosevelt Road and Halsted Street before opening at 1101 W. Taylor Street in 1998.
- In 2019, the branch moved to 1336 W. Taylor Street and reopened as the Little Italy Branch. This location is part of an innovative partnership between Chicago Public Library and the Chicago Housing Authority to co-locate housing with library services.

Facilities & Features:
- After-hours book return
- Bike rack
- Computers
- Meeting room
- Parking lot
- Scanner
- Study rooms
- WiFi
- Chinese-lanugage materials
- Online events
- Two ADA computer workstations
- YOUmedia teen digital learning space

Little Italy Events (selected examples):
- ESL - English Language Conversation Practice
- Baby Story Time
- Seeking Scrabble Players
- Mahjong Mondays
- Story Time in the Park: Mother Goose on the Loose
- Make a Monocular Telescope
- Film Screening: Cyrano (2021)
- Books & Your Brew Discusses: Memorial Drive by Natasha Terthewey

From the Media:

Chicago Finds a Way to Improve Public Housing: Libraries

by Michael Kimmelman in The New York Times, 5/14/2019

Article covers 3 projects:

- Taylor Street Apartments & Little Italy Branch Library
- Northtown Library and Apartments
- Independence Library and Apartments

(excerpts)

Other cities have combined books and subsidized housing, but the outgoing mayor, Rahm Emanuel, has embraced the concept with three striking new projects.

These are integrated works of bespoke architecture, their exceptional design central to their social and civic agenda.

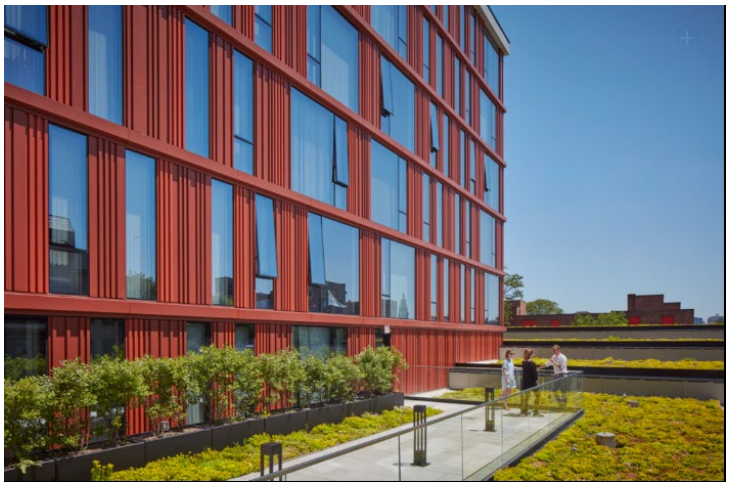
The libraries are devised as outward-facing hubs for the surrounding neighborhoods, already attracting a mix of toddlers, retirees,after-school teens, job-seekers, not to mention the traditional readers, nappers and borrowers of DVDs.

Mr. Emanuel persuaded federal officials that public libraries could be co-located with public housing projects without putting federal housing subsidies at risk.

That freed up streams of money for the co-location idea, which was partly strategic: the library helped sway community groups resistant to public housing in their neighborhoods.

But co-location was also just plain good urban planning. In cities across the country, branch libraries, which futurologists not long ago predicted would be made obsolete by technology, have instead morphed into indispensable and bustling neighborhood centers and cultural incubators, offering music lessons, employment advice, citizenship training, entrepreneurship classes andEnglish-as-a-second-language instruction.

The libraries share real estate with the apartments but maintain separate entrances.



Mr. Lee's project, the Taylor Street Apartments and Little Italy Branch Library, encountered the fiercest community resistance.The blowback ended up reducing the size of the apartment tower and stepping its mass back from the street.

The $41 million project includes 73 apartments, seven of them market-rate. At seven stories, clad in Aztec-brick and chestnut-colored panels, the building at once stands out from but also echoes aspects of the neighborhood. There are two floors with glassed-in, single-loaded corridors, the sort of perk you mostly find in high-end residential developments. A double-height library, with a curtain wall and bright orange acoustic baffles, anchors the street.

2021 AIA/ALA Library Building Awards: Taylor Street Apartments and Little Italy Branch Library

ALA

Chicago's Taylor Street Apartments and Little Italy Branch Library is an example of an emerging building typology that blends a mixed-income residential building with a bustling public library. It is also the city's first co-located project for the Chicago Housing Authority and Chicago Public Library. Situated on the corner of West Taylor and Ada streets on the city's West Side, the new facility synergizes its two unique programs and serves as a critical hub for the surrounding community.

To activate the street and respect the neighborhood's scale and texture, the team set the building back and staggered it across the site. In doing so, it created a new public space and preserved Taylor Street Farm, an adjacent community garden. With its prominent location, the building eagerly welcomes patrons into its bright and soaring open spaces designed for a wide range of ages.

The library's interior spaces and the residential amenities feature neutral tones and exposed concrete complemented by the warm wood tones of the casework, colored felt ceiling elements, and vibrant wall graphics. The graphics help define the discrete programmatic spaces, assist in wayfinding, and solidify the building's identity.

Above the library, the residential units boast floor-to-ceiling windows that supply ample daylight to the interiors. Residents overlook the communal garden and enjoy sweeping views of Chicago's iconic skyline. Many of the spaces were designed with communal living in mind, including shared amenities and rooftop green space.

The building's dual public and private roles prompted the team to take a holistic approach to sustainability. Before entering, both passersby and visitors are greeted by bike racks, designated spaces for carpool and low-emission vehicles, and local vegetation that broadcast the design's sustainable intent. Overall, the building benefits significantly from its green roof infrastructure, which helps reduce the local heat island. More than 95% of precipitation is managed on-site, and the landscape surrounding the building requires no permanent irrigation.

Despite being one of the city's newest library locations, it quickly became one of its most-visited branches. Since it opened in February 2019, the library has welcomed more than 157,000 patrons and has seen its collection grow to nearly 42,000 holdings.

Additional Information

Associate Architect: Skidmore, Owings & Merrill, Nia Architects
Engineer - Civil and Structural: Engage Civil Incorporated
Engineer - MEP: MEPIS
General Contractor: W.E. O'Neil Construction, Bowa Construction
Developer: Related Midwest
Landscape Architect: Site Design Group, Ltd.
Commissioning: dbHMS - Chicago
Sustainability: SOM
Acoustics: Shen Milsom & Wilke
Lighting: Zutale Design

New Little Italy Library Branch With CHA Housing 'The Renaissance Of Taylor Street,' Ald. Ervin Says

by Mauricio Peña for Block Club Chicago, 1/23/2019

(excerpts)

A new joint library and public housing development in Little Italy — a project that sparked controversy in the neighborhood — is being hailed as "the renaissance of Taylor Street" by Ald. Jason Ervin (28th).

In a statement, Mayor Rahm Emanuel said the city was "breaking the mold and uniting the strengths of our neighborhood libraries" with accessible affordable housing.

"Bringing …world-class libraries together with housing builds strong neighborhoods and provides a place for all community residents to gather, share and succeed," Emanuel said.

Emanuel said leaders from other cities like Houston and New York City have taken note of Chicago's combination library-affordable housing developments and are attempting to replicate the concept.

The mayor said the concept for a multi-use development like the Taylor Street came after a library in Back of the Yards burned down, and a new neighborhood library in that neighborhood was built on the first floor of a high school.

City officials first announced plans to build a new Taylor Street library in 2017. The inclusion of CHA housing in the development was controversial, and some residents complained that the development would spell trouble for Little Italy, as low-income tenants returned to the area.

At a community meeting in August 2017, some neighbors said that the project could cause crime to increase in the area and property values to plummet. And more 560 neighbors signed a petition asking the city to delay votes on the project so their concerns over the height of the building, breakdown of the mixed-income housing units and parking could be heard.

At the time, the library's developer said it would be impossible to build the library without the housing.

Library Commissioner Bannon said joint library and affordable housing development represented the "future of how we should be thinking about investment in neighborhoods, investment in communities, and doing those investments through our public libraries."

Chicago shows how public housing and libraries can coexist and be visually stunning. Now we need more of them
by Blair Kamin in Chicago Tribute, 8/22/2019

Article covers 3 projects:

- Taylor Street Apartments & Little Italy Branch Library
- Northtown Library and Apartments
- Independence Library and Apartments

(excerpts)

The library-housing combos are modest-sized structures rather than enormous complexes built to warehouse the poor. They're physically integrated into neighborhoods instead of isolated. And they're produced by skilled developers and architects, not hacks following orders that public housing shouldn't just be cheap — it should look cheap.

Located in the neighborhoods of Irving Park, West Ridge and Little Italy, all on the North and Near West sides, the library-housing fusions are offshoots of an innovative concept, "co-location," which joins a library with another type of building to lower construction costs and boost library attendance. Chicago is in the forefront of U.S. cities experimenting with the concept, already used in England, because of the political backing of former Mayor Rahm Emanuel.

"I love the place," said one Taylor Street resident, 62-year-old Ricarda Coleman, who formerly lived in the economically struggling Austin neighborhood. She goes downstairs to the library, she said, to get DVDs. Although some residents of Little Italy vociferously opposed the project, calling it a monstrosity, people in the neighborhood are "friendly," she said.

Sources

https://www.som.com/projects/taylor-street-apartments-and-little-italy-branch-library/

https://www.chipublib.org/about-little-italy-branch/

https://www.nytimes.com/2019/05/15/arts/design/chicago-public-housing.html

https://www.aia.org/showcases/6392661-taylor-street-apartments-and-little-italy-

https://blockclubchicago.org/2019/01/23/new-little-italy-library-branch-with-cha-housing-the-renaissance-of-taylor-street-ald-ervin-says-photos/

https://www.chicagotribune.com/columns/blair-kamin/ct-biz-cha-public-housing-and-libraries-20190822-boggg7ynjvdplok4cg377xee7m-story.html

Information collected July, 2022