

July 2005

ECONOMIC VITALITY

CHARACTER & LIVABILITY

THE SEATTLE PUBLIC LIBRARY CENTRAL LIBRARY: ECONOMIC BENEFITS ASSESSMENT

*The Transformative Power of a Library to Redefine
Learning, Community, and Economic Development*

IMAGE & IDENTITY

**Prepared for The Seattle Public Library Foundation
& City of Seattle Office of Economic Development**

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Executive Summary

As featured in media across the world, more than 25,000 people attended the much-anticipated opening of Seattle's new Central Library on May 23, 2004. In the months that followed, door count and circulation statistics described dramatic increases in use, Library staff strained to meet requests for tours and media shots, and anecdotes began to circulate about people traveling to Seattle solely to see the Library or about local restaurants extending their business hours to accommodate Library visitors.

Given the tremendous attention and activity associated with the new Library, the City of Seattle's Office of Economic Development and the Seattle Public Library Foundation commissioned this study to evaluate the implications for Seattle's economy. Key questions to be addressed included:

- What impact has the new Library had on local businesses?
- More broadly, how has the new Library affected the economic and cultural vitality of Downtown Seattle?
- How has the Library shaped the image Seattle projects to the outside world?

Through surveys of Library patrons and visitors and interviews with local business owners, developers and representatives of the tourism industry, this study confirms what had already been informally understood. By functioning as a highly effective information gateway, public space and tourist destination, Seattle's Central Library has become a significant contributor to Seattle's economy, a catalyst for Downtown revitalization and development and a new icon for the City.



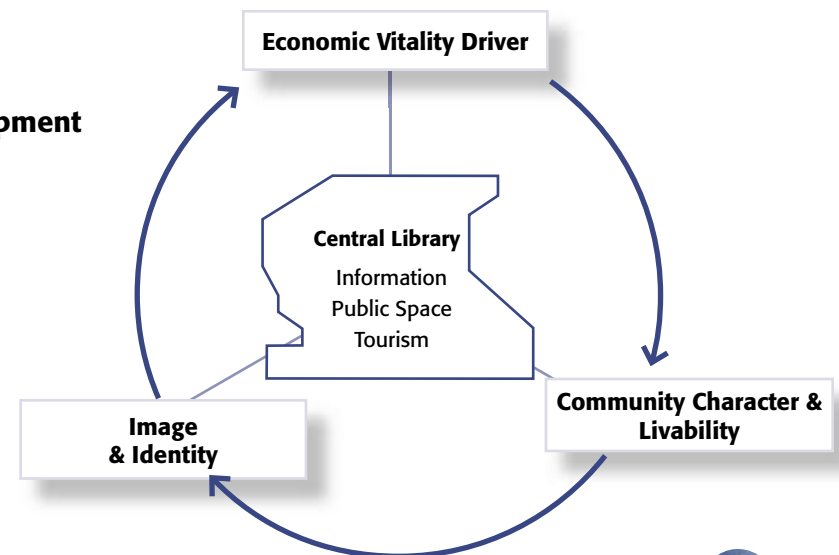
Increased Visitation Drives Benefits

More than 2.3 million individuals are expected to visit the Central Library during its first year of operation, including approximately 700,000 out-of-town visitors. As the new Library is drawing a greater number of visitors from a larger radius, these increases in activity drive the economic benefits the Library brings to Seattle, both in terms of additional spending and a more vibrant and active Downtown.

Economic Benefits of Seattle's New Central Library

For a city or region's economy to perform at its highest potential, three interlinked components must function in concert, as illustrated in Exhibit ES-1. This three-part framework was used to assess the economic benefits the new Central Library brings to Seattle, examining its contributions to economic activity, community character and livability, and image and identity. None of these components can individually capture the full value of the Library, as its greatest asset is its ability to bring multiple, inter-related benefits to the City's economy.

**Exhibit ES-1
Economic Development
Framework**



Key Findings

Economic Vitality

- **The Library is associated with \$16 million in net new spending in Seattle in its first year of operations** – equal to \$80 million for 5 years, \$155 million for 10 years, or \$310 million for the 20-year term of the *Libraries for All bond*.

Net new spending is defined as incremental spending above and beyond what the old Library would have generated. This figure is not inclusive of other economic benefits described in this report. While net new spending is the easiest of these benefits to quantify, this impact may be small compared to its other contributions to the Seattle economy, community character and identity.

- **Nearby businesses report increases in spending associated with Library visitors.** Restaurants, particularly coffee shops and “white table cloth” establishments, reported the greatest impacts. Hotels, particularly those hosting groups visiting the Library, also linked the new building with increases in business activity. Retail establishments were less likely to associate the Library with increased business.

- **Increases in the use of Library resources** contribute to learning, literacy, business productivity, personal and professional development, and individual livelihood, all of which boost the local economy.



Community Character and Livability

- **The Library increases the livability of Downtown** by functioning both as a Downtown branch library and a public space much like a park.
- **The increased number of Library visitors contributes to Downtown vitality and vibrancy**, making Downtown a more attractive residential and commercial market and furthering the Mayor's Center City Strategy to revitalize and increase the residential density of Downtown Seattle and nearby neighborhoods.
- **Developers and marketers are already using the Library to promote their properties.**
- Given its location amongst office buildings and government offices, **the Library is a vibrant anchor, knitting together the residential neighborhoods of Belltown and First Hill and retail concentrations in the Downtown shopping district and Pioneer Square.**

- Collaborating with partners such as the Seattle Art Museum, nearby theaters, Town Hall and others, the Library could be **an important contributor to repositioning Downtown as a cultural arts district.**

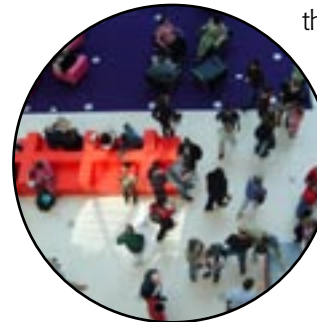


Image and Identity

- The Central Library is a compelling image, already **appearing as an icon** in magazines, advertisements, and promotions of Seattle.
- **As part of a network of Seattle attractions, the Library makes Washington a more attractive destination.** Incremental increases in tourism can create a huge increase statewide over time: a 1% increase in annual visitors to King County creates \$1 billion in new spending statewide over a 25-year period.
- **The Library attracts members of the Creative Class** by branding Seattle as a City where culture and public amenities are valued. Knowledge workers and the business sectors that desire ready access to this workforce are attracted to these community attributes. Impacts on the local economy are impossible to measure, but potentially enormous.
- **The Library contributes to Seattle's sense of pride and identity** as a forward-thinking and exciting place to live, work and conduct business. Recommendations



Recommendations

Seattle's new Central Library is a community asset with multiple benefits. While SPL has an interest in boosting use of library resources, increased visitation, particularly by non-residents, may be seen as increasing the system's costs for staffing, maintenance and informational materials while not advancing its core mission. Maximizing the Library's benefits requires a sharing of these costs and a deliberate, strategic effort by stakeholders benefiting from the Library's presence, including the City, Downtown businesses and trade associations. Only through a coordinated community effort will the Library achieve its enormous potential.

SPL should continue to focus on being a great library. The benefits described in this report are driven by the Central Library functioning well in all of its core capacities as a library. Its roles as a tourist attraction, amplifier of Downtown vitality, and Seattle icon are linked to and dependent upon this core mission. The Library will best deliver the many benefits it brings to Seattle by continuing to be an excellent library, investing in technology, books, and skilled staff.

In some cases, these recommendations address actions that can be taken by Seattle Public Libraries. In other cases, the economic benefits accruing to the City would most appropriately be encouraged through collaborative relationships with other parties that benefit from the Library's presence.



Collaborative Effort



Seattle Public Library

Open it up. A theme of the following recommendations is to continue to "open it up" by increasing the visibility, attractiveness, and accessibility of the building, particularly relative to mainstream audiences

Recommended Action Strategies to Enable the Library to Reach its Full Economic Potential

Focus on Being a Great Library



- Continue to partner with public and private funders to build excellent collections.



- Keep the facility attractive and well-maintained.

Increase Access to the Library



- Expand operating hours during weekday evenings and weekends.



- Extend garage hours to allow parking before the Library opens and after the building closes.



- Recognize and be prepared to accommodate the higher proportion of out-of-town visitors on weekends.



- Actively promote the rental of Library facilities for public use.

Make Improvements to Draw People in off the Street



- Add Downtown signage around to guide visitors to the Library and better signage around the Library to draw in casual visitors.



- Fully utilize coffee cart services.



- Use sidewalk placards to promote art displays and special events.



- Promote the Library as a place to stop over during public transit and a place to go for lunch time relaxation and enjoyment.







- Improve signage to draw people into parking garage.









- Develop image of the Library as a "third place" by training all staff to provide great customer service.





Market to the Regional Community

-  Continue to hold special events in evenings and weekends to boost Downtown liveliness during non-business hours.
-  Expand and promote the Library's unique resources that have regional appeal such as the Seattle Room, the genealogy library, and the collection of aviation history resources.
-  Develop innovative uses of the Library, such as weddings, private parties, and tour stops.
-  Develop print materials for tourists.

Collaborate with Businesses and Attractions

-  Encourage Downtown businesses to offer promotions to Library patrons.
-  Work with Seattle's Convention and Visitors Bureau and others to feature the Library as part of a dense collection of attractions in and around Downtown Seattle.
-  Ensure that the Library is featured on locally produced maps of Downtown and encourage inclusion of the Library in travel guides.
-  Be an involved and proactive member of the group repositioning Downtown as a cultural arts district.
-  Partner with arts organizations and businesses to sponsor evening and weekend programs that appeal to a wide audience and compliment other Downtown attractions.
-  Recruit a loaned marketing executive from the private sector to develop the Library's niche within other Downtown attractions.

Promote the Image of the Library

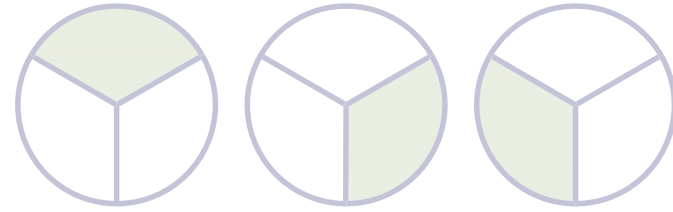
-  Make Library images easily accessible and allow their use in marketing materials.
-  Provide ready-made descriptive text of the Library for use in marketing materials: background, architecture, history, factoids.
-  Work with media groups to promote use of the Library in commercial photo and film shoots.
-  Offer more goods with the Library image in the FriendShop.



THE SEATTLE PUBLIC LIBRARY CENTRAL LIBRARY

ECONOMIC BENEFITS ASSESSMENT

The Transformative Power of a Library to Redefine Learning, Community, and Economic Development



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I. Introduction

The impetus behind this economic benefits assessment of Seattle's new Central Library was a growing collection of anecdotes by Library staff and proprietors of restaurants and hotels located near the Library. The dramatic new building, functioning as an architectural attraction as much as a working library, seemed to be attracting visitors from all over the world.

- "I've heard things like this over and over and over:
 - 'This is the first stop on our tour of Seattle.'
 - 'It's what brought us to Seattle; we wanted to see your new building.'"
- "I had some German-speaking young men in their 20's who were here on a cruise ship and could go on an Argosy tour, parasailing, or to the public library and decided to come here."
- "I speak with a lot of people who come up to me and begin with, 'I work at the library in City X and I just had to come see this place.'"
- "A retired librarian and his wife were visiting from London. He insisted on staying in a hotel across the street just so that he could be very close to the Library. They are supposed to visit their children who live in Bellevue, but that's been delayed."



This study was sponsored by The Seattle Public Library Foundation and the City of Seattle's Office of Economic Development. It was designed to assess whether the Library is having a significant impact on Seattle's economy. As significant an impact to Seattle's economy as has been found, additional work could be undertaken to more fully develop strategies and partnerships to maximize the positive benefits of the Library.

Key questions to be answered in the analysis are:

- *Are local businesses experiencing a positive economic impact due to increased visitation to the Central Library?*
- *More broadly, how has the new Library affected the economic and cultural vitality of Downtown Seattle?*
- *How has the Library shaped the image Seattle projects to the outside world?*

Quantitative and Qualitative Approaches to the Analysis

A broad mix of quantitative and qualitative inputs, including surveys of patrons and businesses, interviews, a survey of comparable libraries and cultural facilities and a literature review of studies which value the role of libraries as an information resource contribute to this comprehensive review of the Library's impacts. This study attempts to quantify economic impacts of the Library wherever possible, and where dollar amounts are not possible to determine, an effort is made to qualitatively assess impacts as more or less significant.

Report Organization

This study assesses the impacts of the Library on three interrelated components of economic development: business growth and economic activity; community character and livability; and community image and identity.

The report is organized in the following sections:

- **Section II** provides an overview of the history of the Seattle Public Library system and the three Central Libraries that have occupied the space at 1000 Fourth Avenue, as well as a description of the Library's current and previous hours of operation.
- **Section III** establishes the three-part framework by which the impacts of the new Central Library are assessed.
- **Section IV** provides an overview of how the opening of the new Central Library has affected circulation and door count statistics at the Central Library and system-wide.
- **Section V** describes the Library's impacts on Seattle's economy, measuring spending by visitors to the Library. The value of the Library as an information resource is also addressed.
- **Section VI** presents the value of the Library in terms of the enhanced vitality of Downtown Seattle and nearby neighborhoods.
- **Section VII** describes how the Library contributes to Seattle's image and identity as an attractive tourist destination and as a literate, forward-thinking City.
- **Section VIII** presents recommendations for maximizing the positive impacts and benefits of the Library.



II. History of the Seattle Public Library System and its Central Library

More On the History of Seattle Public Libraries

The Seattle Public Library System (SPL) was established as an official City department in 1890, less than thirty years after the City's incorporation. After suffering financial shortages and several short-lived locations, in 1899 the collection settled in the Yesler Mansion. This stay came to an unfortunate end in 1901, when a fire burned the library to the ground.

The first Seattle Central Library at 1000 Fourth Avenue opened in 1906. Following the 1901 fire, SPL appealed to philanthropist Andrew Carnegie to be included in his innovative vision for libraries across the country. With Carnegie's agreement to give \$200,000 for the building, SPL purchased the Library's current Downtown site for \$100,000. In 1906, the 55,000 square foot Carnegie Central Library opened its doors. In that year, the system had more than 22,000 card holders, approximately 15% of the City's population.

In 1907, after Seattle annexed Ballard, SPL began expanding into Seattle's neighborhoods by opening the first branch library. Through further Carnegie donations, six more branches were established. With continued growth over the past century, SPL will have 27 branches by 2007.

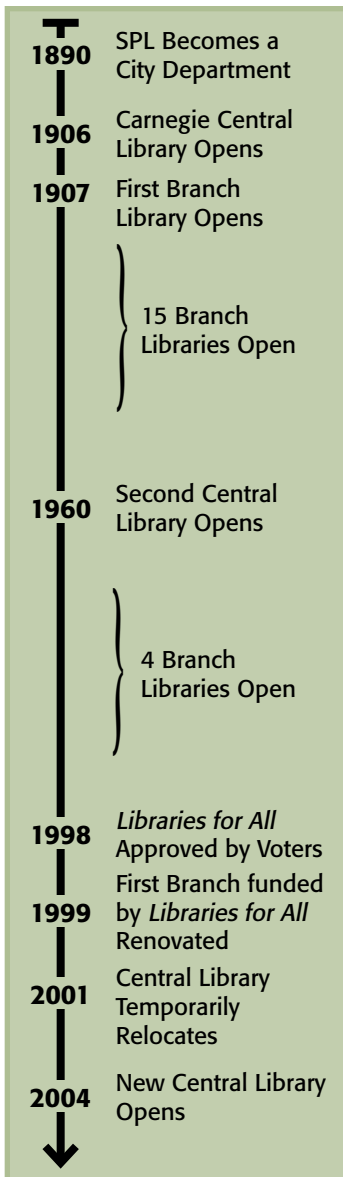
By 1945 the Carnegie Library was severely overcrowded and in 1960 Seattle's second Central Library was completed. With the help of a number of support organizations, including the Friends of the Seattle Public Library, Seattle voters passed a 1956 bond issue in an election with the highest voter turnout in Seattle history. Featuring an

The Seattle Central Library has been a key Seattle institution for a century. Three libraries and one hundred years in the same Downtown location on Fourth Avenue have contributed to one of the nation's strongest public library systems. This system has twice seen support of publicly approved bond measures, including the *Libraries for All* program, the largest library bond in U.S. history at the time.

***Libraries for All* is transforming neighborhood branches across the City.** In 1998, Seattle voters approved the \$196.4 million bond measure, with funds dedicated to each of the system's branches and construction of Seattle's third Central Library building.

At the time of this report, 13 of the 28 planned *Libraries for All* projects have been completed. Branches have seen renovation, expansion, and complete rebuilding, and three new branches will be constructed. Each of these efforts takes inspiration from the inclusive nature of the *Libraries for All* program, which integrates community identity into library design.

***Libraries for All* results in a dynamic new Central Library.** With the passage of *Libraries for All*, conversation focused on a replacement for the City's aging 1960 Central Library. While a number of sites were considered, the familiar location on Fourth Avenue – home to the Central Library for the previous 99 years – was determined to be the most advantageous. From July 2001 to April 2004, the Library was temporarily housed in the Washington State Convention and Trade Center, while the new building was built. The new Library opened on May 23, 2004, with more than 25,000 people in attendance. Construction of the Central Library totaled \$155.5 million, plus \$10 million for the temporary Library. Funding came from *Libraries for All* and a fundraising campaign to which more than 22,000 donors contributed \$83 million, including \$14.3 million directly to the new Central Library.



internationally acclaimed mixture form and function, and a mission to support local arts and artists, the 1960 Library was embraced by City residents. When this second Central Library opened on Fourth Avenue, system-wide cardholders had grown to more than 260,000, just under half of the City's population.

After three decades, the 1960 Library had reached capacity and was deteriorating.

Seattle's booming economy in the early 1990s helped inspire a vision for a new Central Library and a revitalized system to better serve City residents. While in 1994 Seattle rejected an initial bond issue, under the leadership of new City Librarian Deborah Jacobs, SPL successfully proposed the *Libraries for All* program. The initiative's goal was to carry out a system-wide overhaul, doubling the square footage of neighborhood branches across the City, as well as constructing a new Central Library.

The campaign reminded Seattleites of the importance of libraries both for information access and as a public and civic space. Public meetings turned into celebrations. "A good library system is not a luxury," stressed one speaker, "it's a necessity."

Exhibit 1

After 100 Years and Three Buildings the Central Library Remains at the Center of Downtown Seattle

	1906 Building	1960 Building	2004 Building
Opened	December 19, 1906	March 26, 1960	May 23, 2004
Location	1000 Fourth Ave.	1000 Fourth Ave.	1000 Fourth Ave.
Cost	\$220,000	\$4.5 million	\$155.5 million*
Size	55,000 s.f.	206,000 s.f.	362,987 s.f.
Public Parking	0 s.f.	0 s.f.	49,000 s.f.
Capacity (Books)	137,941	900,000	1,450,000+
Architects	Peter J. Weber of Chicago	Leonard Bindon and John L. Wright of Decker, Christiansen & Kitchin	Rem Koolhaas of OMA and LMN Architects
Opening Day Attendance	1,000	5,000	25,000
* Plus \$10 million for construction of the Temporary Library			

Source: Seattle Public Library and Berk & Associates, 2005



1906



1960



2004

Exhibit 2 Project Timeline: *Libraries for All* Involves System-Wide Improvements

1999	NewHolly (19)
2000	Wallingford (28)
2001	
2002	Delridge (8)
2003	Capitol Hill (6)
2004	Central Library (1) Columbia (7) Beacon Hill (4) North East (20) High Point (13) West Seattle (29) Green Lake (11) Rainier Beach (23)
2005	Greenwood (12) Ballard (3) Fremont (10) Lake City (15) International District/Chinatown* (14)
2006	Douglass-Truth (9) Montlake (18) Northgate* (21) South Park* (25) Southwest (26)
2007	Broadview (5) Madrona-Sally Goldmark (16) Magnolia (17) Queen Anne (22) University (27)

Timeline Undetermined

Sand Point (24)

Unaffected by *Libraries for All*

Washington Talking Book and
Braille Library (2)
Mobile Services (30)



*New Branches Made Possible by *Libraries for All*
Number Indicates Location on the Map

Source: Seattle Public Library & Berk & Associates, 2005

An Intense Focus on Design for an Important New Building

After an extensive international search, the Library Board selected Dutch architect Rem Koolhaas in a joint venture with Seattle's LMN Architects to design the new Central Library. The result was an adventurous design, described on the SPL website as "an avant garde symphony of glass and form which innovates form and function."

Unlike many contemporary building designs, the Central Library was designed from the inside out. Its foremost intent is to reimagine how libraries could and should work best. The building was designed to be state-of-the-art with features such as Tech Logic, an automated book conveyance and sorting system, and compatibilities for wireless communication among some Library staff members. The building achieved a Silver Leadership in Energy and Environmental Design (LEED) certification for use of a sustainable site, incorporating water and energy efficiencies, recycling and use of recycled materials, and for promoting a quality indoor environment through design and materials. The building is one of 43 Silver LEED certified facilities in the country.

The Library's Design Integrates the Multiple Functions of a Library

Libraries serve as meeting places, community centers, and information gateways. Koolhaas, Library Board members and administrators shared a vision for a highly functional building with a design that would maximize the Library's function as an information resource, as well as its role as a Downtown public space. A deliberate decision was made that the building's exterior should be second to the functions the building serves, leading to its asymmetrical shape and unusual overhangs. Wedding design to

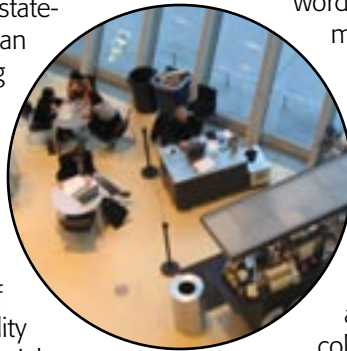
function also reflects the Library's impacts on Seattle's economy: its impacts are maximized when it serves its multiple functions most effectively.

1. The Central Library Prioritizes Public Access to Information

Our economy is increasingly focused on services, information and knowledge, and access to information is critically important. The Library provides access to information through printed word, multi-media, or the Internet. By providing computer terminals, the Library enables public access to email communications and word processing capabilities for those without other means. The Library is also home to unique collections of resources than cannot be found elsewhere such as the Seattle Room, the genealogy room, and the collection of aviation history resources.

The design of the new building represents a tremendous increase in accessibility for patrons. In the 1960 building, approximately one-third of the collection was directly available to the public, with two-thirds of the collection requiring 24 hours to several days for retrieval. In the new building, approximately 75% of the collection is directly accessible.

The Book Spiral is fundamental to providing patrons easy access to information resources, laying the entire non-fiction collection out in an uninterrupted chain. This design represented a fundamental change in the way the Library was organized and operated, eliminating the practice of creating special collections by gathering together books on a particular topic or theme. Previously, there were 80 such collections.



The Mixing Chamber is another important design feature, providing easy access to reference librarians and 130 computers equipped with basic applications and Internet access. Another 400 computers, primarily for catalog searches and database use, are located throughout the building. These 530 machines represent a 650% increase beyond the 70 terminals in the old Central Library.

Users of the Central Library as an information portal range from casual, infrequent visitors to avid, regular users. These individuals may be in search of Internet access, books and magazines, or media such as video or audio recordings.

2. The Library is Welcoming Public Space

Libraries act as community gathering places for both informal and formal purposes. This function is actively promoted through the design of the Central Library. The 50-foot ceilings and wide open community space of the Living Room invite the public in, as do such features as the coffee cart, the Friends of The Seattle Public Library gift shop, tables for chess-playing and ample seating throughout. The use of glass walls creates an open and translucent feeling, as if the building opens out into the street and the street flows into the building.

People who use the Central Library as a public space include Downtown workers on a lunch break, Downtown residents, the homeless, chess-players, book club members, coffee cart patrons, meeting or event attendees, and even passers-through seeking escalator help in climbing from Fourth to Fifth Avenue.

"I'm homeless and it's a nice, warm place to go. I read and stay out of people's way."

Central Library Patron

"It's a nice place to come: with an extra 30 minutes in my schedule, I chose to come here rather than walk around outside on this beautiful day."

Central Library Patron

3. The Central Library is a Compelling Destination

A portion of those who pass through the Library doors, including Seattle residents and out-of-town visitors, are drawn to it as a destination. The building's unique architecture and interiors, publicized via the broad media coverage it has garnered, draws people to Downtown Seattle to experience the Library firsthand.

People who use the Central Library as a destination include individuals, families, and groups from Seattle, the local region, or the national and international scene. Some of these visitors might have professional interest, such as architecture or library science, while others are simply curious.

"I'm a huge fan. It's democracy in action. I teach history, and I can say this is the purest example of democracy I can find: free, easy access to so much information!"

Central Library Patron



The Library's effectiveness in fulfilling these multiple functions as an information portal, a public space and a compelling Downtown destination, make it a valuable economic development asset.

Budget Cuts have Reduced the Library's Operating Hours in Recent Years

In response to annual budget cuts in effect since 2001, The Seattle Public Library has reduced operating hours at the Central Library and all branches in the system, in addition to making non-personnel cuts and reducing the amount spent on collections. Both the 2002 and 2003 budgets necessitated closing the entire Library system for two non-contiguous weeks.

The Central Library's current operating hours, totaling 58 hours per week, are shown in Exhibit 3. Prior to the reduction in operating hours imposed in 2001, the Central Library was open 70 hours per week, from 9:00 am to 9:00 p.m. Monday through Thursday.

Hours at branch libraries have been more significantly reduced, with most libraries now open from 1:00 to 8:00 p.m. Monday and Tuesday, 10:00 am to 8:00 p.m. Wednesday, and 10:00 a.m. to 6:00 p.m. Thursday through Saturday. Some branches are open 1:00 to 5:00 p.m. on Sunday, and others are closed.

Exhibit 3
Current Central Library
Operating Hours

Monday	10 am - 8 pm
Tuesday	10 am - 8 pm
Wednesday	10 am - 8 pm
Thursday	10 am - 6 pm
Friday	10 am - 6 pm
Saturday	10 am - 6 pm
Sunday	1 pm - 5 pm

Source: Seattle Public Library

Seattle Residents are Literate, Well-Educated and Love Books

Seattle is the second most literate city in America, according to a 2004 University of Wisconsin study of cities with populations over 200,000. "Seattle would have been number one," said researcher Jack Miller, "except for its aging and relatively under used libraries." This deficiency is rapidly changing, with the *Libraries for All* program revitalizing libraries across the City. Miller also confirmed what Seattleites have been saying for years: the City supports more bookstores per capita than any other city in the country.

Seattle has been a launching pad for numerous literacy and reading encouragement programs. In 1996, "America's Favorite Librarian," Nancy Pearl, launched *What If All of Seattle Read the Same Book*, a community-wide book club that has been duplicated in more than 50 cities across the country and internationally. Nancy Pearl has since become a cult hero, with two books – *Book Lust* and *More Book Lust* – and her own action figure.

According to the Census Bureau, Seattle has one of the highest rates of college education among large U.S. cities, with 49% of the population holding at least a bachelor's degree.

This passion for education and reading contributes to the community's overall quality of life and translates into support for the arts. This support benefits the Seattle Art Museum, the Seattle Symphony, and the Seattle Opera, which has the highest per capita attendance of any opera company in the country (Seattle Post-Intelligencer, July 1, 2004).



III. Framework for Assessing the Central Library as an Economic Development Asset

The Library provides benefits to Seattle in three categories, shown schematically in Exhibit 4. Each will be explored in this report. This three-part framework provides the basis for a comprehensive review of the Library's impacts on Seattle's economy.

1. The Library Promotes Economic Activity in the City

By drawing locals and out-of-town visitors through its doors the Library contributes new consumer spending to Seattle's economy. Actual use of the Library's resources has economic value as well, contributing to the City's literacy and the productivity of its businesses.



2. The Library Enhances Seattle's Character and Livability

The Library is a cultural asset for all Seattle residents. Moreover, the increased traffic drawn to Downtown, both by users of and visitors to the Library, enhances the vitality of Downtown. This boost in economic and cultural activity augments the desirability of Downtown Seattle and nearby neighborhoods for residential, retail, and commercial uses.



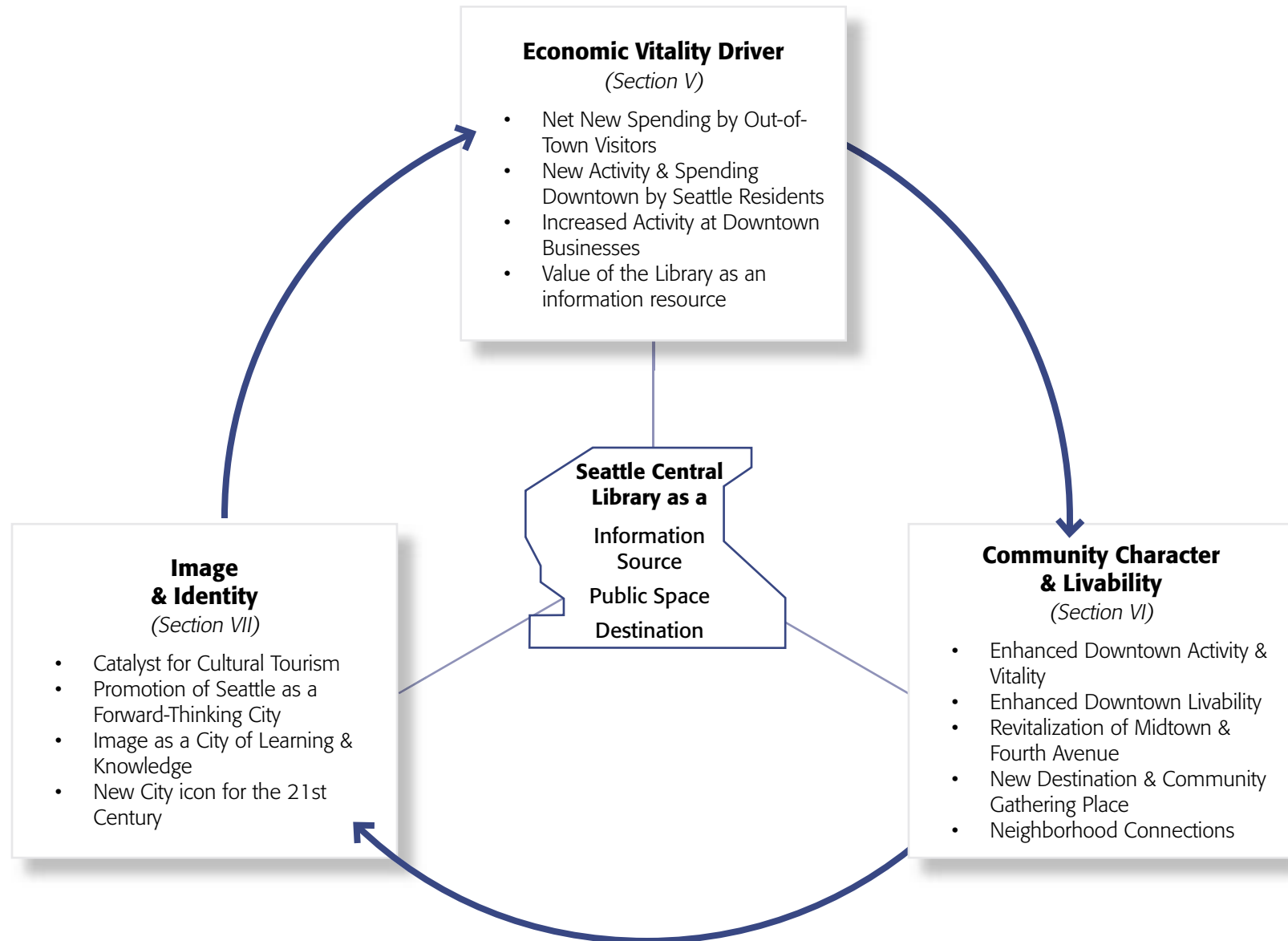
3. The Library Contributes to Seattle's Image and Identity

The Library is functioning as a new icon for Seattle, as reflected in its prominence in countless media pieces and advertisements. The Library's status enhances Seattle's image outside of Seattle and augments the sense of pride and identity for Seattle residents.



Nothing to hush up
The architect's office is open, people can't stop gawking at Seattle's Central Library. They love it. They talk it. They're posting their public tours that help explain the intriguing architecture.
A huge window connects to the street.
A Self-guided tour of the Central Library.
A Special section. Capture central library.

This feature article on Seattle's libraries ran in the March 24, 2005 edition of the *Seattle Times' Northwest Weekend*, more than ten months after the opening of the new Central Library.

Exhibit 4
Economic Development Benefit Framework

IV. Analysis of Library Usage and Traffic

An appreciation for recent increases in usage of Library information resources (measured here by circulation) and attendance (measured by door count statistics) is required to understand the benefits the Library brings to Seattle's economy. Additional traffic to the Library promotes the economy through the direct spending by visitors, as well as enhancing the vitality of Seattle generally and Downtown Seattle in particular. Additional Library usage also provides economic benefits through increased productivity and literacy.

Data Sources and Methodology

Monthly circulation and door count statistics were compiled by SPL staff. These data were analyzed for changes over time and for variations by season. Monthly statistical reports for the new Central Library, showing circulation and door count figures from June to December 2004 were also analyzed to understand variations by day of the week.

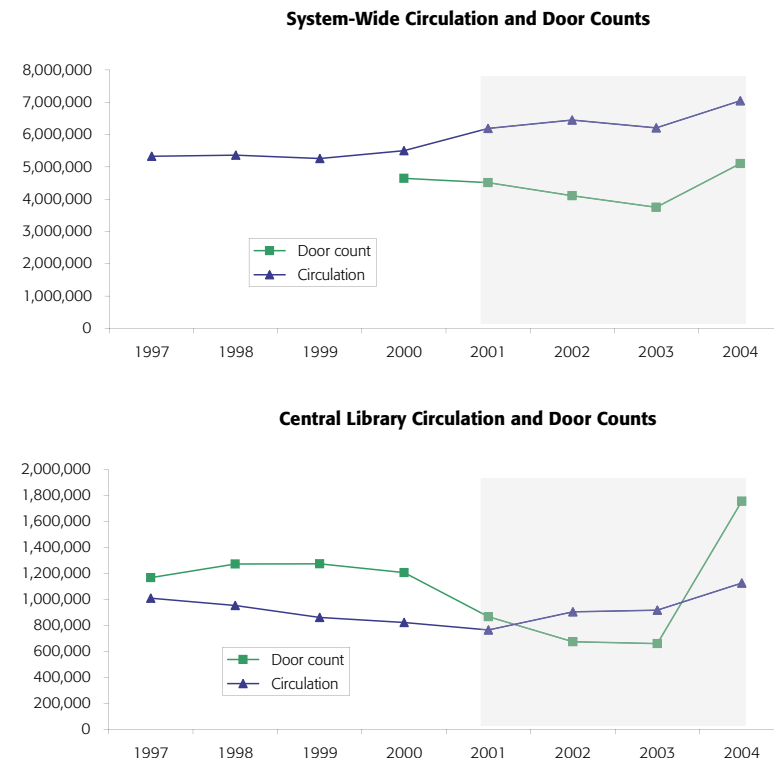
Key Findings

Library door count and circulation figures have increased significantly, both at the Central Library and system-wide.

- System-wide, the number of people entering a library, increased by 36% from 2003 to 2004.
- Circulation over the same period was up by 14% for the system.
- At the Central Library, 2004 door count was up 166% since 2003, and circulation increased by 23%.
- For June to December 2004, the first seven months the new building was open, the Central Library door count was up 299% and circulation had increased by 63%.

Recent growth in system-wide and Central Library usage statistics are illustrated in Exhibit 5.

Exhibit 5
Door Count and Circulation Trends
System-wide and at the Central Library



* Shaded area identifies the interval from July 2001 through August 2004 during which the Central Library was relocated to its temporary location.

Source: Seattle Public Library and Berk & Associates, 2005

It is important to understand these figures relative to system-wide improvements under *Libraries for All*. When the new Central Library opened, improvements had already been made to seven neighborhood branches. Under *Libraries for All*, branches have received renovations or expansions or have been rebuilt entirely, all of which have contributed to system-wide increases in library use.

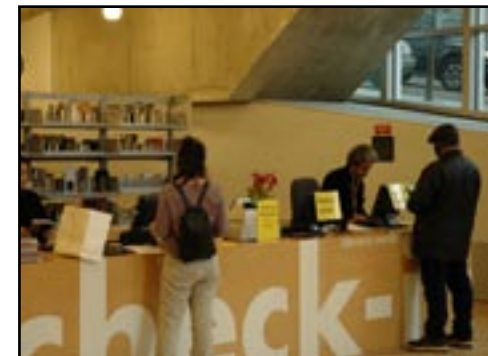
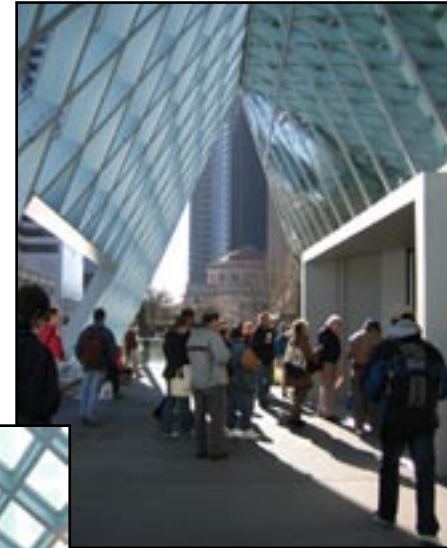
Recent increases follow earlier decreases in circulation and door count. Central Library door count figures decreased by 45% from 2000 to 2003 (though circulation increased by 12%). System-wide figures reflect a 19% decrease in door traffic from 2000 to 2003 and a 4% decline in circulation from 2002 to 2003.

There are multiple explanations for these decreases, including the Central Library's relocation to its temporary space from July 2001 to May 2004 and the disruptions to branch libraries associated with renovations. A significant increase in the use of on-line resources (both general Internet and on-line databases provided by SPL and others) also coincides with these decreases in library usage. Similarly, library users can – and increasing numbers do – search the catalog remotely and place holds on desired items, thereby reducing their trips to a library.

Despite disruptions in the system due to construction of the new Central Library and branch renovations, as well as a previously downward trend in usage, both circulation and door count statistics are dramatically up after the opening of the new Central Library. Users who might have left the system because of service interruptions and the availability of alternative on-line information sources have returned to the Seattle Public Library system.

"I am always amazed to see a hundred people standing outside the Library waiting to get in at 10 a.m."

David Dillman
Director of the Metropolitan
Improvement District and the
Downtown Seattle Association

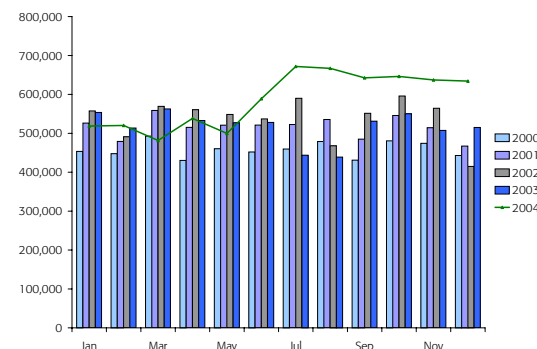


Trends: 2000-04 Circulation

Monthly data are shown in the accompanying charts to illustrate the impacts of the opening of the new Central Library mid-year in 2004. The obvious increases in May and June 2004 illustrate the tremendous level of interest in the new Central Library.

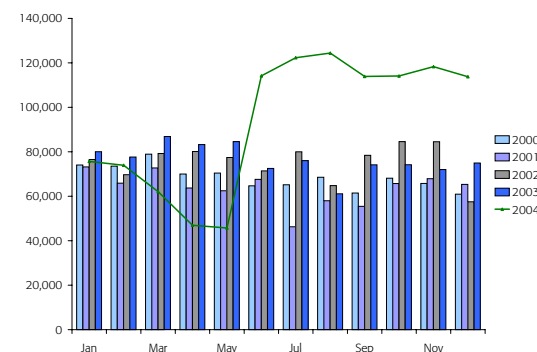
System-Wide

- System-wide circulation for 2004 is up 14% since 2003 and 28% since 2000.
- From 2000 to 2003, system-wide circulation increased by 13%, though from 2002 to 2003, a decrease of 4% was experienced.



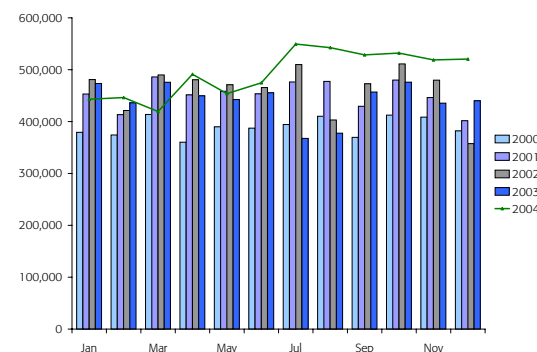
Central Library

- Central Library circulation for 2004 is up 23% since 2003 and 37% since 2000.
- These increases are despite a three-week closure during the relocation to the new building, which opened in late May 2004.
- With the move to the Temporary Library in 2001, circulation dropped 7%, though in 2003 this measure increased by 18%.
- For June to December 2004, the first seven months the new building was open, Central Library circulation increased by 63%.



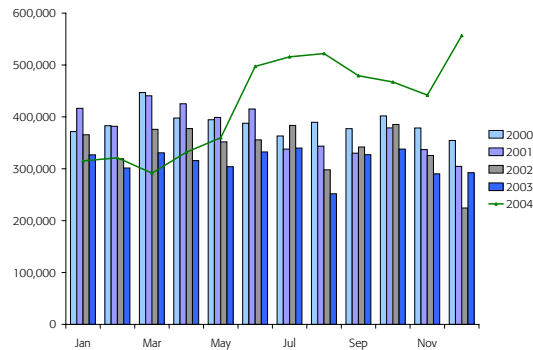
System-Wide Without the Central Library

- 2004 circulation for the branch libraries, not including the Central Library, is up 12% since 2003 and 26% since 2000.



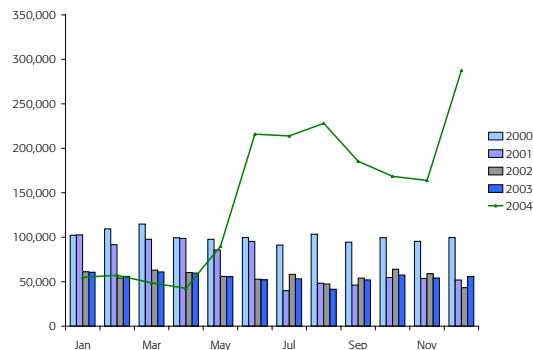
Source: Seattle Public Library and Berk & Associates, 2005

Trends: 2000-04 Door Count



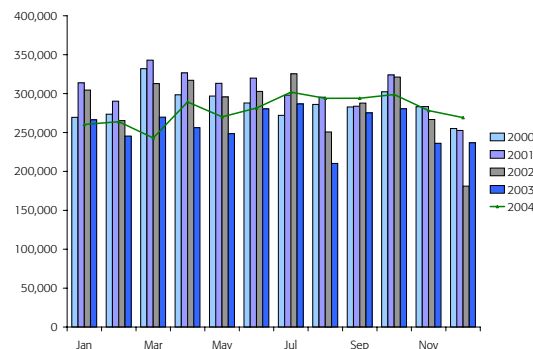
System-Wide

- System-wide door count for 2004 is up 36% since 2003 and 10% since 2000.
- From 2000 to 2003, system-wide door count decreased by 19%, with a 3% decrease in 2001, a 9% decline in 2002, and a 9% reduction in 2003.



Central Library

- Central Library door count for 2004 is up 166% since 2003 and 46% since 2000.
- With the move to the Temporary Library in 2001, door count dropped 28%, followed by an additional drop of 22% in 2003.
- For June to December 2004, the first seven months the new building was open, Central Library door count was up 299%.



System-Wide Without the Central Library

- 2004 door count statistics for branch libraries not including the Central Library are up 8% since 2003, though down 3% since 2000.
- The 2004 increase shows that while the Downtown Seattle economy is benefiting from the opening of new Central Library, traffic to branch libraries has not only not suffered, it has increased.
- From 2000 to 2003, door count dropped 10%, while circulation increased by 13% over this same period.

Source: Seattle Public Library and Berk & Associates, 2005

Significant Increases in Door Count and Circulation

Nearly 2.3 million individuals visited the new Central Library in the first full year (June 2004 to May 2005). This represents growth of nearly 250% over the same period the year before, as shown in Exhibit 6. Circulation, as shown in Exhibit 7 similarly grew by nearly 75%.

Exhibit 6
Seattle Central Library
Door Count: 2003-05

	2003/4	2004/5	% Growth 2003/4 to 2004/5
June	52,124	215,877	314%
July	53,188	213,913	302%
August	41,597	228,135	448%
September	52,006	185,310	256%
October	57,434	168,501	193%
November	54,177	163,859	202%
December	55,808	287,677	415%
January	54,902	137,300	150%
February	57,213	143,342	151%
March	48,663	195,317	301%
April	42,634	178,531	319%
May*	89,845	166,932	86%
Total	659,591	2,284,694	246%

* The total for May 2004 includes one week's attendance at the New Central Library, including approximately 25,000 attendees at opening day ceremonies.

Source: Seattle Public Library and Berk & Associates, 2005

Exhibit 7
Seattle Central Library
Circulation: 2003-05

	2003/4	2004/5	% Growth 2003/4 to 2004/5
June	72,513	114,133	57%
July	76,027	122,328	61%
August	61,118	124,418	104%
September	74,154	113,899	54%
October	74,202	114,100	54%
November	71,994	118,287	64%
December	74,973	113,760	52%
January	75,670	117,366	55%
February	73,922	101,880	38%
March	62,082	115,748	86%
April	46,962	139,016	196%
May	45,729	104,731	129%
Total	809,346	1,399,666	73%

Source: Seattle Public Library and Berk & Associates, 2005

Understanding the Composition of Library Users

Patron and Visitor Survey Methodology

A survey of Central Library patrons was conducted to gain insight into just who is contributing to the increase in door count figures for the Central Library. The results of this survey are used in the remainder of this report to describe and quantify benefits to the local economy.

A total of 189 randomly selected individuals were questioned in three rounds of surveying from September 30, 2004, to February 19, 2005. Recognizing the difference between weekday and weekend traffic, surveying in each round was done on both a Thursday and a Saturday. Similarly, each day of surveying involved two sessions: one at 11:00 a.m. and one at 3:00 p.m.. Surveys were administered verbally, at the top of the escalator connecting Level One and the Level Three Living Room.

Some key findings of the *Patron and Visitor Survey* are presented here and in Section V, where they are utilized in calculations determining new spending related to the Library. A more comprehensive review of Survey findings is presented in Appendix B.



The Survey has some important limitations. These are described briefly here and in more detail in Appendix B:

- The Survey's sample size of 189 individuals means that results are not statistically valid when conclusions are drawn from a sub-set of respondents, such as "non-residents coming to Seattle for the primary purpose of visiting the Library." Conclusions made from this data should be properly understood as reasonable calculations, but not statistically valid projections.
- As surveying was conducted over a five month period, the Survey does not capture seasonal variations over a full year, or changes that may occur following the Library's opening year.
- Members of visiting groups participating in public, group or special tours were not included in the Survey. Individuals visiting the Library for special events before or after opening hours were also not represented. Given the high share of non-residents on these tours, these populations would likely have increased the proportions of Library visitors and non-residents over Library users and Seattle residents.

Exhibit 8
Estimated Place of Residence for
Actual Distribution of Library Door Count

	Seattle Residents	Non-Residents	Total
Survey Respondents	66%	34%	100%
Estimated Actual Annual Distribution	69%	31%	100%
Estimated Makeup of Visitors, 6/04-5/05	1,576,439	708,255	2,284,694

Source: Berk & Associates, 2005

Exhibit 9
Survey Respondents by Place
of Residence and Purpose of Visit

	Seattle Residents	Non-Residents	All
Visiting the Library	6%	75%	30%
Library Use	94%	25%	70%
Total	100%	100%	100%

Source: Berk & Associates, 2005

Key Survey Findings

Approximately one-third of Library users and visitors are from out-of-town. In the *Patron and Visitor Survey*, 66% of respondents were Seattle residents and 34% were from outside Seattle. Given differences between weekday and weekend traffic, both in terms of numbers and proportion of Seattle residents to non-residents, this ratio cannot be directly applied to describe the makeup of all Library visitors. Approximately 75% of Library traffic occurs Monday through Friday, with non-residents constituting approximately 27% of weekday traffic and 42% of weekend traffic.

By applying these distributions, non-resident visitors are seen to comprise approximately 31% of all Library traffic or approximately 700,000 out-of-town visitors in the Library's first full year of operations, as shown in Exhibit 8.



Purpose varies by place of residence. As shown in Exhibit 9, 70% of all Survey respondents reported that they were there for "Library use," while 30% reported that they were "visiting the Library." The majority of non-residents (75%) described themselves as being visitors, while 94% of residents described their purpose for being in the Library as "Library use."

Library users and visitors come from all over the world. Slightly more than half of non-resident visitors came from Eastern Washington and other states. One-third of non-resident visitors came from the Puget Sound region, including Bainbridge (2); Bellevue (3); Edmonds (2); Olympia (2); Tacoma (2); and other cities (10).

Other domestic visitors were from California (7), Oregon (6), and other states (17). Those coming internationally came from Canada (3); Chile; England; Greece; Ireland; Israel; Korea; and Spain.

Seattle residents came from a number of neighborhoods, as shown in Exhibit 11.

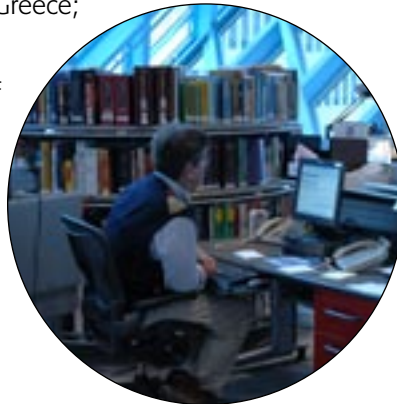


Exhibit 10
Survey Respondents
by Place of Residence

	Non-Resident Respondents	All Respondents
Seattle	N/A	66%
Puget Sound Region	33%	11%
Other Domestic	52%	17%
International	16%	5%

Source: Berk & Associates, 2005

Exhibit 11
Seattle Visitors to the Central Library
by Neighborhood of Residence

Neighborhood	Percent of Seattle Residents Surveyed
Downtown	21%
Capitol Hill	12%
Queen Anne	8%
West Seattle	7%
First Hill	6%
University District	6%
Other	40%

Source: Berk & Associates, 2005

A Selection of Libraries and Library Associations Which Have Visited the Central Library

Aarhus (Denmark) Library
Brisbane Australia Library
Brooklyn New York Public Library
Denver Public Library
Hawaii State Library
Japan Special Library Association
Jefferson County Library (Colorado)
King County Library System
Montreal Public Library
Multnomah County Library (Oregon)
New York Public Library
New Zealand Library
Oakland Public Library
Ohio College Library Center Board of Trustees
Ohio State Library Board
Olympia School District Librarians
Oregon Special Librarians Association
Rotterdam Library
San Diego Library
San Juan Library
Skagit County College
The Library Media Association
UCLA Library School
University of Washington Information School
University of Washington Libraries
Utrecht Library (Netherlands)
Uzbekistan Library
Vancouver B.C. Public Library
Washington D.C. Public Library

Tours, Special Events and Room Rentals Bring Large Groups to the Library

The number and frequency of group visits to the Library are significant enough to be noted by hotels and restaurants in a survey of businesses near the Library. Of particular note are groups associated with libraries or library science, which have come from all over the world to visit the Library and meet with Library staff. Because the individuals who participate in these visits were not interviewed in the *Patron and Visitor Survey*, they are not included in Section V in the calculation of total spending contributed to the local economy by Library visitors. These visiting groups, however, constitute a specific population which is spending noticeable amounts of money at local businesses.

A Partial List of Government Visits to the Central Library

California State Directors
City of Copenhagen Municipal Administration
French Consul and Ambassador
Mexican Consul
Pacific Northwest Intergovernmental Audit Forum
Representative Hans Dunshee
Seattle City Council
Seattle Parks Department
Seattle Public Schools
Senator Patty Murray and staff
Washington State Department of Transportation Research Office

Thirty-eight public and group tours are scheduled each week, supplemented by a large number of VIP and special group tours. Public tours provide general and architectural overviews of the Central Library for individuals and small parties, served on a first-come, first-served basis. Group tours accommodate groups from eight to twenty individuals. In addition, special tours are frequently provided for government groups, library groups, academic groups from all grade levels, senior citizens, non-profits, architectural firms and organizations, service clubs, book clubs, women's groups and others.

Special events and room rentals also draw large numbers to the Library. The Library hosts many special events including story times, author readings, computer classes, video screenings, poetry readings, and conversation classes for non-native English speakers. Organizations may also rent Library space to hold public and private events. In addition to meeting rooms, the Library's public spaces including the Auditorium, Mixing Chamber, and Living Room may be rented. By bringing people to the Library, each event hosted at the Library results in additional foot traffic and spending in Downtown Seattle.

Adopting a new philosophy related to room rentals, the Library recently hired Columbia Hospitality to establish a rental strategy. A competitive analysis was conducted, examining fees and facilities of other Seattle meeting spaces (focusing on those funded fully or in part by tax dollars). Rental fees were established in the mid-range of this market.



An on-line room request form is posted on the Library's website. With no other marketing, the Library has experienced interest from such organizations as Preston Gates & Ellis, Unico Properties, Expedia, the Seattle Times, and others since rentals became available January 1, 2005. With additional promotion, including a brochure now in the works, even broader interest is expected.

The Library has an outreach strategy aimed at reaching more diverse communities. Spanish and Vietnamese populations have been especially targeted, and special programming months have kicked off with celebrations including music, food, and art. According to SPL staff, participants include a large number of immigrants and refugees participated in these events. In addition, Library tours are now being offered in Spanish, with other languages to be offered in the future.

Exhibit 12
A Sample Week's Calendar of Central Library Special Events

The screenshot shows the 'Calendar of Events & Classes' page on the Seattle Public Library website. It features a sidebar with filters for categories and locations, and a main calendar grid for March 2005. The calendar lists various events such as 'Thrilling Tales', 'Frankenstein', and 'The Great Gatsby' across different days of the week.

Day	Event
Monday	Central - Thrilling Tales, A Storytime for Adults
Tuesday	Central - Thrilling Tales, A Storytime for Adults
Wednesday	Central - Thrilling Tales, A Storytime for Adults
Thursday	Central - Thrilling Tales, A Storytime for Adults
Friday	Central - Thrilling Tales, A Storytime for Adults
Saturday	Central - Thrilling Tales, A Storytime for Adults
Sunday	Central - Thrilling Tales, A Storytime for Adults

Exhibit 13
Flyers for Recent Special Events at the Central Library

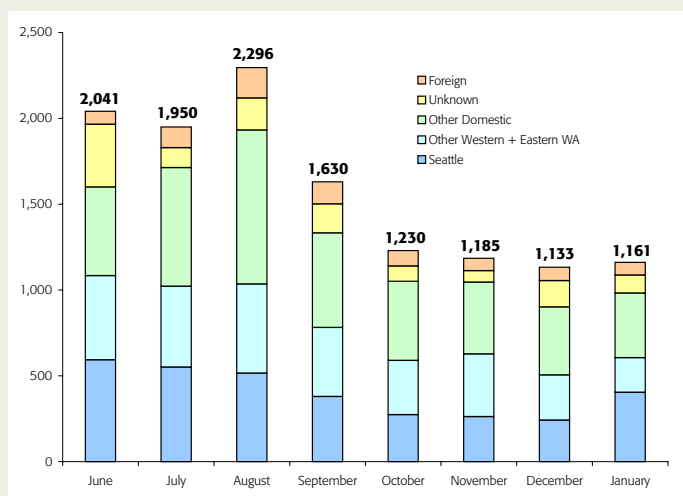


Public Tours

Each week, 18 general and 10 architectural tours of the Library are led by volunteer docents. General tours focus on Library services and functions, while architectural tours focus primarily on the structure and design of the building itself. Participants are limited to 20 and are accommodated on a first-come, first-served basis.

In the eight months from June 2004 to January 2005, nearly 11,500 people participated in the Library's public tours. Projected out over a full year, the total is expected to be more than 15,000 individuals. Exhibit 14 describes tour participants.

Exhibit 14
Public Tour Logs Registrations
June 2004 – January 2005



Source: Seattle Public Library and Berk & Associates, 2005

Percent of Total*				
Domestic		84%	6%	International
Percent Breakdown of Tour Participants				
Domestic		International		
Seattle	29%	34%	British Columbia	
Western Washington	28%	9%	Canada (other than BC)	
Eastern Washington	2%	6%	Germany	
California	10%	6%	Japan	
Other States	31%	45%	Other	
100%		100%		

*Ten percent of tour respondents were classified as "unknown."

Group Tours

Free tours for groups of eight to twenty individuals are scheduled nine times per week, with registration required two weeks prior to the tour. Groups which have special needs or cannot attend one of the scheduled tour times may be accommodated if arrangements can be made.

From November 2004 to February 2005, 144 group tours were conducted. Nearly a third of these were book clubs, women's groups, service organizations and other interested groups. Thirty percent were educational groups from elementary, middle, or high schools, or from institutions of higher learning. Other categories are shown in Exhibit 15.

Just over 50% of group tour participants came from Seattle. Nearly 40% came from the Puget Sound region, 10% came from elsewhere in the United States, and 2% were international.

Exhibit 15
Group Tour Participants
November 2004 - February 2005

Variety of interests	32%
Education	30%
Seniors	18%
Architecture Firm or Organization	8%
Librarians	5%
Corporate	4%
Government	3%
Total	100%

Source: Seattle Public Library, 2005

V. The Central Library as a Driver of Economic Vitality

The Library directly contributes to Seattle's economy through visitor spending in Seattle's restaurants, hotels, and retail establishments. This Section quantifies new spending in Seattle directly related to the new Central Library and presents findings of a survey of business owners. Quantification of the value of libraries as information gateways is also discussed.

The Library Functions as a Component in a Network of Attractions

"[The Salt Lake City library is] bringing in a significant number of out-of-town tourists, but additionally is drawing suburban visitors into the city center. It has become a reason to come into the city for cultural, information gathering, and civic needs."

Chip Ward
Assistant Director
Salt Lake City Central Library

The *Patron and Visitor Survey* findings show that the Library was the primary purpose for some trips by non-residents to Seattle and many trips to Downtown by Seattle residents. Survey respondents were asked how important the Library was in their trip decision-making. One-third (32%) of Survey respondents, including 41% of Seattle residents and 16% of non-residents, stated that the Central Library was the "primary reason" for the trip. Exhibit 16 presents the breakdown of responses

The *Patron and Visitor Survey* found that 55% of non-resident respondents would visit other Seattle attractions in addition to the Library, as described in Exhibit 18. These findings suggest that the Library functions more as a component in a network of Seattle attractions than as a primary draw for visitors coming from outside the Puget Sound region.

The *Patron and Visitor Survey* did not include participants in regularly scheduled Library tours or special tours, such as are held for visiting librarians, officials, or VIPs. Attendees at special events held at the Library were also not included. Due to these omissions, the actual percentage of visitors for whom the Library was the "primary reason" for their trip may be higher than is shown here. Later quantifications of the economic development impacts of the Library, which depend on the percent of out-of-town Library visitors for whom the Library was a "primary" or "important" impetus behind their trip, are therefore conservative.

Exhibit 16
Survey Findings: The Central Library's Importance to Trips to Seattle and Trips Downtown

	All Respondents	Seattle Residents	Non-Seattle Residents
Primary Reason	32%	41%	16%
Important	19%	23%	11%
Somewhat Important	13%	17%	5%
Not Important	32%	15%	64%
Unknown or not applicable	4%	4%	5%
Total	100%	100%	100%

Source: Berk & Associates, 2005

Interviews with staff at the Seattle Convention and Visitor's Bureau (SCVB) and the Downtown Seattle Association (DSA) corroborate this description of the Library functioning primarily as an additional destination in an existing network of attractions. Staff from the SCVB suggest there is a growing interest in the Library: "While inquiries are still considerably fewer in amount than, say, the Pike Place Market, our patrons are beginning to ask about the Library." In response, SCVB has used the Library in materials describing "what's new" in the City.

Exhibit 17
A Network of Seattle Attractions:
Destinations Named by Out-of-Town
Library Visitors

	Visitors Mentioning Attraction
Pike Place Market	16
Space Needle	7
Seattle Art Museum	6
Ferry boat ride	5
Pioneer Square	2
Sporting Event	2
Other*	22
<i>*Includes Boeing, Greenlake, Tacoma Glass Museum, UW, and other destinations</i>	

Source: Berk & Associates, 2005

The Library functions as an important regional tourist destination. Ten survey respondents classified as non-Seattle residents traveled to Seattle with the Central Library as their primary destination. Of these ten, two were from other states, drawn to Seattle with the primary purpose of visiting the Library. The remaining eight respondents were Puget Sound residents on day trips to Seattle, some to tour the Library and others to use its resources for in-depth research.

"People who go to a city usually have a list of ten things they want to see. It's more a cluster of grapes rather than one big apple. Seattle is working on it. We have the Market, the Space Needle, the Waterfront. After that there are other, smaller attractions. The Library is an important contribution, giving Seattle a greater density of attractions."

David Brewster
Executive Director
Town Hall Seattle



"It's not generated new business for us directly, but is an added attraction, along with the Space Needle and Pike Place Market."

Beeline Tours

Spending by Library Visitors Contributes to the Seattle Economy

While only one measure of the economic benefits provided by the Library, spending by Library users and visitors is an important measure to estimate. Visitors to the Central Library shop at local businesses, eat at Downtown restaurants and in some cases stay in local hotels. Applying the results of the *Patron and Visitor Survey*, the total 2.3 million Library visitors from June 2004 to May 2005 was composed of approximately 700,000 non-resident visitors and 1.6 million Seattle residents.

The *Patron and Visitor Survey* asked respondents to estimate the amount of money they would spend during their trip to Downtown Seattle. Exhibit 18 represents the expected spending for different categories of users. The majority of non-residents who report the Library to be the "primary reason" for their trip to Seattle are from the Puget Sound region and will not stay overnight in Seattle. As the Exhibit shows, the average spending for this group (\$58) is therefore less than for the category of visitor for whom the Library is an "important" draw (\$129), as this second group has a higher percentage of overnight stays.

Exhibit 18 Expected Spending by Residence and the Significance of the Library to Respondents' Trips

	Purpose at Library		
	Use	Visit	All
Seattle Residents			
Primary Reason	\$16	\$31	\$17
Important	\$14	NA*	\$14
Non-Residents			
Primary Reason	\$10	\$90	\$58
Important	\$50	\$160	\$129

Grey cells indicate values used in subsequent calculations of net new spending.

* No Survey respondents were in this category.
Source: Berk & Associates, 2005

A Total of \$16 Million in Net New Spending is Associated with the Library in its First Full Year

Total new spending by out-of-town visitors to the Library is projected to be approximately \$16 million during its first full year of operation. As shown in Exhibit 19, this economic impact estimate is comprised of two components: visitors coming to Seattle for the "primary" purpose of visiting the Library and those for whom the Library is an "important" consideration in their decision to come to Seattle. Expected new spending by these two groups in the Library's first year is shown in Exhibits 20 and 21.

Exhibit 19 Net New Spending by Visitors for Whom the Library was a Primary or Important Draw to Seattle

	Net New Spending
Primary reason	\$6,175,038
Important reason	\$9,439,948
Total first year	\$15,614,987

Source: Berk & Associates, 2005

Spending that would have been captured with the old library is not included. To arrive at this calculation of "net new" impact, the spending that would have occurred had the old library remained in place is subtracted from the total spending associated with the new building. In calculating the spending that would have occurred without the new Central Library, it is assumed that door count is not negatively impacted by the Library's move to a temporary location. The result is an estimate of net new spending in the Seattle economy by out-of-town visitors to the new Library.

This calculation is conservative for these reasons:

- The total does not include regional economic impacts associated with indirect or induced spending by businesses directly serving Library visitors or spending by the employees of these businesses.
- As the *Patron and Visitor Survey* did not include participants in Library tours or attendees at special events, the estimated proportion of non-resident to resident (Seattle) visitors is likely lower than actual.
- The *Patron and Visitor Survey* did not sample the makeup of Library visitors during the peak summer vacation period, when the ratio of out-of-town visitors to Seattle residents would presumably be highest

Will spending continue at this level?

Exhibit 22 shows forecasts of future economic activity spurred by the Library assuming a continuation of the current door count statistics and makeup of Library visitors (ratio of residents to non-residents and percentages coming to Seattle for the “primary” or “important” reason of visiting the Library).

Exhibit 22
Forecast Net New Spending
Assuming Constant Level
and Make-up of Visitors

Years	Net New Spending
1 Year	\$16 million
5 Years	\$80 million
10 Years	\$155 million
20 Years	\$310 million

Source: Berk & Associates, 2005

Two factors indicate it is possible to maintain or even increase this level of economic activity in the future:

First, the experience of comparable facilities indicates that high initial door counts do not necessarily decrease over time, and in fact are likely to increase. Libraries in San Francisco (built in 1995) and Phoenix (1996), experienced only minor declines after their opening rush, and have since experienced consistent, even increasing visitation, and circulation. The San Francisco Main Library had an immediate increase of 51% in door count and 46% in circulation; subsequently the library experienced an additional 9% growth in door count and 16% in circulation. These libraries also reported continued interest by visiting groups requesting tours of the facilities.

Second, the Library – and its partners with interest in promoting Seattle’s economy – can act to positively influence future economic activity associated with the Library. The Library attracts visitors with a specific interest in libraries or architecture, as well as a more mainstream audience. In addition to being featured in *The Journal of Architectural Education*, the Library has appeared in *Time Magazine*, and in addition to being visited by architects and library administrators, the Library is a destination for family outings. The “mainstreaming” of the Library is an underlying theme to many of the recommendations found at the conclusion of this report: make the Library relevant, attractive, and easily accessible. Implementation of these strategies will increase the Library’s appeal to a vast mainstream audience, fueling a continued benefit to Seattle’s economy.

A shift in Seattle resident traffic contributes to greater Downtown spending without detracting from neighborhoods. In addition to the net new contributions to the Seattle economy generated by out-of-town visitors, the Central Library creates new spending in Downtown by Seattle residents. While this does not represent a net gain for the Seattle economy, it represents increased business for Downtown merchants. As door count totals for branch libraries are also increasing (shown on page 14), this does not appear to be happening at the expense of Seattle’s neighborhoods.

Exhibit 20
Net New Spending Associated with Library Visitors
for Whom the Library was the “Primary” Reason
for their Trip to Seattle

New Spending: Amount Spent with New Central Library	
Total visitors	2,284,694
Number who are non-residents	706,993
Percent for whom Library is "primary reason"	16%
Total qualifying visitors	110,468
Projected spending per qualifying visitor	\$58
Total spending in new Central Library	\$6,407,124
Base Spending: Amount Spent without New Central Library	
Total visitors	1,200,000
Number who are non-residents	371,337
Percent for whom Library is "primary reason"	16%
Percent for whom purpose is "Library use"	40%
Total qualifying visitors	23,209
Projected spending per qualifying visitor	\$10
Total spending that would have occurred	\$232,086
Net New Spending = New Spending Minus Base Spending	
Net new spending	\$6,175,038

Assumptions

- Door count at Central Library would have been approximately 1.2 million without the disruption of a move to a temporary location.
- Visitors whose purpose is “visiting the Library” (not “Library use”) would not have come to Seattle with the old library.
- A one night stay is assumed for all visitors.

Source: Berk & Associates, 2005

Exhibit 21
Net New Spending Associated with Library Visitors
for Whom the Library was an “Important” Reason
for their Trip to Seattle

New Spending: Amount Spent with New Central Library	
Total visitors	2,284,694
Number who are non-residents	706,993
Percent for whom Library is "important"	11%
Total qualifying visitors	77,769
Projected spending per qualifying visitor	\$129
Total spending in new Central Library	\$10,032,231
Base Spending: Amount Spent without New Central Library	
Total visitors	1,200,000
Number who are non-residents	371,337
Percent for whom Library is "important"	11%
Percent for whom purpose is "Library use"	29%
Total qualifying visitors	11,846
Projected spending per qualifying visitor	\$50
Total spending that would have occurred	\$592,283
Net New spending = New Spending Minus Base Spending	
Net new spending	\$9,439,948

Local Businesses Report an Increase in Business Related to the Library

From December 2004 to February 2005, approximately 30 in-person and phone interviews were conducted with owners and managers of hotels, retail businesses, and restaurants in Downtown Seattle to assess the impacts of the Central Library. All businesses interviewed are located within a two-block radius of the Library.

The interviews focused primarily on the Library's impact on individual businesses surrounding the Central Library. The interviews included the following key questions:

- Has your business been impacted by the new Downtown Library?
- Have you changed your hours since the Library opening in May to respond to demand from Library patrons?
- Do you think extended Library operating hours would affect your business?

Exhibit 23 presents a list of the businesses interviewed for this study, and Exhibit 24 maps the location of these businesses relative to the Library.

Key Findings

There is consensus that the new Central Library is an economic benefit to Downtown businesses. Businesses in very close proximity to the Library were the most enthusiastic in their assessment of the Library's impacts. Restaurants and hotels within a block of the Central Library were excited about the Library's opening and its business development potential.

The Library helps anchor the Midtown and Fourth Avenue Business District. Since the new Library has opened, many business owners and managers have noticed a shift or return in pedestrian traffic and a change in the overall atmosphere in Seattle's Downtown financial

district, specifically south of the major retail center at Pike and Pine Streets and Fifth and Sixth Avenues. In recent years, the commercial and traffic focus in Downtown Seattle has shifted north and east from the financial district with the opening of Pacific Place, the reconstructed Nordstrom flagship store, the Banana Republic flagship store, the Gap, Old Navy, the Nike Store, and entertainment-oriented retail such as Gameworks and movie theaters. The Library was described as increasing foot traffic and vitality in the financial district, pulling some activity back to Fourth Avenue.

Some businesses were hesitant to point directly to the Library as a catalytic factor given the number of other developments that may have contributed to business growth. Many noted that because of the presence of the old Central Library, followed by the relocation of the Library to its temporary location from June 2001 to May 2004 and the disruptive three years of construction, it is difficult to separate out the net impacts of demand associated with the new building.

Exhibit 23
Businesses Interviewed Surrounding the Central Library

Hotels	Restaurants	Coffee	Retail
Alexis Hotel	Benihana	Seattle's Best Coffee	321 Hair
Crown Plaza Seattle	Blue Water	Specialties	Astoria Gifts
Fairmount Olympic Hotel	Chez Dave	Starbucks (4)	Bartell Drugs
Hotel Monaco	Community Grocery and Deli	Tully's	Bernards On Seneca
Hotel Seattle	Earth and Ocean		Coach
Hotel Vintage Park	JC Deli		Escada
Pacific Plaza Hotel	Marion Court (Café Zum Zum)		Figs Gift
Renaissance Seattle Hotel	Market Fresh		Film Stop (2)
Seattle Hilton	McCormick's Fish House		J.D. Cook Travel
W Hotel	Mel's Market		Jeri Rice
	The Original Deli		Kinkos
	Rice N Roll		Papyrus
	Ruth's Chris Steakhouse		R David Adams
	Seneca Deli		Rite Aid
	Troiani		Seneca Shoes
	Tulio		University Bookstore
			Young Flowers

Exhibit 24
Business Locations in the Vicinity of the Seattle Central Library



Different Business Types Report Varying Impacts

Restaurants have felt significant impacts with the Library's opening. Restaurants reporting significant benefits from the Library's opening include both higher-end, sit-down restaurants and coffee shops. Surrounding the Library there are also many small, relatively inexpensive take-out restaurants which report little to no impact from the opening of the Library as their primary clientele remains office workers.

Seattle's Best Coffee, located across from the Library on Fourth Avenue, reports a 40% increase in business since the Central Library opened, primarily due to increased business from Library employees. Other comparable restaurants, including Starbucks and Specialties Café and Bakery, have had similar experiences, but were unable to quantify specific changes.

In a June 2004 interview with the Puget Sound Business Journal, Dave deVarona, owner of two restaurants located across Fourth Avenue from the Library – Blue Water Taco Grill and Chez Dave – reported “business has soared 30% since the Library's debut.” He has expanded the restaurants' hours in response to traffic on Saturday and is opening on Sunday as well. Similarly, Tulio's management said the restaurant's opening hours were extended in direct response to demand from Library patrons.

White tablecloth restaurants in close proximity to the Central Library report an increase in tourist business with the opening of the Library. Tulio, McCormick's Fish House and five other higher-end restaurants report benefiting from groups visiting the Library and tourists in town in part either to see the Library or looking to dine close to the Library.

Restaurants in all price ranges expressed enthusiasm about the catering opportunities Library events could offer.

Some restaurants believe extended Library operating hours would positively affect their business. While the retail and hotel industries believe a change in Library hours would not affect business, restaurateurs would like extended Library operating hours on weekday mornings and Sundays. Restaurants that frequently serve Library employees, coffee shops and small retail establishments were interested in earlier weekday morning hours. Restaurants that serve Sunday brunch, such as Tulio's, Troiani, and McCormick's stated that expanded Library hours on Sundays hours may benefit their business.



Experiences in Other Cities

Other cities with architecturally and functionally innovative libraries have seen positive economic impacts in the businesses surrounding those buildings. Business activity has primarily grown in cafés and restaurants.

New businesses use their proximity to these libraries for marketing purposes. In Salt Lake City, one new condominium complex located near the central branch is called "Library Square Condos."

Appendix D provides additional information learned about comparable facilities.

Some Downtown Seattle hotels have seen a boost from Library-related traffic. Some hotels in close proximity to the Library report growth related to groups visiting the Library. Other hotels stated that if they had received an increase in business due to the Library, it was too diffuse to be traceable to the Library.

Retail has felt little impact from the Library opening. Retail businesses agree that the majority of their revenue comes from the Downtown area workforce, primarily high rise office staff. Of the 13 retail business interviews conducted, none had experienced significant economic impact from the opening of the Library. In an interview with the Puget Sound Business Journal, a representative from Film Stop, stated that it was "a bit like having Disneyland across the street" during its first month. However, in the six months between that interview and this report, Film Stop management reports a small impact: "Now, we get occasional customers from the Library."

Retail shops describe an increase in Library-related "window shoppers." This is especially true of the upscale retail cluster at the corner of Fifth Avenue and Union Street, including Escada, Coach, Louis Vuitton, and Jeri Rice who all report, "a small increase in store traffic" but not necessarily in revenues.

Gift shops and other stores with wider price ranges report the same increase in traffic and a small sales increase. A representative from Papyrus, a specialty paper products store, revealed "[beyond location inquiries] the most common activity we experience from Library patrons is a postcard sale."

The Library has Economic Value as an Information Resource

There is inherent economic value in functional libraries as an information resource. Libraries contribute to learning, literacy, business productivity, personal and professional development, and individual livelihood. Some of this value accrues to individuals who gain benefit from recreational use or access to library resources for professional or professional development purposes. Local businesses also benefit from the availability of library resources, in some cases avoiding the purchase of resources they would otherwise need to acquire independently, and in other cases, augmenting their productivity by using library resources.

Within the past ten years, a number of studies have been conducted to place an economic value on this usage of libraries. Appendix C summarizes studies reviewed for this report, including studies of libraries in Baltimore, Birmingham, Florida, King County, New York State, Pennsylvania, Phoenix, South Carolina, and St. Louis.

In these studies, a large number of library patrons are surveyed using a use or contingent valuation approach. To determine the value they place on library resources, patrons are asked how much they would be willing to pay for access to equivalent resources if the library did not exist, or how much they would be willing to accept to give up their library service.

Typical studies place value on uses by residential households, teachers and business. Exhibit 26 summarizes four studies available which provide detail findings, listing the value determined for different categories of library users.



These studies are not directly applicable to this study of benefits associated with the new Central Library.

These studies are useful to characterize the overall value users place on the functional role of library systems. They are less useful, however, in describing the incremental benefits that the new Central Library has provided. We know that usage of the Central Library and of the system as a whole has increased following improvements under *Libraries for All*, with circulation at the Central Library during its first seven months of operation 63% greater than the same period the year before. It would be impossible to quantify the incremental value of this increase in usage, however, without substantial direct surveying of users of the Library as was done to by the authors of the studies referenced in Exhibit 25.

Exhibit 25
Value of the Library as an Information Resource

	Value per Household	Value per Teacher	Value per Business
Birmingham	\$351	\$5,875	\$11,290
St. Louis	\$381	unknown	unknown
Phoenix	\$350	\$2,800	\$2,000
New York State	\$235	unknown	unknown
Average	\$329	\$4,338	\$6,645

Source: Berk & Associates, 2005

VI. The Value of the Central Library as a Contributor to Community Character and Livability

Rem Koolhaas and the Seattle Public Library not only built a repository for books and other media, but a new civic, cultural, and public space. Public access is absolutely central to the design and philosophy of the building. It is a structure which draws people inside and encourages them to stay. Incorporation of engaging art, the coffee cart and seating space located in the Living Room, as well as the ample seating throughout, encourages visitors to be comfortable in the space, facilitating a feeling of public ownership. The end of the prohibition against having beverages in the Library accentuates this sentiment, as does the very scale and feel of the building's architecture.

"It's a cultural magnet, packed every time I'm here. It's the temple of learning it should be."

Central Library Patron

Respondents to the *Patron and Visitor Survey* described the building as "user friendly," "spacious; you don't feel cramped." They "love the openness" and noted that it's a library you don't feel compelled to whisper in: "It's very accessible; obviously the designer loves people as well as books."

These features of the Library enable it to function as an active public space, similar in many ways to a park. Office workers come on their lunch breaks, passersby are drawn in for a rest, homeless individuals seek shelter from the rain or sun, and people literally pass through, using the escalators to ease the climb from Fourth Avenue to Fifth Avenue.

"I'm just stopping in after getting my hair cut. It's so beautiful in here on a sunny day!"

Central Library Patron

The Library Contributes to Downtown Livability

Downtown Seattle has a growing residential population base as part of its transformation from a retail and commercial center to an urban neighborhood and denser city. This continued transformation has been identified as a priority by Mayor Nickels as part of his Center City Seattle strategy which is currently addressing Downtown height and density, First Hill revitalization and other efforts. The Library is directly contributing to this revitalization effort by increasing the vitality of Downtown and making it a more attractive place to live.

The market is beginning to meet some of the demands of the growing Downtown residential population, including grocery stores and general neighborhood services. In the past, residents of Belltown, Pioneer Square, and First Hill have had to drive to grocery stores. Now, however, both QFC and Whole Foods are expanding to serve a growing population. The Seattle Center is now home to a Seattle public high school, the Center School. As the demand for neighborhood amenities from Downtown's increasing residential population grows, there is also a need for additional public and community space.

Twenty-one percent of Seattle residents responding to the *Patron and Visitor Survey* reported that they live in Downtown. The Central Library is not just a general public space for the City, but a principal public space for this growing Downtown population. The Library also functions, of course, as their main library, serving its neighborhood like any other branch location.

The Library is already being used to market Downtown livability. The General Manager of Harbor Steps, a downtown mixed-use development, described the new Central Library as part of a collection of attractions and amenities that make Downtown a desirable residential location. "The Library is one of the amenities we sell. It's part of our marketing plan as one of the features we market for both the Harbor Steps Apartments and our 28-unit B&B." He further added that he would use Library images in marketing materials if they were readily available, and that the Library image "positively, definitely appeals to our target demographic, just as Benaroya Hall, the Seattle Art Museum, and the Fifth Avenue Theater do."

The President of Williams Marketing, a firm which has marketed condominiums in Seattle for more than 20 years, stated that the new Central Library is "a contributing factor to making Downtown an attractive place to live." She too felt that the Library would be an appropriate marketing image, though noted that she hadn't yet seen it used as such.

"Seattle public architecture has never in the past quite hit the mark, but I think this does. It's exciting and bold."

Central Library Patron



The Library Knits Downtown Together, Facilitating Residential, Retail and Commercial Development

The Central Library is located in the midst of office space, banks, and government buildings, with the bulk of Downtown retail and residential activity occurring to the north and south. During daylight hours, the streets around the Library hum with activity as workers go to and from their places of employment. The Library contributes to this activity, and, importantly, amplifies and extends this dynamism by drawing in a variety of users during and after business hours, as well as on weekends.

Exhibit 26 shows the location of the Library, relative to the retail activity in the Downtown shopping district and Pioneer Square, as well as the residential centers in Belltown and First Hill. The activity surrounding the Central Library may contribute to pulling retail activity south of the Downtown shopping district. Bartell Drugs, which opened a store just across from the Central Library on the corner of Madison and Fourth Avenue, noted that the presence of the Library was “not the linchpin” in the decision to open this store, “but it was a contributing factor.”

“The Central Library can function as a fulcrum rather than the southern edge, leveraging traffic between the Downtown retail core and First Hill.”

David Brewster
Executive Director
Town Hall Seattle

The Library connects Downtown and First Hill. Seattle’s First Hill is poised for substantial urban infill development. Much of this development is expected to be residential. The President of Harbor Properties foresees a future in which First Hill’s “parking lots and vacant properties will be replaced with mid-height residential, with shops, retail, delis,

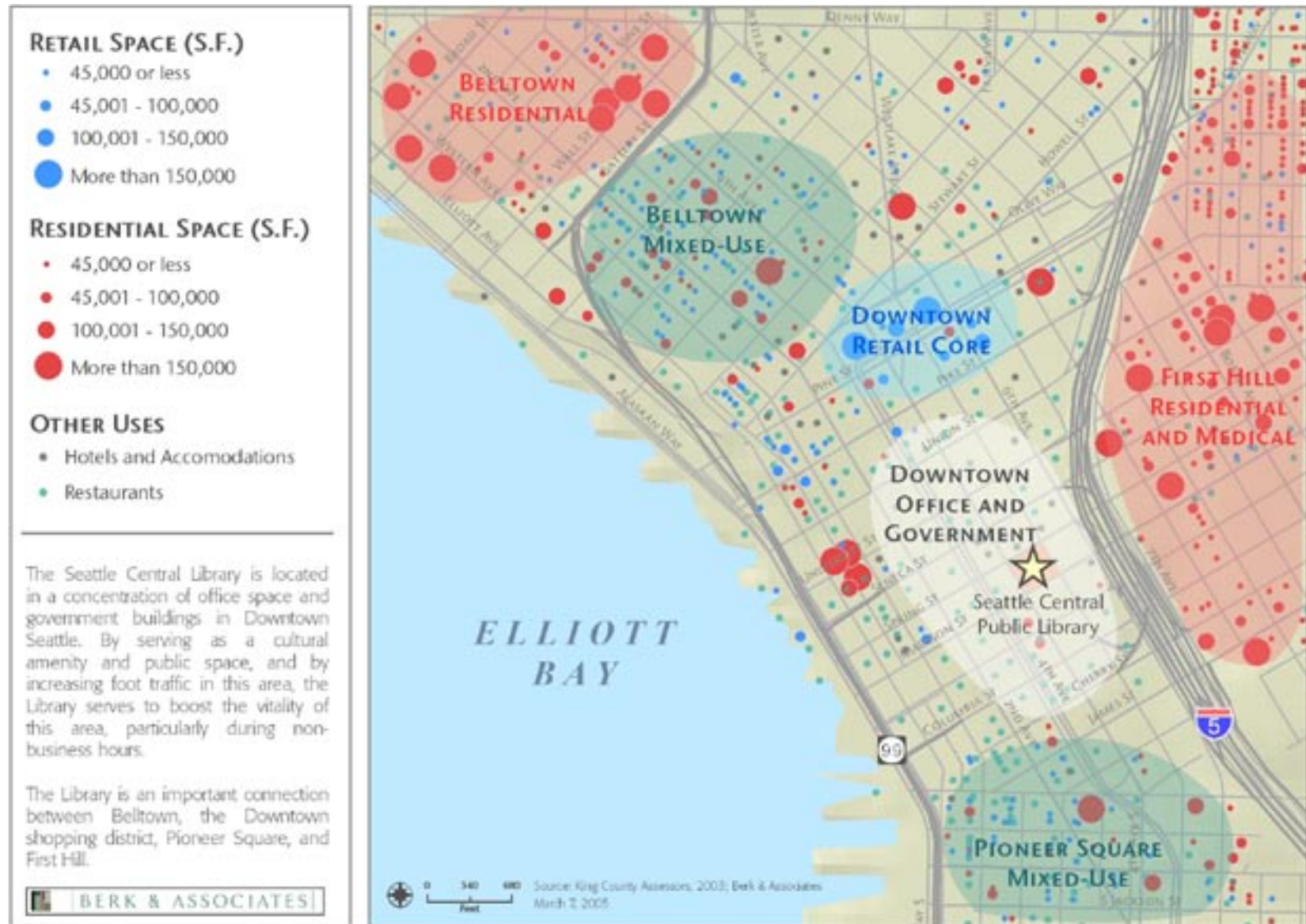


and groceries below.” Opus Northwest similarly sees an increase in the First Hill residential population. A company representative cites the neighborhood’s convenient access to the Central Business District, and the “huge number of jobs on the Hill.” These 22,000 jobs (City of Seattle, 2002) are primarily associated with the many medical institutions in the neighborhood, and create demand for affordable housing within walking distance of the facilities.

The President of Harbor Properties, engaged in three projects involving new construction on First Hill, describes the Library as “an anchor point,” noting that the connection between First Hill and Downtown is complicated by the presence of the freeway: “a physical and mental barrier.” He described the Central Library as “a great civic place of gathering more than a place you read books,” and expressed optimism that it would help make the Madison freeway crossing more vibrant day and night, weekday and weekend.

Opus Northwest is developing 200,000 square feet of Class A office space on First Hill, along with 200 market-rate apartments. A company representative noted that the Library “is a plus, especially for residential scale, but it is also an asset for office.” Referencing urban infill examples elsewhere in the world, he noted that a key ingredient of successful mixed-use development is a density of amenities and public spaces, together with access to jobs and transportation.

Exhibit 26 The Library Helps to Knit Together the Diverse Uses of Downtown



The Library Would be a Key Element in a Downtown Cultural District

The Executive Director of Town Hall Seattle spoke excitedly of the Library's potential role in creating a Downtown arts district. He described the effort as "repositioning Downtown as a place for people who live in Seattle. We can reclaim it from office workers and tourists as a cultural arts neighborhood, similar to Greenwich Village." The goal would be to animate Downtown, making it "strollable, vibrant" through cross-marketing the many cultural attractions of the neighborhood. Maps, banners, parking discounts, ticket sales, and joint promotions are all being spoken of collaboratively by representatives of the Seattle Art Museum, A Contemporary Theatre (ACT), Fifth Avenue Theater, the Paramount, the Seattle Symphony, local art galleries, Town Hall, Benaroya Hall, and others. "The Library would be Exhibit A: a place worth seeing itself, a good place to hang out, and a great setting for evening programs."

The economic value to Seattle of a vibrant Downtown cultural district would be enormous. Even incremental contributions towards making Seattle a more vibrant, culturally active city with a livable, vital Downtown make Seattle a more attractive place for tourists. Neighborhood appeal and "authenticity" are as attractive to tourists as to potential residents.

"It's fantastic! It enriches the cultural life of Seattle, making it more like a European city. Seattle could be the next Amsterdam. I appreciate that tax dollars were spent on such a project, and that it's located Downtown."

Central Library Patron



VII. The Value of the Central Library as an Enhancement to Image and Identity

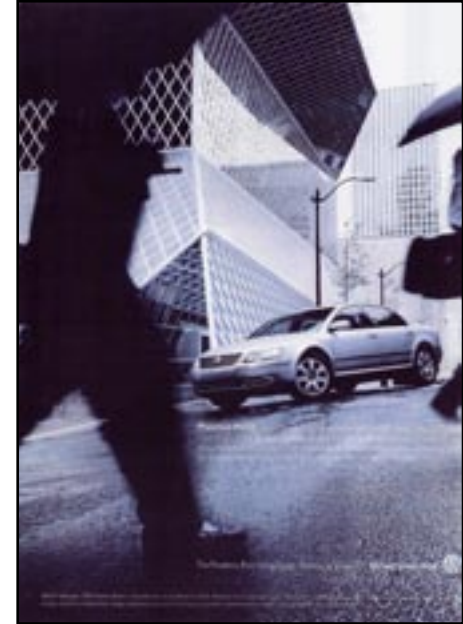
Media coverage of the Library has been extraordinarily high. Local media have featured stories on the Library in every phase of its development, from design to construction to opening, with the Seattle Post-Intelligencer running a special ten-page insert in its May 20, 2004 edition. National and international media have featured the Library as well, focusing primarily on the architectural features of the new building. Coinciding with the opening of the building, feature stories ran on National Public Radio and in the *New York Times*, *New Yorker*, *Wall Street Journal*, *Washington Post*, the *Chicago Tribune*, *Christian Science Monitor*, *Dallas Morning Post*, and *Philadelphia Inquirer*, as well as *Time Magazine*, *Newsweek*, *Sunset* and *Metropolis Magazine*. Specialized publications such as *American Libraries*, *Governing*, and the *Journal of Architectural Education* have also featured the building.

The Library suddenly has a “cool factor.” As a sure sign of popular excitement about the new building, *Esquire Magazine* listed “the opening of Rem Koolhaas’s long-awaited Central Library” as one of its 34 things to “be optimistic about in 2004.” *GQ* listed the Library as one of 25 structures every man should know. Libraries are now hip, and according to Kate Joncas, Executive Director of the Downtown Seattle Association, “The greatest economic development impact of the new Central Library is the coolness factor. It makes us cool on an international stage.”

Volkswagen featured the Library, though it was not named as such, as a backdrop in a print advertisement for its new Phaeton line, run on the back cover of the November 2004 edition of the *New Yorker*. This was clearly a case in which the physical design of the building was of primary importance. Similarly, the Macy’s Director of Corporate

Communications and Media Relations described the company’s decision to use the Library in a direct mailing piece as primarily driven by the “design lines, the architectural elements. We want an impactful image that represents the product well. A side benefit in this case, was we got to showcase an icon of Seattle.”

Seattle Public Library’s Communications Director described demand for use of the Library as a location for photo shoots as more than can be accommodated with existing resources. She noted that this level of demand has occurred with no marketing effort on the part of the Library’s part. With no staff dedicated to this function, she is forced to deny many requests, unable to capitalize on a revenue-generating activity that other libraries, including New York and Los Angeles, have tapped into.



Media Strategies in Other Cities

Other architecturally innovative libraries have developed strategies for cooperating with the media. Depending on the demand, some libraries have loosely-enforced policies while others have full-time film and media liaisons to develop and manage library exposure. Some libraries elected to charge fees for either all shoots, or, in the case of Salt Lake City, only shoots which are disruptive.

In every case, libraries’ primary concerns are that media requests do not disrupt library patrons and events, staff are properly treated and compensated, and that library administrators approve of the manner in which the library’s image is used.

Appendix D presents more information on this topic.



This ten-page fashion spread was featured in the February 2005 edition of Cargo.



This use of the Library's image in the Fall 2004 issue of Find! is interesting because the modern image of the Library is used in an unrelated piece about furniture stores in Seattle.

Other uses of the Central Library image to date include:

- The Seattle rock band the Presidents of the United States of America used the Library as a backdrop for a CD cover
- KING5 TV used the Library as a promotional shoot for its news anchors

The Central Library is clearly a 21st Century icon for Seattle and the embodiment of a whole new way of thinking about libraries.



The Library Enhances the Appeal of Seattle – and Washington State – as a Tourist Destination

Increasing King County tourism by 1% yields \$1 billion in new economic activity statewide over 25 years. Seattle functions as a principal draw and gateway for tourists to Washington State which competes for those visitors with other regional, national and international destinations. Not only does spending by visitors to Seattle have ripple effects throughout the Puget Sound region and Washington State, but many visitors to the City use it as a gateway to explore other regional destinations including Mount Rainier, the Olympic Peninsula and Mount Saint Helens.

The opening of the new Central Library therefore contributes economic activity Statewide, as do other enhancements to Seattle's attractiveness as a destination such as expansion of the Seattle Art Museum, the development of the Olympic Sculpture Park, and the potential for improved waterfront amenities in Downtown with reconstruction of the Viaduct.

Currently, the Seattle Convention and Visitors Bureau reports that King County attracts roughly 8.5 million overnight visitors annually, resulting in approximately \$3.8 billion in expenditures. The typical overnight visitor stayed five nights and spent about \$444 in King County. This spending in turn generates indirect and induced economic activity throughout the Puget Sound region and Washington State, resulting in a total of \$660 in new economic activity Statewide per visit.

For every 1% increase in overnight visitors to King County (equivalent to approximately 230 people per day) that \$660 per visitor turns into nearly \$1 billion of new economic activity over 25 years, and \$1.5 billion over 50 years.

The Bilbao Effect

Before 1997 when Frank Gehry's Guggenheim Museum opened, Bilbao was a bleak, industrial city that tourists avoided. Today Bilbao is one of the most visited cities in Spain and the Museum has attracted over six million visitors. The influx of tourism has transformed the City with investment into restaurants, hotels, theaters, and further civic and cultural projects. The Financial Times estimated that the Museum had generated 500 million Euros in economic activity for the region during its first three years, including the price of admission.

This burst of economic and cultural activity has been labeled The Bilbao Effect and civic leaders across the United States are trying to replicate its results by hiring innovative architects to seize the attention of a world-wide audience and advance their cities' economic and cultural vitality. Major cultural works projects in Baton Rouge, Cleveland, Cincinnati, Indianapolis, Milwaukee, Pittsburgh, and St. Louis, just to name a few, have recently attempted to leverage The Bilbao Effect to bring economic revitalization to those cities.

In many ways, the Guggenheim and the new Seattle Central Library are very different. Bilbao is an industrial city, with the Museum as its primary attraction. It has nothing like Seattle's network of natural and man-made attractions to draw tourists. Additionally, the Museum has been criticized for not functioning well as a museum, with the fantastic form of the building detracting from its functional performance, rather than enhancing its core mission, as is the case with Seattle's Central Library.





The Library is already appearing in travel guides for Seattle. A survey of printed and on-line travel guides finds that the Library is increasingly referenced in such material. Many travel and lifestyle magazines around the world have featured content on the Library. Interest in the Library may well build as a consequence of this exposure.

Tour lines report some interest. Interviews with managers of tour agencies such as Gray Line of Seattle, Show Me Seattle and Beeline Tours similarly report that they are receiving inquiries about the Library and that "It's definitely on our radar." While general tour operators are not yet including the Library on their tours, this could change as the Library's reputation spreads. Beeline Tours reported that some groups may visit the Library if it is of particular interest to them. A group of Chinese visitors, for example, visited the Library on two days of their stay in Seattle.



The Central Library was the winner of the 2005 Travel + Leisure Design Award for Best Cultural Space.

The Library could become an important factor in Seattle's position as an Alaskan cruise home port. An analysis by Martin Associates summarized the following benefits associated with the Port of Seattle's harbor in 2003: 1,072 direct, induced and indirect jobs; nearly \$39 million in local wages and salaries; \$124 million in revenue to local businesses; and \$3.8 million in state and local taxes.

According to Port of Seattle staff, Seattle is in direct competition with Vancouver B.C. for home port status for Alaska cruises. The Port plays an important role in marketing Seattle to cruise executives by advertising in trade publications, producing print pieces such as the Washington State Visitors' Guide, and providing information to travel agents via the web. The goal of this marketing effort is to communicate the attractiveness of both the cruise facility and the city. By originating an Alaska cruise in a city with interesting, accessible attractions that are relevant to cruise patrons, the cruise line adds value to the overall package.

Staff stated that the Port would be interested in using images of the Library in the Port's marketing efforts, noting that attractive images are more compelling than a page of text, and that the modern architecture of the Library is an appropriate draw for today's targeted cruise demographic, an increasingly young, family-oriented audience.

While Holland America, Princess Cruises, Clipper Vacations and Argosy Cruises are not currently using images of the Library in their marketing materials, and have reported no impact on their business related to the presence of the new building, they reported that their primary marketing focus is on ports of call, rather than the home port.



Postcard included in a packet of promotion information distributed by Seattle's Convention and Visitors Bureau.

The Central Library Attracts Knowledge Workers and Related Sectors

The new Central Library is an addition to the network of attractions that draws knowledge workers and members of the Creative Class to Seattle. It contributes to Seattle's reputation as a place of thinking, learning, creativity and innovation – attributes that are valued by knowledge workers and the companies that seek out that workforce.

Seattle is a City that values knowledge and public amenities. Both fans and detractors of the Library's design would agree that Seattle's new Central Library is a bold statement. Viewed more broadly, the entire *Libraries for All* investment is an important declaration by the residents of Seattle that theirs is a modern and literate community which invests in public amenities and values education and learning. In addition, the new Central Library – the building itself – is an architectural icon for people who care about art, design, architecture, public spaces and cities.



"People who could live anywhere are more likely to want to live here now. After the tech bust, Seattle lost some of its luster; we became less of an attractive place. The new Library is helping us regain some of our status as a hip and interesting City; a place that young people especially, will consider a hot spot."

Kate Joncas
Executive Director
Downtown Seattle Association

"In particular, relocating businesses, start-up businesses, and small businesses of all kinds were perceived as enjoying the greatest benefit from public library products and services. Indeed, participants noted that public libraries were listed as a reason for a business's decision to relocate to a particular community."

McClure, Fraser, Nelson, Robbins;
Economic Benefits and Impacts From Public Libraries in the State of Florida; 2001

These are important messages that promote Seattle as an attractive place to live and work for a demographic which appreciates such things. Seattle has been celebrated as a home to entrepreneurs and innovators since long before its dot-com heyday. The Library will help the City to continue to attract – and retain – this intellectual capital which could easily flow to other cities competing to attract it.

The Puget Sound region is instituting an economic development strategy that focuses on key sectors. Two of the sectors targeted for growth – information technology and biotech – have businesses that value the workforce that will be attracted to Seattle in part because of the Library and all that it stands for. The economic benefits of such attraction are very difficult to quantify, but their significance is easily recognizable.

The President of Harbor Properties aptly summed up the role the Library plays in this capacity: "People make decisions as to where to live because of an accumulation of factors. The Library is an attractive statement of forward thinking in government, of a city brave enough to do something that's not milquetoast. These things help people decide where to live, work, set up a business."

The Library Contributes to Seattle's Sense of Identity

A common theme among individuals interviewed for the *Patron and Visitor Survey* was the desire by Seattle residents to show off the Library to visiting friends and family. One respondent recounted that, "We have a lot of guests – our house is like a B&B – and we always either take them here or tell them to come."

A great sense of pride in Seattle's newest landmark is evident, as well as a sense of ownership. Seattle residents feel connected to the Central Library, understanding their role in its design and construction, and its role in enhancing Seattle's public spaces and cultural amenities, as well as its economic vitality.

"It makes me want to
move to Seattle."

Central Library Visitor

"Community building is nebulous and it's
intangible. It is going to take all of us working
together to have a strong, literate culture
accessible to all people in the Seattle area."

Patricia Kim
Education Director
Seattle Symphony, Benaroya Hall



VIII. Conclusions and Recommendations



Seattle's new Central Library is having a demonstrably significant effect on Seattle's economy and the vitality of Downtown. The Library is responsible for \$16 million in net new economic activity in its first year of operation, which would not have occurred otherwise. If current interest in the Library is maintained, in part aided by investments in the recommendations below, new economic activity would total \$80 million for 5 years, \$155 million for 10 years, or \$310 million for a 20-year period. In addition to this quantifiable impact, the Library is drawing greater foot traffic to Downtown and has the potential to encourage further economic development Downtown and in surrounding neighborhoods. It contributes to Seattle's desirability as a tourist destination and home for knowledge workers and related industries. Finally, it serves as an important icon and source of identity for Seattle residents.

Seattle's new Central Library is a community asset with multiple benefits. While SPL has an interest in boosting use of library resources, increased visitation, particularly by non-residents, may be seen as increasing the system's costs for staffing, maintenance and informational materials while not advancing its core mission. Maximizing the Library's benefits requires a sharing of these costs and a deliberate, strategic effort by stakeholders benefiting from the Library's presence, including the City, Downtown businesses and trade associations. Only through a coordinated community effort will the Library achieve its enormous potential.

In some cases, these recommendations address actions that can be taken by Seattle Public Libraries. In other cases, the economic benefits accruing to the City would most appropriately be encouraged through collaborative relationships with other parties that benefit from the Library's presence.



Collaborative Effort



Seattle Public Library

SPL should continue to focus on being a great library. The benefits described in this report are driven by the Central Library functioning well in all of its core capacities as a library. Its roles as a tourist attraction, amplifier of Downtown vitality, and Seattle icon are linked to and dependent upon this core mission. The Library will best deliver the many benefits it brings to Seattle by continuing to be an excellent library, investing in technology, books, and skilled staff.

Open it up. A theme of the following recommendations is to continue to "open it up" by increasing the visibility, attractiveness, and accessibility of the building, particularly relative to mainstream audiences

Recommended Action Strategies to Enable the Library to Reach its Full Economic Potential

Focus on Being a Great Library



- Continue to partner with public and private funders to build excellent collections.



- Keep the facility attractive and well-maintained.

Increase Access to the Library



- Expand operating hours during weekday evenings and weekends.



- Extend garage hours to allow parking before the Library opens and after the building closes.






- Recognize and be prepared to accommodate the higher proportion of out-of-town visitors on weekends.







- Actively promote the rental of Library facilities for public use.






Make Improvements to Draw People in off the Street

-  • Add Downtown signage around to guide visitors to the Library and better signage around the Library to draw in casual visitors.
-  • Fully utilize coffee cart services.
-  • Use sidewalk placards to promote art displays and special events.
-  • Promote the Library as a place to stop over during public transit and a place to go for lunch time relaxation and enjoyment.
-  • Improve signage to draw people into parking garage.
-  • Develop image of the Library as a “third place” by training all staff to provide great customer service.

Market to the Regional Community

-  • Continue to hold special events in evenings and weekends to boost Downtown liveliness during non-business hours.
-  • Expand and promote the Library’s unique resources that have regional appeal such as the Seattle Room, the genealogy library, and the collection of aviation history resources.
-  • Develop innovative uses of the Library, such as weddings, private parties, and tour stops.
-  • Develop print materials for tourists.

Collaborate with Businesses and Attractions

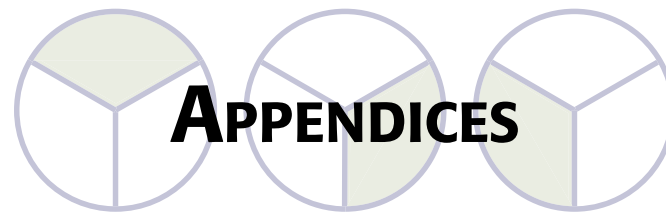
-  • Encourage Downtown businesses to offer promotions to Library patrons.
-  • Work with Seattle’s Convention and Visitors Bureau and others to feature the Library as part of a dense collection of attractions in and around Downtown Seattle.
-  • Ensure that the Library is featured on locally produced maps of Downtown and encourage inclusion of the Library in travel guides.
-  • Be an involved and proactive member of the group repositioning Downtown as a cultural arts district.
-  • Partner with arts organizations and businesses to sponsor evening and weekend programs that appeal to a wide audience and compliment other Downtown attractions.
-  • Recruit a loaned marketing executive from the private sector to develop the Library’s niche within other Downtown attractions.

Promote the Image of the Library

-  • Make Library images easily accessible and allow their use in marketing materials.
-  • Provide ready-made descriptive text of the Library for use in marketing materials: background, architecture, history, factoids.
-  • Work with media groups to promote use of the Library in commercial photo and film shoots.
-  • Offer more goods with the Library image in the FriendShop.

“We do not take PR and marketing lightly. You cannot build a world class facility and then fail to let it reach its full potential.”

André Mika
Executive Director
Shaw Center for the Arts, as quoted in “The Bilbao Effect,” *The Greater Baton Rouge Business Report*, November 23, 2004



Appendix A:

Interviews Conducted

Throughout the research and writing of this report at least 77 interviews were conducted with key stakeholders in Seattle, staff from comparable facilities, and business representatives.

Stakeholder Interviews

- Rose Abello, VP Public Relations, Holland America
- Lois Avery, Public Relation Director, Seattle Concierge Association
- Julie Benson, Director of Public Relations, Princess & Celebrity Cruises
- Diane Bevins, Puget Sound Attractions Council
- Vanessa Bloy, Director of Marketing, Argosy Cruises
- David Brewster, Executive Director, Seattle Town Hall
- Kevin Buckley, General Manager of Harbor Steps, Harbor Properties
- Rosie Courtney, Manager, Cruise Public Affairs, Port of Seattle
- David Dillman, Executive Director, Metropolitan Improvement District
- Kate Joncas, President, Downtown Seattle Association
- Allen Justad, Department of Planning and Development, City of Seattle
- Mary Justice, VP Membership, Greater Seattle Chamber of Commerce
- Staff, King County Seattle's Convention and Visitors Bureau
- Alisa Martinez, Director of Public Relations, Fairmont Hotel
- Chris McCoy, Economic Development Council of Seattle & King County
- Dennis Meier, Department of Planning and Development, City of Seattle
- Dennis Onslow, President, Harbor Properties
- Mike Podowski, Department of Planning and Development, City of Seattle
- Polly Radabough, Marketing Manager, Gray Line Tours
- Kimberly Reason, Director of Corporate Communications and Media Relations, Bon-Macy's
- Michael Rogers, Beeline Tours
- Staff, Seattle Art Museum
- Staff, Benaroya Hall
- Staff, Seattle Convention and Visitors Bureau
- Staff, Show Me Seattle
- Staff, Washington State Tourism Office
- Janis Smith, Vice President of Sales and Marketing, Clipper Vacations
- Andy Taber, Opus Northwest
- Mark Troxel, Department of Planning and Development, City of Seattle
- Leslie Williams, President, Williams Marketing

Comparable Facilities Research

- Assistant Director, Denver Central Library
- Assistant Director, Phoenix Central Library
- Assistant Director, Salt Lake City Main Library
- Director, San Francisco Main Library
- Director, Vancouver Central Library

Business Survey

Staff and management of the following businesses were interviewed:

- 321 Hair
- Bartell Drugs
- Blue Water
- Chez Dave
- Coach
- Crown Plaza Seattle
- Earth and Ocean
- Escada
- Fairmount Olympic Hotel
- Figs Gift
- Film Stop (2)
- Hotel Monaco
- J.D. Cook Travel
- Jeri Rice
- Marion Court (Café Zum Zum)
- Market Fresh
- McCormick & Schmidt

- Pacific Plaza Hotel
- Papyrus
- Renaissance Seattle Hotel
- Rite Aid
- Ruth's Chris Steakhouse
- Seattle's Best Coffee
- Specialties
- Starbucks (2)
- Troiani
- Tulio
- Tully's
- University Bookstore
- Young Flowers



Appendix B:

Patron and Visitor Survey Findings

Survey Purpose and Methodology

A survey of patrons was desired to understand the basic characteristics of visitors to the Central Library, including the purpose of their visit, their place of origin, how important the Library was to their visit to Downtown Seattle, and how much money they might spend while Downtown.

A total of 189 randomly selected people were surveyed in three rounds from September 30, 2004, to February 19, 2005. Recognizing the difference between weekday and weekend traffic, one day of surveying each round was done on a Thursday and one day on a Saturday. Similarly, each day of surveying involved two sessions: one at 11:00 a.m. and one at 3:00 p.m.

Surveys were administered verbally, at the top of the escalator connecting Level One and the Level Three Living Room. Staff surveyed for as long as was necessary to obtain at least 15 survey responses. In order to assure a random selection of respondents, survey administrators approached the fifth passerby after the previous survey was completed.

Survey Limitations

The Survey is limited in several important respects due to time and budget constraints, and due to the more comprehensive scope of effort to describe the Library's overall impacts on Seattle.

Due to the timeline of this project, surveying was limited to a five month period from the end of October 2004 to mid-February 2005. Without a full year of surveying, it is impossible to understand the full affect of seasonality on the makeup of Library visitors. Summer months would be expected to have a higher percentage of non-resident visitors to the Library. Given that spending by this out-of-town population is the driver behind this study's quantifications of net new spending in the Seattle economy, this means the results are likely conservative.

Similarly, surveying over multiple years would be required to understand how the characteristics of Library visitors may change over time.

Finally, it is important to note that the limited number of survey participants (189 individuals) means that in conclusions drawn from a small sub-set of respondents such as out-of-town visitors coming to Seattle for the primary purpose of visiting the Library, are not statistically valid. Conclusions drawn from such estimations much be treated carefully: they are reasonable approximations, not statistically valid projections.

**Exhibit B-1
Survey Chronology**

Survey Round	Date	Day	Times	Respondents	Cumulative Respondents
1	9/30/2004	Thursday	11:00 AM	17	37
			3:00 PM	20	
	10/2/2004	Saturday	11:00 AM	15	67
			3:00 PM	15	
2	11/18/2004	Thursday	11:00 AM	16	97
			3:00 PM	14	
	11/20/2004	Saturday	11:00 AM	13	126
			3:00 PM	16	
3	2/17/2005	Thursday	11:00 AM	17	159
			3:00 PM	16	
	2/19/2005	Saturday	11:00 AM	15	189
			3:00 PM	15	

Source: Berk & Associates, 2005

Summary of Findings: All Respondents

What's your main reason for coming to the library today?

	All Respondents	Seattle Residents	Non-Seattle Residents
Library Use	70%	94%	75%
Visiting the Library	30%	6%	25%

Do you live in the Seattle area?

Seattle resident	66%
Non-resident*	34%

* Defined as anyone living outside of Seattle.

How important was the Central Library in your decision to come Downtown today? OR

How important was the Central Library in your decision to come to Seattle?

	All Respondents	Seattle Residents	Non-Seattle Residents
Primary Reason	32%	41%	16%
Important	19%	23%	11%
Somewhat Important	13%	17%	5%
Not Important	32%	15%	64%
Unknown or not applicable	4%	4%	5%

Considering all expenses, how much money would you estimate you'll spend Downtown today? OR Considering all expenses, how much money would you estimate you spend, per day, while in Seattle?

	Seattle Residents	Non- Residents
Primary Reason	\$17	\$58
Primary Reason or Important	\$16	\$87
All	\$16	\$104

Summary of Findings: Seattle Residents

Which neighborhood do you live in?

Downtown	21%
Capitol Hill	12%
Queen Anne	8%
West Seattle	7%
First Hill	6%
University District	6%
Other	40%

Has your use of the Central Library increased, decreased, or stayed the same with completion of the new building?

Increased	54%
Same	28%
Decreased	2%
Not applicable*	8%
Not answered	7%

* Most such responses were from people who did not live in Seattle prior to the opening of the new Central Library.

How important was the Central Library in your decision to come Downtown today?

Primary Reason	41%
Important	23%
Somewhat Important	17%
Not Important	15%

Where have you heard about the Central Library?

Media	26%
"Everywhere"	19%
Passing by	16%
Friend/Family	14%
Long-time library user	12%
Other/not answered	13%

Do you plan to eat out while you're Downtown?

Yes	34%
No	65%
Other/not answered	2%

Do you plan to shop while you're Downtown?

Yes	25%
No	74%
Other/not answered	1%

Considering all expenses, how much money would you estimate you'll spend Downtown today?

\$101+	1%
\$76-100	3%
\$51-75	2%
\$26-50	14%
\$.01-25	48%
\$0	28%
Other/not answered	4%
Average	\$15.89
Standard Deviation	\$25.45

Summary of Findings: Non-Seattle Respondents

What city do you live in?

Puget Sound region	33%
Other Domestic	52%
International	16%

- Puget Sound visitors came from Bainbridge (2); Bellevue (3); Edmonds (2); Olympia (2); Tacoma (2); and other cities (10).
- Three visitors came from Eastern Washington.
- Other domestic visitors came from California (7), Oregon (6), and other states (17).
- Those coming internationally came from Canada (3); Chile; England; Greece; Ireland; Israel; Korea; and Spain.

What was the purpose of your trip to Seattle?

Travel	52%
Business	22%
Seattle Public Library	16%
Other/not answered	10%

How did you hear about the Central Library?

Media	33%
Friend/Family	25%
Friend/Family & Media	6%
Other/not answered	36%

Specific media mentioned included the Seattle Times or Post Intelligencer, the Herald Tribune, Home and Garden, the New York Times, and National Public Radio.

Are you a participant in a ...

conference?	6%
tour?	0%
cruise?	0%

How important was the Central Library in your decision to come to Seattle?

Primary Reason	16%
Important	11%
Somewhat Important	5%
Not Important	64%

Of the ten non-resident respondents who came to Seattle for the primary purpose of visiting the Library, eight were from Washington (Bellevue (3), Bremerton, Lynwood, Olympia, Poulsbo and Sumner) and two were from out-of-state (Portland and San Francisco).

Have you visited, or do you plan to visit, any other attractions in Seattle during this trip?

Yes	55%
No	34%
Not answered	11%

If yes, which one(s)?

Pike Place Market	16
Space Needle	7
Seattle Art Museum	6
Ferry boat ride	5
Pioneer Square	2
Sporting Event	2
Other*	22

*Includes Boeing, Greenlake, Tacoma Glass Museum, UW, and other destinations)

Where are you staying while in Seattle?

Hotel	30%
Other/not answered	70%

For how many nights?

28 nights or more	2%
21 to 27 nights	2%
14 to 20 nights	3%
7 to 13 nights	5%
1 to 6 nights	33%
Not answered	56%
Average	5.4 nights

Do you plan to eat out while you're Downtown?

Yes	84%
No	16%

Do you plan to shop while you're Downtown?

Yes	55%
No	42%
Not answered	3%

Considering all expenses, how much money would you estimate you spend, per day, while in Seattle?

\$201+	13%
\$101-200	17%
\$51-100	16%
\$26-50	25%
\$0-25	30%
Average	\$104.21
Standard deviation	\$124.46

General Comments: All Respondents

Do you have any general comments about the Library or the new building?

- Gorgeous! My experience with it last visit was wonderful and I anticipate it will be the same today.
- It's great, though we're disappointed not to be able to take the architecture tour which was just cancelled.
- Great for education uses.
- I come to use equipment for the disabled. I wish it had more restrooms – they're few and far between and not on every floor. I also wish the elevators ran faster.
- I come here to use the Internet.
- Great, wonderful. Nice to see public programs doing so well.
- I love having this outside my window at work.
- A lot of things were done right.
- I love all the light.
- It's great. With the new library I take the bus over here, meet my husband and walk home.
- My family uses the northeast libraries, but I love to come down here.
- It's one of the finest libraries in the U.S. I've lived on the E. Coast and traveled through Europe and the Central Library is one of the finest libraries I've ever seen.
- I come to the Central Library once a week as an outing. I like the building – it's an interesting concept.

- I'm distressed by the art on the escalators. I've heard many comments from people reacting negatively to it. It's seen as racist and prejudicial of Asians. One girl said she would tease her classmate because she looks like the video. I would appreciate comment cards throughout the library to provide feedback like this.
- It's beautiful, though the red floor gives me a headache.
- I love all the color and the fun little things like escalator art. The computer access is wonderful and better than the library at home.
- I like how the computers are offset and quiet. It's easy to find everything.
- I was at the Central Library during a fire drill, and found the emergency stairs were dangerously jammed up. Signs for emergency stairs shouldn't be made out of paper in case of fire. There should be a big informational floor plan placed near the entrances so patrons don't always have to ask directions.
- Love it. The spiral is too narrow on the inside track – it's easy to get stuck behind people who mosey along. I love how unconstrained the architect was – he didn't seem to have to compromise.
- It's very different, space-age.
- Very different... takes some getting used to. I could use a tour guide. It's very impressive.
- I don't care so much about the building, but it's convenient and utilitarian. It provides easy access to the Internet and books.
- As a former Seattle resident, and architect, I think it's great to see here, great for Downtown Seattle.
- It's a great resource to have near work.
- I'm doing genealogy research.
- The library is really neat, but I don't like the faces on the escalator. I complained about them, but I guess the kids like them.
- It's a very quiet, good place – useful for the whole community. The library is very confident in people, letting them access books.
- It's a good place to get warm. It's kind of a new fangled building.
- It's a good place to visit; the staff are very nice.
- I love the openness. It appears user friendly, though I heard about some controversy.
- Just as cool on the inside as it is on the outside!
- Good, but kind of overwhelming. An awesome place.
- I like the oddness of the building, it gives it personality. Quirkiness makes us feel ownership over things. The building is spacious; you don't feel cramped. Access to books is also very easy.
- Excellent architecture. Nice nuances, especially the plans and escalator art. Well-made. I like the music room.
- It's too industrial, not warm. It's a cold-feeling building. There's a very nice library in Puyallup. Some warm color, perhaps on the concrete tower, would help. It's a nice gathering spot for the City. Staff have been very helpful.
- It looks quite nice.
- It's a very nice place, with the exception of security bothering us while we play chess. I like the design, the fact it leans out so much.
- I enjoy the new building. It's very artsy, which is what a library is for: art and entertainment as well as books.
- It's great.

- No comment.
- It's really something new and complex. I'm still evaluating it: I don't fully understand it yet.
- Too modern for my taste. It's hard to get around, hard to navigate easily.
- It's exceeded all my expectations. Being a government project I expected worse, but it's really great – a vast improvement over the old one.
- Love it – much nicer than Victoria's.
- There should be more space for chess playing.
- It's linear and modern.
- I don't really love it; it's sort of like a factory.
- It's great, I love it.
- We have a lot of guests (our house is like a B&B) and we always either take them here or tell them to go.
- It's a good looking place.
- Very good, not like before. It's very high tech.
- I like the library, the size of it. I don't think modern was the way to go, though.
- Athens needs a library like this, the light is great.
- I like the library a lot, though I don't like the Book Spiral. The passage is too small when the library gets crowded. But the library is beautiful.
- Cool looking. DC libraries are terrible. It seems like you guys have good public resources.
- I like the large study areas. They're very quiet.
- It's awesome, I just moved from Vancouver, Washington, and we don't have anything like this
- None – we just walked in.
- I'm homeless and it's a nice, warm place to go. I read and stay out of people's way.
- It's aggravating because it's difficult to find anything. The old Central Library was much easier. This is a much bigger space, with the same number of volumes, so by definition you have to cover more ground to find what you want. A library is a library: it's about the books. The building should be more functional and less showy. It's ok as a tourist draw, though, and good for Downtown.
- I really like it.
- It's fantastic! It enriches the cultural life of Seattle, making like a European city – Seattle could be the next Amsterdam. It's very accessible; obviously the designer loves people as well as books. I appreciate that tax dollars were spent on such a project, and that it's located Downtown.
- It's rad! It makes me want to move to Seattle!
- I really like it a lot. Computer access is great; the building has a good feel. The Spiral is easy to use, access to books is great.
- Each library section isn't big enough – doesn't have enough books. For example, there are 10 copies of one Irvin novel and no other titles. We're paying for the building, not books.
- My first impression is great.
- The hold system is awesome, like no other. Have heard that SPL's main focus is to please the patron? They seem to have gone out of your way to do that.
- Excellent!
- Very beautiful, architecture is interesting
- Well done, service is inviting and helpful!

- It's totally wonderful in here.
- I'm just stopping in after my hair cut. It's so beautiful in here on a sunny day!
- Wow!
- Big, very nice. I'll bring 6 year old niece next time she visits, a big reader.
- An interesting building. I don't really understand it.
- It's amazing, incredible. I don't know how they pulled it off, the structure is so insane. It's really overwhelming when you first walk in.
- It's fabulous! I love it!
- It's nice to have the great light.
- It's kind of hard to find your way around (maze like) but I love the architecture.
- I think it's great.
- Overall it's very good, but I would like a down escalator.
- It's gorgeous and fun – exciting to explore. I like the bright colors.
- It's nice, different from anything else I've seen.
- I like the floors downstairs, and the escalator that seems to rise into the sky.
- Magnificent!
- Impressive
- It's awesome; I feel like I'm in Gattica
- I'm a huge fan. It's democracy in action. I teach history, and I can say this is the purest example of democracy I can find: free, easy access to so much information!
- I love coming down here for the day. I'm here to do genealogy research.
- I hope things don't get too scratched up.
- In Madison, private donors gave \$200M for an arts center – it would have been better spent on a library like this one. Spectacular!
- Wowie zowie!
- My wife is disabled and abled people plugging up the elevators prevent her from enjoying the library. She has filed a complaint, but we have gotten no response.
- I was surprised by the use of cement: it doesn't seem to mesh well with the use of glass and metal, which seems expensive and upscale.
- A very strange design. There might be an awful lot of wasted space – but it is nice looking.
- I take the bus all the way down here. That says something!
- Its really great
- I really enjoy coming here.
- The question is: does it beat the Vancouver B.C. library? Seattle public architecture has never in the past quite hit the mark, but I think this does. It's exciting and bold.
- It's pretty, very cool, which doesn't come across in pictures. I remembered while driving up to Seattle, which made me look forward to my visit even more. In my opinion, it's an important draw to the city.
- I love it.
- I love the combination of open and closed spaces. The colors are fantastic: some are forbidding and unpleasant.
- Excellent, love the color, brightness, ambient light. It's different and modern.

- I love the children's area though DVDs are very limited.
- I love this building: it's an architectural wonder.
- I like the computers. I'm concerned about the crime, fighting, and crazy people.
- I like it, but I've gotten separated from my tour!
- The library looks better from inside than from outside.
- Since I started coming, I'm sure to come back
- It's great architecture.
- It's great inside, but outside it doesn't seem to fit with the surroundings. It's too starkly modern.
- Looks good!
- It's fantastic, very different from traditional libraries. It's open and airy, but some people may find it challenging. Others may like more traditional libraries. The reading room upstairs is fantastic and more typical of a traditional library.
- It can be confusing to find things. Computers are extensive and very useful. Staff are helpful and very knowledgeable.
- Disabled access could be improved, and there's no down-escalator. Other than that, I think it's great.
- It's a beautiful building.
- Cool! Interesting colors. I really like it. There are lots of books. I like that there's more natural light than artificial light.
- It's alright: the architecture looks like a ball of steel wool from the outside. I wish I could use the computer for more than an hour per day. There are always 20-30 empty machines.
- Really cool; the architect did a fabulous job.
- It's good. I appreciate access to lots of books.
- All the glass and light is wonderful, especially when it rains. Having lots of computers is nice.
- It looks good and is functional.
- Great place.
- Quite spacious-an architectural wonder, really.
- It's beautiful. It's a nice place to come: with an extra 30 minutes in my schedule, I chose to come here rather than walk around outside on this beautiful day.
- I like it-lots of books to choose from.
- Architecturally, it's stunning – a complete gem. It's a cultural magnet, packed every time I'm here. It's the temple of learning it should be.



Appendix C:

Literature Review: Measuring Value of Libraries

The Value of Libraries

Much of current academic and policy research surrounding the economics of libraries focuses on the value of library services and not the economic impacts of the library itself. In the changing world technology and access, the value of libraries and the services they provide has come into question by many policy makers and the tax paying public. As with parks and other public open space, libraries have found themselves in the position of justifying their very existence. This need for justification led to a rush of studies attempting to value the use of library services through the late nineties and into the 21st Century.

A sampling of relevant literature was reviewed for this study. This review examines use value studies for library systems in Birmingham, Alabama; Florida; Phoenix, Arizona; New York State; Phoenix, Arizona; Pennsylvania; St. Louis, Missouri; and South Carolina; as well as a sampling of studies on the use value of public space, and art museums.

Of the studies concerning libraries, Birmingham, Phoenix, and St. Louis are part of research funded by the Institute for Museum and Library Services (IMLS) using methodology created and led by Glen Holt of the St. Louis Public Library System. Dr. Holt's methodology has been used across the country in large public library systems and is currently being implemented in some medium-sized systems. This methodology depends primarily on surveying library users, and in every case at least 2,000 respondents are surveyed.

The most common methodology used, by Holt and others to measure the value of libraries and evaluate and justify the funding for a number of public libraries across the country has been a cost-benefit analysis. Cost-benefit analyses incorporate a number of different methods to determine direct, indirect, and induced benefits to the user.

- **Direct benefits** refer to the direct value received by utilizing the measured services. In the case of a library, direct benefits are derived from the library providing information materials and services directly to users, such as the ability to check out a book or browse a database provided by the library.
- **Indirect benefits** are benefits felt by a third-party or society as a whole when individuals use the public services. An example of indirect benefits of public library use would be a business owner gathering information that contributes to that owner hiring a new employee or increased economic activity for that business.

While traditional cost-benefit analyses measure both direct and indirect benefits, indirect benefits are considered less credible because they are difficult to quantify. Because the rationale for recent research into the value of libraries has been an effort to justify the tax dollars each library receives, and in every case the rate of return on direct benefits alone far outweighed that total, researchers found no need to estimate indirect benefits. Instead, researchers focused estimating direct benefits to library users through statistically valid surveys and market analyses determining the price of substitutes.

To best express study findings researchers most commonly express results through a rate of return, specifically the value received for every dollar invested. Researchers believe tax payers are most likely to understand benefits in terms of value returned on each dollar of tax invested. This approach appeals to the consumer aspect of library use as well as fitting within the bounds of cost-benefit analysis.

There are three commonly used methods to evaluate direct benefits to library users in a cost benefit analysis.

The **contingent valuation** method often used by environmental policy makers and economists to determine the value of non-market goods or goods that have no pre-determined market value, is controversial, but useful when used conservatively and in appropriate context. By asking library users' to state their values instead of determining value by the users actual choices, contingent valuation is often called a "stated preference" method as opposed to a "revealed preference" method. The two approaches for determining contingent value are:

- **Willingness to Pay.** This approach uses interviews to determine how much users would pay to have something they currently do not have. To determine the contingent value of libraries using the willing to pay method, hypothetical situations are posed to library patrons and the general public such as how much they would be willing to pay to avoid losing library services, or if libraries did not exist, how much would they be willing to pay to regain library services.

- **Willingness to Accept.** In this approach subjects are asked how much they would accept to sacrifice something they already possess. To determine the contingent value of libraries using the willing to accept method, the survey population is asked how much of a tax cut or refund they would accept in exchange for surrendering their library service.

The second method used, **consumer surplus**, measures the value placed on utilization of a good or service over what must be paid to get it. While library services are "free," patrons do pay by the time, effort, and funds they use to access these services.

Researchers can also value the **cost of time** and energy applied to access library services. The belief is that the value of services is at least equal to users' lost time. The sum of the cost of time for all patrons is the last of three estimates of the direct benefits of library services.

Researchers across the country have used at least one, if not all three of these methods to determine the value of library services. Additionally, many studies have differentiated between the value to a regular user, a user in a educational field such as a teacher, and a business user. These three groups are surveyed and analyzed separately but totaled to determine value of the library to all users. Exhibit B-1 shows the breakdown of these numbers from studies where they are provided.

Exhibit B-2 shows the return on one tax dollar invested in the culmination of a larger sample of studies. These numbers correspond to the figures in the final column of Exhibit B-1.

Can these results be applied to the Seattle Central Library? None of these figures can be applied directly to the Seattle Central Library because of the range of budgets, surrounding base populations, and differing users. As value is determined by the user base, even the King County number would be inappropriate to apply, as Seattle Public Library users were not surveyed. As shown in the Exhibit, the conclusions show dramatically different returns on tax dollars, requiring intensive surveying of local population for each study.

Exhibit B-1
Contingent Valuations for Selected Libraries

	Value per Household	Value per Teacher	Value per Business	Total Value	Tax Investment	Return per Tax Dollar
Birmingham	\$351	\$5,875	\$11,290	\$33 M	\$12 M	\$2.72
New York State	\$235	unknown	unknown	unknown	unknown	\$12.50
Phoenix	\$350	\$2,800	\$2,000	\$250	\$25 M	\$10.00
St. Louis	\$381	unknown	unknown	unknown	unknown	\$4.00

Source: Berk & Associates, 2005

Exhibit B-2
Rate of Return on Every Dollar Invested into Selected Public Library Systems

Public Library System	Value of Return
Birmingham	\$2.72
South Carolina	\$2.86
Baltimore	\$3.00
St. Louis	\$4.00
King County	\$5.00
Florida	\$6.54
Phoenix	\$11.00
New York State	\$12.50

Source: Berk & Associates, 2005

Contingent Value Applied to the Arts and Environment

Many studies applied the contingent valuation to arts-related goods around the same time period as the previously mentioned studies of libraries. Typically studies fit into one of the following categories:

- Studies determining willingness to pay as it applies to maintenance or restoration of cultural icons;
- Studies that approximate values for projects that impact cultural resources; or
- Discovering alternative funding sources by estimating willingness to pay for a facility when standard funding is not available.

Environmental lobbyists have used contingent valuation studies to argue for more funds and protection of natural and open space. Studies applying contingent valuation to environmental issues cover a vast range of topics from the value of a park to urban residents to the value of the removal of dams to develop salmon populations. Because of the varied nature of subjects, use values range from \$2.00 to over \$100.00 per user or higher depending on the issue and location.

Can these studies be applied to the Central Library?

The Seattle Central Library serves Seattle not solely as a Library; it is also a cultural and public space, as well as an art and architectural destination. However, just as contingent valuations of other library systems cannot be applied to Seattle's Central Library, the result of similar studies of open space and cultural facilities also cannot be applied. The Library is not open space, and while functions as community space, that is a secondary function.

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Appendix D:

Comparable Cultural Facilities Review

Research Background and Methodology

To gain insight into issues surrounding libraries and other comparable cultural facilities, a survey was conducted of six facilities across the country. Each facility was selected because it met most of the following criteria:

- Received critical acclaim for architectural form nationally or internationally
- Attracts visitors from outside the region
- Is no more than 10 to 15 years old
- Is located in comparably populated area with multiple attractions for visitors

Of the six selected facilities, five are central library branches in urban public library systems:

- Burton Barr Library (Phoenix, Arizona)
- Denver Central Library (Denver, Colorado)
- San Francisco Main Library (San Francisco, California)
- Salt Lake City Main Library (Salt Lake City, Utah)
- Vancouver Central Library (Vancouver, British Columbia)

The other facility, included to provide additional context, is architecturally acclaimed and internationally respected museum:

- Guggenheim (Bilbao, Spain)

From December 2004 through February 2005, research was conducted through telephone interviews and a literature review to assess the economic development ramifications and strategies designed and established by these facilities.

Interviews focused on the effects of each facility on its community, the impact of each facility on local tourism, lessons learned, operational issues and impacts, and strategies and partnerships developed to maximize benefits.

Key findings are summarized below, followed by brief profiles of each facility.

Summary of Key Findings

Business Growth and Economic Activity. None of the surveyed facilities has completed an economic impact assessment. However, every comparable facility in this study reports business growth surrounding the facilities, both in terms of additional business to existing enterprises and the appearance of new business ventures.

Libraries in Phoenix and Salt Lake City have seen new condominium complexes within a block of the library which use proximity to the library as a selling point. In Salt Lake, one complex is called "Library Square Condominiums." All interviewed facilities report seeing new cafes and restaurants open nearby.

Older facilities in San Francisco and Phoenix report that the libraries' presence has helped to solidify the surrounding neighborhood and create a place for sustained economic growth.

Tourism Impacts. In every case, the comparable facilities surveyed report experiencing an influx of out-of-town visitors. After some initial settling of interest, requests for tours and other signs of regional, national, and international tourism have not declined. The Burton Barr Library in Phoenix still hosts individual and group tourists on a regular basis, nine years after opening. Groups visiting the libraries most often represent special interests, specifically librarians, architects, and professionals involved in the education or information fields.

Community Character and Livability. Comparable facilities report that they are well received contributors to civic and community life, and there is a sense that each facility contributes to the overall quality of life for the surrounding neighborhood. Furthermore, each facility has helped build the potential for residential growth, as seen by the development of condominium and apartment complexes, as well as restaurants and other social gathering places.

Community Image and Identity. Each facility has also recognized its role in the greater network of area attractions and community and economic development. No facility views itself as a driver of new development but as a contributor. Furthermore, each facility has become a source of pride for local residents.

Seattle Central Library for Comparative Purposes

Year Opened	2004
Architect	Rem Koolhaas
Square Feet	362,987
Annual Visitors/ Door Count	2.3 million*
Annual Circulation	1.3 million*
Surrounding Population Base	563,374
Operating Hours	Monday - Wednesday: 10 a.m. - 8 p.m. Thursday - Saturday: 10 a.m. - 6 p.m. Sunday: 1 - 5 p.m.

* Estimate for first full year of operations

Burton Barr Library (Phoenix, Arizona)



Year Opened	1995
Architect	Will Bruder with Wendell Burnette
Square Feet	280,000
Annual Visitors/ Door Count	0.9 million
Annual Circulation	1.5 million
Surrounding Population Base	1.3 million
Operating Hours	Monday - Thursday: 10am - 9pm Friday & Saturday: 10am - 6pm Sunday: Noon - 6pm

The Burton Barr Library developed as part of a 1988 bond program bringing new and expanded cultural spaces and programs to Phoenix.

Economic Impact. Library administrators report steady and small economic growth in the surrounding Phoenix neighborhood due in part to the Library. Small businesses have been opening around the Library consistently since the opening, even now, ten years later. Additionally, administrators describe the development of new apartments, the marketing for which uses the proximity to the Library as a selling point.

Tourism Impact. Since the building opened in 1995, Library administrators have given upwards of 50 tours for architects, engineers and librarians from around the world. In addition, many schools of architecture arrange tours for their students. According to staff, the building has consistently received positive reviews in architectural journals and in other media.

Phoenix administrators also host groups traveling to learn about other facilities before design of their new facility. Administrators characterize these groups as those planning a new facility and "wanting to learn about our project since it was built at such a low cost, and yet is internationally recognized for its architecture, detailing, functionality, flexibility and ease of use by the public."

Community Character/Community Image. The Library is located near the Phoenix Art Museum, the Heard Museum, the new Federal Courthouse and new City of Phoenix Court. Library administrators report working closely with other facilities and that the proximity of these institutions has given Phoenix a cultural and civic center.

As the Denver Central Library celebrates its tenth year, administrators still look to serve the business community, and particularly the small business community.

Economic Impact. The Library administration sees its most profound impact in serving the business community's need for information. The Library is considered a vast resource for anyone opening or developing a business plan or acting on that plan.

A number of recent construction projects have halted business growth directly surrounding the Library, but there are plans for high-end condo development when construction of the nearby art museum is finished.

Tourism Impact. The Denver Library is a premier destination for two special collections: Western Americana and a rich genealogy research section. This makes the Library a destination for many special interest groups. The Library partners with the Downtown Denver Visitors Bureau to advertise the Library and develop a tourist base.

Community Character/Community Image. The Denver Central Library has been proactive and aggressive in scheduling community events and building community relations. 25,000 residents participate in *One Book, One Denver* a city-wide book club. The Library is running five-week courses about film, cooking, travel, writing and other cross-generational community interest courses through the library.

The Library partners closely with Opera Colorado, local public radio, and the art museum. Library administration believes this has had a significant impact on visitation and circulation at the Central Library.

Denver Central Library (Denver, Colorado)



Year Opened Architect

1996
James Ingo Freed (Pei Cobb Freed & Partners)
and Cathy Simon (Simon Martin-Veque
Winkelstein & Moris)

Square Feet Annual Visitors/ Door Count Annual Circulation Surrounding Population Base Operating Hours

630,000
unknown
unknown
500,000
Monday & Tuesday: 10 a.m. - 9 p.m.
Wednesday: Closed
Thursday-Saturday: 10 a.m. - 5:30 p.m.
Sunday: 1 - 5 p.m.

Salt Lake City Main Library (Salt Lake City, Utah)



Year Opened	2002
Architect	Moshe Safdie and Associates, Inc.
Square Feet	unknown
Annual Visitors/ Door Count	3.1 million
Annual Circulation	unknown
Surrounding Population Base	200,000
Operating Hours	Monday - Thursday: 9 a.m. - 9 p.m. Friday - Saturday: 9 a.m. - 6 p.m. Sunday: 1 - 5 p.m.

The Salt Lake City Library is the second most popular tourist attraction in town after the Church of Latter Day Saints Temple. It is also functions as a central community center for the city.

Economic Impact. Library administrators report signs of development surrounding the library. The opening of the Library has spurred growth of a mixed-use neighborhood in Salt Lake City, a city in which neighborhoods typically are residential or business, but not both. Two sets of condominiums are located a within block of the library, both using this proximity as a selling point. One is even called "Library Square Plaza."

The neighborhood surrounding the Library has changed during the evenings according to library administrators. The Assistant Director reports, "It is now light and alive after 7 p.m. There are neighboring restaurants, including one which has expanded hours since the Library opened." Library administrators report very little new retail development.

Tourism Impact. The Library receives more visitors than any attraction in Utah other than the Church of Latter Day Saints Temple. According to administrators, it is often the first place visitors are taken. Reportedly, within its first month, the Library experienced an immediate increase of local, domestic and international traffic. The flow of visitors decreased some what after the early months, but the decrease was small and short, after which attendance has remained high and fairly steady at three million visitors per year.

Library administrators believe the key to keeping attendance constant is to utilize the Library's role as a center for the arts and culture. Rotating events, speakers, exhibits, and community festivals encourage repeat visitors.

Community Character/Community Image. The new Salt Lake City Main Public Library has been a source of pride for city and even regional residents. The Salt Lake City Library was designed to function as a cultural and civic center, with a large outdoor plaza and a number of publicly accessible meeting rooms which are now in extremely high demand.

The Library hosts a diverse array of community celebrations, including Chinese New Year, the celebration of the end of Ramadan, and events for Vietnam veterans. In total the library has relationships with over 1,000 diverse community groups. Interviews with library staff concluded, “[though it is] hard to measure, there has been real progress in all sorts of civic dialogue.” The Library has opened people’s eyes to the diversity of their community and helped to shape the image of the city.

Cooperating with the Media. According to Library administration, agencies across the area immediately came looking to use the Library as a backdrop for photo and film shots. The administration established a media policy stating that if a shoot is disruptive, needs the Library to be open during non-regular hours, or requires staff assistance, a fee will be assessed. The Library also reserves the right to make sure administrators agree with the how the Library is portrayed.



San Francisco Main Library (San Francisco, California)



Year Opened Architect

1996
James Ingo Freed (Pei Cobb Freed & Partners)
and Cathy Simon (Simon Martin-Veque
Winkelstein & Moris)

Square Feet Annual Visitors/ Door Count Annual Circulation Surrounding Population Base Operating Hours

376,000
2.2 million
1.9 million
776,733
Monday & Saturday: 10 a.m. - 6 p.m.
Tuesday - Thursday: 9 a.m. - 8 p.m.
Friday: Noon - 6 p.m.
Sunday: Noon - 5 p.m.

The San Francisco Main Library is located in a neighborhood largely considered a civic and cultural center, near City Hall, a symphony hall, and the new Asian Art Museum.

Economic Impact. According to the Director of the Main Library, this neighborhood has changed significantly over the last decade. With the help of the current mayor, increased police presence, and a number of construction projects, including the new Library, increased sidewalk lighting, and other pedestrian-friendly elements, the neighborhood has become healthy and vibrant. While the Director believes the opening of the Asian Art Museum was the major driver of this change, she sees the Library, the first of many construction projects, as starting the renaissance and continuing to contribute. In general, Market Street, has become a cleaner, more friendly environment.

Meeting Space. The Library has five meeting rooms and an auditorium, however, not a lot of space available without cost. The Library charges for refreshments, janitorial services, and other operational costs. This limits the use of interior space to non-profit groups holding fundraising events.

Community Character/Community Image. According to Library administrators, close proximity lends itself to cooperation among nearby civic and cultural facilities. There is a large plaza between the Library and the Asian Art Museum which has become a location for festivals and community celebrations. The museum and Library also collaborate on educational programs and tours.

The Library's visitors have fluctuated over the years with the many construction projects and neighborhood changes. When it first opened, the Library saw about 10,000 visitors per day over, only to dip to below 4,000 and rise again to around 6,000 per day today.

Cooperating with the Media. The Library has a public relations manager and is encouraged by the City of San Francisco to bring in the media. Any funds received in excess of Library costs go to the City's general fund, so little incentive exists for the Library to do so.

The Vancouver Library anchors Yaletown, serving a large Downtown population.

Economic Impact. No official study has been done to calculate the economic impacts from the Library, though anecdotally Library administrators report thriving restaurant and retail businesses in the surrounding blocks.

Tourism Impact. Library administrators report three types of tourism over the past 10 years: groups with a relevant background such as librarians or architects; group tours and individual tourists coming to visit the Library; and tourists coming to the Library for Library uses, particularly Internet access. While Library administrators say the buses pulling up to the Library have slowed as the Library is no longer a new attraction, special interest groups still come, as well as tourists who use Library resources.

Community Character/Community Image. When Vancouver rebuilt its Central Library in the early nineties, the City decided to move the building from the heart of downtown Vancouver to an adjacent neighborhood, Yaletown. City and Library administrators saw potential for the new Library to serve as a much needed anchor for the developing neighborhood. This shift in location has increased the range of the Library's role in Vancouver. While the Library still serves the whole Vancouver population it also has a new role in serving a downtown residential community.

According to staff, the Library has become a safe community center and gathering place, in part due to cooperation with two nearby theaters for community events and parking needs.

Cooperating with the Media. The Library has a full-time film liaison to facilitate media shots at the Library by everyone from small commercial directors to large-scale film companies.

**Vancouver Central Library
(Vancouver, British Columbia)**



Year Opened

Architect

Square Feet

Annual Visitors/ Door Count

Annual Circulation

Surrounding Population Base

Operating Hours

1995

Moshe Safdie and Associates, Inc.

398,000

2.5 million

2.4 million

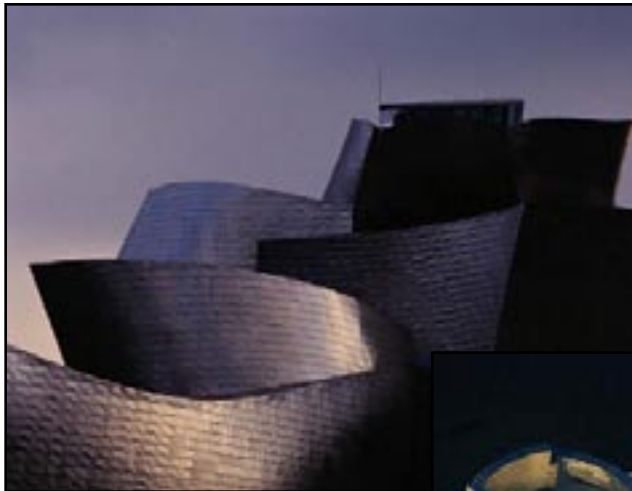
unknown

Tuesday - Thursday: 10 a.m. - 5:30 p.m.

Friday & Saturday: 10 a.m. - 5 p.m.

Sunday & Monday: Closed

Guggenheim Museum (Bilbao, Spain)



Year Opened
Architect
Square Feet
Annual Visitors/ Door Count
Surrounding Population Base
Operating Hours

1997
Frank O Gehry
unknown
unknown
unknown
Tuesday - Sunday: 10 a.m - 8 p.m.
Monday: Closed

The Guggenheim Museum in Bilbao, Spain has developed as an internationally renowned tourist attraction and helped change an industrial city into a cultural arts center.

Economic Impact. The Guggenheim's opening has showed Bilbao and the world how the arts and architecture can advance economic development. With the early success of the Museum, new hotels, restaurants, and other retail establishments opened throughout the City. This phenomenon surrounding the Guggenheim has been coined as *The Bilbao Effect*.

In 1998, the Guggenheim Museum Bilbao commissioned a study to model the economic impacts of the museum for Basque County. The study considered direct expenditures made by groups holding events in the Museum, expenditure profiles of Museum visitors, and the indirect and induced effects on commercial sectors. According to Forbes magazine, the Bilbao estimates that the economic impact on the local economy was worth 168 million Euros in 2000. The Financial Times estimated that the Museum had generated 500 million Euros in economic activity for the region during its first Three years.

Today, Bilbao is one of the most visited cities in Spain and the museum, and to date has attracted over 6 million visitors.

Community Character/Community Image. The success of the Guggenheim has transformed the city of Bilbao. In the past seven years, numerous new cultural and civic projects have sprouted across the City, to reclaim and revitalize the waterfront. The Museum continues to serve as an incalculable source of civic pride for Bilbao residents.