



# Final Report

Program of research into current and future audiences

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# Executive summary

Key findings





# Executive summary

Key insights



# Executive summary – project background

<p><b>Research objectives</b></p> <p>Key aims of the research were to:</p> <ul style="list-style-type: none"><li>• Better understand current and future or new audiences, their needs, expectations and behaviours</li><li>• Derive engagement strategies and opportunities to better connect with audiences, and position the National Library of Australia as a primary national provider in the sector</li><li>• Create a benchmark of audience satisfaction and the National Library of Australia’s performance, to determine key areas of development</li><li>• Provide voice to key diversity audiences, who face unique challenges and barriers, and thus may see underutilisation of National Library of Australia services</li></ul>	<p><b>Methodology</b></p> <p>Seven components of research were commissioned by the National Library of Australia as part of this program of consumer research:</p> <ul style="list-style-type: none"><li>• A general population survey</li><li>• A current audience survey (recruited through eNews and other National Library of Australia channels)</li><li>• An intercept survey on-site in Canberra</li><li>• Diversity surveys amongst Aboriginal and Torres Strait Islander peoples, culturally and linguistically diverse Australians and people living with disability</li><li>• Focus groups amongst potential new consumer audiences</li><li>• Focus groups amongst current audiences</li><li>• Focus groups with diversity group stakeholders</li></ul>	<p><b>Timing</b></p> <p>Research data was collected in between November and December 2020, with the reporting completed in January 2021</p> <p><b>GLAM Sector Definition</b></p> <p>Where referenced GLAM sector represents four institutional types: Galleries, Libraries, Archives and Museums.</p>
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# Executive summary – framing the report

## INTRODUCTION

<p>Insights from this research reveal there is a real opportunity for the National Library of Australia to consolidate its place amongst Australians and grow its brand engagement, especially online.</p> <p><b>Current audience vs general population</b></p> <p>Moving forward it is vital to look beyond current audiences (especially those voices continuously accessed through the library’s traditional feedback loops and used for this research). These users are loyal and supportive but <u>not</u> diverse, <u>nor</u> reflective of the general population. They are familiar and confident users who use library services with a study/research focus. As such they offer a biased view of what is required, and listening too closely to this target group won’t provide insights into how to engage or grow new target audiences.</p> <p>Instead, the library should shift its focus to the general population as growth opportunities here are considerable. Data collected provides insight into all potential audience groups - existing (albeit not highly engaged) and new.</p>	<p>Segmentation of population data identifies target groups with the most potential to engage but also guides wide reaching strategies for <u>all Australians</u>.</p> <p><b>On-site – a minor opportunity</b></p> <p>The library is doing well in generating awareness and visitation from those in Canberra and close proximity. Increasing on-site visits from travelers has some potential as the library doesn’t compete well with high profile institutions, such as the Australian War Memorial, and could benefit from a better place on the tourist agenda.</p> <p><b>Online – a major opportunity</b></p> <p>However, the greatest opportunity for the National Library of Australia moving forward is to increase engagement and usage of online resources, services and activities. Online, the National Library of Australia can offer <b>access to all Australians, everyday, nationwide</b>. The potential reach, volume and frequency of usage occasions compared to on-site visits is incomparable.</p>	<p><b>Focus on collections / library resources</b></p> <p>The product focus should be on the library’s unrivalled digitised collections and resources which have a natural fit with online delivery and offer a channel of information currently being used and of interest, especially for those aged 18-34.</p> <p>However, resources need to be made interesting. The diversity of collections means that although they currently work best to deliver to study/research aims, they can be repositioned to meet leisure and entertainment goals. However, this will not be easy. Pathways need an overhaul to better reflect leisure and entertainment needs.</p> <p>Using familiar GLAM activities to trigger engagement makes sense and can be used as a supporting strategy. However, the recommendation is to lead brand growth by better understanding how the library’s unique and extensive resources can forge a better fit with leisure and entertainment and meet general learning opportunities online. The opportunity here is immense and untapped.</p>
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# Executive summary – key insights

## CURRENT AUDIENCE

<p><b>Current audience feedback represents highly engaged supporters of the National Library of Australia</b></p> <p>Responses generated through the National Library of Australia’s online communication channels (website, eNews), result in considerably more positive feedback and support than found in the general population survey.</p> <p>With the library receiving a Net Promoter Score of 67 (versus 6 amongst the general population) the current audience appear highly satisfied and are clearly strong advocates for the brand. 3 in 4 are Promoters of the library, and only 7% are Detractors. According to the current audience, 41% believe there isn’t anything that the library can improve on.</p>	<p><b>Current audience feedback also represents the views of long-term users more focused on study and research</b></p> <p>The highly engaged current audience have an age and gender bias – they are most likely to be over 65 years (with many over 75) and more likely to be female. Most have been using the library resources for more than a decade.</p> <p>Key drivers to visit the National Library of Australia are research, study and work tasks and this is associated with viewing collections either online or on-site. On-site they are keen users of the Reading Room.</p> <p>They don't have a strong desire for the library to deliver to leisure and entertainment, although they do use the cafe and bookshop.</p>	<p><b>The current audience are heavy users of Trove and even this confident group find accessing this service can be difficult</b></p> <p>The National Library of Australia’s digital services are used by almost all (95%) of the current audience, the most common used resource being Trove.</p> <p>While Trove is the main category that the current audience think the library is performing well in, there are still concerns Trove isn’t as accessible or user friendly.</p>
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The National Library of Australia needs to be aware of the strong loyalty bias in their current audience feedback loop (used in this project and in other circumstances as well). Whilst listening to this highly engaged, frequent user group who are study/work focused is important, it does not reflect the general population and will not provide new ideas or highlight opportunities for engaging with new audiences.

# Executive summary – key insights

## GENERAL POPULATION (AUSTRALIANS 18+)

<p><b>The general population survey provided data on all Australians.</b></p> <p><b>Awareness and knowledge</b></p> <p>Although over 50% of Australians are aware of the National Library of Australia, many don't know much about what it does or what it offers. Whilst 81% of Australians recognise the name of the National Library of Australia only 6% know a lot about the institution. This suggests there is a real opportunity to get Australians more involved and informed.</p> <p><b>Interest and support</b></p> <p>When prompted, Australians are genuinely interested in the National Library of Australia's core remit and strongly support its role in collecting and providing access to Australia's cultural history. They also agree the library should create educational opportunities for all Australians and receive public funding.</p> <p>Tone is important and this will need to be considered in positioning the brand.</p>	<p><b>Trust</b></p> <p>Despite support for its core remit, only 59% of Australians trust the National Library of Australia with nearly 30% recording a neutral response. Trust is correlated with knowledge and those that know a lot or even a little about the library are <b>much more likely</b> to trust the institution. This suggests there is real value in Australians better understanding not only that the library exists, but a bit about what the National Library of Australia does.</p> <p><b>Potential barriers</b></p> <p>Regardless of interest, the National Library of Australia will struggle to engage and feel relevant to all Australians, particularly new users. Reference libraries are somewhat unfamiliar, with only 30% of Australians visiting them in a typical year. They tend to be seen as places for formal study, work and research and much less as places to go for leisure or entertainment.</p>	<p><b>On-site visitation</b></p> <p>19% of Australians have visited the library in the past five years. Proximity to the library in Canberra does increase visitation with 59% of ACT residents having visited the site (albeit this drops to 20% for those within 190kms of the ACT). This suggests that location is an issue and that national reach through online services will be an important part of the brand offer.</p> <p><b>Satisfaction amongst visitors</b></p> <p>Library visitors found in the general population survey are mostly satisfied with the services the National Library of Australia has to offer. However, they are less likely to rate the library highly on a Net Promoter Score. 30% score as Detractors mostly based on <b>neutral</b> rather than negative experiences. Younger Australians 18-34 who visited the library are nearly twice as likely to be Detractors than Promoters, suggesting the on-site library experience is not living up to expectations for this age group.</p>
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# Executive summary – key insights

## GENERAL POPULATION (AUSTRALIANS 18+)

### Three key drivers

Reasons why people visit the National Library of Australia are varied, but general learning as well as leisure and entertainment were the most important drivers.

Leisure and entertainment<sup>^</sup>

General learning

Study / work research

<sup>^</sup>Includes visiting to socialise and as a tourist attraction

Study/work tasks did not rate as highly amongst the general population despite remaining important to current users\* and having a good natural fit with reference library resources overall.

### Learning from the GLAM sector

Qualitative feedback confirms museums and galleries showcase information and collections in a way that is easily digestible and able to be consumed ‘as is’. They are places to go without a specific goal or task in mind.

By contrast the National Library of Australia is seen as a place that requires work from the visitor to select and identify materials and resources. This can be seen as too hard, too unappealing or too difficult by new or unfamiliar audiences in particular.

Australians will need convincing that the National Library of Australia has easily accessible content and activities, similar to other GLAM institutions.

### Literary and cultural online resources

Looking at learning, literary and cultural online resources, usage remains low overall, although younger audiences are considerably more digitally engaged.

Half or more of young Australians are accessing these resources online. This includes online library catalogues, Digital Classroom and online reference library resources.

Young people are also the most likely age group to visit online arts events or exhibitions (37%).

All age groups access online bookshops although this decreases with age.

Ease of browsing and a greater variety of resources online are considered benefits of accessing these library / GLAM resources online.

\*As noted, Current Audiences are dominated by this driver, and interestingly study/work tasks were the most significant driver on-site at intercept interviews.

# Executive summary – key insights

## GENERAL POPULATION (AUSTRALIANS 18+)

<p><b>Use of the National Library of Australia’s online services</b></p> <p>The National Library of Australia’s online services do not achieve the national reach and engagement that might be expected.</p> <p>Just over quarter (26%) of Australians have heard of Trove, the National Library’s online catalogue or Copies Direct.</p> <p>Despite low levels of awareness and usage, views of the National Library of Australia’s catalogue are positive with library users mostly rating it better than competitors.</p> <p>Interestingly although young Australians 18-34 are not more likely to have heard of or used the National Library of Australia’s online services such as Trove, they are more likely to have used competitors such as Google Scholar.</p>	<p><b>Online access and search</b></p> <p>Qualitative feedback from focus groups suggests that a lack of profile and presence online, particularly in relation to Google search, is limiting opportunities to access the National Library of Australia’s online resources generally and specifically pathways leading to Trove and the online catalogue, but also to the website and events.</p> <p>In focus groups, new audiences claim <u>not to have seen</u> a National Library of Australia resource come up in a general interest Google search or even a Google search with an academic focus. This suggests the library’s SEO is not being maximised.</p> <p>Making it easy for mainstream audiences to navigate online resources is a key requirement to increasing digital engagement with the sector.</p>	<p><b>Channels and communication preferences</b></p> <p>The general population were asked about communication preferences and channels for the National Library of Australia in the qualitative focus groups. We can also reference data from the <a href="#">Australia Council for the Arts: Creating Our Future research</a> to inform communication channel strategies.</p> <p>Overall, Facebook is the most widely used platform, with YouTube also having fairly broad appeal. Usage of other platforms such as Instagram and Twitter vary greatly with age, with younger audiences much more engaged.</p>
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# Executive summary – key insights

## INTERCEPT INTERVIEWS

<p><b>Visitation drivers</b></p> <p>The main reason why people were at the National Library of Australia was for study/work reasons. Leisure and entertainment, as well as the cafe and bookshop, were common reasons to visit.</p> <p>While residents are more likely than travellers to visit the National Library of Australia for study/work, travellers are most likely to visit for leisure and entertainment.</p> <p><b>Usage occasions on-site</b></p> <p>A range of usage occasions were uncovered during intercept interviews:</p> <ol style="list-style-type: none"><li>1. One-hour express visit</li><li>2. Leisure or learning visit (&lt;2 hours)</li><li>3. Long study visit (3 hours plus)</li></ol>	<p><b>Usage occasions (continued)</b></p> <p>Most visits to the National Library of Australia are pre-planned, and 41% are solo visits. On average, visitors stay at the library for 2.4 hours.</p> <p><b>Strong competitors</b></p> <p>The National Library of Australia benefits from strong ACT visitation, but fares less well with travellers, who prefer competitors such as the Australian War Memorial, National Portrait Gallery and the National Gallery of Australia.</p> <p>Travellers opted to skip visiting the library mainly because of time constraints or because it wasn't part of their planned tour. Winning visitor time from leisure-providing competitors is critical.</p>	<p><b>Satisfaction</b></p> <p>Satisfaction with the National Library of Australia was high amongst the intercept visitors – significantly higher than the general population and comparable to the library's highly engaged users.</p> <p>Intercept visitors were most satisfied with the appeal of the space/building and the quality of collections and exhibits. However, the level of interest generated in a visit could be improved.</p> <p>The cafe is a strong cross-sell for the library. While only 19% specifically went to the library for the cafe, a third of all visitors used the cafe during their visit.</p>
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# Executive summary – key insights

## DIVERSITY GROUPS

<p><b>Aboriginal and Torres Strait Islander Peoples</b></p> <p>Awareness of the National Library of Australia is lower amongst Aboriginal and Torres Strait Islander peoples. However, knowledge and visitation of the institution is higher than average.</p> <p>With the exception of Ancestry.com, awareness of online services from the GLAM sector and the National Library of Australia is higher amongst Aboriginal and Torres Strait Islander peoples.</p> <p>Cultural heritage and background is highly valued, with community-based channels key sources of cultural engagement and expression.</p> <p>Whilst GLAM organisations are regarded as having an important role to play, most have experienced barriers to engaging with resources, activities or events, with cost the main issue.</p> <p>Awareness of the National Library of Australia’s cultural resources is low.</p>	<p><b>Culturally and linguistically diverse Australians</b></p> <p>Culturally and linguistically diverse Australians are more likely to know about the National Library of Australia. Satisfaction and advocacy is also slightly higher than average.</p> <p>With the exception of Ancestry.com, awareness of online services from the GLAM sector is higher amongst culturally and linguistically diverse Australians.</p> <p>Cultural heritage and background is highly valued, with cultural festivals and online channels key sources of cultural engagement and expression.</p> <p>Whilst GLAM organisations are regarded as having a role to play, most have experienced barriers to engaging with the sector to explore their cultural heritage, with a lack of awareness the main issue.</p> <p>There is a need for increased advertising and promotion to culturally diverse communities.</p>	<p><b>People living with disability</b></p> <p>People living with disability are more likely to know about the National Library of Australia. Satisfaction and advocacy is also slightly higher than average.</p> <p>With the exception of Ancestry.com, awareness of online services from the GLAM sector is higher amongst people living with disability.</p> <p>Of the three diversity groups, people living with disability are the least engaged with GLAM venues, with their disability significantly restricting visitation. The GLAM sector in general is not delivering a ‘best in class’ visitor experience, and engagement with on-site activities and services is low.</p> <p>Online is a different story with a large majority engaging with GLAM here due to accessibility. However, usage of the National Library of Australia’s digital services is very low and prompted interest is moderate (56%).</p>
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# Executive summary – key insights

## MARKETING SEGMENTS AND PERSONAS

<p><b>Segmenting Australians</b></p> <p>In looking at opportunities to increase audience engagement it will be important to segment Australians into relevant potential user groups.</p> <p>The current research from the general population survey has provided five broad user segments ranging from disengaged through to advocates.</p> <p>These segments were then further refined into 14 consumer personas based on age, gender, life stage, education and cultural background.</p> <p>Personas can be used to guide marketing messages and more accurately target product mixes to meet the needs of different Australians. Personas can also be linked to communication channel preferences to develop targeted social media campaigns.</p>	<p><b>5 consumer segments*</b></p> <ul style="list-style-type: none"><li>• <b>Segment 1 (20%)</b> Disengaged Australians who show very limited interest in engaging in GLAM or library services.</li><li>• <b>Segment 2 (21%) and Segment 3 (23%)</b> Mid-low interest and engagement in the sector. Segment 3 is an active growth segment who ‘wants to do more’.</li><li>• <b>Segment 4 (19%) &amp; Segment 5 (16%)</b> Highly engaged Australians who strongly support and know more about the National Library of Australia. Segment 4 is an active growth segment who ‘wants to do more’. Both segments are advocates for the library.</li></ul> <p><b>14 consumer personas*</b></p> <p>Further refined into 14 consumer personas using age, gender, life stage, education and cultural backgrounds.</p>
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The National Library of Australia can use audience segments created from the general population survey to develop overarching strategic goals across audience types.

The more refined consumer personas can be used to develop specific targeted and tactical marketing campaigns identifying relevant product/service offers and motivations to engage. Some channel preferences are also available for personas (particularly linked to age).

\*Dashboards have been created to reflect consumer segments and the refined consumer personas.



# Executive summary

Recommendations



# Overall recommendations to emerge from this research

1. Raise the profile and awareness of the National Library of Australia amongst all Australians.
  - This is first and foremost about an information campaign to ensure all Australians know the National Library of Australia exists and broadly its role and remit. From focus groups there was support for campaigns that 'get people talking' about the library as most people find it interesting that it is there, and surprising that they don't know it exists.
  - More targeted and specialist messages can then be directed at discrete audiences.
2. Commit to a clear brand positioning.
  - Preserving 'our national story' is seen as the National Library of Australia's core role and remit and is the unique selling point for the brand. Tone of delivery is very important and needs to be inclusive, reflective and feel relevant for all Australians. National representation is vital but also needs to be about 'our story' and 'my story', not the nation's and not the National Library of Australia's.
  - Consider the value of creating a personal or emotional connection with the library's resources. One powerful example of this from the research was in relation to personalising 'Australia's history' and 'your family history' in particular. There will also be other ways to achieve this.
3. Reduce barriers around being a reference library as this can raise questions for everyday Australians about why and how they might want to engage with library resources.
  - Communication and marketing messages should address barriers by positioning the library as a place for leisure and entertainment as well as general learning e.g. something you would choose to do in your leisure time.
  - GLAM activities are one way to achieve this, but there is more value in determining how to make core resources/collections accessible (given these are the unique selling points for the brand).

## Overall recommendations to emerge from this research

4. The core product focus should be on the unique collections and reference library resources offered by the National Library of Australia. These are not only extensive, credible and potentially unrivalled but also supported by staff, even online.
  - It is vital to present reasons to engage with these resources that create interest, relevance and challenge the perception that libraries are only for research and study.
5. Use market segments/consumer personas, market drivers and usage occasions to tailor and refine marketing campaigns.
  - Pair products/services with motivations to engage.
  - Tailor offers and messages to specific target audiences, including language, tone and positioning of the products on offer. Everyday Australians need everyday accessible language and messages, and ways to engage with the library that are familiar and recognisable.
  - Provide pathways in keeping with the segment the library is targeting. (Use channel and media preferences).
6. Review current pathways.
  - The website is not effective and is not easily directing users to services / resources of interest. It needs a navigational overhaul based on what has been learnt about motivations and consumer segments.
  - Specific services generated minor feedback in the current research and potentially need further investigation (e.g. How easy is the online catalogue to use? Are the wealth of resources available on Trove easy to find?).



## Overall recommendations to emerge from this research

7. Awareness, access and use of eResources need to be maximised. There is a natural fit between digitised collections / reference library resources and online delivery - the National Library of Australia's online catalogue, and Trove in particular. These are interesting and important to the brand.
  - Initial feedback suggests that significant SEO investment is required to increase the profile of the National Library of Australia's online catalogue and Trove resources. (Qualitative feedback suggests that these are not favoured in Google searches with competitor materials being much more likely to appear on page one).
  - Young Australians aged 18-34 years are a particularly important target group here as they are more digitally engaged with online literary and cultural resources, and show some preference for this channel in relation to GLAM content and resources.
8. Aboriginal and Torres Strait Islander peoples require a dedicated approach to materials and resources representing their cultural group. This requires staff representation for Aboriginal and Torres Strait Islander peoples and community consultation (in community locations) to ensure cultural representation is accurate and respectful.
9. For culturally and linguistically diverse Australians, the National Library of Australia should consider tapping into existing, and often extensive, community networks which already preserve and share cultural histories. These networks are often supported by a local library.
10. People living with disability need equal access to on-site and online resources as much as possible. Engage directly with industry stakeholders to evolve current approaches and bring the National Library of Australia in line with best practice.



# Research background

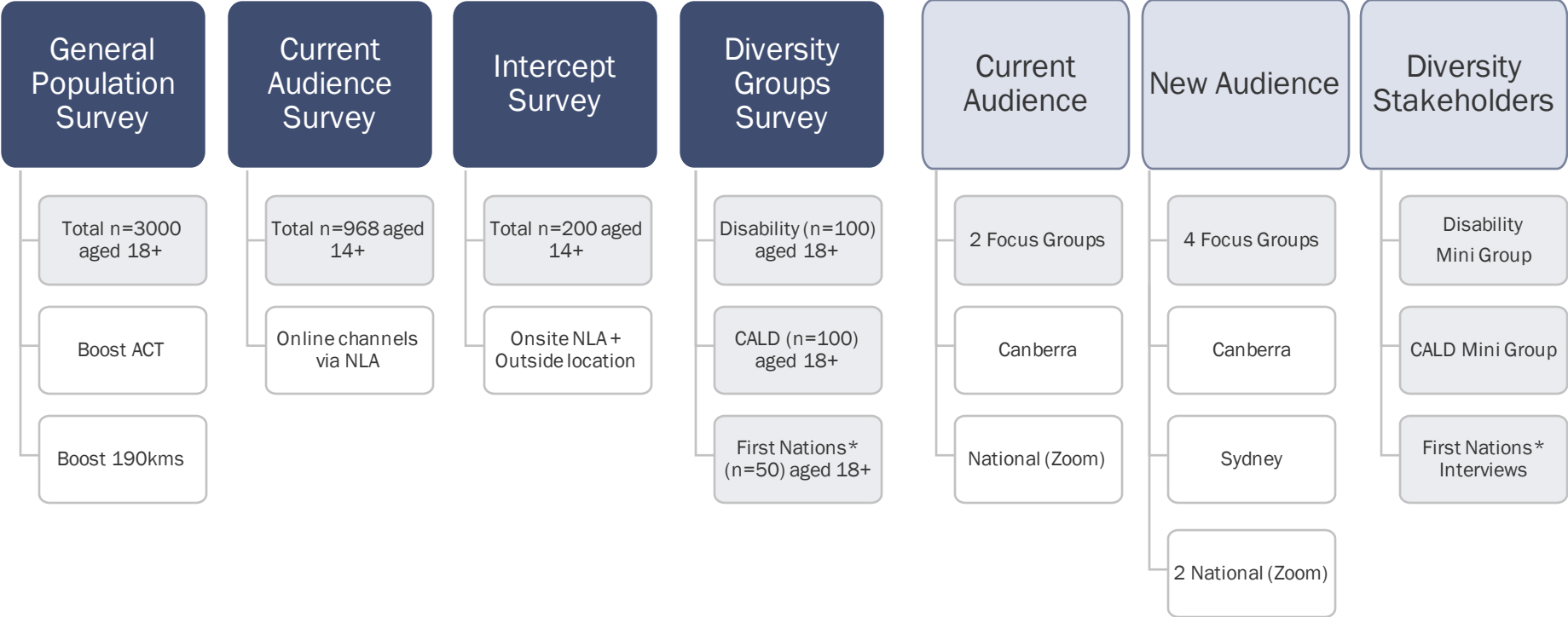
Objectives and methodology



# Seven components of research were commissioned by the National Library of Australia as part of this program of consumer research

## Quantitative data

## Qualitative data

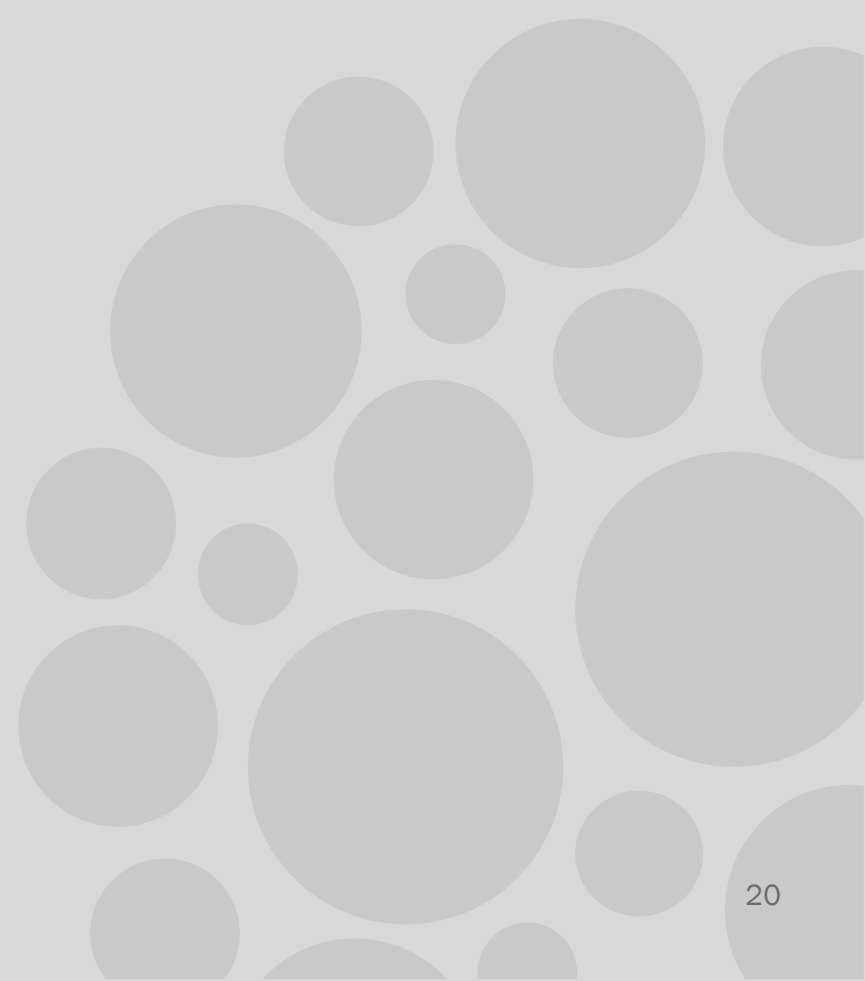


\*Throughout this report the terms First Nations and Aboriginal and Torres Strait Islander peoples are used interchangeably

***The program has led to a wealth of data that can be used to drive engagement strategies moving forward***



## General population survey



# 3.1

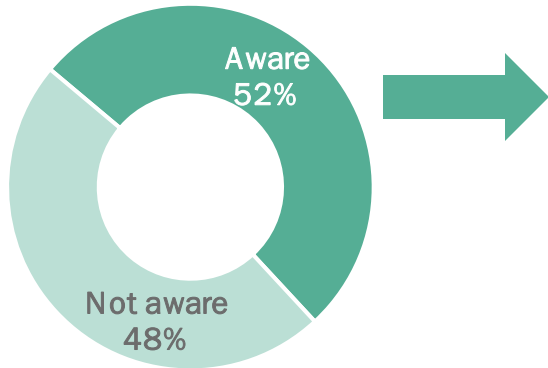
## Awareness

Although over 50% of Australians know the National Library of Australia many don't know much about what it does or what it offers for them. There is a real opportunity to get more Australians involved and informed.

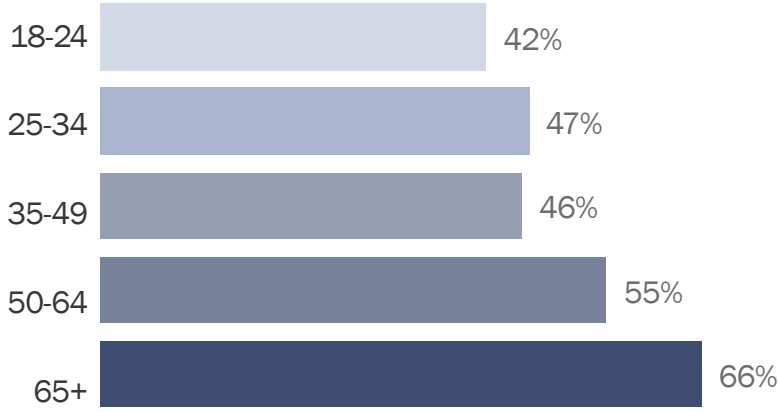
# Just over half of Australians have heard of the National Library of Australia

Older Australians are more likely to be aware of the institution, with awareness increasing with age

Prompted awareness of the National Library of Australia



Prompted awareness by Age



Awareness increases with proximity to the National Library of Australia's site in Canberra

Location	Awareness Percentage
ACT residents (90% aware)	90%
190 kms (66% aware)	66%
Rest of Australia (50% aware)	50%

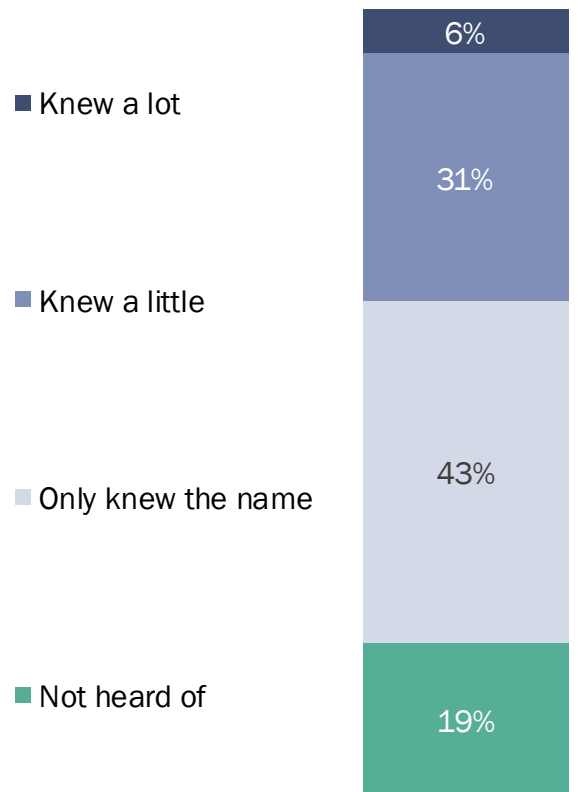
3 in 5 GLAM Visitors are aware of The National Library of Australia


59%

# Although 81% of Australians recognise the name of the National Library of Australia, only a small percentage know a lot about the institution

The fact that most already recognise the name provides a good foundation for comms activity

Knowledge and awareness of the National Library of Australia



 Awareness and knowledge of the National Library of Australia is consistent across Australian Metro and Non-Metro locations

 Those engaged with GLAM institutions were more likely to recognise the National Library of Australia and know a little about it (41%)

**There is a real opportunity to open a conversation with Australians**

# Whilst awareness of the National Library of Australia is lower amongst Aboriginal and Torres Strait Islander peoples, knowledge of the organisation is more detailed

## Other diversity groups also know more about the National Library of Australia

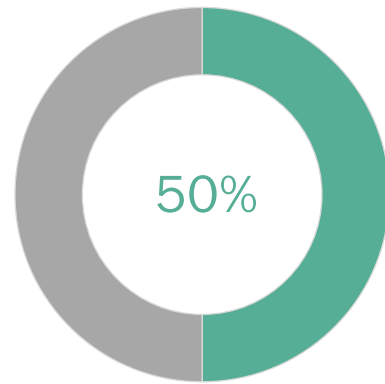
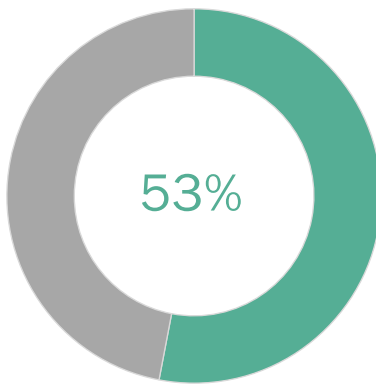
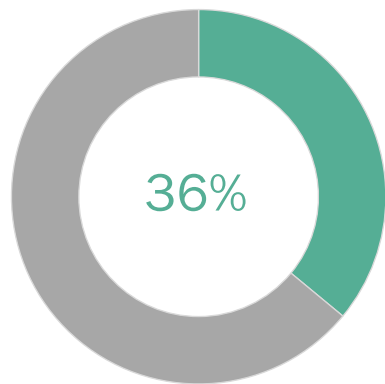
Prompted awareness and knowledge of the National Library of Australia

Aboriginal and Torres Strait Islander peoples

CALD Australians

People living with disability

Average Australian awareness  
52%



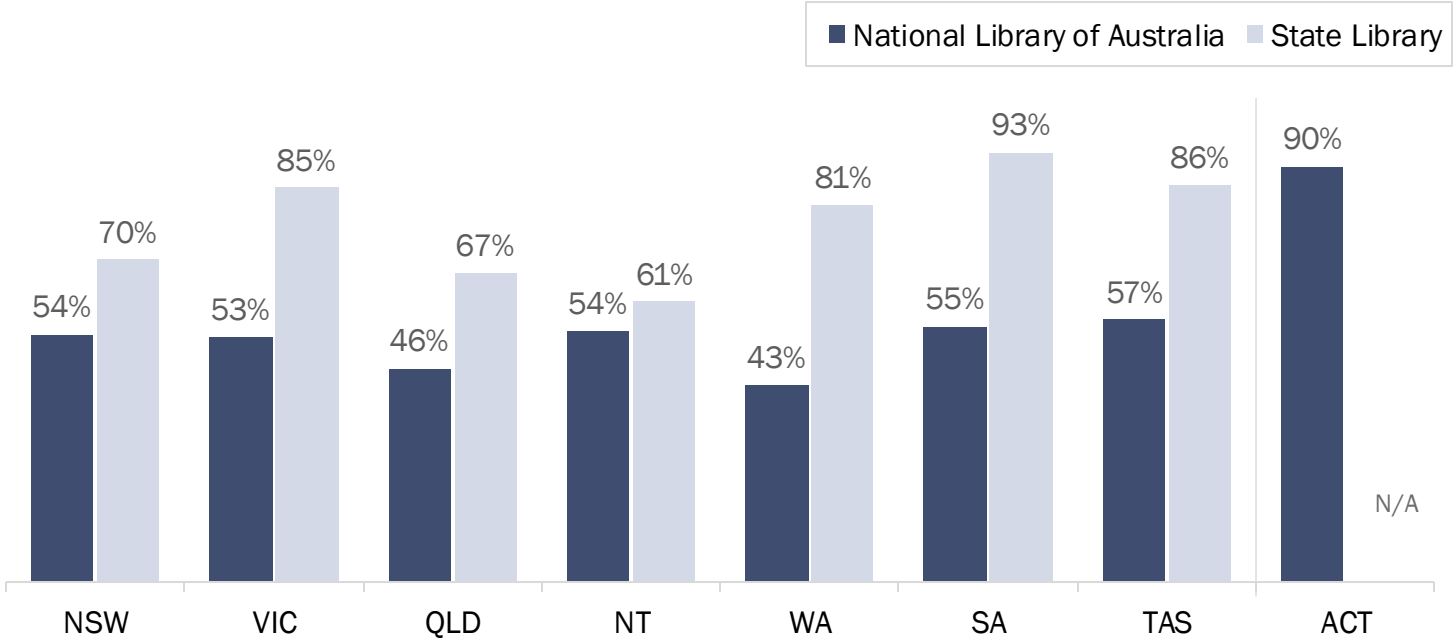
- Knew a lot
- Knew a little
- Only knew the name
- Not heard of



# Australians in all locations have higher awareness of their State Library than the National Library of Australia

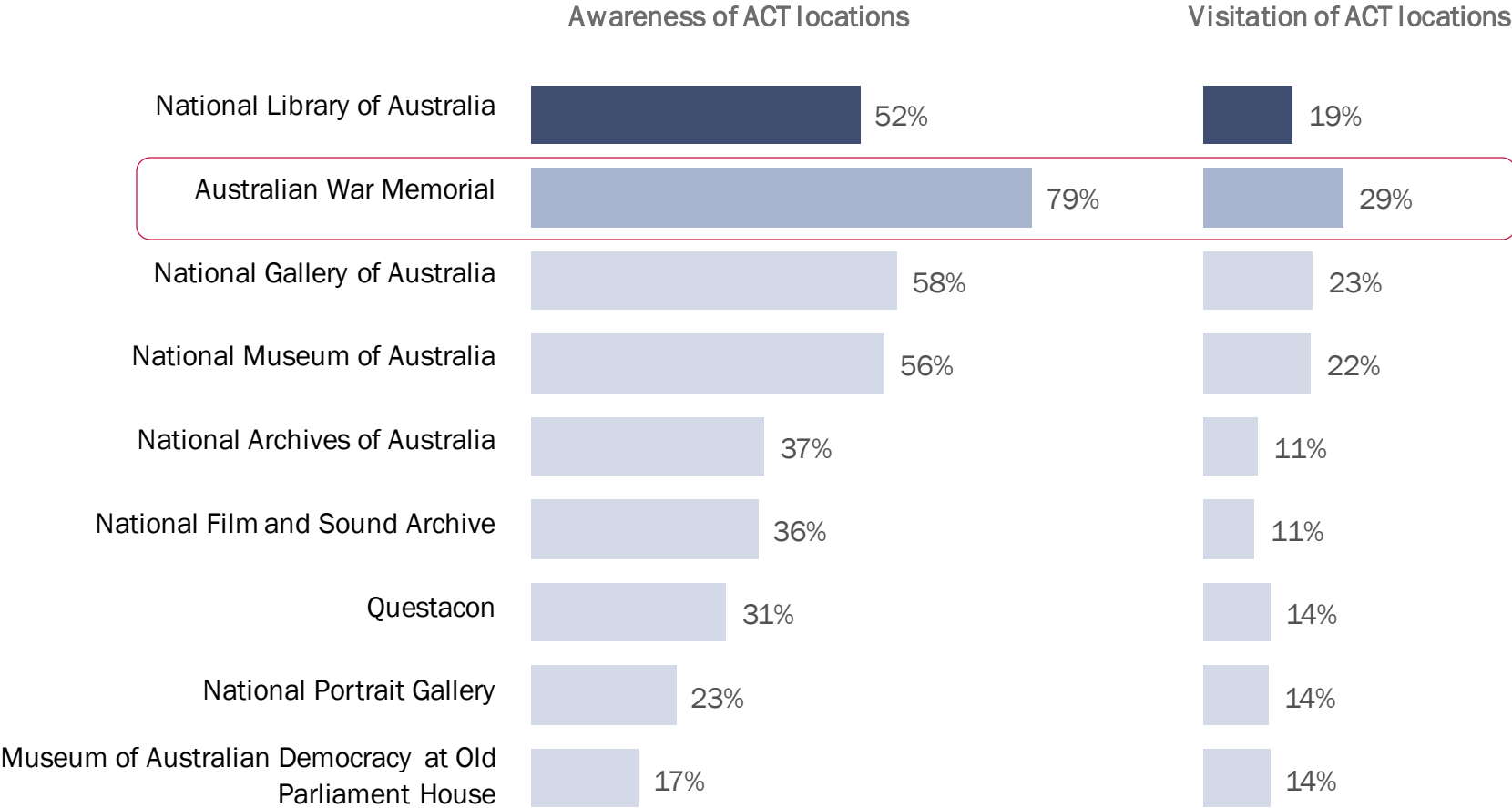
The gap in awareness is greatest in Western Australia and South Australia (both +38%)

Awareness of the National Library of Australia and state libraries by state and territory



**Connection to the State Library is highest in South Australia, Tasmania and Victoria – what can we learn from these similar institutions?**

In comparison to other national cultural institutions the National Library of Australia performs well but does not reach the awareness levels set by the Australian War Memorial



*Is this higher awareness a realistic benchmark for the National Library of Australia to achieve?*

# The Australian War Memorial appears to have connected emotionally with many Australians



Qualitative research reveals The Australian War Memorial has established a strong connection with many Australians around its national, yet personalised, stories:

- Whilst there are negatives associated with the story of war and Australia's history around this, it is also a story that connects strongly with Australians on a personal level.
- Many of the focus group participants talked about having a personal connection with soldiers / those serving Australia and The Australian War Memorial holds and preserves these stories.
- Being showcased on television and in the media twice a year consolidates the institution's important role, relevance and purpose to a national audience.

This is the only place that you can create your own story, because you can actually contribute to the museum. You can contribute to the art gallery with your stuff or whatever. And there are ways of actually telling your story, those places as well, but in a different way.

I've got people in the first world war and in the second world war, so there's things, it's a pleasure. There's lots to look at the War Memorial. So that makes it more interesting.

I think there's a part of our deep cultural history that's entrenched in the War Memorial and it's hard to fight that. I think people see the War Memorial in a very different light than they would see something like the National Library of Australia. And again, I think it comes down to often seeing the National Library of Australia as a place of work and seeing the War Memorial as a place of national reflection.

***Relevant 'stories' and an emotional connection to resources on show appears to be driving awareness and support***

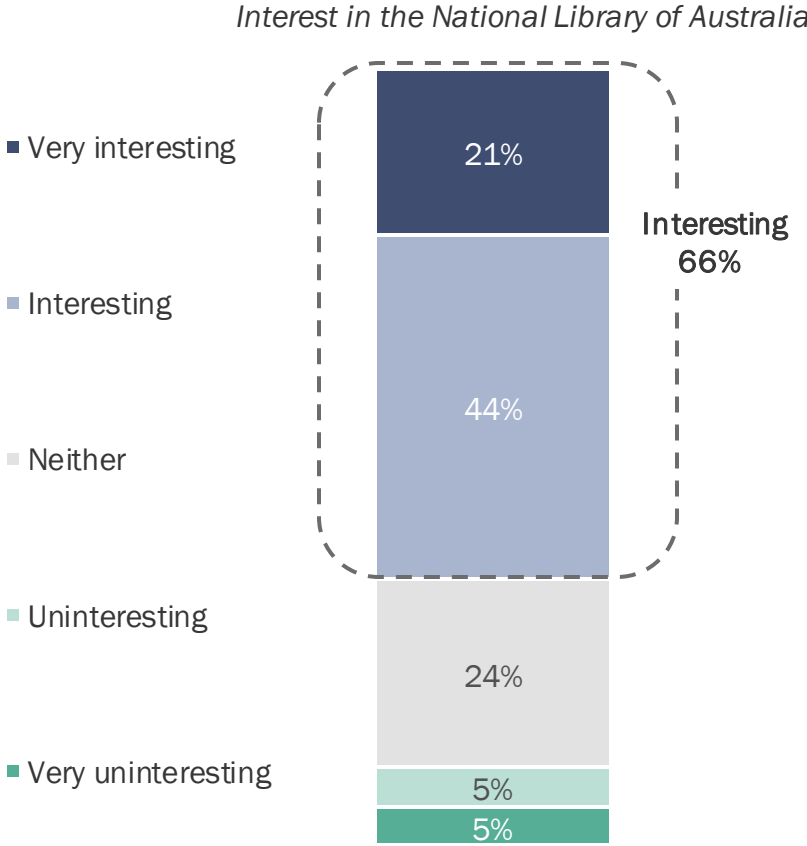
## 3.2

# Interest in the National Library of Australia

Australians are genuinely interested in the National Library of Australia's core role and remit and show support for what the library does and what it has to offer. However as a reference library it feels somewhat unfamiliar to many Australians who see it more as a place for formal engagements around study, work and research rather than entertainment. Holding Australian's stories and enabling access to Australian family histories offers an interesting reason to consider visiting or using the National Library of Australia.

# When told about the core focus and remit of the National Library of Australia, Australians respond favourably with two thirds showing an interest in what the library has to offer

Interest in the National Library of Australia is high, with two thirds of Australians finding it interesting



**Statement shown to general population survey respondents**

Located in Canberra, the National Library of Australia is one of the largest reference libraries in Australia. The library collects culturally and historically significant documents and publications, as well as educational and academic resources relating to Australia and Australians. The library's digitised collections are freely available online through Trove.

The National Library of Australia holds events and exhibitions to allow all Australians to discover their collections. They also offer services to assist with study and research activities.

**Capitalising on this interest will be important but may not be as easy as simply telling Australians you exist**

# Focus groups reveal that despite being supportive of a National Library and a national library collection, not everyone can see how they would connect or get involved



Qualitative research reveals there are barriers associated with reference libraries, and a national library in particular that will need to be addressed:

- Reference libraries are not seen as easily accessible or necessarily places ‘for me’
- Those who were not current users often talked about engaging with the National Library of Australia only if or when they had a formal research task in mind. They weren’t sure why else they would use the services.
- Many questioned how they would use the library’s resources if they were unable to borrow books as they would from a regular library.

I think perception is a very important thing. When I look at the National Library, just the word, without my experience of being here, what I'm thinking is I'm going there to research and study and go to do something serious. When I'm thinking about museum or gallery, I can just pop there and then have fun. I can bring kids. I can just be there and enjoy it without any plan.  
*New audience Focus Group.*

I haven't been to the National Library in a while, so I don't know what the use is at the moment. You probably wouldn't pop down and borrow a book. It doesn't feel like somewhere as casual as your local library, like you'd expect it to have more history, and less Roald Dahl or Harry Potter or Twilight.  
*New audience Focus Group.*

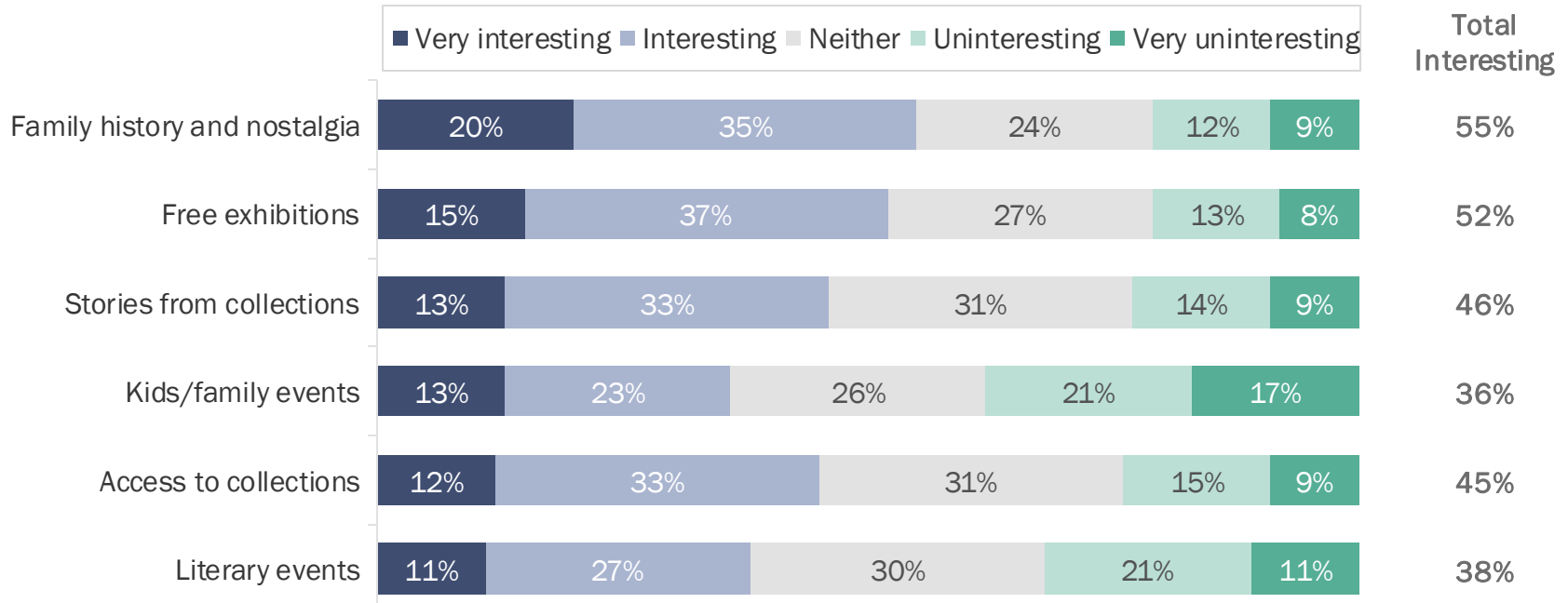
So it's getting your head around what the national library is about really and why I'm going there?  
*New audience Focus Group.*

For me, I thought that the National Library wasn't so open to the public, I guess. So I guess it needs a special reason to go there.  
*New audience Focus Group.*


***This suggests new users will need familiar and easy pathways and clear reasons to engage with what is on offer***

# Two of the presented activities stand out as key opportunities for the National Library of Australia: *Family history and nostalgia* and *Exhibitions*


Interest in the National Library of Australia's offerings



Interest in **kids/family events** is higher amongst parents, at 62%



Those aged less than 35 are most interested in **free exhibitions** (57%)



# Focus groups confirm Australians are interested in stories relevant to them, their families and their history - and this might be a way to engage them in what the library has to offer



## Qualitative research feedback:

- In focus groups, participants showed a real interest in how the National Library of Australia collects and preserves Australia's history through written documentation and beyond.
- Many participants quite easily saw how the library's historical collections might relate to them personally, particularly when they understood the scope of resources and history collected.
- Most were surprised at how comprehensive collections were (e.g. 'every Australian book published', 'largest collection of sheet music', 'all newspapers') and were not aware that the library's collections go beyond written materials to include audio and visual resources.

I think creating experiences for Australians would be good...you know, like finding out your family history, like if they really turn that into an experience with people to go and be able to, you know, see what ship their great great grandparents came on, or you know, with the newspaper thing, like you can go and see the newspaper that was on the day you were born. Just like creating experiences for Australians that would get them in the door and then in that way they can experience the library as a whole. *New audience Focus Group.*

I could see, like, letters from soldiers from World War II being of interest or something that sticks in the Australian mind and having that in letter form or book form. *New audience Focus Group.*

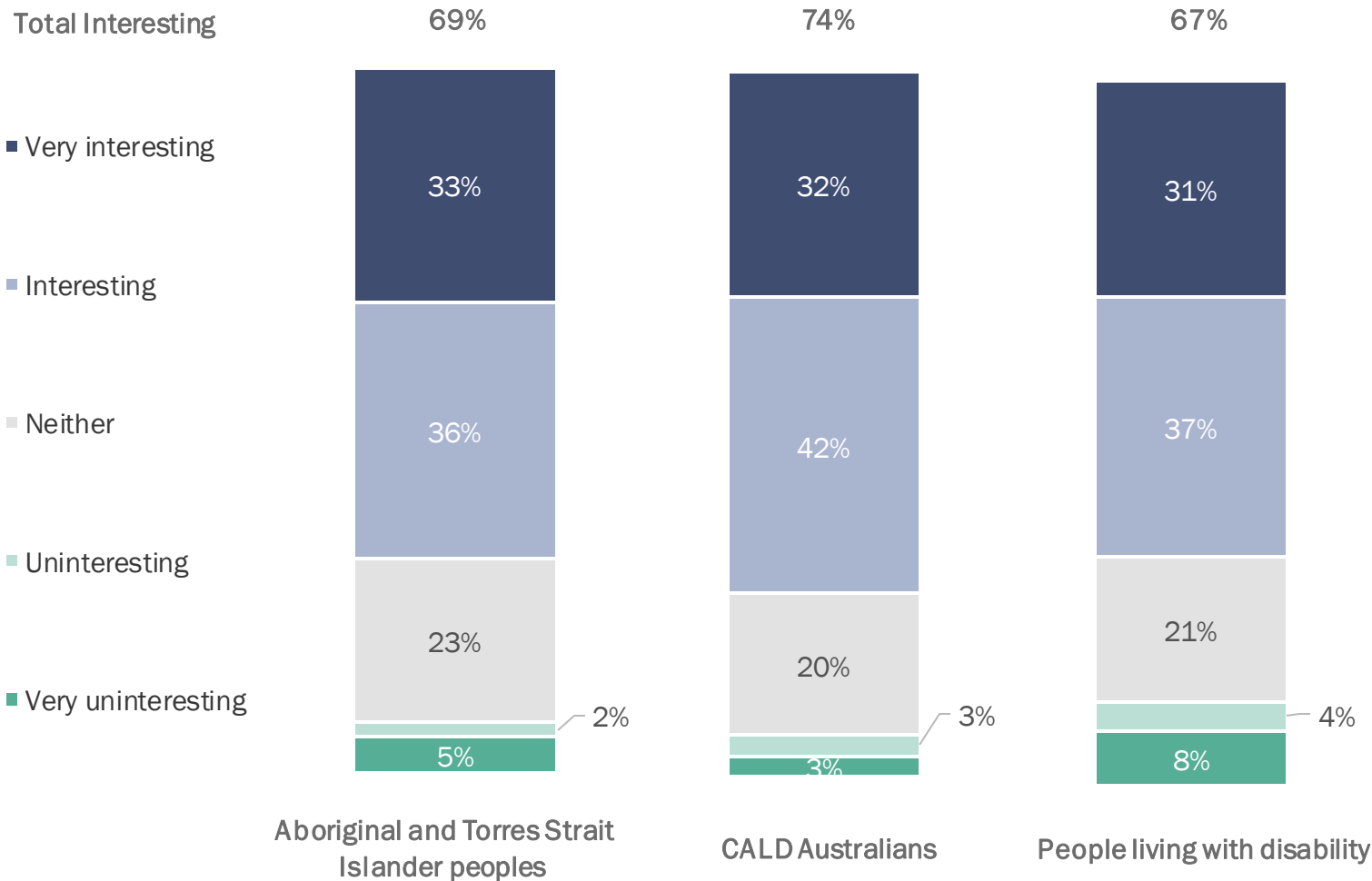
I think connecting with Australians is definitely where their strength should be. *New audience Focus Group.*

***Having access to Australia's history through collections and resources is interesting, but having access to 'my family's story' is possibly even more so***



Across diversity groups, overall interest is on par with the general population (66%), but a larger proportion of each diversity group rate the library 'very interesting' (Gen. Pop. 21%)

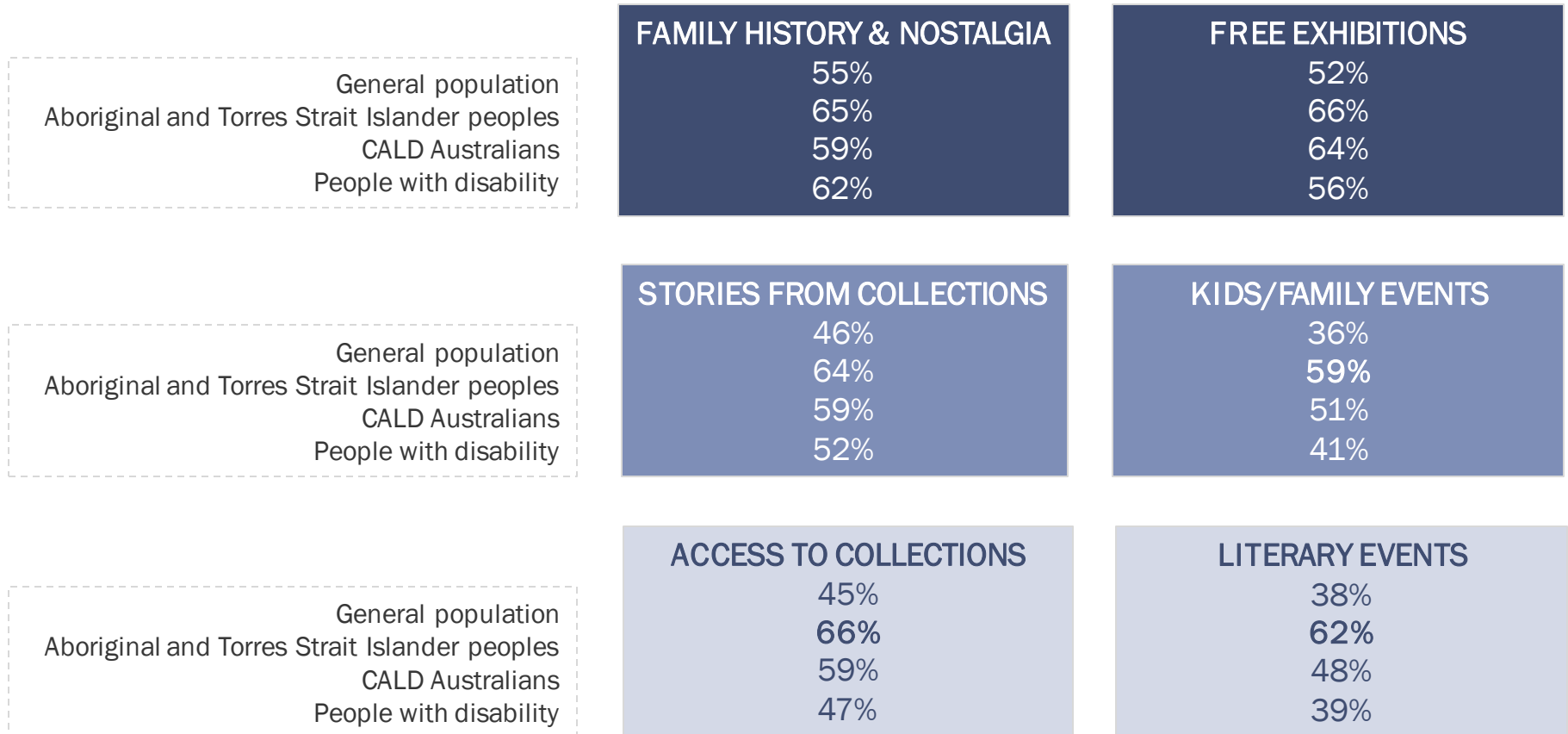
Interest in the National Library of Australia



# Interest in each of the National Library of Australia activities that were presented are also higher across the diversity groups

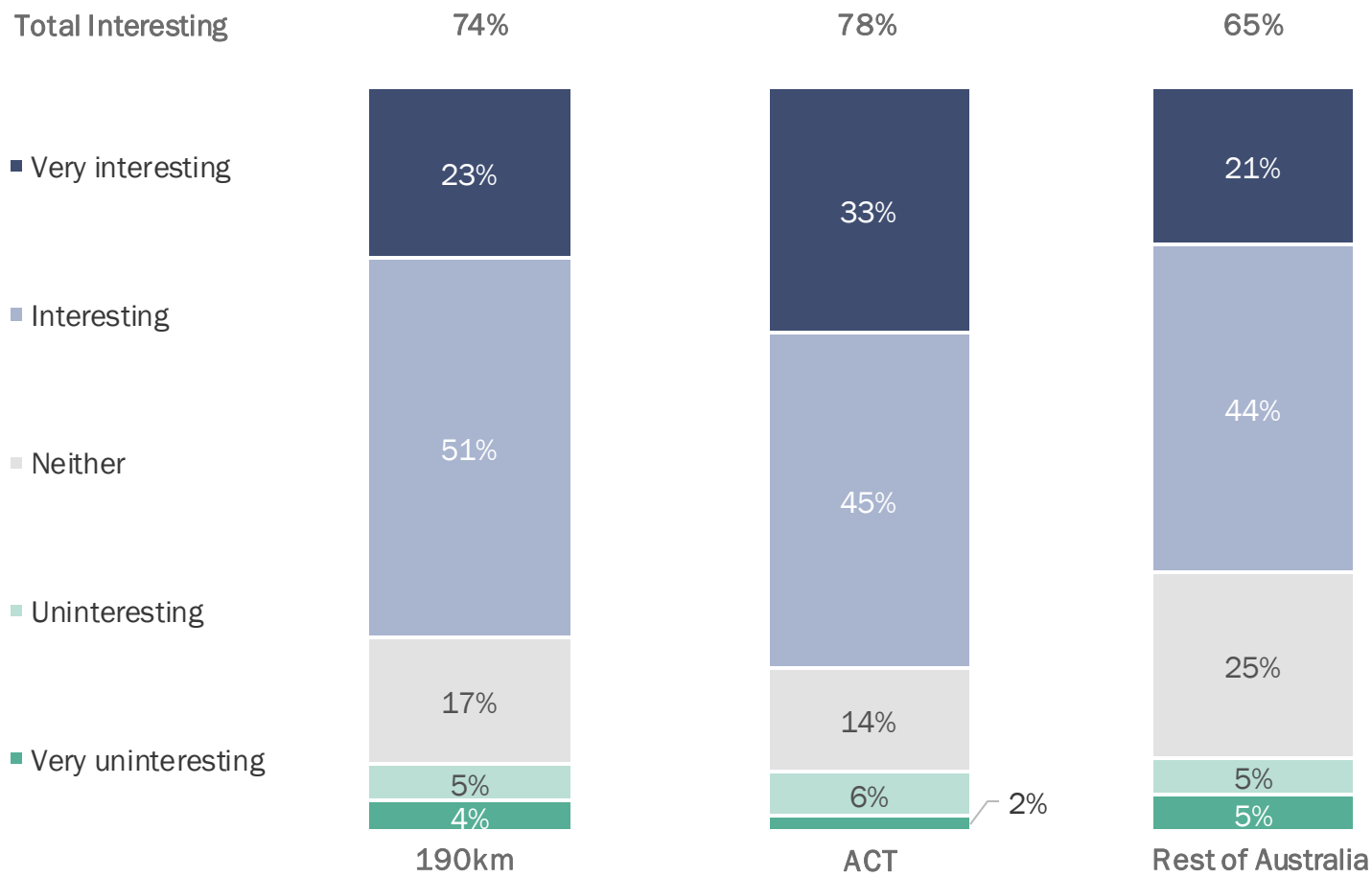
This is especially true for First Nations peoples, with interest more than 20% higher in three activities (kids/family events, access to collections, literary events)

*Interest in the National Library of Australia's offerings*



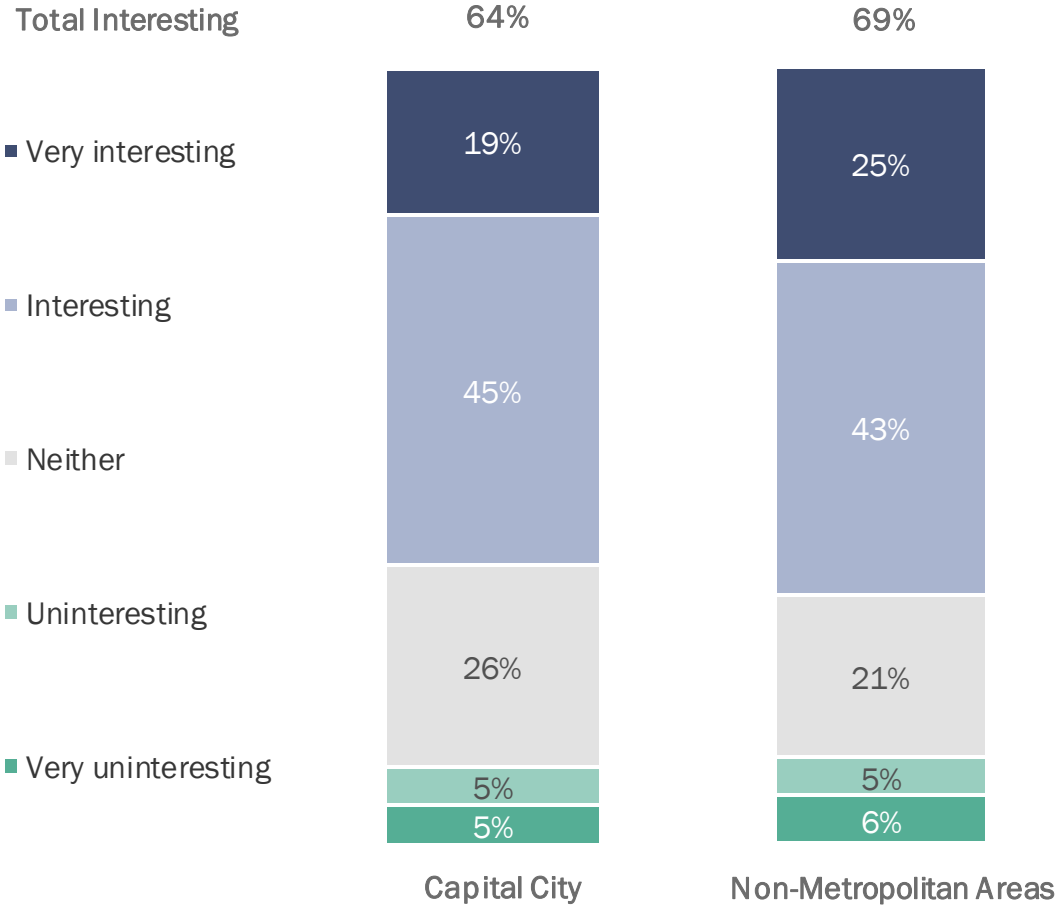
Interest is also higher amongst those in closer proximity, ACT residents in particular but also those living within a couple of hours drive

Interest in the National Library of Australia



# Interest in the National Library of Australia is significantly higher outside capital cities, with a quarter of Australians in non-metro areas seeing the library as ‘very interesting’

Interest in the National Library of Australia



## 3.3

# On-site visitation and drivers

Who and why Australians visit the National Library of Australia is varied, however both leisure/entertainment and learning/study drivers emerge as relevant. There is a difference however between general learning and a study/work related task. Grouping drivers has some value as it will allow the National Library of Australia to think more broadly about visits and how to trigger engagement versus competitors also vying for audience time.

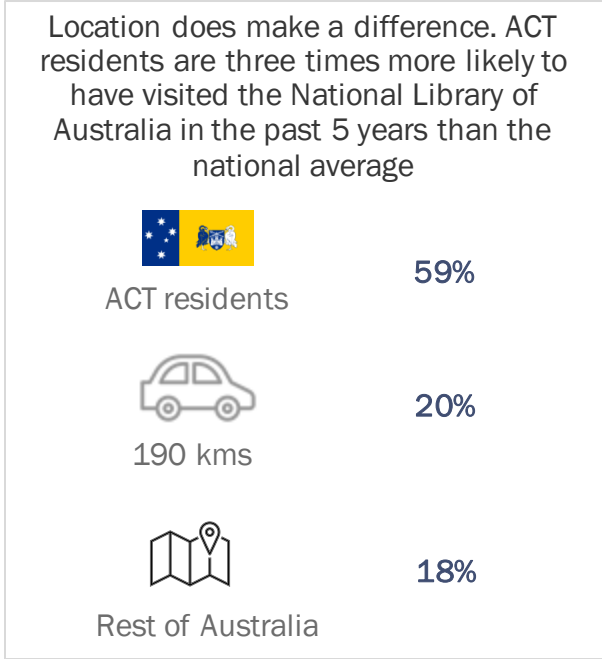
Drivers are further explored in Intercept Interviews (Section 5) where we look at how drivers result in very different usage occasions where users have different wants, needs.

# One in five Australians have visited the National Library of Australia on-site in the past five years (19%)

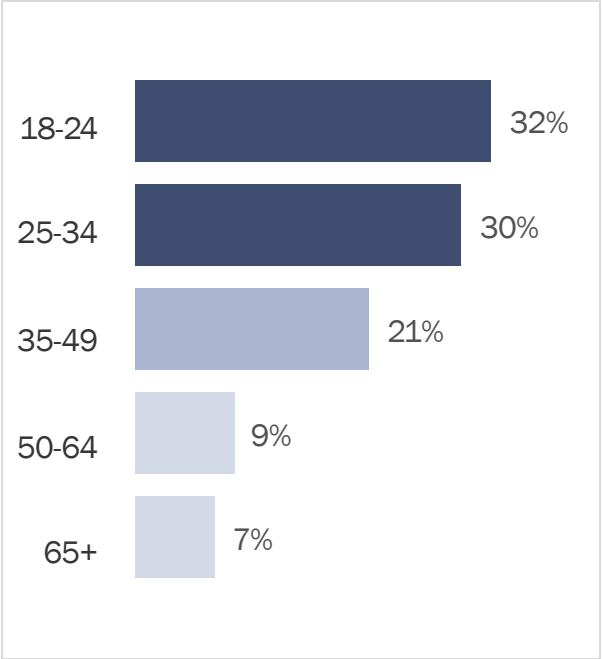
Whilst younger cohorts are the least likely to have heard of the National Library of Australia, they are the most likely to have visited in the past five years

Visitation of the National Library of Australia in the last 5 years

### By location



### By age

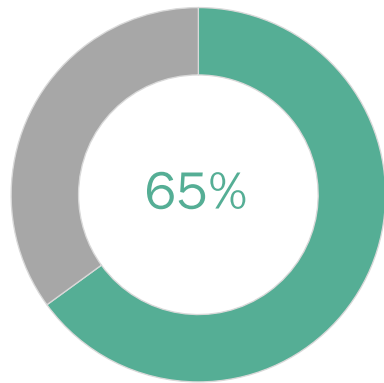


**Young people are an important audience who are likely to connect with the National Library of Australia for both academic and social needs**

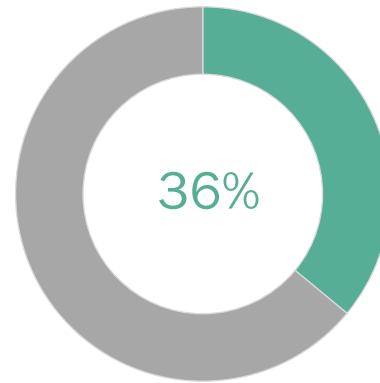
# Visitation is much higher amongst all three diversity groups, particularly Aboriginal and Torres Strait Islander peoples

Visitation of the National Library of Australia in the last 5 years

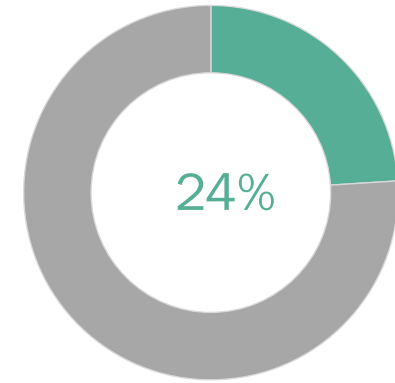
Aboriginal and Torres Strait  
Islander peoples



CALD Australians



People living with disability



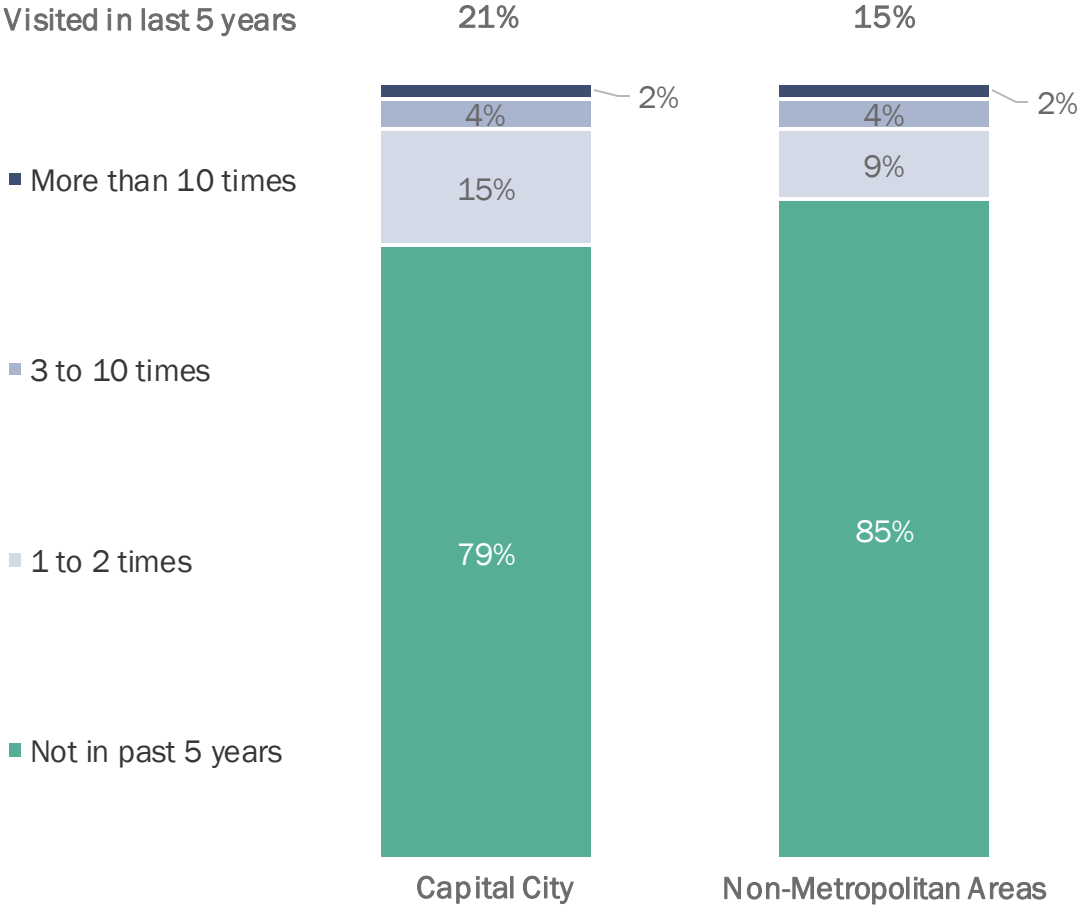
Average  
Australian  
visitation  
19%

Qualitative research reveals a significant opportunity for the National Library of Australia to take a leadership position in truly creating an institution that meets the needs of all Australians. Not only in terms of the materials within the collections, but also with regards to:

- Engaging diversity sectors in the curation of collections, exhibitions and events
- Ensuring the physical space of the National Library of Australia delivers a first class experience to visitors with additional needs and caters for specific diversity groups.

# Although Australians in non-metro areas have higher levels of interest in the National Library of Australia, they are less likely to have visited

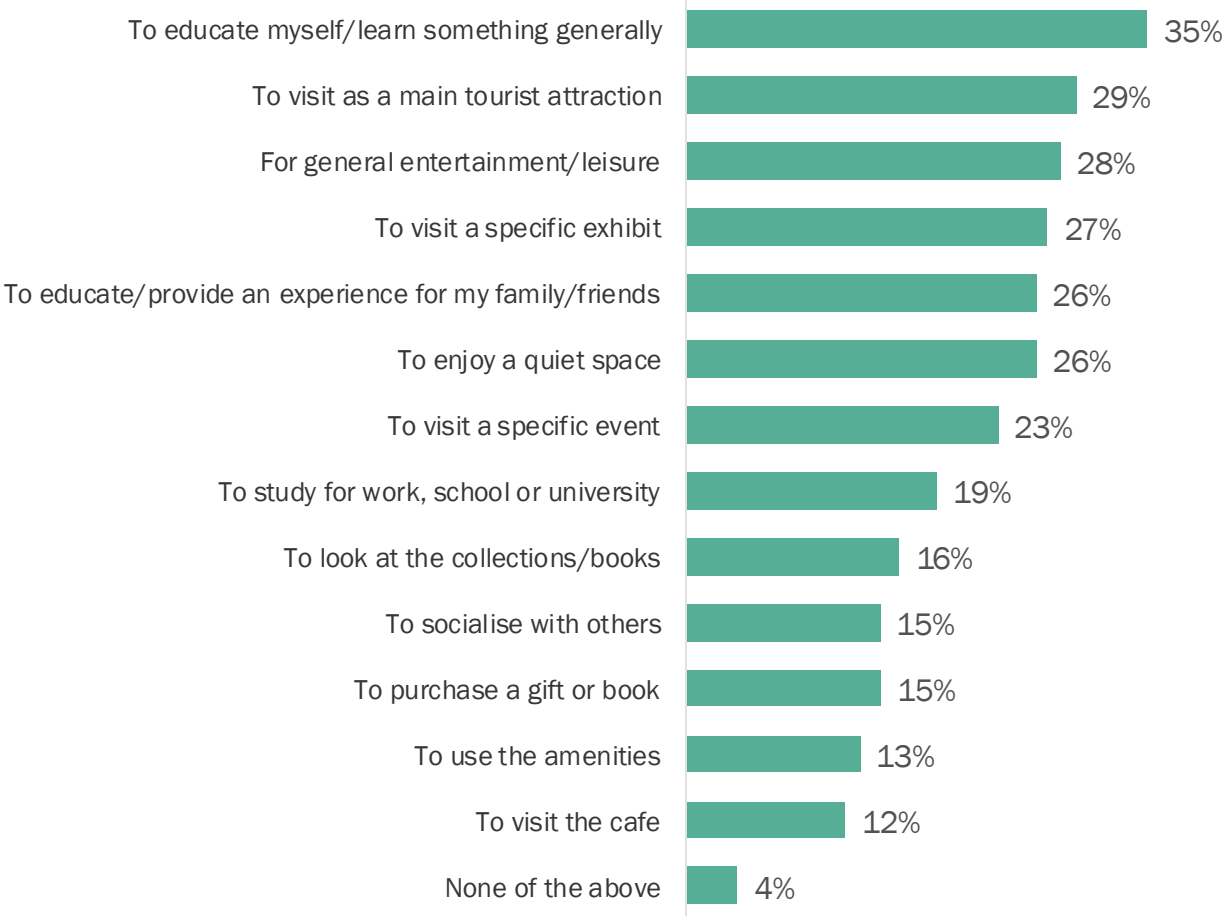
Visitation of the National Library of Australia in the last 5 years





# To educate myself/learn is the single most important visitation driver for the National Library of Australia, however leisure/entertainment is also key. Work/study ranks lower

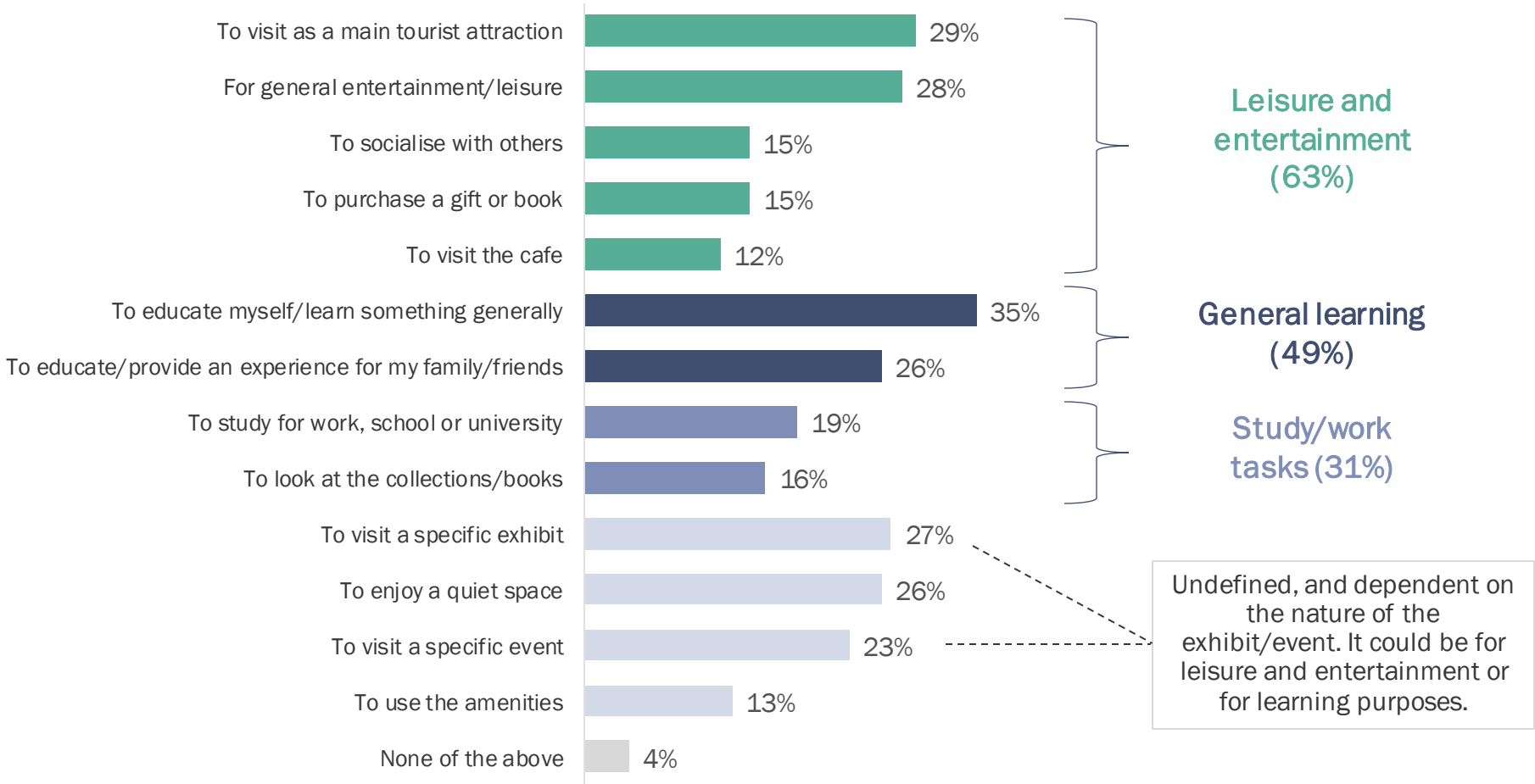
Reasons why Australians visit the National Library of Australia



***Positioning a visit to the National Library of Australia as an enjoyable leisure experience has the potential to engage audiences as much as the idea of learning***

# Grouping drivers has some value as it will allow the National Library of Australia to think more broadly about visits and how to trigger engagement versus competitors

Reasons why Australians visit the National Library of Australia



**General learning and education is important however leisure and entertainment may have greater scope and trigger more occasions**

## Feedback from the focus groups adds context and a couple of important points to what has been found with regards to drivers



### Qualitative research feedback:

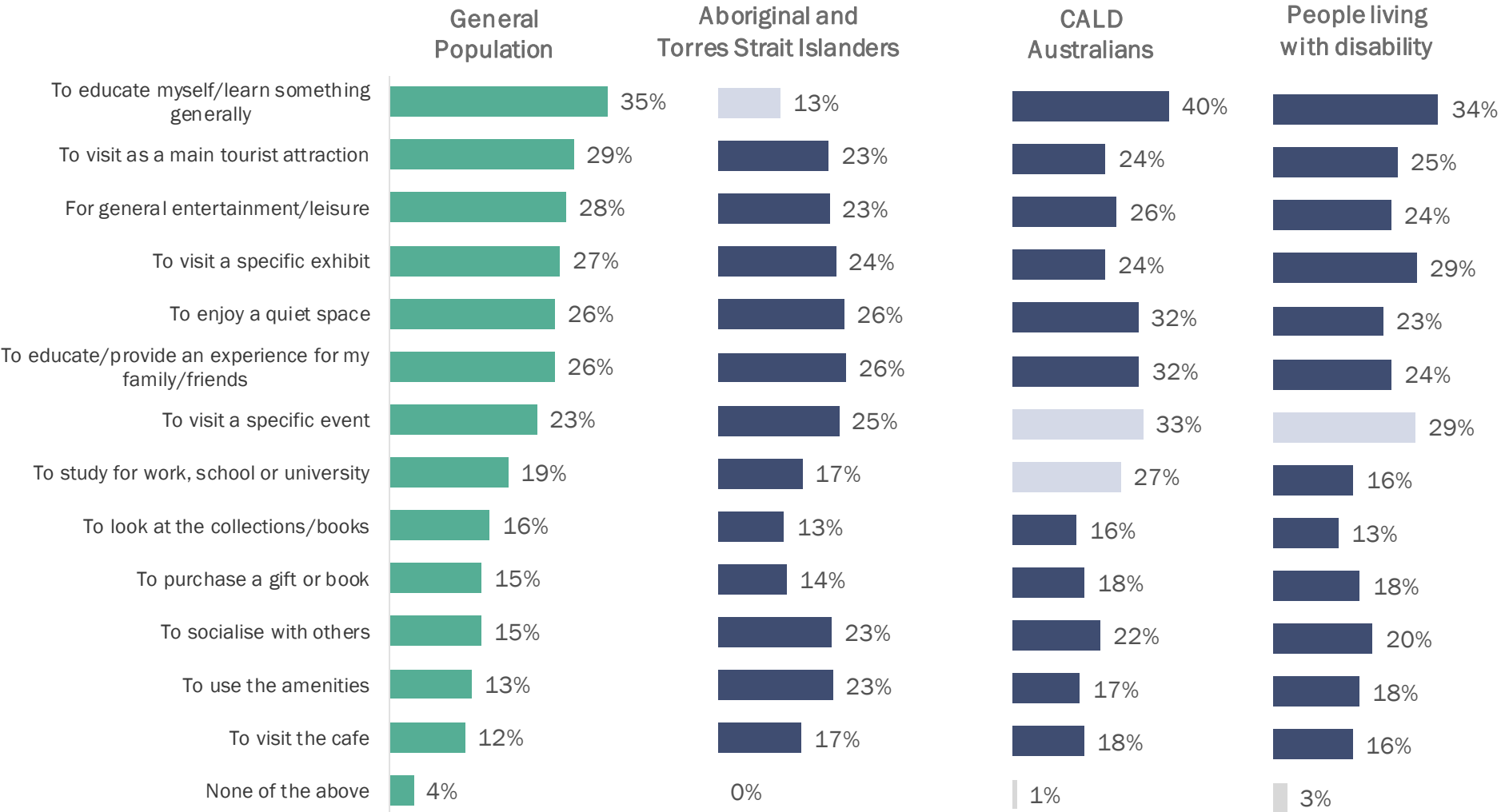
- Even when people are engaging with the National Library of Australia or other GLAM institutions (see Section 3.6) for the purposes of ‘general learning/education’, the experience needs to be positive and engaging. These visits are things people choose to do in their leisure or spare time and the National Library of Australia will need to compete with other leisure activities and things people choose to do when not working/studying. This will include other activities that might also offer a ‘general learning/educational’ experience, but may also include more general entertainment choices.
- Whilst attending the National Library of Australia to fulfil a specific work/school/university task was noted by only 19% of visitors, qualitative feedback suggests the National Library of Australia’s services most easily fit with this activity. Perceptions amongst new users easily link reference library resources with specific study/work tasks, and users agree that the National Library of Australia’s services fit comfortably with work and academic study. Given this natural fit, ‘education/study tasks’ remains an important and key driver for the National Library of Australia.

***Better delivering to all three drivers (leisure/entertainment, general learning, work/study tasks) should drive strategies moving forward***

# Looking at differences between diversity groups, drivers of visitation to the National Library of Australia are largely consistent

There are some differences, highlighted below

Reasons why Australians visit the National Library of Australia



# 45 Proximity makes a difference, and for those living close by a specific exhibit can motivate a visit more so than any other reason

Regardless of proximity general education / learning (but not formal study) is a key reason to visit

TOP 5 reasons why Australians visit the National Library of Australia

 ACT residents

To visit a specific exhibit	45%
<b>To educate myself/learn something generally</b>	37%
To visit the cafe	34%
To visit a specific event	34%
To look at the collections/books	31%

 190 kms

To visit a specific exhibit	45%
To visit as a main tourist attraction	37%
<b>To educate myself/learn something generally</b>	37%
To look at the collections/books	35%
For general entertainment/leisure	29%

 Rest of Australia

<b>To educate myself/learn something generally</b>	34%
To visit as a main tourist attraction	29%
For general entertainment/leisure	28%
To enjoy a quiet space	27%
To educate/provide an experience for my family/friends	27%

## 3.4

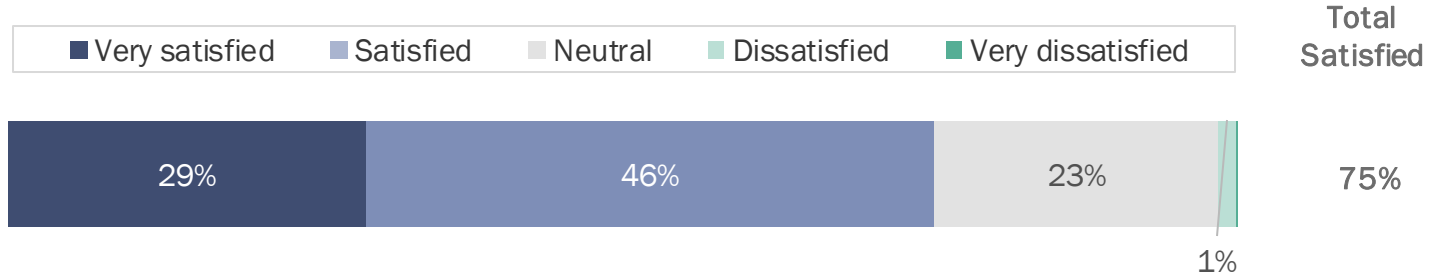
# Satisfaction

There is a big difference in satisfaction with the National Library of Australia when comparing responses from highly engaged visitors found in the Current Audience survey (see next section) and more occasional visitors in the general population survey. Whilst these more occasional visitors are also satisfied with services the National Library of Australia has to offer, they are less likely to promote the institution and may become Detractors given relatively neutral experiences.

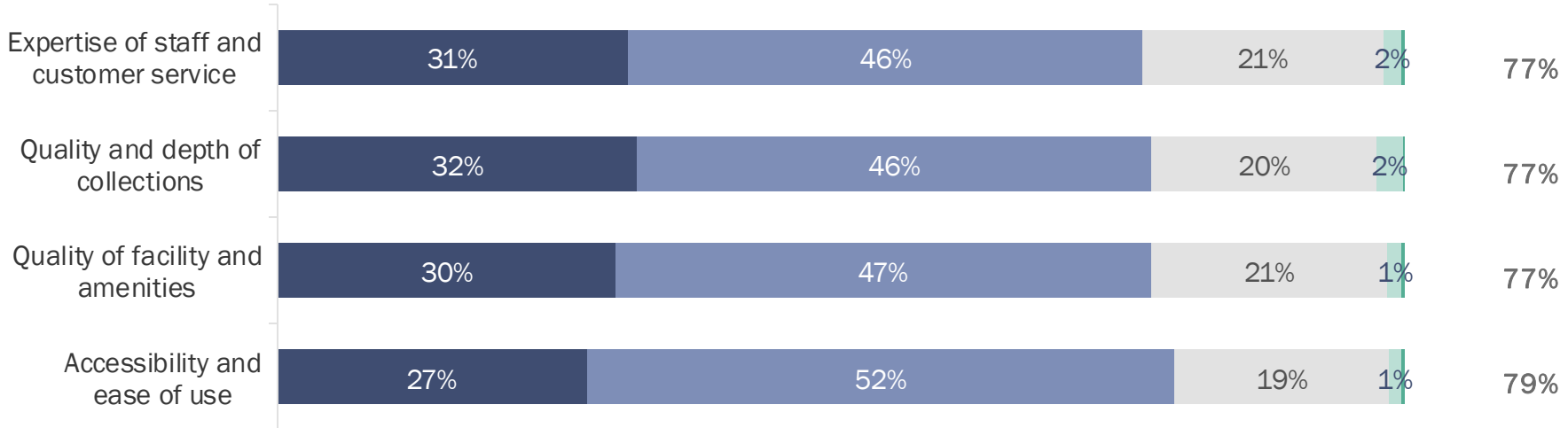
As noted, most visitors in the general population survey are satisfied with the National Library of Australia but a quarter are impartial which may hinder word of mouth support

Furthermore, less than a third are 'very satisfied' highlighting an opportunity to improve the visitor experience

Overall satisfaction with the National Library of Australia amongst visitors

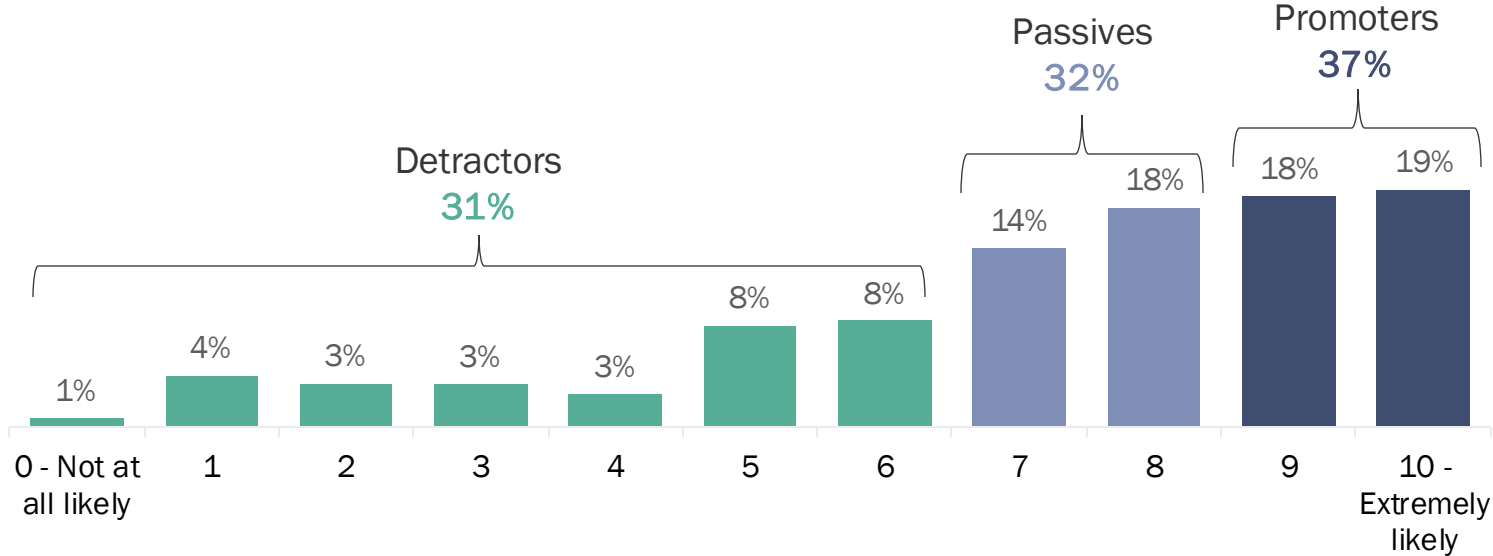


Satisfaction with the National Library of Australia's resources/service amongst visitors



# Moderate rather than high levels of satisfaction are reflected in the advocacy scores, with a third of visitors emerging as Detractors and only 37% as Promoters

Likeliness to recommend the National Library of Australia:  
respondents who visited NLA in the past 5 years



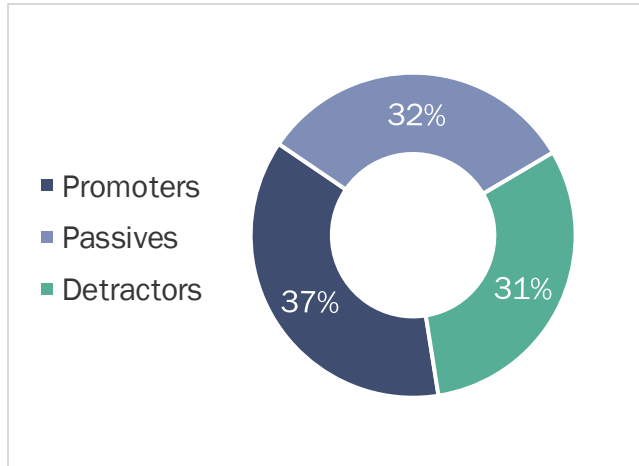
Net Promoter Score = Promoters - Detractors  
NPS = 6



# What can we learn about Detractors?

## DETRACTORS

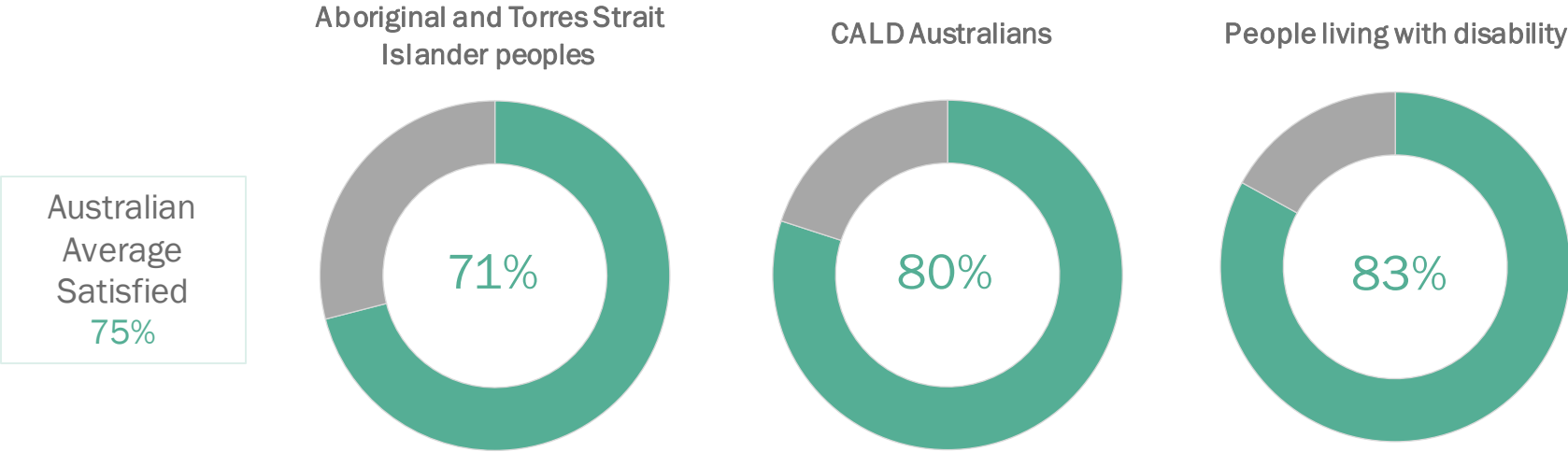
1. Don't visit GLAM institutions as much as other Australians.
2. Are the least frequent visitors to the National Library of Australia
  - Three-quarters had visited the National Library of Australia once or twice in the last five years
3. Are more likely to rate satisfaction with their visit as neutral compared to other visitors
  - 46% satisfied (all visitors 75%)
  - 49% neutral (all visitors 23%)
  - 5% dissatisfied (all visitors 1%)
4. Only 10% find the National Library of Australia 'very interesting', compared to 22% (population average).
5. **Younger Australians 18-34** are nearly twice as likely to be Detractors than Promoters (the opposite is true for older age groups) suggesting the experience is not delivering well to this age group.



*It is important that all visitors are engaged and inspired as neutral visits lead to low recommendation, endorsement and revisit*

# Satisfaction with and advocacy for the National Library of Australia is slightly higher amongst CALD Australians and people living with disability

Overall satisfaction with the National Library of Australia amongst visitors



Likelihood to recommend the National Library of Australia amongst visitors

	Total	Aboriginal and Torres Strait Islander peoples	CALD Australians	People living with disability
<b>NPS</b>	<b>6</b>	<b>2</b>	<b>9</b>	<b>12</b>
Promoters	37%	42%	39%	45%
Passives	32%	18%	31%	22%
Detractors	31%	40%	30%	33%

Q19. How satisfied are you with the National Library of Australia, overall? // Q22. How likely is it that you would recommend the National Library of Australia to a friend or colleague? Please answer on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely. Base: Those who have visited the National Library of Australia in the last 5 years from General Population Survey (n=712)

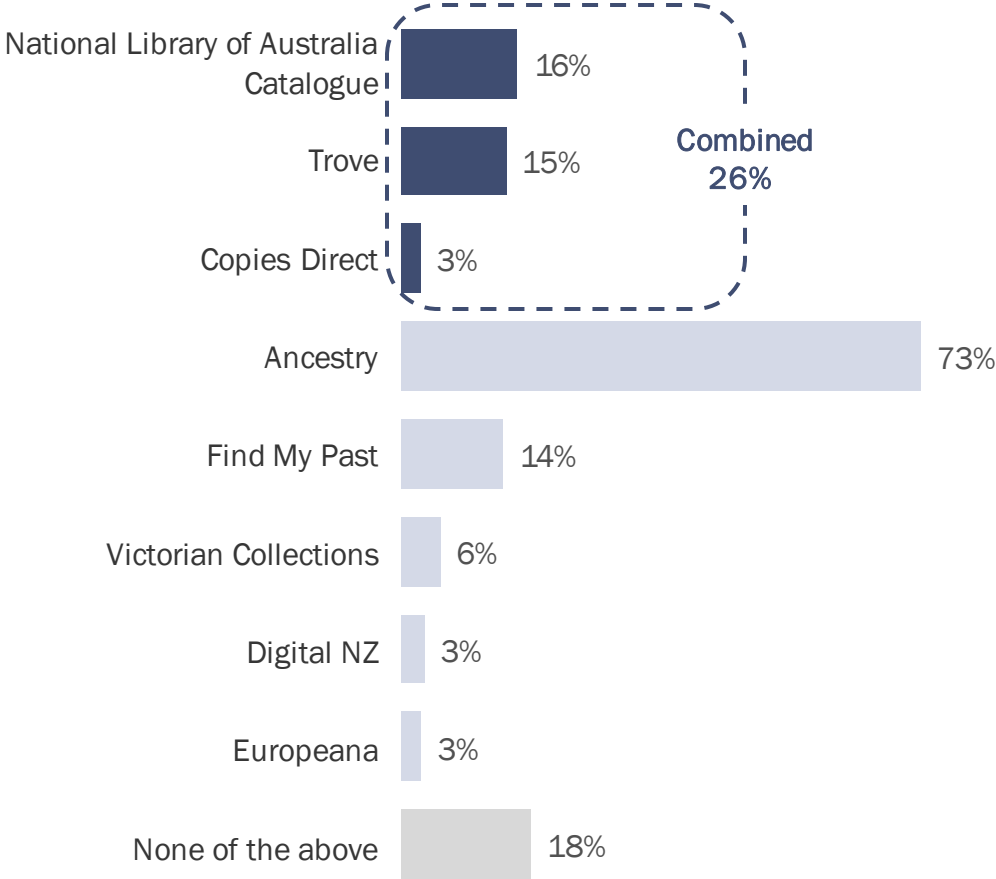

## 3.5

# Online access and activity


The National Library of Australia's online services are not achieving the national reach and engagement that might be expected. Better engaging Australians with the core online services offered by the National Library of Australia is the biggest opportunity to grow the brand. However these need to be marketed and targeted at key drivers and to offer easy to access pathways once target groups engage with these services.

# Only a quarter of Australians 18+ have heard of the National Library of Australia's online services (from a prompted list)


Prompted awareness of online resources

- Amongst Reference & Academic Library visitors, awareness of the library's services increased significantly:
  - National Library of Australia Catalogue (29%)
  - Trove (21%)
  - Copies Direct (7%)



Those engaged with GLAM institutions were more likely to be aware of the National Library of Australia Catalogue (23%)



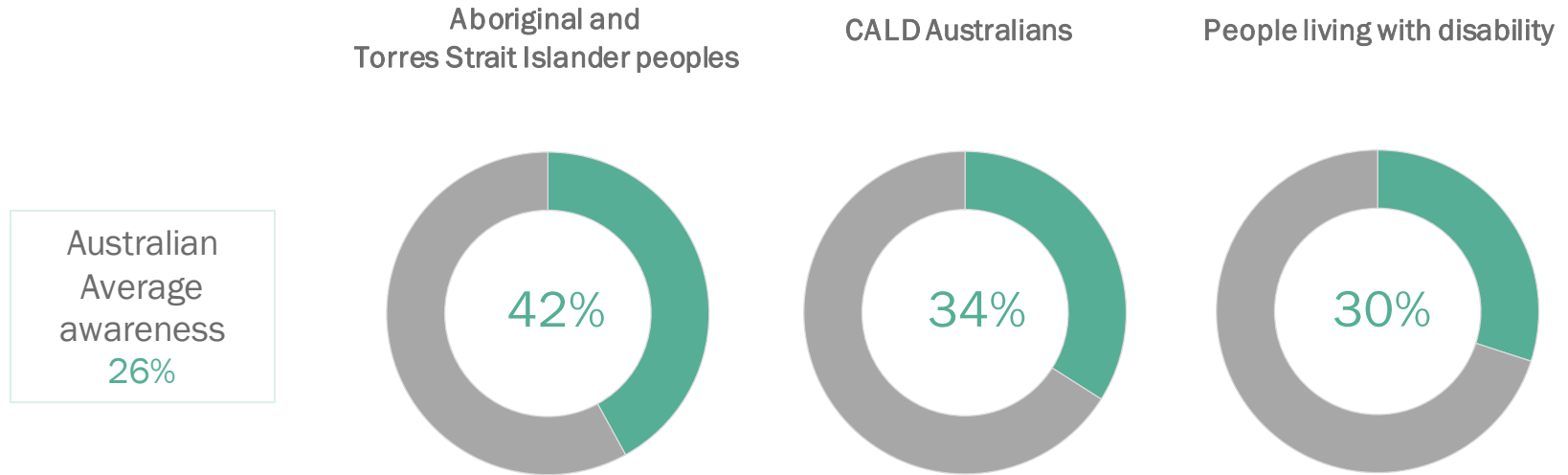
Whilst awareness of the National Library of Australia Catalogue and Copies Direct are consistent in capital cities compared to the rest of Australia, awareness of Trove is higher in non-metro areas

**There is a real opportunity to raise awareness of these core services**

# With the exception of Ancestry.com, awareness of all the presented online services is higher amongst the diversity groups

## First Nations peoples are most likely to be aware of the National Library of Australia's online services

Prompted awareness of the National Library of Australia's online resources

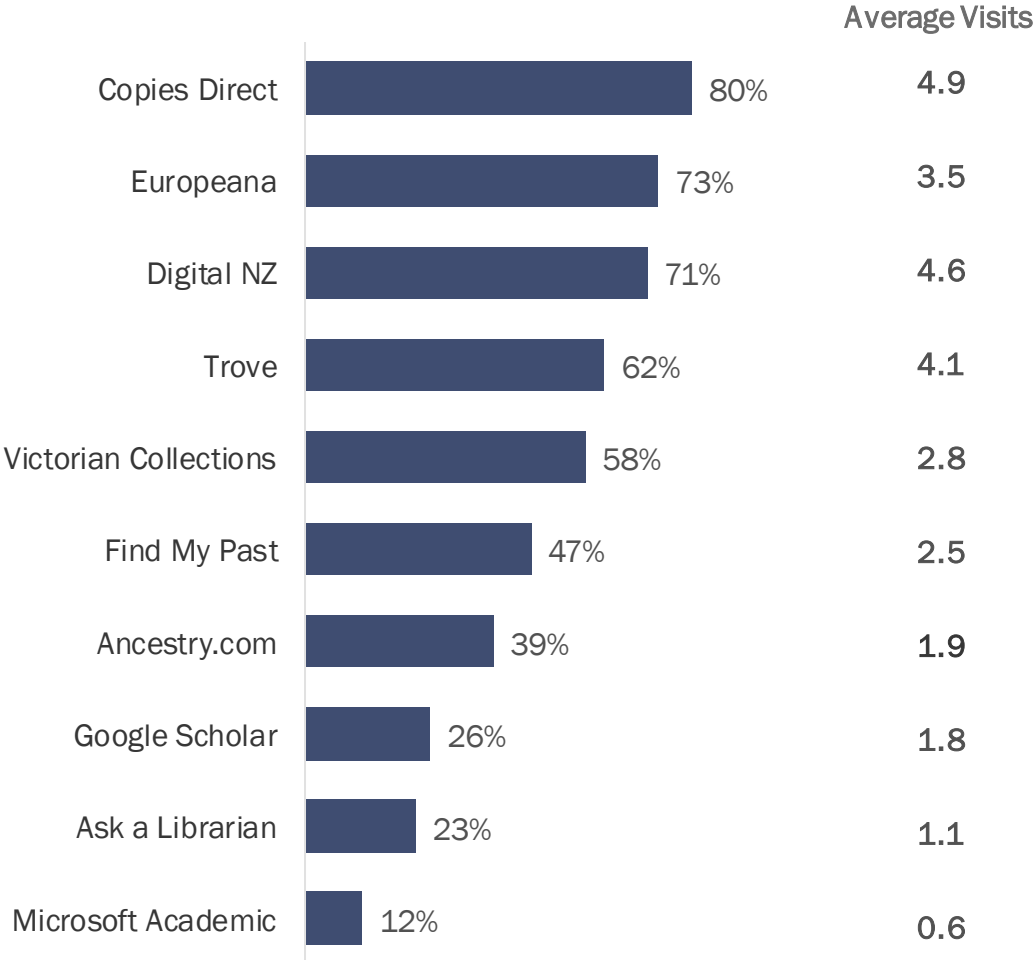


	Total	Aboriginal and Torres Strait Islander peoples	CALD Australians	People living with disability
NLA Catalogue	16%	28%	25%	19%
Trove	15%	13%	14%	15%
Copies Direct	3%	17%	9%	6%

While Ancestry.com was an online resource heard of by most Australians (73%), it was one of the least accessed (39%) by those aware of it

Conversely, there is much lower overall awareness for Trove (15%), but usage is relatively high (62%)

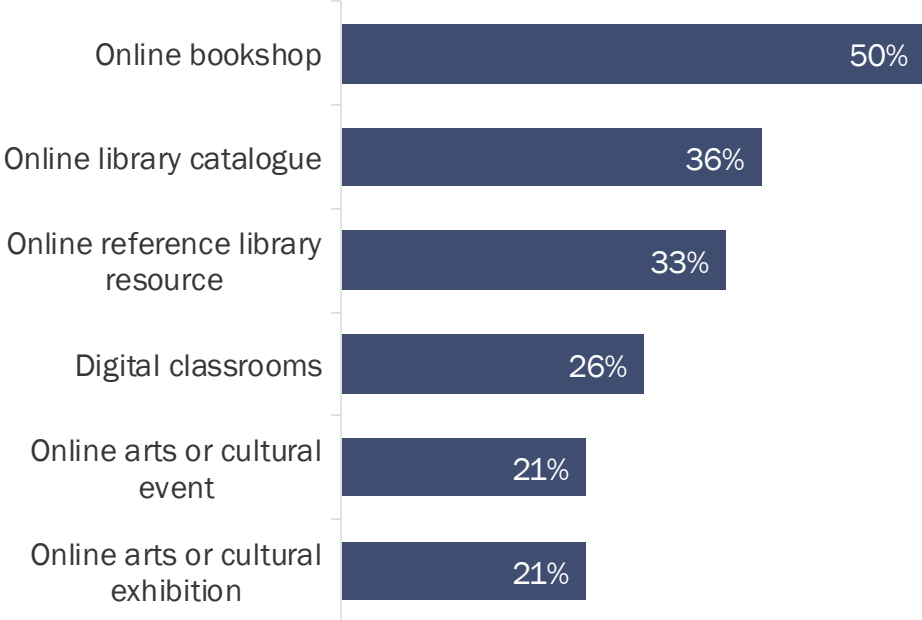
Online resources accessed in the last 5 years –  
by those aware of the online resource




# Looking at other learning, literary and cultural online resources, usage remains relatively low overall, although younger audiences are considerably more digitally engaged

Excepting cultural events, half or more young Australians are accessing these resources online

Online resources used in a typical 12-month period



	Gen Z	Gen Y (Millennials)	Gen X	Baby Boomers
Online bookshop	56%	63%	48%	34%
Online library catalogue	50%	45%	33%	22%
Online reference library resource	55%	40%	29%	18%
Digital classrooms	57%	38%	20%	5%
Online arts or cultural event	37%	30%	17%	10%
Online arts or cultural exhibition	36%	28%	17%	9%

 Usage of each online resource is slightly higher in metro areas, with the exception of **online library catalogues** and **cultural exhibitions**, where they saw significantly higher use

# Focus groups confirm potential interest in the National Library of Australia's online services, but clearly these services lack a profile in the crowded online environment

## Qualitative research feedback:

- In new audience focus groups participants confirmed the lack of profile of the National Library of Australia's online services even when searching specific interest areas where the library is likely to hold relevant resources.
- Trove and links to the National Library of Australia Catalogue were not coming up in searches (SEO), and when resources are presented via a portal (e.g. Google Scholar) they may not be identified as from the National Library of Australia's collection.
- Young people will be demanding of the technology and want a good online experience to make the National Library of Australia relevant and worth visiting. If it's not easy to access, it won't be used.

I agree that in order to obtain the information you want, you have to go through too many loopholes in order to get there. I've heard that the National Library has a big database of all of Australia's newspapers. I was just trying to find if I can see any of those online. Which even just trying to find that information or trying to find any collections. You're trying to click through hyperlinks in the text within information you're reading rather than the simple, you know, banners or, or search bars and things like that. *New audience Focus Group.*

I was a little bit surprised actually, especially around the data. The experiments I've had moments of searching just Google for a particular event. It always sends me to say the SMH website with that article, but then you have to pay there's a paywall, but if they had all of the newspapers, why wouldn't they send me to the National Library, it's free and it'd be great. It's kind of interesting, maybe they just haven't paid for the search stud, but I mean, I'm not going to think, Oh, the National Library has that. It's just not top of mind. *New audience Focus Group.*

I've used Trove for academic studies. It's a shame but in reality I am not going to put that much academic rigor into something that I am learning for my own interests. *New audience Focus Group.*

***An effective SEO strategy is required to ensure resources stand out, alongside links leading to accessible pathways once they are followed***



## Even when audience groups are searching with an academic focus, the National Library of Australia does not appear to have the presence that may be expected

I use Jstor a lot. Love Jstor. That's all I can think of really. University staff and students have free access. That's where I get most of my sources.  
*New audience Focus Group.*

I think for me, because I also major in like Chinese studies and a bit of the arts. So it's when I have an assignment I use online resources, especially electronic resources to find sources I can cite from. I was going to comment this earlier, but the National Library of Australia has no presence in my mind. Like even as I use the Sydney Uni database, like it literally has no presence in my mind. Like what comes to mind is, I don't know, ProQuest and other sources, but not the National Library of Australia. And just hearing that name to me, it sounds like a place with a vast collection of works and books and resources for research. So for me, it's like, I've done research, but I haven't really seen it. Maybe I've come across it, but it hasn't been engrained in my head.  
*New audience Focus Group.*

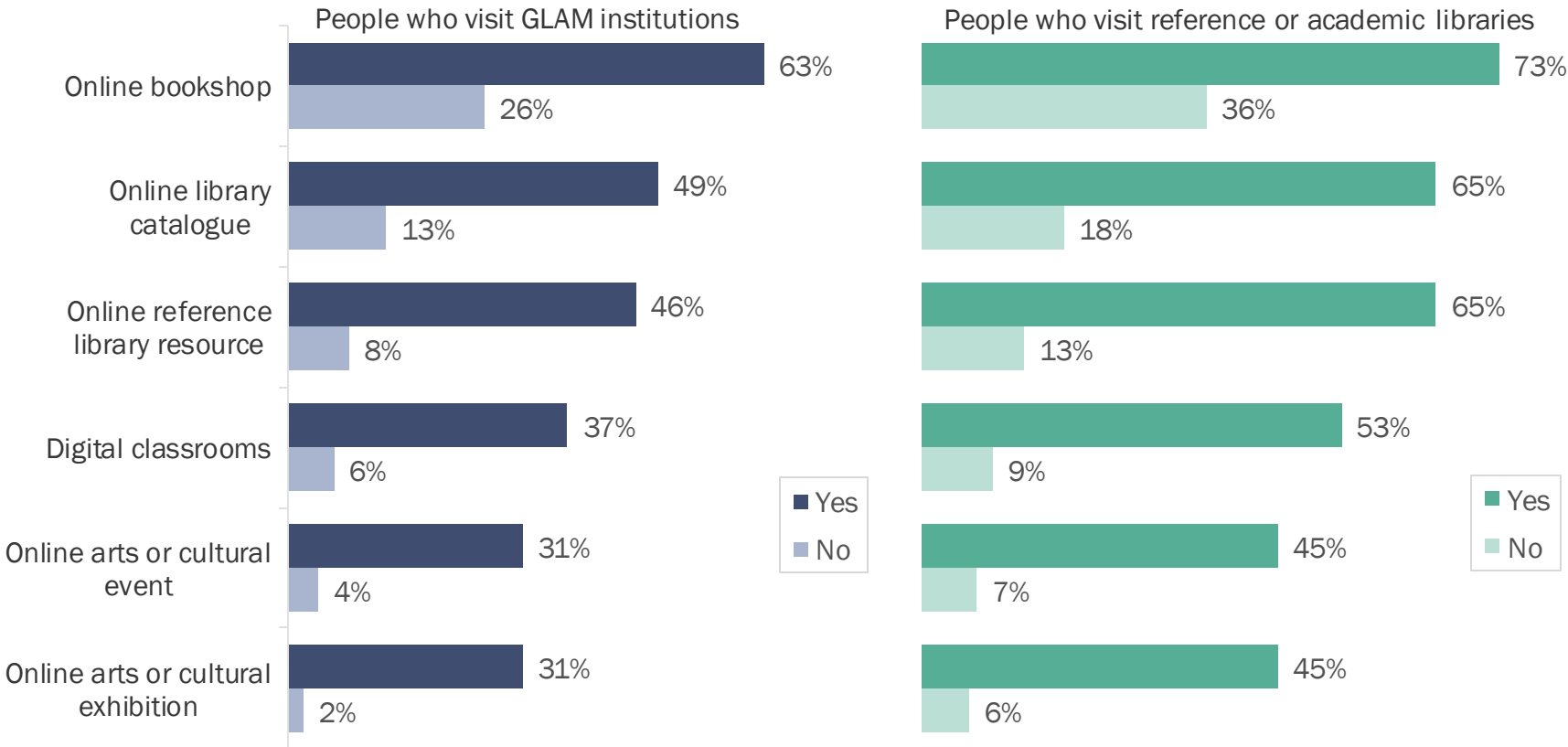
When I was doing my studies I would go through Google Scholar or the Sydney Uni library and unless an article or a digital resource flagged that it was coming from the National Library, I wouldn't know where it was hosted. How would I possibly know where the original is kept.  
*New audience Focus Group.*

***Any relevant academic search online should bring up references offered by the National Library of Australia, ideally on page one***

# Amongst those who visit reference or academic libraries and those into GLAM institutions usage of general online resources is much higher

## Key audiences for the National Library of Australia show higher usage

Online resources used in a typical 12-month period

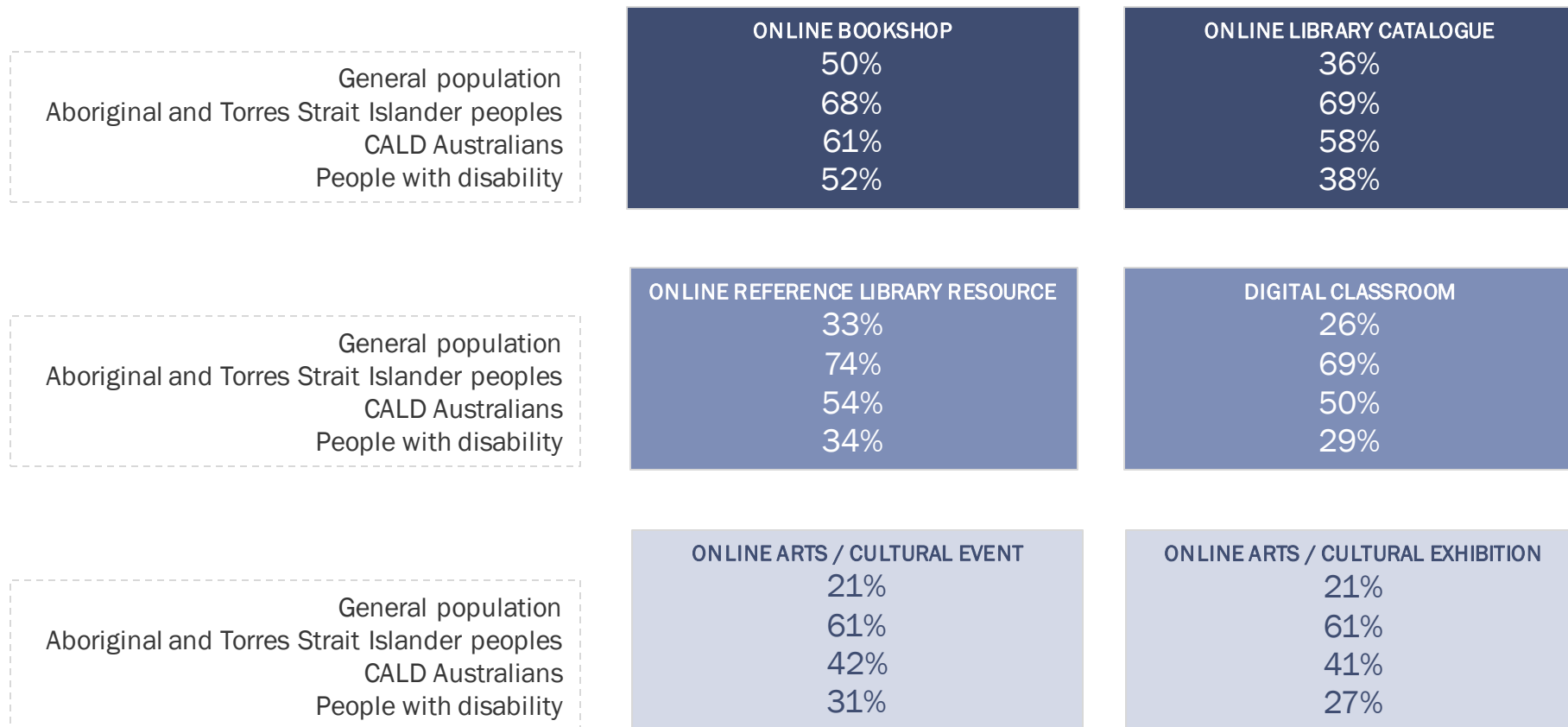


Q9. Again thinking about your regular life, that is, before the current COVID-19 pandemic. In a typical 12-month period, how often have you accessed the following type of online resource? Base: General Population Survey aged 18+ (n=3071) / Visit GLAM institutions (n=2064) / Don't visit GLAM institutions (n=1007) / Visit reference or academic libraries (n=1168) / Don't visit reference or academic libraries (n=1903)

## Diversity groups are also more active users of all general online resources

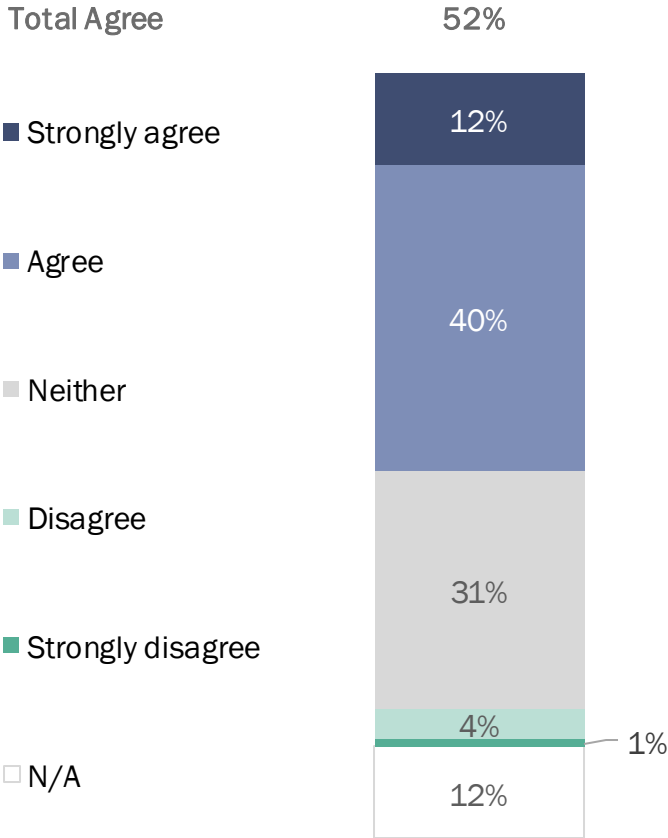
Aboriginal and Torres Strait Islander peoples have higher usage levels of all the presented resources and are three times more likely to access online arts / cultural events and exhibitions

*Online resources used in a typical 12-month period*




# Half of Australians 18+ believe GLAM institutions are accessible online, however 31% are unsure, suggesting many have not looked or tried to engage online with GLAM activities

GLAM institutions are accessible to me to visit online



Two thirds of Reference & Academic Library Visitors agree (67%)



Amongst GLAM visitors, agreement increases to 62%

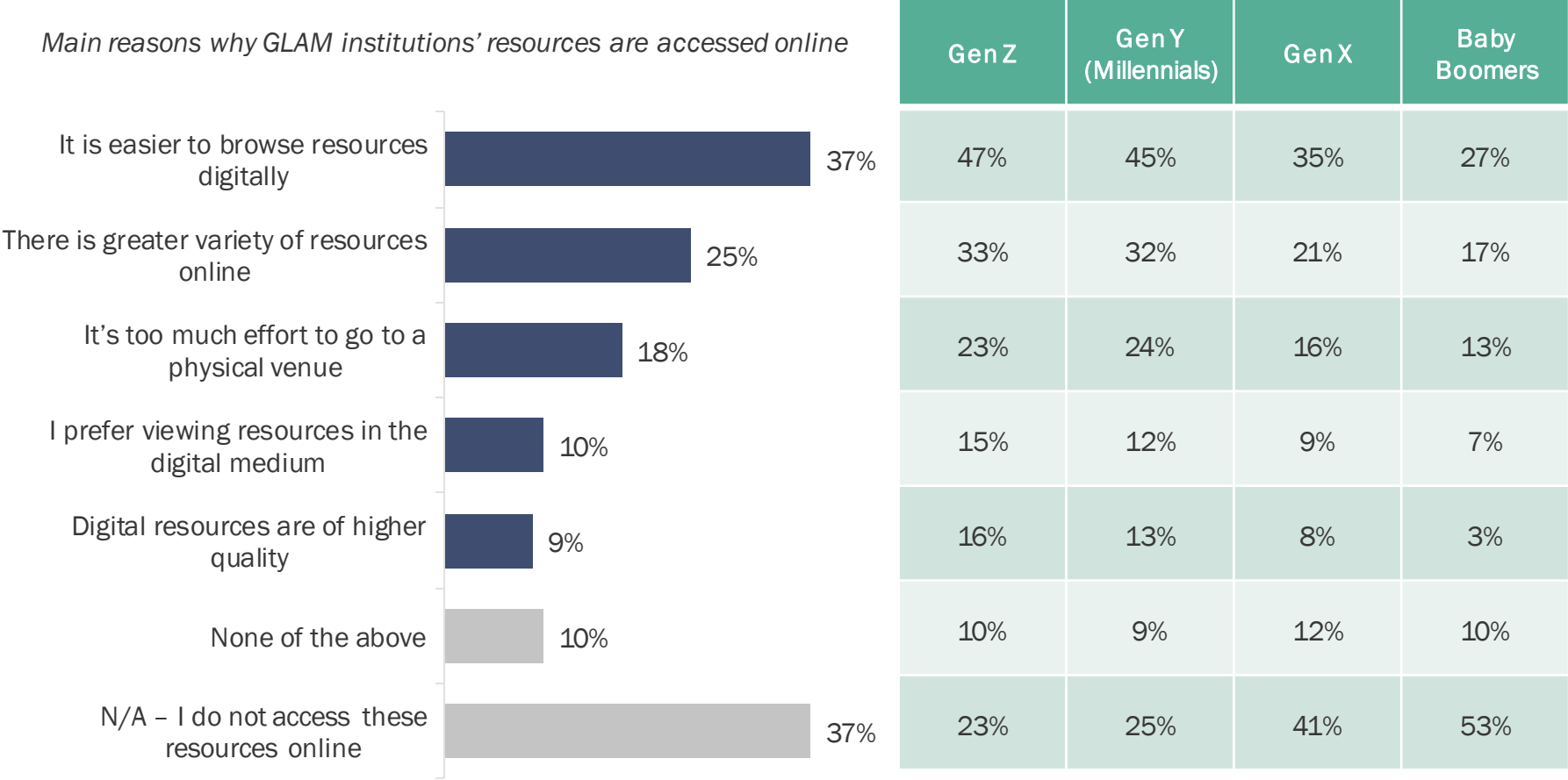


Agreement is consistent in capital cities compared to the rest of Australia



# Ease of browsing and the greater variety of resources could be messages / triggers to encourage people to engage online

Accessing GLAM resources online and seeing value in doing so decreases sharply with age

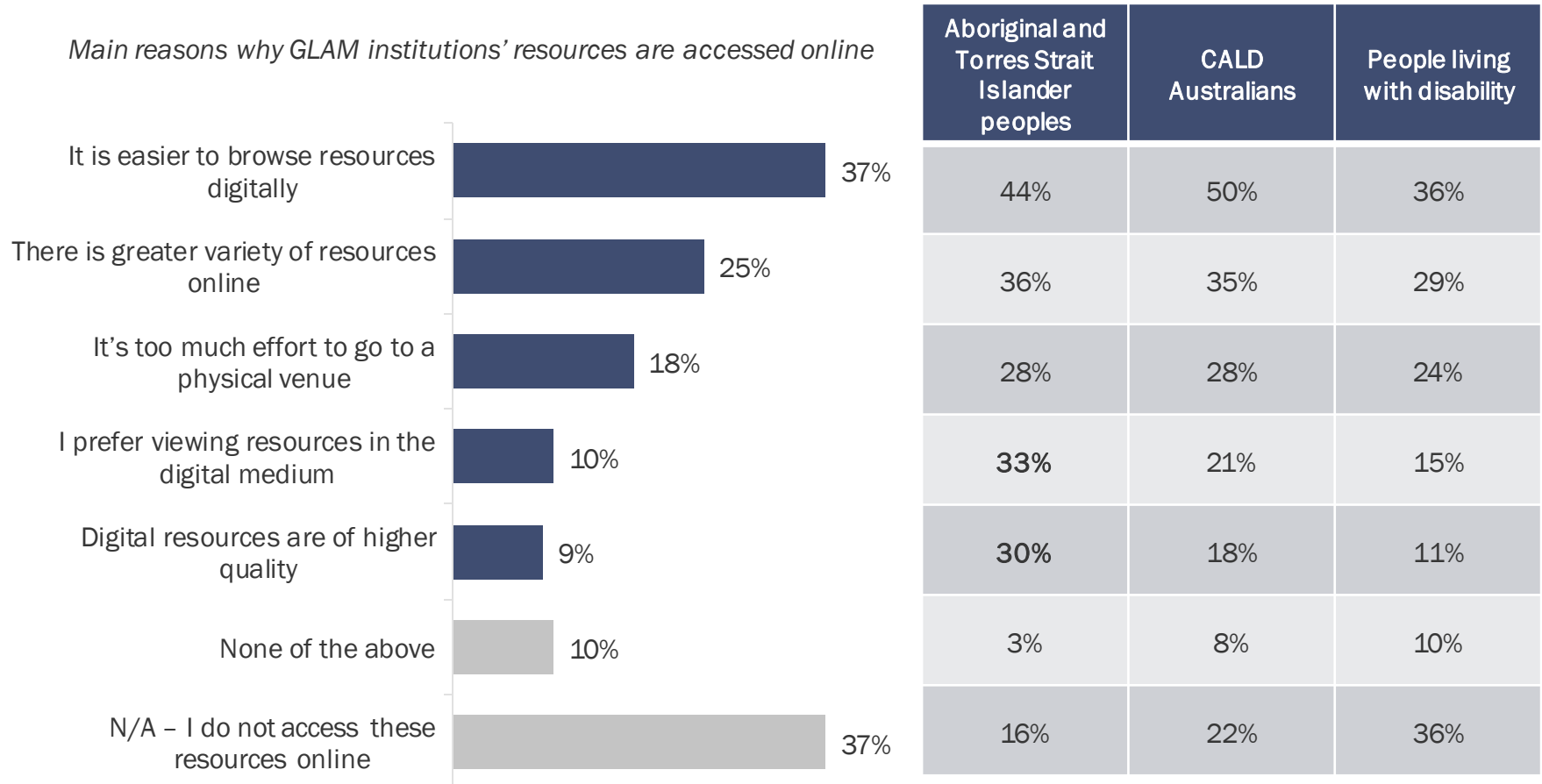


**Making it easy for mainstream audiences to navigate online resources is a key requirement to increasing digital engagement with sector**

# Accessing GLAM resources online is more likely across the diversity groups particularly Aboriginal and Torres Strait Islander peoples and CALD Australians

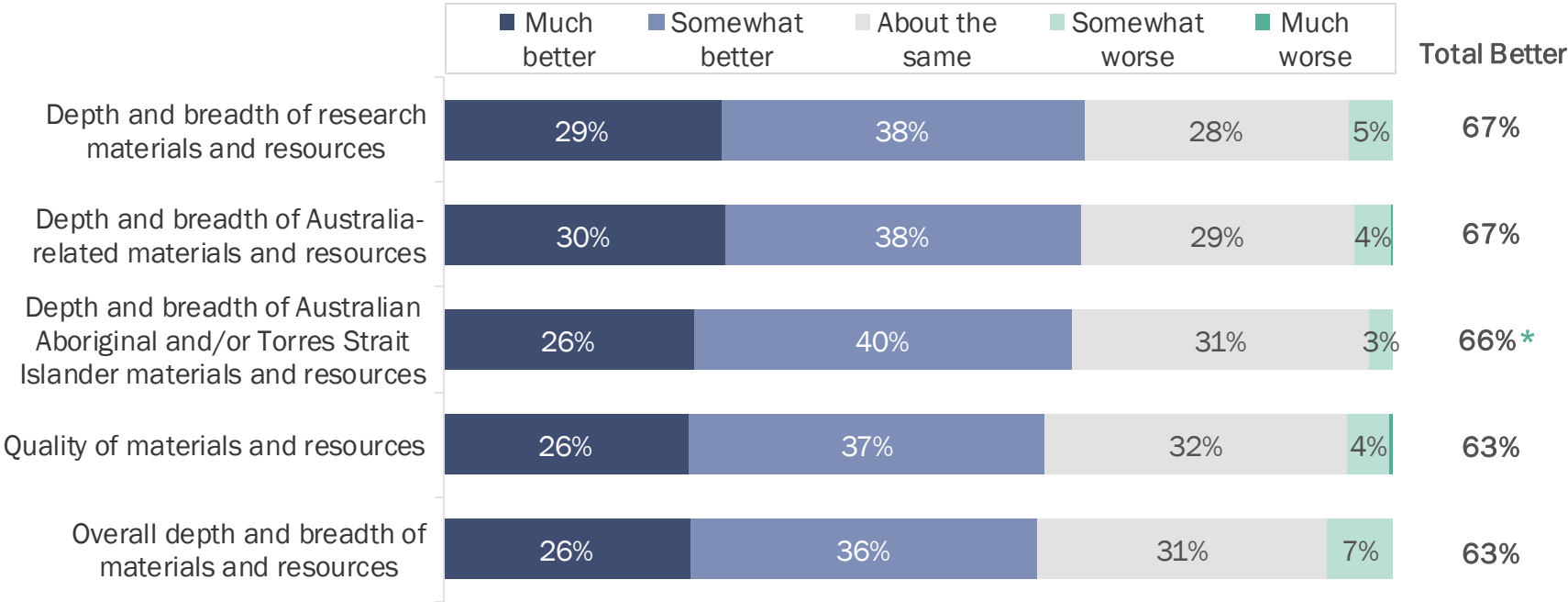
When comparing to the national average, there are no significant reasons why the people living with disability use GLAM institutions' online resources


Main reasons why GLAM institutions' resources are accessed online



# Despite low levels of awareness and usage, views of the National Library of Australia’s catalogue are positive, with library users mostly rating it better than competitors

Rating the National Library of Australia catalogue against competitors – NLA visitors



 Reference & Academic Library Visitors rate the National Library of Australia as better on all aspects, and ‘better’ on:

- Quality of materials and resources (67%)
- Depth and breadth of research materials and resources (72%)

\*Aboriginal and Torres Strait Islander visitors are more likely to rate the National Library of Australia as better than competitors (85%) on this aspect than the general population (66%)

## 3.6

# The GLAM sector

Why and how often people interact with the GLAM sector may provide some learnings for the National Library of Australia, either when looking to better connect with Australians or to improve reach and appeal of service. The GLAM sector is more likely to be visited for leisure, entertainment and social reasons than the library and may deliver to these better overall.



Whilst the National Library of Australia competes in the GLAM sector, museums and galleries better meet entertainment drivers by being easier places to engage with



#### Qualitative research feedback:

- Participants in new audience focus groups often saw museums and galleries as more accessible places for leisure and entertainment than a reference library and the National Library of Australia in particular.
- Key to this is the perception that museums and galleries showcase information and collections in a way that is easily digestible and designed to be consumed ‘as is’. This makes them places to go without a specific goal or task in mind.
- By contrast the National Library of Australia requires work by the visitor to select and identify materials and resources. This can be seen as too hard, too unappealing or too difficult to know where to start. Being a written medium rather than the more visual artform associated with museums and galleries can also be a barrier for those less sure / confident about how to engage with the library.
- Exhibitions offered by the library can mirror the more easily accessible content of a gallery or a museum but there is a lack of awareness of these offers generally, and even when noted there can be perceptions that these will not be as easily enjoyed if offered by a reference library.

***The perception that the library’s resources and activities are hard to access for everyday Australians may be restricting growth opportunities***

## Australians need convincing that the National Library of Australia has easily accessible content and activities, similar to other GLAM institutions

I kind of agree with your thinking on that. Like, because to me, I think unless the library had an exhibition, to me, it's nothing like a museum or gallery because I think that even if I don't know what I want to look at, if I go to a museum or gallery I can just wander around and I can go, oh, that looks cool or whatever. But I feel like, I guess not knowing enough about the library, I feel like if I came here, like what do I do? What do I look at? I have to think. And I guess, yeah. So from that perspective, I don't think it's really similar at all, unless there was some type of exhibition. *New audience Focus Group.*

I didn't realise that the library did exhibitions or anything like that until I checked out the website [as part of this research]. So that's completely new to me, a bit mind blown to be honest. I just thought the National Library was just a holding room of books and that's just a perception like your local library. That's, that's what I thought. And that's probably why I've never been. *New audience Focus Group.*

I think that's what makes Enlighten [in Canberra] so special being on the library. It's almost an invitation to come into the library because it is such a foreboding building. And if you think about the National Art Gallery it's, you know, it's got art on the outside it looks like a fun place kind of thing. And the National Museum is like, big and colourful. *New audience Focus Group.*

Unless you really want to get in depth into a topic, a type of topic that you could find out about here [at the National Library] I wouldn't come here. I just wonder how people find out about it. How would your average person know exactly what this library has? *New audience Focus Group.*

I'm probably more likely to go to a National Film and Sound Archive event because I have more of an idea of what to expect and that helps me to be comfortable in some way. *New audience Focus Group.*

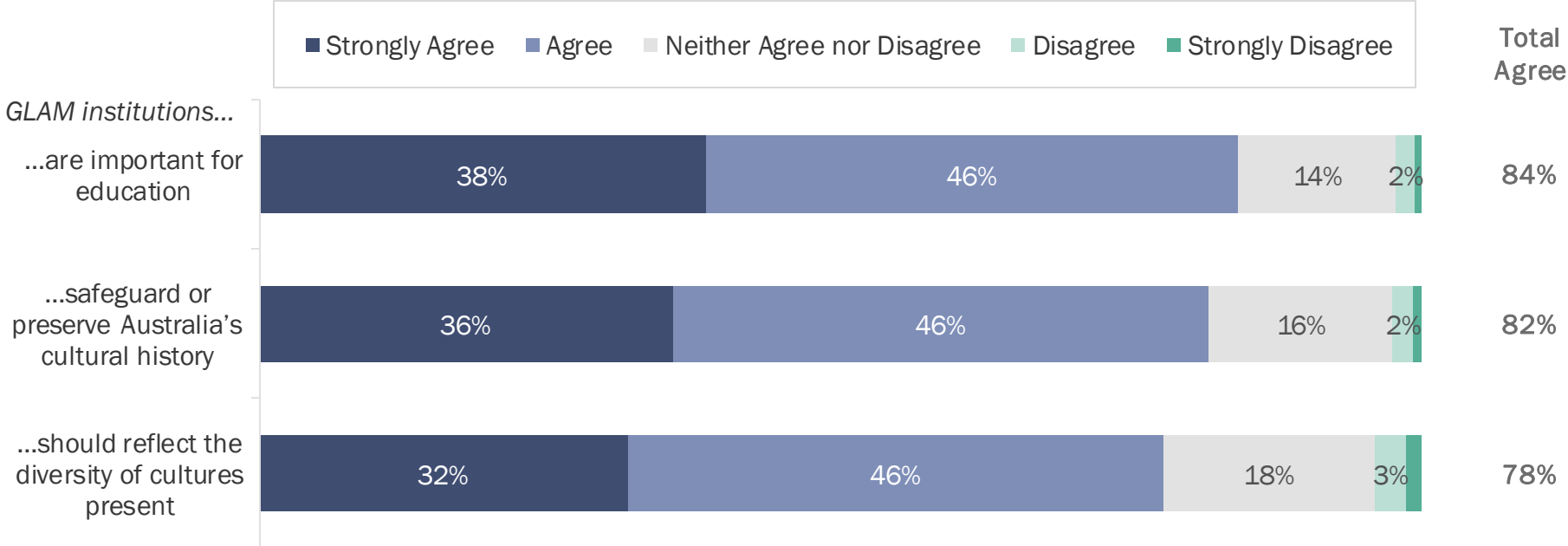
Whereas people go to the museum as a bit more of as an attraction where the library is more, let's go there and get some study done. Let's do some work not going there for fun. *New audience Focus Group.*

***Raising awareness of GLAM sector activities is important as is the need to address perceptions that may be limiting engagement***

# GLAM institutions are highly valued in Australia

Not only do most Australians think GLAM institutions are important for education, but they also agree that GLAM works to preserve Australia’s cultural history

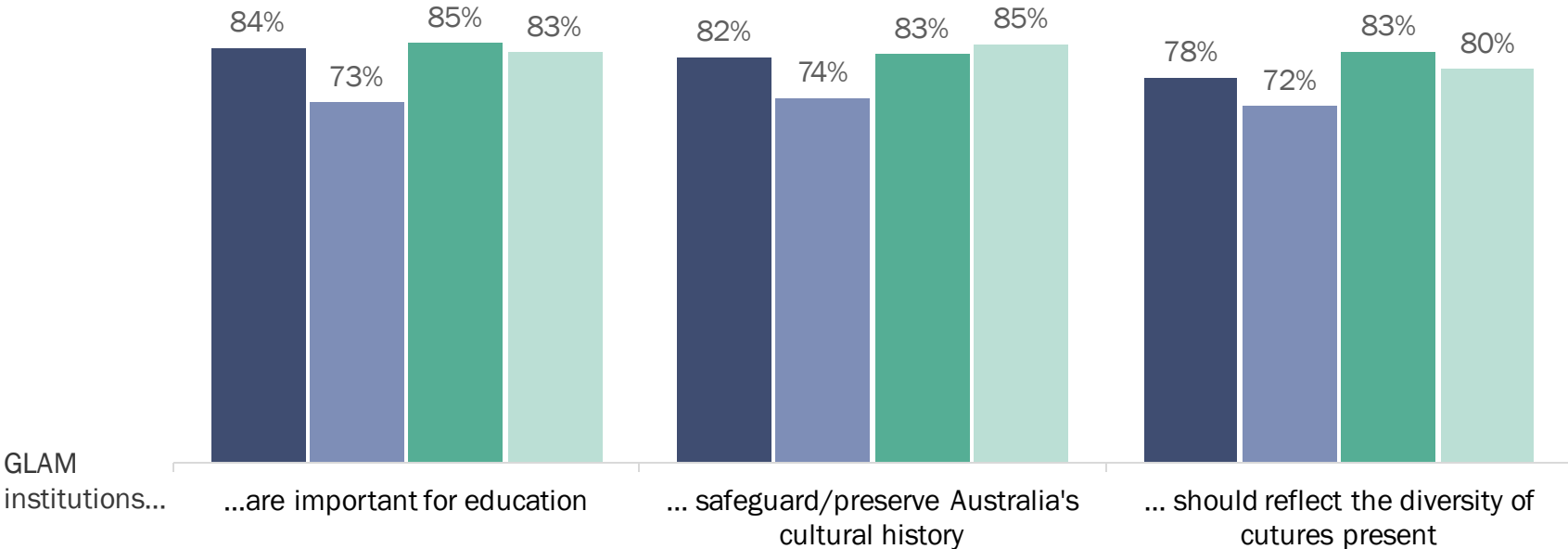
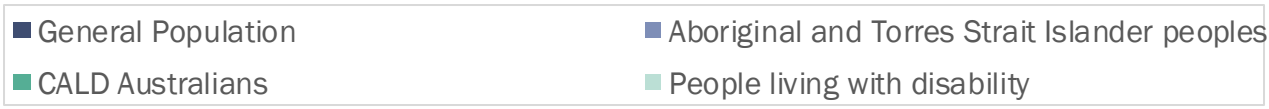
Attitudinal statements regarding GLAM institutions



Note: An engagement index has been developed based on this question and scores used to segment audiences and guide strategic communication (See Segmentation)

# While First Nations peoples highly value GLAM institutions, agreement with each attitude statement is lower compared to the general population and other groups

Attitudinal statements regarding GLAM institutions – total agreement

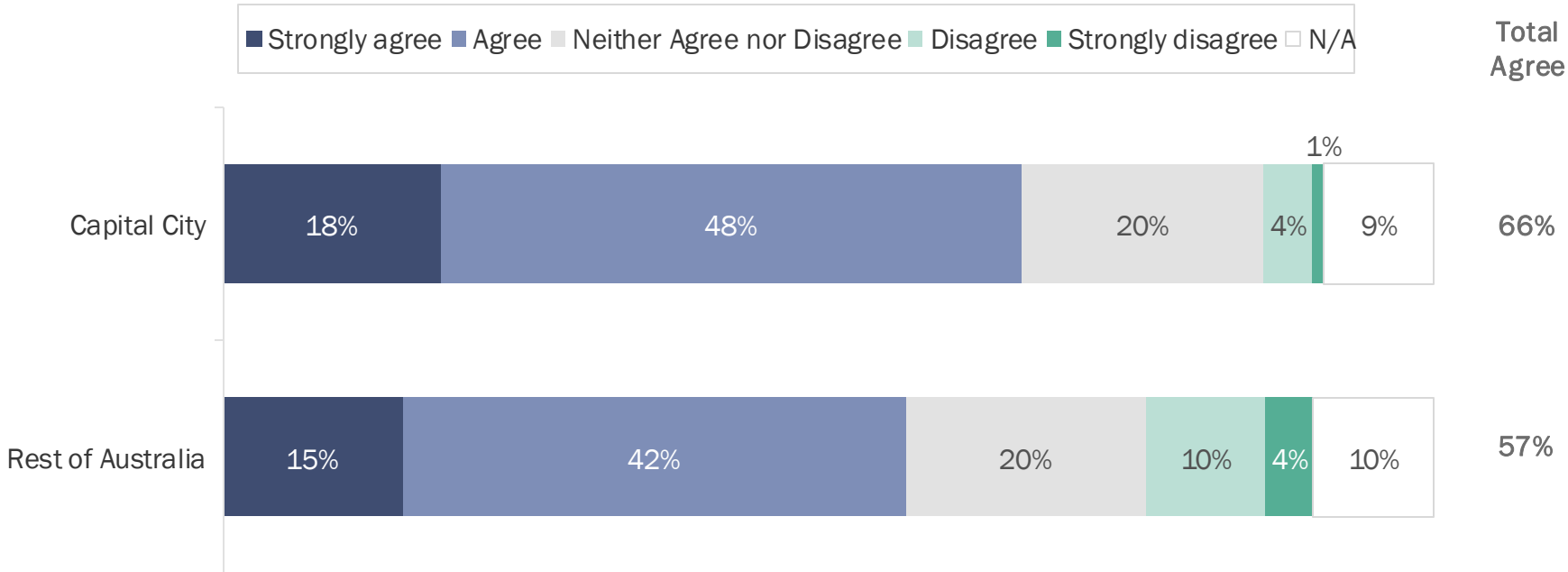


Note: For further exploration of attitudes to GLAM institutions refer to the Diversity Groups section

**By location, attitudes to GLAM institutions are consistent for six of the seven statements presented, however attitudes to accessibility differs for those outside of capital cities**

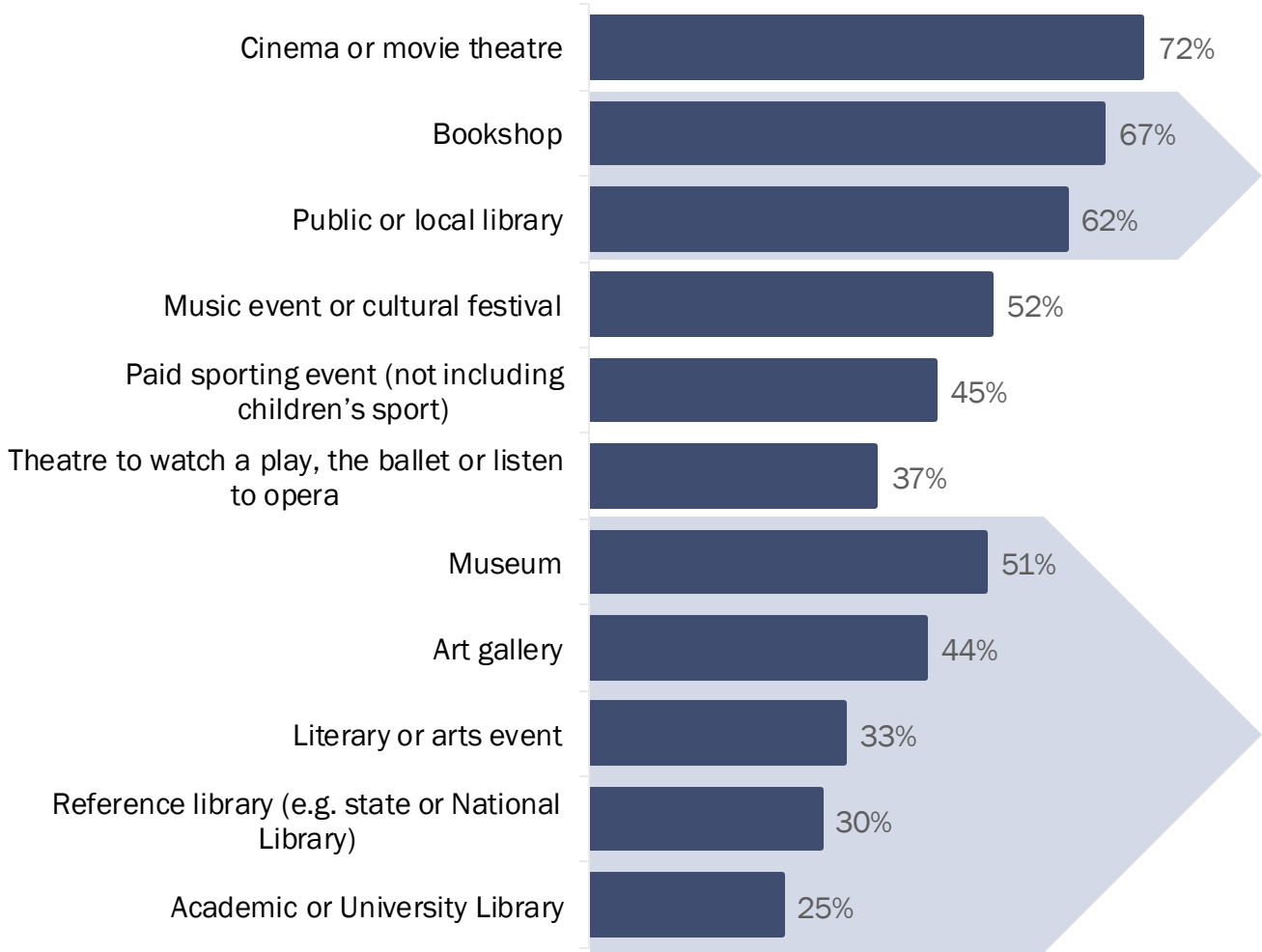
**Australians living in non-metro areas are three times more likely to disagree that GLAM institutions are accessible for them to visit in person**

*GLAM institutions are accessible to me to visit in person*




# When looking at the GLAM sector and associated cultural activities, cinemas and movie theatres are the most frequently visited venues of the activities listed

Engagement with activities at least 1-2 times a year



Australians' frequent interaction with books suggests increasing awareness and availability of the NLA Bookshop could provide an easy, familiar and popular pathway into the National Library of Australia



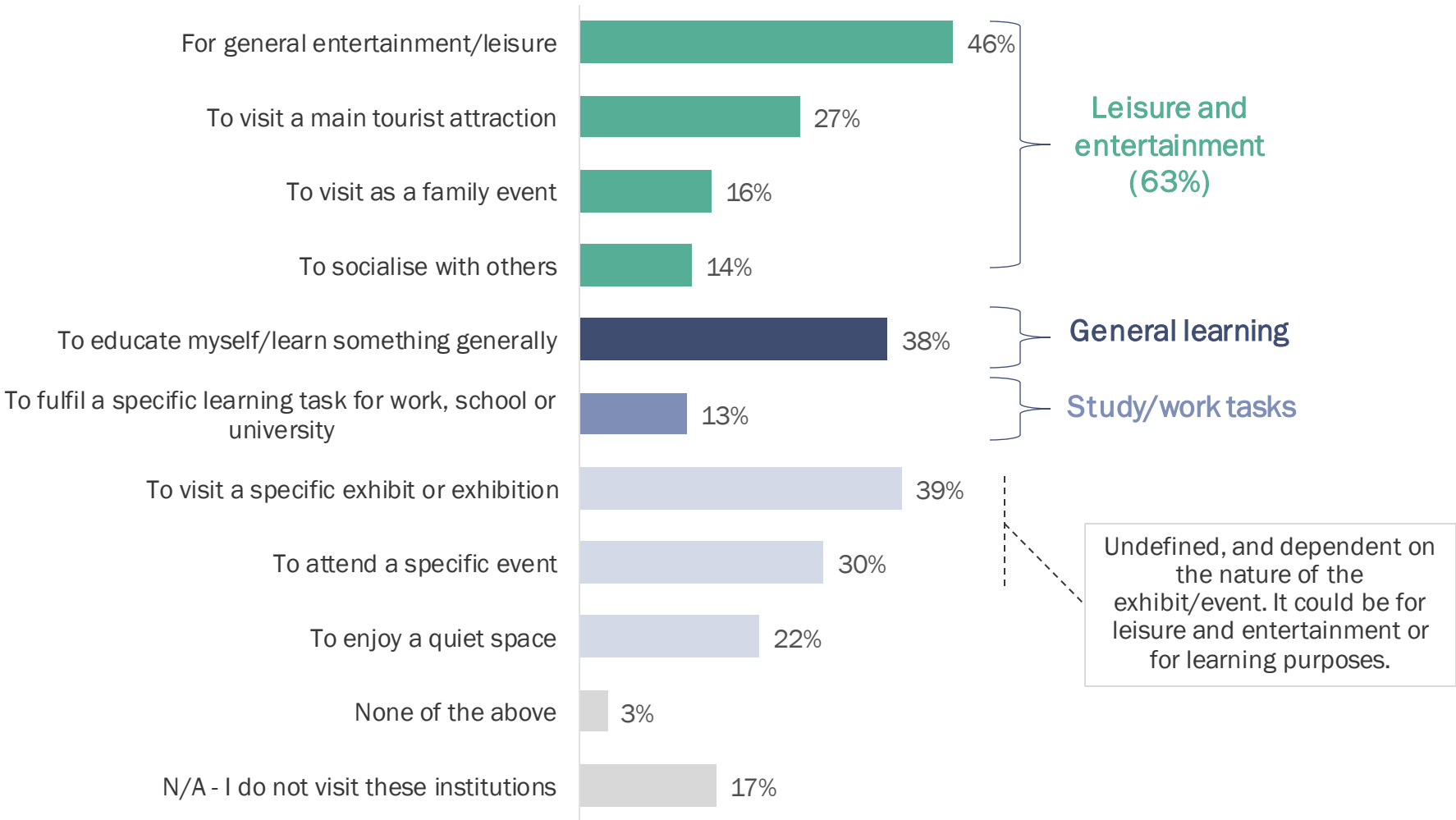
GLAM sector visits are popular with 64% of Australians 18+ visiting GLAM events / institutions at least once a year



# As found in relation to why Australians visited the National Library of Australia, the key reasons to visit GLAM institutions are general leisure and learning related

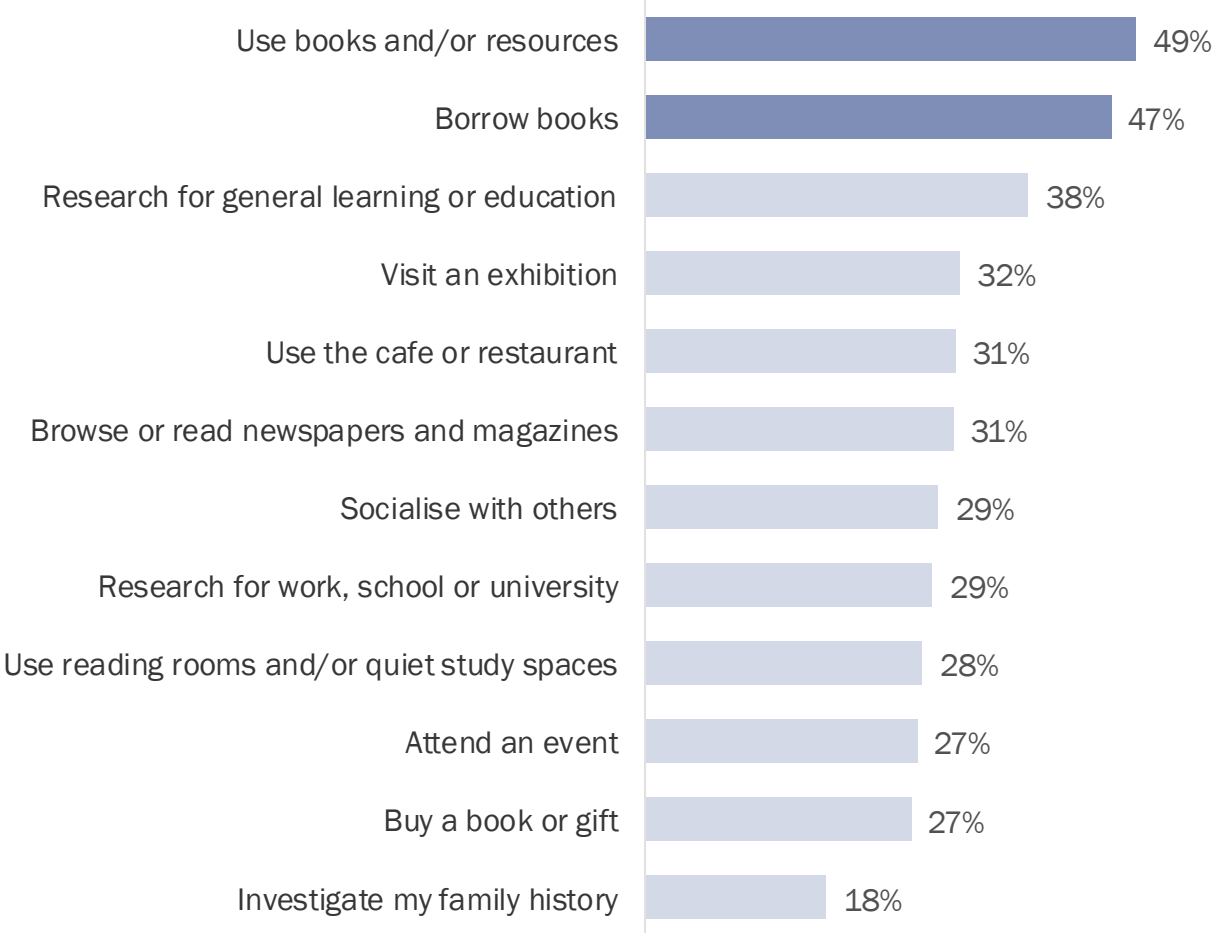
Specific study rates lower for GLAM institutions (13%) versus the National Library of Australia (19%)

Reasons to visit GLAM venues



# Australians heavily associate libraries with book borrowing – the National Library of Australia’s lack thereof may add to this public disconnect

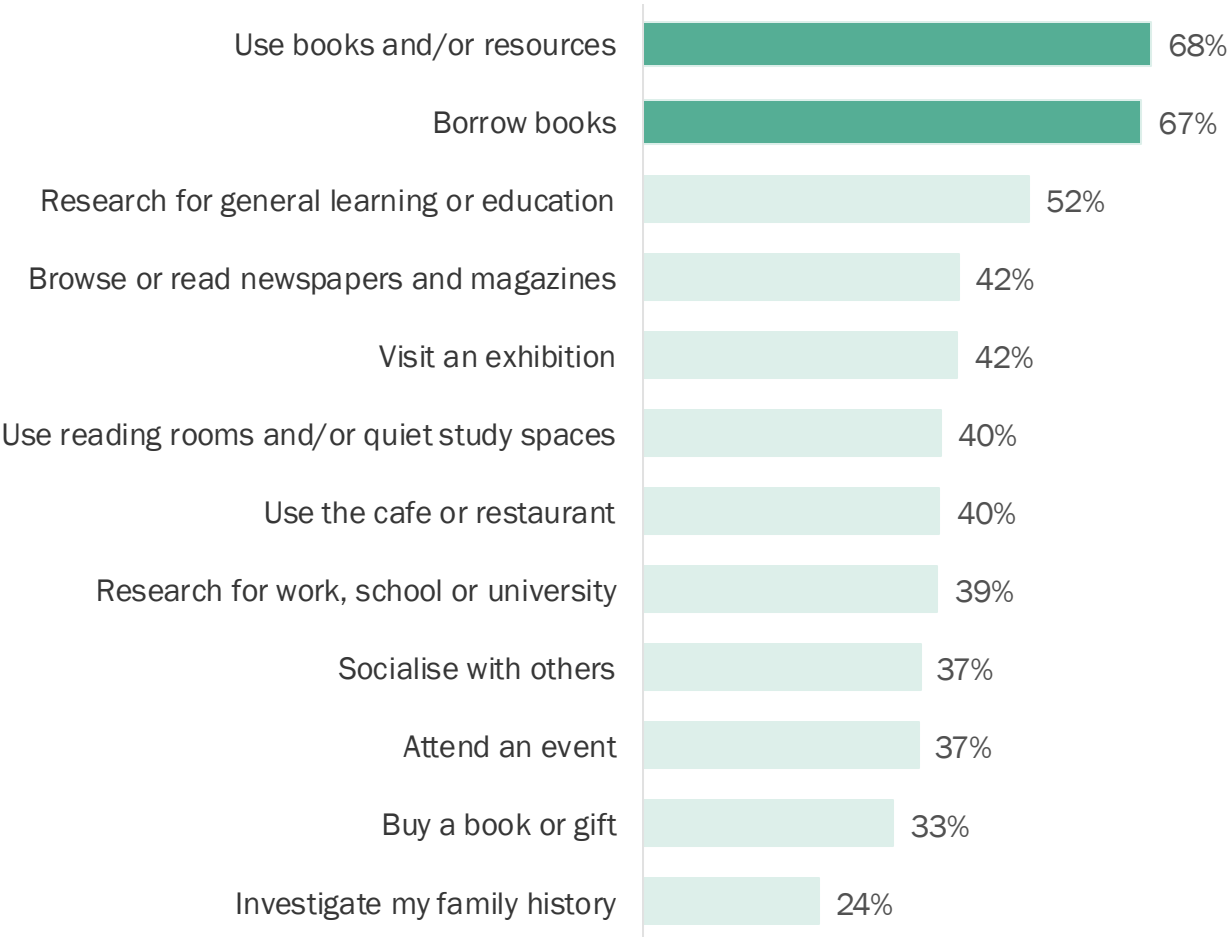
Reasons to visit libraries in general (either occasionally or frequently)





# The same core drivers are found amongst those who use local or public libraries

Reasons to visit Libraries in general (either occasionally or frequently) – public/local library users



## 3.7

# Communications

The general population were asked about communication preferences and channels for the National Library of Australia in the qualitative focus groups. Feedback suggests that the current lack of profile means new audiences are unlikely to seek out services. The National Library of Australia will need to impact on inertia and consider the three key drivers and how triggering engagement around each of these can be maximised using channel preferences

# Not surprisingly, preferences are dominated by social media, however some see real value in investing in Google search results (SEO) and this may be a missed opportunity

I follow a bunch of art galleries and museums on **Instagram**. It's so nice, because art is a visual medium it's probably well suited to a medium like Instagram. So an art gallery can post a beautiful painting and it's like wow. Not sure it compels me to go but I can look and see. *New audience Focus Group.*

When you're new to Canberra. Like I was three years ago, I was looking online for things to do and things to see. And I think like the library and like the other galleries around here, they all advertise through like memes that I read, like maybe like **HerCanberra** it's like an **online blog**. And they post like what's fun on the weekend. I really like reading that and it's cool. Cause otherwise, I don't know if I would've known about the National Library. *New audience Focus Group.*

I think for the events and exhibitions they need to put them on **Facebook** say something specific that would appeal to you or you get it and you go ooh, I'd like to see that. And then while you're there [website link or website link to exhibit] checking it out, you're finding, you're seeing other stuff, all the collections. *New audience Focus Group.*

Potentially if there was an exhibition, like that took my fancy, but otherwise like I wouldn't go to that particular site [National Library] to see what was on. It would only be like, I guess if an ad or something popped up that sparks my interest. Yes on social media. I wouldn't go out and look for it myself if there was an ad, I might click on it. *New audience Focus Group.*

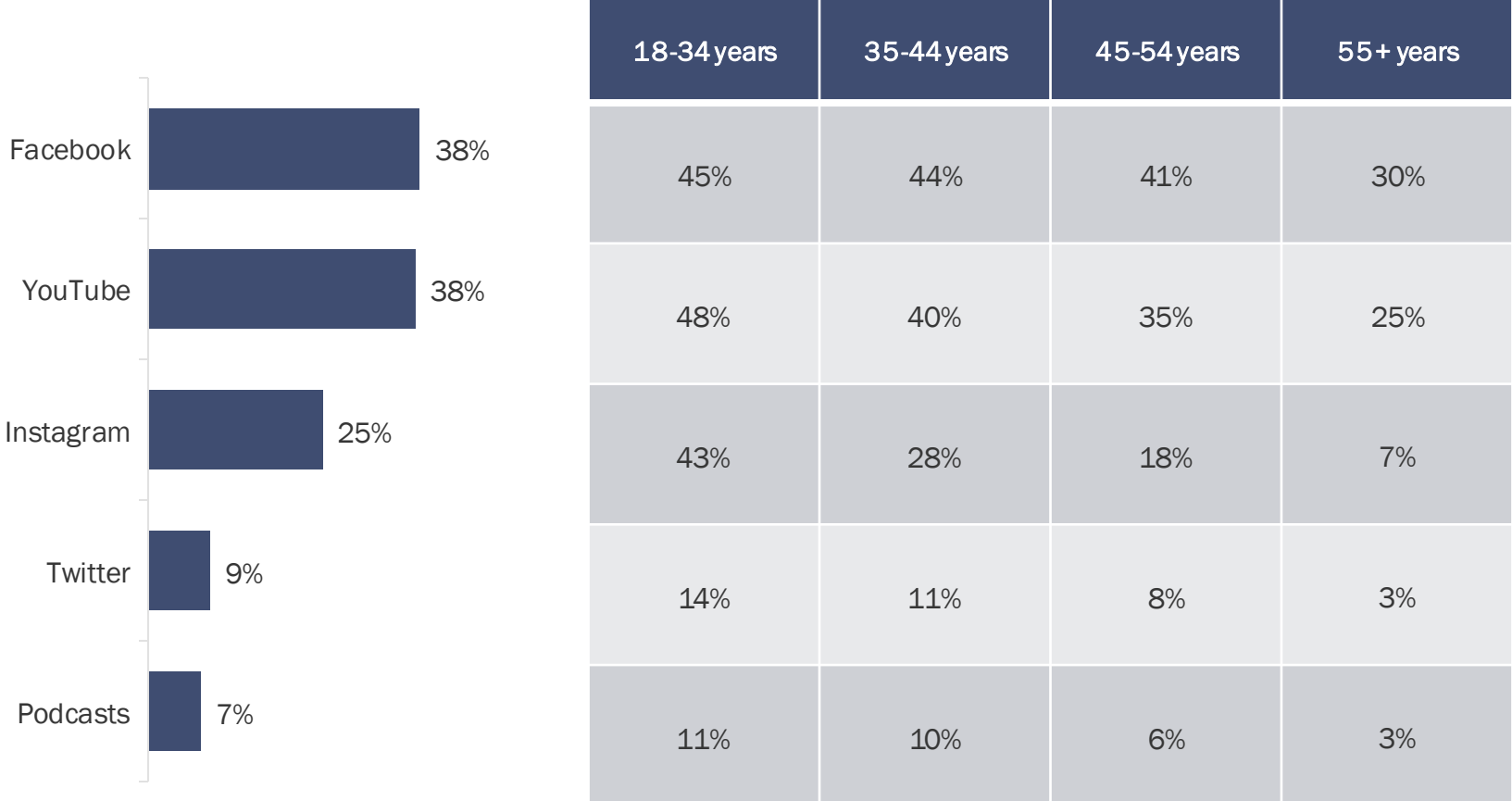
I would prefer they sort of be more visible on social media. Especially nowadays a lot more people, especially the younger ones would be looking into **Facebook, Instagram**. And a lot more and also on **Google search** would be a good way as well of marketing. So of course, if you have to search for anything and you'll see it as an advertisement, somewhere in **Google**, it's just right into your face and you could just click it and you can just see a lot of things about the National Library. *New audience Focus Group.*

Advertising wise they need to get into the **Google search** results so that they can actually get people like me. I don't use social media. I want to see if there's something interesting. I don't really go on Facebook or anything I search. *New audience Focus Group.*

**Responding to every Australian's Google information search with at least one credible, easy to access, free resource is an easy win**

# From the Australia Council for the Arts' research, Facebook is the most popular platform used by Australians

- 64% of Australians aged 15+ use a digital platform to engage with creativity, culture and art (this includes literature, music, dance, theatre and visual arts and craft).
- 81% of 18-34 year olds use a digital platform, the most common being Youtube followed by Facebook.
- Facebook remains the most popular social media form for those older than 35 years.





## Current audience



## Important note on the Current Audience

Section 4 represents the perspectives of the current and highly engaged audience of the National Library of Australia. It is principally important to understand that their views do not reflect that of the average Australian – including the average National Library of Australia visitor.

A comparative glance at the behavioural and motivational differences between the current audience and visitors from general population clearly illustrates this divide. The current audience respondent is someone who has used the National Library of Australia's services for more than 10 years, often physically visits an average of 9 times a year, and accesses Trove more than once a fortnight. They almost certainly have a library card, and a significant proportion of them are a Friend, Patron or Petherick Reader.

There is a bias in their demographics to older users with the majority being 65 years or over and more likely to be female. Their views around library services are very positive and they most often emerge as brand Promoters (based on NPS scores).

The current audience undoubtedly forms an integral part of the National Library of Australia, and maintaining their patronage is critical. However, they represent a niche and segment of the Australian population and meeting their needs, which is most often about maintaining the status quo, will continue to build repeat patronage amongst a select group.

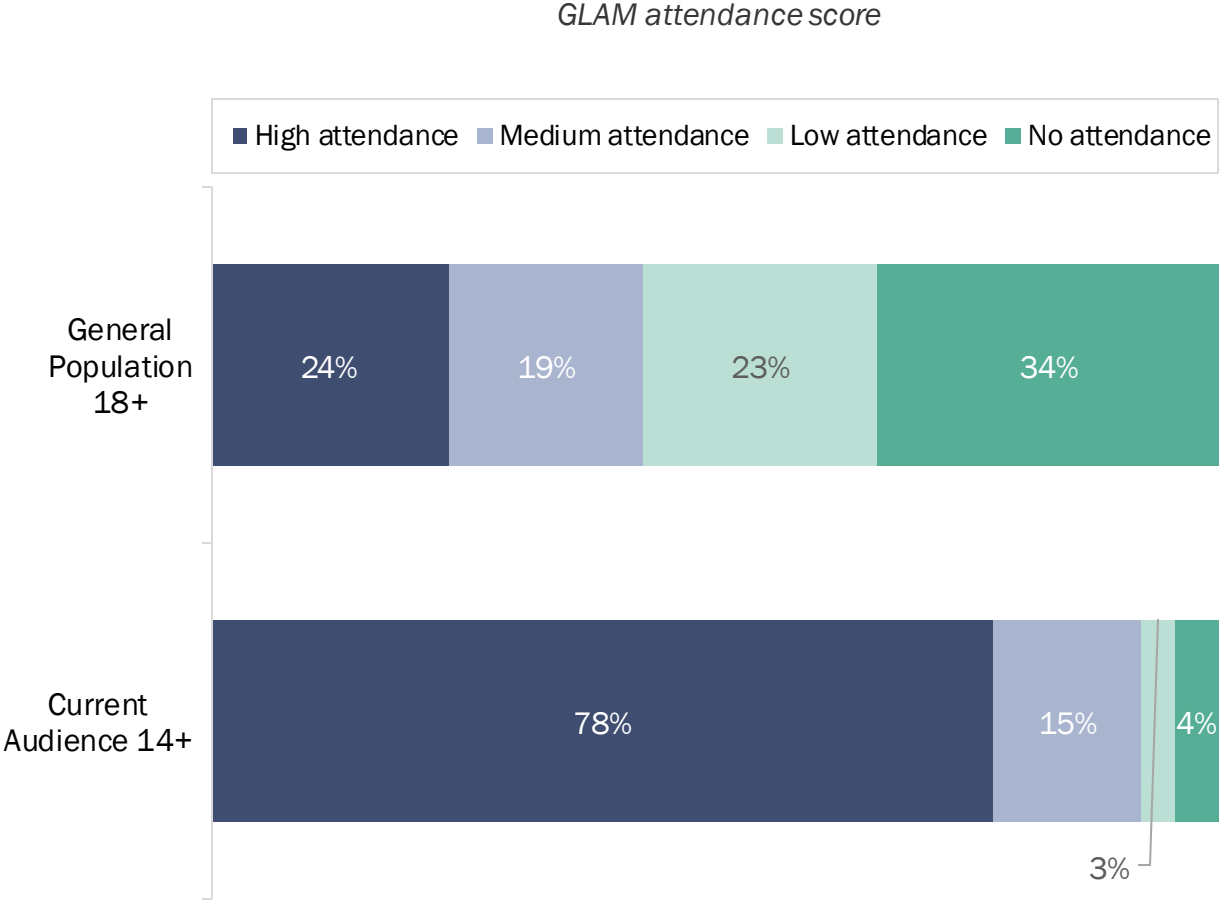
To make the most of new opportunities and grow the National Library of Australia brand, Lonergan recommends that insights collected from the general population are used as a focus, particularly in relation to strategic recommendations moving forward.

## 4.1

# The GLAM sector

The highly engaged current audience are not only active members of the National Library of Australia, but are also engaging with other organisations in the GLAM sector

# The National Library of Australia's current audience are much more engaged with the GLAM sector generally and are over three times more likely to visit GLAM venues



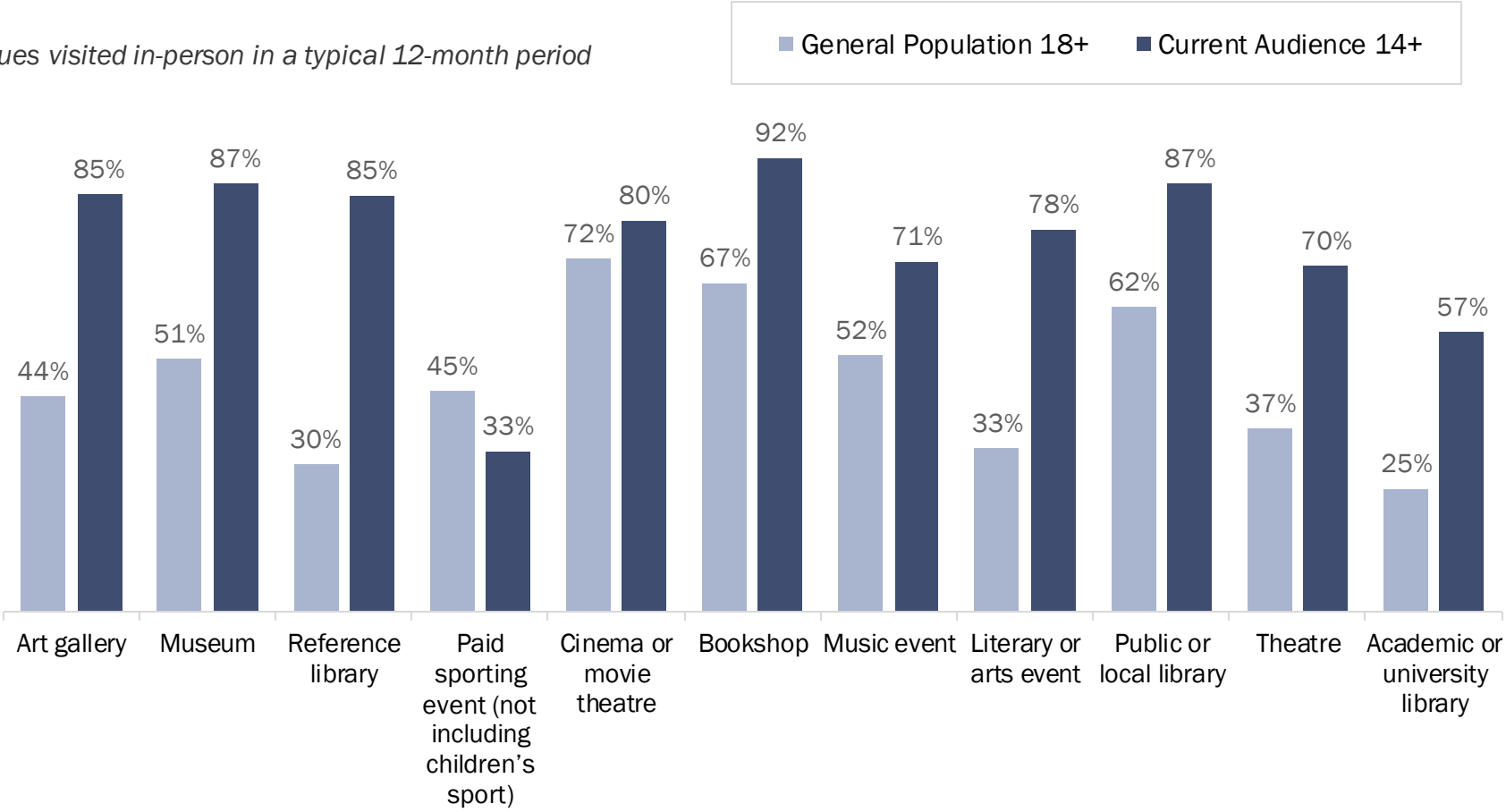
Q7. Please think about your regular life, that is, before the current COVID-19 pandemic may have impacted your day-to-day activity, while answering each question. Now thinking about a typical 12-month period, how often have you visited the following type of venue in person? Base: General Population Survey aged 18+ (n=3071) // Q22. Current Audience Respondents (n=968)



# Attendance at GLAM and other leisure-based venues is higher amongst the current audience

Apart from increased attendance to different types of libraries, they are twice as likely to visit art galleries, literary or arts events and theatres

Venues visited in-person in a typical 12-month period



Q7. Please think about your regular life, that is, before the current COVID-19 pandemic may have impacted your day-to-day activity, while answering each question. Now thinking about a typical 12-month period, how often have you visited the following type of venue in person? Base: General Population Survey aged 18+ (n=3071) // Q22. Current Audience Respondents (n=968)

## 4.2

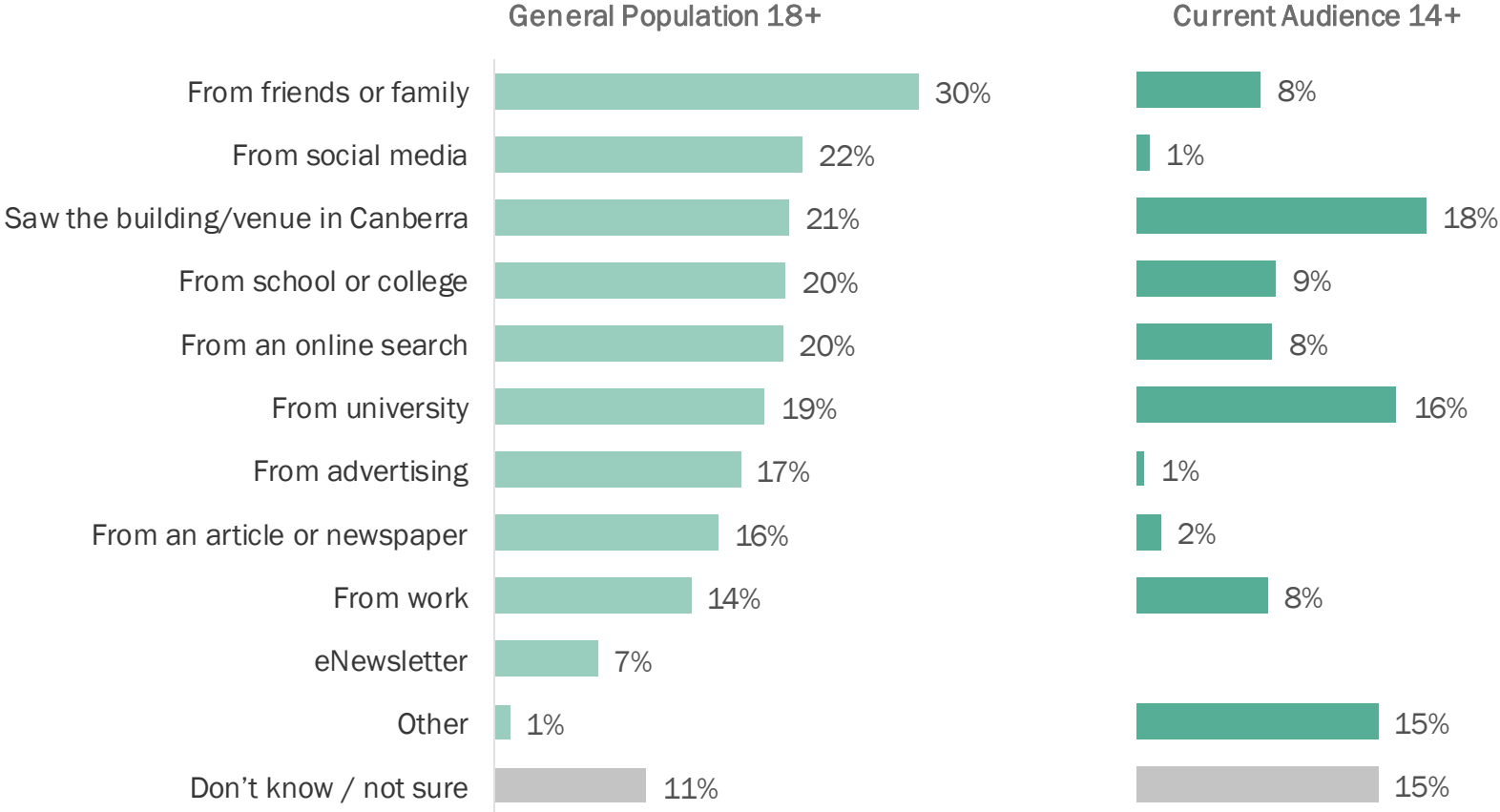
# Relationship with the National Library of Australia

The current audience are long-term supporters of the National Library of Australia. Research and collections are key drivers for both on-site visits and digital usage.

Whilst on-site visits average nine a year, online engagement is high (85%).

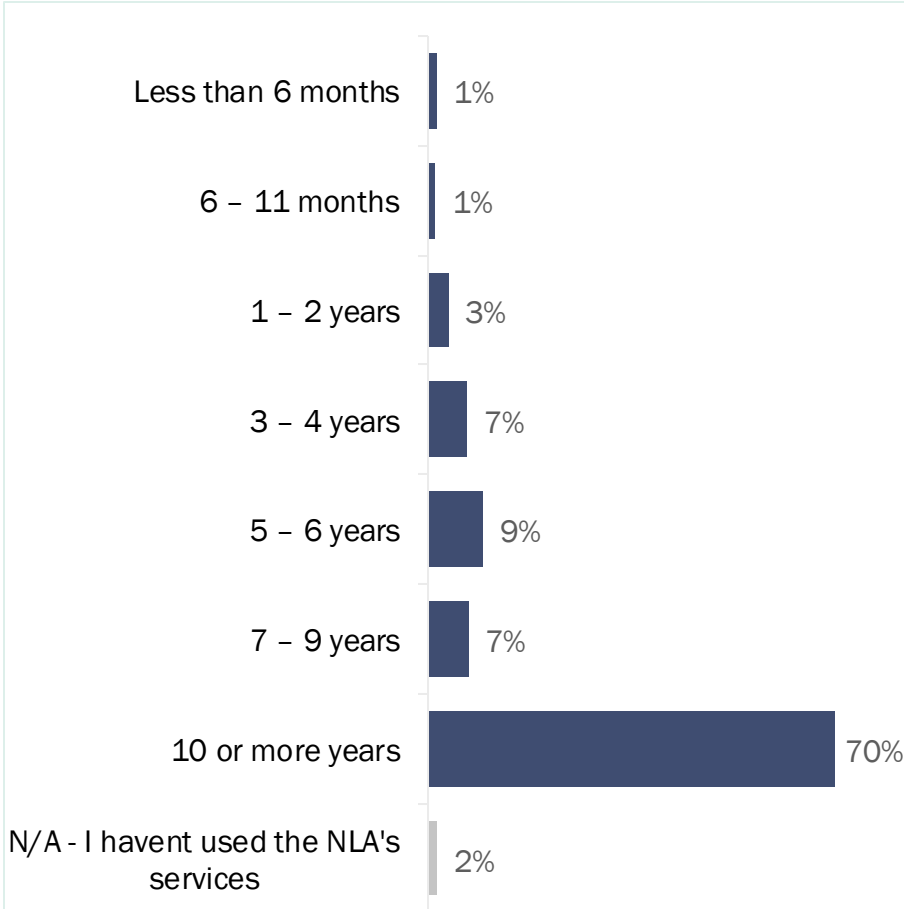
# Whilst the general population mostly hear about the National Library of Australia through word of mouth, the current audience first hear about the Library because they physically saw the building, or from university

How did you first hear about the National Library of Australia?

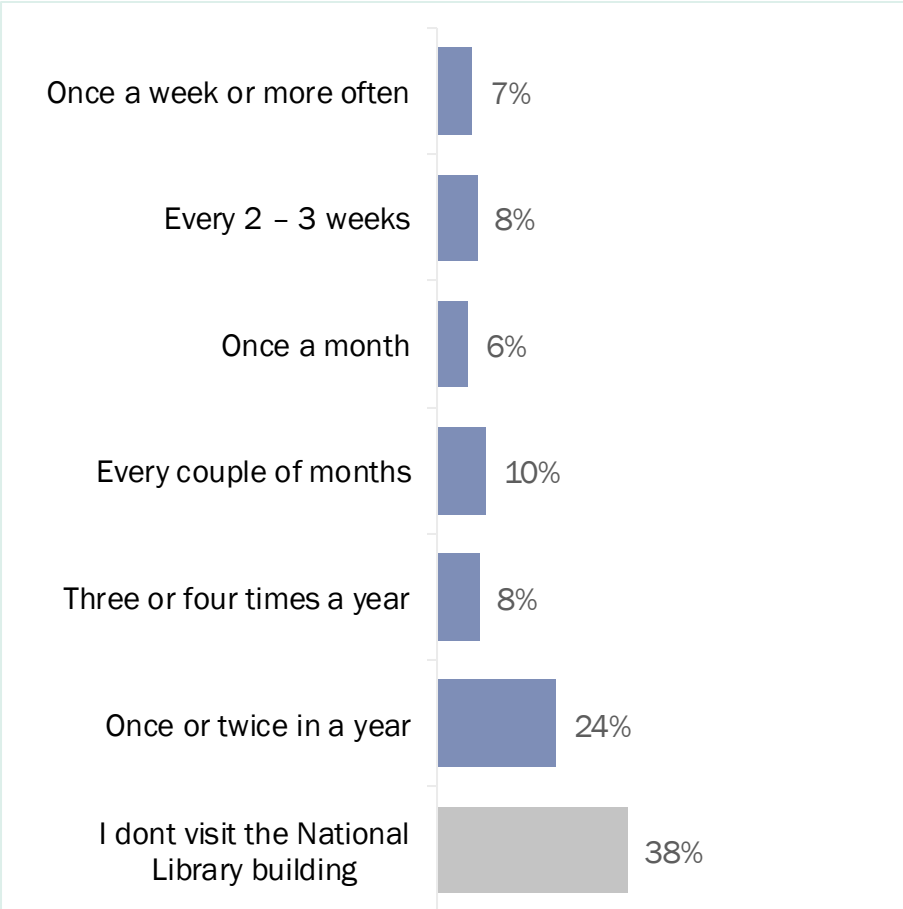


The current audience are clear supporters as most have been using the library's services for more than 10 years, and on average visit the building nine times a year

Frequency of using the National Library of Australia's services

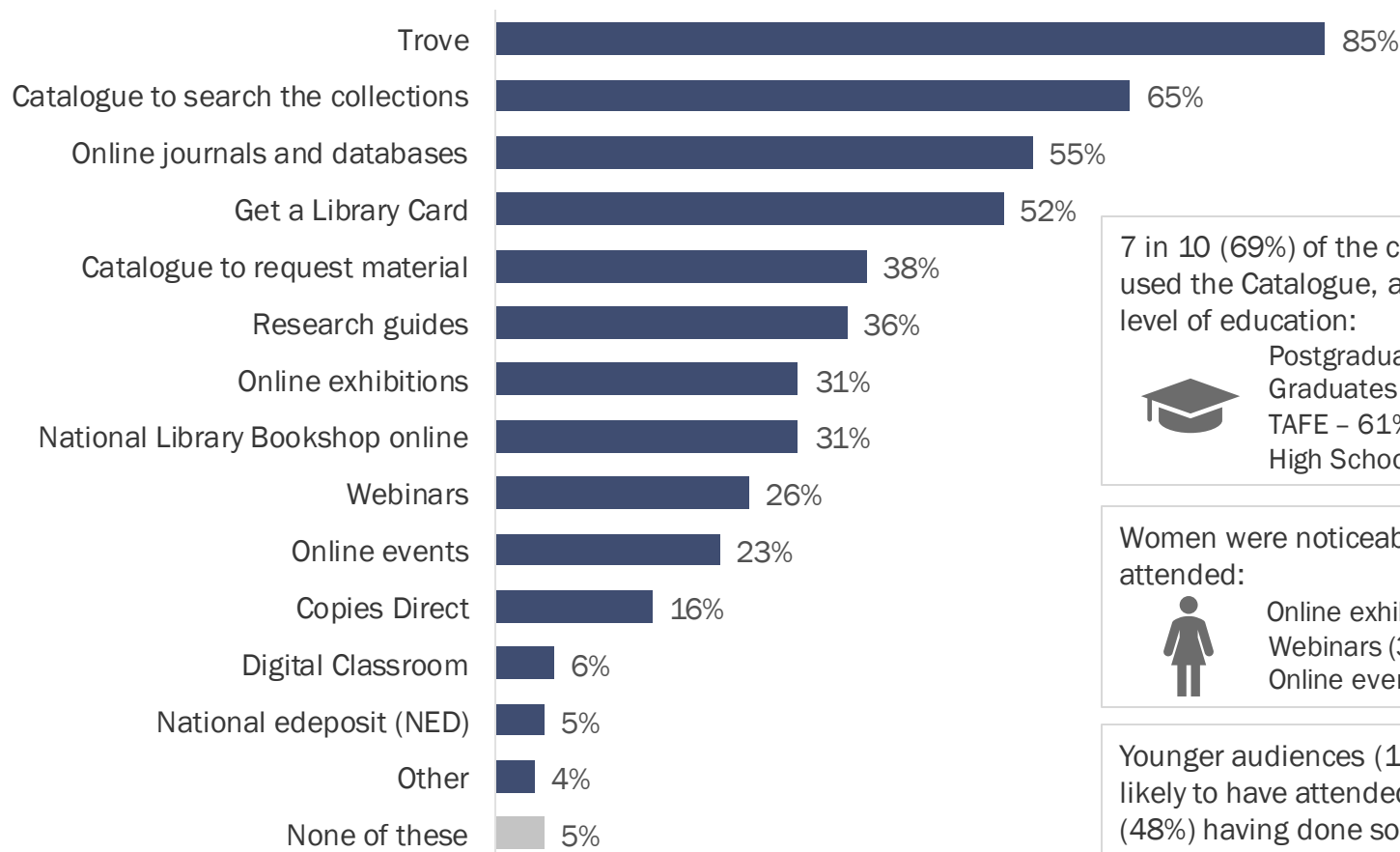


Visitation of the National Library of Australia building in 12-month period



# The National Library of Australia's current audience show significant engagement with online offerings with almost all (95%) using digital services

Use of the National Library of Australia's digital services



7 in 10 (69%) of the current audience have used the Catalogue, and usage increases with level of education:



Postgraduates – 79%  
 Graduates – 63%  
 TAFE – 61%  
 High School – 37%

Women were noticeably more likely to have attended:



Online exhibitions (36%; cf. men 24%)  
 Webinars (32%; cf. men 16%)  
 Online events (29%; cf. men 16%)

Younger audiences (18-34 yrs) were more likely to have attended online events, with half (48%) having done so.

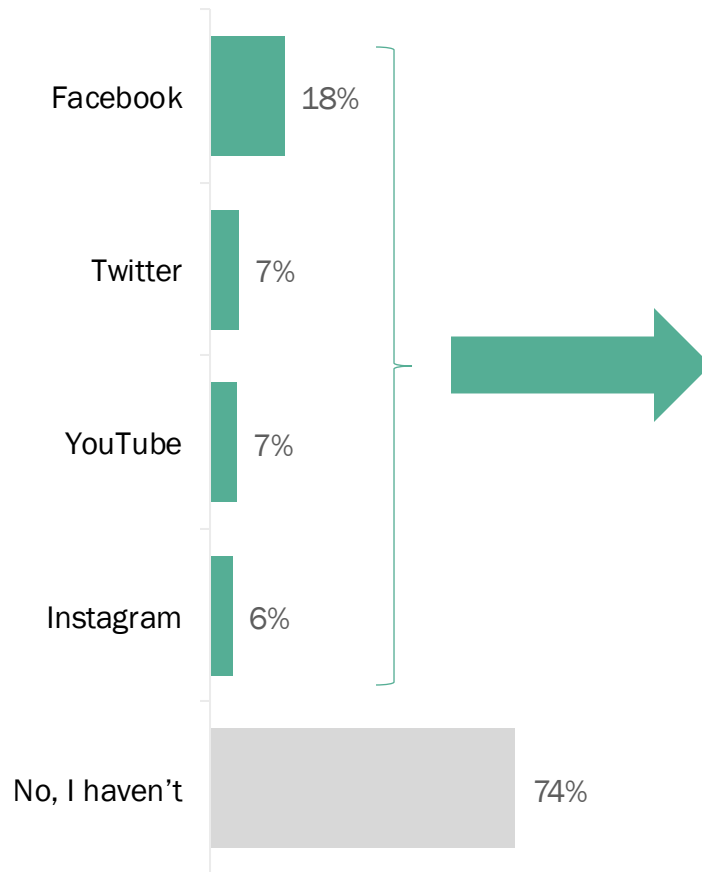


35-49 yrs – 33%  
 50-64 yrs – 25%  
 65+ yrs – 20%

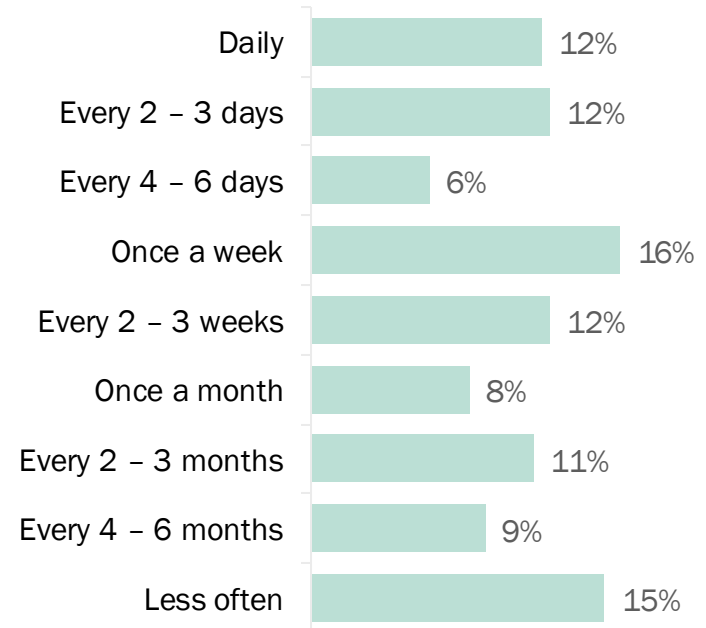
# Engagement with social media is low (26%), with Facebook the main channel and used by 1 in 5

Those who access the library's social media do this an average of 78 times per year

Use of the National Library of Australia's social media

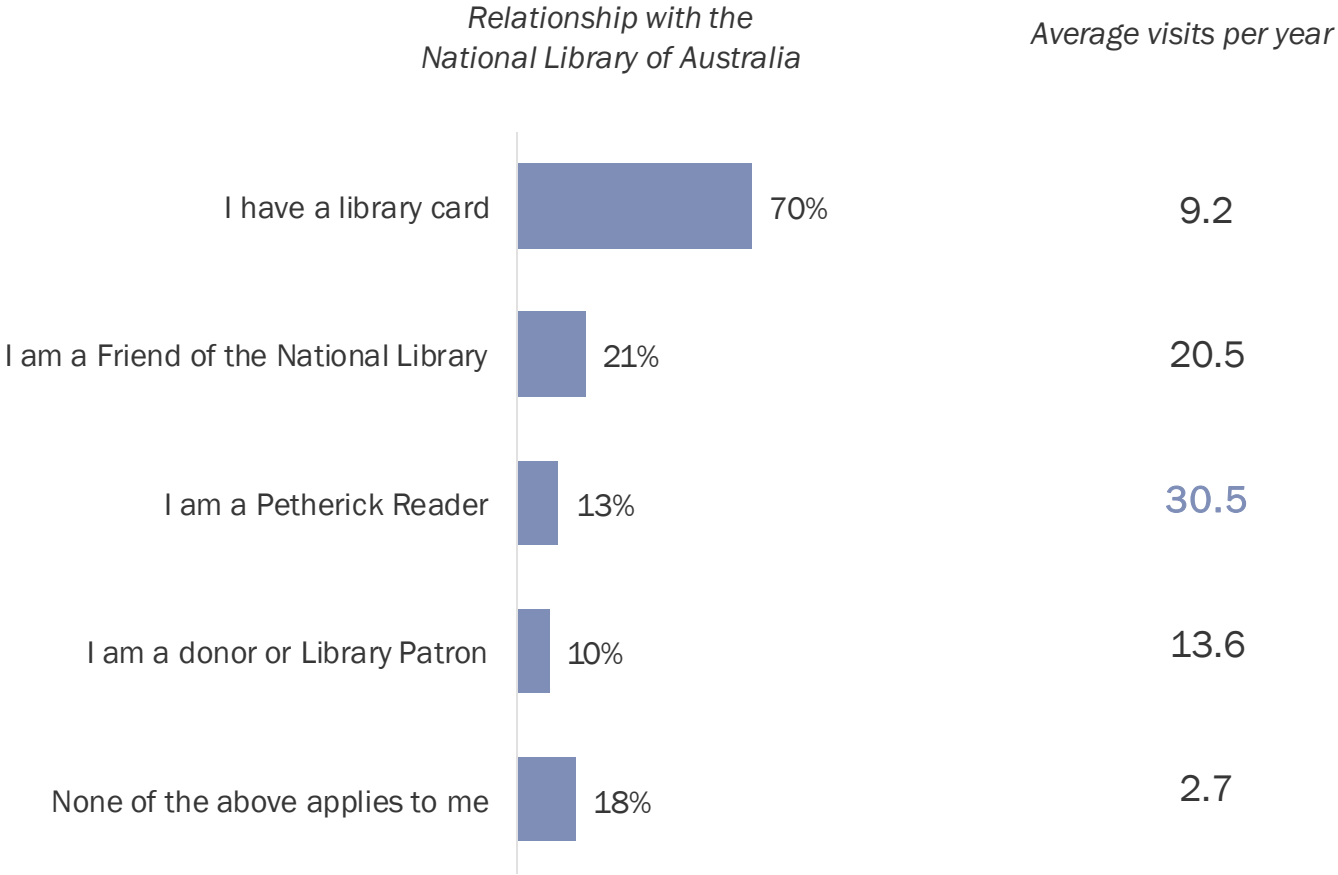


Frequency of accessing the National Library of Australia's social media



# Even though most of the current audience have a library card, they only visit the National Library of Australia building an average of nine times a year

Those using the Petherick Reading Room visit much more frequently, on average 30 times a year



# A snapshot of Library Card holders

## DEMOGRAPHICS

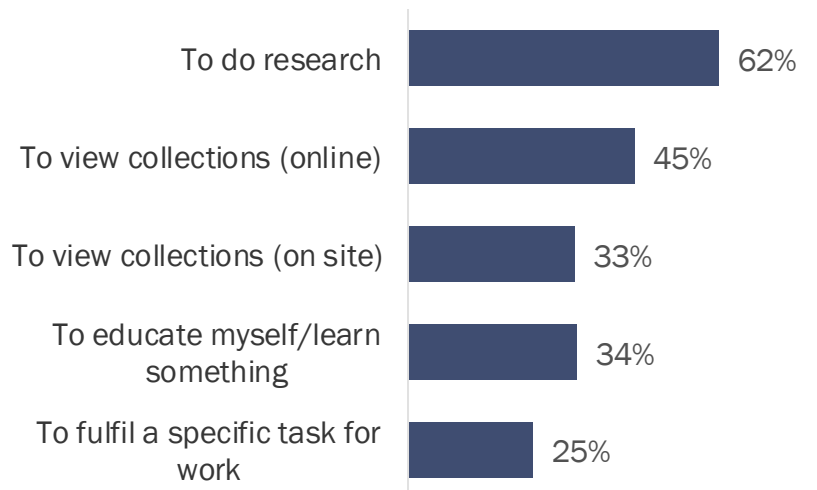
Gender	39% male / 60% female
First Nations peoples	1%
CALD Australians	10%
People living with disability	11%
Location	33% are ACT residents
Education	80% have completed university or postgraduate studies
NLA building visitation	9.2 times a year

20% of Library Card holders are also a Friend of the National Library of Australia and 11% are Petherick Readers

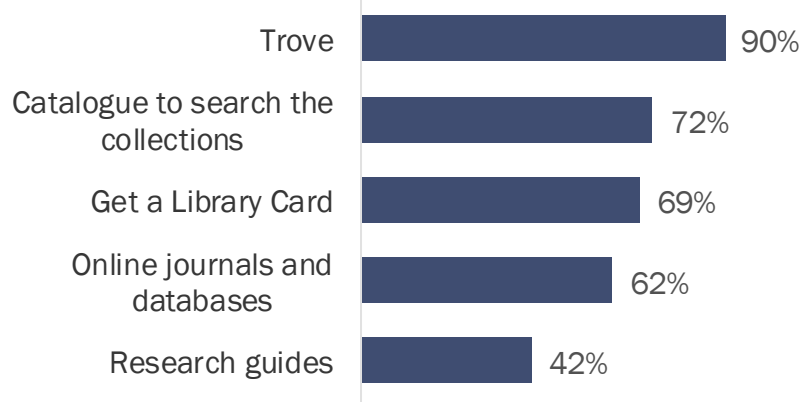
## Library Card holders believe the National Library of Australia...



## Top 5 reasons Library Card holders always/frequently use the National Library of Australia



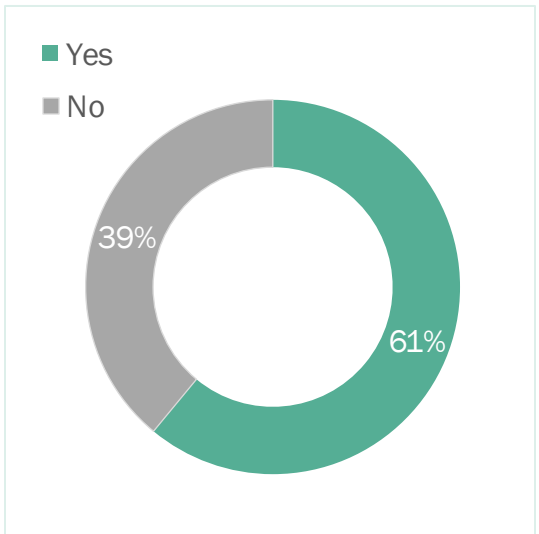
## Top 5 digital services used by Library Card holders



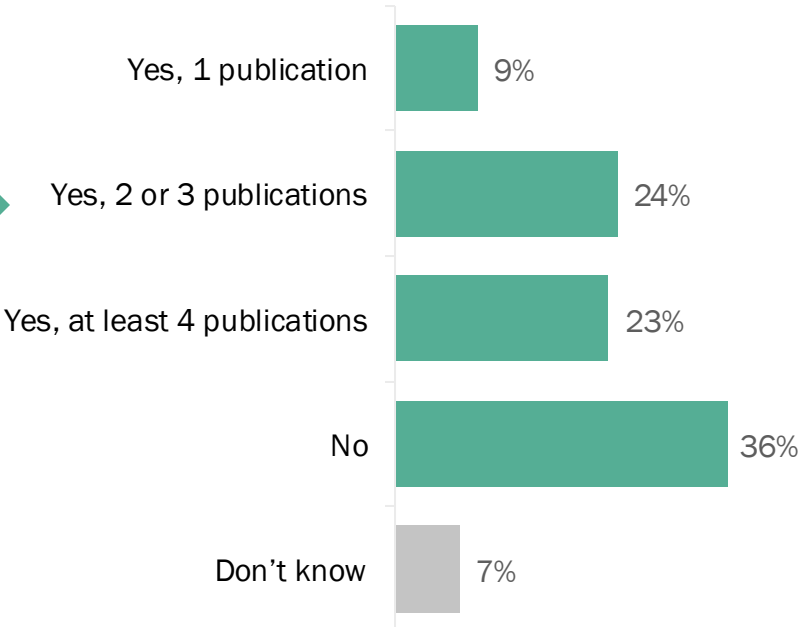


# 3 in 5 have heard of NLA Publishing – among those aware of the service, over half (57%) have made a purchase

Awareness of NLA publishing



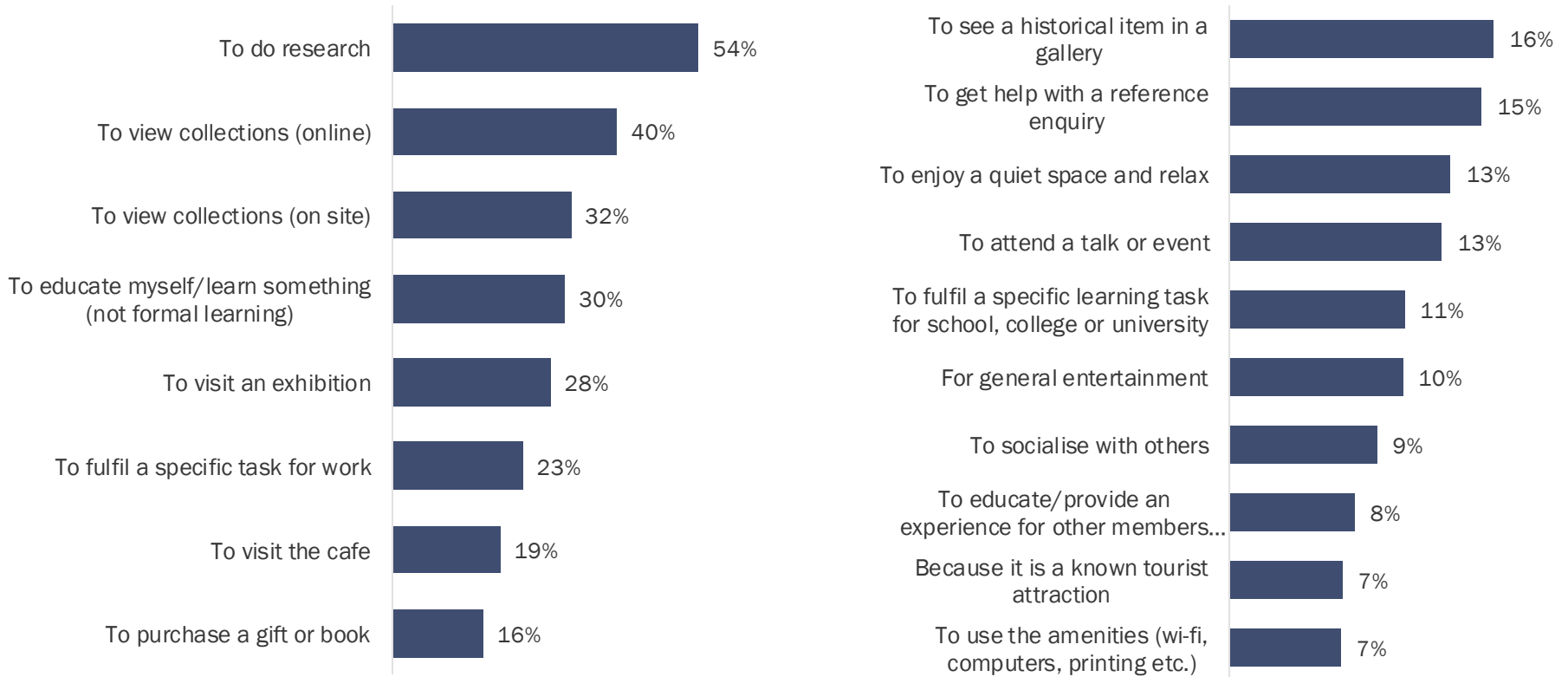
Purchased from NLA publishing – of those aware



# Undertaking research and viewing collections are key drivers for visiting

This differs to the general population who are more likely to visit for leisure, entertainment and social reasons

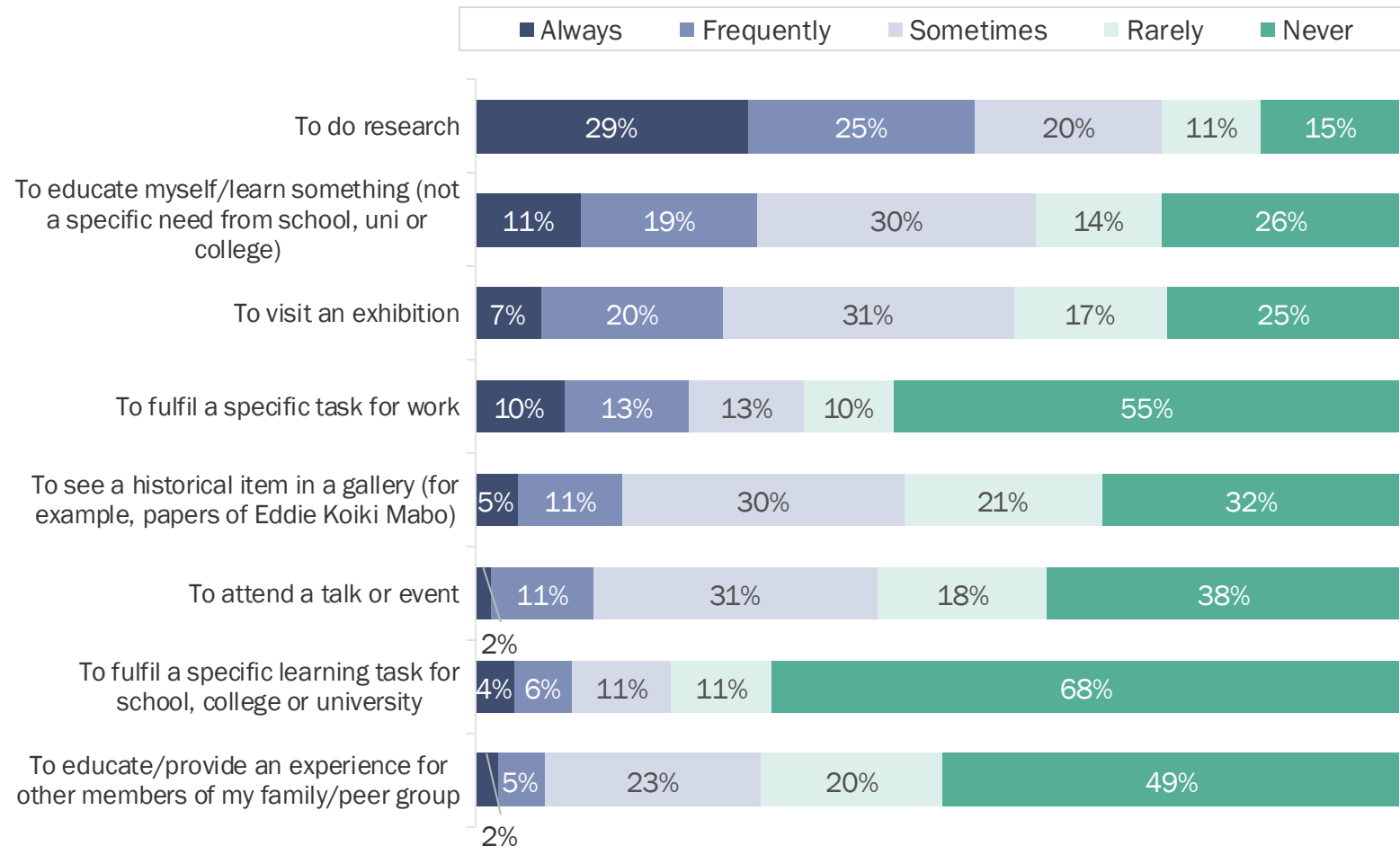
Reasons for visiting the National Library of Australia



***Listening too closely to a highly engaged audience will result in a bias that may not reflect what everyday Australians are seeking from the library***

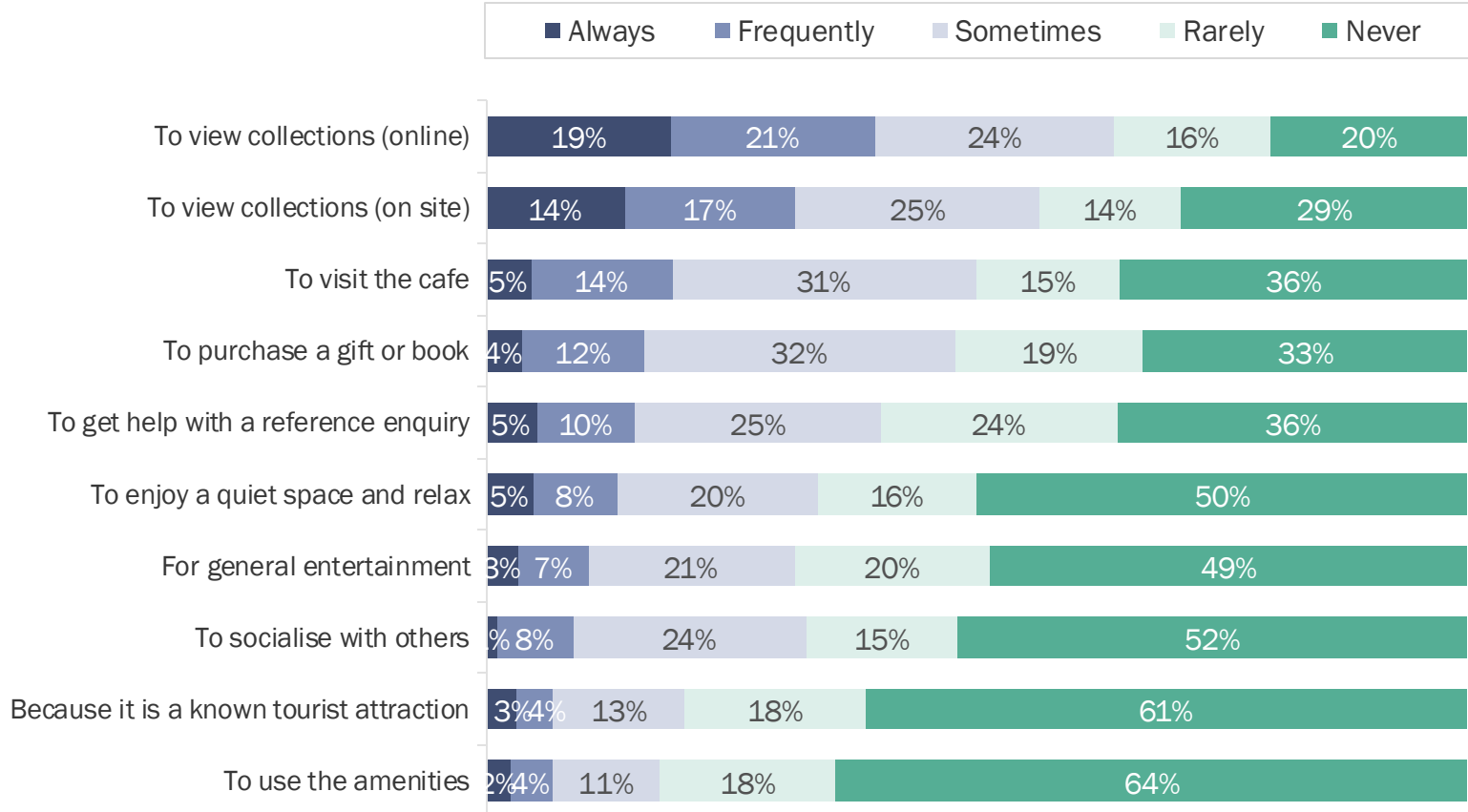
Amongst the current audience, doing research is by far the main reason for using/visiting, with half doing so always or frequently, and just 15% never doing this

Frequency of visiting the National Library of Australia



# Viewing collections is another key motivator, with the majority (80%) of the current audience using/visiting for this reason, and 40% doing so always or frequently

Frequency of visiting the National Library of Australia



**Expanding accessibility online is a key avenue to drive usage amongst the highly engaged audience**

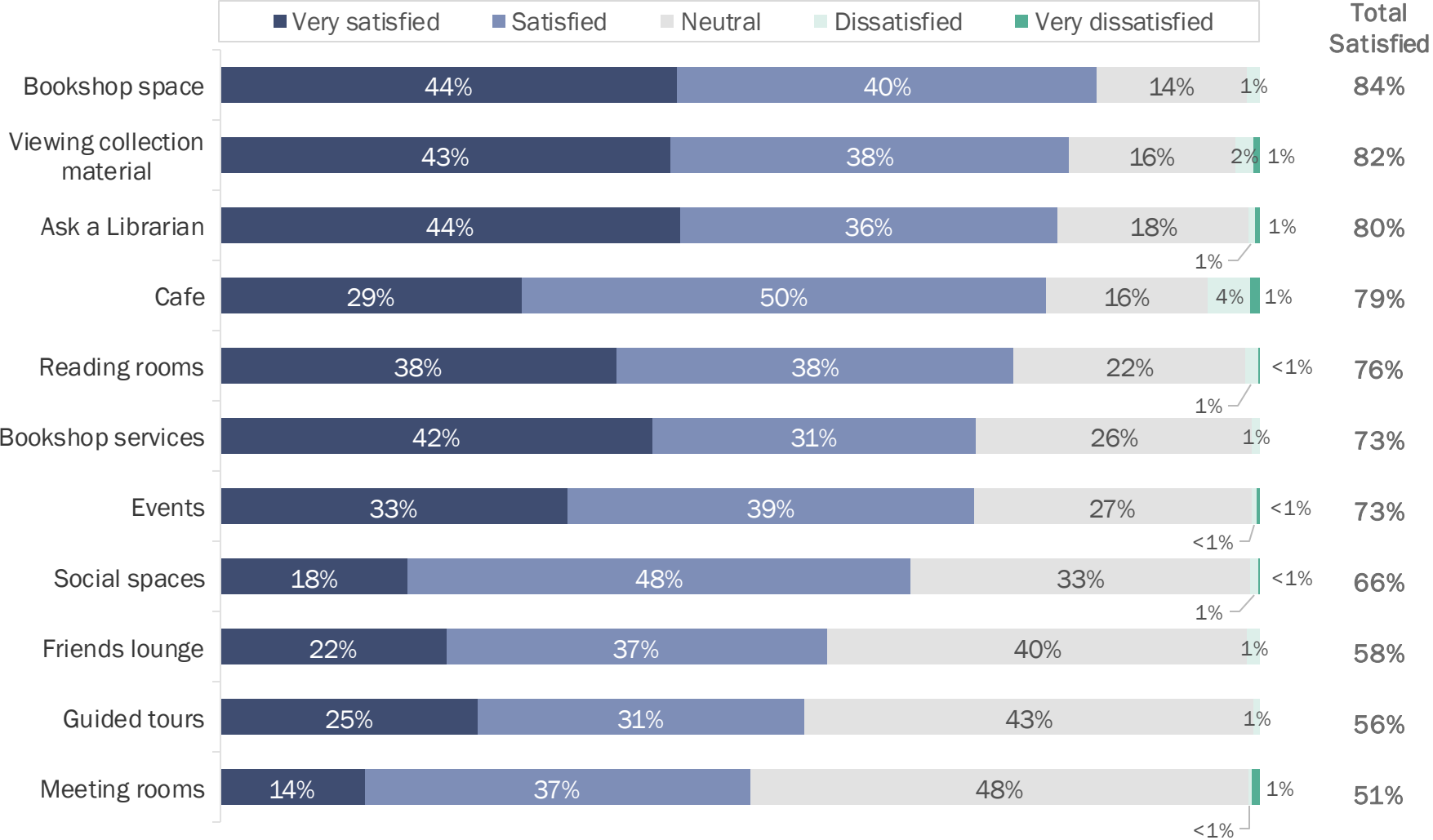
## 4.3

# Satisfaction and advocacy

Satisfaction across library services and spaces are high with no areas of dissatisfaction. As a result advocacy is high with a Net Promoter Score of 67.

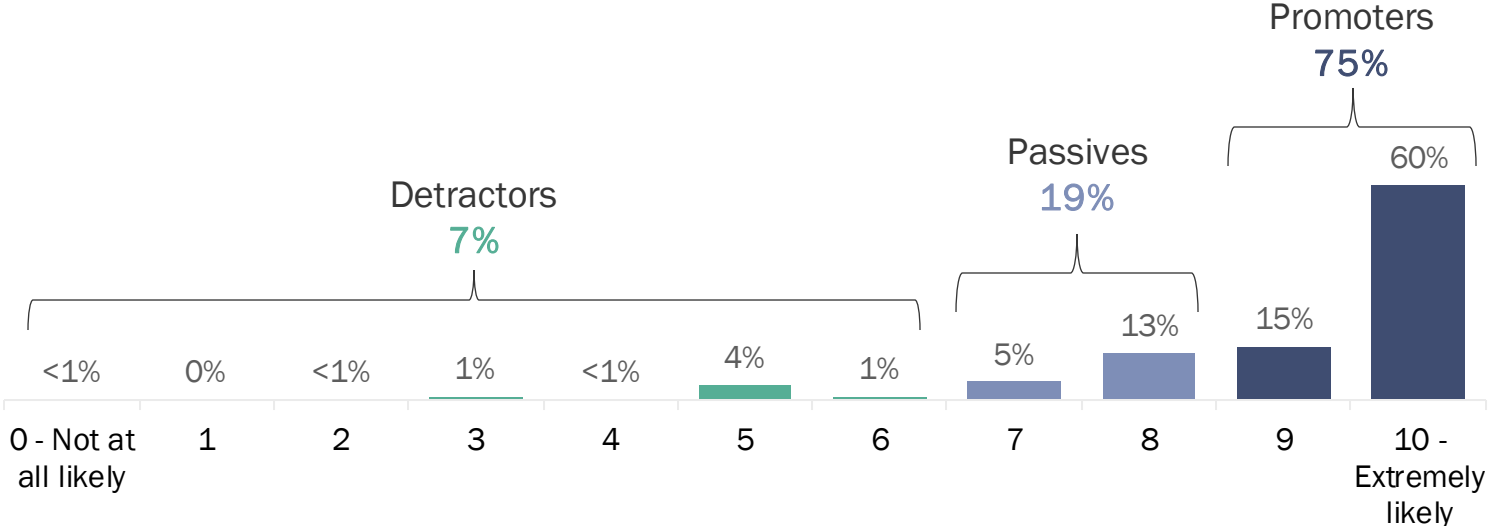
# With most already highly satisfied, the National Library of Australia's engaged audience offer little guidance on key areas the library can improve on

Satisfaction with the National Library of Australia's services and spaces



# High levels of satisfaction are reflected in strong advocacy scores, with three quarters of the current audience classified as Promoters and less than one in 10 Detractors

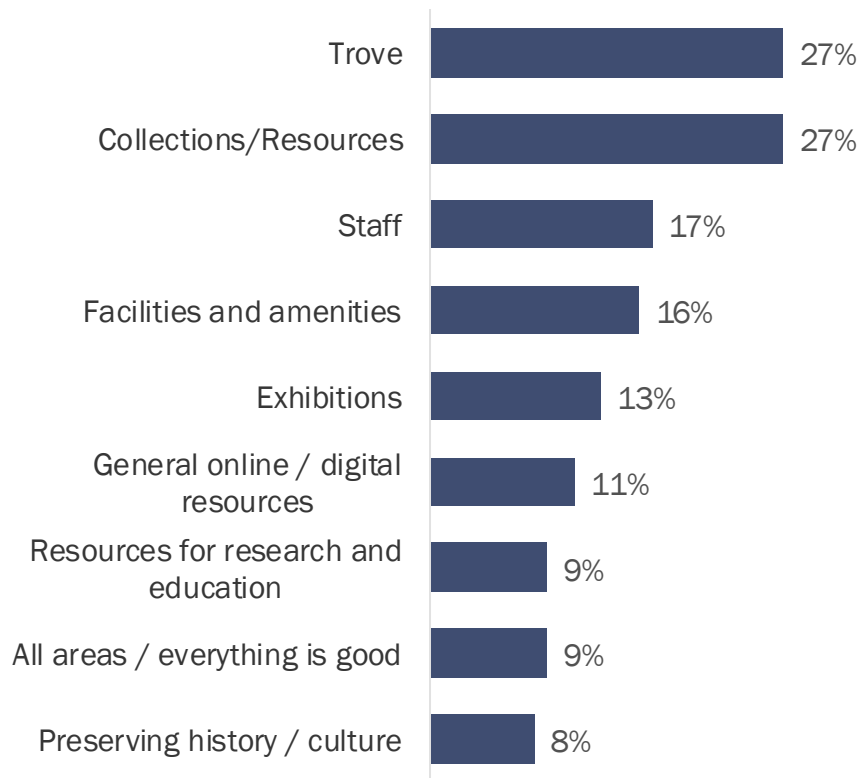
Likelihood to recommend the National Library of Australia



Net Promoter Score = Promoters - Detractors  
 NPS = 67

# An open ended question was asked to explore areas in which the National Library of Australia is performing well

Responses were coded and the main categories are presented below



Example comments

Overall very good in terms of a range of services to clients; events are delivered online/onsite to engage broad cross-section of community. TROVE website platform is very informative/accessible.

Service provided by the librarians. Availability of Australian publications (monographs, MSS, Journals, Trove)

I am a Petherick reader so provision of special collections and help from staff are very important. I think the NLA performs well in this area.

During COVID, the online access has been great for me living in Regional NSW.

Its collection of early reference material (i.e. up to about 1990) is exceptional, comprehensive and diverse.

It has many resources useful to me that are not accessible from my university library.

Since I only use the library to access the digital information and resources, I would have to say that it has an excellent online presence.

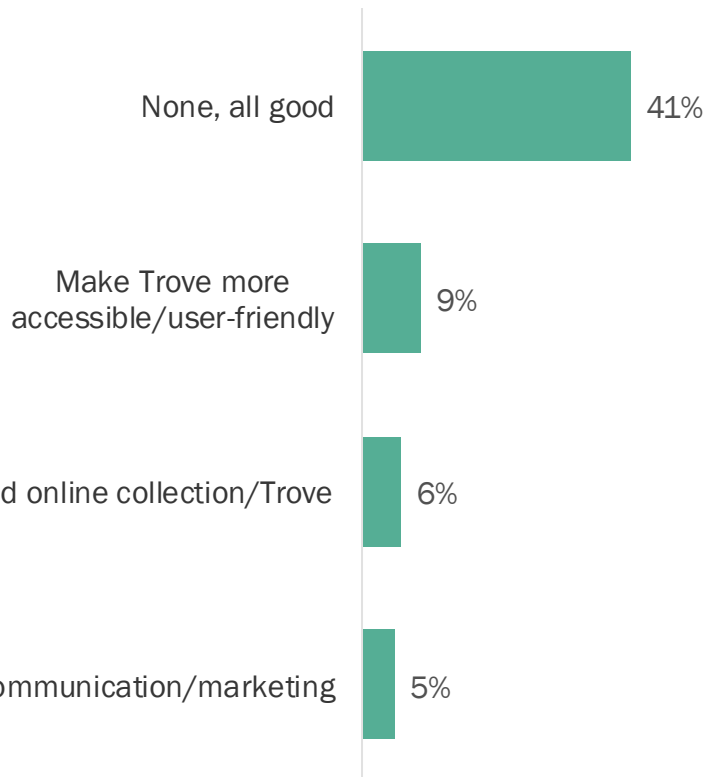
I've liked the webinars that have run during 2020 and the bookshop series with the authors.

Digitisation of newspapers is fantastic!



# An open ended question was asked to explore areas in which the National Library of Australia could improve

Responses were coded and the main categories are presented below



Example comments

Connections with schools. As a Teacher Librarian, I would like regular information about helping my students (e.g., copies direct, research programs linked to curriculum etc.).

The capacity of the Trove system to handle multiple user requests.

Bookshop items are horrendously expensive (lovely and exquisite, but everything is so expensive!); queues at the café and slowness of service are annoying.

Accessibility for people outside of Canberra, so digitising much more material for Trove.

Knowledge of collections and adaptation of use to those collections. Updating metadata to reflect new researcher needs.

Please make books available in a digital format for all Australians to access free of charge.

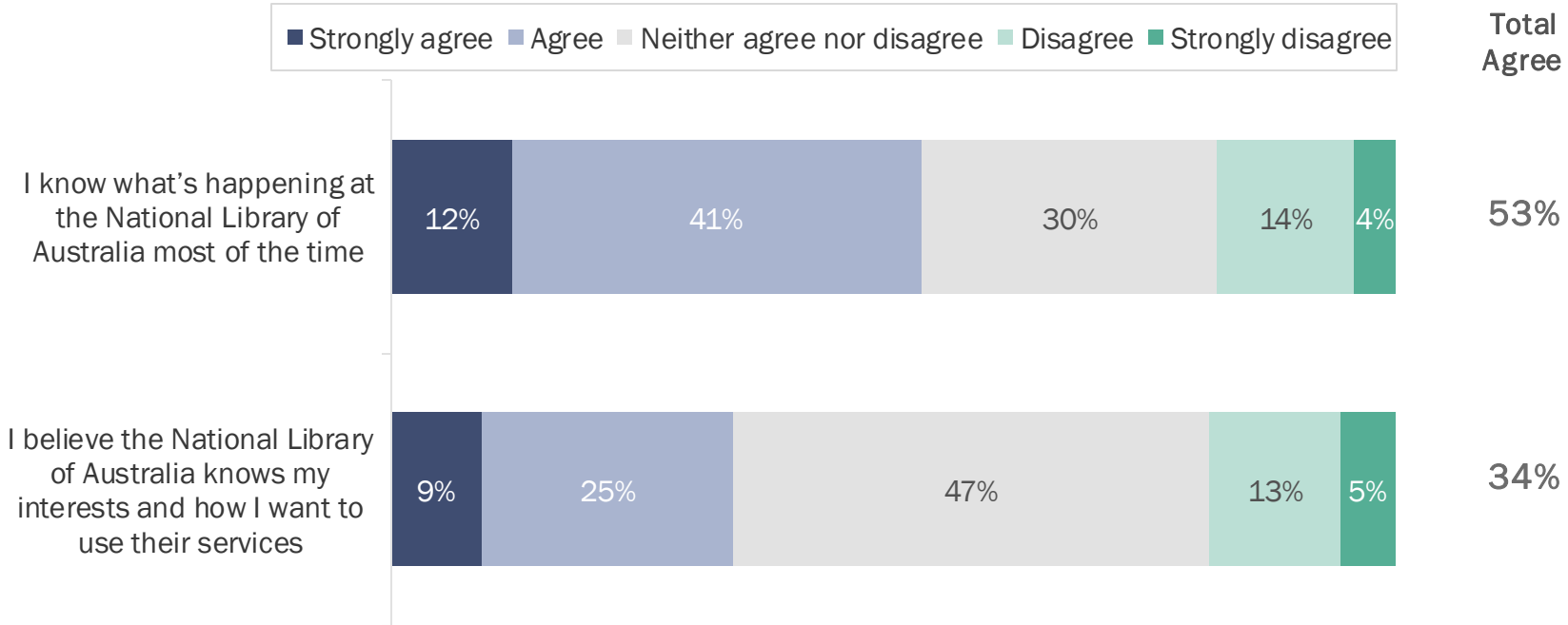
Increasing the online search options. Fixing Trove to search by state. Spending the money to hire staff to scan more items on lines rather than having to visit physically. All microfilm should be online.

Trove could be more easy to use, particularly for infrequent users.

More tours behind the scenes.

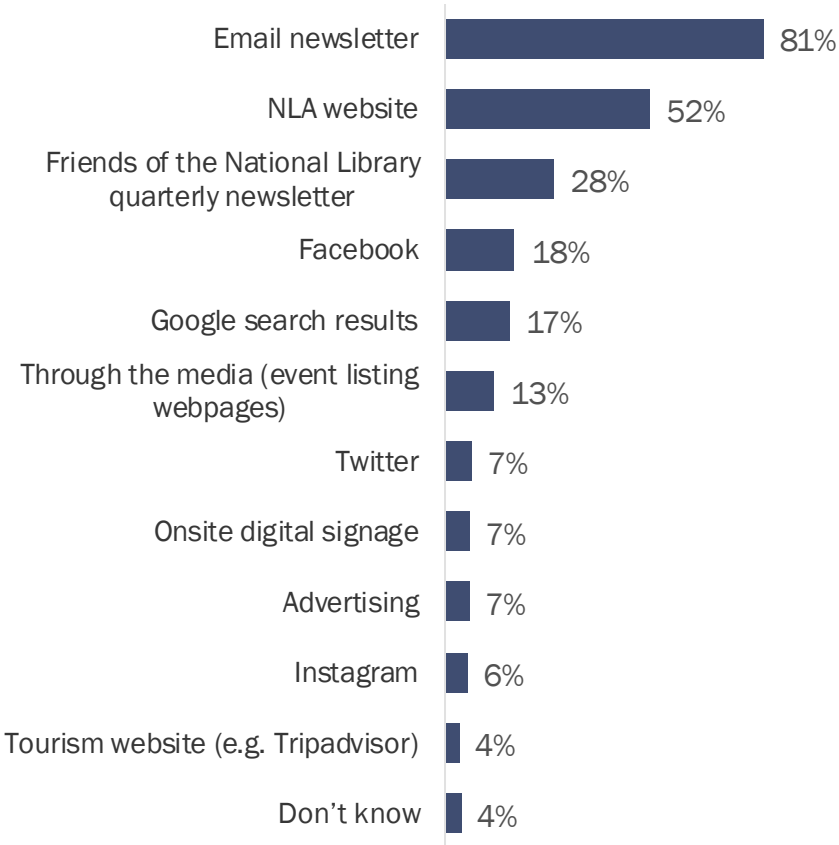
# There is an opportunity to both better promote the library and for communications to be more targeted

The National Library of Australia's communication with the current audience

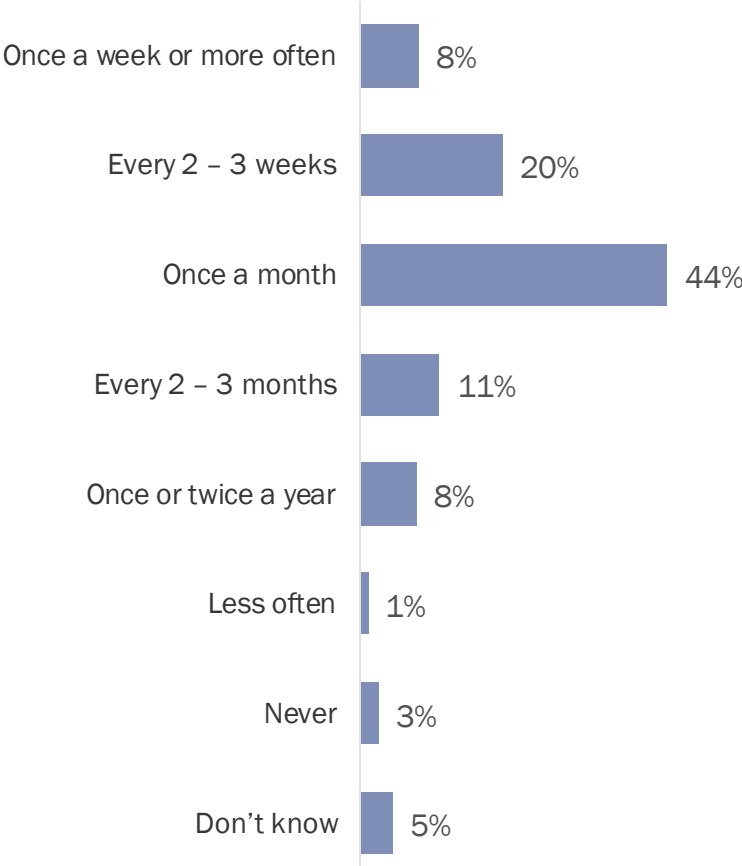


# There is a general preference for communication via email newsletter, once or twice a month

Preferred communication channels



Preferred frequency of communication





## Intercept interviews



# 5.1

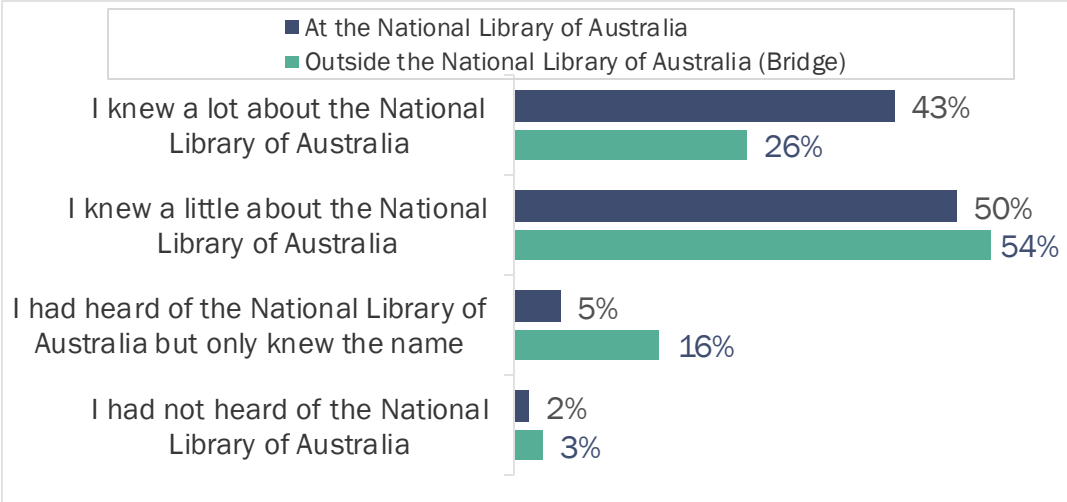
## Awareness

Local awareness of the National Library of Australia is strong, but could be improved with travellers.

1 in 10 travellers had not heard of the National Library of Australia and a third did not know where the building was located.

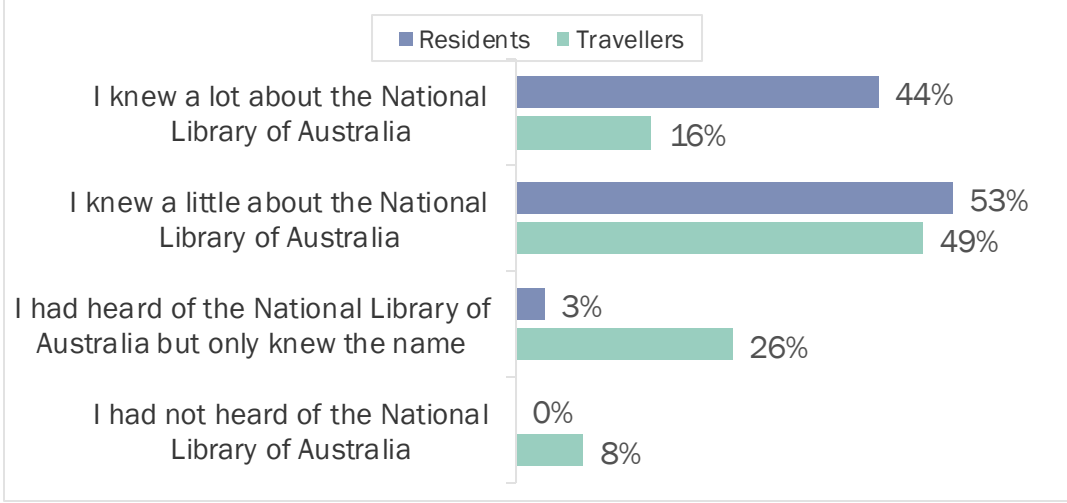
# The National Library of Australia benefits from strong local awareness but is not reaching interstate visitors

Awareness by location



- Almost all (98%) respondents surveyed **on-site** were aware of the National Library of Australia before that day, and over 2 in 5 (43%) ‘knew a lot’
- Awareness was lower amongst those surveyed at the **bridge**, with 1 in 5 *unfamiliar* with the National Library of Australia

Awareness by residence

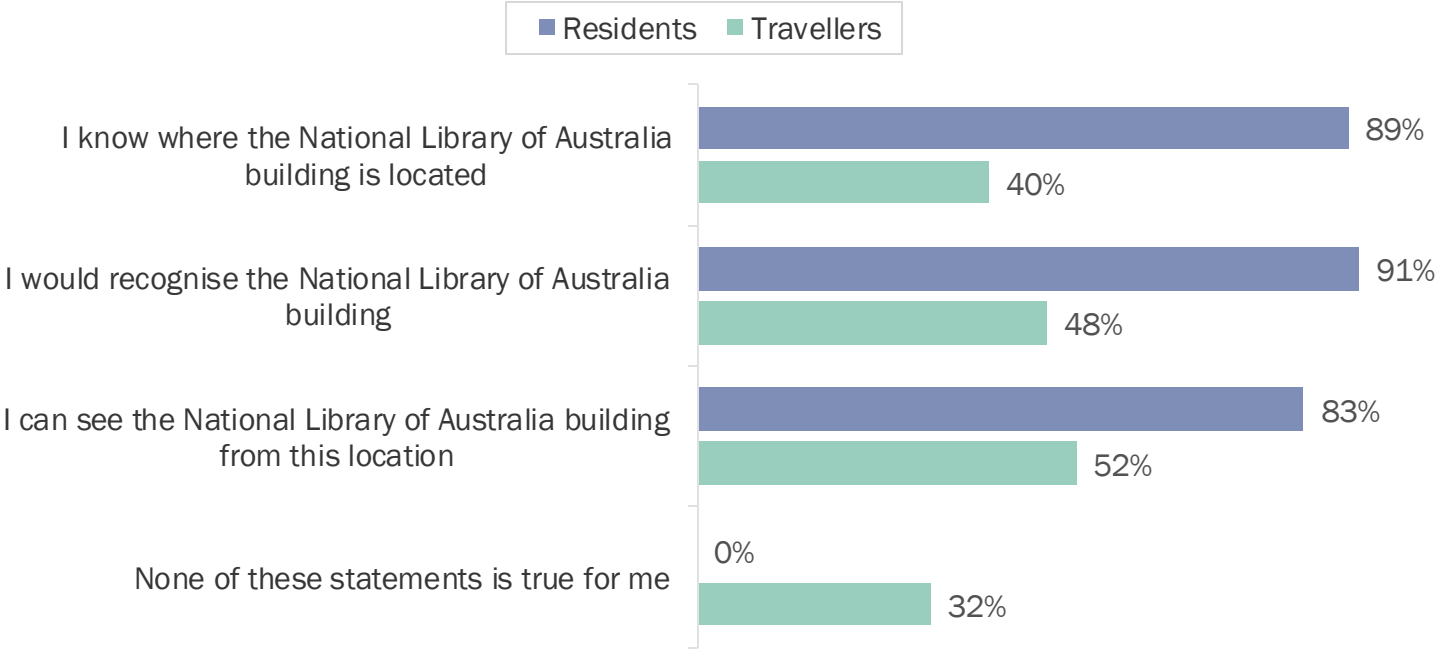


- Whilst more than 2 in 5 **ACT residents** surveyed knew a lot about the National Library of Australia, only 16% of interstate respondents ‘knew a lot’
- Amongst **interstate travellers** surveyed at the bridge, 12% had not heard of the National Library of Australia at all

# A third of interstate travellers could not recognise the National Library of Australia building

Conversely local residents either knew where the National Library of Australia is located, would be able to recognise the building, or correctly identified the building

Recognisability of the National Library of Australia

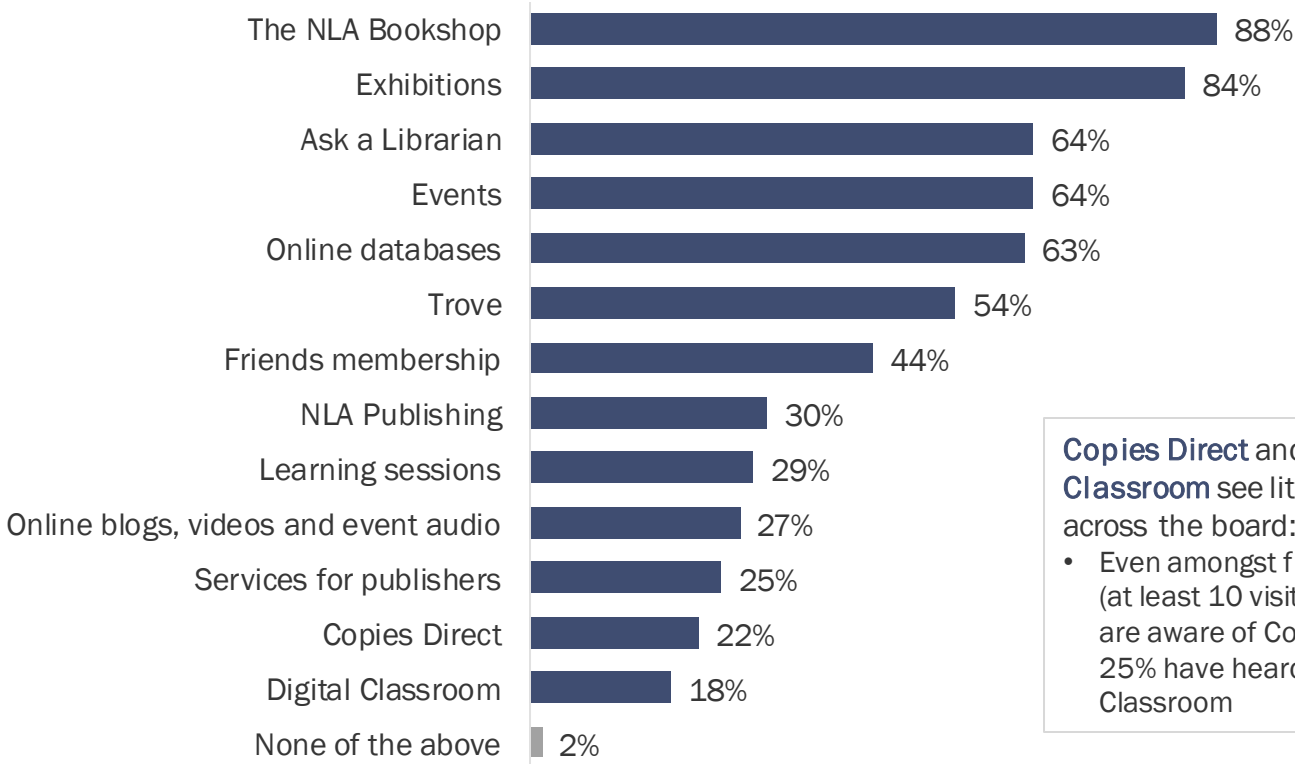


**Improving visibility and recognisability of the National Library of Australia building is an important first step in starting a national conversation**

# Amongst those who have previously visited the National Library of Australia, almost all were aware of at least one listed service

Visitors surveyed on-site were more aware of library services compared to visitors surveyed at the bridge

Awareness of the National Library of Australia services



On average, the **bookshop** was the most recognisable service across all visitors:

- Visitors intercepted at the National Library of Australia **94%**
- Visitors intercepted at the bridge **79%**

**Copies Direct** and **Digital Classroom** see little awareness across the board:

- Even amongst frequent visitors (at least 10 visits) only 38% are aware of Copies Direct and 25% have heard of Digital Classroom



## 5.2

## Visitation vs other sites

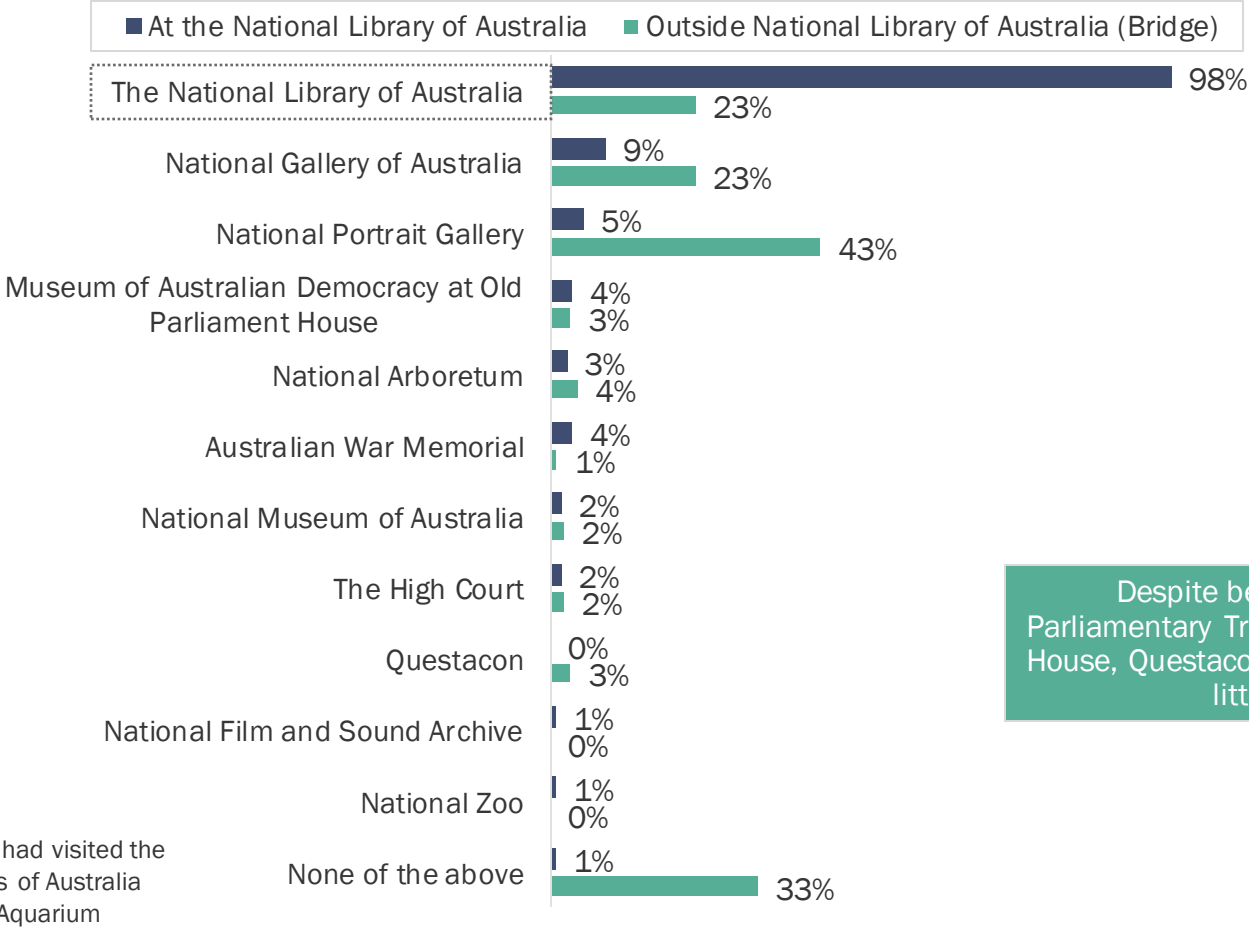
Amongst visitors to the Parliamentary Triangle, the National Portrait Gallery and the National Gallery of Australia are key competitors.

Looking at interstate travellers specifically, visitation to the National Library of Australia is much lower than all other sites / venues apart from the National Archives of Australia and The High Court.

# For those visiting the Parliamentary Triangle, both galleries are strong competitors to the National Library of Australia

Visitors surveyed on the bridge were nearly twice as likely to be visiting the National Portrait Gallery compared to the National Library of Australia

Visitation today by location

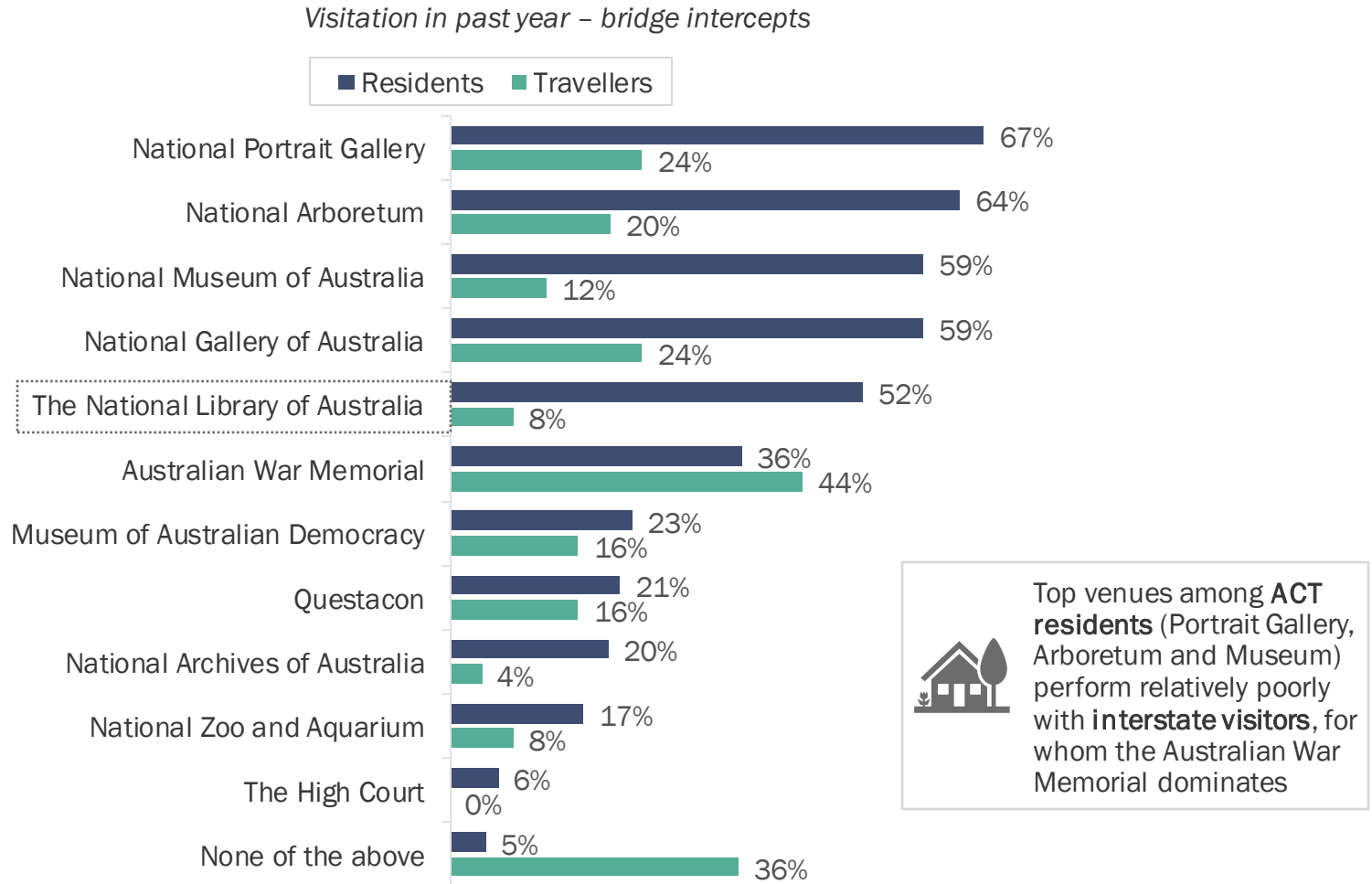


Despite being situated in the Parliamentary Triangle, the Old Parliament House, Questacon and the High Court saw little visitation.

No respondents had visited the National Archives of Australia or the National Aquarium

# The National Library of Australia benefits from strong ACT visitation but fares less well with interstate travellers who are most likely to visit the Australian War Memorial

Visitation intentions differ greatly between those living in ACT and those visiting the territory



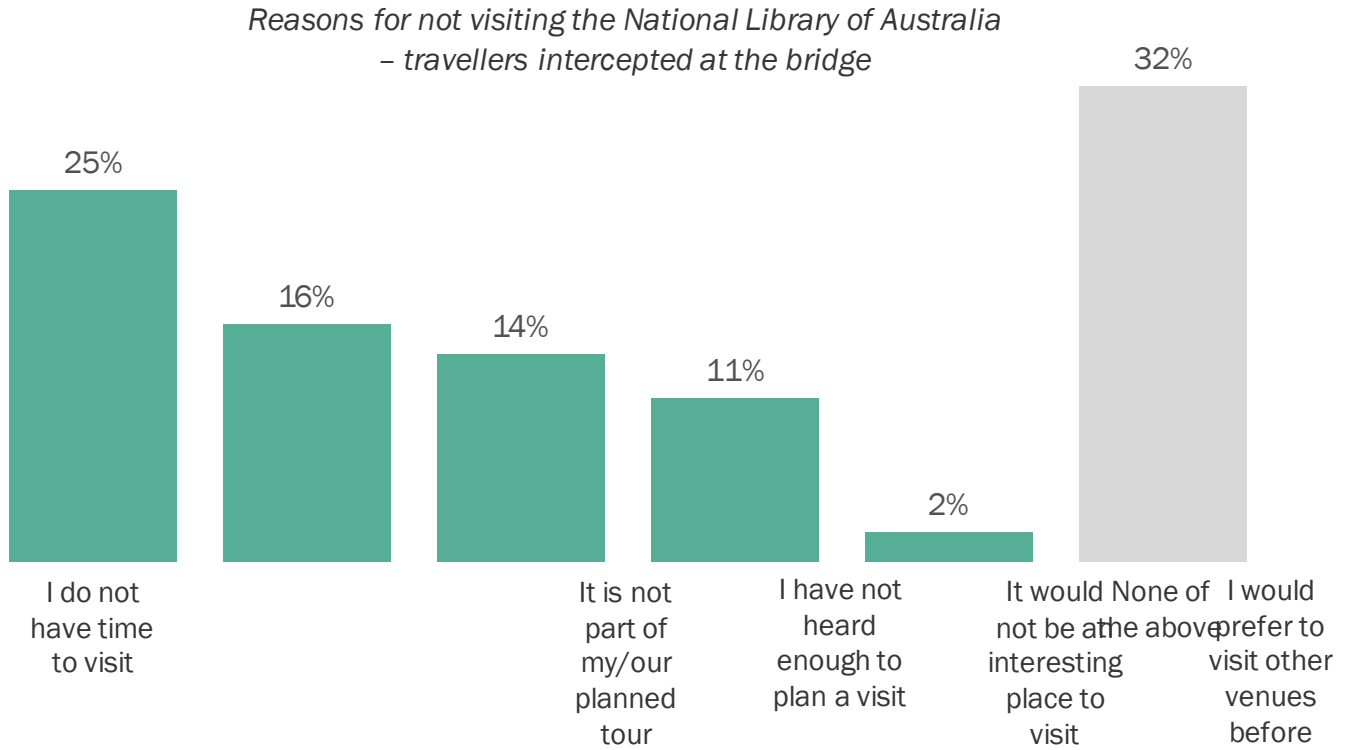
These figures represent those intercepted on the bridge outside the National Gallery of Australia, National Portrait Gallery and the High Court

Q3. Which of the following sites/venues, if any, are you visiting/have visited the past 12 months? Base: Canberra residents intercepted outside (n=66)

Q4. Which of the following sites/venues, if any, are you visiting/have visited as part of your trip to Canberra (not including those sites visited/visiting today)? Base: Non-Canberra residents (n=25\*) \*Caution low sample size

# Most reasons preventing travellers from visiting the National Library of Australia can be overcome with improved visibility, awareness and promotion

Partnerships with planned tours either through leisure groups or school would seem an easy win



***Winning visitor time will be more difficult and requires the National Library of Australia to provide the experience I am looking for***

These figures represent those intercepted on the bridge outside the National Gallery of Australia, National Portrait Gallery and the High Court

## 5.3

### Visitation drivers

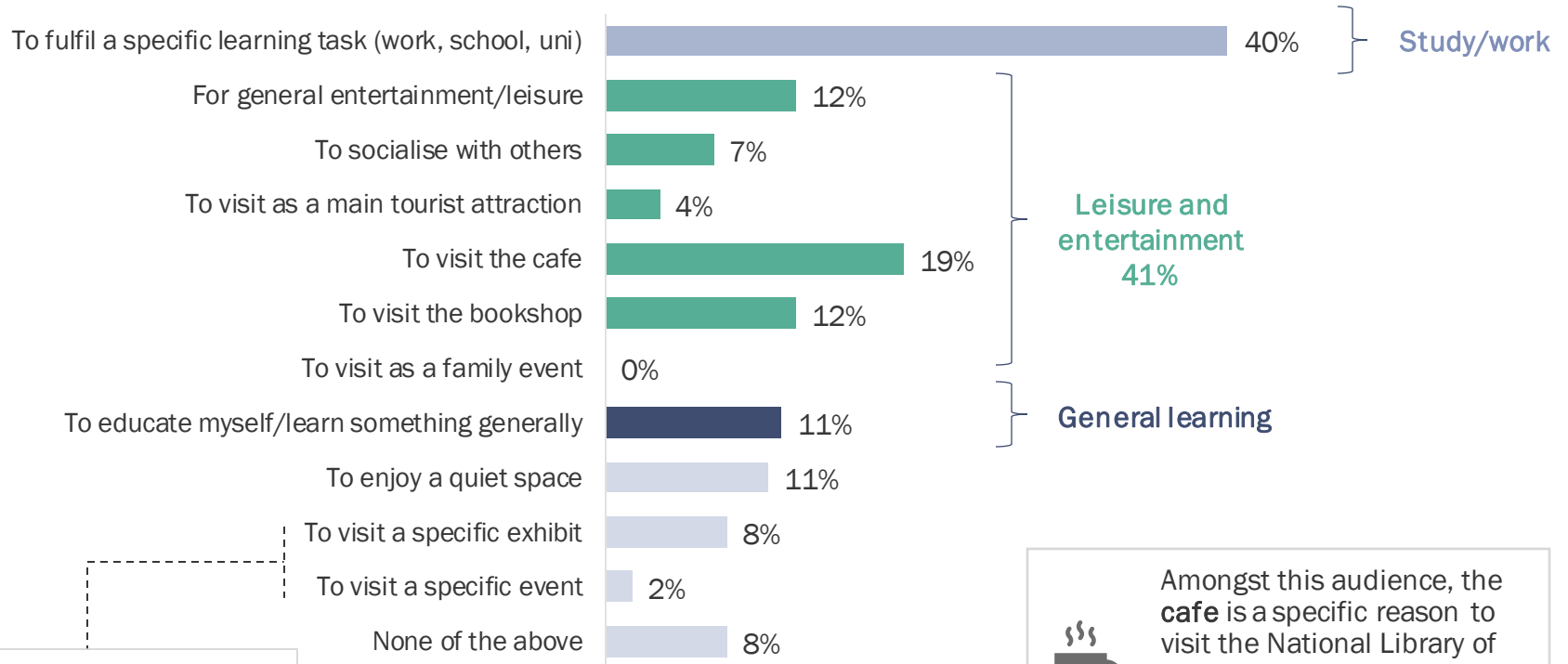
Visitation of the National Library of Australia is dominated by study/work tasks, more so than recorded in the general population survey. This suggest on-site visits are more often driven by study/work tasks.

Visitation drivers vary between Canberra residents and interstate travellers. Whilst **all** visitors are motivated by general learning, travellers are more likely to visit for leisure/entertainment reasons, or to see an exhibition.

Study/work drive frequent visitation by locals, with the leisure activities more of an occasional reason to visit.

# A large majority of those at the National Library of Australia were there for study/work reasons which is much higher than found in the general population survey

Reasons for visiting the National Library of Australia  
- intercepted on-site

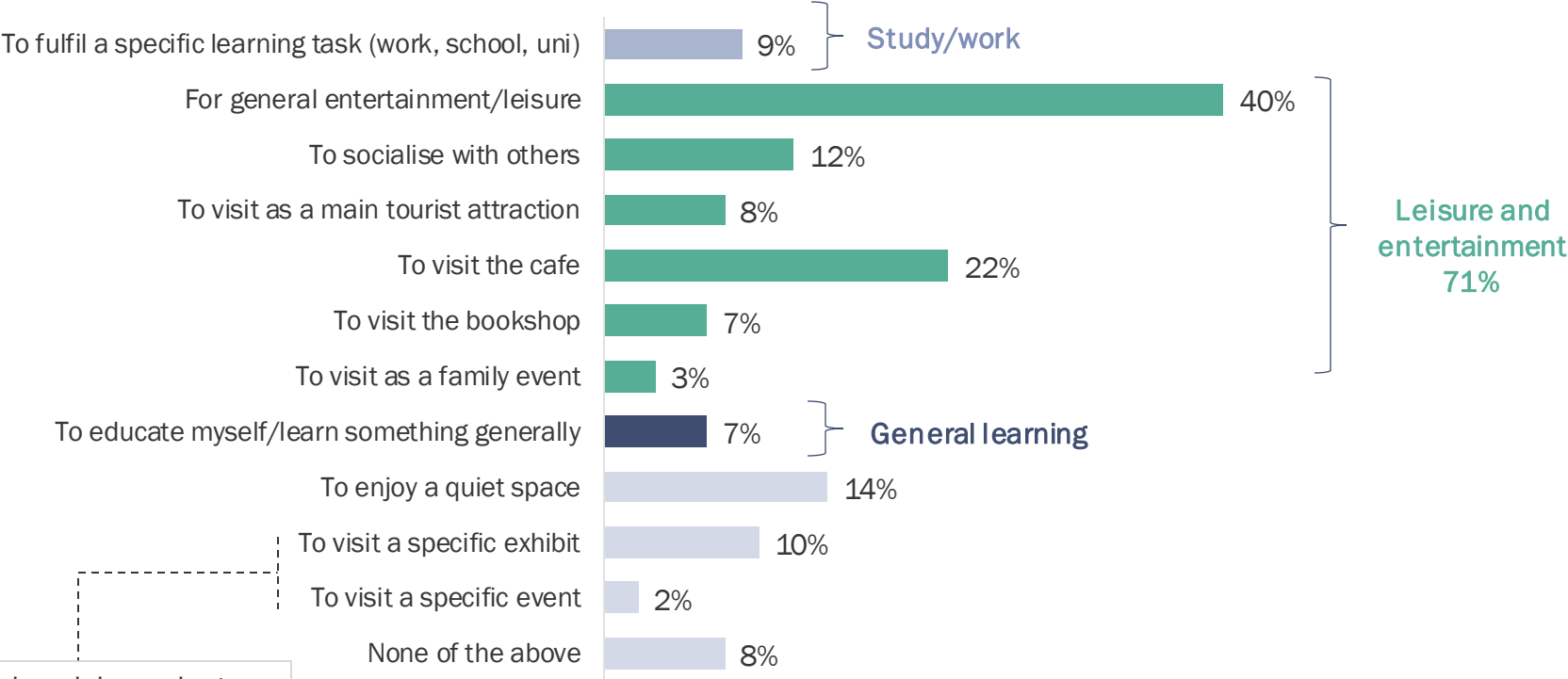


Undefined, and dependent on the nature of the exhibit/event. It could be for leisure and entertainment or for learning purposes.

Amongst this audience, the **cafe** is a specific reason to visit the National Library of Australia, which compares to the current audience survey in which the cafe was the weakest visitation driver

# By contrast 7 in 10 of those at the bridge were on the premises for leisure and entertainment and very few there to complete work or study learning tasks

Reasons for visiting the premises  
- intercepted at the bridge

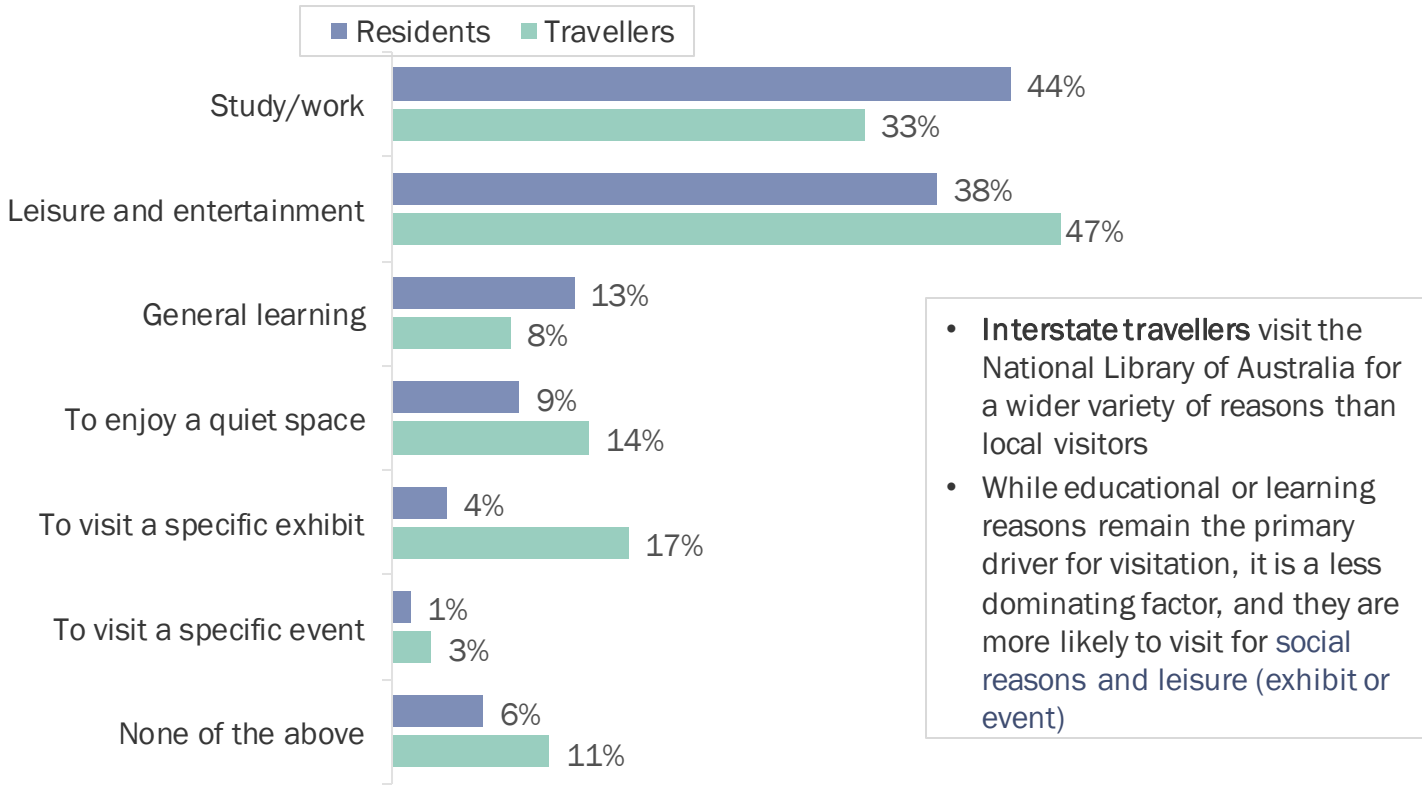


Undefined, and dependent on the nature of the exhibit/event. It could be for leisure and entertainment or for learning purposes.

# Residents are highly focused on the educational offering and this is by far their strongest driver of visitation

This suggests that a more engaged audience with greater access to the National Library of Australia building will skew towards the educational and research services

Reasons for visiting the National Library of Australia by residence  
- intercepted on-site

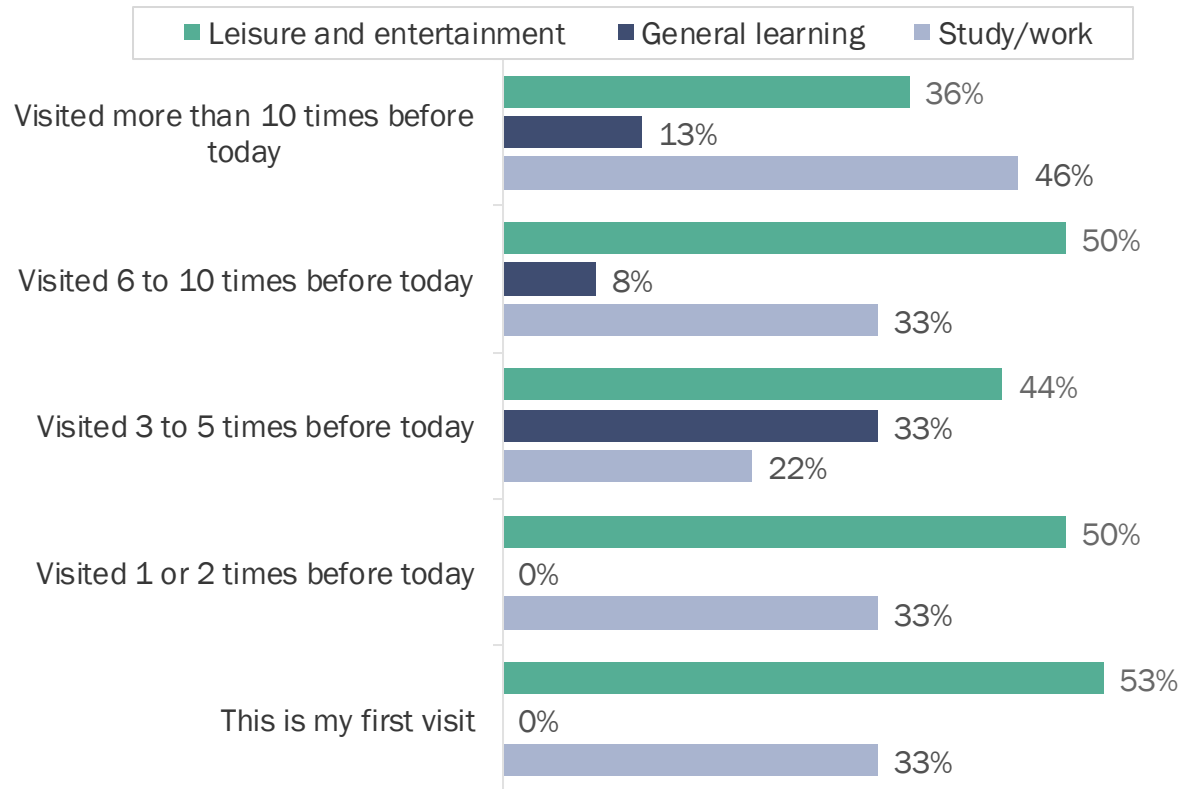




# Frequent visitors engage with the National Library of Australia for educational or learning reasons

The frequency of visitation correlates with the strength of education as a motivator. The more someone visits, the more likely they are to be doing so for educational reasons

Frequency of visitation vs reasons for visiting  
-intercepted on-site

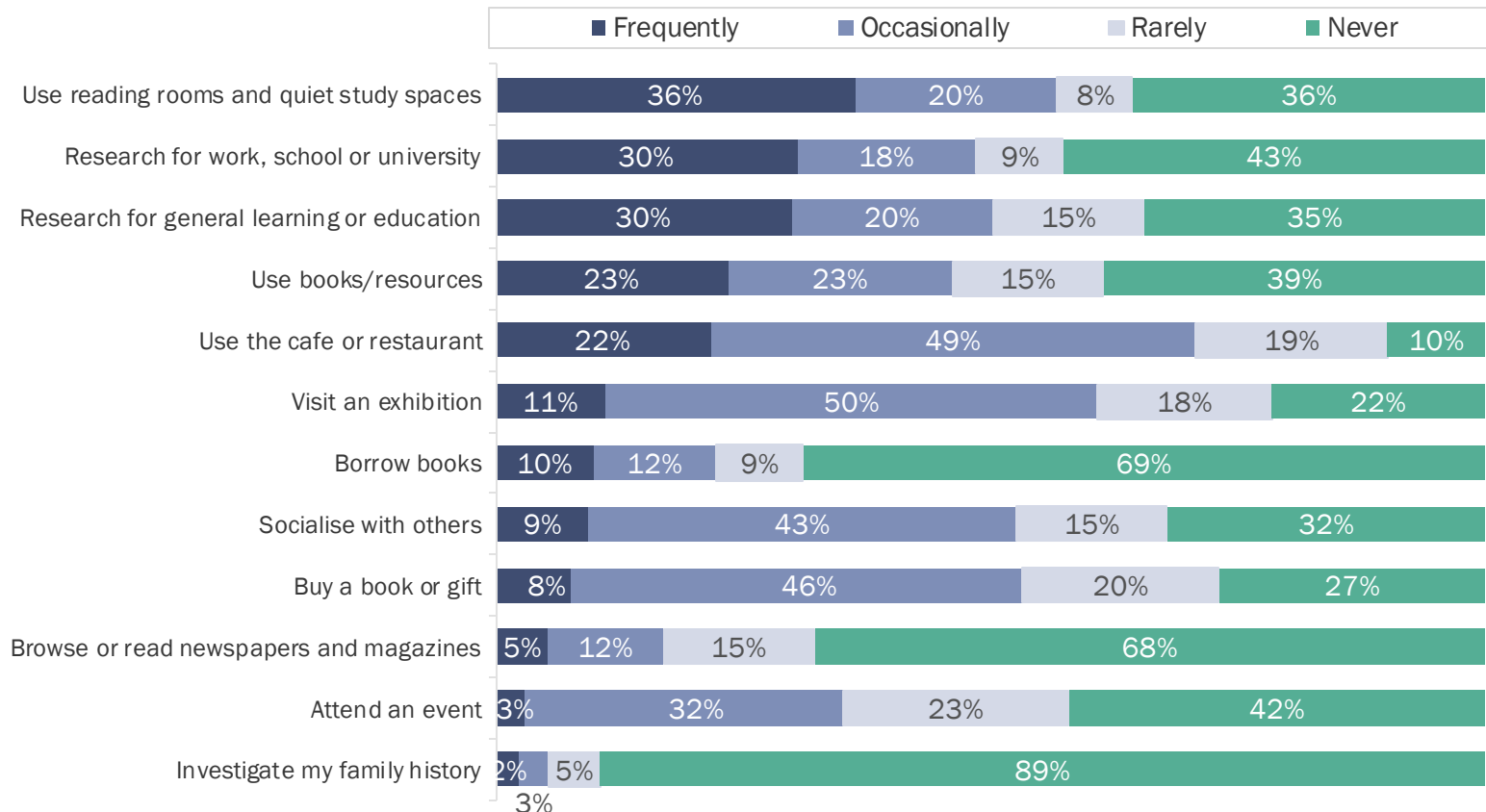


Only a third of **first-time visitors** decided to check out the National Library of Australia for educational reasons. More than half began their journey with the library for leisure and entertainment reasons

# Educational resources drive frequent visitation, while social offerings are used occasionally

Exhibitions and events see low frequent use, but are commonly an occasional reason to visit. Their intermittent nature is the explanation behind low frequent use, and it is likely they see strong engagement with visitors

Reasons for visiting the National Library of Australia  
- visitors intercepted on-site



## 5.4

# Visitation and usage occasions

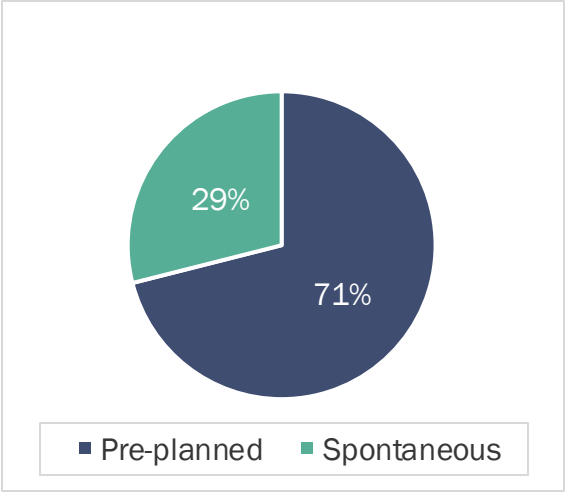
The reason for visiting largely determines which spaces visitors spend their time in. Those there for study/work are 1.7 times more likely to use the main reading room, while social/leisure visitors are 4 times more likely to use the exhibitions area.

Drivers/reasons for visits also correlate with time on-site, spontaneity of visits and whether visitors are alone or with others.

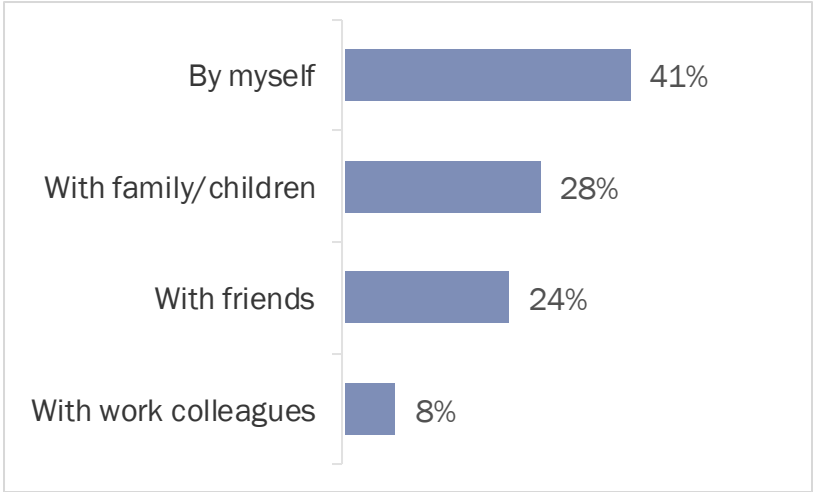
For the majority, the visit meets their expectations, with just 3% disappointed with their experience.

# Most National Library of Australia visitors make a planned visit by themselves and stay for 2.4 hours

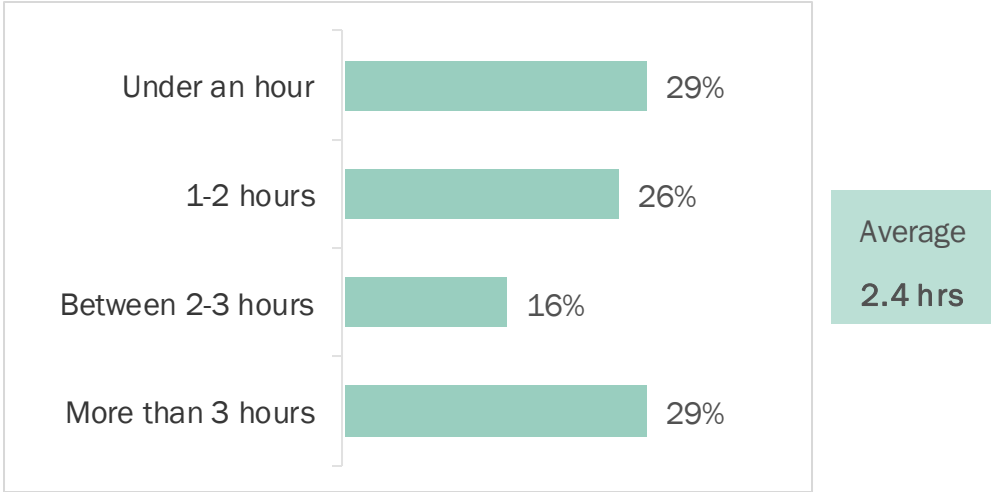
Nature of visit – on-site intercepts



People visiting with – on-site intercepts



Expected length of stay – on-site intercepts

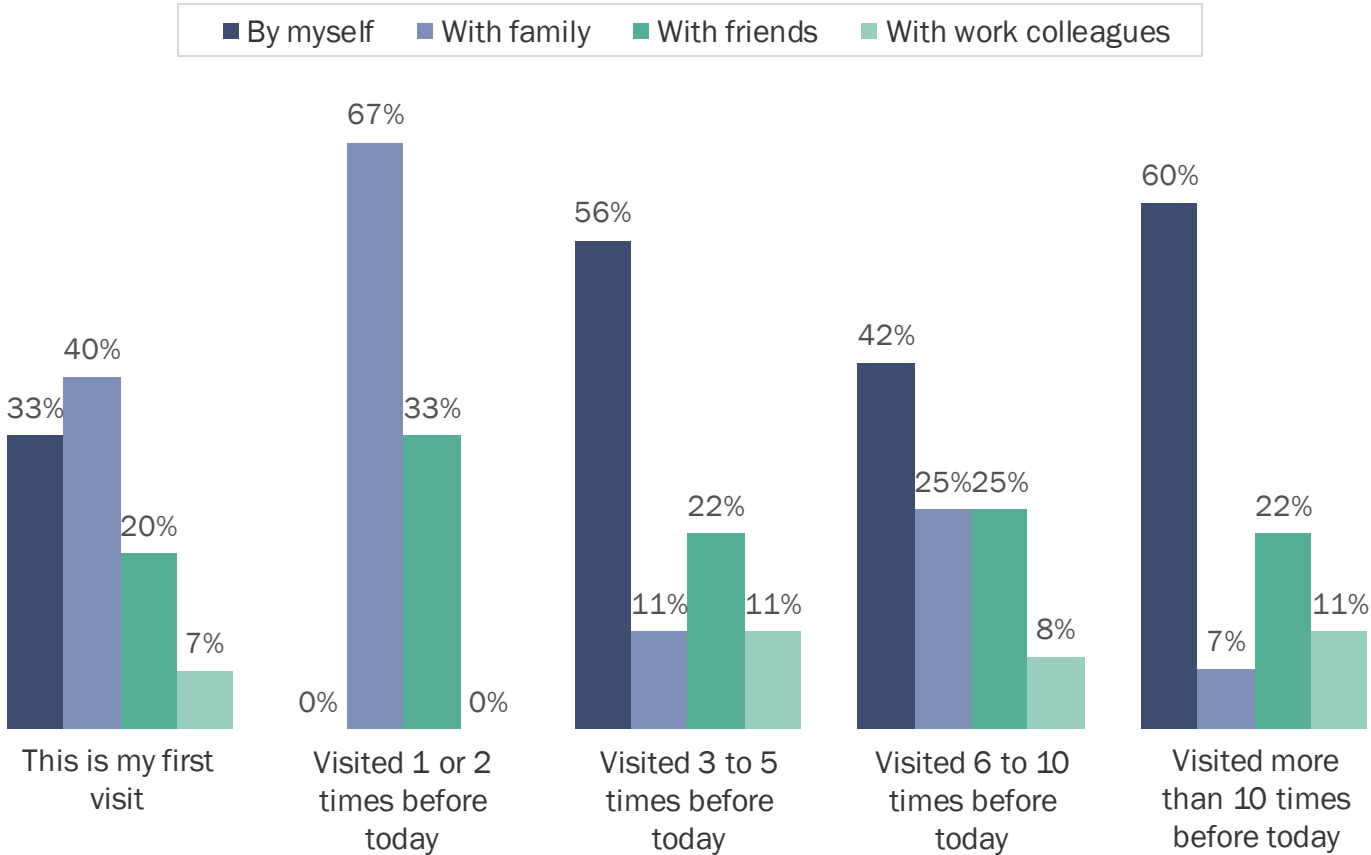


Q8. By the time you leave, how long do you expect to spend here today? \*Filtered to those on-site at NLA  
 Q9. Who are you here with today? \*Filtered to those on-site at NLA  
 Q10. Was your visit to the National Library of Australia...? \*Filtered to those on-site at NLA  
 Base: Intercept Survey at NLA (n=114)

# Frequent visitors are more likely to visit by themselves, with casual visitors attending with their families

Only a third of first-time visitors went by themselves, with most visiting as a social group. This supports the notion that social reasons are key visitation drivers for first-time visitors

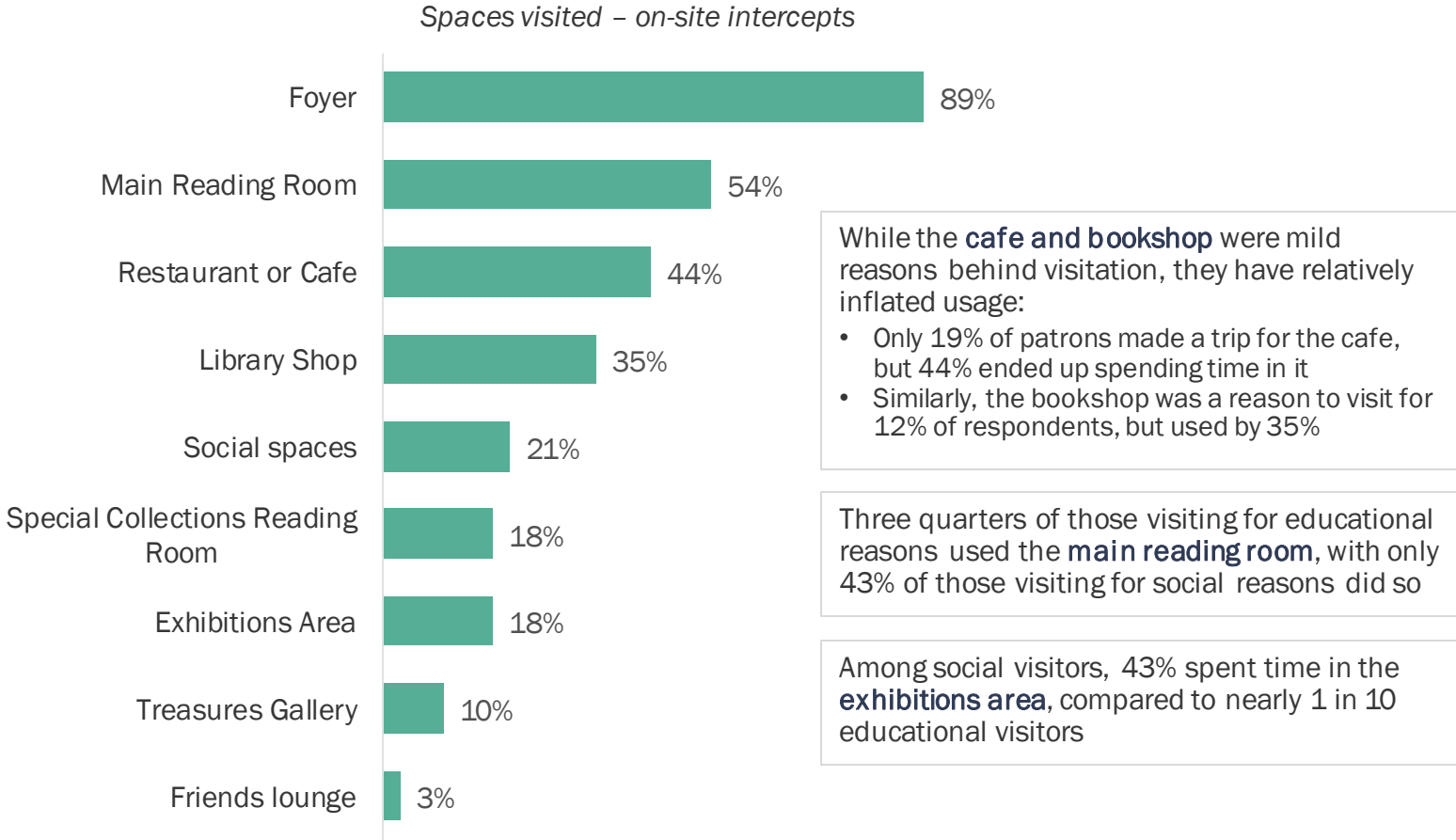
Frequency of visitation vs people visiting with – on-site intercepts



Q9. Who are you here with today? \*Filtered to those on-site at NLA // Q12. How often have you visited this site? \*Filtered to those on-site at NLA Base: Intercept Survey at NLA (n=114) / First time (n=15\*) / 1-2 times before (n=6\*) / 3-5 times before (n=9\*) / 6-10 times before (n=12\*) / More than 10 times before (n=72) \*Caution – low sample size

# The specific spaces visited are consistent with the reasons for visiting

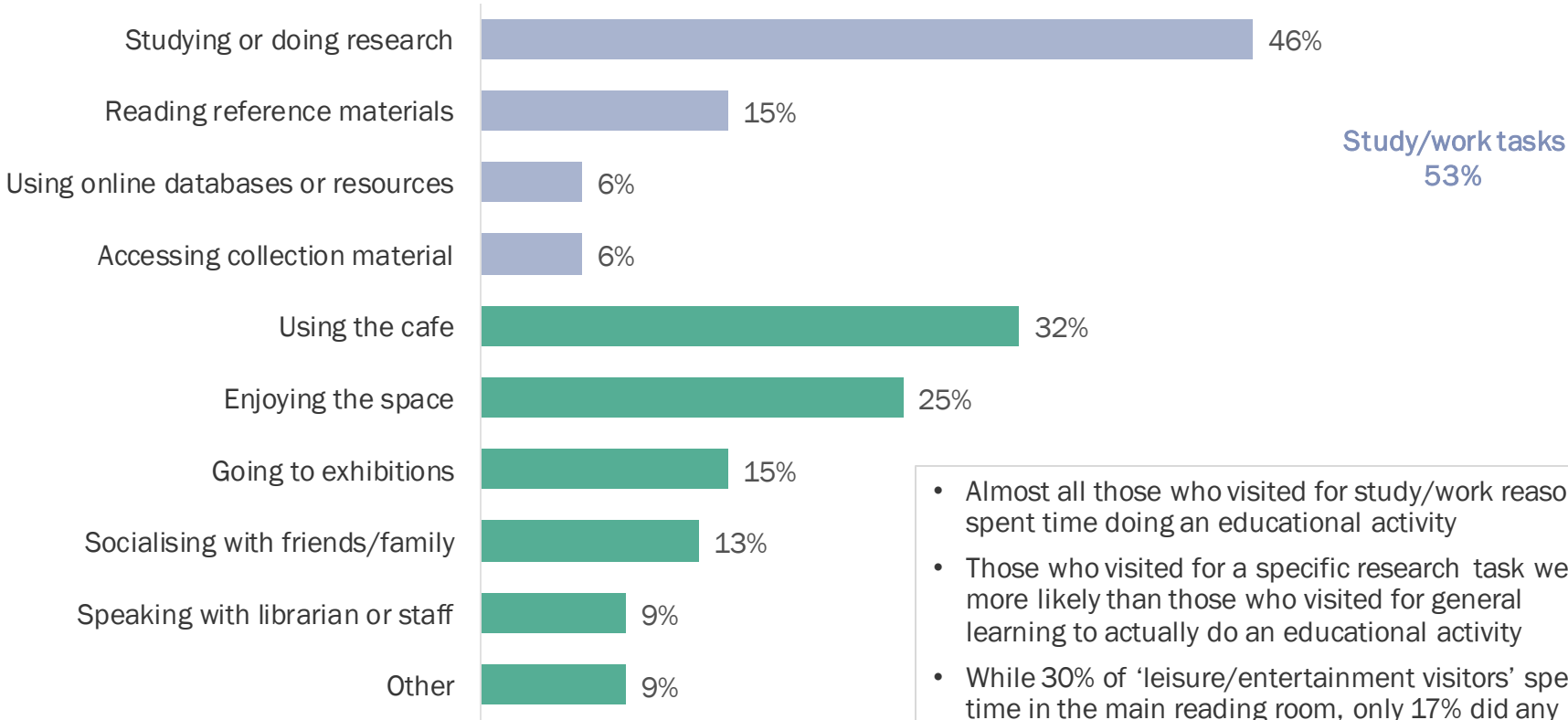
Over half of visitors used the main reading room which is consistent with the 48% who visited for educational reasons. Similarly, 1 in 5 used the social spaces which is consistent with those visiting for social reasons.



Activities engaged also reflect motivation, with the cafe being a key cross-sell (19% visited to go to the cafe, but 32% of all visitors did so)

Those who used the cafe and enjoyed the space were highly likely to be visiting for leisure/entertainment reasons. Despite this, a quarter of study/work visitors spent time also enjoying the space or using the cafe.

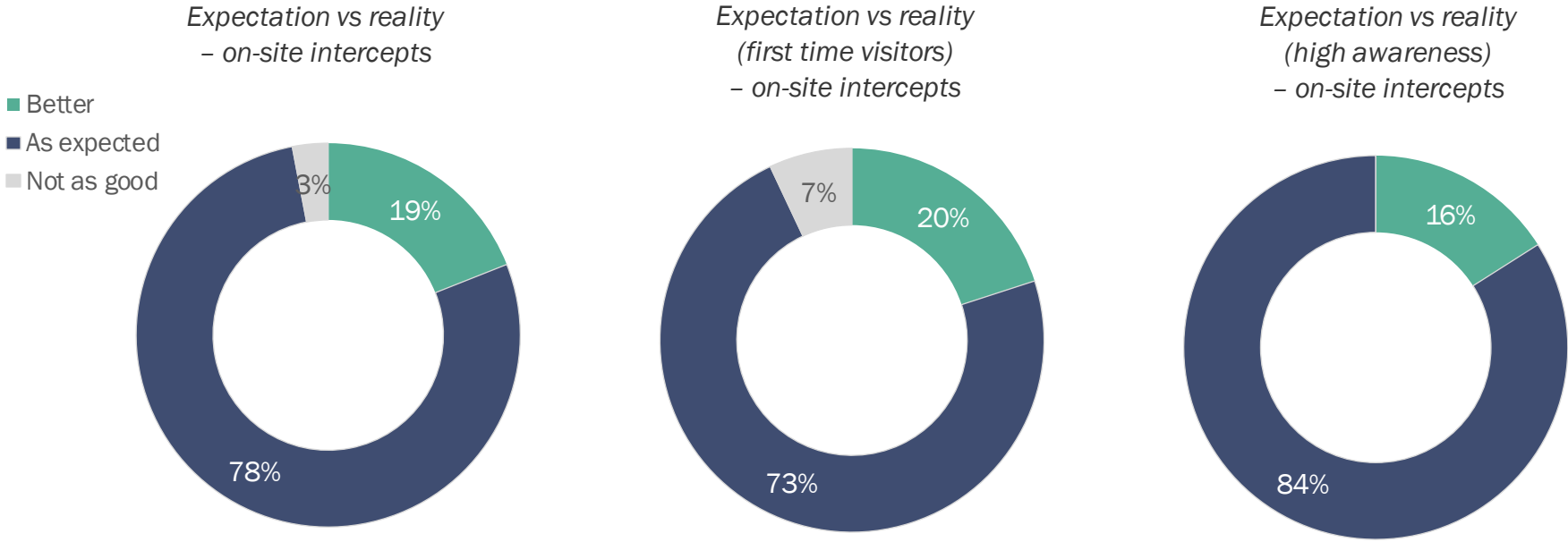
Activities during visit – on-site intercepts



- Almost all those who visited for study/work reasons spent time doing an educational activity
- Those who visited for a specific research task were more likely than those who visited for general learning to actually do an educational activity
- While 30% of ‘leisure/entertainment visitors’ spent time in the main reading room, only 17% did any educational activity during their visit
- Only 15% of those who visited for general learning attended an exhibition – most exhibition attendees were social visitors.

# The visitor experience generally reflected expectations

Overall, over three quarters felt that the National Library of Australia was as good as they expected, with 1 in 5 pleasantly surprised, and just 3% disappointed against their expectations





# Overall correlations suggest three core Usage Occasions bound by time



## One hour express visit

- One hour or less
- Often unplanned, 58% spontaneous
- Nearly always for general entertainment
- Mostly with others, rarely alone



## A leisure or learning visit

- Under 2 hours
- More likely to be visiting an exhibition, enjoying the space, relaxing
- More likely to be with others either family, friends or work colleagues



## A 3 hour+ study visit

- 3 hours or more on-site
- More likely to be studying, using online databases, reading reference materials, visiting the reading rooms
- Much more likely to be on their own
- 88% are pre-planned visits
- More likely to have a library card
- More likely to be a Petherick reader

***These 'usage occasions' add context to three core drivers already identified – leisure/entertainment, general learning and study/work***

## 5.5

# Satisfaction

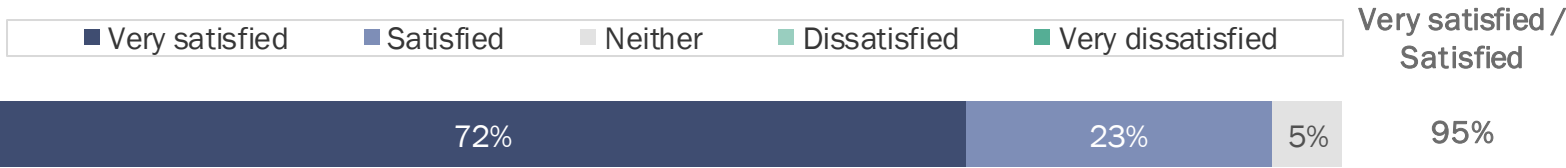
Reflecting the visitor experience matching expectations, visitor satisfaction is very high with almost all satisfied to some degree and 72% very satisfied.

Satisfaction with how **interesting** the experience is scores lower and interest is an area in which first-time visitors score lower than regular visitors.

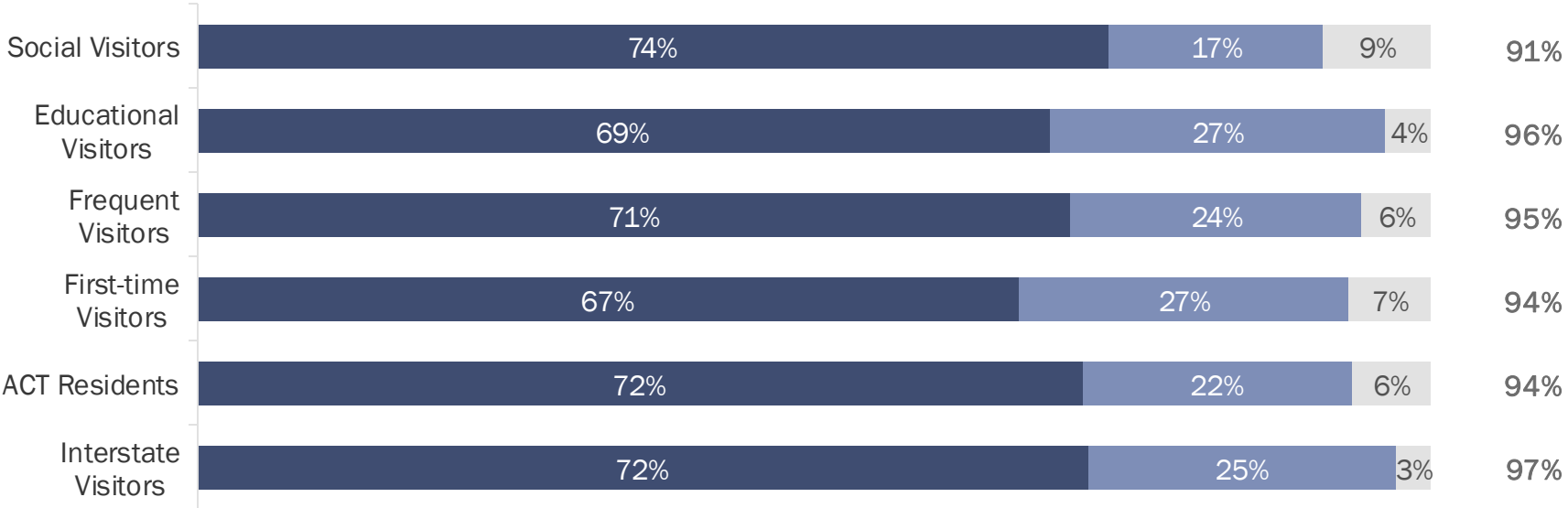
# Satisfaction amongst intercept visitors was very high across all audience types

Satisfaction among on-site visitors is significantly higher than overall satisfaction from the general population audience with more than twice as many saying they are ‘very satisfied’

Same day overall satisfaction – on-site intercepts



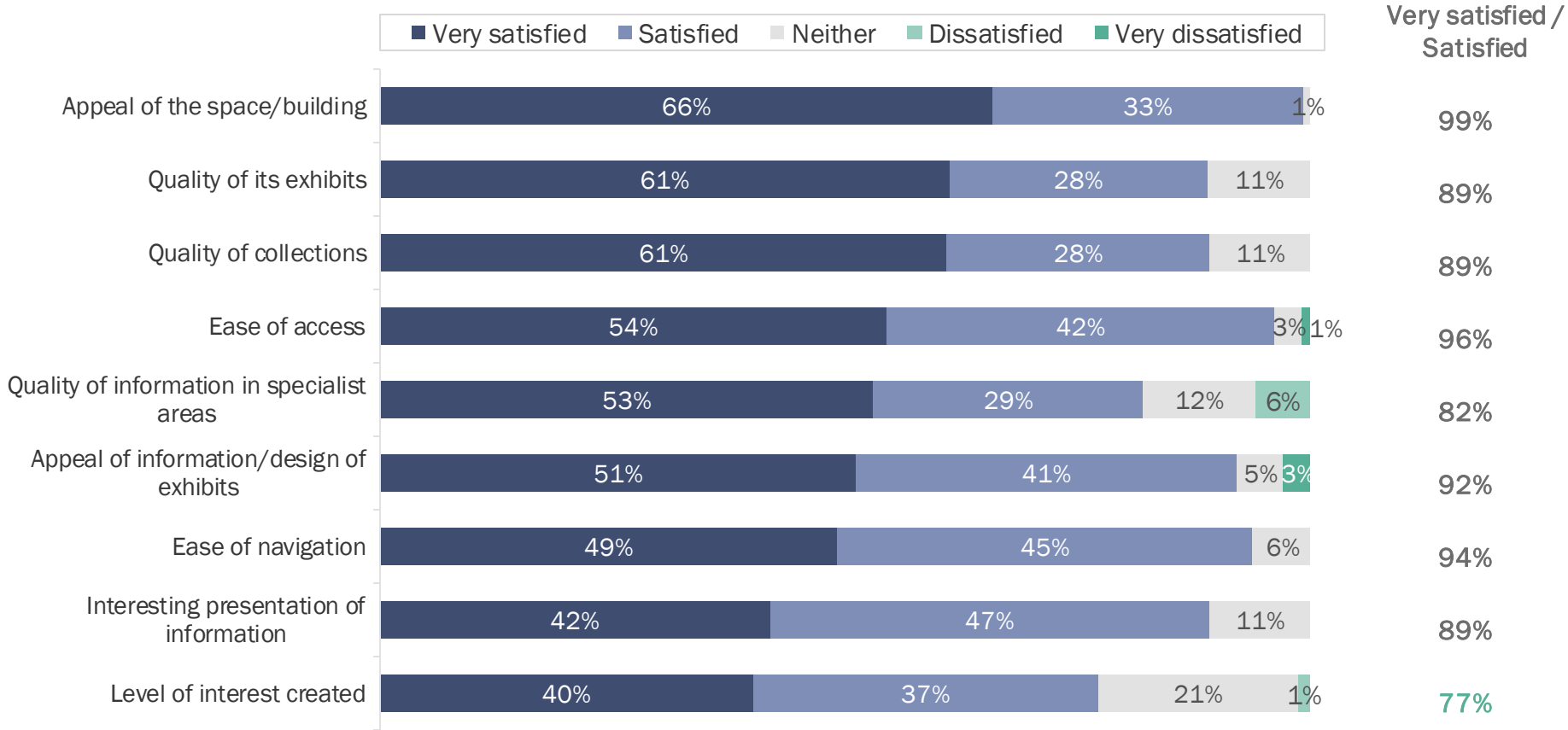
Same day overall satisfaction – on-site intercepts



# Visitors on the day had high levels of satisfaction with the building, the services and the experience, but were less likely to find the information interesting

First time visitors are much less likely to find the presentation of information interesting

Same day satisfaction with services – on-site intercepts

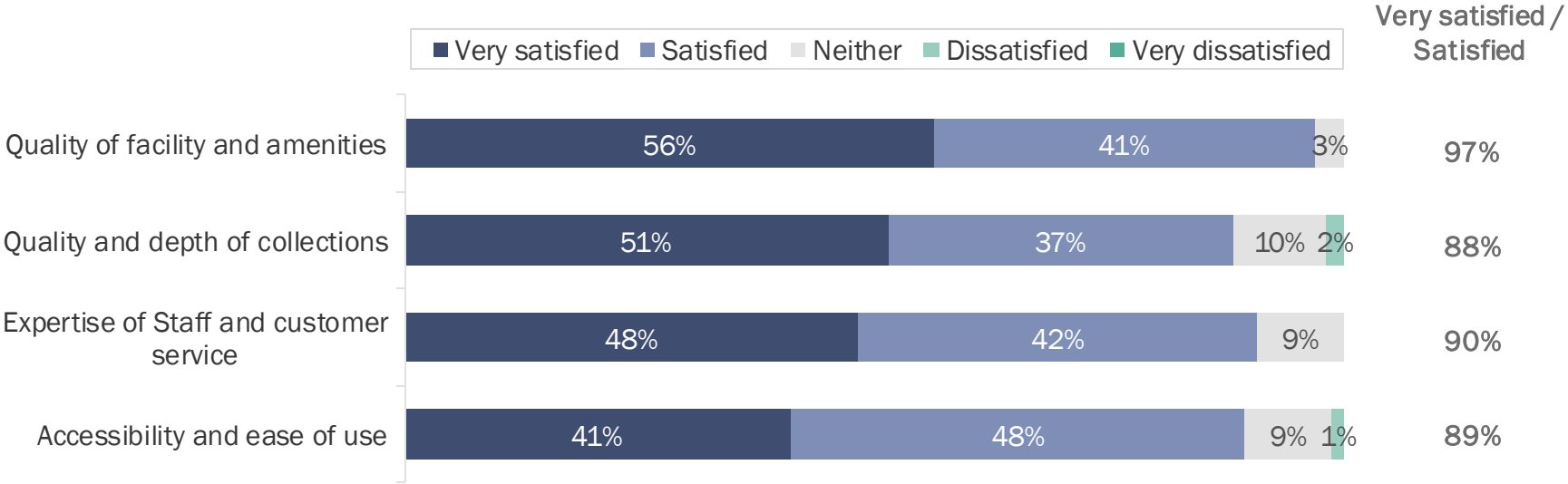


**Translating satisfaction with services to interest amongst first time visitors is an area for consideration (may impact NPS scores)**

# High levels of satisfaction were achieved for key operational elements of the visitor experience

Interstate travellers were more likely than locals to be very satisfied with the collections

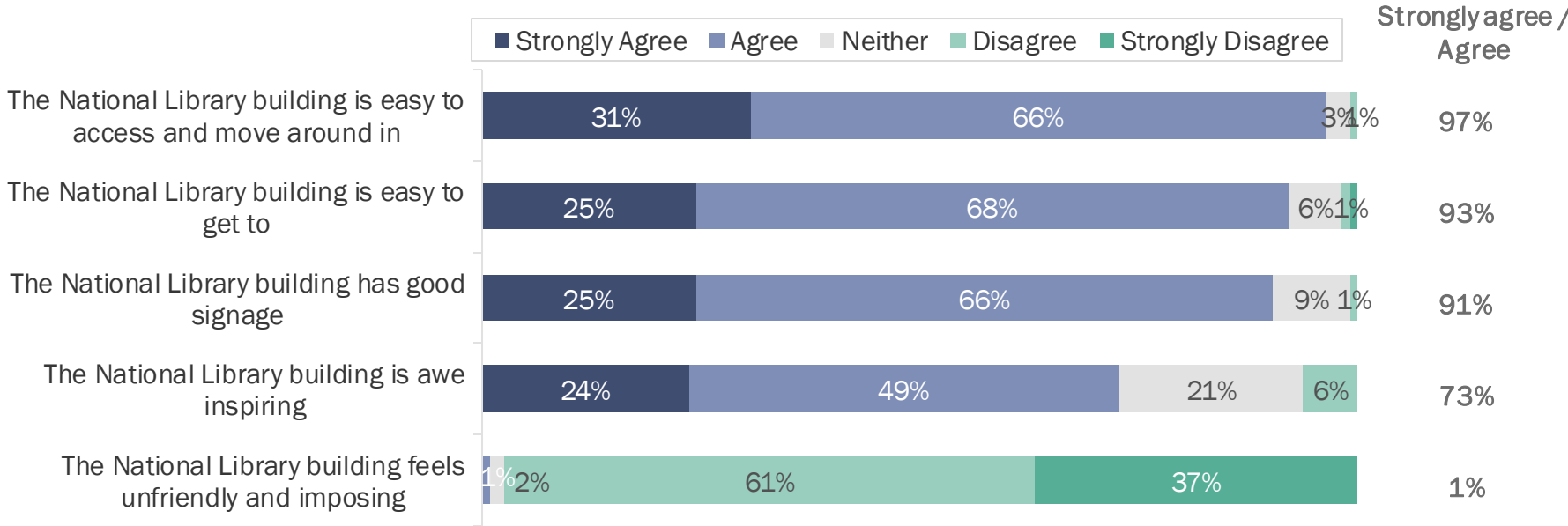
General satisfaction with aspects – on-site intercepts



Note: the above metrics refer to general satisfaction i.e. not necessarily same-day satisfaction, and refers to those who have visited the National Library of Australia at any point, not necessarily on the day of survey

# Overall, visitors are positive about access, signage and the overall appeal of the National Library of Australia building

Visitor attitudes – on-site intercepts



***Is there an opportunity to increase emotional connection to the heritage listed building?***



## Diversity groups



## 6.1

# Aboriginal and Torres Strait Islander Peoples

Cultural heritage and background is highly valued, with community-based channels key sources of cultural engagement and expression.

Whilst GLAM organisations are regarded as having an important role to play, most have experienced barriers to engaging with resources, activities or events, with cost the main issue.

Perceptions of the National Library of Australia are positive but awareness of the resources available is low. Social media, community media and general media (e.g., event listing pages) are the preferred sources for communication from the National Library of Australia.



## Context from stakeholder consultation

- Stakeholders in the sector report a need for continuous change in how Aboriginal and Torres Strait Islander objects of cultural significance are collected, handled, documented and shared.
- There is a need for cultural change, respect for the owners of the objects of cultural significance and the history, the language and how stories are told.
- Some stories and events need to be reclaimed and retold. As well as individuals being allowed to tell their own stories, or allow them to be told by Aboriginal and Torres Strait Islander people or groups authorised to do so. This is a serious and important request.
- Actioning this and moving forward requires Aboriginal and Torres Strait Islander input both within institutions and by institutions.

All of the things that we (Aboriginal and Torres Strait Islander peoples) know about – self-determination, being in charge of your own kind of narrative and all that. But we haven't been in charge of the narrative for so bloody long now...

Do what the Powerhouse has done and get yourself a council of elders or whatever – *Tammi Butterworth, Powerhouse Museum*

Maybe coupling up a bit with your education department... getting some Indigenous initiatives happening to just kind of remind them of, “Hey, this is your library too... your stories deserve to be in there just as much” – *Tammi Butterworth, Powerhouse Museum*

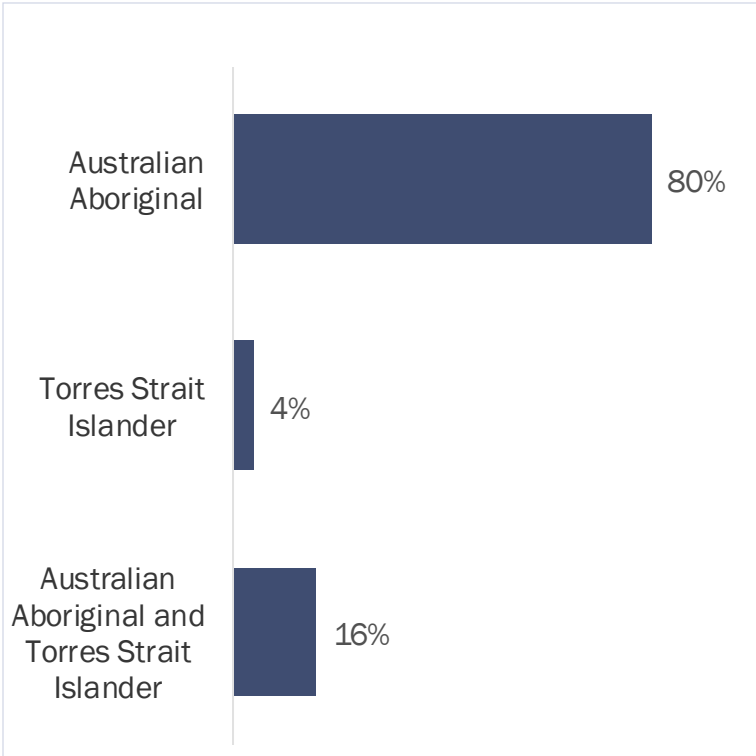
Having Aboriginal and Torres Strait Islander people handling the objects, the information, the provenance and the significance, and the documenting of that – *Jeremy Ambrum, Museum of Applied Arts & Sciences*

### Stakeholders advised that:

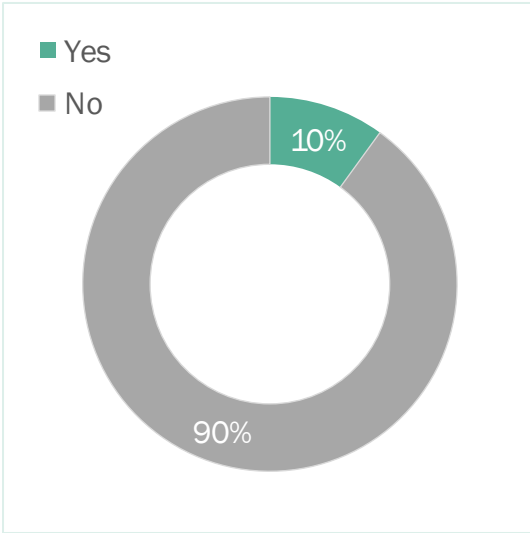
- ✓ It is important that NLA has a dedicated team with proven expertise
- ✓ This has been started by the appointment of an experienced staff member
- ✓ There is further work to be done
- ✓ Engagement needs to be taken out to the communities
- ✓ Education in schools is vital and part of building trust

# Most survey respondents identified as Australian Aboriginal and 1 in 10 speak a language related to their cultural background

Heritage

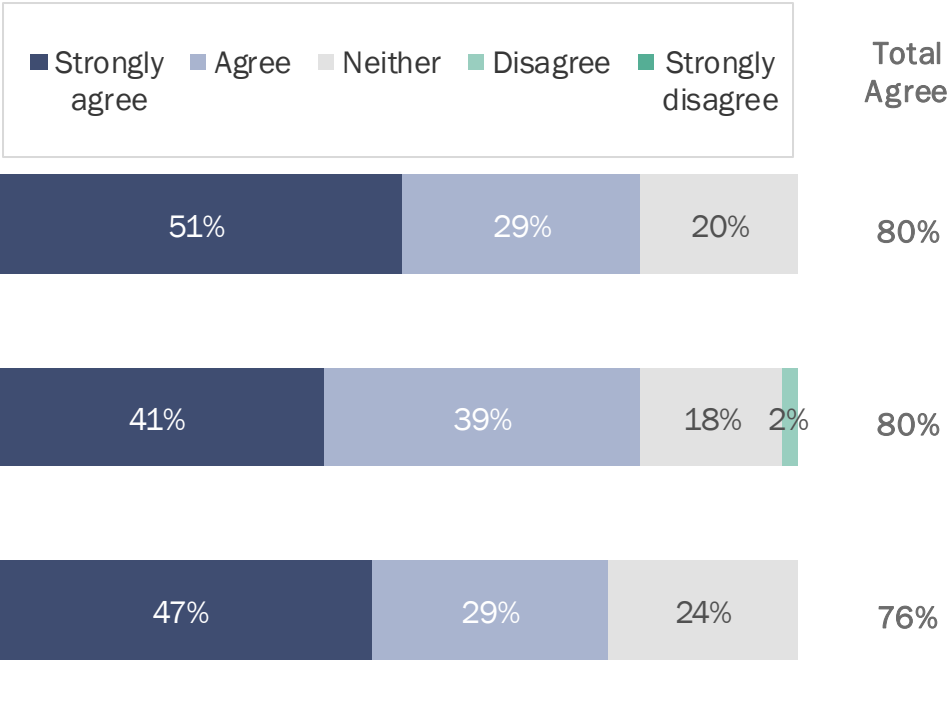


Language related to cultural background spoken



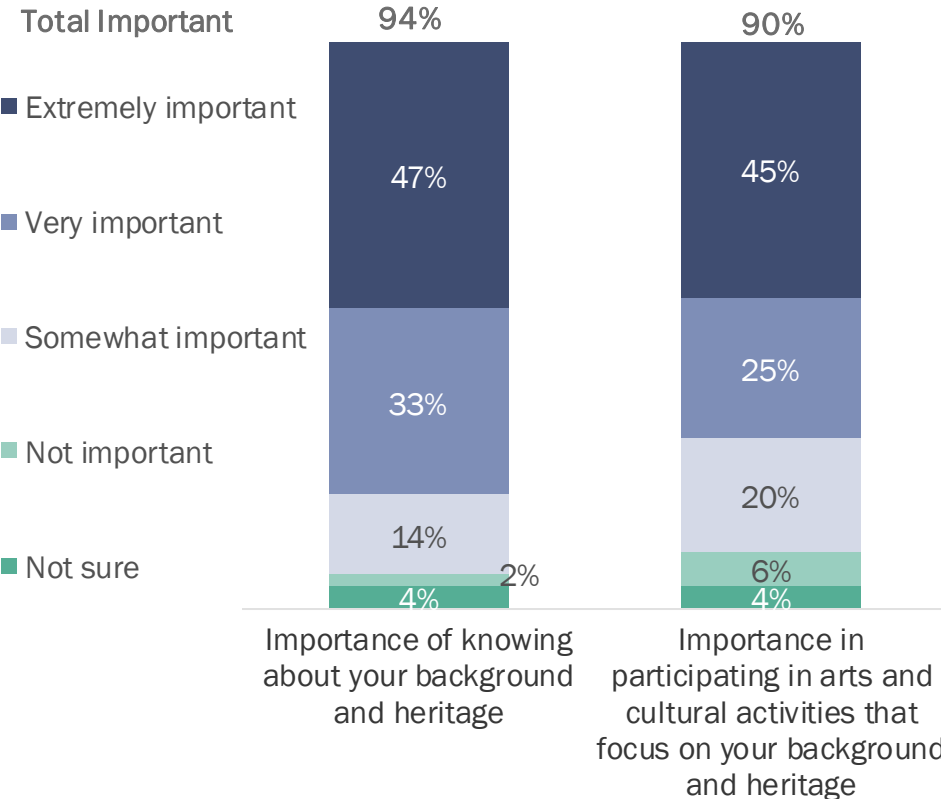
# There is a strong connection to and interest in learning about their own cultural heritage

Impact of Aboriginal and Torres Strait Islander culture



# Arts and cultural activities are highly valued as they enable participants to understand and connect with their cultural background

Importance of heritage and participation in cultural activities



Reasons why it is important – those who thought either statement was important

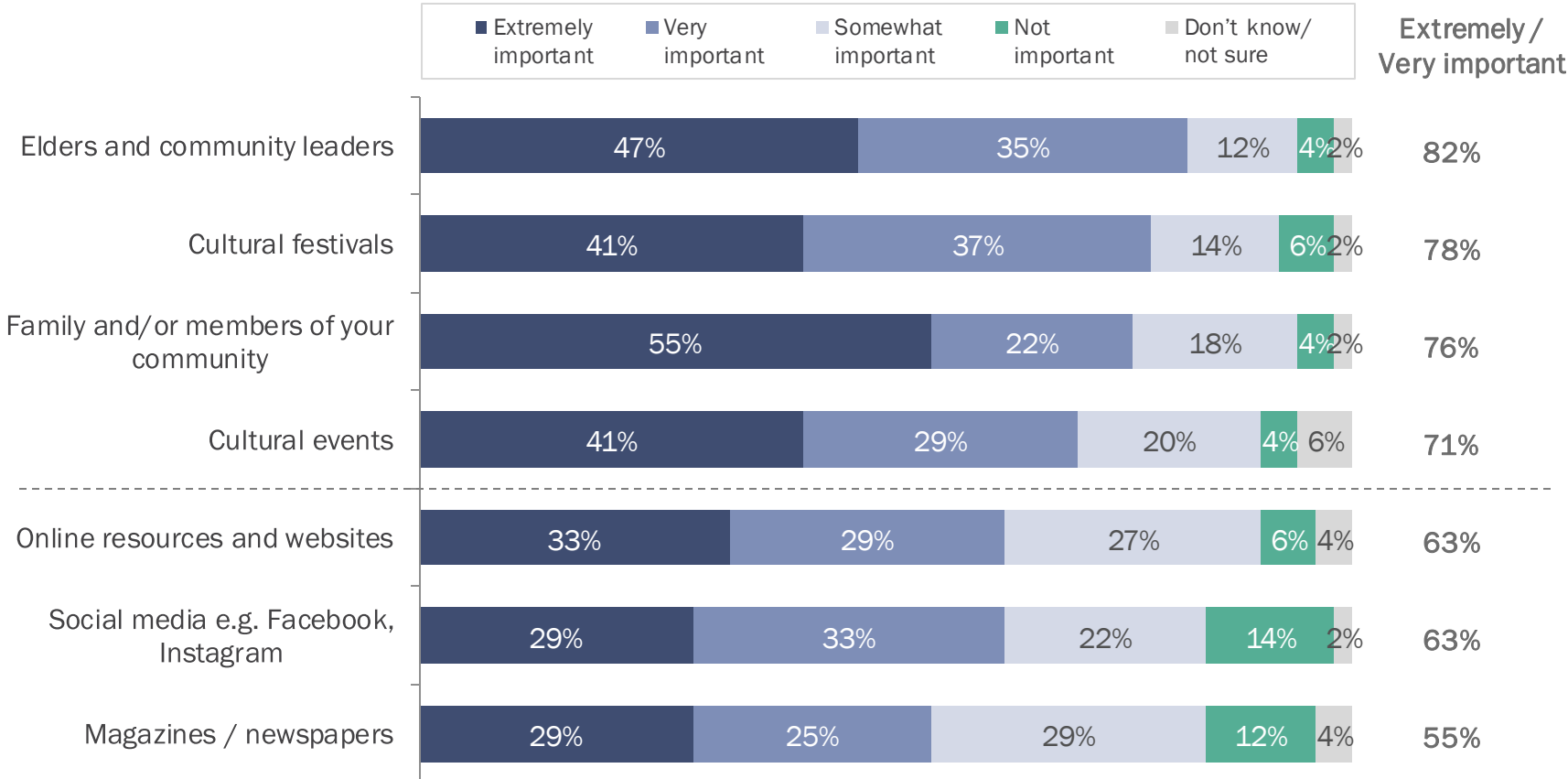
- To feel connected to my heritage **56%**
- So my children can learn about and connect with their cultural background **52%**
- To socialise with my community **48%**
- To improve my health and wellbeing **42%**
- To assist in preserving the practices of my cultures, histories and knowledge **40%**
- To feel community support because I am living away from my home Country **29%**

Q3. How important is it to you to know about your Australian Aboriginal and/or Torres Strait Islander background and heritage? // Q4. How important is it to you to participate in cultural activities that focus on your Australian Aboriginal and/or Torres Strait Islander background and heritage? Base: Follow-up Aboriginal and Torres Strait Islander Survey (n=51) // Q5. Why is it important to you to learn about your Australian Aboriginal and/or Torres Strait Islander background and engage and/or participate in cultural practices and events? \*Filtered to those who find it important at Q3/Q4 (n=48)

# Survey respondents use a wide range of channels to connect with their culture already, but mini groups with stakeholders reveal that more mainstream channels need to get involved

## Community-based connections in particular are extremely important

Importance of different ways of engaging with or expressing culture



# Three quarters believe that GLAM institutions have an important role to play in sharing First Nations cultures, more so than both social and traditional media

Attitudes towards the role of different organisations in sharing Aboriginal and Torres Strait Islander cultures



Total Agree

Australian libraries play a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



76%

Australian museums and art galleries play a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



75%

Australian television channels play a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



73%

Websites from state or national libraries play a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



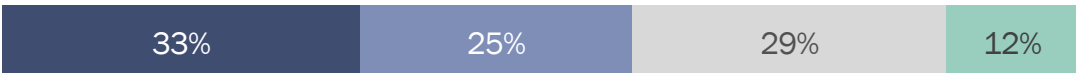
71%

Social media plays a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



61%

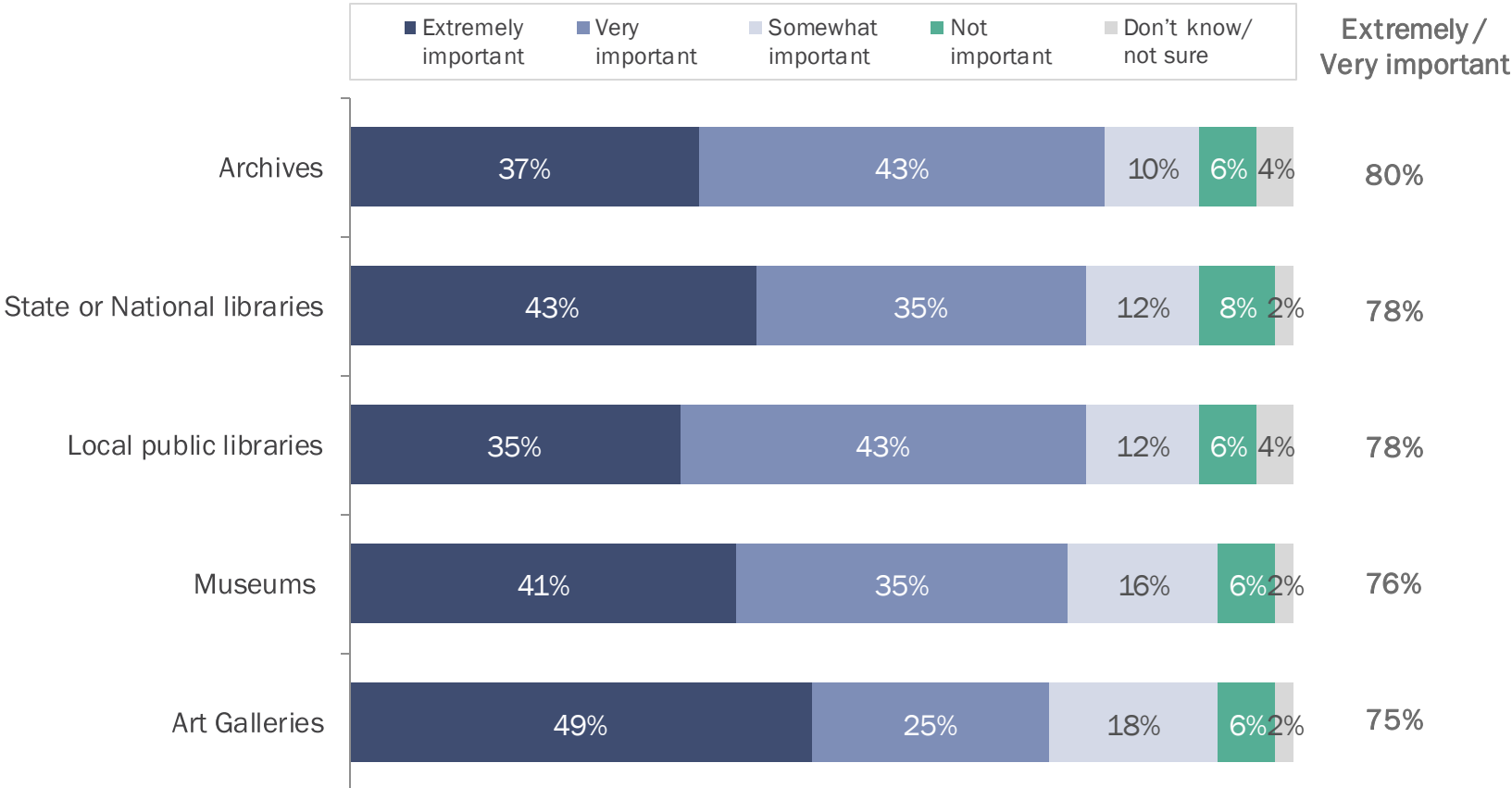
Newspapers and magazines play a key role in sharing Australian Aboriginal and Torres Strait Islander cultures



59%

# GLAM institutions are highly valued as sources of cultural information, with at least three quarters rating each institution as extremely/very important

*Importance of GLAM organisations in providing opportunities to connect with cultural background*



# Respondents were asked to name GLAM organisations that do an excellent job at engaging with/expressing Aboriginal and Torres Strait Islander culture

City Gallery

The QLD state museum and library

State Library of NSW

National Gallery of Victoria (NGV)

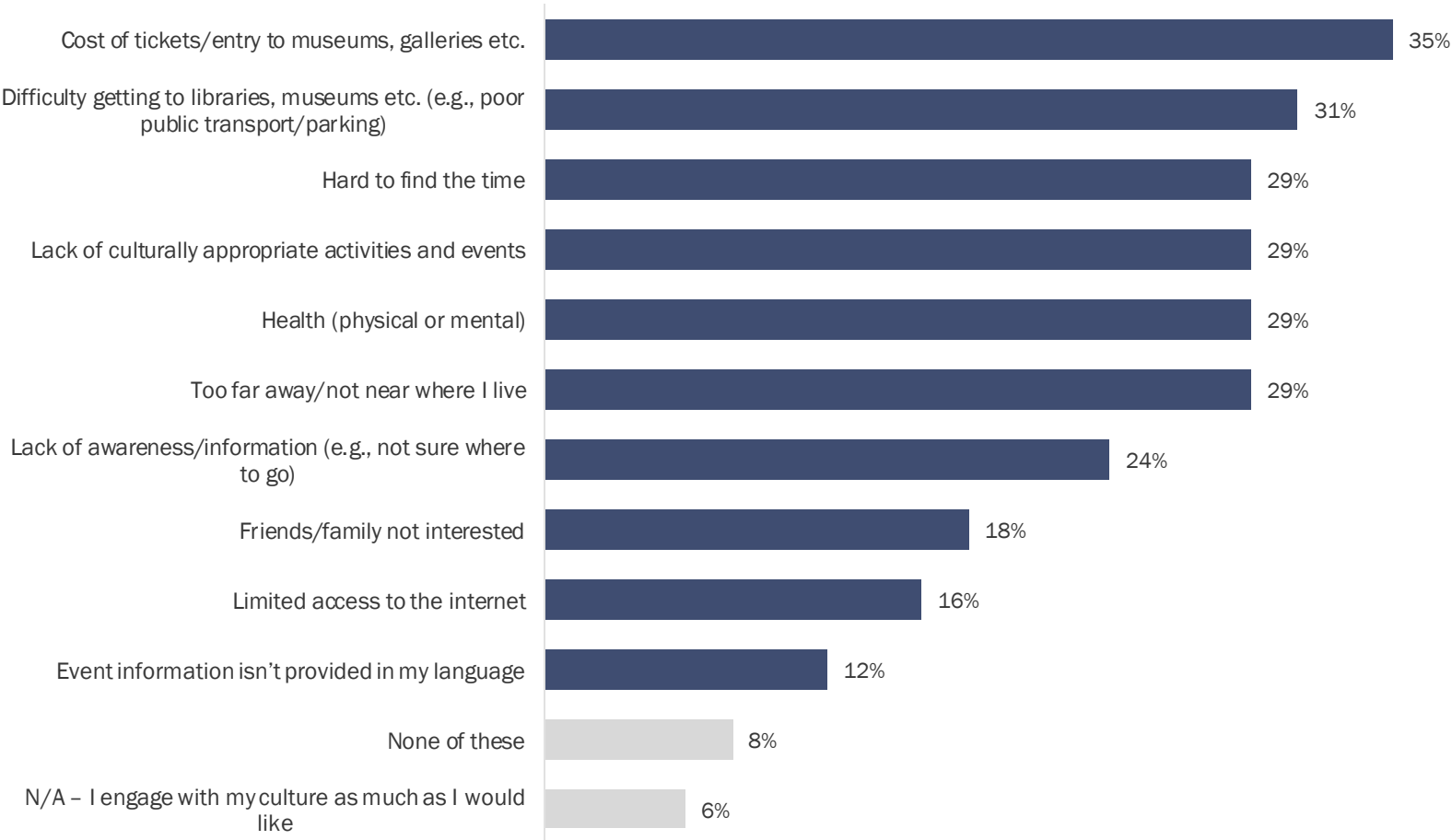
National Library of Australia

Non-specific mentions include museums (9%), art galleries (6%) and libraries (3%).



# The majority of the sample (94%) had experienced one or more barriers to engaging with the GLAM sector, with cost being the main issue

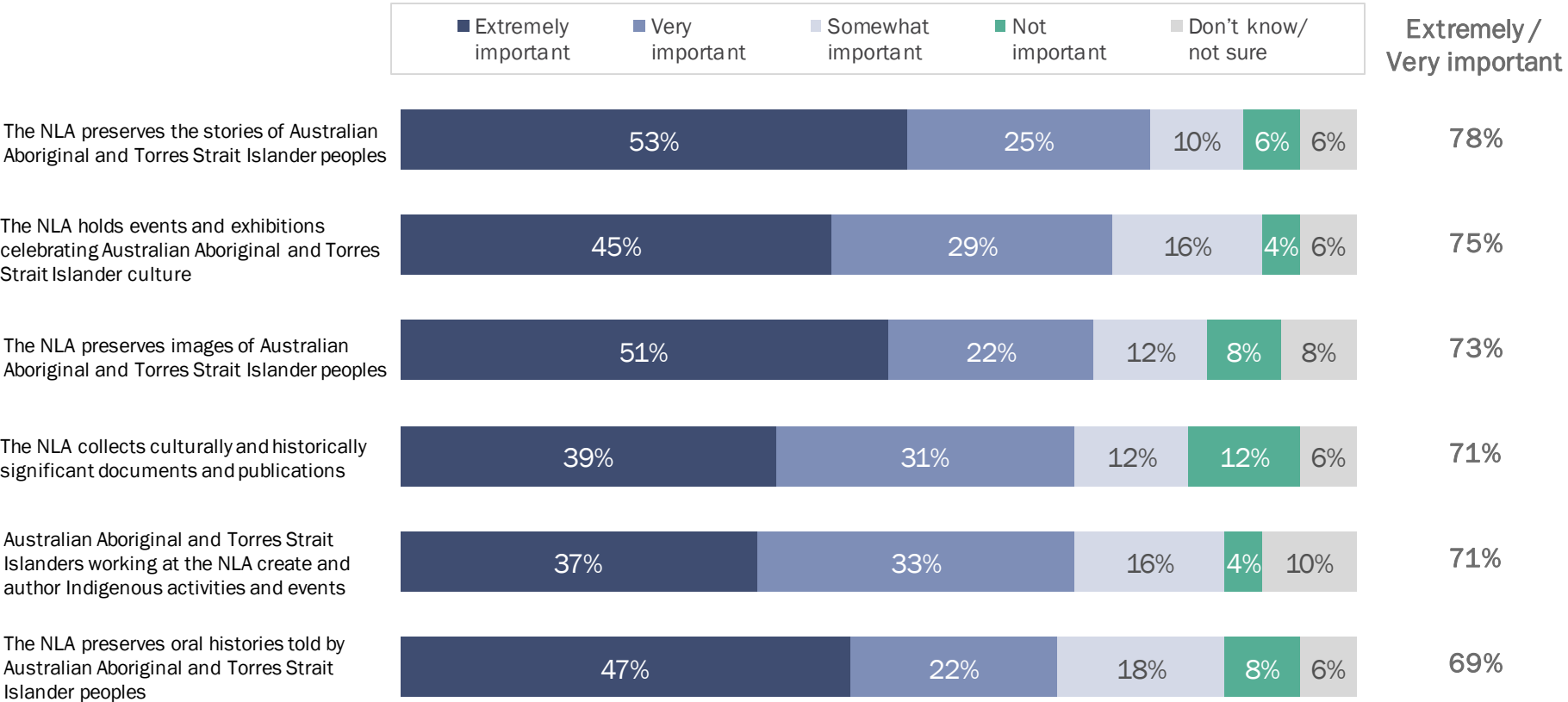
Barriers to engaging with GLAM organisation's research activities or events



# All the National Library of Australia’s activities are perceived positively with at least two thirds rating each one as extremely/very important – stories are particularly interesting

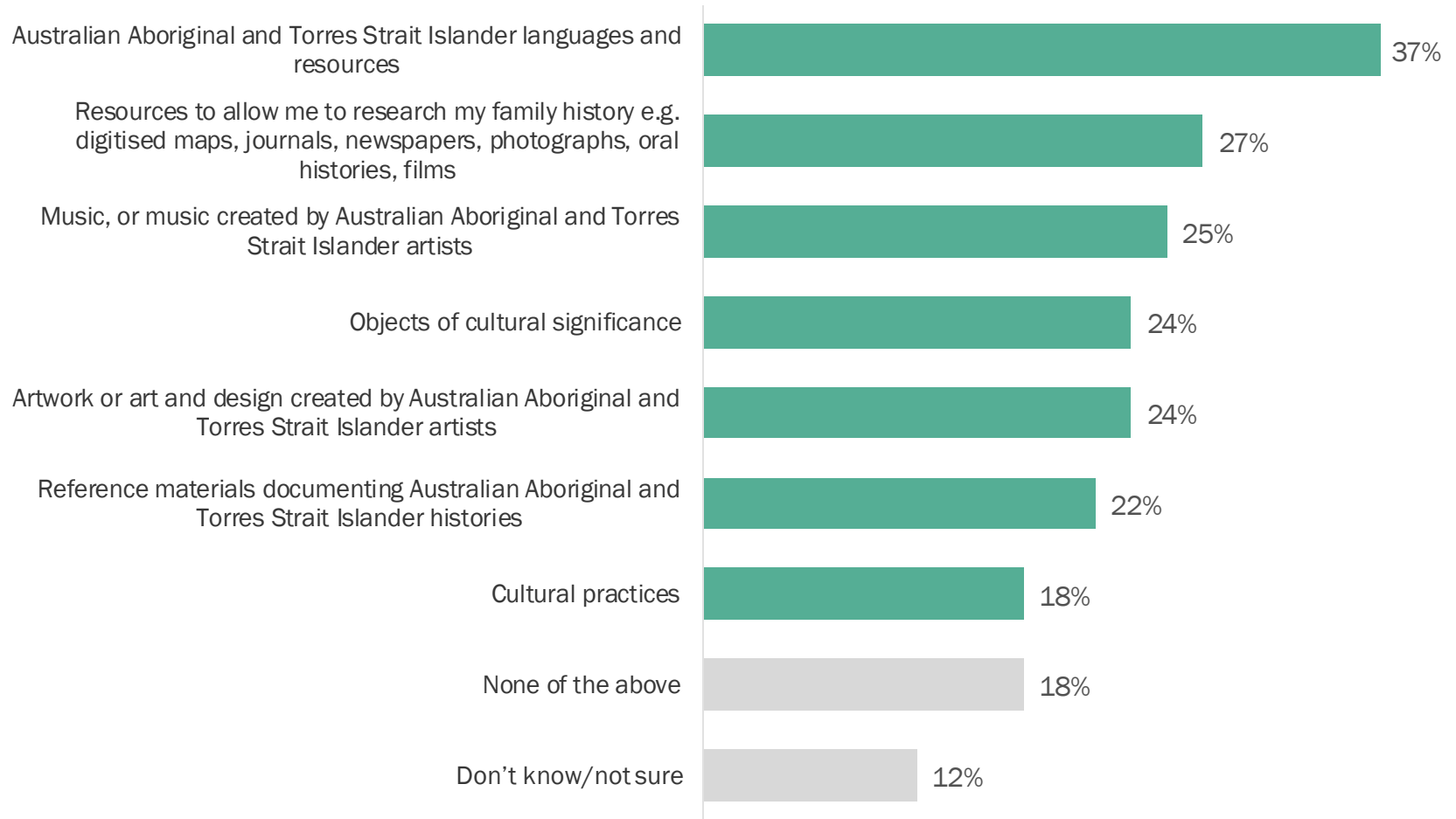
## Preservation of stories and images is particularly relevant with over half rating this as extremely important

Important activities for the National Library of Australia



# Most respondents were not aware of the range of cultural resources provided by the National Library of Australia

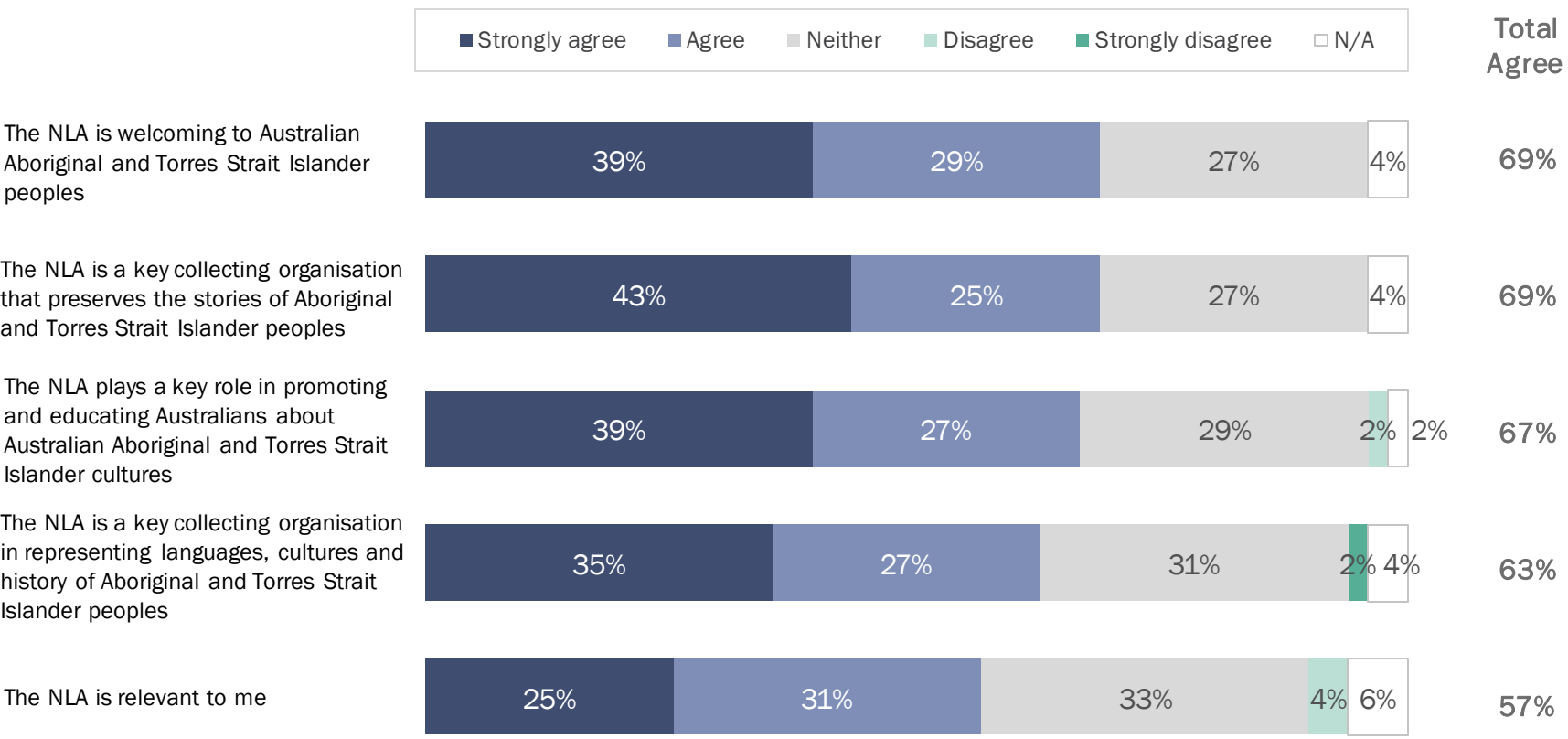
Awareness of The National Library of Australia's resources



# Overall, attitudes to the National Library of Australia are positive with low, if any, disagreement with core statements

However, the high proportion responding with 'neither agree nor disagree' shows there is an opportunity to increase engagement and strength of agreement

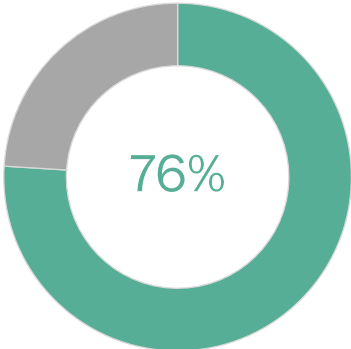
Attitudes to The National Library of Australia



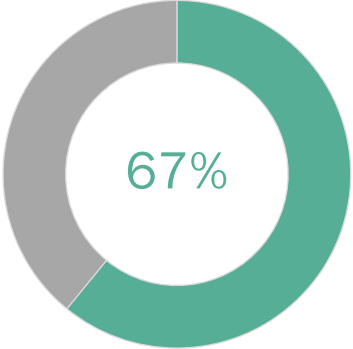
# There is considerable interest in the collections and activities with almost 70% or more of the sample interested in visiting the National Library of Australia after seeing offers

## Interest in The National Library of Australia offerings

**Aboriginal and Torres Strait Islander collections**  
a vast collection of materials documenting and recording histories, experiences and cultures.

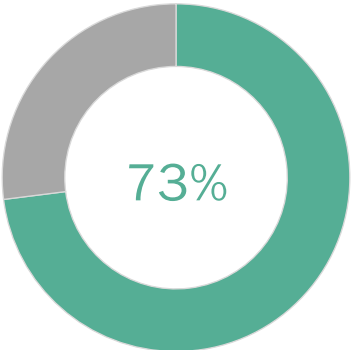


**Activities**  
Celebrating different aspects of Australian Aboriginal and Torres Strait Islander culture, history, spirituality and art

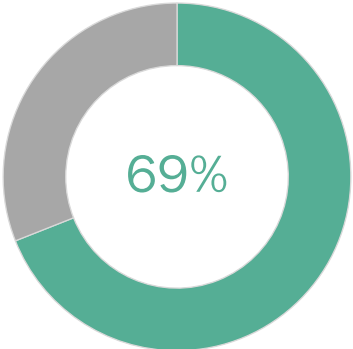


-----  
*Interest having seen some of The National Library of Australia's offerings*  
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**Visiting the library**



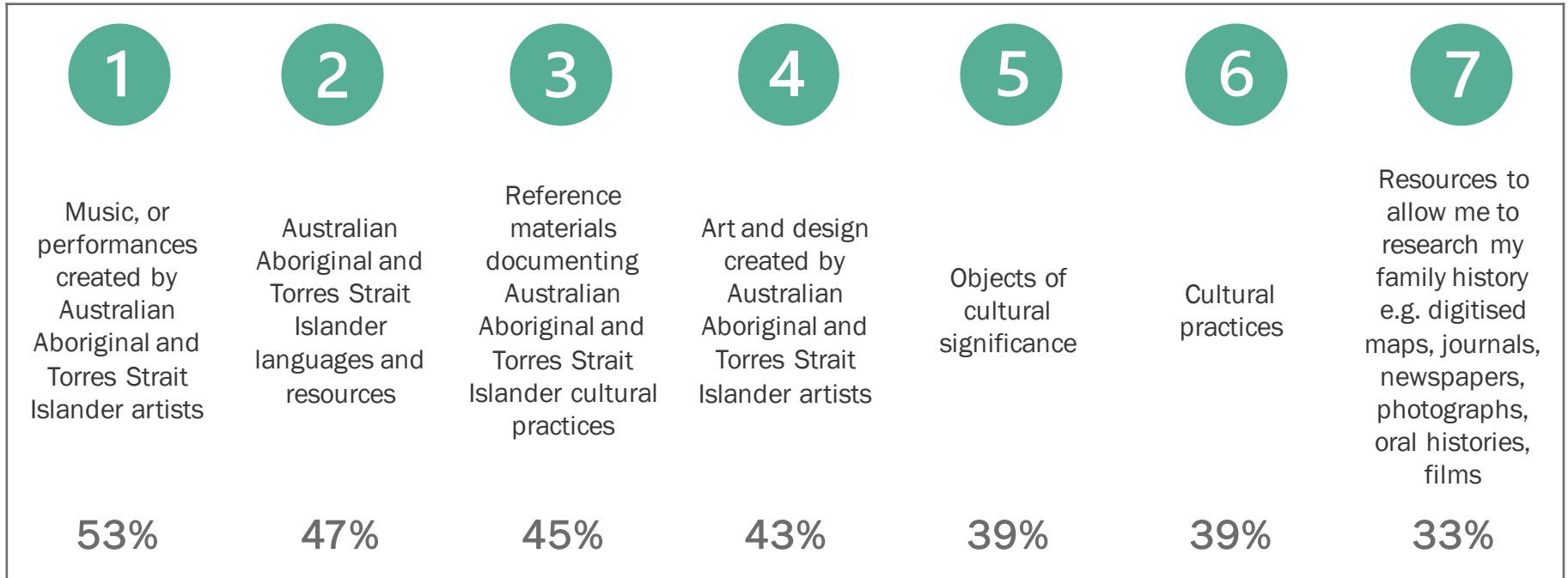
**Accessing online**



Q16. Interest in Australian Aboriginal & Torres Strait Islander collections // Q17. Interest in Activities // Q18. Now that you have seen some of the National Library of Australia's offerings, how interested would you be in visiting the library? // Q19. Having seen some of their offerings, how interested would you be in accessing and browsing these materials online? Base: Follow-up Aboriginal and Torres Strait Islander Survey (n=51)

# Music and performances are of most interest, appealing to approximately half of respondents

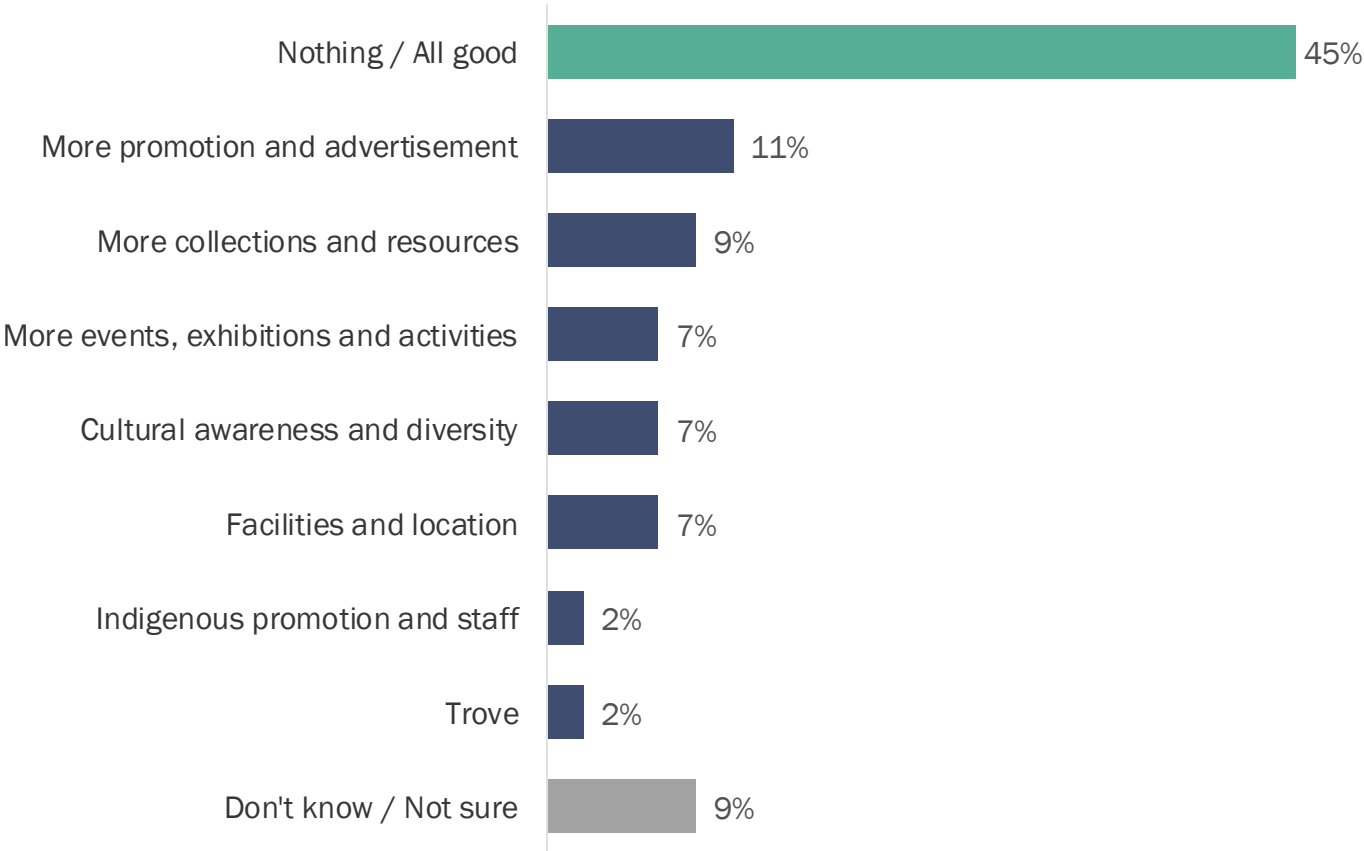
Areas interested in engaging with or learning about



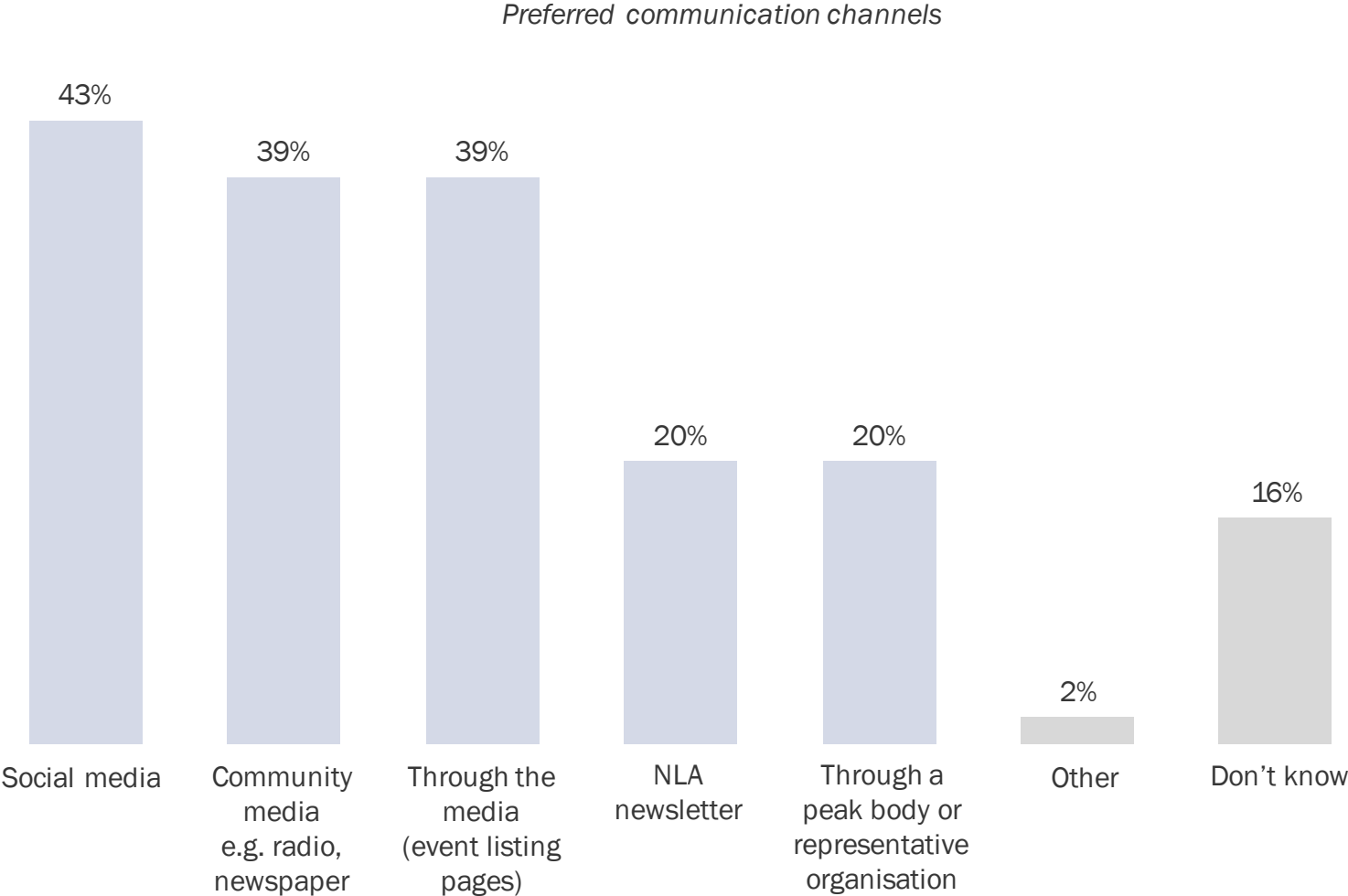
# Almost half (46%) provided a suggestion for how the National Library of Australia could better engage Aboriginal and Torres Strait Islander peoples

A range of ideas were given, with increased marketing a key takeaway

*Improving the appeal of The National Library of Australia*



# Social media is the preferred communication source, followed by traditional media





## 6.2

# Culturally and Linguistically Diverse Australians

Cultural heritage and background is highly valued, with cultural festivals and online channels key sources of cultural engagement and expression.

Whilst GLAM organisations are regarded as having a role to play, most have experienced barriers to engaging with the sector to explore their cultural heritage, with a lack of awareness the main issue.

Perceptions of the National Library of Australia are positive but there is a need for increased advertising and promotion to culturally diverse communities, with social media by far the preferred source of communication.

## Context from stakeholder consultation

- Communities often connect to their heritage through socialisation and local events.
- Community groups, typically established for all communities are typically active in preserving language through publications, and providing some connection to cultural histories through exhibits and collections.
- This is often in the absence of formal institutions, particularly for cultures with smaller populations and a new history in Australia.
- Oral History is very important and sometimes the most accessible and accurate way to capture particular community groups.
- CALD communities would appreciate more formal representation of their cultural groups and histories in Australian institutions.

The idea that National Libraries would hold books in-language is very important... and also this idea of family genealogy and history, and being able to unpick those kinds of histories is really important to communities – *CALD Mini-Group*

We need to create some kind of program, where we address particularly, CALD communities and also where we address newly emerging communities. Again, because their necessities are different than [those] who are already established here –  
*CALD Mini-Group*

Traditionally a lot of information sharing takes place, orally... I suppose one of the most effective ways for museums and libraries etc. to engage with Pacific communities is to have live events, activities, in-demonstrations, those kinds of things.

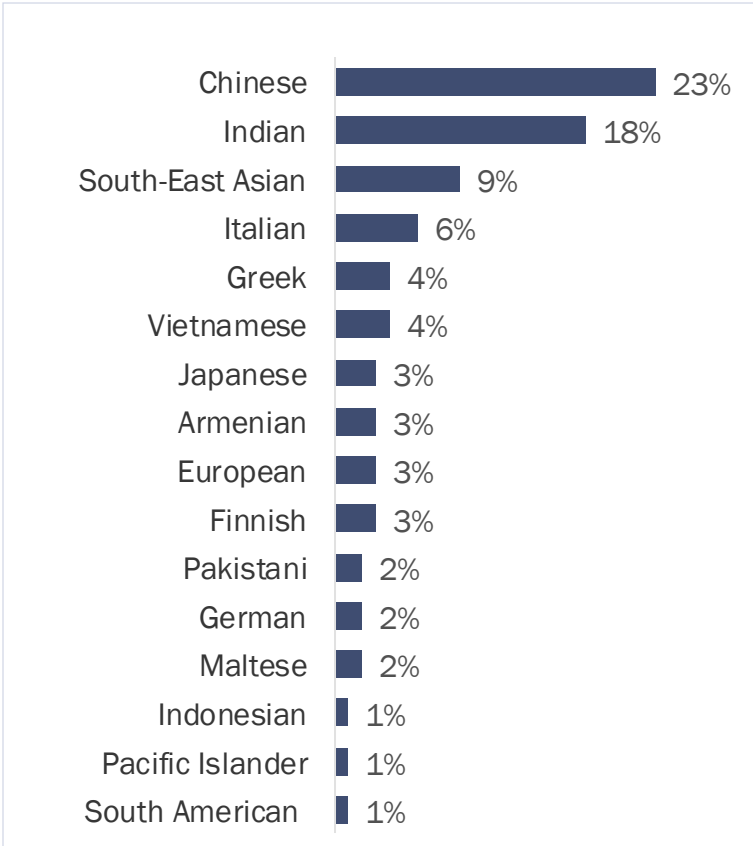
I think museums and libraries do tend to connect quite well with Pacific communities, but it does have to be even-based  
– *CALD Mini-Group*

### Stakeholders advised that:

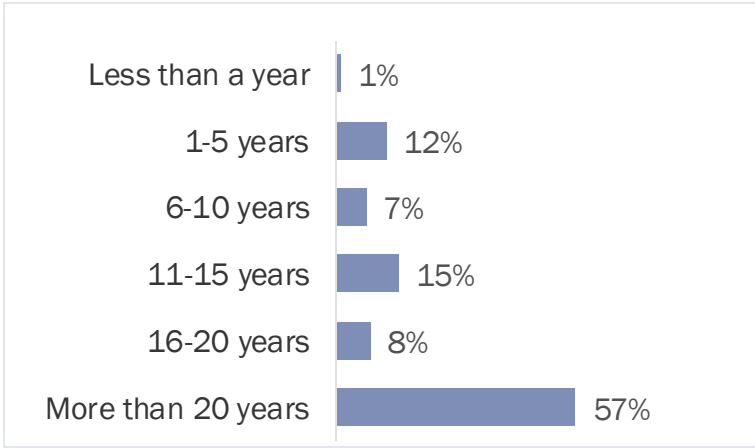
- ✓ There is a need to provide easily accessible content so people can engage with or explore their heritage
- ✓ Ideally the NLA should look to connect with existing local cultural organisations (e.g. local libraries, places of worships)
- ✓ Host community events and activities to give an opportunity for socialisation

# Most respondents are fluent in English and a large proportion have been living in Australia for more than 20 years

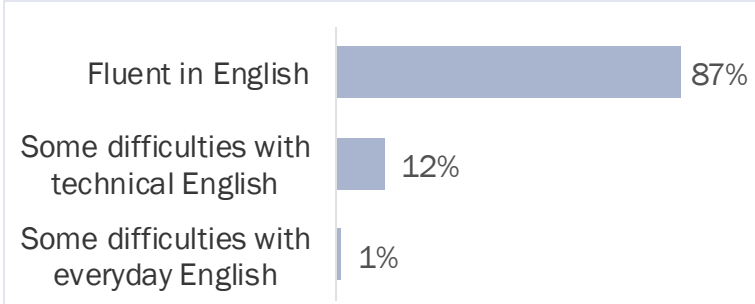
*Heritage (responses given by 1% or more shown)*



*Length of time lived in Australia*

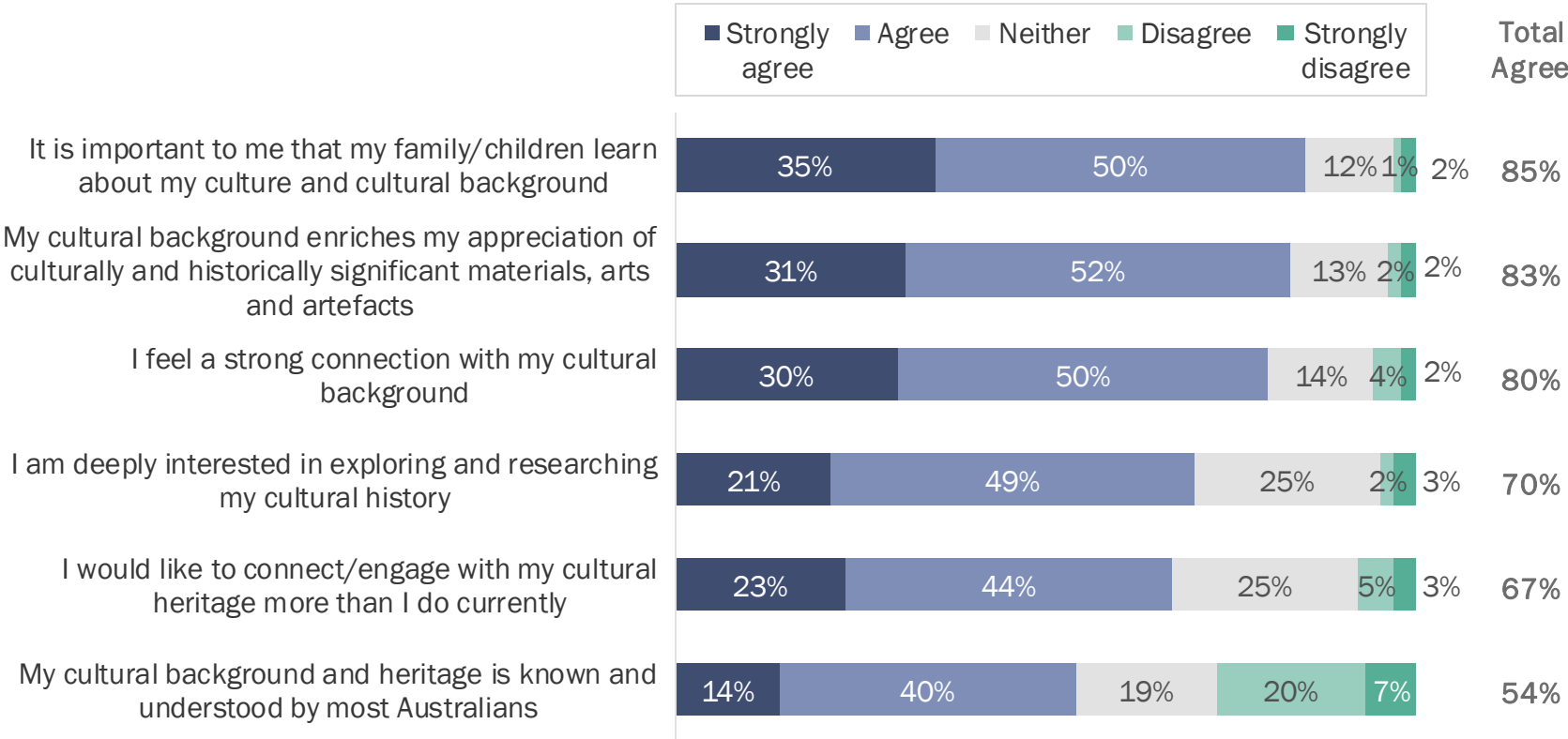


*English ability*



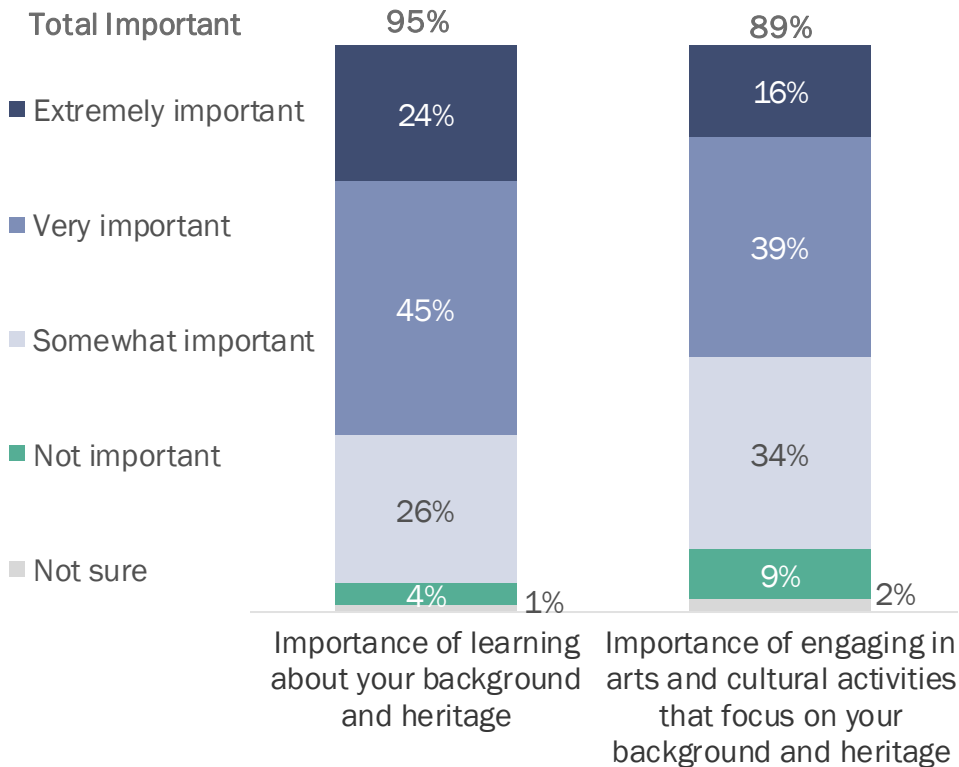
# Respondents have a strong connection to, and interest in, learning about their cultural heritage

Impact of cultural background



# Arts and cultural activities are highly valued as they enable participants to understand and connect with their cultural background

Importance of heritage and participation in cultural activities



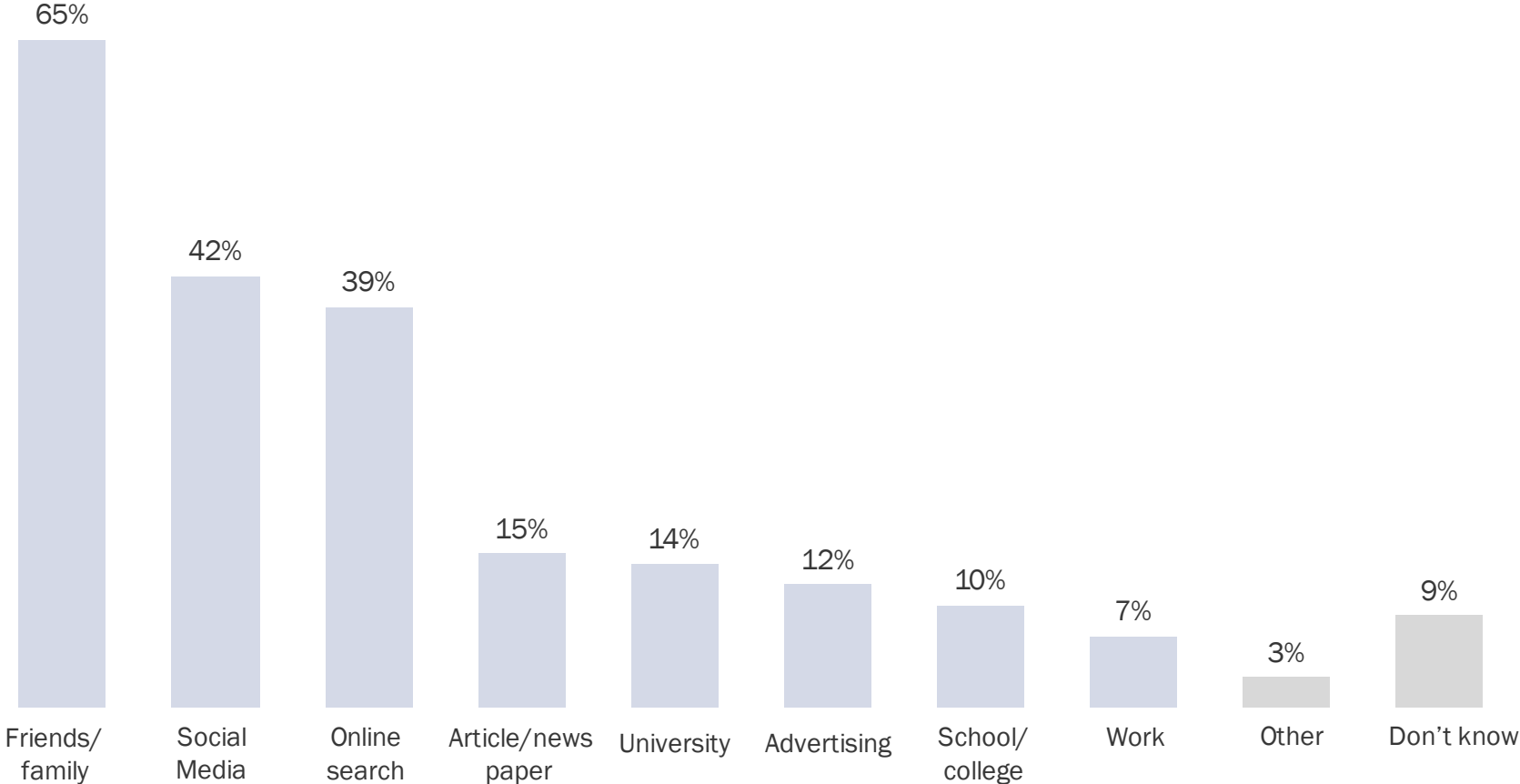
Reasons why it is important – those who thought either statement was important

- To feel connected to my heritage **69%**
- So my children can learn about and connect with their cultural background **51%**
- For family history **50%**
- To assist in preserving the practices of my culture **47%**
- For enjoyment and leisure **42%**
- To socialise with my community **38%**
- To feel community support because I am living away from my home country **34%**
- To improve my health and wellbeing **25%**

Q2. How important is it to you to learn about your cultural background and heritage? // Q3. How important is it to you to engage in arts and cultural activities that focus on your cultural background and heritage? Base: Follow-up CALD Survey (n=100) // Q4. Why is it important to you to learn about your cultural background and/or engage in cultural events? \*Filtered to those who find it important at Q3/Q4 (n=96)

# Word of mouth is the most common way of finding out about cultural activities and events

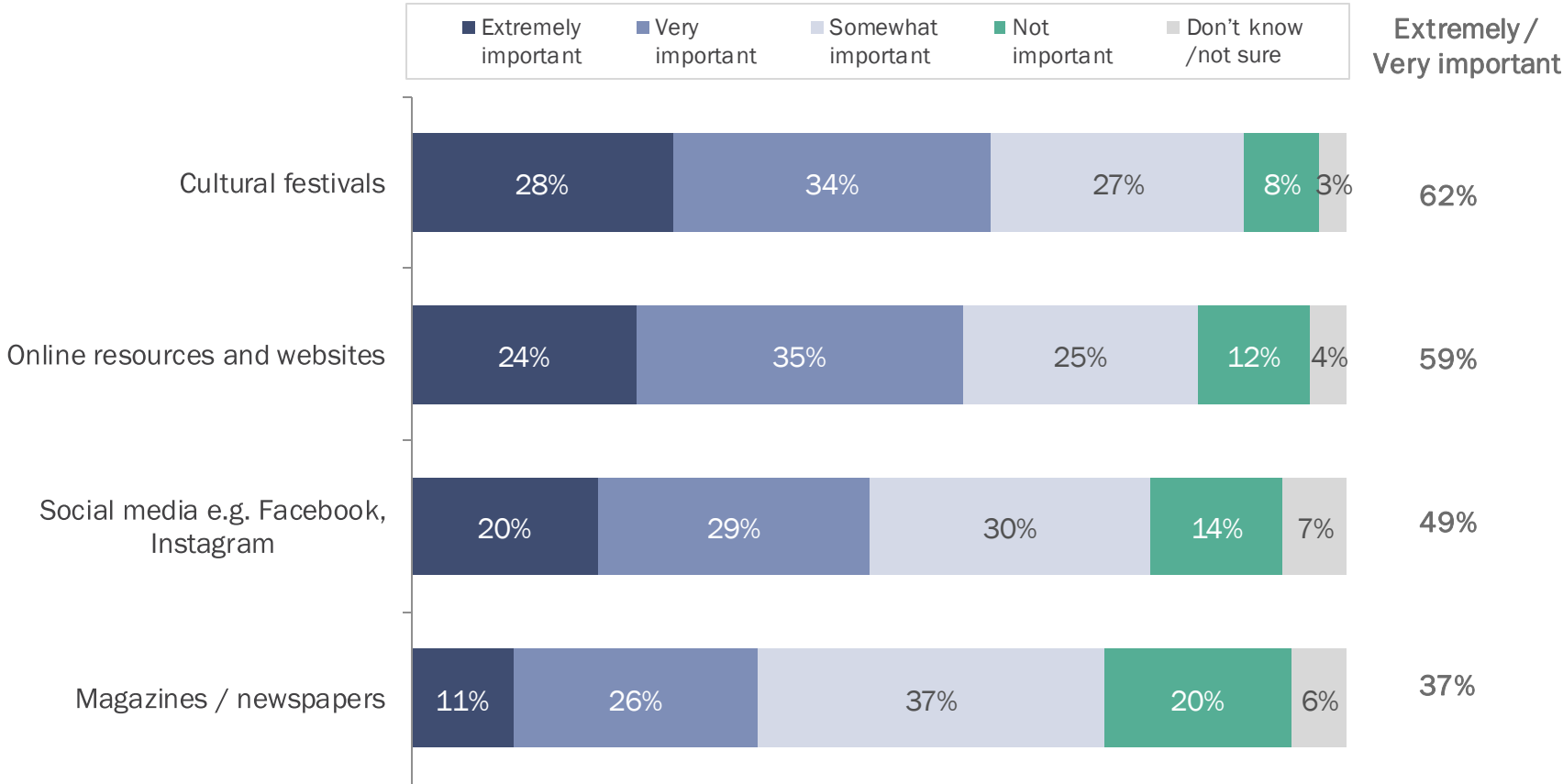
Ways of being notified of cultural events



# Respondents use a range of channels to engage with their culture, with cultural festivals the most important

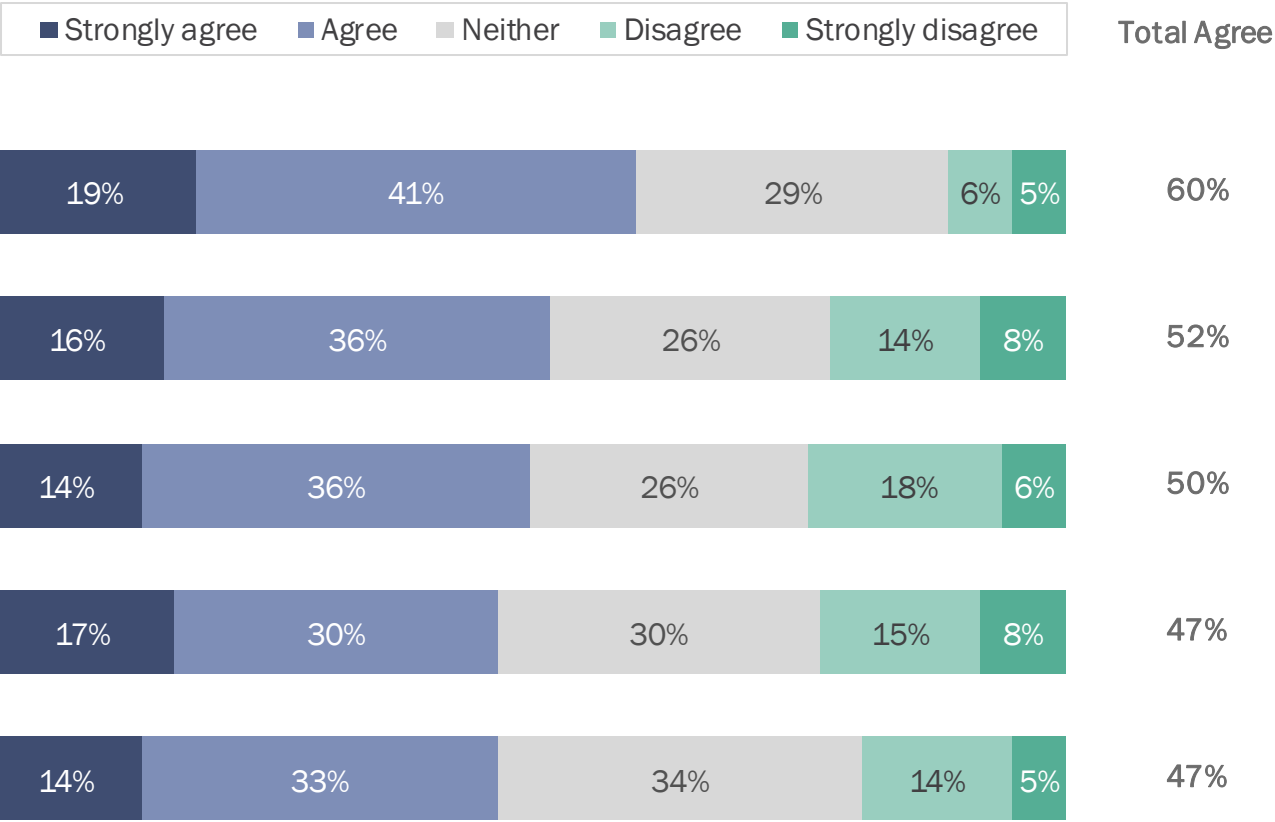
Online resources and websites are also key sources of cultural connection and expression

Importance of different ways of engaging with or expressing culture



# Social media is a key source of cultural content and coverage, more so than GLAM organisations and traditional media

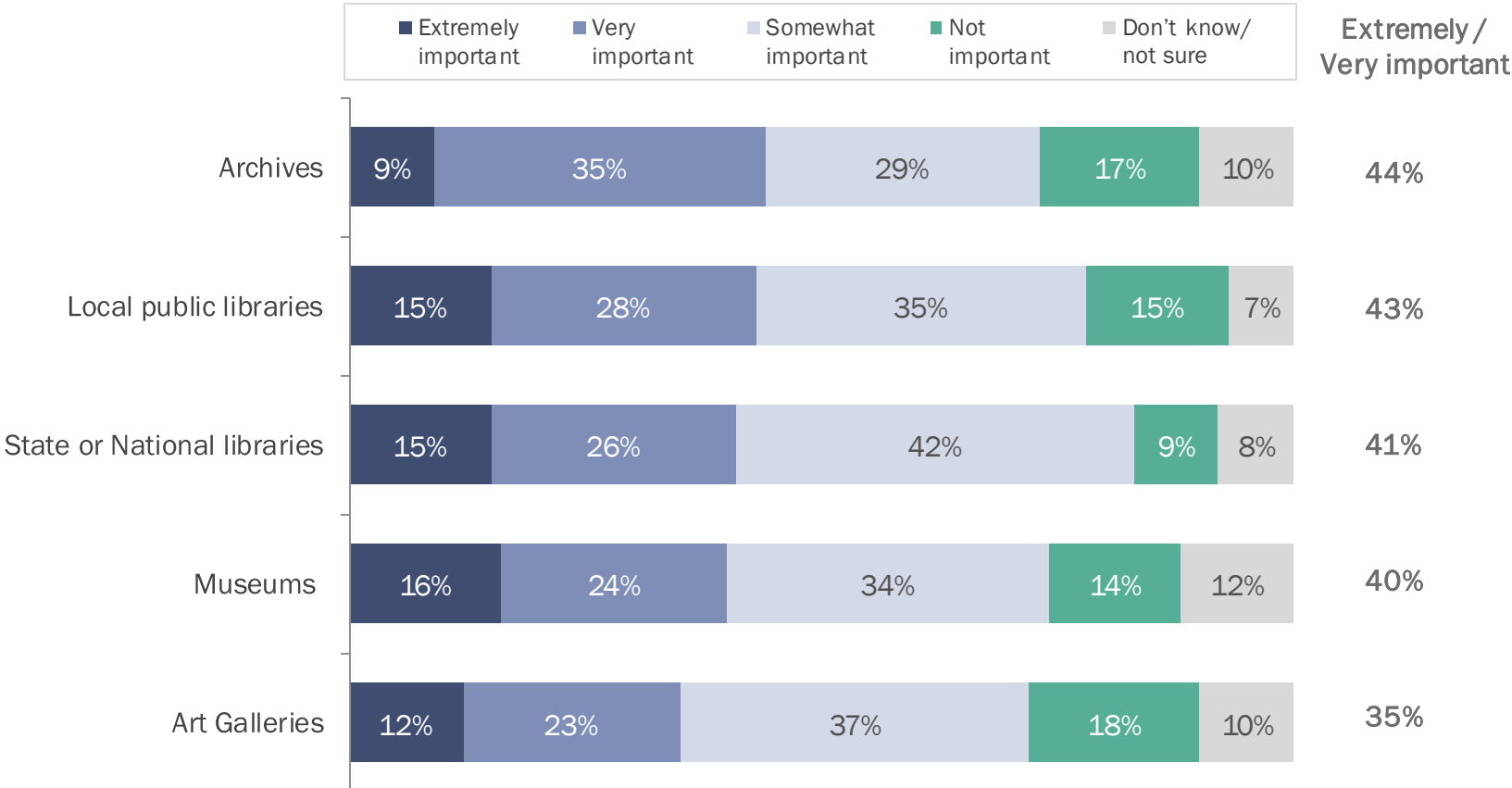
Attitudes towards the role of different organisations in representing cultural backgrounds and language groups





# GLAM organisations do have a role to play in providing opportunities for cultural engagement with at least a third rating each one as extremely/very important

*Importance of GLAM organisations in providing opportunities to connect with cultural background*



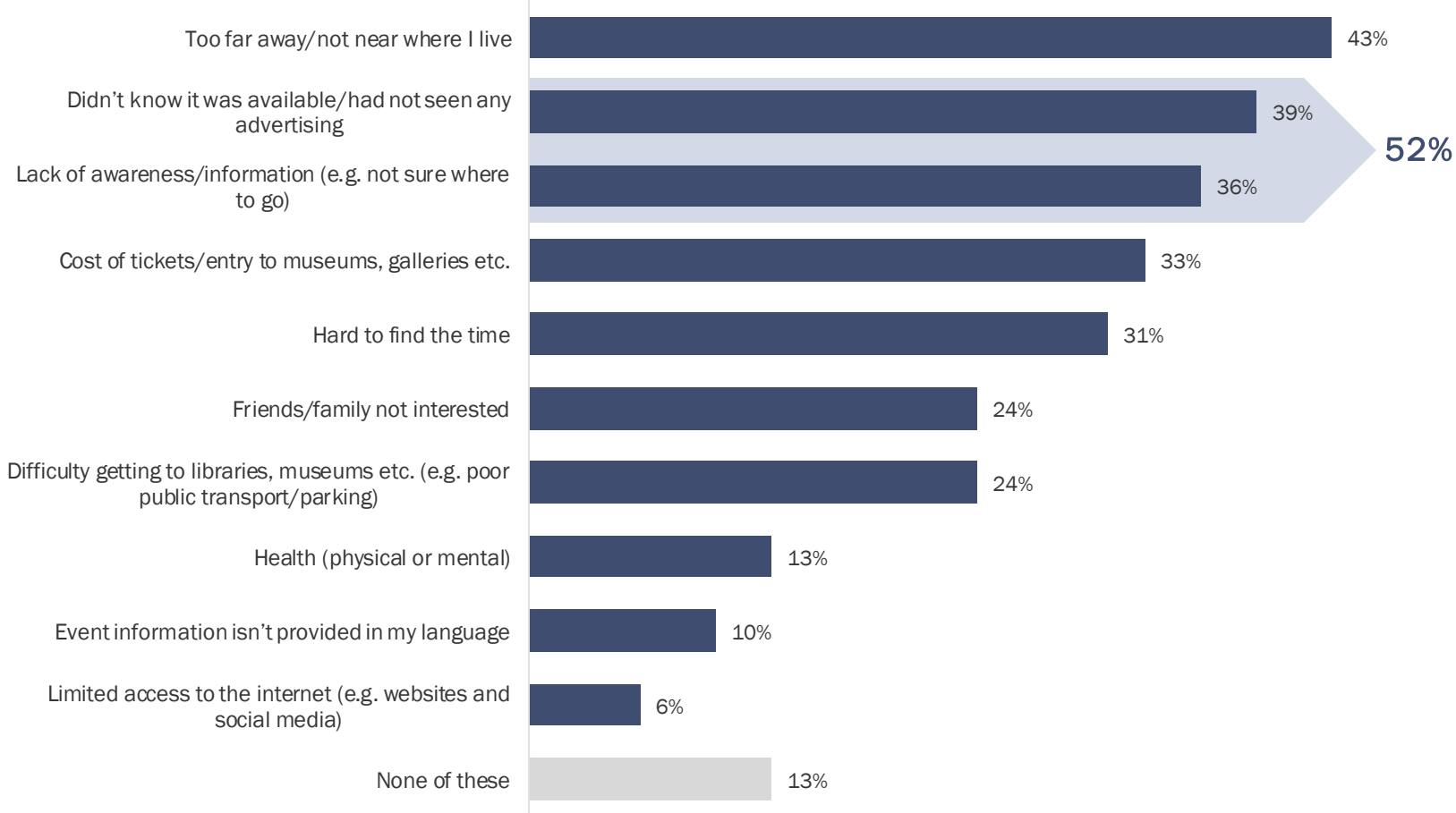
# Respondents were asked to name GLAM organisations that do an excellent job at engaging with their cultural and linguistic background



Non-specific mentioned organisations include museums (13%), art galleries (2%) and libraries (11%).

Almost all (87%) experienced one or more barriers to engaging with the GLAM sector, with a lack of awareness and knowledge of what's on, when and where the main issue, followed by limited access in their local area

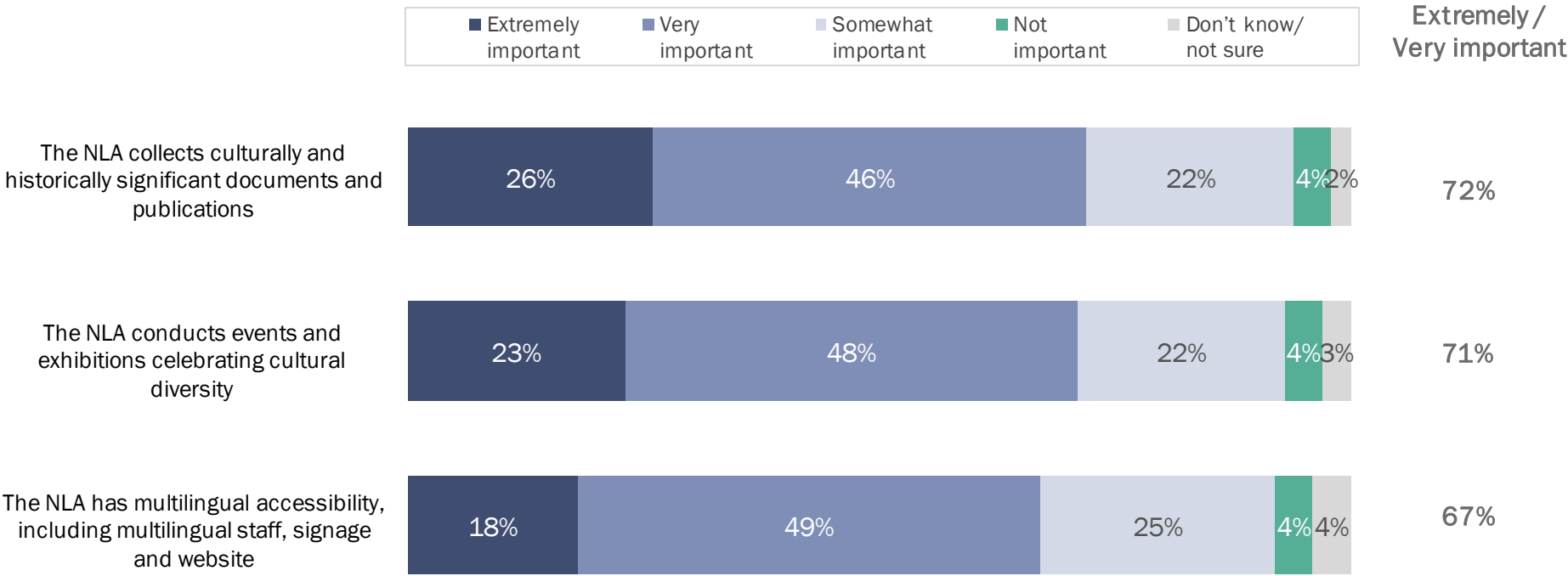
Barriers to engaging with GLAM organisations to connect with and explore cultural heritage



# All the National Library of Australia's activities are perceived positively, although cultural collections and events/exhibitions are particularly important

There is clearly support for the National Library of Australia representing CALD Australians through core activities and staff support

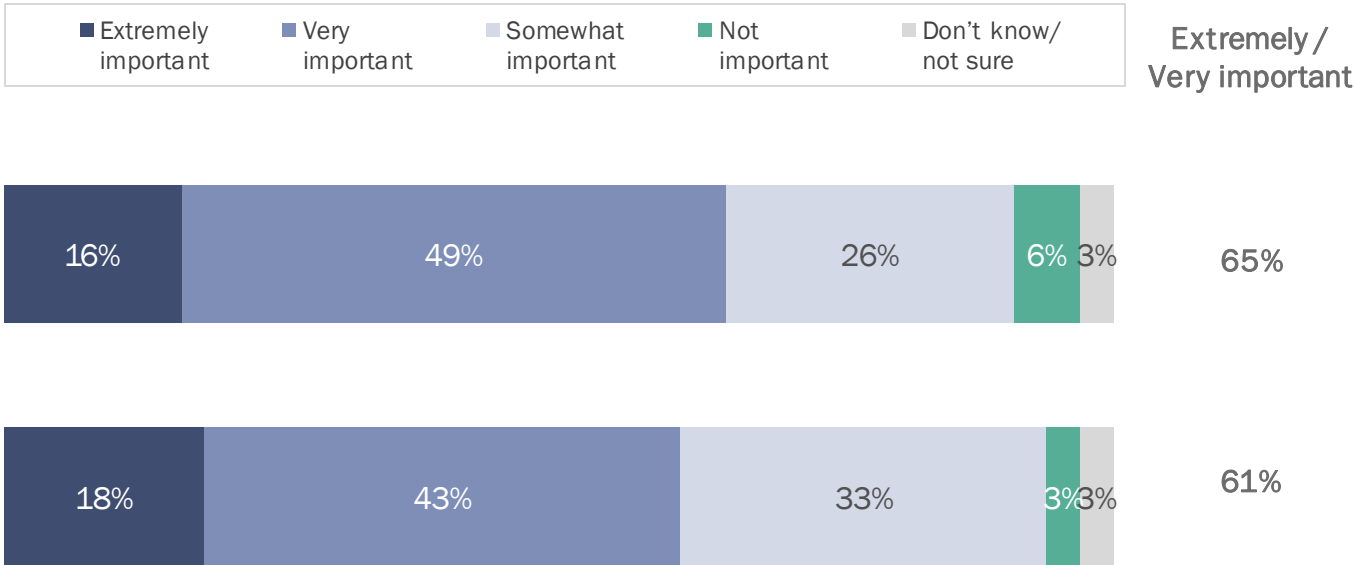
*Important activities for the National Library of Australia*



# While document and material translation services aren't as important as other activities, it's still vital for nearly 1 in 5 respondents

Having services and materials available in other languages is expected

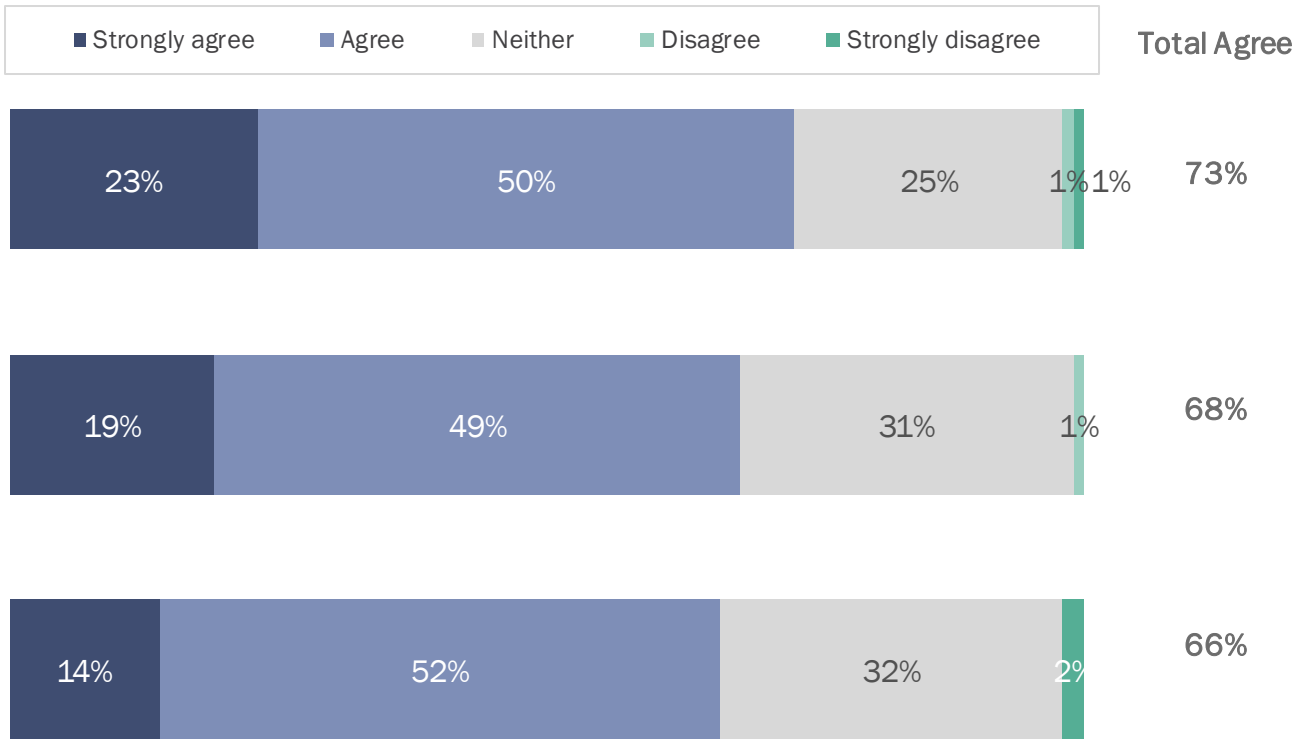
Important activities for the National Library of Australia - continued



# Overall, attitudes to the National Library of Australia are positive, with very few respondents disagreeing with each statement

However, the fairly high proportion answering neither agree nor disagree shows there is an opportunity to increase engagement and strength of agreement

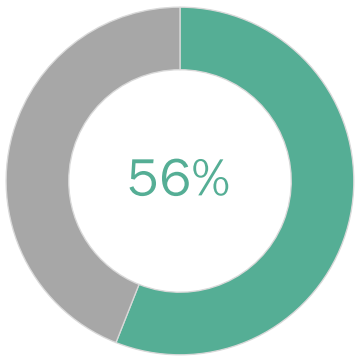
Attitudes to The National Library of Australia



# There is moderate interest in the content provided, but having seen it approximately 7 in 10 are interested in visiting or using the National Library of Australia to learn about or connect with their culture

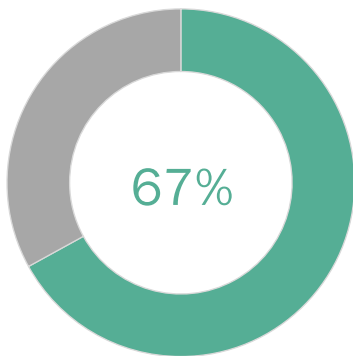
*Interest in content*

Content from multicultural Australia

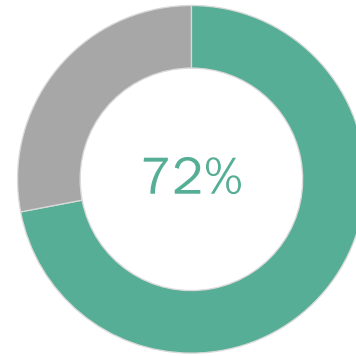


*Interest in the National Library of Australia's offerings having seen the content from multicultural Australians*

Visiting the library



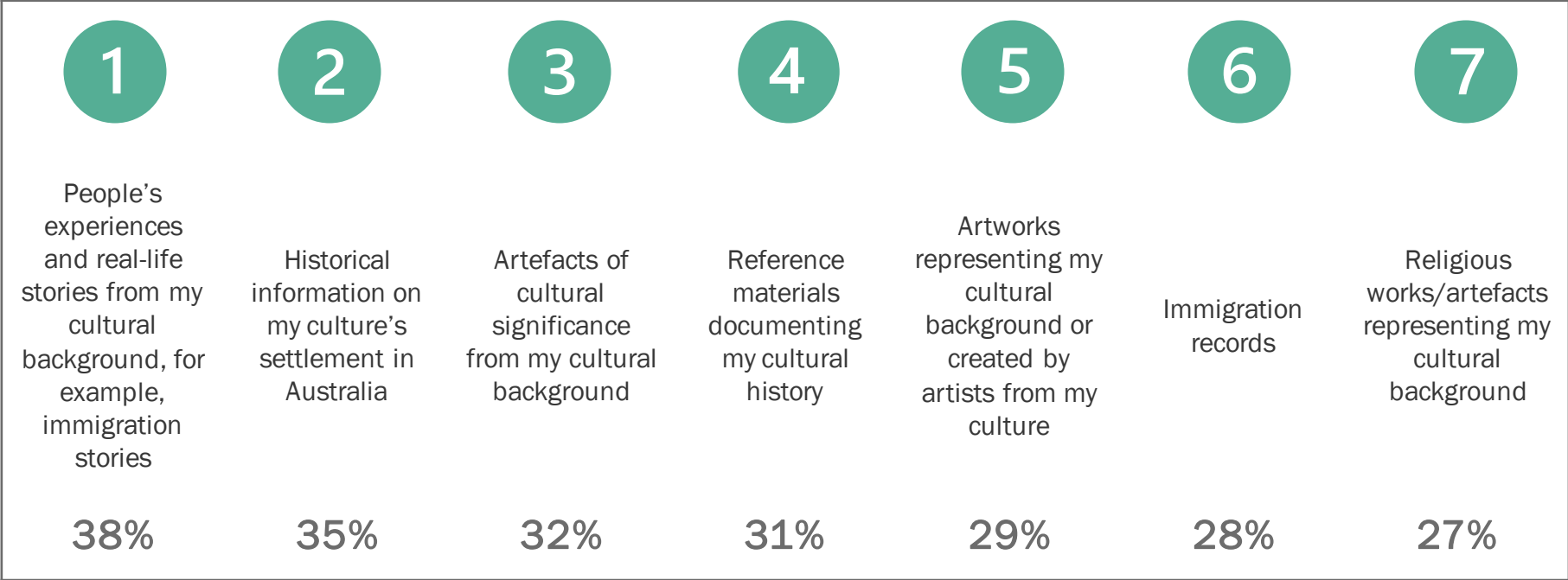
Accessing and browsing materials online



Q15. Interest in content from multicultural Australia is shown in the images below. Please rate your interest in this content. // Q16. Now that you have seen some of the National Library of Australia's offerings, how interested would you be in visiting the library for the purposes of learning about and connecting with your culture? // Q17. Having seen some of their offerings, how interested would you be in accessing and browsing these materials online, for the purposes of learning about and connecting with your culture? Base: Follow-up CALD Survey (n=100)

# Respondents rate people's experiences and real-life stories from their cultural background are most interesting when visiting GLAM institutions

Top 7 areas interested in engaging with or learning about

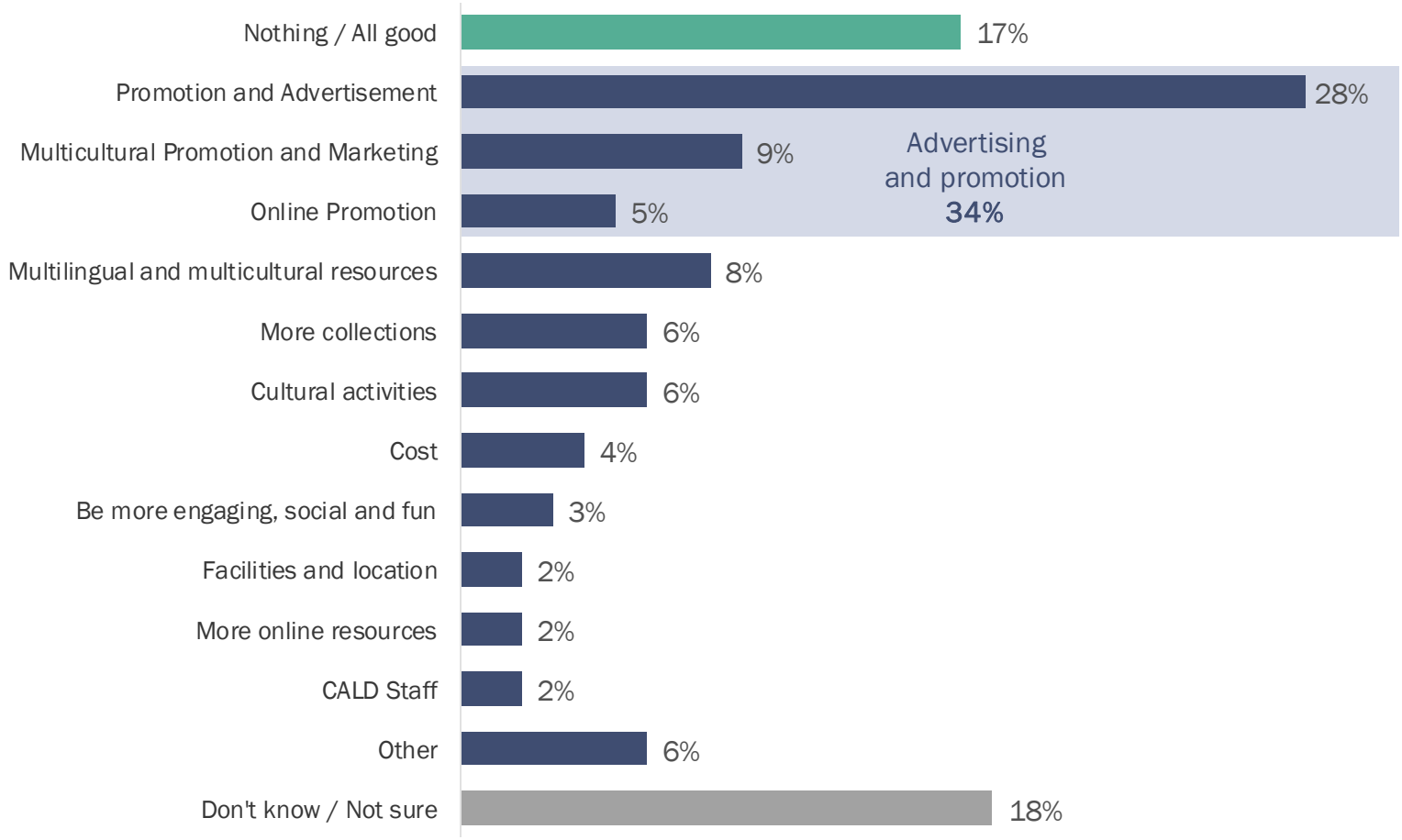




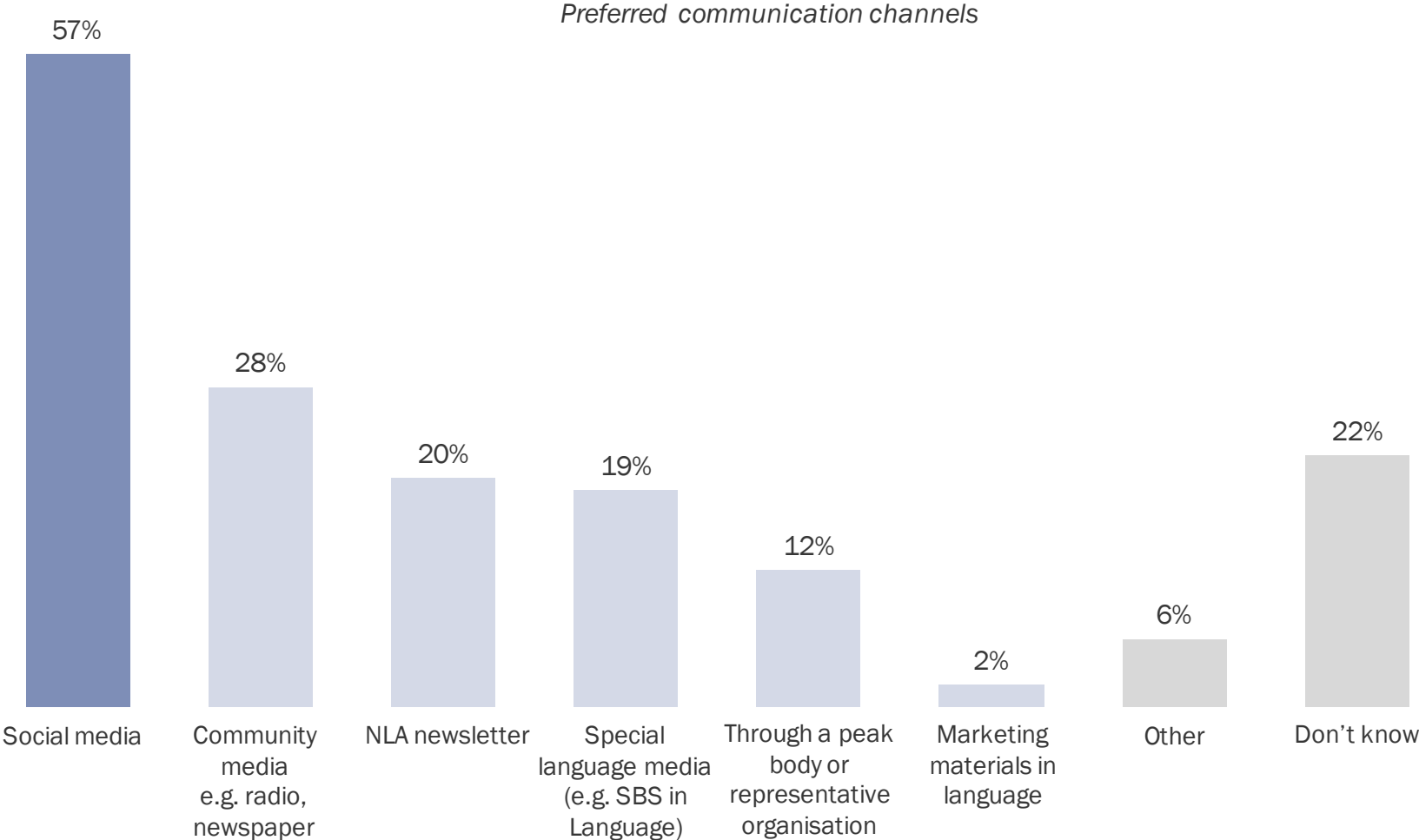
# Two thirds of respondents provided a suggestion for how the National Library of Australia could better engage the culturally and linguistically diverse Australians

A range of ideas were given, with increased advertising and promotion a key takeaway

*Improving the appeal of the National Library of Australia*



# Social media is by far the preferred communication source



## 6.3

# People living with disability

Of the three diversity groups, people living with disability are the least engaged with on-site GLAM and leisure/entertainment venues, with their disability significantly restricting visitation.

Furthermore, the GLAM sector in general is not delivering a 'best in class' visitor experience, and engagement with the activities and services on offer at GLAM institutions is low.

Online is a different story, with a large majority engaging with GLAM and leisure/entertainment venues online because it is so much easier and accessible. However, usage of the National Library of Australia's digital services is very low and prompted interest is moderate (56%).

Venue websites are widely used, and this is a key channel for communicating with this audience.

## Context from stakeholder consultation

- People living with disability encounter many barriers across all aspects of work and life. The underlying desire across the sector is to reduce these barriers wherever possible and the limitations they place on Australians with living with disability.
- For stakeholders, it comes down to providing the same rights of access to people living with disability wherever possible.
- With regards to GLAM institutions and enjoying arts and culture, people living with disability are so often disadvantaged by site access and content access issues, that it has led to an almost acceptance of a second rate experience being offered to them in many cases.
- As a national institution, the National Library of Australia should be setting benchmarks and best practice, however on initial review of the website content and services, stakeholders felt the offer a base or minimum standard at best.

I think the fact that there's only one computer that actually has screen reading technology on it is sort of limited really... I think most access to online resources is going to be from outside the library, but you still want to make what's in the library available in the library.

So being restricted to only one computer is I would say unacceptably limited these days – *Disability Mini-Group*

I don't know what braille resources the National Library would have. I suspect physical braille, virtually none. They may have some digital files that are compatible with braille.

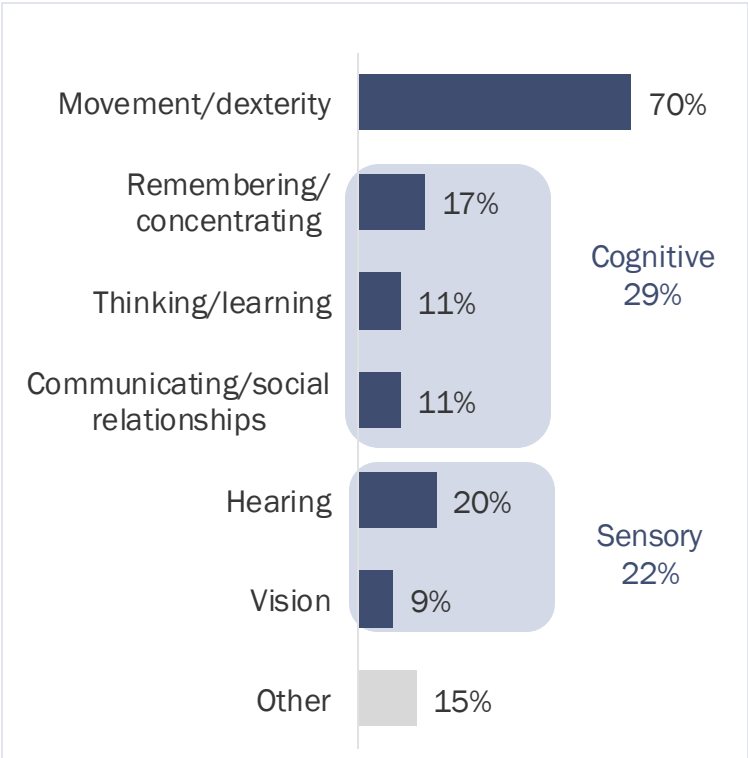
But I think these are the sorts of issues, which are really important... it's actually to look at the accessibility of the resources themselves, and I suspect that that's pretty limited at the moment. – *Disability Mini-Group*

### Stakeholders advised that:

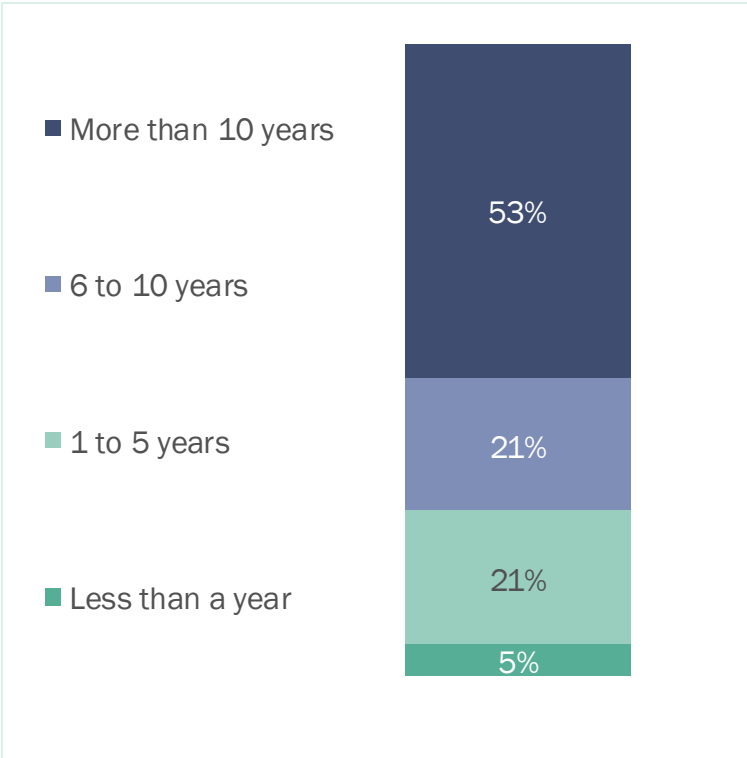
- ✓ Dedicated resources are required to reduce limitations – current services and tailored resources are offered at a minimum standard only
- ✓ The NLA has more work to do especially with regards to content to enable participation both on-site or online
- ✓ Engage with experienced sector stakeholders for advise and practice guidance

# Nearly all respondents have been living with disability for a long time, with over half having done so for more than a decade

Nature of disability

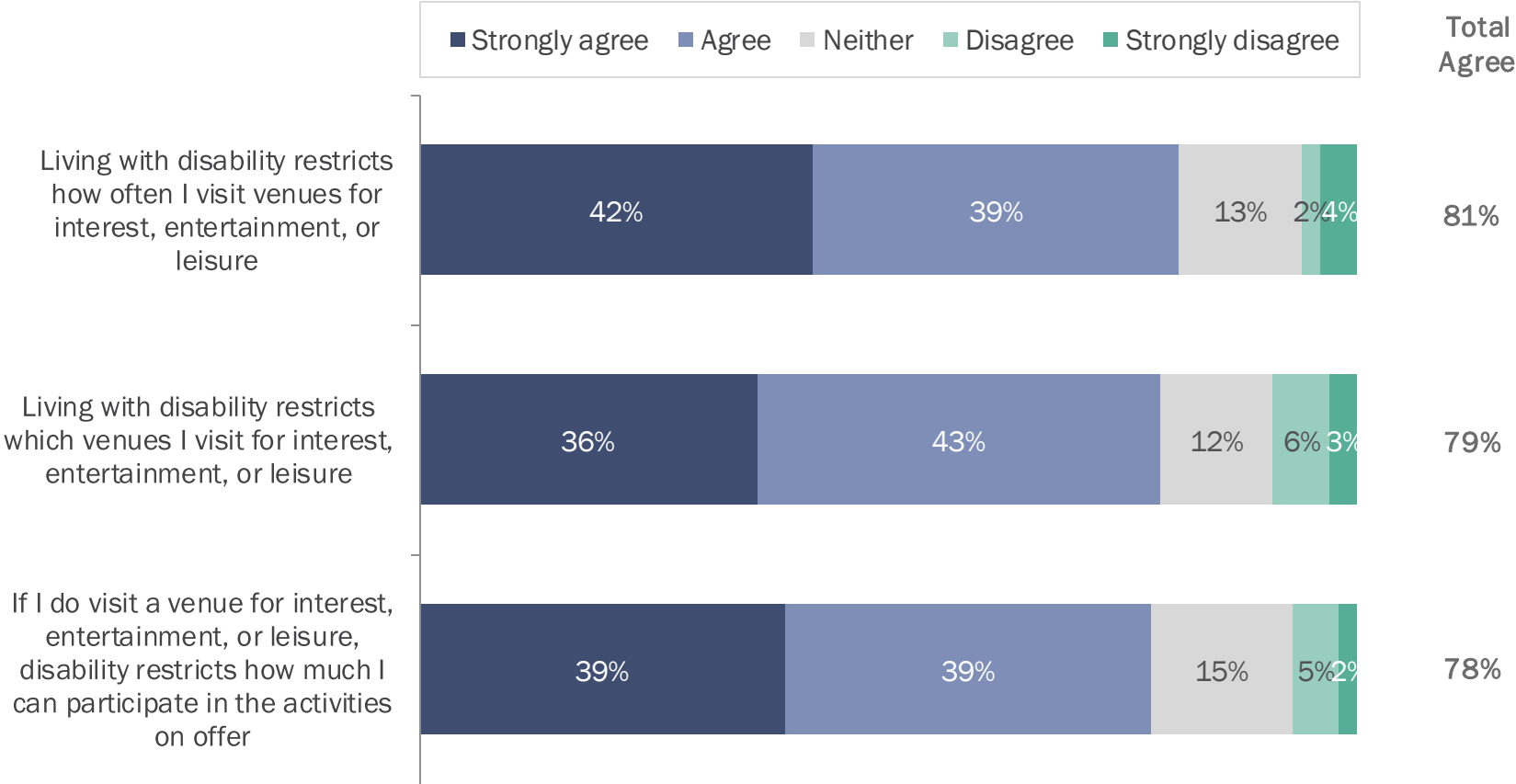


Time living with disability



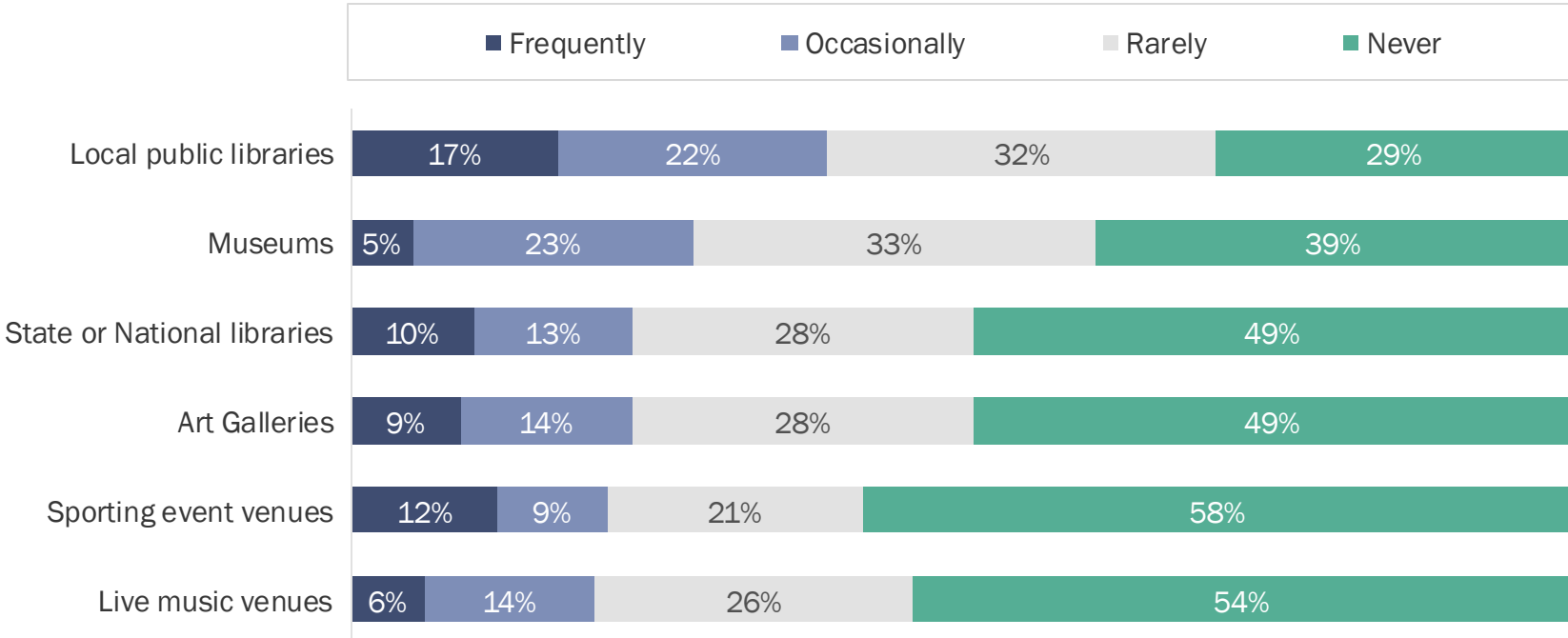
# Living with disability significantly restricts visitation of leisure and entertainment venues

Impact of disability on venue engagement



# On-site visitation of GLAM and other leisure/entertainment venues is low

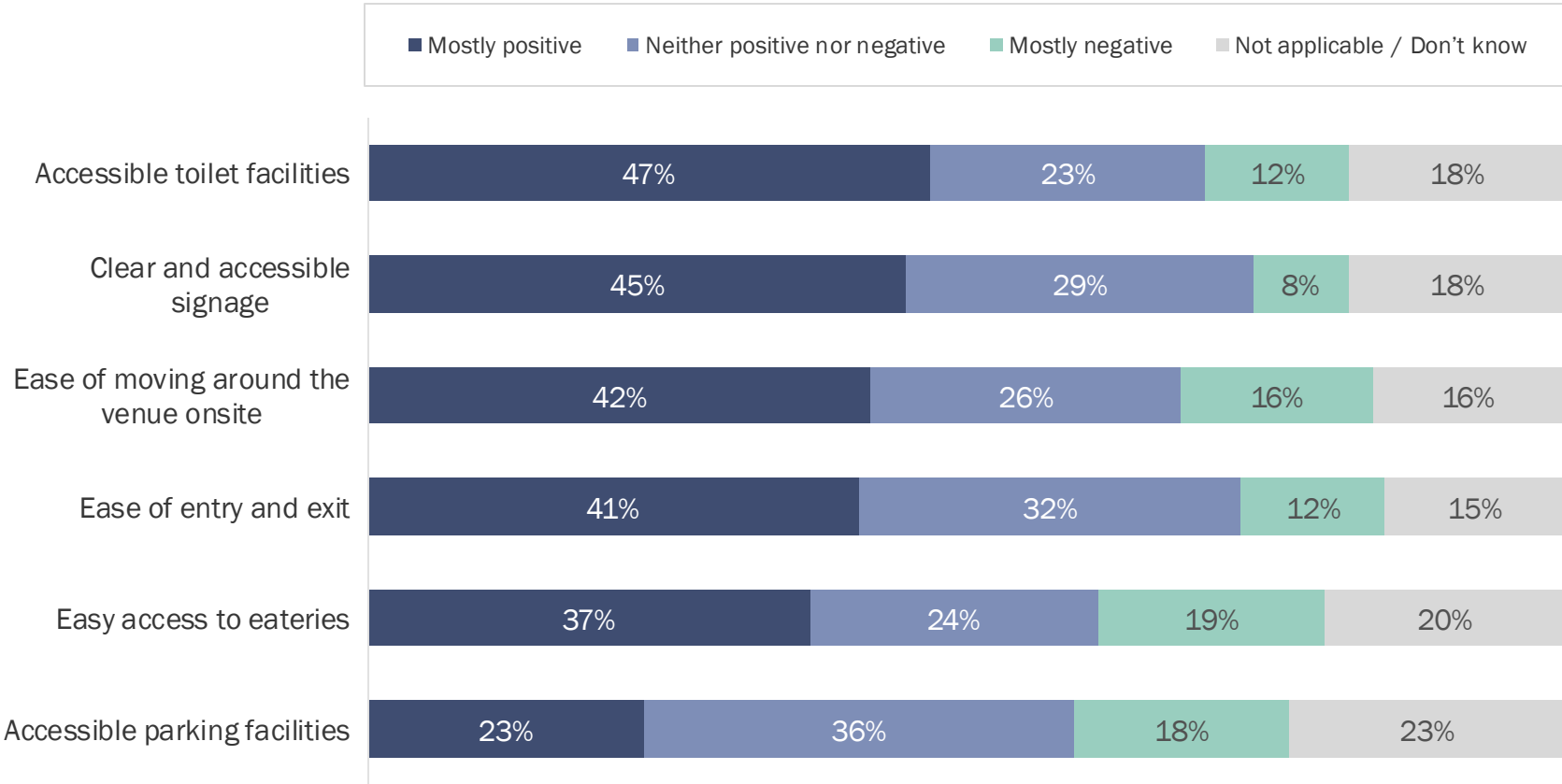
Frequent or occasional visitation ranges from 39% for local public libraries to 20% for live music venues



# Overall, the visitor experience at GLAM institutions could be improved with less than half 'mostly positive' about any aspect

## Access to eateries and provision of accessible parking are key areas for focus

Rating of visitor experience at GLAM institutions

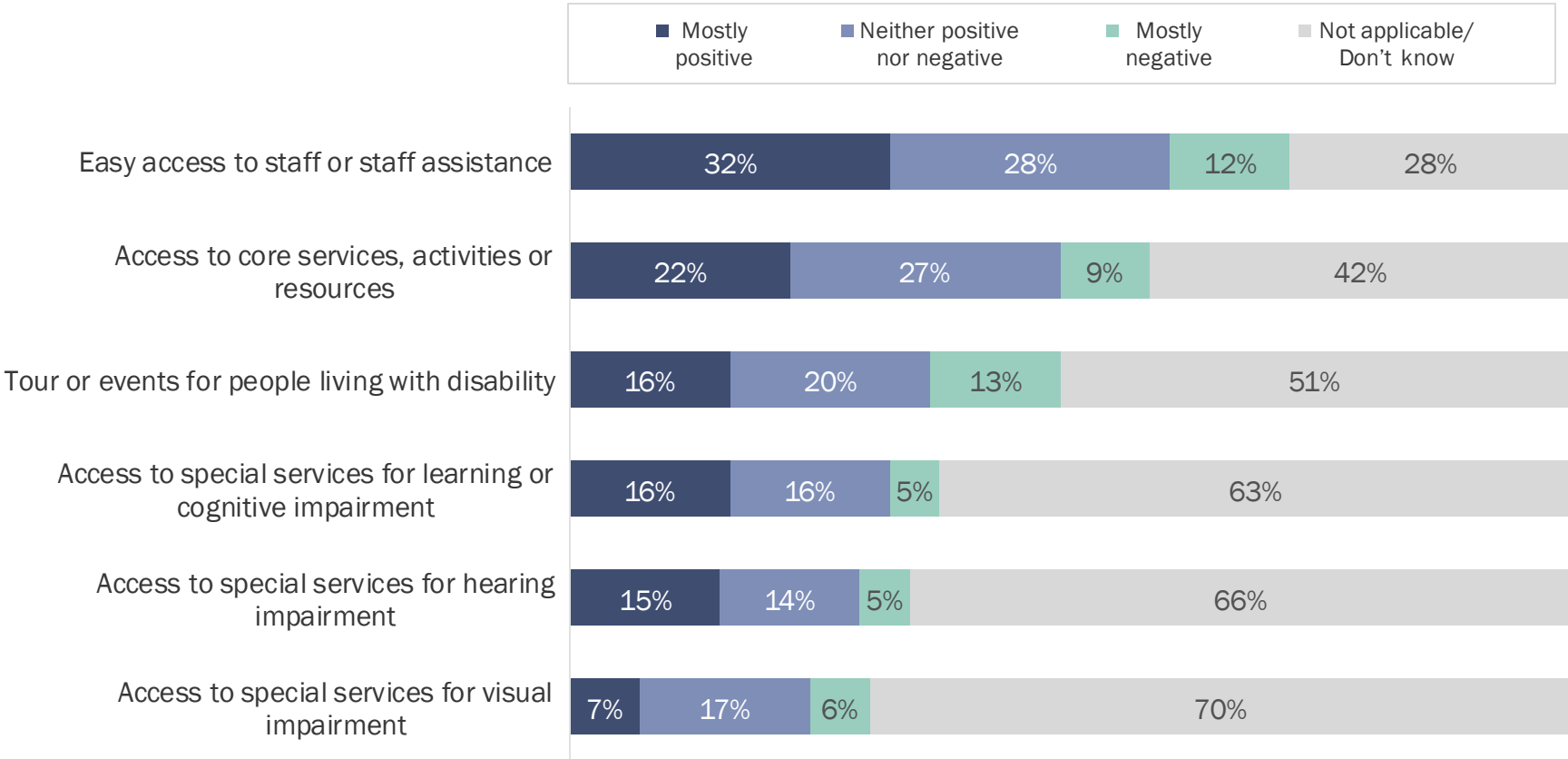




Similarly to the GLAM visitor experience, on-site activities and services could also be improved with the responses showing a general lack of engagement with each

Staffing is an exception, but even this area is low scoring with less than a third rating it as 'mostly positive'

Rating of activities and services at GLAM institutions



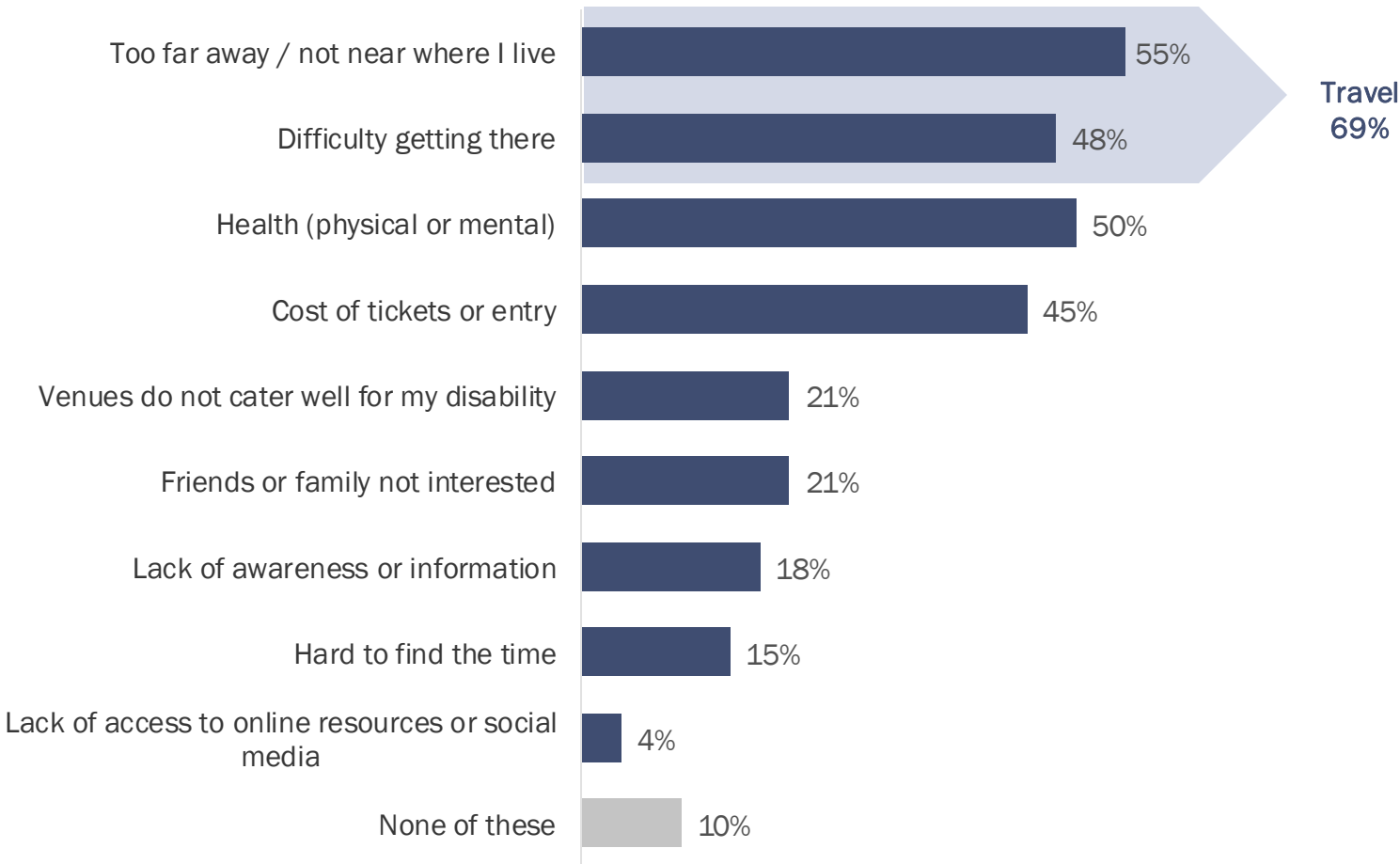
# Respondents were asked to name GLAM organisations that do an excellent job at engaging with people living with disability



Non-specific mentioned organisations include libraries (23%) and museums (1%)

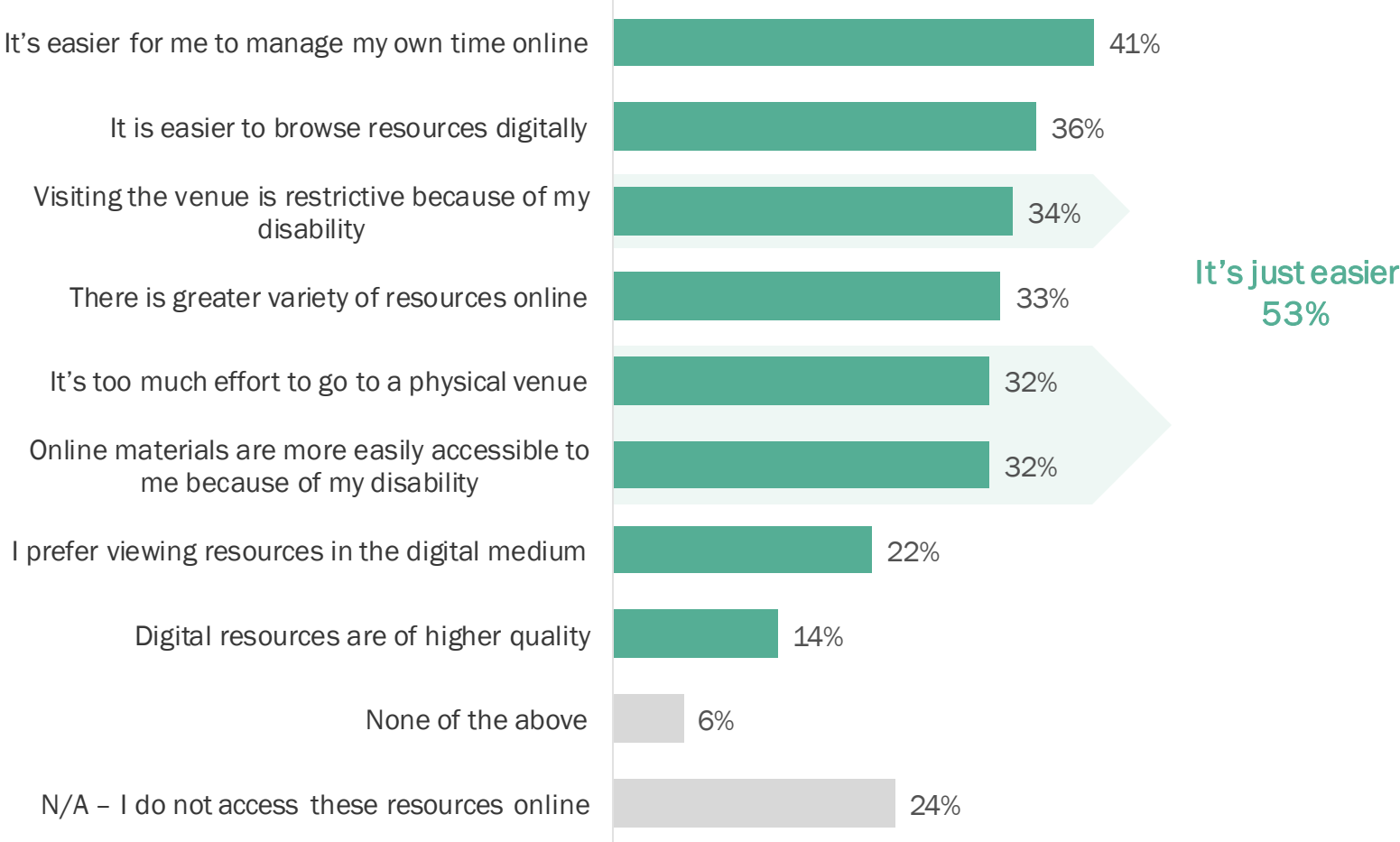
# Almost all (90%) respondents experienced one or more of the presented barriers, with travel being the main issue

Barriers to engaging with GLAM organisations' research activities or events



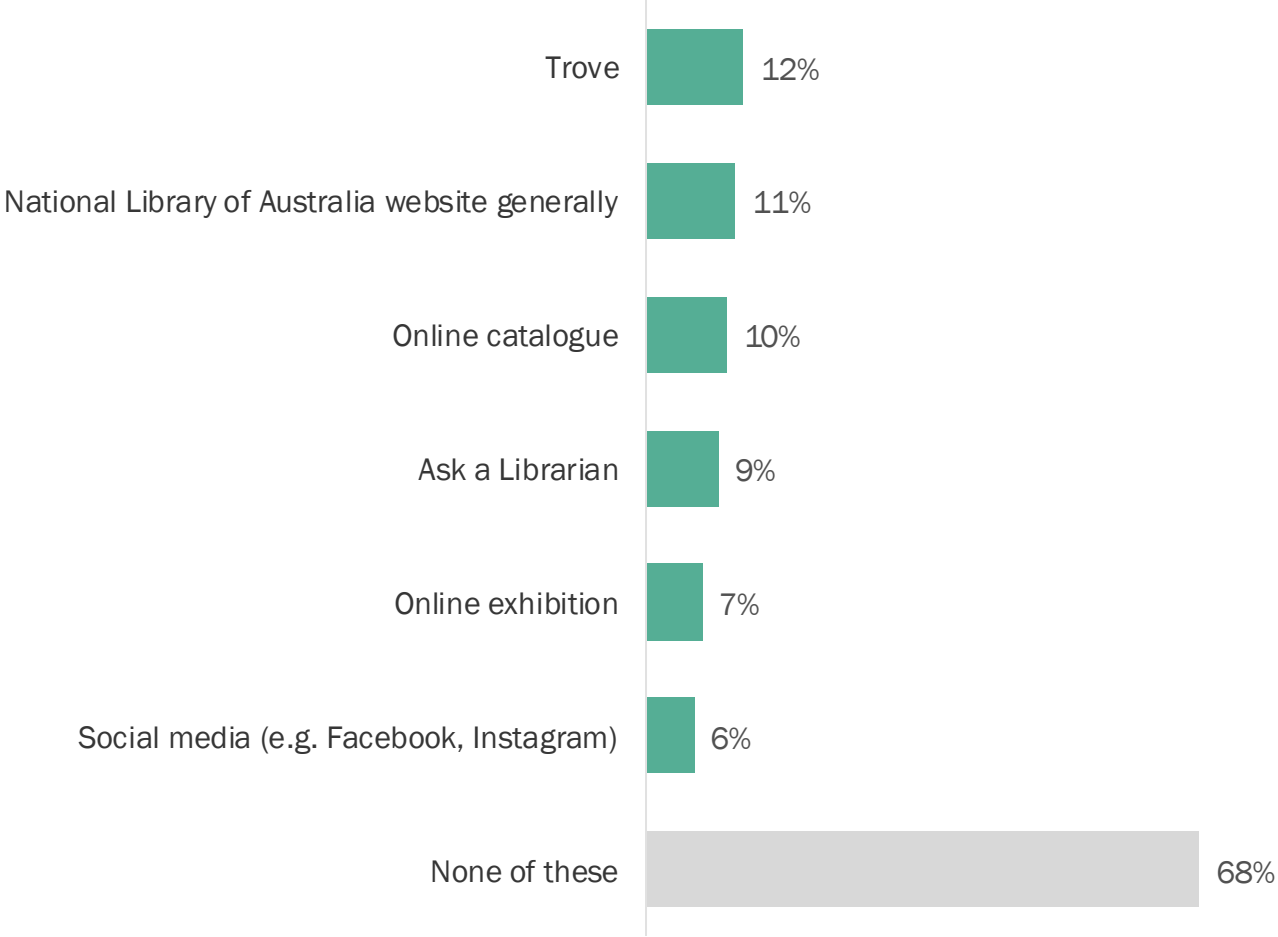
# 3 in 4 respondents access venue content through online channels, with over half doing so because it is so much easier than visiting on-site

Reasons for engaging with venue content through online channels



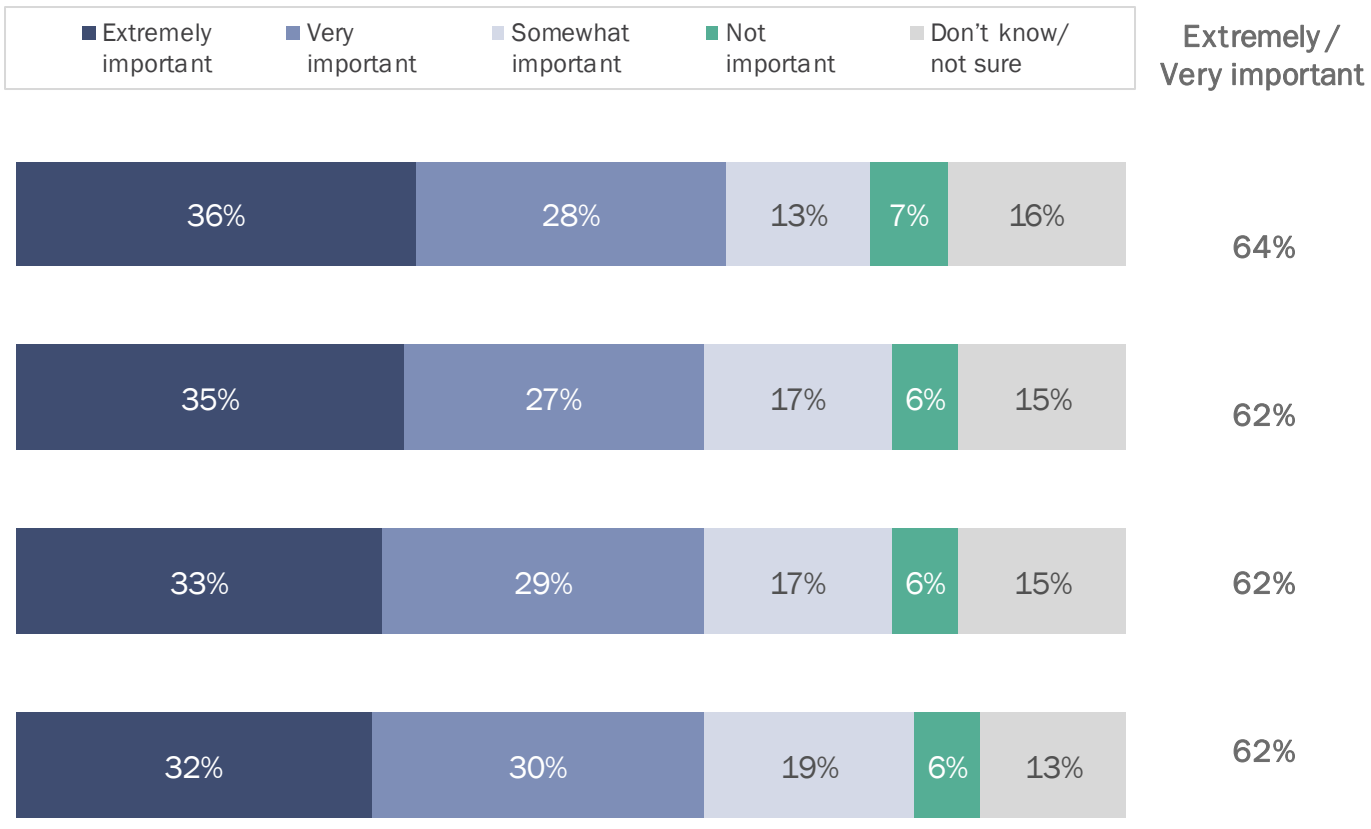
# Despite being digitally engaged with GLAM and leisure/entertainment venues, only a third use the National Library of Australia's online services

The National Library of Australia's online services used



# There is moderate interest in the National Library of Australia’s activities, with almost two thirds rating each as extremely/very important

Important activities for the National Library of Australia



# There is some interest in the National Library of Australia's offerings, with online access preferred over on-site

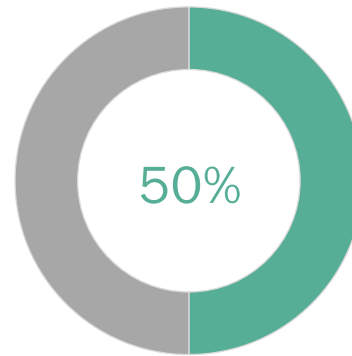
## Interest in The National Library of Australia offerings

The National Library of Australia collects culturally and historically significant documents and publications, as well as educational and academic resources relating to Australia and Australians. They also offer services to assist with study and research activities.

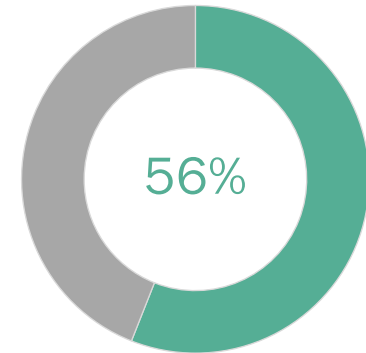
The library's digitised collections are freely available online through Trove.

The National Library of Australia also holds events and exhibitions to allow Australians with disability use the resources and services.

Visiting the library



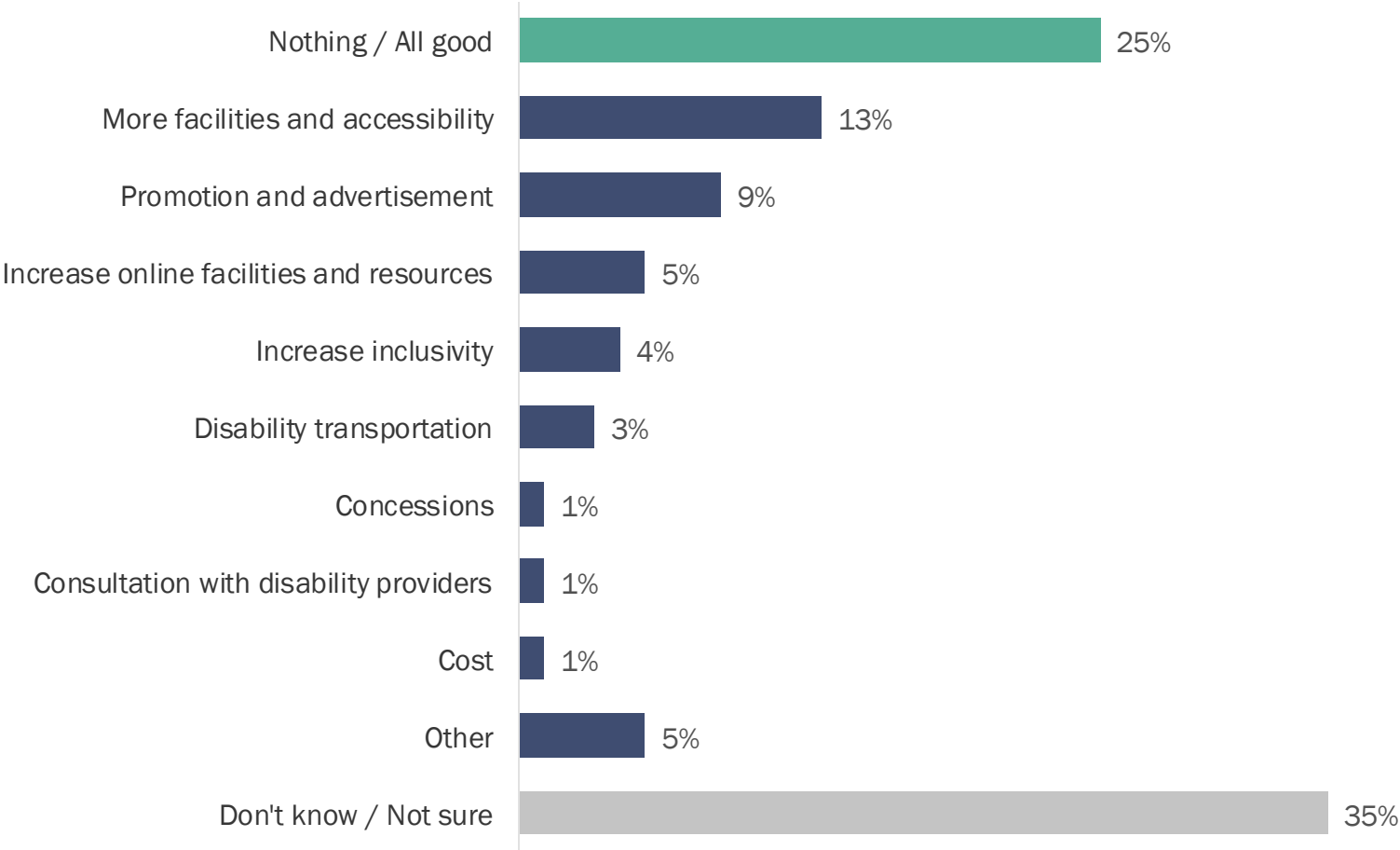
Accessing and browsing materials online



# 2 in 5 respondents (40%) provided a suggestion for how the National Library of Australia could better engage people living with disability

A range of ideas were given, with more inclusive facilities and access a key takeaway

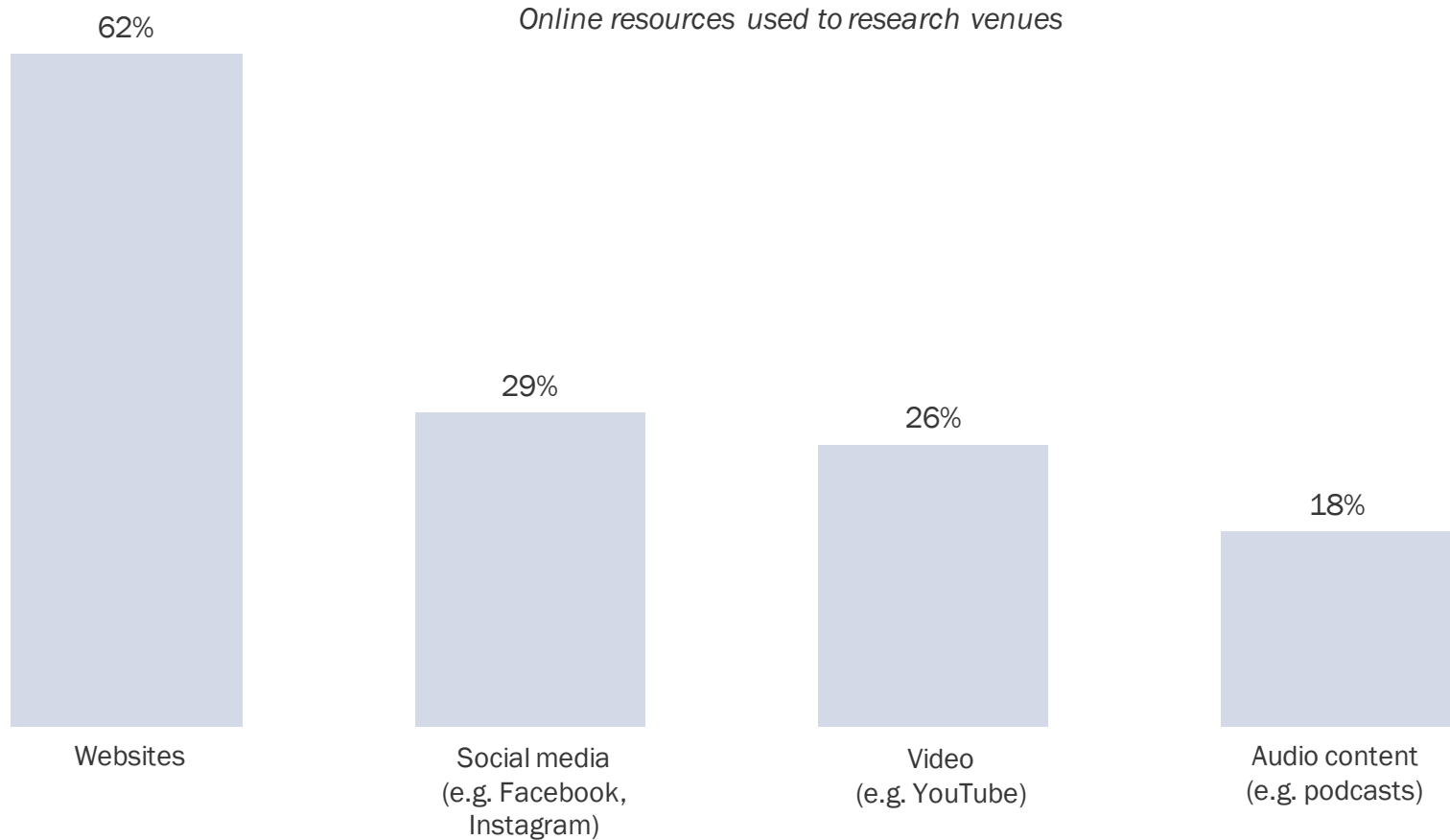
*Improving the appeal of The National Library of Australia*





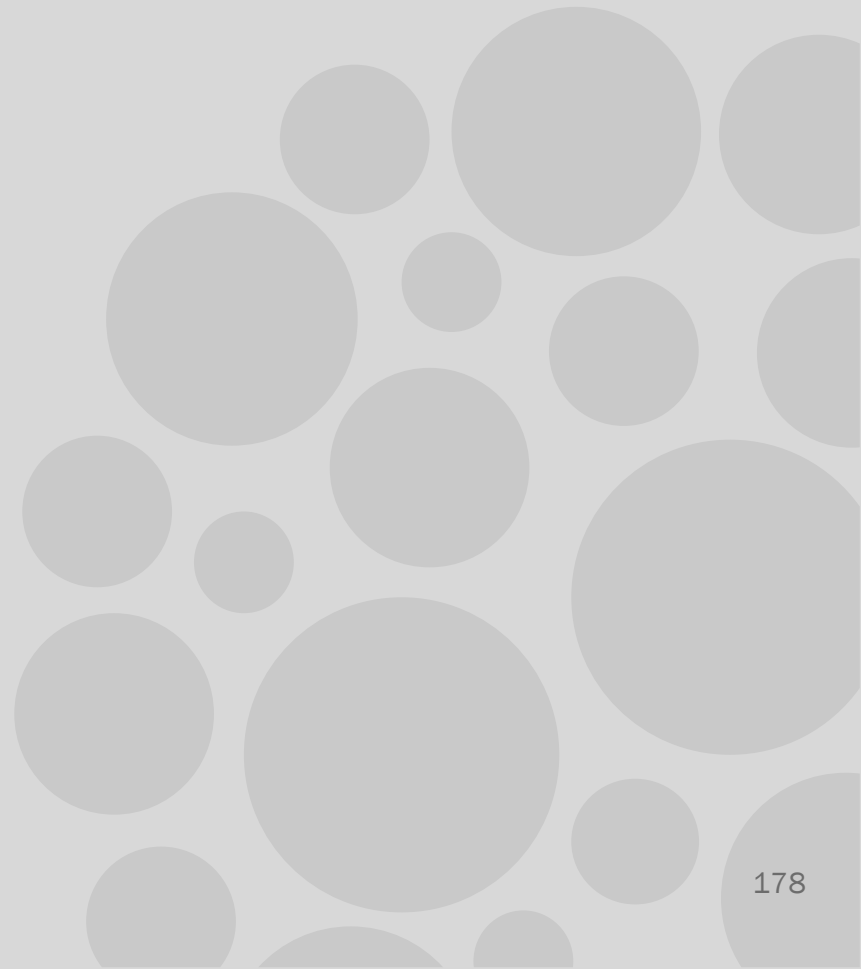
## When researching venues, websites are by far the main channel used

Given the low usage of the National Library of Australia website (11%), those living with disability that do visit must be given a clear reason to engage further





## Moving Forward



# 7.1

## Consumer segmentation

Segmenting Australians into relevant groups for marketing and communication is a valuable exercise and will assist the National Library of Australia in developing messages that are focused on different target groups within the general population, and new audiences in particular.

An **interest and engagement continuum** has been developed that denotes ongoing knowledge and propensity to show interest in library services.

## Creating a consumer segmentation

- After reviewing all the data, looking for differences within the general population survey respondents, as well as analysing the qualitative feedback from research focus groups, it was determined that an **interest and engagement based segmentation** was most likely to provide the National Library of Australia with a relevant model to target new audiences.
- The assumption is that consumers will differ in their likelihood to be interested in and respond to National Library of Australia messages depending on their interest and engagement with the GLAM sector currently and broad interest in what the National Library of Australia does.
- Key variables for use were identified from the general population survey:
  - Current engagement in the GLAM sector
  - Interest in the National Library of Australia and what it offers
  - Support for the National Library of Australia as important to society
  - Support for GLAM institutions as accessible to me
  - Desire to do more in the GLAM sector
- Five core consumer segments were identified from the general population survey based on a continuum of interest and engagement in the sector.

***The segmentation resulted in five target groups based on engagement in the GLAM sector and interest and support for the National Library of Australia***

# Continuum of interest and engagement

GROWTH OPPORTUNITIES

Segment 1



20%

Segment 2



21%

Segment 3



23%

Segment 4



19%

Segment 5



16%

Disengaged

Moderately engaged

Highly engaged

Mostly no GLAM visitation

**Not interested** in visiting GLAM institutions

Low interest in NLA, its resources and activities (scored 19)

Least likely to believe the National Library of Australia contributes positively to education and society (scored 62)

Low GLAM Visitation

**Happy** with how often they visit GLAM institutions

Medium interest in NLA, its resources and activities (scored 35)

3rd most likely to believe the National Library of Australia contributes positively to education and society (scored 72)

Low-medium GLAM visitation

Would like to visit GLAM institutions **more often**

Medium interest in NLA, its resources and activities (scored 42)

4th most likely to believe the National Library of Australia contributes positively to education and society (scored 70)

High GLAM Visitation

Would like to visit GLAM institutions **more often**

Highest interest in NLA, its resources and activities (scored 72)

Most likely to believe the National Library of Australia contributes positively to education and society (scored 93)

High GLAM Visitation

**Happy** with how often they visit GLAM institutions

High interest in NLA, its resources and activities (scored 70)

2nd most likely to believe the National Library of Australia contributes positively to education and society (scored 86)

# Use the market segments based on engagement and interest to develop overarching strategic goals across audience types

Segment 1



20%

Segment 2



21%

Segment 3



23%

Growth Sectors

Segment 4



19%

Segment 5



16%

Not engaged

Moderately engaged

Highly engaged

**Segment 1** is not actively engaged in the GLAM sector and shows little to no interest in engaging with the National Library of Australia.

AIM: The aim for this segment should be to simply raise awareness and communicate key benefits of the National Library of Australia to society as a whole (cultural significance, relevance to education).

Knowing the library exists and supporting what it does and why would be sufficient for this segment.

Raising levels of engagement beyond this will be more difficult.

AIM: Leverage budding interest and support using known drivers and reasons to engage in GLAM/library activities. Note Segment 3 will be easily motivated by their desire to ‘do more’ in the sector.

Key drivers: Focus messaging around engaging for leisure/entertainment (and social enjoyment). Some reference to learning will also be motivating, however this should still be leisure focused.

**Segment 2 & 3** are not familiar with the National Library of Australia and need **easy pathways** into information. Whilst the **joy of discovery** can inspire, it’s more about the library providing ‘easy discovery’, presenting the story/entertainment to me, rather than presenting a task. I shouldn’t have to look and dig.

Language: conversational, inviting, lack of academic references/intellectual elitism.

AIM: Consolidate support and find avenues for advocacy (e.g. through current activity channels), especially for Segment 5. Encourage and support word of mouth opportunities. Find ways to grow active engagement for Segment 4.

Key drivers: Messaging can cover both leisure/entertainment and learning opportunities. They are also the most likely segments to respond to work/study tasks.

**Segment 4 & 5** will likely be the easiest segments to motivate given their connection to the sector and inherent interest in the National Library of Australia. They will embrace the **joy of discovery** and be inspired to dig through detailed resources and find things independently.

Language: can be more educational and assume pre-established knowledge and interest in reference libraries and reference resources.

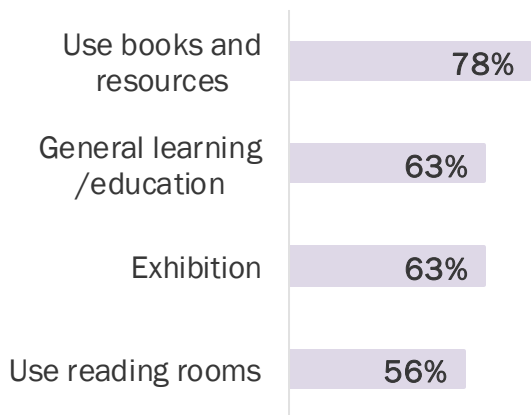


# Segment 5 – Most Actively Engaged

## DEMOGRAPHICS

Gender	57% male (avg. 49%)
Age	Younger (18-34)
First Nations	9% (avg. 3%)
CALD	30% (avg. 17%)
Education	University and Postgraduate
Work status	Employed full-time

## TOP 4 LIBRARY DRIVERS



### FIRST HEARD ABOUT THE NLA FROM:

1. Friends/family
2. Social Media

## TOP 4 GLAM MOTIVATORS

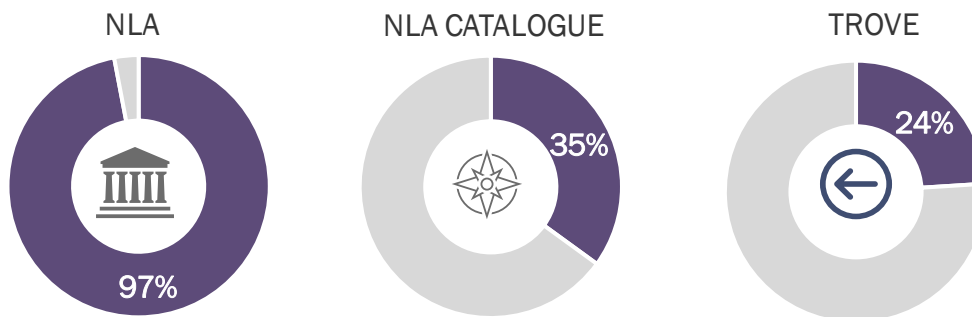
1. Leisure
2. Educate self
3. Exhibitions
4. Events



### TOP 2 GLAM ONLINE MOTIVATORS

Easier to browse digitally (51%)  
Greater variety of resources online (42%)

## AWARENESS



## ENGAGEMENT

VISITED THE NLA IN THE LAST 5 YEARS **43%**



OVERALL INTEREST IN NLA OFFERINGS

**94%**

Know a lot about the NLA

**21%**

Promoters

**52%**



# Segment 4 – Highly Engaged (GROWTH SECTOR)

## DEMOGRAPHICS

Gender	63% female (avg. 51%)
Age	Average
First Nations	Average
CALD	Average
Education	Postgraduate
Work status	Average

## TOP 4 GLAM MOTIVATORS

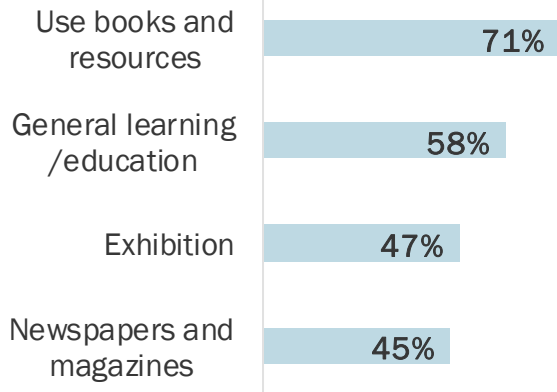
1. Leisure
2. Exhibitions
3. Educate self
4. Events



### TOP 2 GLAM ONLINE MOTIVATORS

Easier to browse digitally (52%)  
Greater variety of resources online (36%)

## TOP 4 LIBRARY DRIVERS



### FIRST HEARD ABOUT THE NLA FROM:

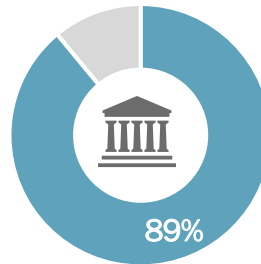
1. Friends/family
2. Saw the building

### OVERALL INTEREST IN NLA OFFERINGS

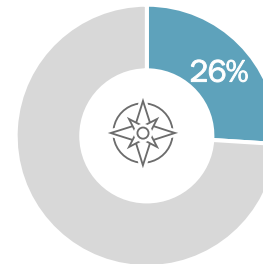
98%

## AWARENESS

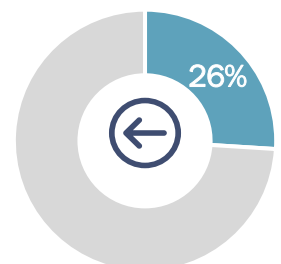
NLA



NLA CATALOGUE



TROVE



## ENGAGEMENT

VISITED THE NLA IN THE LAST 5 YEARS

25%

Know a lot about the NLA

7%

Promoters

56%



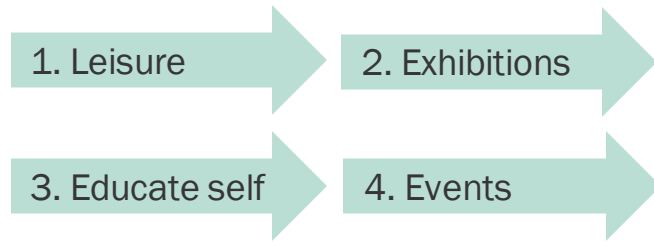


# Segment 3 – Moderately Engaged (GROWTH SECTOR)

## DEMOGRAPHICS

Gender	Average
Age	Average
First Nations	Average
CALD	Average
Education	Average
Work status	Average

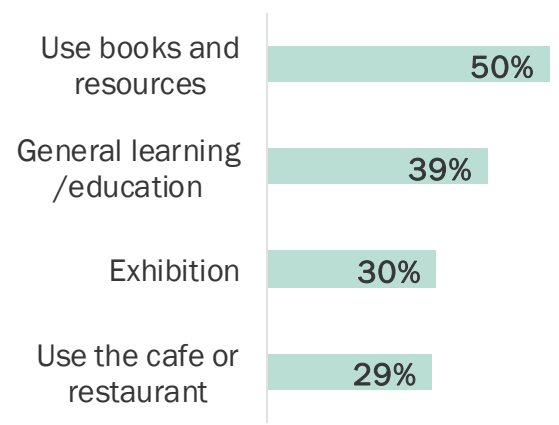
## TOP 4 GLAM MOTIVATORS



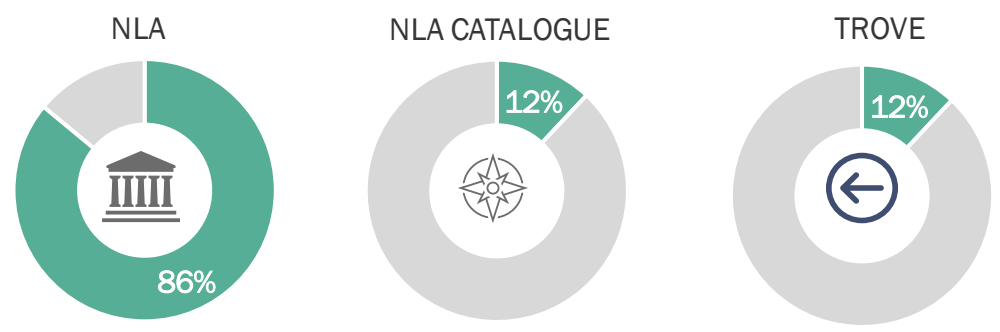
### TOP 2 GLAM ONLINE MOTIVATORS

Easier to browse digitally (39%)  
Greater variety of resources online (22%)

## TOP 4 LIBRARY DRIVERS

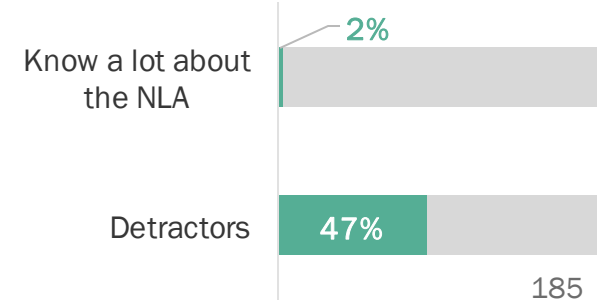


## AWARENESS



## ENGAGEMENT

VISITED THE NLA IN THE LAST 5 YEARS **16%**



**FIRST HEARD ABOUT THE NLA FROM:**  
1. Friends/family  
2. Social Media

**OVERALL INTEREST IN NLA OFFERINGS** **67%**



## DEMOGRAPHICS

Gender	Average
Age	Younger (18-34)
First Nations	1% (avg. 3%)
CALD	12% (avg. 17%)
Education	Average
Work status	Average

## TOP 4 GLAM MOTIVATORS

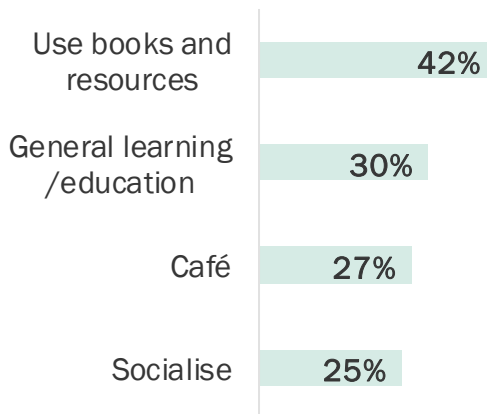
1. Leisure
2. Exhibitions
3. Educate self
4. Tourism



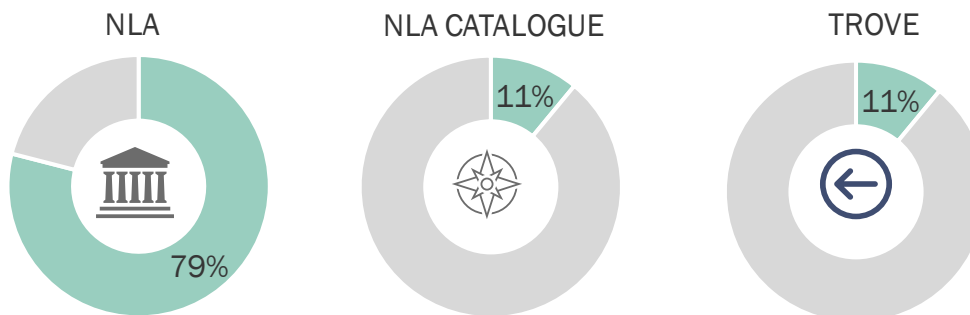
### TOP 2 GLAM ONLINE MOTIVATORS

Easier to browse digitally (36%)  
Greater variety of resources online (21%)

## TOP 4 LIBRARY DRIVERS



## AWARENESS



## ENGAGEMENT

VISITED THE NLA IN THE LAST 5 YEARS **11%**



FIRST HEARD ABOUT THE NLA FROM:  
Friends/family



OVERALL INTEREST IN NLA OFFERINGS **55%**





# Segment 1 – Not Engaged

## DEMOGRAPHICS

Gender	Average
Age	Older (50+)
First Nations	Average
CALD	12% (avg. 17%)
Education	Low University and Postgraduates
Work status	More retirees

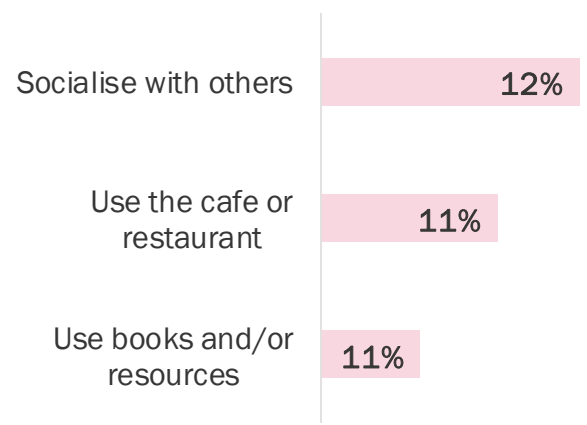
## TOP 4 GLAM MOTIVATORS

None

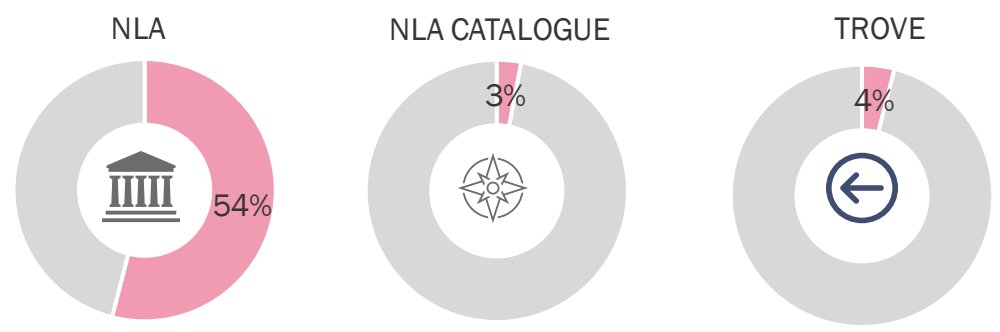


TOP 2 GLAM ONLINE MOTIVATORS  
None

## TOP 3 LIBRARY DRIVERS

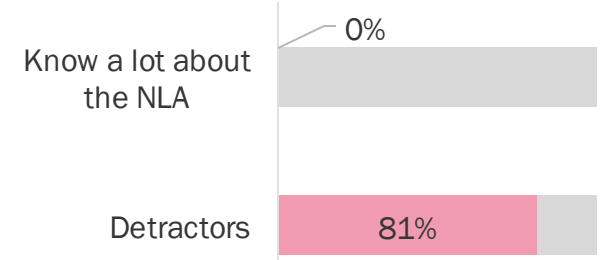


## AWARENESS



## ENGAGEMENT

VISITED THE NLA IN THE LAST 5 YEARS **4%**



FIRST HEARD ABOUT THE NLA FROM: Friends/family

OVERALL INTEREST IN NLA OFFERINGS **19%**

## 7.2

# Consumer personas

The segments identified can be further refined into 14 consumer personas developed by digging deeper into demographic and lifestyle variables.

Age, life stage, education and cultural background are particularly important in determining specific personas. These personas can be used to further refine services and product offers, marketing messages, tone of communication and channels of most relevance.

# 14 Consumer Personas

## Segment 2



21%

## Segment 3



23%

## Segment 4



19%

## Segment 5



16%

### Persona 13 – High income city millennials

*Living in metro areas, in particular Adelaide & Perth, these full time employees are mainly interested in family/kids events & family history*

### Persona 14 – Country town retirees

*Older cohort living in regional areas, in particular QLD. Don't think GLAM institutions are for them, but there's reasonable interest in the library's offerings in particular family history & free exhibitions*

### Persona 9 – Work-focused single males

*Full-time employees, mostly obtaining a Bachelors degree, there is reasonable interest in NLA offerings, but less than half don't think GLAM institutions are for them*

### Persona 10 – Family-focused females

*Homemakers or part-time workers who use libraries for books & resources and general learning. Interested in family history & free exhibitions*

### Persona 11 – GLAM aware highly educated metro males

*Mostly males, aged 25-39 living in metro areas, in particular Sydney. Reasonable interest in the library with main interests in free exhibitions & family history*

### Persona 12 – Metro millennial Dads

*Young people, predominately males living in metro areas, in particular Melbourne and Perth, of whom half are interested in the library but only a third think GLAM institutions are for them*

### Persona 5 – GLAM curious highly educated city females

*Mostly females living in metro areas, in particular Sydney. A third were born overseas, mostly from UK, India and New Zealand*

### Persona 6 – GLAM curious regional female baby boomers

*Living in regional areas, in particular NSW, mostly older females. Nearly all are interested in the library's offerings, in particular free exhibitions & family history*

### Persona 7 – GLAM curious female bookshop lovers

*Aged 25-49, with a TAFE or Bachelors degree, nearly all interested in the library's offerings, in particular free exhibitions & collections*

### Persona 8 – GLAM-curious regional female retirees

*Predominately retired & empty nesters, most are women, living in regional areas. High awareness of Trove with main interests including exhibitions & family history*

### Persona 1 – Male hipster millennials

*Living in metro areas, in particular Melbourne, most are interested in the library's offerings, especially free exhibitions and collections*

### Persona 2 – GLAM engaged female baby boomers

*Living in regional areas and ACT, nearly all are interested in the library's offerings, especially free exhibitions and stories*

### Persona 3 – Culturally connected First Nations males

*Predominately males living in Sydney, who are parents most likely to visit library to buy a book or gift*

### Persona 4 – Culturally active multi-cultural males

*Predominately males with a bachelors / postgraduate degree wanting to use libraries for books & resources and general learning*

# 14 Consumer Personas –communication methods

## Segment 2



21%

## Segment 3



23%

## Segment 4



19%

## Segment 5



16%

Persona 13 – High income city millennials



Persona 9 – Work-focused single males



Persona 5 – GLAM curious highly educated city females



Persona 1 – Male hipster millennials



Persona 14 – Country town retirees



Persona 10 – Family-focused females



Persona 6 – GLAM curious regional female baby boomers



Persona 2 – GLAM engaged female baby boomers



Persona 11 – GLAM aware highly educated metro males



Persona 7 – GLAM curious female bookshop lovers



Persona 3 – Culturally connected First Nations males



Persona 12 – Metro millennial Dads



Persona 8 – GLAM-curious regional female retirees



Persona 4 – Culturally active multi-cultural males





### DEMOGRAPHICS

Age	18-34 years
Gender	63% Male
Residence	Metro areas, Melbourne
Education	Bachelors degree
Work status	Employed full-time
Country of birth	Australia

### HOUSEHOLD

Composition	Living with parents or friends
Income	\$93k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Use reading rooms and/or quiet study spaces
- 3 General learning / education
- 4 Specific research

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- For general entertainment / leisure
- To enjoy a quiet space
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

Should reflect the diversity of cultures present  
Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **76%**

### AWARENESS AND ENGAGEMENT



NLA

Know a lot about



High level of trust in



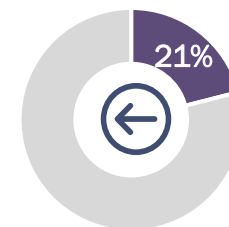
Promoters



Catalogue awareness



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS



### MAIN INTERESTS

- Free exhibitions
- Collections

### VISITATION DRIVERS

- To enjoy a quiet space
- To study for work, school or university
- To socialise with others
- To educate / provide an experience for my family / friends



### DEMOGRAPHICS

Age	50+ years
Gender	61% Female
Residence	Regional and ACT
Education	TAFE or Technical
Work status	Retired
Country of birth	Australia

### HOUSEHOLD



#### Composition

Couple living without children, or living with adult children

#### Income

\$70k

#### Language

English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Visit an exhibition
- 3 Research for general learning or education
- 4 Attend an event

### TOP 4 GLAM DRIVERS

- To educate myself/learn something generally
- To visit a specific exhibit or exhibition
- For general entertainment / leisure
- To attend a specific event

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

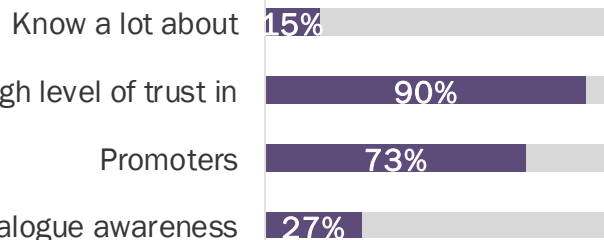
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **84%**

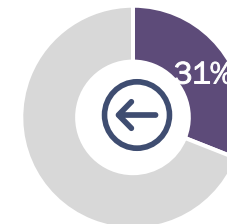
### AWARENESS AND ENGAGEMENT



NLA



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **98%**

**MAIN INTERESTS**  
Free exhibitions  
Stories

### VISITATION DRIVERS

- For general entertainment/leisure
- To educate myself/learn something generally
- To visit as a main tourist attraction





### DEMOGRAPHICS

Age	25-34 years
Gender	75% Male
Residence	Sydney
Education	Postgraduate
Work status	Employed full-time
Country of birth	Australia

### HOUSEHOLD



Composition	Parents
Income	\$118k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Buy a book or a gift
- 2 Use books and resources
- 3 Browse or read newspapers
- 4 General research

### TOP 4 GLAM DRIVERS

To attend a specific event      To socialise with others

To visit a main tourist attraction      For general entertainment / leisure

### TOP 2 GLAM INSTITUTIONS ...

- Are accessible to me to visit online
- Should reflect the diversity of cultures present



### TOP 2 GLAM ONLINE DRIVERS

- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **80%**

### AWARENESS AND ENGAGEMENT



NLA

Know a lot about

54%

High level of trust in

77%

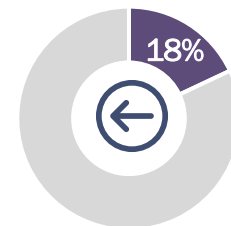
Promoters

56%

Catalogue awareness

44%

### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS

91%

### MAIN INTERESTS

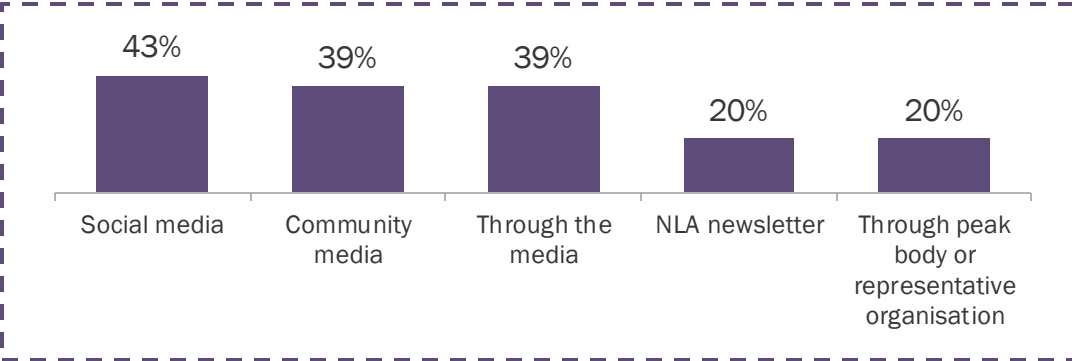
- Free exhibitions
- Collections

### VISITATION DRIVERS

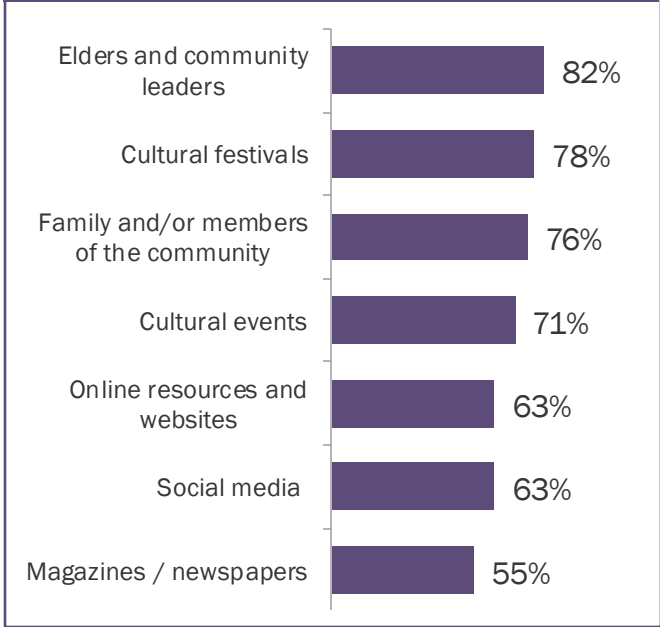
- To educate / provide an experience for my family / friends
- To socialise with others
- To enjoy a quiet space
- To visit as a main tourist attraction



### Preferred communication channels from NLA



### Important ways of engaging with or expressing culture through...





### DEMOGRAPHICS

Age	25-49 years
Gender	66% Male
Residence	Average
Education	Bachelors or postgraduate
Work status	Employed full-time
Country of birth	60% Australia, others are: India, Nepal and UK

### HOUSEHOLD

Composition	Parents
Income	\$113k
Language	83% English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning or education
- 3 Visit an exhibition
- 4 Browse or read newspapers and magazines

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- For general entertainment / leisure
- To attend a specific event
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Should reflect the diversity of cultures present
- Are important for education



### TOP 2 GLAM ONLINE DRIVERS

- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **81%**

### AWARENESS AND ENGAGEMENT



NLA

Know a lot about



High level of trust in



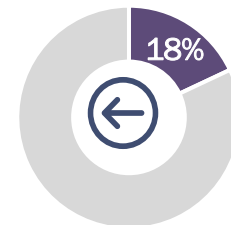
Promoters



Catalogue awareness



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS



### MAIN INTERESTS

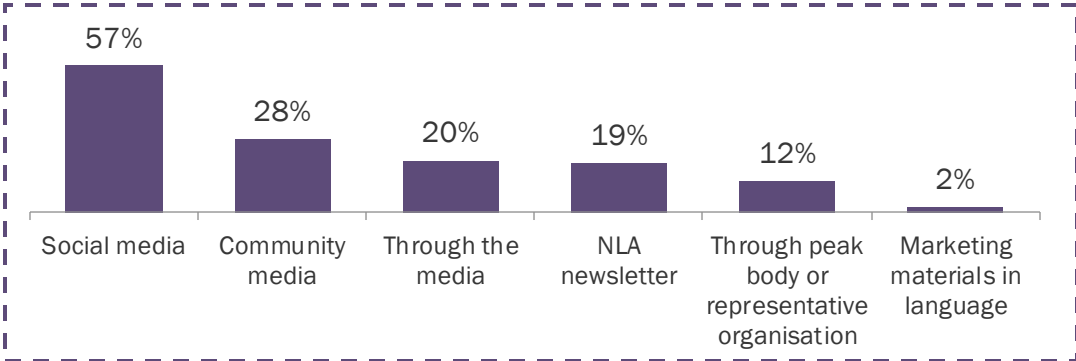
- Free exhibitions
- Stories

### VISITATION DRIVERS

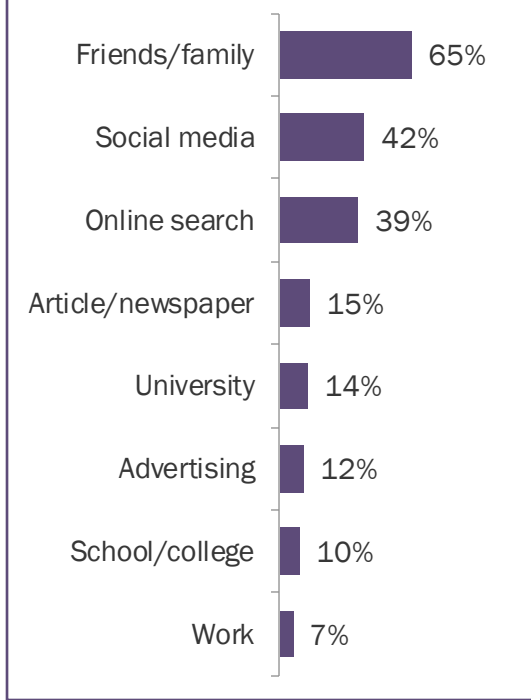
- To educate / provide an experience for my family / friends
- To enjoy a quiet space
- To educate myself/learn something generally
- To socialise with others



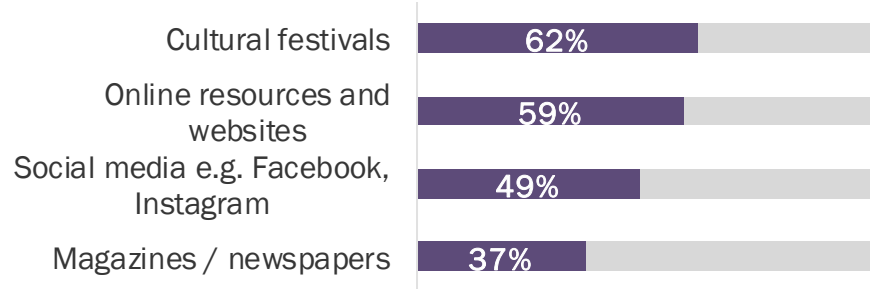
## Preferred communication channels from NLA



## CALD audience find out about cultural activities through...



## Importance of engaging with or expressing culture...





### DEMOGRAPHICS

Age	35-49 years
Gender	59% Female
Residence	Metropolitan, Sydney
Education	Bachelors or postgraduate degree
Work status	Employed full-time
Country of birth	67% Australia, others are: UK, India, New Zealand

### HOUSEHOLD

Composition	Parents 
Income	\$115k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning or education
- 3 Visit an exhibition
- 4 Browse or read newspapers and magazines

### TOP 4 GLAM DRIVERS

To visit a specific exhibit or exhibition	For general entertainment / leisure
To educate myself/learn something generally	To attend a specific event

### TOP 2 GLAM INSTITUTIONS ...

Are important for education  
Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

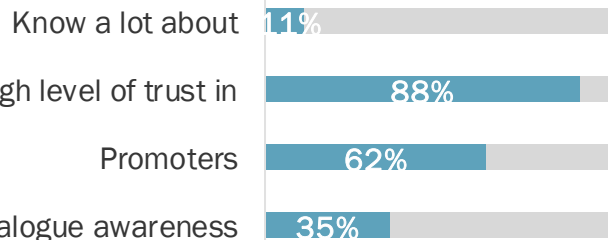
Easier to browse digitally  
Greater variety of resources online

Glam institutions are for people like me **88%**

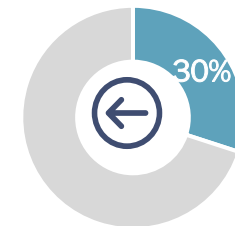
### AWARENESS AND ENGAGEMENT



NLA



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **99%**

**MAIN INTERESTS**  
Free exhibitions  
Stories

### VISITATION DRIVERS

- To educate myself/learn something generally
- To visit a specific event
- To visit as a main tourist attraction
- To visit a specific exhibit



### DEMOGRAPHICS

Age	50+ years
Gender	67% Female
Residence	Regional areas, NSW
Education	TAFE
Work status	No skew
Country of birth	Australia

### HOUSEHOLD



Composition	Average
Income	\$77k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning or education
- 3 Browse or read newspapers and magazines
- 4 Visit an exhibition

### TOP 4 GLAM DRIVERS

- To visit a specific exhibit or exhibition
- To educate myself/learn something generally
- For general entertainment / leisure
- To attend a specific event

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

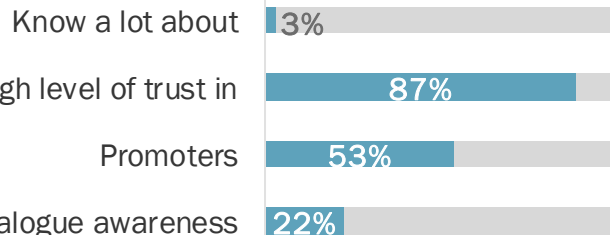
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **85%**

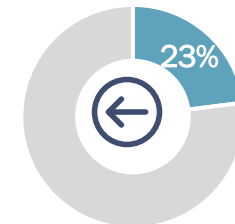
### AWARENESS AND ENGAGEMENT



NLA



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **97%**

MAIN INTERESTS  
Free exhibitions  
Family History

### VISITATION DRIVERS

- To educate myself/learn something generally
- To visit a specific exhibit
- To educate/provide an experience for family/friends
- For general entertainment/leisure



### DEMOGRAPHICS

Age	25-49 years
Gender	Female
Residence	Average
Education	Bachelors or TAFE
Work status	No skew
Country of birth	Australia

### HOUSEHOLD

Composition	 Average
Income	\$85k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning or education
- 3 Visit an exhibition
- 4 Use the cafe or restaurant

### TOP 4 GLAM DRIVERS

- To visit a specific exhibit or exhibition
- To educate myself/learn something generally
- For general entertainment / leisure
- To attend a specific event

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

- Easier to browse digitally
- Greater variety of resources online

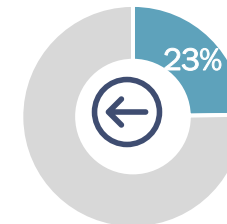
Glam institutions are for people like me **86%**

### AWARENESS AND ENGAGEMENT



- Know a lot about NLA **6%**
- High level of trust in Promoters **85%**
- Catalogue awareness **57%**
- 26%**

### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **98%**

MAIN INTERESTS  
Free exhibitions  
Collections

### VISITATION DRIVERS

- To educate myself/learn something generally
- To visit a specific exhibit
- To visit a specific event
- To visit as a main tourist attraction



### DEMOGRAPHICS

Age	50 + years
Gender	60% Female
Residence	Small skew regional
Education	TAFE
Work status	Retired
Country of birth	Australia

### HOUSEHOLD

Composition	 Couple living without children
Income	\$75k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning or education
- 3 Browse or read newspapers and magazines
- 4 Visit an exhibition

### TOP 4 GLAM DRIVERS

- For general entertainment/leisure
- To visit a specific exhibit or exhibition
- To educate myself/learn something generally
- To attend a specific event

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history

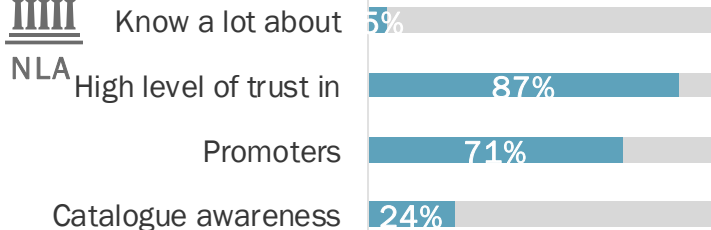


### TOP 2 GLAM ONLINE DRIVERS

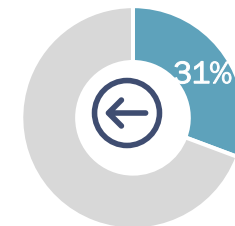
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **84%**

### AWARENESS AND ENGAGEMENT



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **97%**

**MAIN INTERESTS**  
Free exhibitions  
Family History

### VISITATION DRIVERS

- To visit a specific exhibit
- To educate myself/learn something generally
- For general entertainment leisure
- To visit as a main tourist attraction





### DEMOGRAPHICS

Age	Average
Gender	Male
Residence	Average
Education	Bachelors degree
Work status	Employed full-time
Country of birth	Australia

### HOUSEHOLD

Composition	Single
Income	\$92k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 General learning / education
- 3 Browse or read newspapers and magazines
- 4 Visit an exhibition

### TOP 4 GLAM DRIVERS

To educate myself / learn something generally	For general entertainment / leisure
To visit a main tourist attraction	To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

Are important for education  
Safeguard / preserve Australia's cultural history



### TOP 2 GLAM ONLINE DRIVERS

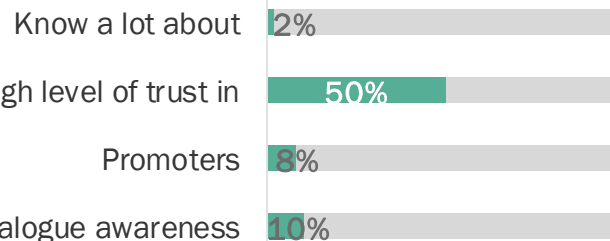
Easier to browse digitally  
Greater variety of resources online

Glam institutions are for people like me **45%**

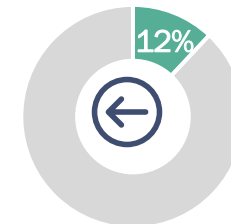
### AWARENESS AND ENGAGEMENT



NLA



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **65%**

### MAIN INTERESTS

Family history  
Free exhibitions

### VISITATION DRIVERS

- To enjoy a quiet space
- For general entertainment/leisure
- To visit as a main tourist attraction
- To visit a specific event



### DEMOGRAPHICS

Age	Average
Gender	Female
Residence	Average
Education	Bachelors degree or TAFE
Work status	Homemaker or employed part time
Country of birth	Australia

### HOUSEHOLD

Composition	Parents
Income	\$84k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning / education
- 3 Use the cafe or restaurant
- 4 Visit an exhibition

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- For general entertainment / leisure
- To attend a specific event
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history

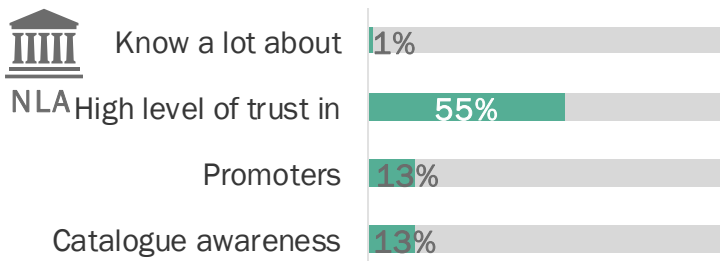


### TOP 2 GLAM ONLINE DRIVERS

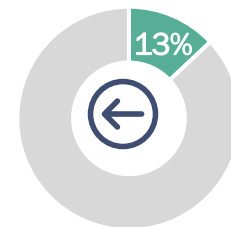
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **40%**

### AWARENESS AND ENGAGEMENT



### TROVE AWARENESS



### INTEREST IN THE NLA



- #### MAIN INTERESTS
- Family history
  - Free exhibitions

### VISITATION DRIVERS

- To educate myself/learn something generally
- For general entertainment/leisure
- Educate/provide an experience for family/friends
- To visit a specific event



### DEMOGRAPHICS

Age	25-39
Gender	57% Male
Residence	Metro areas, Sydney
Education	Bachelors or Postgraduate degree
Work status	Employed full time
Country of birth	Australia

### HOUSEHOLD

Composition	 Parents
Income	\$107k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning / education
- 3 Research for work, school or university
- 4 Visit an exhibition

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- For general entertainment / leisure
- To attend a specific event
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history

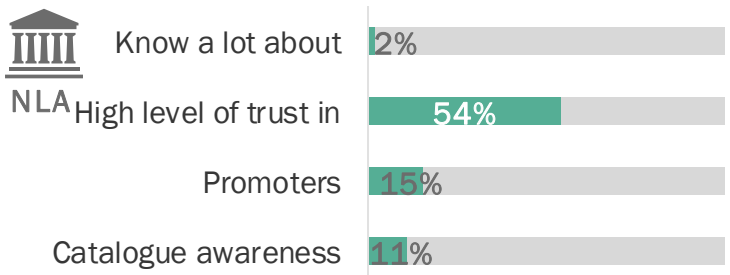


### TOP 2 GLAM ONLINE DRIVERS

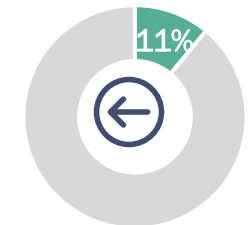
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **47%**

### AWARENESS AND ENGAGEMENT



### TROVE AWARENESS



### INTEREST IN THE NLA



**MAIN INTERESTS**  
Free exhibitions  
Family history

### VISITATION DRIVERS

- For general entertainment/leisure
- To educate myself/learn something generally
- To educate/provide an experience for family/friends
- To enjoy a quiet space



### DEMOGRAPHICS

Age	18-34
Gender	71% Male
Residence	Metro areas, Melbourne, Perth
Education	Below year 12
Work status	Employed full time
Country of birth	Australia

### HOUSEHOLD

Composition	Parents
Income	\$94k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for general learning / education
- 3 Research for work, school or university
- 4 Use the cafe or restaurant

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- To visit a main tourist attraction
- For general entertainment / leisure
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Should reflect the diversity of cultures present



### TOP 2 GLAM ONLINE DRIVERS

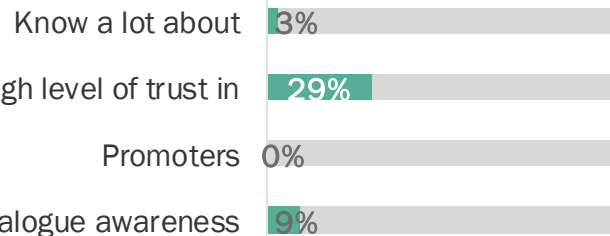
- Easier to browse digitally
- Greater variety of resources online

Glam institutions are for people like me **35%**

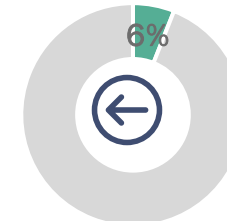
### AWARENESS AND ENGAGEMENT



NLA



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **51%**

**MAIN INTERESTS**  
Free exhibitions  
Family/kids events

### VISITATION DRIVERS

- To enjoy a quiet space
- For general entertainment/leisure
- To educate myself/learn something generally
- To educate/provide an experience for family/friends



### DEMOGRAPHICS

Age	25-39 years
Gender	53% Male
Residence	Metro areas, Adelaide, Perth
Education	Bachelors degree
Work status	Employed full-time
Country of birth	Australia

### HOUSEHOLD

Composition	Parents
Income	\$107k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Research for work, school or university
- 3 Research for general learning or education
- 4 Use the cafe or restaurant

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- For general entertainment / leisure
- To visit a main tourist attraction
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history

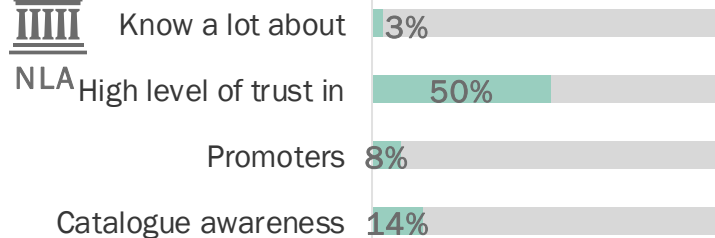


### TOP 2 GLAM ONLINE DRIVERS

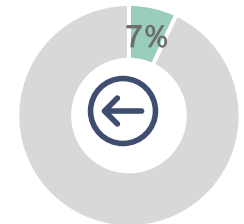
- Easier to browse digitally
- Too much effort to go to a physical venue

Glam institutions are for people like me **30%**

### AWARENESS AND ENGAGEMENT



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **52%**

MAIN INTERESTS  
Family/kids events  
Family history

### VISITATION DRIVERS

- To educate myself/learn something generally
- To visit as a main tourist attraction
- To study for work, school or university
- To look at collections /books



### DEMOGRAPHICS

Age	50+ years
Gender	Average
Residence	Regional, QLD
Education	TAFE or technical
Work status	Employed part-time or unemployed
Country of birth	Australia

### HOUSEHOLD

Composition	 Couple living without children
Income	\$78k
Language	English

### TOP 4 LIBRARY DRIVERS

- 1 Use books and resources
- 2 Use the cafe or restaurant
- 3 Research for general learning or education
- 4 Socialise with others

### TOP 4 GLAM DRIVERS

- To educate myself / learn something generally
- To visit a main tourist attraction
- For general entertainment / leisure
- To visit a specific exhibit or exhibition

### TOP 2 GLAM INSTITUTIONS ...

- Are important for education
- Safeguard / preserve Australia's cultural history

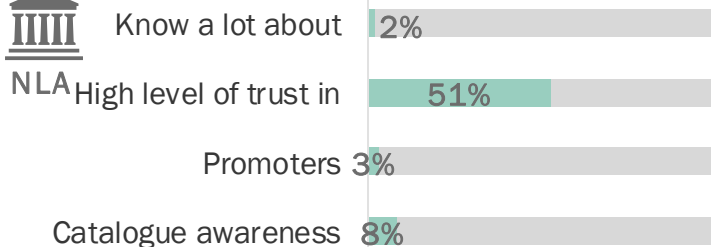


### TOP 2 GLAM ONLINE DRIVERS

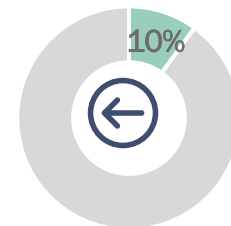
- Easier to browse digitally
- Too much effort to go to a physical venue

Glam institutions are for people like me **25%**

### AWARENESS AND ENGAGEMENT



### TROVE AWARENESS



### INTEREST IN THE NLA



OVERALL INTEREST IN NLA OFFERINGS **56%**

### MAIN INTERESTS

- Family history
- Free exhibitions

### VISITATION DRIVERS

- For general entertainment/leisure
- To visit as a main tourist attraction
- To visit the cafe
- To purchase a gift or book

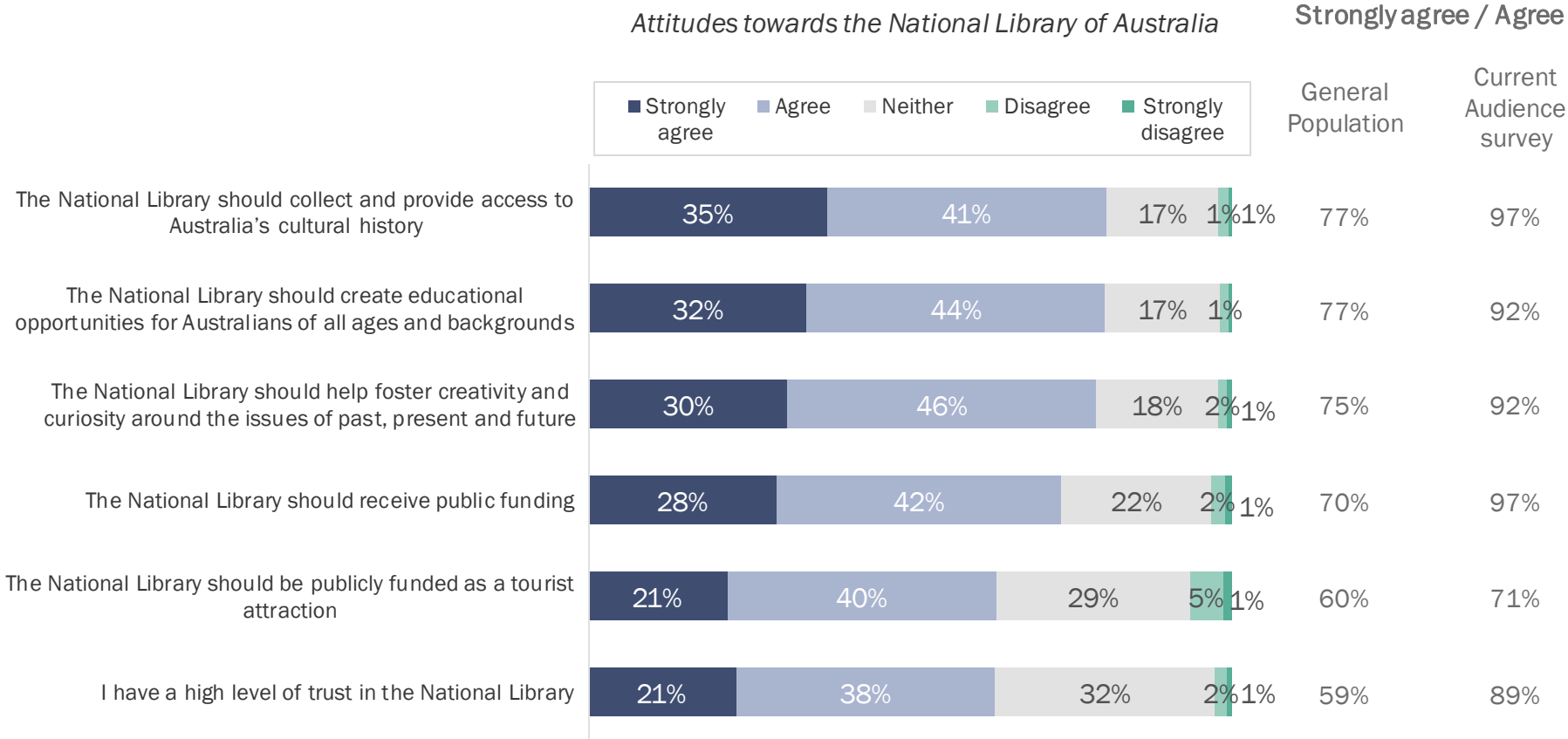
## 7.3

# Attitudes to brand role

Regardless of the audience, the National Library of Australia is supported and considered to provide important and relevant input into education and culture, as well as provide creative opportunities. Public funding of the National Library of Australia is broadly supported, although trust levels are better amongst engaged audiences than the general population.

# The National Library of Australia is supported and considered to provide a great deal to Australian society

The majority of Australians 18+ are supportive of the National Library of Australia, especially with regards to its core role to provide access to Australia’s cultural history. However only 59% of Australians 18+ have a high level of trust in the National Library of Australia, with 32% remaining neutral. This is a figure the National Library of Australia should be looking to improve on. It is no surprise that the highly engaged audience are considerably more supportive with nearly all regarding the National Library of Australia as a great institution across all core functions (culture, education, trust).

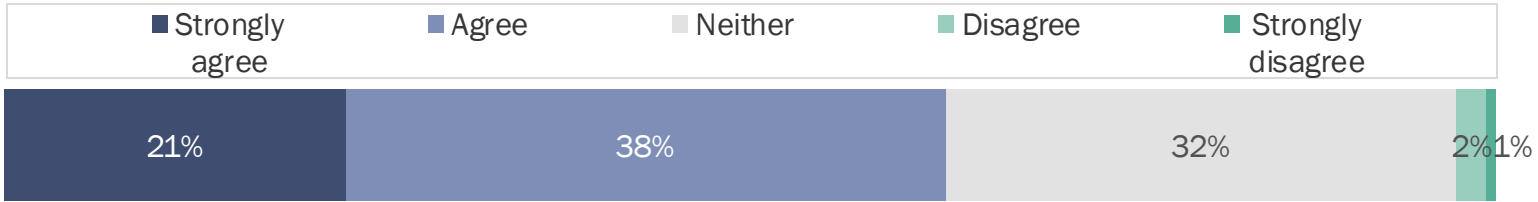




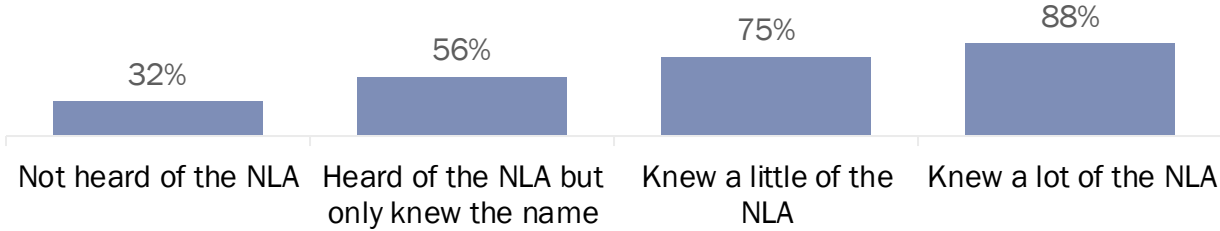
# 3 in 5 Australians have a high level of trust in the National Library of Australia, particularly those who are most familiar with the institution

Increasing knowledge about what the National Library will increase levels of trust with the institution

*I have a high level of trust in the National Library of Australia – general population*



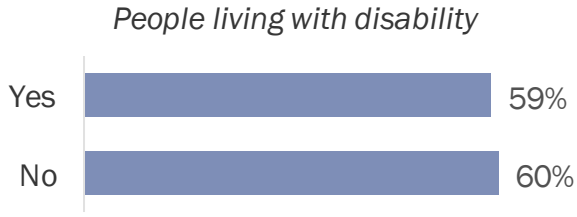
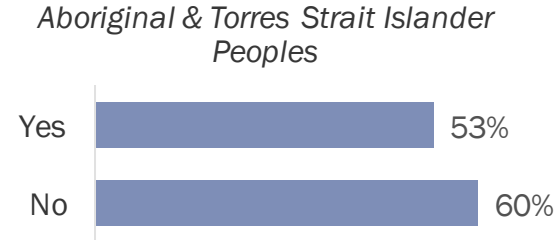
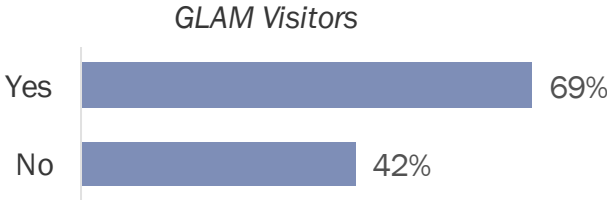
*I have a high level of trust in the National Library of Australia - strongly agree / agree*



Trust in the National Library of Australia increases with knowledge of the institution

# Trust in the National Library of Australia is also high amongst GLAM Visitors and Culturally and Linguistically Diverse Australians

*I have a high level of trust in the National Library of Australia  
- strongly agree / agree*



## 7.4

# Brand positioning

Preserving ‘our national story’ is seen as the National Library of Australia’s core role and remit and is the unique selling point for the brand. However, the tone of delivery is very important and needs to be inclusive, reflective and feel relevant for all Australians.

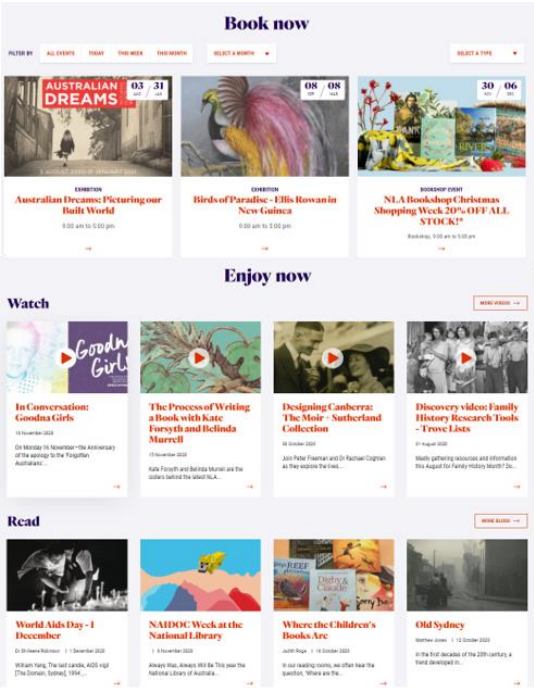
# Focus groups were used to provide feedback on positioning the brand, the service offering and pathways into connecting with what the National Library of Australia has to offer

## Brand messages

Our role is to collect, preserve and share a national collection, documenting Australia's history and its people.	Our vision is to connect with all Australians with national collections, enriching conversations about who we are and our place in the world.
Australia's history is a rich and diverse tapestry of geographical, cultural and social change. We believe that by learning from our past, we can instruct and inform the future.	Come find yourself in your national collection.  Let us help you tell your story.  Our national collection, your story.
We exist to build the nation's memory.	The joy of discovery.

Stimulus was generated from the National Library of Australia Brand Book and Communications & Digital Community Strategy. Group participants were asked to evaluate and discuss the ideas and phrases used.

## What's On – Website



Group participants were asked to visit the website to review the resources and activities available at the National Library of Australia. During discussions respondents also shared their own experiences, if any of visiting and using the services.

## List of services

Research Guides
Interlibrary Loan
eResources
Trove
Ask a Librarian
Library Catalogue
Events
Friends of the Library
Library Card
Family History Services
Exhibitions
Collections

Group participants were asked to nominate services of most interest to them and discuss what the focus of the National Library of Australia's communication should be.

## Feedback suggests Australians support the National Library of Australia's core role as preserving Australia's history and find the notion of a national library important

It's unfortunate because I would have loved to ... have gone if I realized, if I had known that the actual Library was there [in Canberra] I would have gone straight to it because I'm a history buff. *New audience Focus Group.*

I just love the thought of the vision of connecting all Australians with and enriching all their lives with the collections and figuring out who we are and where we are in the world. Globalization is huge and the internet is bringing everyone together. And the ability to do that is what our National Library should be doing as one of the national institutions. *New audience Focus Group.*

I think that the libraries in and around the country should be advertising this, because if I haven't heard of this [National Library] and I go to the library regularly. It's important to know it's there. *New audience Focus Group.*

I had heard of it, but yeah, I was quite surprised getting onto their website and doing some pre-readings for this focus group, because there was a lot of resources and it's very interesting stuff. *New audience Focus Group.*

It's really important to have a national library of course its going to focus on national history, that's what its role it. We need an institution to do that. *New audience Focus Group.*

***However the tone and delivery of this core remit and message is very important***

# Communication of the National Library of Australia's role needs to be inclusive, reflective and feel relevant for all Australians

## Brand messages – What the Library does

<p>Our role is to collect, <b>preserve and share a national collection</b>, documenting Australia's history and its people.</p>	<p>Our vision is to <b>connect with all Australians</b> with national collections, <b>enriching conversations</b> about who we are and our place in the world.</p>
<p>Come find yourself in your national collection. Let us help you <b>tell your story</b>. Our national collection, your story.</p>	<p>Australia's history is a rich and <b>diverse tapestry</b> of geographical, cultural and social change. We believe that by <b>learning from our past</b>, we can instruct and inform the future.</p>
<p>We exist to build the nation's memory.</p>	<p>The joy of discovery.</p>

## Positioning what the National Library of Australia does

- The National Library of Australia's role and remit needs to sound inclusive
- Core communication around collating and preserving history need to embrace all Australians, and accept and reflect different people's views and perspectives of history. Phrases like 'diverse tapestry' naturally appeal
- It is also important to sound reflective versus jingoistic
- Many supported reference to phrases such as 'enriching conversations' and 'our place in the world' feeling these suggest that Australians look outward, not inward to know who we are
- National representation is vital but needs to be about **our story and my story**, not the nation's, not the National Library of Australia's
- 'Building the nation's memory' doesn't allow ownership and was rejected by many
- *Joy of discovery* has considerable appeal but is too generic for the core positioning and plays a different role

## 7.5

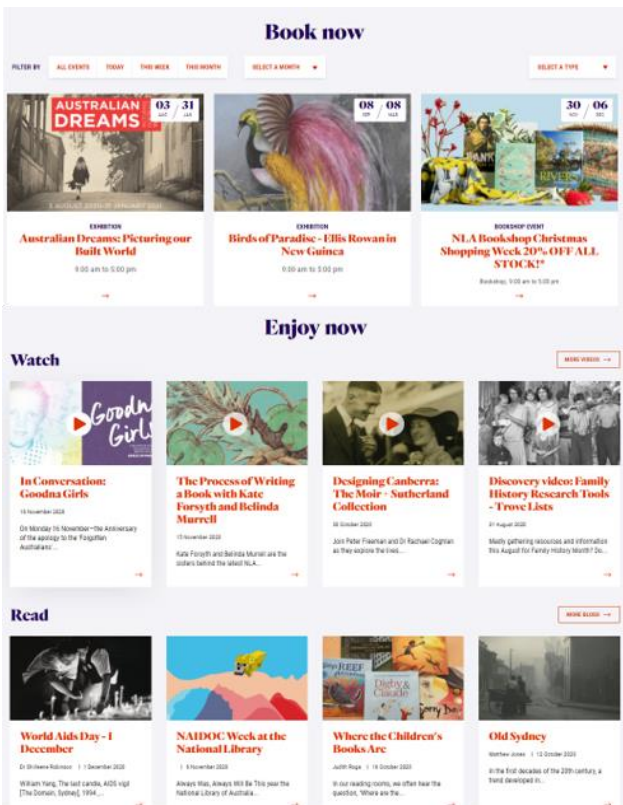
# Products and services

The National Library of Australia has an extensive range of products, services and activities on offer. Whilst this is appealing, audiences are overwhelmed where the offer is not targeted or focused, and find current pathways too difficult to navigate.

To be successful the National Library of Australia needs to pair products/services with motivations to engage and tailor offers to specific target audiences, including language, tone and positioning of the product and provide pathways in keeping with the segment the library is targeting.

# In looking at resources and activities on offer using the website new audiences feel overwhelmed and want clarity around what the National Library of Australia offers

## What's On



The website needs clarity and easy pathways to services that visitors are looking for or that might be of interest

- A visit to the website What's On did not help new audiences understand how they would use or connect with the services on offer
- Therefore although many saw something of interest (an exhibition, an author talk), without clarity, priority or guidance the offer felt overwhelming
- The core role / relevance of the National Library of Australia is not clear – and there was a lack of focus on collections and resources

I get the feeling that the site is designed for people who already know what they're looking for, it's for the people who would have been there before, who know what the service is, who know how to look for it. But if you just came past that site, there's nothing to engage you. *New audience Focus Group.*

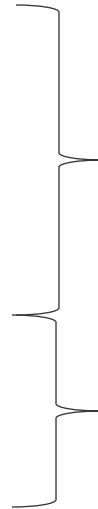
**Clear pathways into what the National Library of Australia offers are required and currently the website is not working well**



# According to new and existing audiences, the National Library of Australia should focus on its collections and core reference library resources both on-site and online

## Focus Group participants rated top 3 services

Library collections resources (46)	Rated 1, 2 or 3
Collections	15
Trove	15
eResources	9
Library Catalogue	7
Exhibitions / events (32)	
Exhibitions	16
Events	16
Other	
Family History Services	5
Research Guides	3
Ask a Librarian	3
Friends of the Library	1
Interlibrary Loan / Library Card	



## Core reference library resources were considered the most relevant focus for the National Library of Australia

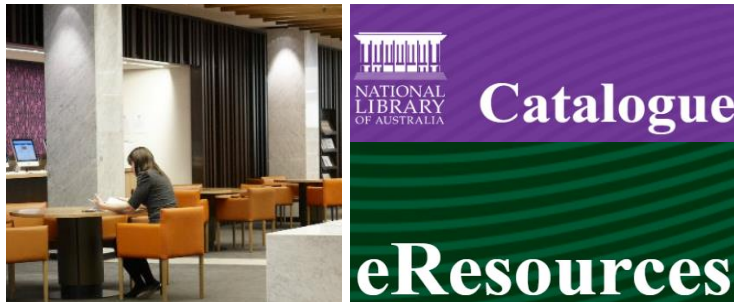
- Collections, Trove, eResources and the library's catalogue are most heavily supported and what people were most interested in. These are unique to the National Library of Australia and remain its unique selling point
- Not surprisingly collections were more likely to be nominated by those in Canberra, whereas national participants were more likely to nominate Trove or eResources given these can be accessed online
- Resources of this nature being offered free is a real benefit, especially for students requiring considerable access. One respondent noted the paywall put up by newspapers in accessing historical content.

## Exhibitions and events are also popular and particularly supported by those less interested in library resources

- Exhibitions and events were also supported and confirmed as potentially an easier, more obvious reason to visit the National Library of Australia

***The National Library of Australia's collections are extensive, credible and potentially unrivalled and are the unique selling point for the brand***

Having said that, other services and activities can be used to attract and target different users, driven by different motivations, usage occasions and reasons to engage



### Core services

#### A reference library

HISTORICAL  
STORIES  
BOOKS  
COLLECTIONS  
CATALOGUE  
TROVE  
LIBRARIANS  
QUIET SPACES

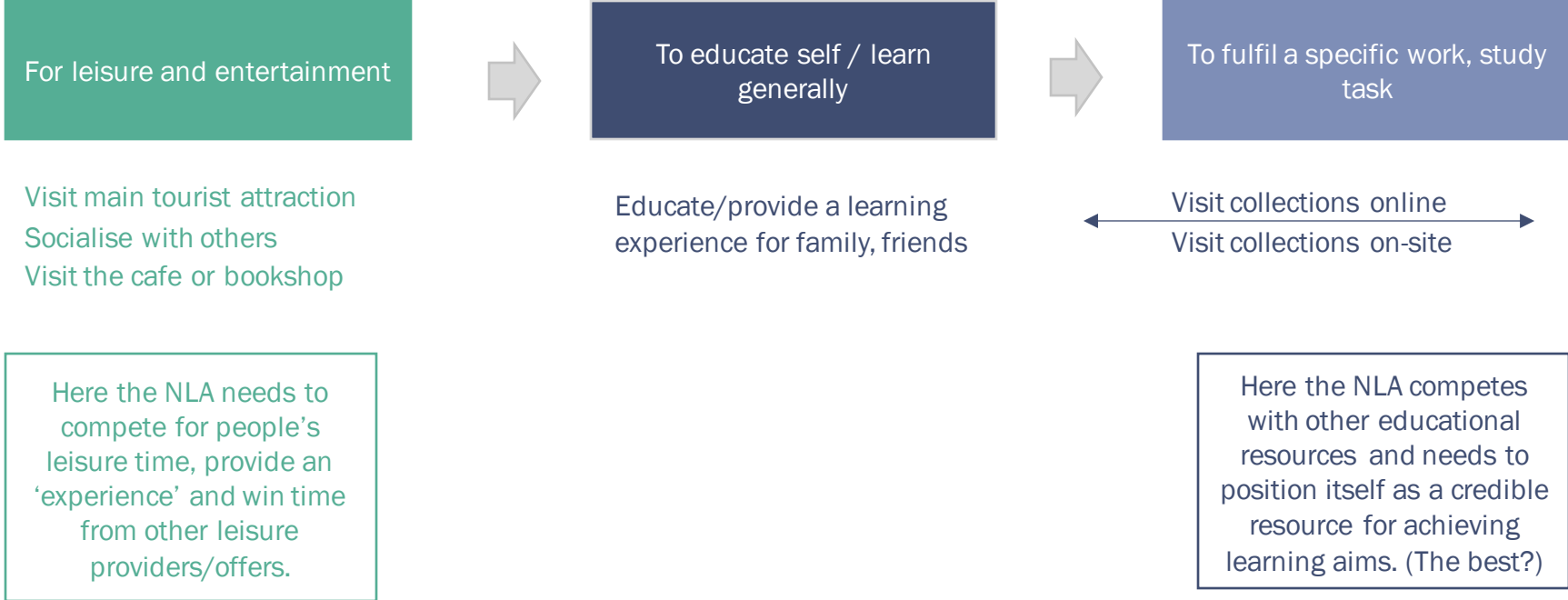
Fits well offered both on-site  
and online

### Other services, activities

CAFE  
BOOKSHOP  
EXHIBITS  
EVENTS  
SOCIAL SPACES

Feel better suited to an on-site  
offer

# Use the three core drivers to guide appropriate marketing activities for the National Library of Australia and match to the mix of resources, services and activities



NOT MAPPED AS DEPEND ON THE EXPERIENCE : Visit an exhibition / Attend an event / Enjoy a quiet space

Qualitative feedback

Focus Group discussions reveal that even when visiting GLAM institutions to educate self/learn something generally the time spent needs to be enjoyable and offer an experience as it is something people are choosing to do in their free time so also has a leisure component to it.

Core library resources are an easy fit with study/work tasks however, the challenge is to make these resources entertaining and easy to access for leisure and learning

CORE DRIVERS

Leisure/Entertainment & Social

General learning

Specific study/ work tasks

LIBRARY SERVICES

Core resources

A reference library

Online  
On-site

- HISTORICAL STORIES
- BOOKS
- COLLECTIONS
- CATALOGUE
- TROVE
- LIBRARIANS
- QUIET SPACES



**Challenge**

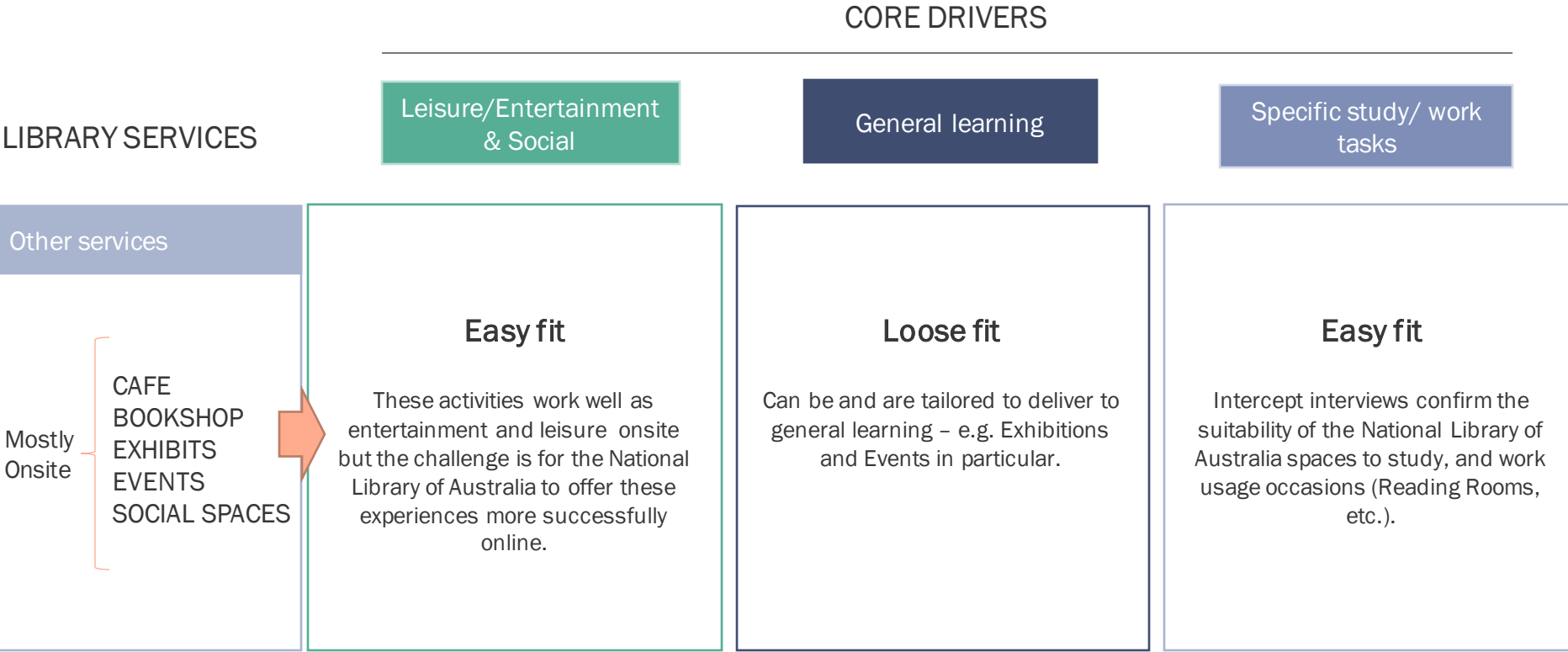
Whilst Australians are supportive of a national reference library that collects and collates information, there is a disconnect with how or why they might personally engage with these services. Feedback suggests that reference libraries and the core resources of the National Library of Australia in particular fit well with formal learning tasks. Current pathways explored in focus groups via the website are overwhelming, lack clarity and further alienate first time visitors (only 30% visit reference libraries).

**Easy fit**

Education and work tasks fit well with the National Library of Australia's core resources and collections both on-site and online. However the challenge is to raise awareness especially of the online offer and create clear and easy pathways.

*Currently Australians struggle to see how they would engage with core services for leisure and entertainment*

Other library services fit well with all three drivers, however the challenge here is to consider how to replicate these experience via online channels as well as raise awareness



*Currently these services deliver well on-site but haven't transferred to the online environment*

## 7.6

# Recommendations

Ten key recommendations have been identified from this research, in addition to a brand positioning clarification and six example opportunities to consider based on the National Library of Australia's mixed product offer and the consumer drivers identified in this research.

# Overall recommendations to emerge from this research

1. Raise the profile and awareness of the National Library of Australia amongst all Australians.
  - This is first and foremost about an information campaign to ensure all Australians know the National Library of Australia exists and broadly its role and remit. From focus groups there was support for campaigns that 'get people talking' about the library as most people find it interesting that it is there, and surprising that they don't know it exists.
  - More targeted and specialist messages can then be directed at discrete audiences.
2. Commit to a clear brand positioning.
  - Preserving 'our national story' is seen as the National Library of Australia's core role and remit and is the unique selling point for the brand. Tone of delivery is very important and needs to be inclusive, reflective and feel relevant for all Australians. National representation is vital but also needs to be about 'our story' and 'my story', not the nation's and not the National Library of Australia's.
  - Consider the value of creating a personal or emotional connection with the library's resources. One powerful example of this from the research was in relation to personalising 'Australia's history' and 'your family history' in particular. There will also be other ways to achieve this.
3. Reduce barriers around being a reference library as this can raise questions for everyday Australians about why and how they might want to engage with library resources.
  - Communication and marketing messages should address barriers by positioning the library as a place for leisure and entertainment as well as general learning e.g. something you would choose to do in your leisure time.
  - GLAM activities are one way to achieve this, but there is more value in determining how to make core resources/collections accessible (given these are the unique selling points for the brand).

## Overall recommendations to emerge from this research

4. The core product focus should be on the unique collections and reference library resources offered by the National Library of Australia. These are not only extensive, credible and potentially unrivalled but also supported by staff, even online.
  - It is vital to present reasons to engage with these resources that create interest, relevance and challenge the perception that libraries are only for research and study.
5. Use market segments/consumer personas, market drivers and usage occasions to tailor and refine marketing campaigns.
  - Pair products/services with motivations to engage.
  - Tailor offers and messages to specific target audiences, including language, tone and positioning of the products on offer. Everyday Australians need everyday accessible language and messages, and ways to engage with the library that are familiar and recognisable.
  - Provide pathways in keeping with the segment the library is targeting (use channel and media preferences).
6. Review current pathways.
  - The website is not effective and is not easily directing users to services / resources of interest. It needs a navigational overhaul based on what has been learnt about motivations and consumer segments.
  - Specific services generated minor feedback in the current research and potentially need further investigation (e.g. How easy is the online catalogue to use? Are the wealth of resources available on Trove easy to find?).



## Overall recommendations to emerge from this research

7. Awareness, access and use of eResources need to be maximised. There is a natural fit between digitised collections / reference library resources and online delivery - the National Library of Australia's online catalogue, and Trove in particular. These are interesting and important to the brand.
  - Initial feedback suggests that significant SEO investment is required to increase the profile of the National Library of Australia's online catalogue and Trove resources. (Qualitative feedback suggests that these are not favoured in Google searches with competitor materials much more likely to appear on page one).
  - Young Australians aged 18-34 years are a particularly important target group here as they are more digitally engaged with online literary and cultural resources, and show some preference for this channel in relation to GLAM content and resources.
8. Aboriginal and Torres Strait Islander peoples require a dedicated approach to materials and resources representing their cultural group. This requires staff representation for Aboriginal and Torres Strait Islander peoples and community consultation (in community locations) to ensure cultural representation is accurate and respectful.
9. For culturally and linguistically diverse Australians, the National Library of Australia should consider tapping into existing, and often extensive, community networks which already preserve and share cultural histories. These networks are often supported by a local library.
10. People living with disability need equal access to on-site and online resources as much as possible. Engage directly with industry stakeholders to evolve current approaches and bring the National Library of Australia in line with best practice.

# Brand positioning recommendation

What we do

Our role is to collect, preserve and share a national collection documenting Australian's history and its people including the digitisation of materials and national access through online resources.

*The National Library of Australia needs to raise awareness of its core service/remit and unique selling point.*

Emotional connection

Our vision is to connect with all Australians with national collections enriching conversations about who we are and our place in the world. **Come in and find yourself in your national collection.**

*It also needs to connect emotionally with audiences ensuring they know this is their story / belongs to, and is relevant to them.*

Inspiration to engage

The joy of discovery

*Inspiring people to get involved is also important and 'discovery' is a way to do this. Some segments will want to be more task-orientated; others will want easy and accessible 'discovery'.*

In terms of sector positioning, the National Library of Australia operates as a reference library as well as competing with other institutions in the GLAM sector. The library should also consider itself as an online information resource, competing against other similarly placed resources (e.g. Google Scholar at the upper end and consumer resources such as newspapers and magazines at the lower end).

# Example of key opportunities: core resources

## CORE DRIVERS

### LIBRARY SERVICES

Leisure/Entertainment  
& Social

General learning

Specific study/ work  
tasks

#### Core Resources

A Reference Library

HISTORY  
STORIES  
BOOKS  
COLLECTIONS  
CATALOGUE  
TROVE  
STAFF  
QUIET SPACES



#### Opportunity 2

Trigger interest in the extensive collection of Australian history that might interest them - stories, voices, histories - about you, your family, our history. Create an **emotional connection** with Australians.

Establish relevance and pathways in

#### Opportunity 3

When Australians ask questions online ('what is...', 'where is...' 'how is...'), especially if these are Australian questions an NLA resource should be listed as one possible answer EVERY TIME.

Invest in SEO dominance

#### Opportunity 1

Huge opportunity to raise online profile as most credible 'academic' resource, with staff support. Deliver single-minded to this usage occasion. Undiluted academia.

Raise online presence and dominate, leverage USP

# Example of key opportunities: other services

## CORE DRIVERS

### LIBRARY SERVICES

Leisure/Entertainment  
& Social

General learning

Specific study/ work  
tasks

#### Other services

Mostly  
On-site

CAFE  
BOOKSHOP  
EXHIBITS  
EVENTS  
SOCIAL SPACES

#### Opportunity 4

Offer more of these experiences successfully online. The NLA Bookshop shows most immediate potential.

Better replicate experiences online

#### Opportunity 5

EVENTS/EXHIBITS should target specific segments vs. everybody. 18-34 year olds are a subsegment that should be an online focus. Use the right language, tone, formality as well as style of exhibit/event.

Tailor offer to new audiences

#### Opportunity 6

Are there online study communities that the NLA could moderate and facilitate. Ask a Librarian, Digital Classroom are unique, high touch service.

Use network to create communities



# Appendices



# Research Background and Objectives

The National Library of Australia (NLA) commissioned a program of consumer research in November 2020.

Key aims of this research were:

1. To better understand current and future or new Library audiences, their **needs, expectations and behaviours**
    - Acquire this knowledge through an evaluation of the **demographic, psychographic, behavioural** and **situational** profiles of current and future users
  2. By developing this understanding, **derive engagement strategies and opportunities** to better connect with audiences, and position the NLA as a primary national provider in the sector
    - Tailored engagement strategies based on each user segment, including digital marketing channels for Trove and digital users
  3. Create a benchmark of audience satisfaction and the NLA's performance, to determine key areas of development
- Research also aimed to provide voice to key diversity audiences, who face unique challenges and barriers, and thus may see underutilisation of NLA services. This includes collection of **multicultural insights** from Aboriginal and Torres Strait Islander peoples and CALD.
  - Key Outputs:
    - Benchmark of engagement, satisfaction and NLA performance
    - Consumer segmentation and personas
    - Tailored marketing and engagement strategies for each segment





# Specific aims for quantitative data collection



## 1. General population

- Online survey with a general population sample
- **Aim:**
  - Scope the size of the market
  - **Demographic analysis** – identify audience types
  - **Psychographic analysis** – understand needs, wants and expectations
  - **Prior knowledge analysis** – determine awareness of NLA and Trove
  - **Situational analysis** – understand barriers to entry and potential motivators to usage.



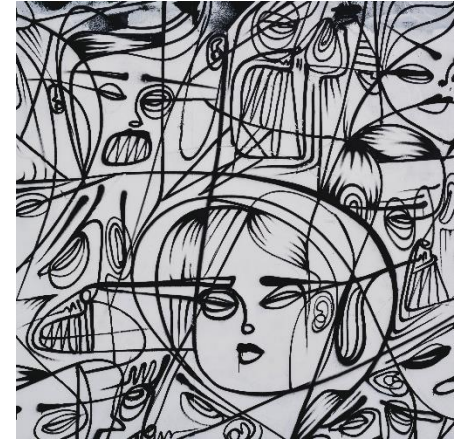
## 2. Current audience

- Online survey, conducted with NLA current audiences
- **Aim:**
  - Demographic, psychographic and situational analysis
  - **Behavioural analysis** – how users engage with the NLA
  - **Attitudinal analysis** – abstract views and attitudes towards the NLA
  - **Satisfaction benchmark** – perceived strengths and gaps of the NLA
  - Inform on **priorities and actions** as outlined in the Corporate Plan



## 3. Intercept survey

- Face-to-face intercept survey with on-site visitors
- Ensure accurate representation of **non-member users** in research
- **Aim:**
  - Covers all elements as in the member survey
  - Generate **rich, in-situ feedback** on user needs and experiences with services
  - Understand the **visitation experience**



## 4. Diversity survey

- Follow up survey with diversity groups
- **Aim:**
  - To explore attitudes and needs of diversity groups
  - Understand their needs and expectations of the NLA
  - Aboriginal and Torres Strait Islander peoples, Australians living with disability and Australians from culturally and linguistically diverse backgrounds (CALD)

# Specific aims for qualitative data collection



## 5. Focus Groups with current audience

### Aim:

- Focus groups provided a deep dive into areas and concepts covered in the user survey
  - Reasons for use, needs, expectations
  - Satisfaction with the NLA
  - Value assessment of the NLA
  - Gap discussion
- Explored customer journeys of current users, including how, where and why they became acquainted with the NLA

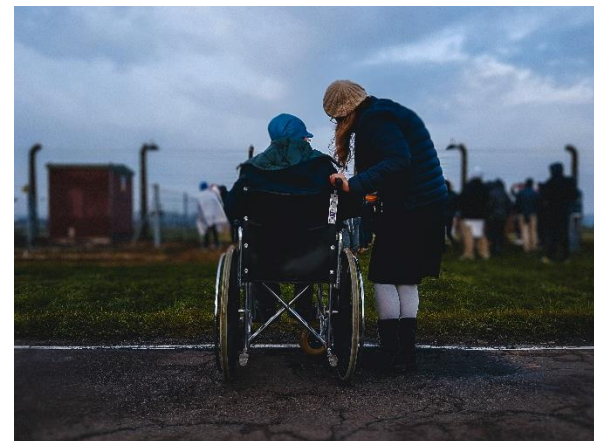


## 6. Focus Groups with new audiences

Australians who have an interest in the GLAM sector but who currently don't engage with the NLA

### Aim:

- Deep dive into how to inspire and engage this audience:
  - Potential reasons for use, needs, expectations
  - Barriers to entry
  - Value-adds that would compel engagement
  - Pre-engagement perception



## 7. Stakeholder feedback from diversity groups

Mini groups and depth interviews amongst stakeholders working in diversity sectors

### Aim:

- Determine the unique challenges faced by diversity groups
- Uncover barriers and understand needs and objectives of diversity groups
- Uncover pathways to better deliver to Aboriginal and Torres Strait Islander peoples, the CALD audience. Explore ways to improve delivery to Australians living with disability.





## Survey notes

### Weighting

- The final dataset of the General Population Survey had a national-based cell-weighting methodology applied based on region, age and gender. This ensures the final weighted sample is representative of the Australian population aged 18 years and over. The weighting profile was based on Australian Bureau of Statistics (ABS) data, which are based on the 2016 Census.

### Effect of rounding


- The sum of the individual components of a question may be different ( $\pm 1\%$ ) to the aggregated data for that question due to rounding error. The results of survey responses are reported in the figures throughout the document as percentages that have been rounded up or down to the nearest whole number.


THANK YOU




For any questions or comments, please get in touch:

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