San Mateo County Libraries

Agenda Item IV.

To:	JPA Governing Board
From:	Anne-Marie Despain, Director of Library Services
Date:	September 15, 2020
Meeting:	September 21, 2020
Re:	Resident and Library Patron Survey Results

Background

In 2014, San Mateo County Libraries worked with EMC Research to complete a research project to identify the demographic characteristics, behaviors and values of users and non-users in order to better understand and tailor library services to community needs. The resulting report was used to effectively allocate resources, strengthen our relevance to the community, and create focus for future planning efforts, including the development of a new Strategic Plan.

Working with EMC to mirror the previous approach, new surveys were designed to cover a similar set of topics as the 2014 study and updated to reflect changes since that study was completed, both in terms of the new San Mateo County Libraries' branding as well as new programs, services, and library offerings.

The project included the following components:

Survey of Residents in Library Service Area
Conduct a statistically valid survey of residents in our service area and gather information on residents' need for services and how the Library is currently filling those needs or could fill those needs in the future. The 15-minute survey conducted by telephone and online was offered in English, Chinese, and Spanish and the sample size was 632.

Survey of Library Patrons
Gather in-depth feedback from people who are most closely associated with San Mateo County Libraries and likely to be most familiar with our programs and services. This survey was conducted online among a random selection of library cardholders. This survey was also offered in English, Chinese and Spanish and the sample size was 1021.

Demographic Profile of Library Service Area
Develop a demographic profile of residents in the Library service area utilizing publicly available data sources. Given the timing and changes of the Census, this work has been postponed to 2021 or when updated Census data is available.

Focus Groups

In order to gain a deeper understanding in some areas, we have the option of requesting focus groups to engage residents in moderated discussions to glean in-depth responses, attitudes, and opinions. Focus groups would happen later this year or early next year.

Discussion

The analysis and reporting includes comparisons to the 2014 study to show relative changes over time and provides some new quantitative data. The following summarizes key findings:

Resident Survey

- San Mateo County Libraries is well-liked by the community and has a strong favorable rating.
- While residents report using the library less due to the pandemic, the majority of residents say they will return to visiting the library by the winter.
- Residents rate most service components as being important, but the highest ranked fall into two categories: borrowed materials and educational resources for the community.
- Descriptors and messaging about the library are well-received.
- The language used to describe SMCL was very effective, suggesting there are potentially multiple ways to tell a positive story about the libraries and the role SMCL plays in the local community. Given the very high trust and favorability ratings, SMCL is a voice that the vast majority of local residents will listen to.
- The research suggests that people continue to view book lending (physical or online) as the core library function. That's not to say SMCL should not continue to pursue other services and functions, but we should not lose sight of the importance of the core function of book lending.

Patron Survey

- San Mateo County Libraries continues to enjoy strong positive ratings from its patrons regarding its job performance and services.
- Patrons report using the system less due to the pandemic, although digital resources are proving to be important and well-rated.
- Patrons specifically highlight San Mateo County Libraries staff and convenience as some of the system's strengths.
- Traditional library services, like checking out materials (physical and digital) and computer/wi-fi access, are rated as the most important.

- Overall, San Mateo County Libraries is receiving job and performance ratings on par with or above those seen in 2014.

- Patrons are concerned about COVID, and many say they will not return to using library facilities until there is a vaccine or the virus is contained.

Previous results were used to inform and develop our current Strategic Plan which is set to expire in 2020. Embarking on a full strategic planning effort would require a robust outreach plan and significant resources. In 2014, a multifaceted planning process was used over a nine-month period to engage over 7,500 community members. Staff worked to design a process that looked outward and focused on community engagement and attended over 100 public outreach events to collect input. The resulting plan, approved by the Governing Board on September 14, 2015, is not only visionary and directional, but also flexible enough to respond to environmental changes over time.

Based on the current environment and strong, positive survey results, staff is recommending that the Strategic Plan be extended to 2025. The current vision, mission and strategic goals remain relevant and continue to provide a solid framework for determining priorities and providing guiding principles for the future. Using the information collected and analyzed in this study, staff could make minor adjustments for JPA Operations Committee and Governing Board approval; focus important resources to our pandemic response and restoration of library service efforts; and continue to grow and build upon the good work and success that has resonated with our residents and patrons.

Fiscal Impact

There is no fiscal impact associated with accepting this report.

Recommendation

Recommend JPA Governing Board accept the Resident and Library Patron Survey Results and provide input and direction to staff on next steps. Operations Committee members present at the September 15, 2020 meeting concurred with this recommendation.

Attachment

Survey of Library Service Area Residents and Patrons

San Mateo County Libraries

EMC research

Surveys of Library Service Area Residents and Patrons

May - July 2020

Research Program

- In 2014, EMC conducted four pieces of research on behalf of San Mateo County Libraries:
  - A survey of adult residents in the library service area
  - A survey of library patrons
  - Focus groups among residents with low or no library usage
  - A demographic report of the service area population
- In 2020, EMC has conducted a resident survey and a patron survey. Focus groups and demographic reporting are slated to happen later this year or early next year.

EMC research

Resident Survey

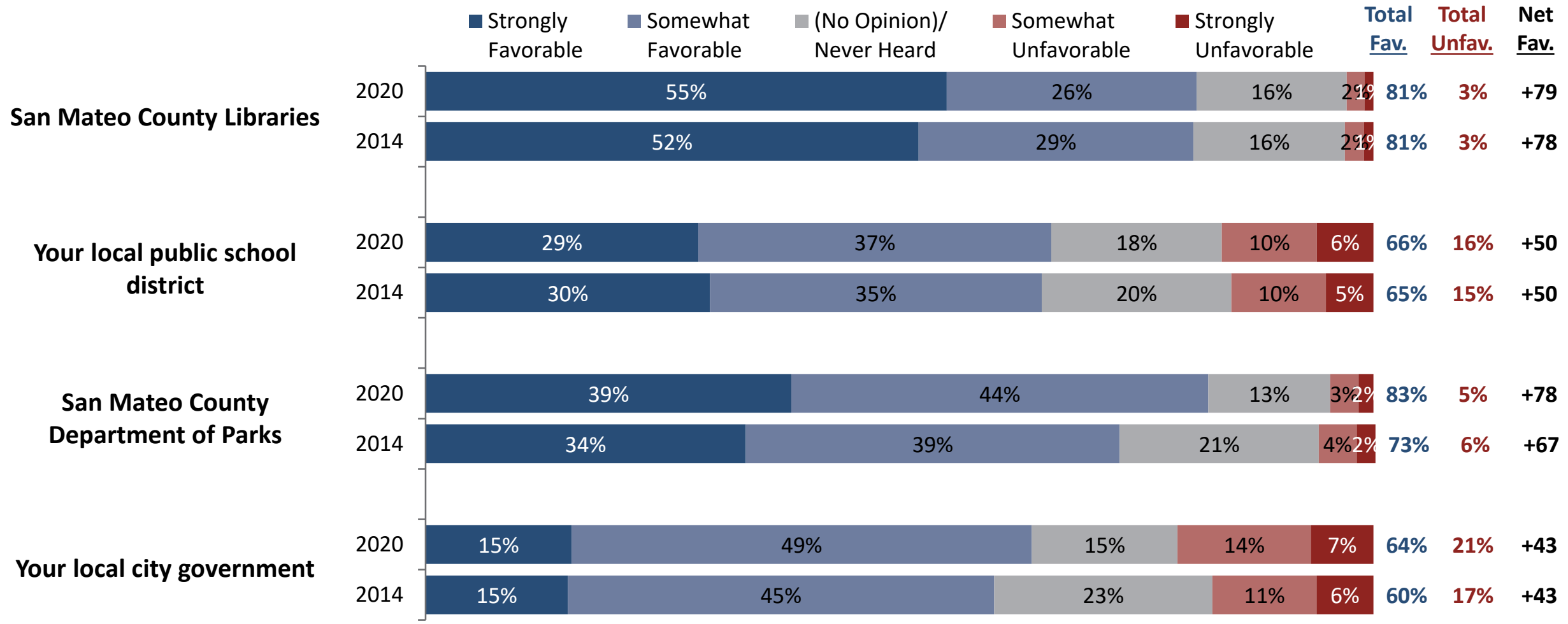
Key Findings – Resident Survey

EMC research

- San Mateo County Libraries is well-liked by the community and has a strong favorable rating.
  - The rating is steady from the last iteration of this survey, conducted in 2014.
- While residents report using the library less due to the pandemic, the majority of residents say they will return to visiting the library by the winter.
- Residents rate most service components as being important, but the highest-ranked fall into two categories: borrowed materials and educational resources for the community.
  - Checking out books and free online access to books and music ranked the highest, followed by adult literacy service, educational resources for children, and services for job seekers.
- Descriptors and messaging about the library is well-received.

Favorable Ratings Over Time

The Library has a robust positive rating, with over half of residents giving it a strongly favorable rating. Libraries, local school districts, and local governments' ratings have held steady since 2014, while County Parks have seen an increase in rating.

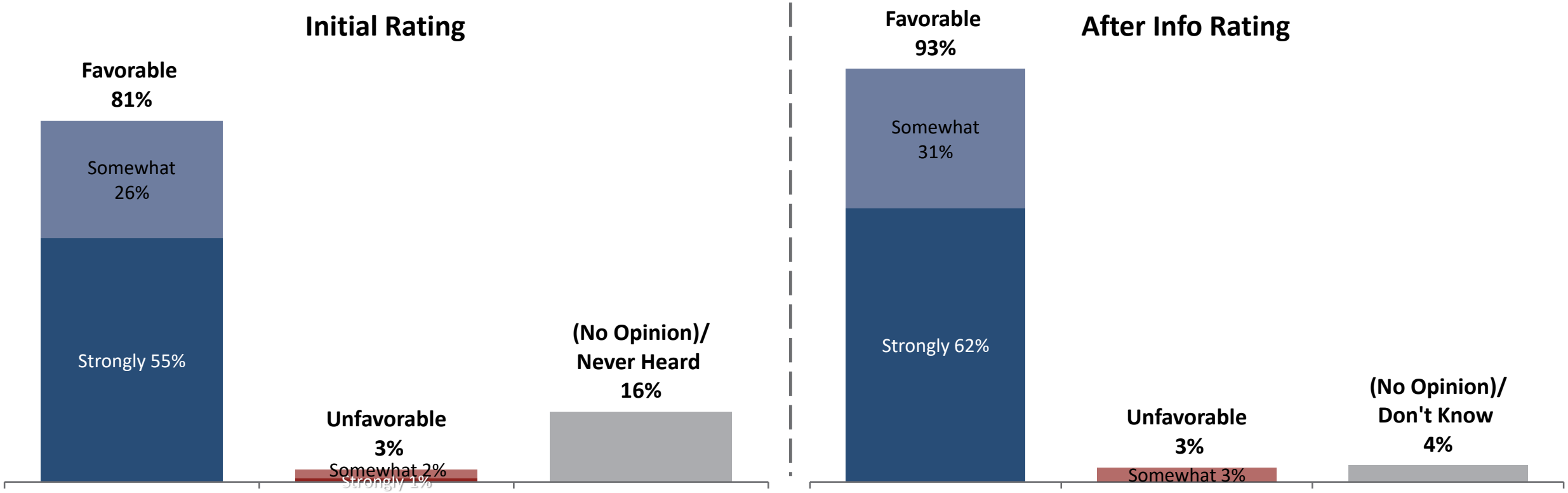


Q4-Q7. I'm going to read you a list of several people and organizations. Please tell me if you have a strongly favorable, somewhat favorable, somewhat unfavorable or strongly unfavorable opinion of each one. If you have never heard of one, please just say so.

Favorability After Info

More than nine out of ten residents rate the library system favorably after hearing additional information.

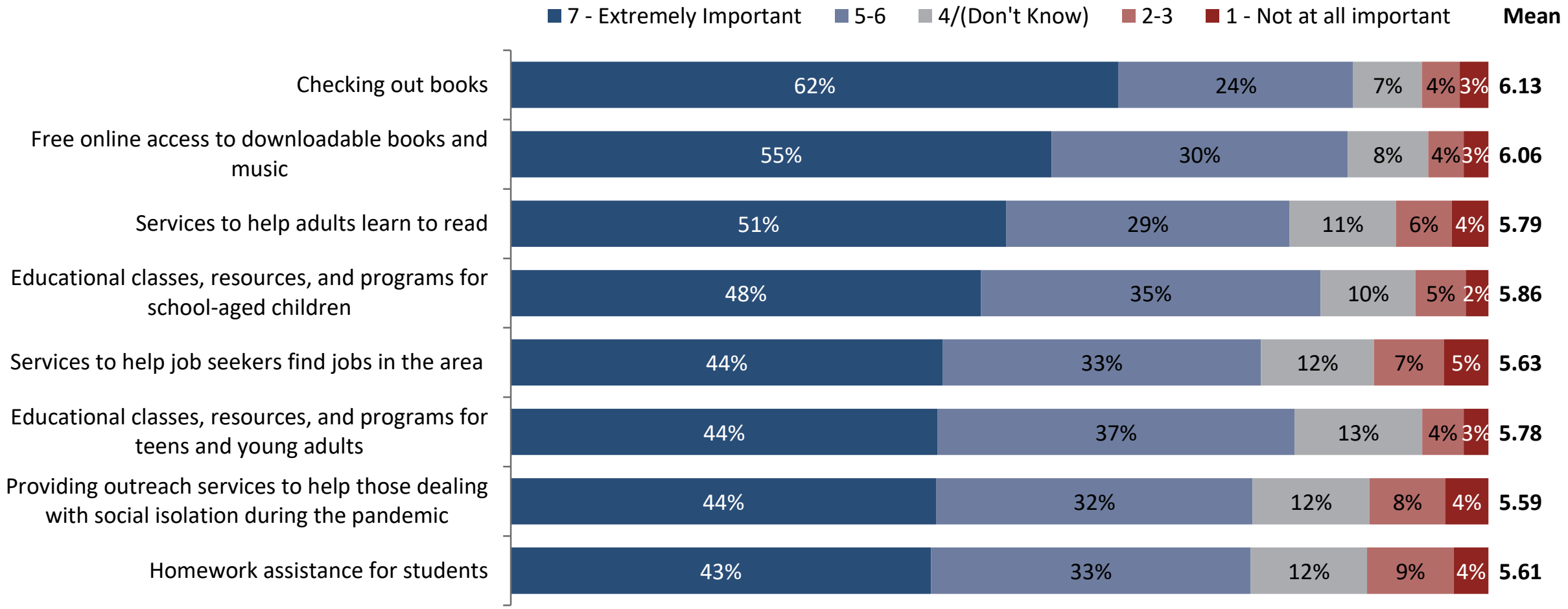
As you probably know, you live within the service area for the San Mateo County Libraries, which contains 12 libraries located throughout the county. Community libraries include Atherton, Belmont, Brisbane, East Palo Alto, Foster City, Half Moon Bay, Millbrae, Pacifica Sanchez, Pacifica Sharp Park, Portola Valley, San Carlos, and Woodside. The libraries provide a wide range of programs and services for children, teens, adults, and seniors, from book lending and computer access to educational classes.



Q8. Given what you've just heard, now do you have a Strongly Favorable, Somewhat Favorable, Somewhat Unfavorable, or Strongly Unfavorable opinion of San Mateo County Libraries?

Top Service Components

Traditional library services such as checking out books, access to digital resources, literacy services, and programming/resources for children and teens were ranked as the most important by residents.



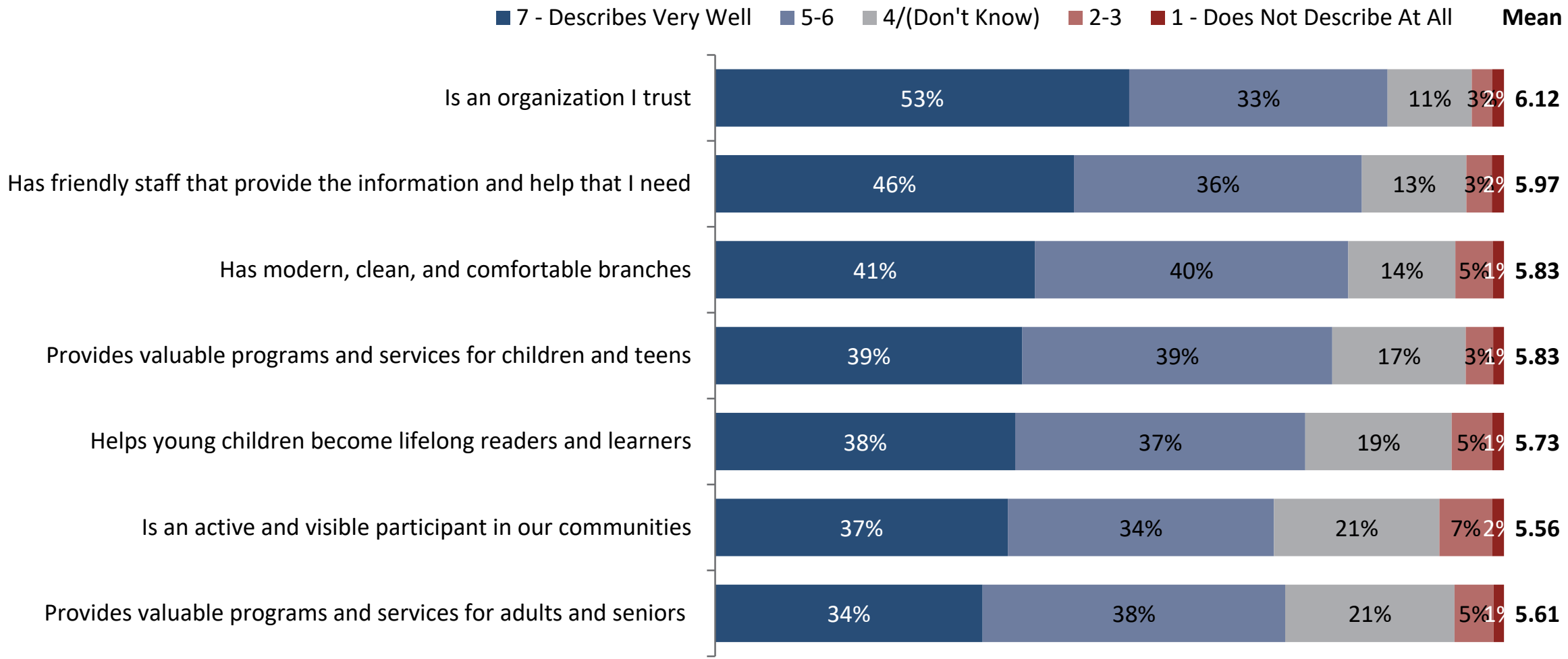
Q12-Q27. Regardless of how often you personally use the San Mateo County Libraries' services, we are interested in your opinions and impressions of the services they offer. Keep in mind that many of these services could include in-person or virtual options, or both. For each of the following, tell me how important you think this service is, using a scale of 1 to 7…

Service Importance Components

- Nearly all services were ranked as net important, with the singular exception of checking out bicycles.
- Generally, the following demographic subgroups were more likely to rate services as important across the board:
  - Women residents
    - Women with less education than a four-year college degree tended to rate services as more important than women with a four-year degree or more
  - Younger residents, under the age of 40
  - Hispanic residents
  - Residents who have a library card

Top Library Descriptors

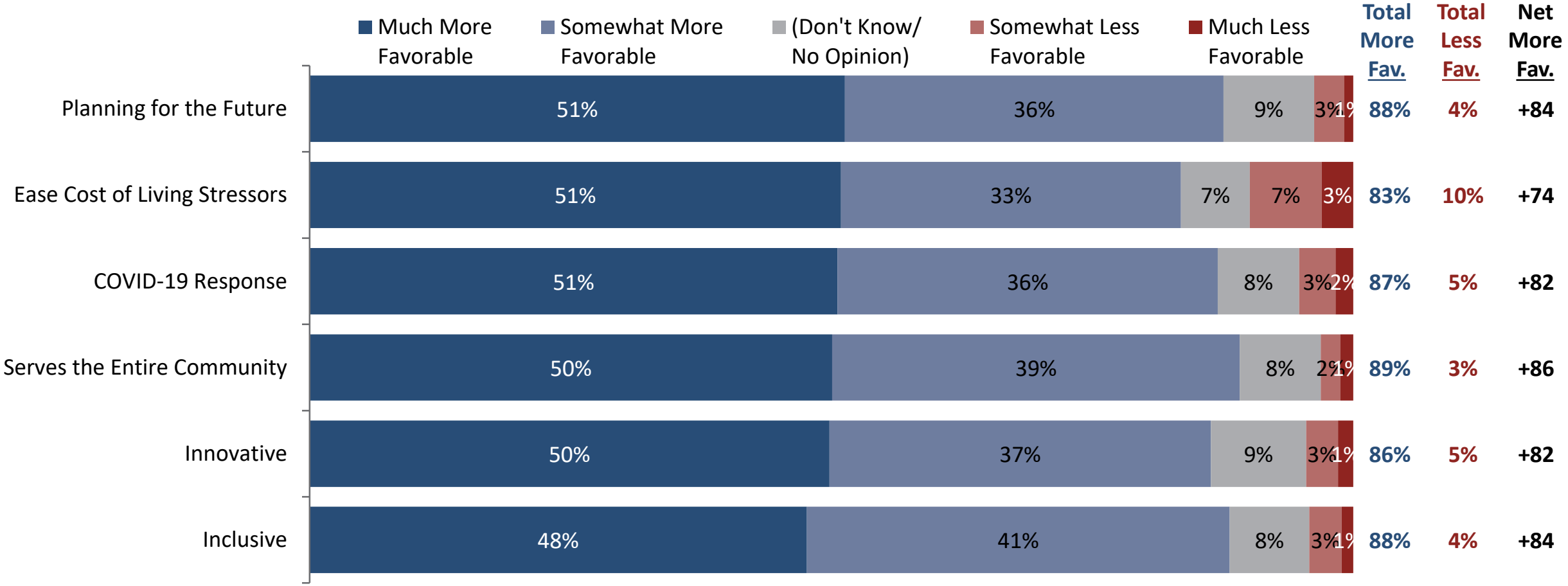
Over half of residents give the highest describes score to "is an organization I trust". Other high-ranking statements include friendly staff; modern, clean, and comfortable branches; and valuable programs and services for children and teens.



Q28-Q40. Now I'm going to read you a list of statements that some people have used to describe San Mateo County Libraries. Even if you've rarely or never visited the library, we are interested in your opinions. Using a 1 to 7 scale where 1 means the statement Does Not Describe At All and 7 means the statement Describes San Mateo County Libraries Very Well, please rate each one.

Messages

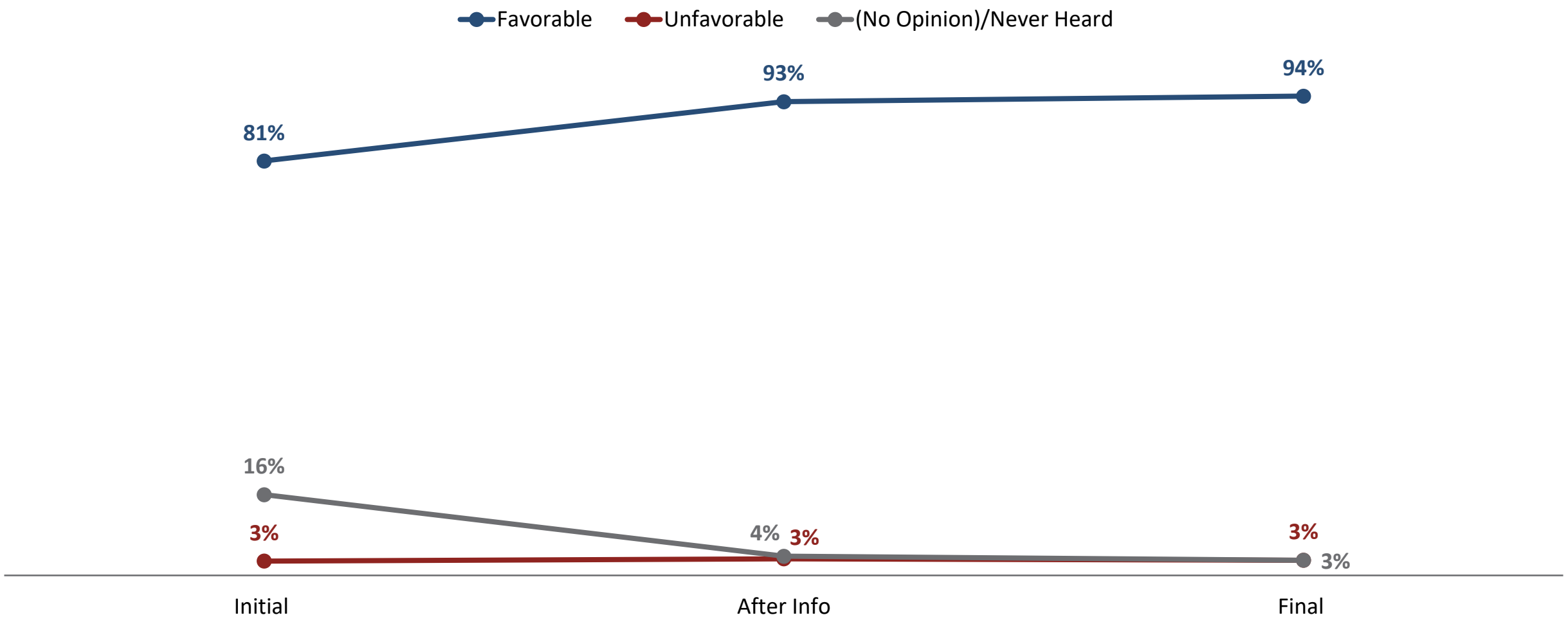
About half of residents feel that each message gives them a much more favorable opinion of San Mateo County Libraries. The Planning for the Future message elicits the most intensity, while the Serves the Entire Community message elicits the highest total more favorable opinion.



Q41.-Q46. Next, I'd like to read you some statements about San Mateo County Libraries. After you hear each statement, please tell me if it gives you a much more favorable, somewhat more favorable, somewhat less favorable, or much less favorable opinion of San Mateo County Libraries…

Favorable Rating: Libraries Progression

Favorable rating increases slightly after hearing messages.



Q48. Do you have a strongly favorable, somewhat favorable, somewhat unfavorable or strongly unfavorable opinion of San Mateo County Libraries?

Conclusions

- San Mateo County Libraries are very well-liked and trusted by the local community.
- The language used to describe San Mateo County Libraries was very effective, suggesting there are potentially multiple ways to tell a positive story about the libraries and the role San Mateo County Libraries plays in the local community. Given the very high trust and favorability ratings, San Mateo County Libraries is a voice that the vast majority of local residents will listen to.
- The research suggests that people continue to view book lending (physical or online) as the core library function. That's not to say San Mateo County Libraries should not continue to pursue other services and functions, but we should not lose sight of the importance of the core function of book lending.

EMC research

Patron Survey

Key Findings – Patron Survey

- San Mateo County Libraries continues to enjoy strong positive ratings from its patrons regarding its job performance and services.
- Patrons report using the system less due to the pandemic, although digital resources are proving to be important and well-rated.
- Patrons specifically highlight San Mateo County Libraries staff and convenience as some of the system's strengths.
- Traditional library services, like checking out materials (physical and digital) and computer/wi-fi access, are rated as the most important.

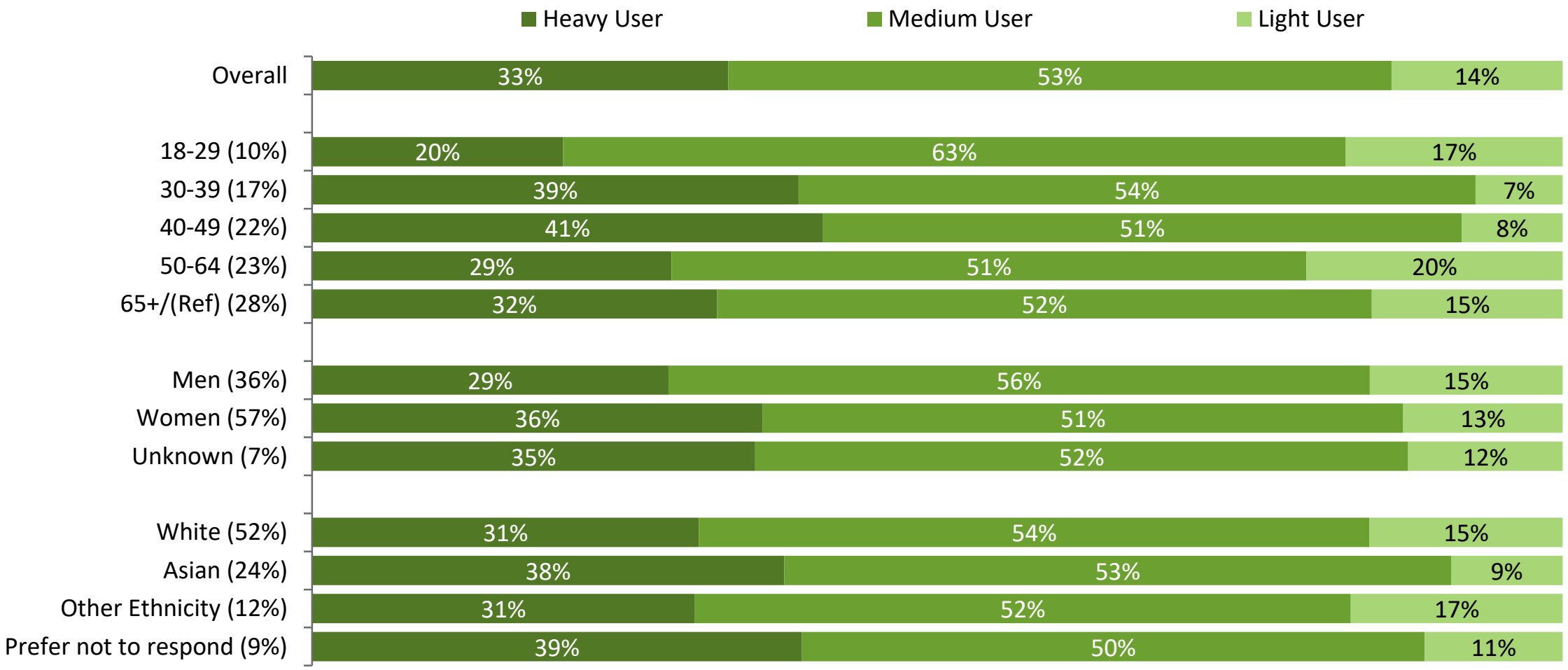
Library User Segmentation

A third of patrons fall into the heavy user category, and half into the medium user category.

Heavy User: *Visits a library or website once a week and the other at least once a month*
Medium User: *Visits a library or website at least monthly*
Light User: *Does not visit a library or website at least once a month*

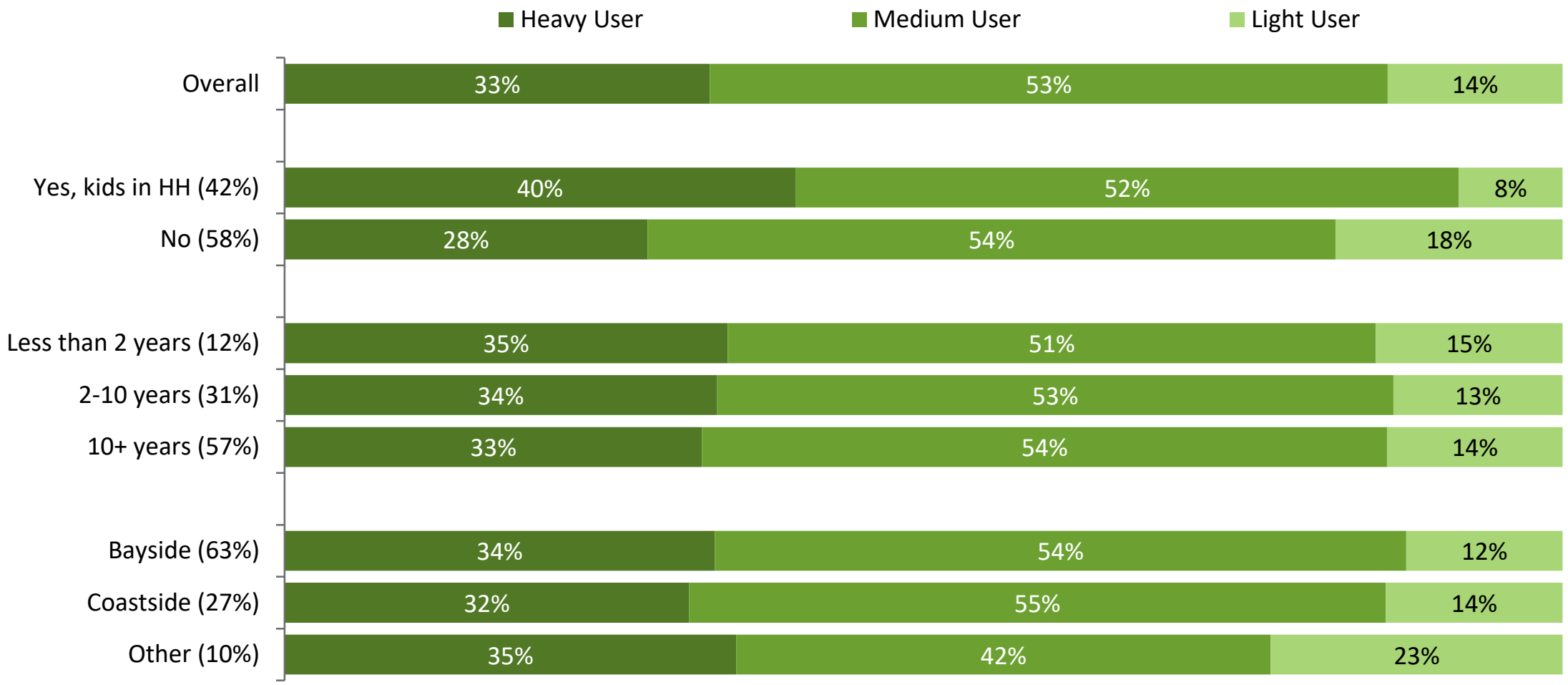
Library User Segmentation by Subgroup

Patrons aged 30-49 are more likely to be heavy users.



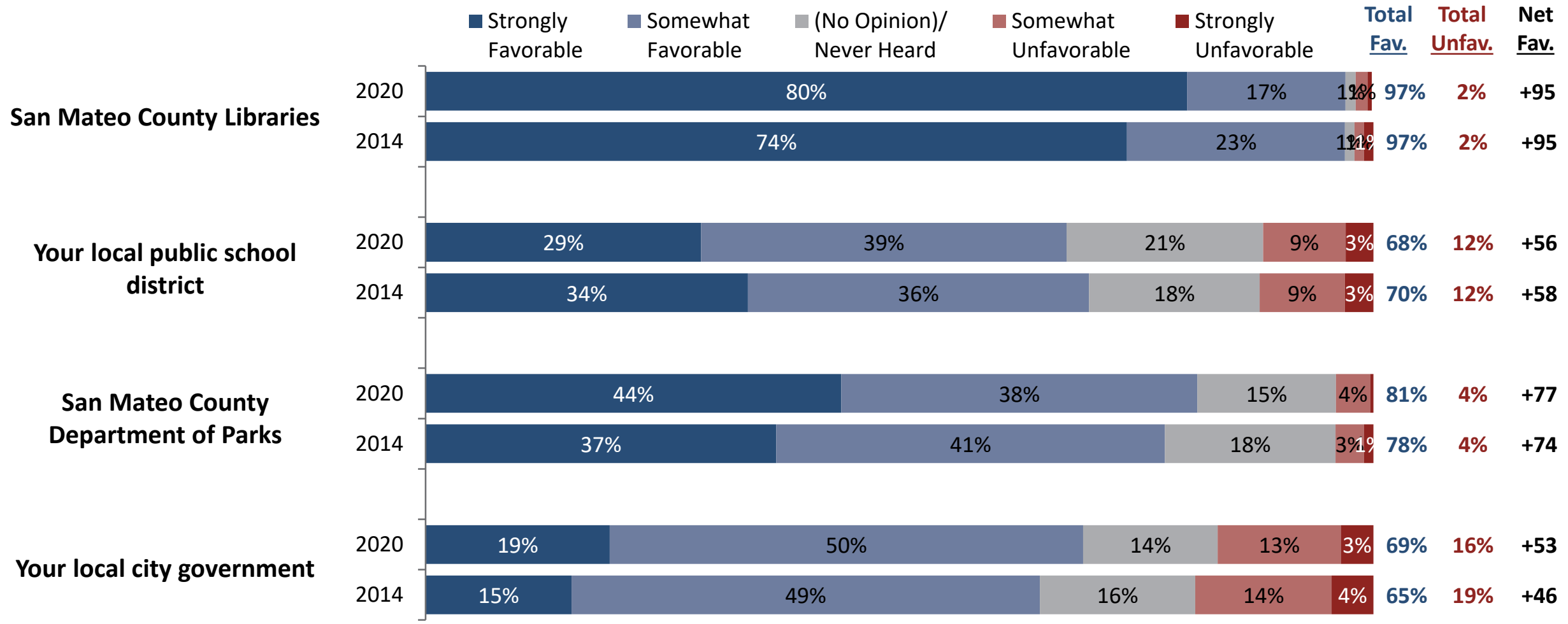
Library User Segmentation by Subgroup

Those with children in the household are more likely to be heavy users.



Favorable Ratings Over Time

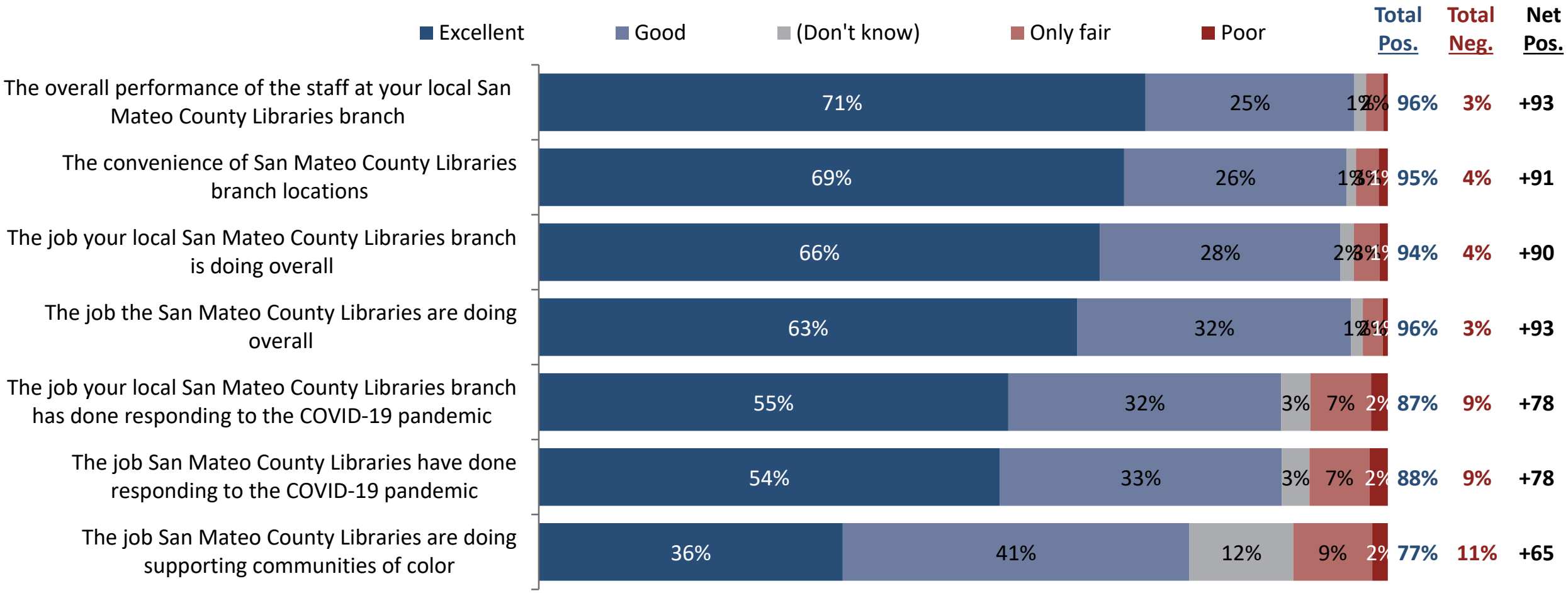
San Mateo County Libraries' rating has overall held steady at 97%, but the intensity of the favorable opinion has increased. The library performs the best of public organizations tested, and performs better among patrons than general residents.



Q2-Q5. I'm going to read you a list of several people and organizations. Please tell me if you have a strongly favorable, somewhat favorable, somewhat unfavorable or strongly unfavorable opinion of each one. If you have never heard of one, please just say so.

Job Performance Ratings

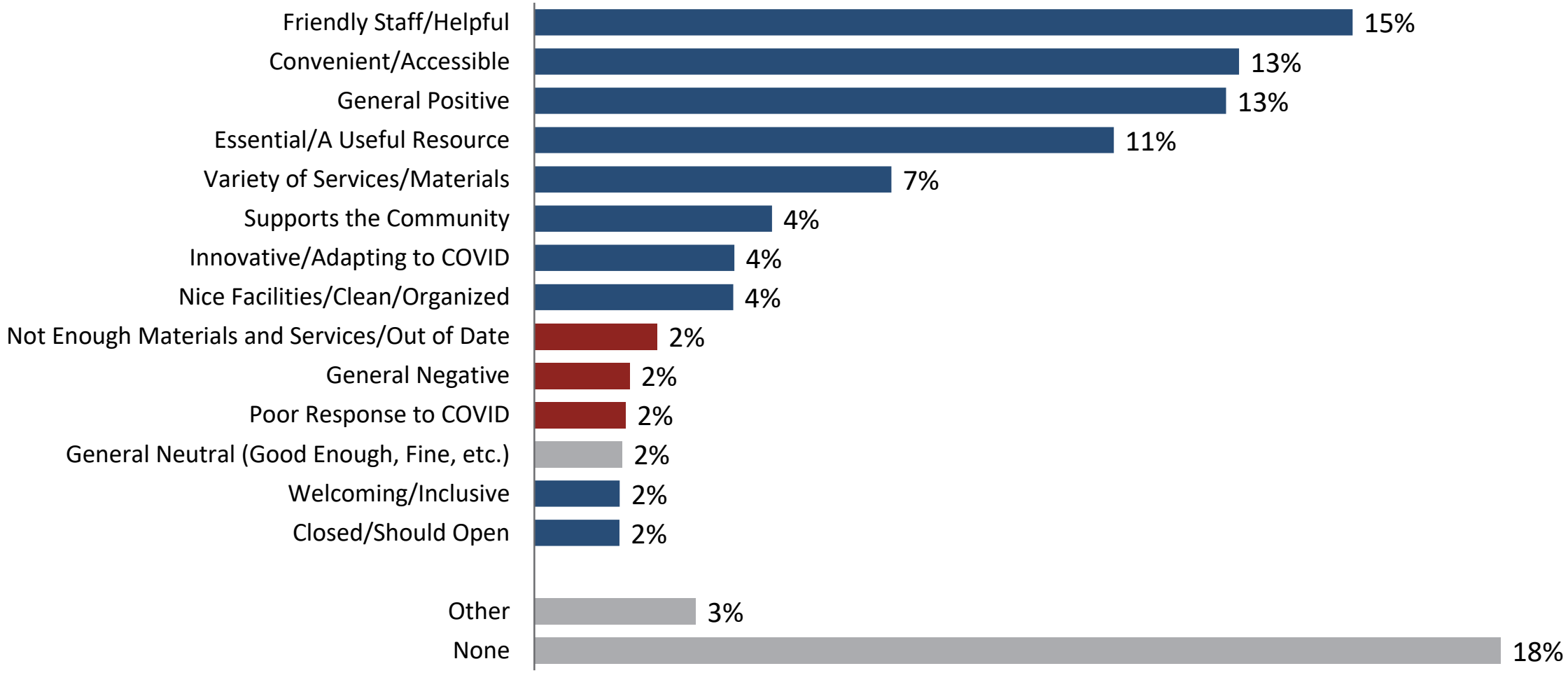
All aspects of San Mateo County Libraries' performance that were tested receive a positive rating from at least three-quarters of patrons. Staff, convenience, and the job of the local branches receive the highest net positive ratings.



Q6-Q12. Please rate each of the following…

San Mateo County Libraries Descriptions

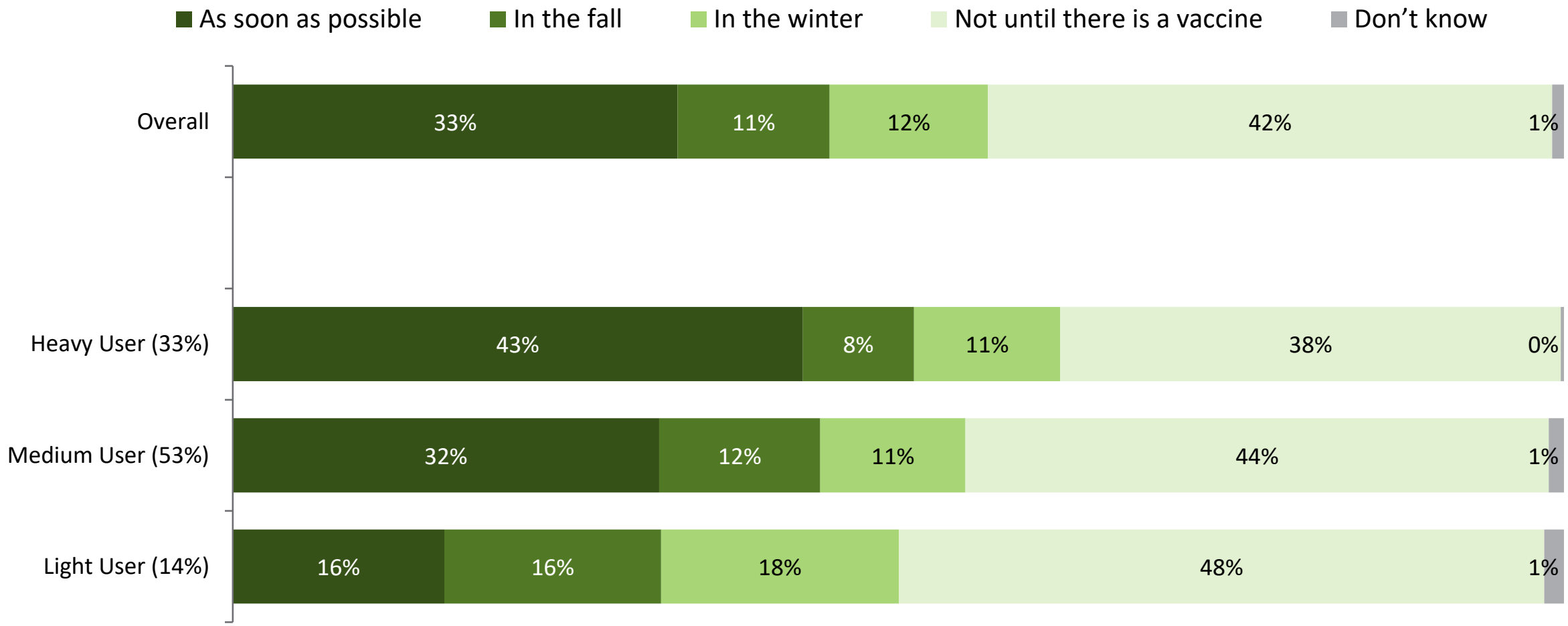
Patrons have largely positive impressions of San Mateo County Libraries, which they describe as having friendly and helpful staff, convenient, accessible, and an essential resource.



Q13. What two or three words or phrases would you use to describe San Mateo County Libraries?

Feels Safe to Visit Libraries

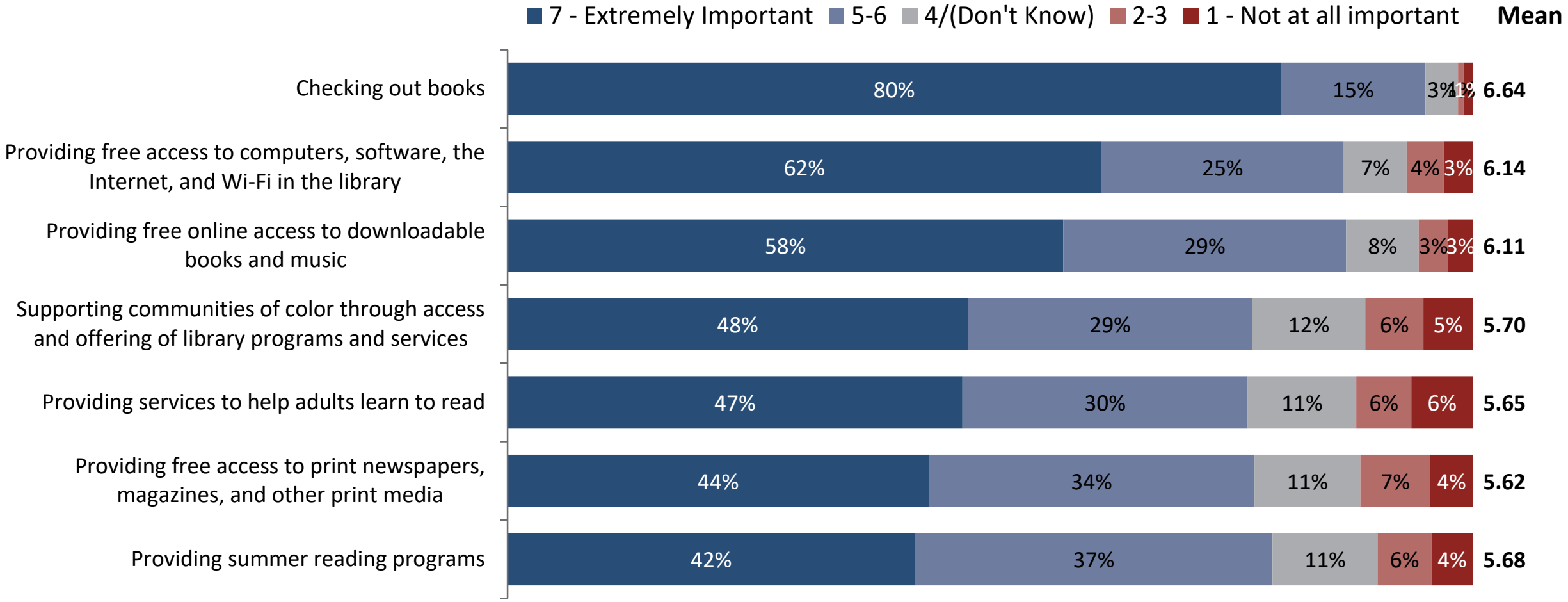
Two-fifths of patrons will wait until the virus is contained or there is a vaccine to resume modified visits to library locations. A third will visit as soon as the library resumes modified service. Heavy users are more likely to return to visiting sooner.



Q16. When the library begins offering indoor services and people are able to spend time inside the building in a modified way, as allowed by health orders, are you most likely to…

Top Service Importance Components

Some of the most important service components to patrons are traditional library services, like checking out books, providing computer/wi-fi access, access to newspapers and magazines, and reading and literacy programs.



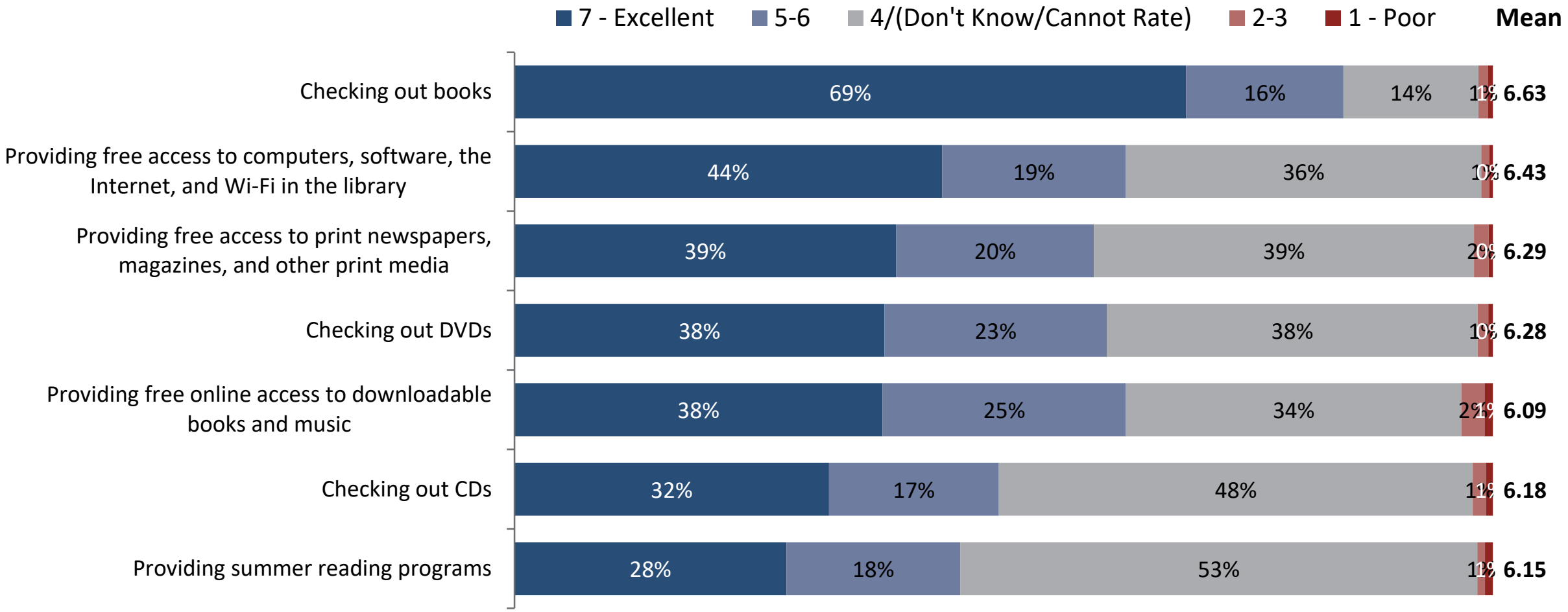
Q23-Q42. The following is a list of services that the San Mateo County Libraries offer when fully open. For each one, indicate how important you think this service is.

Service Importance Components

- Mean importance ratings stayed about the same or increased since 2014
- Generally, the following patron subgroups rated services across the board as more important than the overall patron population:
  - Women
  - Patrons who report having a card for ten years or more
  - Patrons who are white or another non-Asian ethnicity
- More heavy users rated checking out books, both physical and digital as more important than other segments, but rated other services like access to computers, help with homework, and literacy courses as less important.
- Light users were more likely to rate the importance of access to computers and Wi-Fi highly.

Top Service Performance Ratings

General library services, such as checking out books, DVDs, and CDs, access to Wi-Fi and computers, and print and digital material access received the highest mean ratings.



Q53-Q72. Please rate each of the following…

Service Performance Ratings

EMC research

- A majority of patrons were able to rate the top services shown on the previous slide. However, fewer patrons were able to rate more specialized services, such as programs and services for teens, children, and seniors; mobile services; and literacy and computer classes.
- All services tested received a net positive rating, meaning that of those who could rate the service, more rated it positively than negatively.
  - Ratings across the board stayed the same or increased from 2014.
- Generally, the following patron subgroups rated mean performance higher than the overall patron population:
  - Women, particularly those over the age of 50
  - Patrons who reported a Coastside ZIP Code
  - Patrons who reported having a card for three years or longer
- Heavy users were more likely to rate the performance of the following higher: summer reading programs, providing programs for toddlers and babies, and providing programs and classes for seniors.

Conclusions

- Overall, San Mateo County Libraries is receiving job and performance ratings on par with or above those seen in 2014.
  - There is room to increase ratings on diversity of programming and supporting communities of color, but San Mateo County Libraries is regarded as an inviting, inclusive space by patrons.
- Patrons are concerned about COVID, and many say they will not return to using library facilities until there is a vaccine or the virus is contained.
  - Patrons rate curbside pick-up and digital services highly, and would like to see current non-online services offered on Saturdays and weekday afternoons.

EMC research

Appendix

Methodology – Resident Survey

EMC research

- Hybrid email-to-web and live telephone survey of adult residents in the San Mateo County Libraries service area
- Survey conducted May 28 – June 2, 2020
- 632 interviews; overall margin of error ±3.9 percentage points
- Interviews were conducted in English, Spanish, and Chinese by trained, professional interviewers; landlines and mobile phones included
- Where applicable, results compared with the following:

Methodology	Dates	Universe	Sample Size	Margin of Error	EMC #
Phone	March 2-12, 2014	Adult residents	800	±3.46 percentage points	14-5152

Please note that due to rounding, some percentages may not add up to exactly 100%.

Methodology – Patron Survey

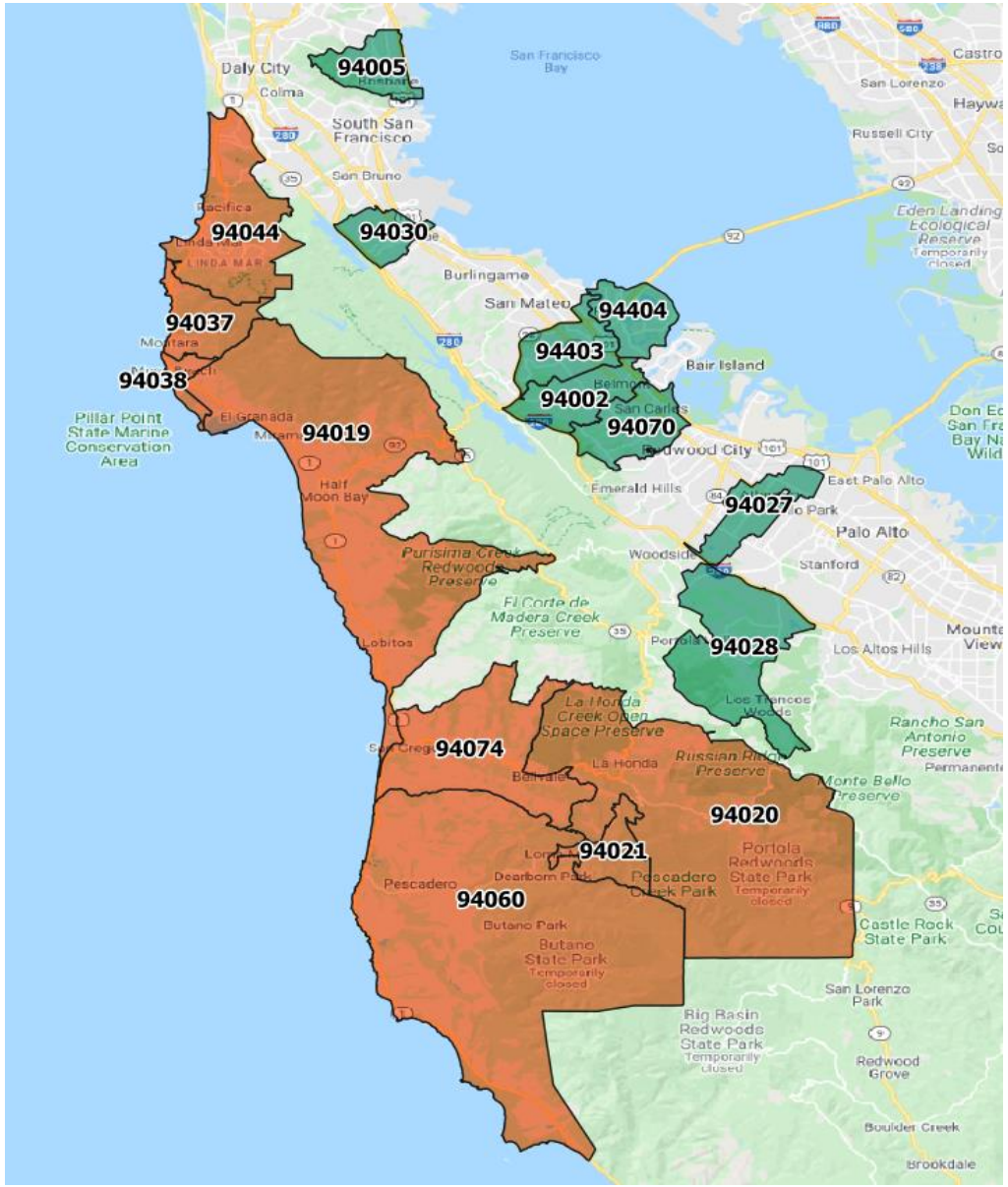
EMC research

- Online email-to-web survey of San Mateo County Libraries Patrons
- Survey conducted July 22 – August 3, 2020
- 1021 interviews; overall margin of error ± 3.07 percentage points
- Surveys were offered in English, Spanish, and Chinese
- Survey conducted during weeks 19 and 20 of the coronavirus pandemic, when many businesses were shuttered due to public health orders.
- Where applicable, results compared with the following:

Methodology	Dates	Universe	Sample Size	Margin of Error	EMC #
Online	May 15-23, 2014	SMCL Cardholders	1,200	±2.83 percentage points	14-5153

Please note that due to rounding, some percentages may not add up to exactly 100%.

Regions for Analysis



San Mateo County Libraries Service Area

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- Coastside

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