Charlotte Mecklenburg Library

Community and User Surveys
Final Report
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Methodology

1. MarketWise conducted a Community Survey with 402 randomly selected adults (age 18 or older) residing in Mecklenburg County. The sample contained random digit dial (RDD) landline numbers and RDD cell phone numbers. By using random digit dialing, the final sample included residents with both listed and unlisted landline numbers. The cell phone numbers ensured the final sample also included residents who use cell phones exclusively. Landline samples alone tend to skew white and older. Adding the cell phone numbers made the final sample more representative because it has adds more young adults and minorities.

2. MarketWise also conducted a Library User Survey. Library users (n=234) were pulled from the Community Survey and added to a targeted sample of library users (n=200), for a final sample of n=434.

3. Data collection for both studies took place November 26, 2012 through January 7, 2013. Interviewing was suspended over the Holidays (December 23, 2012 through January 2, 2013).

4. The Community Survey (n=402) has a margin of error of $\pm$ 4.9 percentage points at the 95% confidence level.   The Library User Survey (n=434) has a margin of error of $\pm$ 4.7 percentage points at the 95% confidence level.

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Methodology

5. For both studies, the questionnaire was translated and administered in Spanish when necessary. Eight percent of the interviews for the Community Survey and six percent of the interviews for the Library User Survey were conducted in Spanish.

6. The introduction for the Community Survey did not mention that the survey was specifically about the Charlotte Mecklenburg Public Library. This was necessary to make sure those who agreed to take the survey were not biased toward the Library. Interviews for Library users took 18 minutes on average, while interviews for non-users took 16 minutes.

7. Data collection was performed by MarketWise interviewers, who are trained to Marketing Research Association (MRA) standards for professional telephone interviewing. All data collection was conducted from the MarketWise Call Center and was supervised by professional staff. The project was conducted using a computer assisted telephone interviewing (CATI) system.

8. MarketWise interviewers made 4 attempts to reach each sampled respondent before it was considered a dead end. One attempt was made to convert refusals.

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Comparison of Sample with Census Data

	Projected Census Statistics for Mecklenburg County for adults, age 18 or older	Mecklenburg County Community Sample (n=402)
Gender (Q1)		
Male	49%	49%
Female	51%	51%
Race/Ethnicity (Q3)		
White (non-Hispanic)	50%	49%
Black	32%	32%
Hispanic	12%	13%
Other	6%	6%
Age (Q4)		
18-34	34%	34%
35-44	22%	20%
45-54	18%	19%
55-64	13%	14%
65+	13%	13%

The Community Survey is representative of Mecklenburg County in terms of gender, race/ethnicity, and age.

Summary and Conclusions

Objective: Quantify level of importance of the Charlotte Mecklenburg Library

- Most of the community sample (90%), users (97%), and non-users (86%) believe the Charlotte Mecklenburg Library is extremely or very important "to our community."

- A strong majority of the community sample (73%) and users (81%) also indicate the Library is extremely or very important "to you and your family." Just over half of non-users (53%) give ratings that high.

- A strong majority of the community sample, users, and non-users agree strongly <u>or</u> somewhat that the Library is a valuable educational resource, provides services for literacy and lifelong learning, improves the quality of life in our community by providing free resources, enhances the image of our community, has enhanced their education, is a valuable resource for finding a job, and are aware of programs and services. The strength of agreement is not as strong for: has enhanced my education, is a valuable resource for finding a job, and awareness of programs. Being a valuable resource for finding a job received substantially more don't know responses than any of the other areas.

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Summary and Conclusions

- When asked to comment (unaided) on the most important programs and services that the Library provides to "benefit the community," by far the most frequent mention for the community sample, users, and non-users was the ability to check out books. Other top tier mentions for all groups are computers/printers/fax , Internet access/Wi-Fi, and research/reference materials. Among the community sample and users, children's programs are top tier, but are second tier among non-users. Employment and resume help is second tier for all groups of respondents.

- When asked the same question (most important services) but in regard to "you and your family," the top mentions were the same. Again, there was a major gap between users and non-users unaided mentions of children's programs.

- Respondents were read a list of 17 library services and asked to rate their importance by using a 1 to 10 rating scale, with 10 as most important. Most of the community sample, users, and non-users rated all the services very or somewhat important (rating of 7 to 10). In fact, the majority of each group rated all but three services extremely important (rating of 9 or 10). The three services that are important, but not extremely important are: providing eBooks/music/e-audio books, audio books/music on CD, and movies on DVD. Most respondents, regardless of the group, were able to rate the importance of the 17 services.

Summary and Conclusions

- *It is clear that all the Library services rated in the survey are important (all are rated 7 or higher by a majority of respondents). However, many of the services rated extremely high on importance were not mentioned as important on an unaided basis. Top of mind awareness is critically important because members of the community (users and non-users) may not think of the Charlotte Mecklenburg Library as an option when services are needed. Further, they may not refer others to use it.*

- A very high percentage (82% or higher) of the community sample, users, and non-users believe it is extremely important (rating of 9 or 10) to establish or maintain Library branches in economically challenged areas of our community.

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Summary and Conclusions

Objective: Quantify awareness of the need for private donations and likelihood of donating

- Only half of the community sample (53%) are aware that the Library needs and requests private money to enhance programs and services. Users are more likely than non-users to be aware of the need (58% vs. 44%).

- The likelihood of donating in the next 12 months is relatively low. Users are more likely than non-users to say they would be very or somewhat likely to donate (44% vs. 35%). However, only about 10% of both users and non-users are extremely likely to donate.

- *The likelihood of being extremely likely to donate is down from 2010 (as measured in the 2010 Library Task Force Community Survey). Comparing 2010 to 2012 findings, the percentage of respondents extremely likely to donate are: 18% vs. 11% for the community, 21% vs. 12% for users, 8% vs. 10% for non-users. These findings show that the Library cannot depend on the same level of donations now as it did in its time of crisis.*

Objective: Quantify users of the Charlotte Mecklenburg Library

- The majority of respondents in the community sample (59%) have used Library services over the past 12 months. Respondents who have only used the Library to vote (7% of the community sample) are included with non-users.

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Summary and Conclusions

Objective: Examine reasons for not using the Charlotte Mecklenburg Library (Among non-users)

- Non-users were read a list of reasons for not using the Library and were asked to indicate which reasons applied to them. The top reasons were:
  - Get information from Internet (65%)
  - Too busy, no time (57%)
  - No need or interest (51%)
  - Purchase rather than borrow (46%)
  - Not aware of programs and service (33%)

- Second tier reasons are:
  - Hours/days not convenient (18%)
  - Limited by age, health, mobility (15%)
  - Locations not convenient (13%)
  - No transportation (11%)
  - Don't know where a Library is located (10%)

- *It is clear that quality of services is not a primary reason for not using the Library. Most of the top reasons are things the Library cannot change. However, awareness of programs is among the top reasons. Increasing awareness of specific services should be a top priority for the Library.*

- When asked specifically if they would use the Library if the hours and days were more convenient, 37% of non-users said "yes."

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Summary and Conclusions

Objective: Examine Library Use (Among users)

- Almost all users have visited a Library location in person in the past 12 months (less than ½ percent had not visited in person).

- Services used by a majority of users (56% or more) are:
    - Used staff to help find books or resources
    - Checked out printed book
    - Used as place to read, work, study
    - Used reference materials, newspapers, or magazines
    - Used a computer or Internet
    - Used the Website

- Services used by more than a third of users (38% to 49%) are:
    - Used meeting rooms, including to vote
    - Used staff to help with use of computer or Internet
    - Used free Wi-Fi

- Services used by more than 20% of users (23% to 29%) are:
    - Used services for homework
    - Checked out audio books or music on CDs
    - Checked out movies on DVDs
    - Used for job search or resume help
    - Used for services for children, age 5 or under

- Services used by about 10% of users are:
    - Downloaded eBooks, music, or e-audio books
    - Used staff led computer or Internet training

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Summary and Conclusions

Objective: Examine Library Use (Among users)

- Among users, 42% indicate they would use the Library more if hours or days of operation increased.

- If funding increased and hours of operation could be increased, the preference of users would be to:
  - Keep the same hours, but be open an additional day (45%)
  - Keep same days, but be open additional hours in the evening (38%)
  - Don't know which they prefer (11%)
  - Keep the same days, but be open additional hours in the morning (6%)

- Almost half of users (47%) have a child or children, under age 18, who have used the Charlotte Mecklenburg Library in the past 12 months.

- Almost two-thirds of users (61%) indicate there is another adult or adults (age 18 or older) in their household who have used the Charlotte Mecklenburg Library in the past 12 months.

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Summary and Conclusions

- Most Charlotte Mecklenburg Library users can be classified as heavy users (30% use it five or more times a month) or moderate users (35% use it two to four times a month). Only a quarter of users would be classified as light users (using it only once or less than once in a typical month).

- Most users use the Library location that is closest to home (81%) and it takes them 11 minutes on average to reach the location.

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Summary and Conclusions

Objective: Quantify performance of Charlotte Mecklenburg Library

- Ratings of the Library overall are high among the community sample, users, and non-users. The majority of the community sample and users gave top ratings of 9 or 10 (53% and 58%), and almost half (47%) of non-users also gave the Library top ratings. Less than 10% of any of these groups gave a rating of 6 or below. 18% of non-users (8% of the community sample) could not rate the Library overall.

- Research by Frederick Reichheld indicates that willingness to promote an organization by recommending it to friends, colleagues, and customers is a very strong indicator of loyalty. Reichheld developed an index called the net promoter score to measure promoters. The net promoter score is the percentage of customers who say they are extremely likely to recommend minus the percentage who say they are unlikely to recommend. Reichheld believes an extremely high or world class net promoter score is one of 75 or higher.

    - Library net promoter scores are: 69 for the community sample, 77 for users, and 58% for non-users.

    - *Users are very strong promoters of the Charlotte Mecklenburg Library overall.*

Summary and Conclusions

- Users were asked to rate the performance of the Library on 17 service attributes. While 95% or more of users could rate the importance of the same service attributes, from 5% to 60% of users were unaware of or did not have a perception of how well the Library performs on some of the services.

  – If ratings are based on total users (i.e., respondents who answered "don't know" are included in the base) then only 8 of the 17 service attributes have more than half of the users rating them extremely good (9 or 10.)

  – If the analysis is based on users who have a perception of the services (i.e., "don't know" responses are dropped from the base for the analysis), then 13 of the 17 attributes are rated extremely good by a majority of users. The four services with <u>less</u> than a majority of users rating them extremely good are:

    – hours/days of operation
    – eBooks/music/e-Audio books to download
    – audio books/music on CD
    – movies on DVD.

  – *Awareness of specific services is a key issue for the Library. If users don't have a perception or are unaware of specific services, they are unlikely to use them. Users also cannot help educate or promote specific services to others (other users or non-users) if they are not aware of the service or don't have an opinion of them.*

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Summary and Conclusions

A Quadrant Analysis was conducted to show priority services (those with above average importance) and where a performance improvement should have the most impact on customer satisfaction and perceptions of performance.

Quadrant 4: Low importance/High performance
e. Reference materials, newspapers, magazines
l. Staff led computer/Internet classes

These are relatively less important than attributes in Quadrants 1 & 2. You can move some attention from these as long as you maintain adequate performance.

Note: Remember that low importance means relatively low. The majority of users perceive almost all the services to be extremely or somewhat important.

Quadrant 1: High importance/High performance
f. Staff to help find books, resources
g. Programs for children under 5
i. Computers/Internet access
j. Free Wi-Fi
k. Staff to help with computers/Internet
m. Website
n. Help to find job/create resume
o. Place to read, work, study
p. Meeting rooms
h. Homework help
Keep doing these things well.

Quadrant 3: Low importance/Low performance
b. Variety of audio books/music on CD
c. Variety of movies on DVD
d. Variety of eBooks, music, e-audio books to download
These are relatively less important than attributes in Quadrants 1 & 2. Do not make improvements at the expense of other more important services, but improve if possible.

Quadrant 2: High importance/Low performance
a. Variety of books
q. Hours/days of operation
Work to improve these services.

Summary and Conclusions

Objective 7: Examine perceptions of the need for the Charlotte Mecklenburg Library in the future and what needs to be done to meet emerging needs

- Almost half (47%) of respondents in the community sample believe the need for the Library will increase in the next 10 years, while only 24% believe the need will decrease. Users are more likely than non-users to say the need will increase (52% vs. 38%).

- The primary reasons given (unaided) by those who believe the need will increase are:
    - population growth
    - need for Internet, computers, and technology will increase
    - free resources for the economically challenged will be needed
    - need for education and information will grow
    - economic cycles can increase need
    - needs of children will increase

- The primary reasons given (unaided) by those who believe the need will decrease are:
    - increase of Internet and computers at home
    - mobile technology
    - printed materials becoming outdated
    - economic cycles can decrease need
    - people don't read as much
    - lack of funding

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Summary and Conclusions

- When asked (unaided) what can be done to make the Library meet the emerging needs of the future, the most frequent responses were:
  - don't know
  - keep up with technology and changing times
  - increase hours and days of operations
  - increase awareness
  - get adequate funding
  - Increase and update materials
  - get more computers
  - keep doing what you are doing
  - better staffing
  - more children's programs

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Summary and Conclusions

- *Perceptions of Charlotte Mecklenburg Library overall are very positive in the community and particularly among users. The very high net promoter score of users indicates they are loyal and strong promoters of the Library. All the services measured are considered either important or extremely important by a majority of the community sample, users, and non-users. Quality of services is not an issue. Users who are familiar enough to rate services, give high performance ratings to most services.*

- *This research indicates the primary issue the for Charlotte Mecklenburg Library is awareness of its specific programs and services. Users are very strong promoters of the Library overall, but they cannot promote specific services if they are not aware of them or if they do not have a perception of the quality of the service.*

- *Recommendations:*

  - *Increase awareness of specific services.*

  - *Let your users help promote Library services. They are very strong promoters overall, but many are unfamiliar with the Library's full range of services, even services they believe are extremely important.*

    - *Use messaging in the Library to educate and promote services. Almost all users visit a Library location in person. This provides the Library with the opportunity to reach almost all users over a period of time. The messaging should educate users about services, their importance, and about Library success.*

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Summary and Conclusions

- *The survey research supports the establishment of a "Digital Branch." Survey respondents expressed the belief that the top way for the Library to meet the emerging needs of the future is to keep up with technology and changing times. Many people are already set up to use digital technology (i.e., they have a computer, smartphone, tablet or eBook reader and they use the Internet).*

- *The Library needs to increase awareness that it offers access to digital media as part of its services. There is low awareness of this service area. The name "Digital Branch" should help increase awareness.*

- *While increasing hours and days of service may not have a big impact on converting non-users to users, it is perceived by users to be the service area most in need of improvement. If funding allows the option to increase hours and days of service, keeping the same hours and adding another day of service is the preferred option.*

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DETAILED FINDINGS

Objective

**Quantify Level of Importance
of the Charlotte Mecklenburg Library**

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How important is the
Charlotte Mecklenburg Public Library . . . (Q6-7)
Community Sample (n=402)
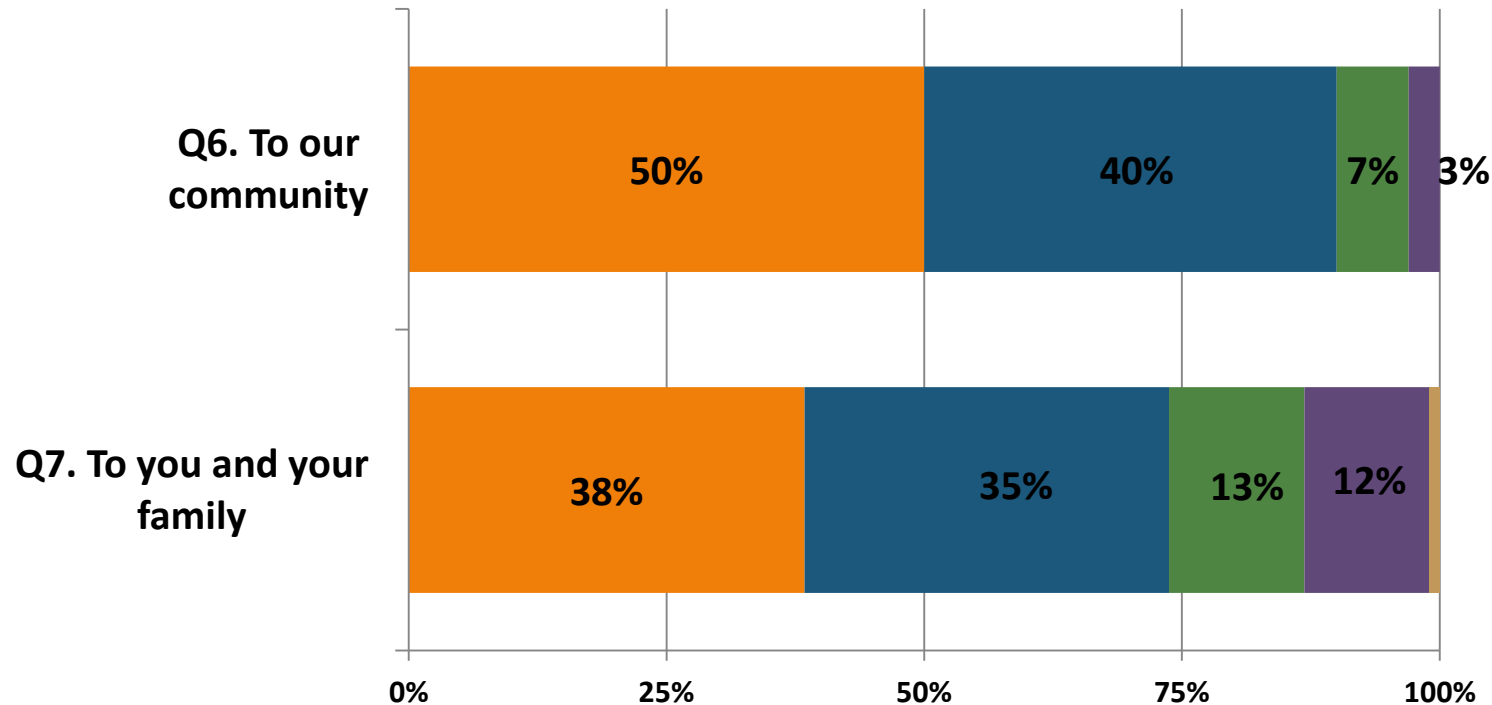
There is no significant difference between these results and those of the 2010 survey conducted for the Future of the Library Task Force.

Legend:
- Extremely imporant
- Very important
- Somewhat important
- Not or only a little important
- Don't know

Charlotte Mecklenburg Library

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How important is the Charlotte Mecklenburg Library to our community? (Q6)
Users vs. Non-Users
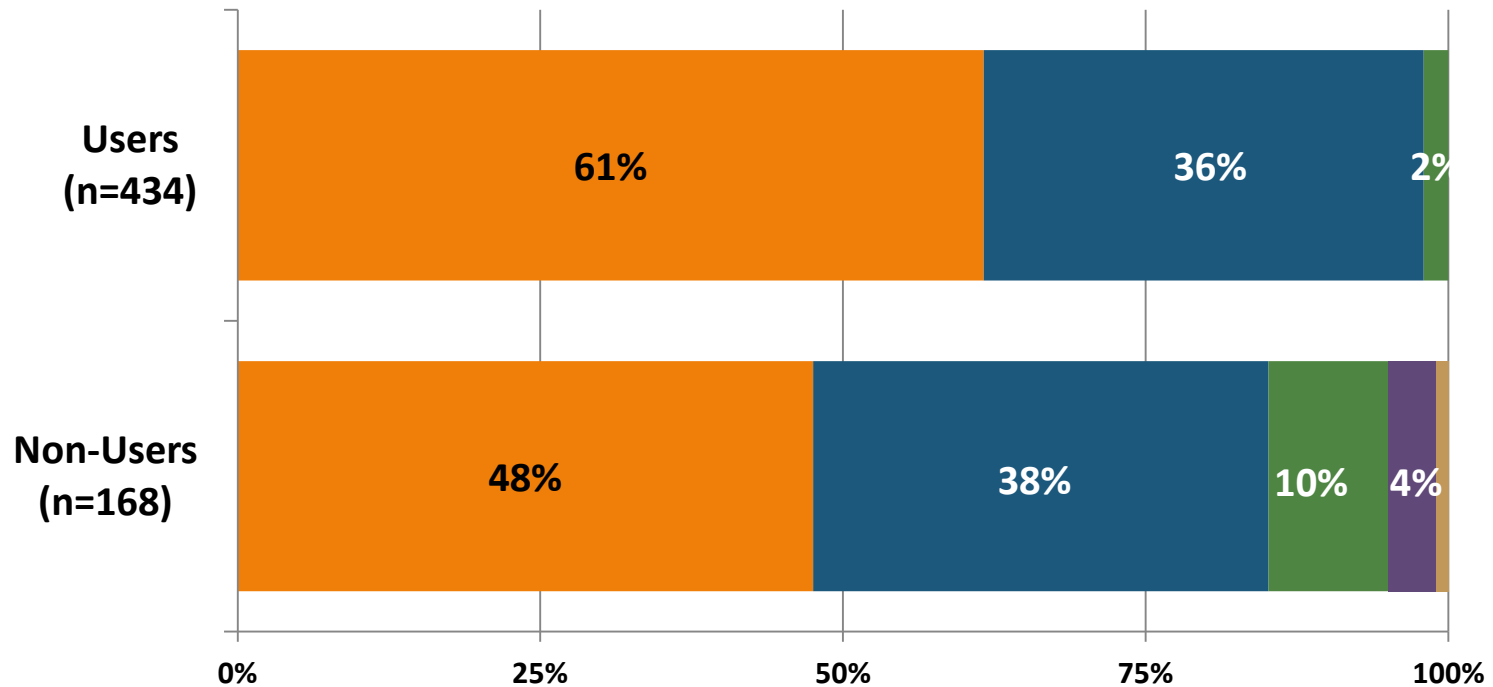
Users (n=434): Extremely important 61%, Very important 36%, Somewhat important 2%

Non-Users (n=168): Extremely important 48%, Very important 38%, Somewhat important 10%, Not or only a little important 4%

Legend:
- Extremely imporant
- Very important
- Somewhat important
- Not or only a little important
- Don't know

There is no significant difference between these results and those of the 2010 survey conducted for the Future of the Library Task Force.

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How important is the Charlotte Mecklenburg Library to you and your family? (Q7)
Users vs. Non-Users
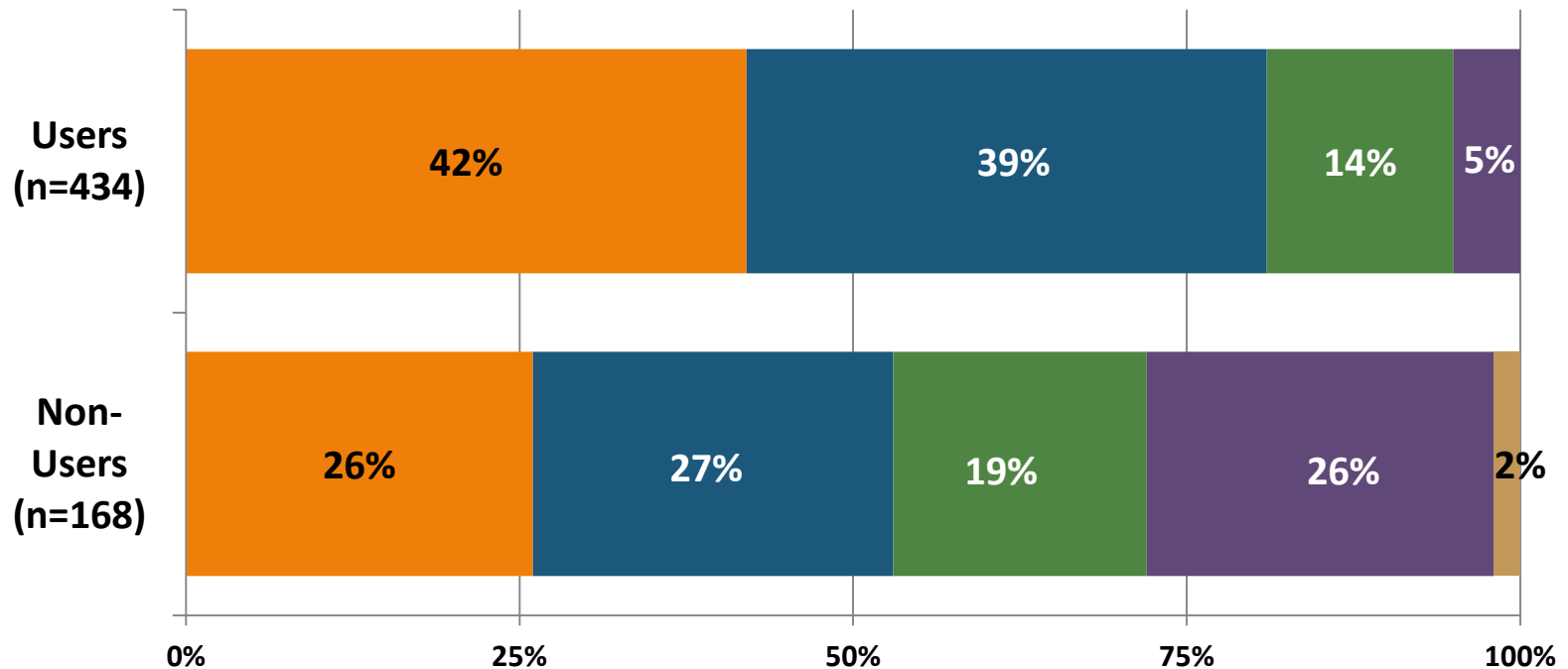
Users (n=434)
- Extremely important: 42%
- Very important: 39%
- Somewhat important: 14%
- Not or only a little important: 5%

Non-Users (n=168)
- Extremely important: 26%
- Very important: 27%
- Somewhat important: 19%
- Not or only a little important: 26%
- Don't know: 2%

Legend:
- Extremely imporant
- Very important
- Somewhat important
- Not or only a little important
- Don't know

There is no significant difference between these results and those of the 2010 survey conducted for the Future of the Library Task Force.

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Level of Agreement/Disagreement with Statements About the Charlotte Mecklenburg Library (Q8a-g)
Community Sample (n=402)

Statement	Agree strongly	Agree somewhat	Disagree somewhat or strongly	Don't know
c. Is a valuable educational resource	89%	10%		
b. Provides services for literacy, lifelong learning	80%	16%	2%	
a. Improves quality of life by providing free materials, resources	76%	20%	4%	
f. Enhances image of community	74%	23%	2%	
d. Has enhanced my education	56%	27%	13%	3%
e. Is a valuable resource for finding a job	45%	30%	8%	17%
g. I am aware of the programs and services	40%	39%	17%	4%

Legend: ■ Agree strongly ■ Agree somewhat ■ Disagree somewhat or strongly ■ Don't know

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Percent Rating Strongly Agree to Statements About the Charlotte Mecklenburg Library (Q8a-g)
Users vs. Non-Users
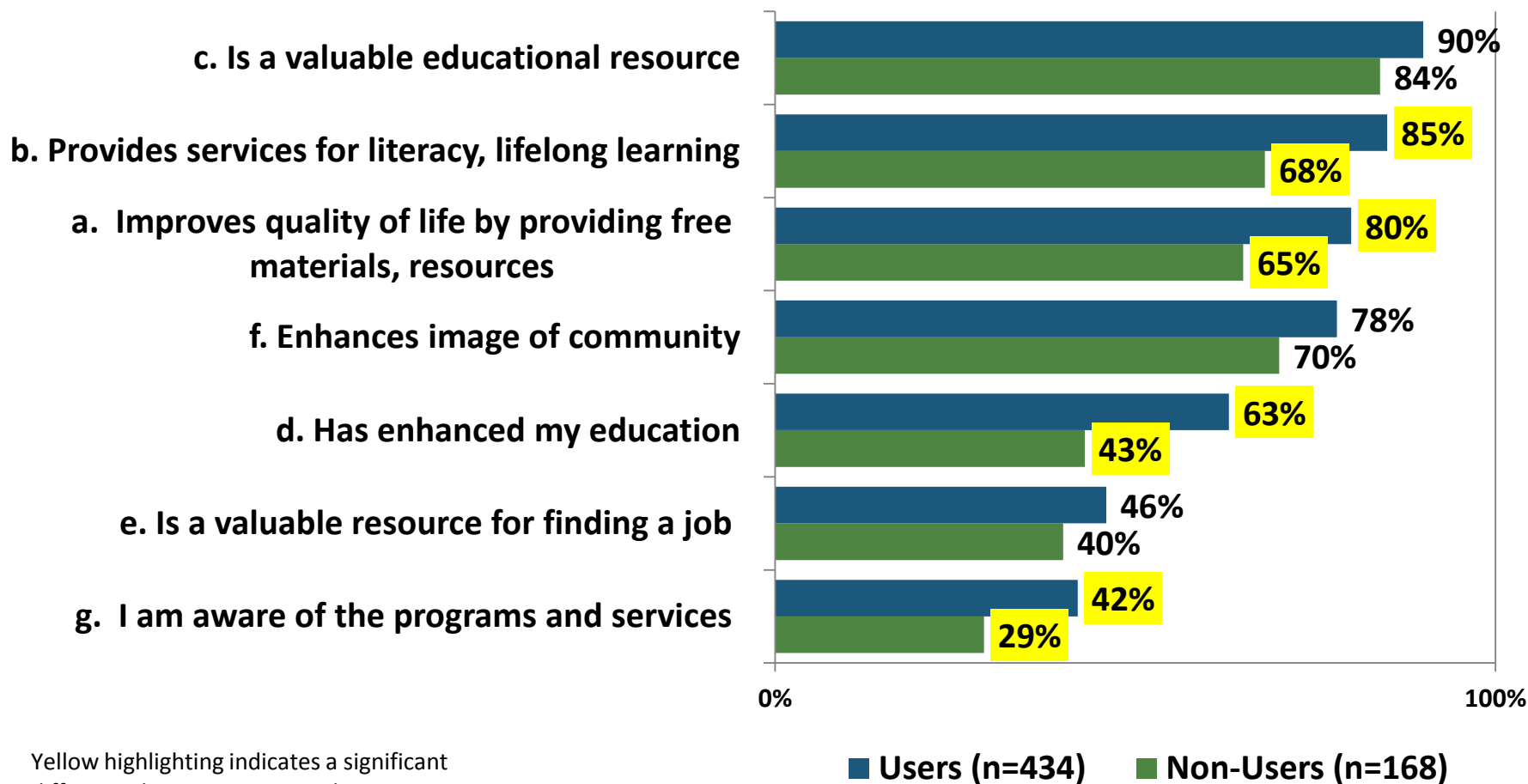
c. Is a valuable educational resource
- 90%
- 84%

b. Provides services for literacy, lifelong learning
- 85%
- 68%

a. Improves quality of life by providing free materials, resources
- 80%
- 65%

f. Enhances image of community
- 78%
- 70%

d. Has enhanced my education
- 63%
- 43%

e. Is a valuable resource for finding a job
- 46%
- 40%

g. I am aware of the programs and services
- 42%
- 29%

0%   100%

Yellow highlighting indicates a significant difference between Users and Non-Users.

■ **Users (n=434)**   ■ **Non-Users (n=168)**

Charlotte Mecklenburg Library

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What are the most important programs and services the Charlotte Mecklenburg Library provides to benefit <u>the community?</u> (Q9)

Community Sample (n=402)
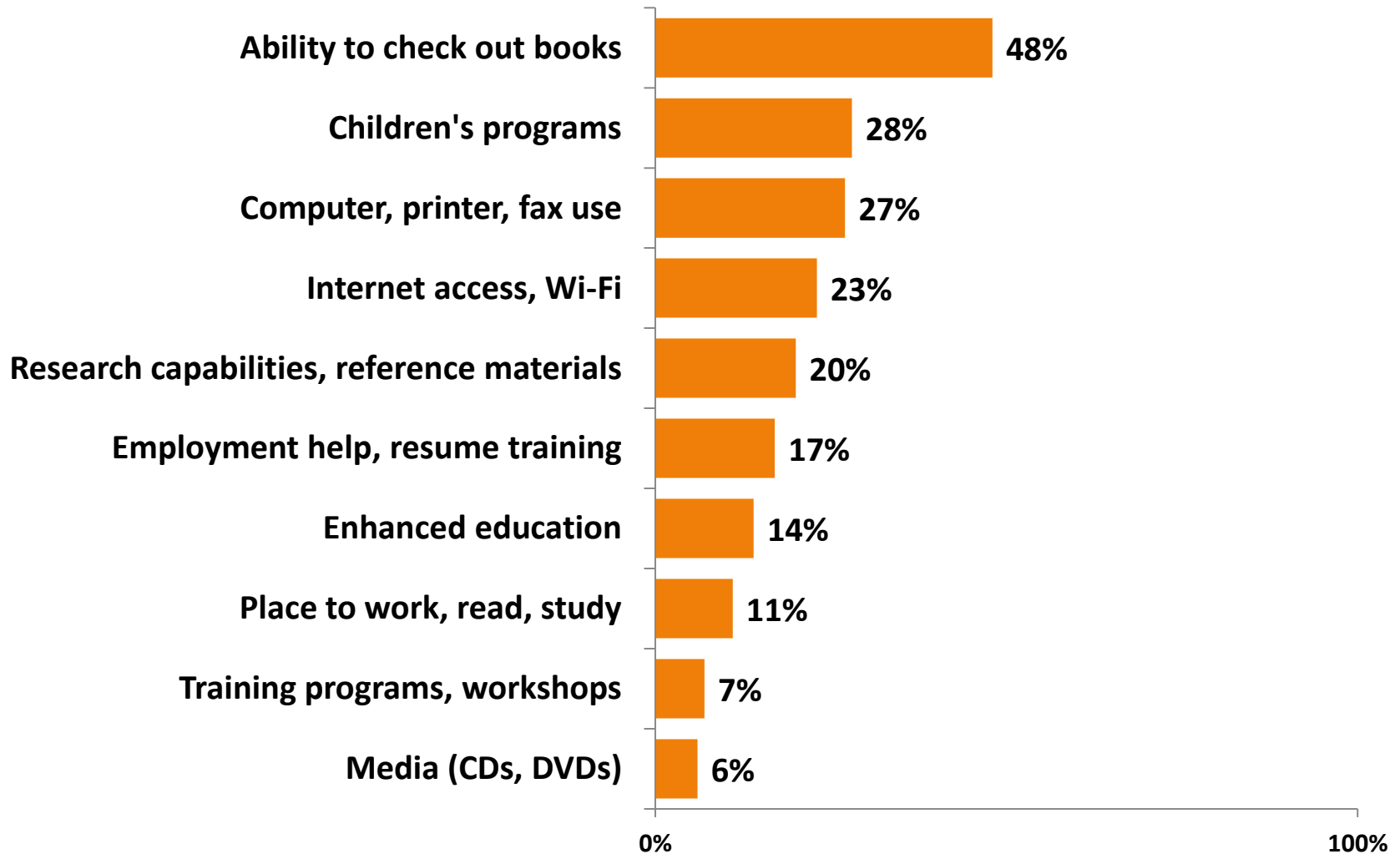
Open-ended (Unaided) Comment Question, Multiple Answers Allowed

Program/Service	Percentage
Ability to check out books	48%
Children's programs	28%
Computer, printer, fax use	27%
Internet access, Wi-Fi	23%
Research capabilities, reference materials	20%
Employment help, resume training	17%
Enhanced education	14%
Place to work, read, study	11%
Training programs, workshops	7%
Media (CDs, DVDs)	6%

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What are the most important programs and services the Charlotte Mecklenburg Library provides to benefit <u>the community?</u> (Q9)

Users vs. Non-Users

Open-ended (Unaided) Comment Question, Multiple Answers Allowed
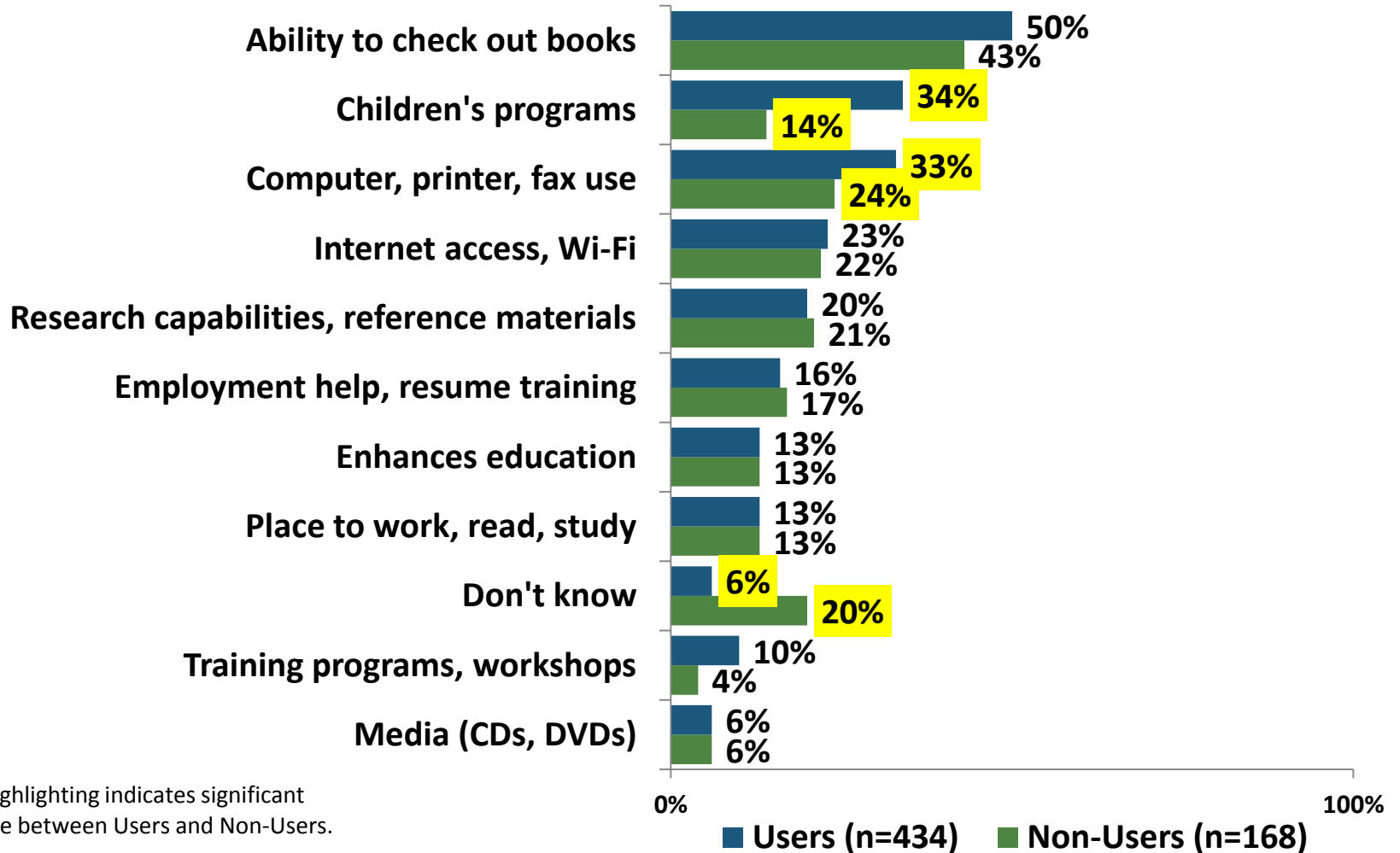
Ability to check out books: Users 50%, Non-Users 43%
Children's programs: Users 34%, Non-Users 14%
Computer, printer, fax use: Users 33%, Non-Users 24%
Internet access, Wi-Fi: Users 23%, Non-Users 22%
Research capabilities, reference materials: Users 20%, Non-Users 21%
Employment help, resume training: Users 16%, Non-Users 17%
Enhances education: Users 13%, Non-Users 13%
Place to work, read, study: Users 13%, Non-Users 13%
Don't know: Users 6%, Non-Users 20%
Training programs, workshops: Users 10%, Non-Users 4%
Media (CDs, DVDs): Users 6%, Non-Users 6%

Yellow highlighting indicates significant difference between Users and Non-Users.

0%   100%

■ **Users (n=434)**   ■ **Non-Users (n=168)**

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What are the most important programs and services the Charlotte Mecklenburg Library provides to benefit <u>you and your family?</u> (Q10)
Community Sample (n=402)
Open-ended (Unaided) Comment Question, Multiple Answers Allowed
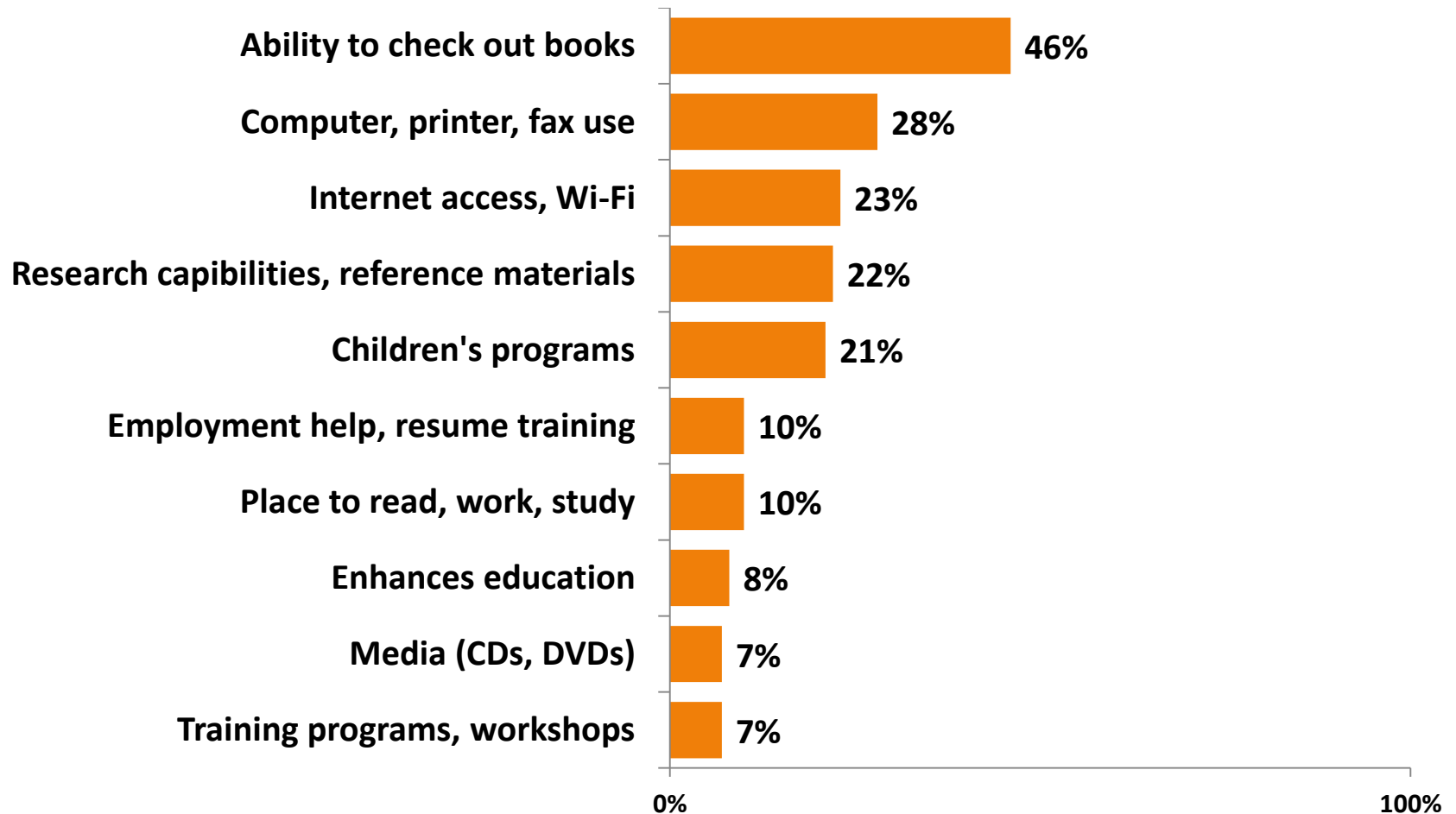
Category	Percentage
Ability to check out books	46%
Computer, printer, fax use	28%
Internet access, Wi-Fi	23%
Research capibilities, reference materials	22%
Children's programs	21%
Employment help, resume training	10%
Place to read, work, study	10%
Enhances education	8%
Media (CDs, DVDs)	7%
Training programs, workshops	7%

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What are the most important programs and services the Charlotte Mecklenburg Library provides to benefit <u>you and your family</u>? (Q10)
Users vs. Non-Users

Program/Service	Users	Non-Users
Ability to check out books	53%	39%
Computer, printer, fax use	30%	24%
Children's programs	29%	13%
Research capibilities, reference materials	22%	21%
Internet access, Wi-Fi	19%	20%
Place to read, work, study	12%	8%
Employment help, resume training	10%	8%
Media (CDs, DVDs)	9%	7%
Training programs, workshops	9%	4%
Enhances education	7%	8%

Yellow highlighting indicates a significant difference between Users and Non-Users.

■ Users (n=434)   ■ Non-Users (n=168)

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Importance of Services Provided by the Charlotte Mecklenburg Library (Q11a-q)
Community Sample (n=402)

Service	10,9=Extremely important	8,7=Important	6,5=Midpoints	4-1=Not important
i. Computer and access to Internet	80%	11%	5%	
h. Services for homework	77%	14%	4%	
a. Printed books	76%	17%	4%	
o. Place to read, work, study	76%	16%	5%	
m. Website	75%	15%	4%	
q. Hours/days of operation	73%	19%	3%	
n. Job search or resume help	73%	13%	6%	
f. Staff to help find books or resources	72%	18%	6%	
g. Services for children, 5 or under	72%	15%	4%	
k. Staff to help with use of computer or Internet	70%	20%	6%	
p. Meeting rooms	69%	16%	9%	5%
e. Reference materials, newspapers, magazines	67%	21%	7%	
j. Free Wi-Fi access	67%	17%	6%	6%
l. Staff-led computer or Internet training	63%	22%	7%	6%
d. eBooks, music, e-audio books to download	50%	30%	10%	6%
b. Audio books and music on CD	49%	28%	13%	8%
c. Movies on DVD	30%	32%	19%	16%

Legend: ■ 10,9=Extremely important ■ 8,7=Important ■ 6,5=Midpoints ■ 4-1=Not important ■ DK

Charlotte Mecklenburg Library

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Importance of Services Provided by the Charlotte Mecklenburg Library (Q11a-q)
Average Ratings on 1 to 10 scale (Don't know dropped from base)

		Community	Users	Non-Users
h.	Homework services	9.3	9.4	9.4
i.	Computer and Internet access	9.3	9.3	9.3
m.	Website	9.2	9.4	9.0
o.	Place to read, work, study	9.2	9.2	9.2
a.	Printed books	9.1	9.3	8.9
q.	Hours and days of operation	9.1	9.3	9.0
f.	Staff to help find books or resources	9.0	9.2	8.8
g.	Services for children, 5 or under	9.0	9.2	9.1
k.	Staff to help with computer or Internet	9.0	9.0	8.9
n.	Job search or resume help	9.0	9.0	9,1
j.	Free Wi-Fi access	8.9	9.1	8.9
l.	Staff-led computer or Internet training	8.9	8.9	8.9
p.	Meeting rooms	8.8	9.0	8.6
e.	Reference materials, newspapers, magazines	8.7	8.8	8.5
d.	eBooks, music, e-audio books to download	8.2	8.4	7.8
b.	Audio books and music on CD	8.1	8.1	7.9
c.	Movies on DVD	7.0	7.2	6.8

Yellow highlighting indicates a significant difference between Users and Non-Users.

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How important is it to establish or maintain Library branches in economically challenged areas? (Q14)
Community Sample (n=402)
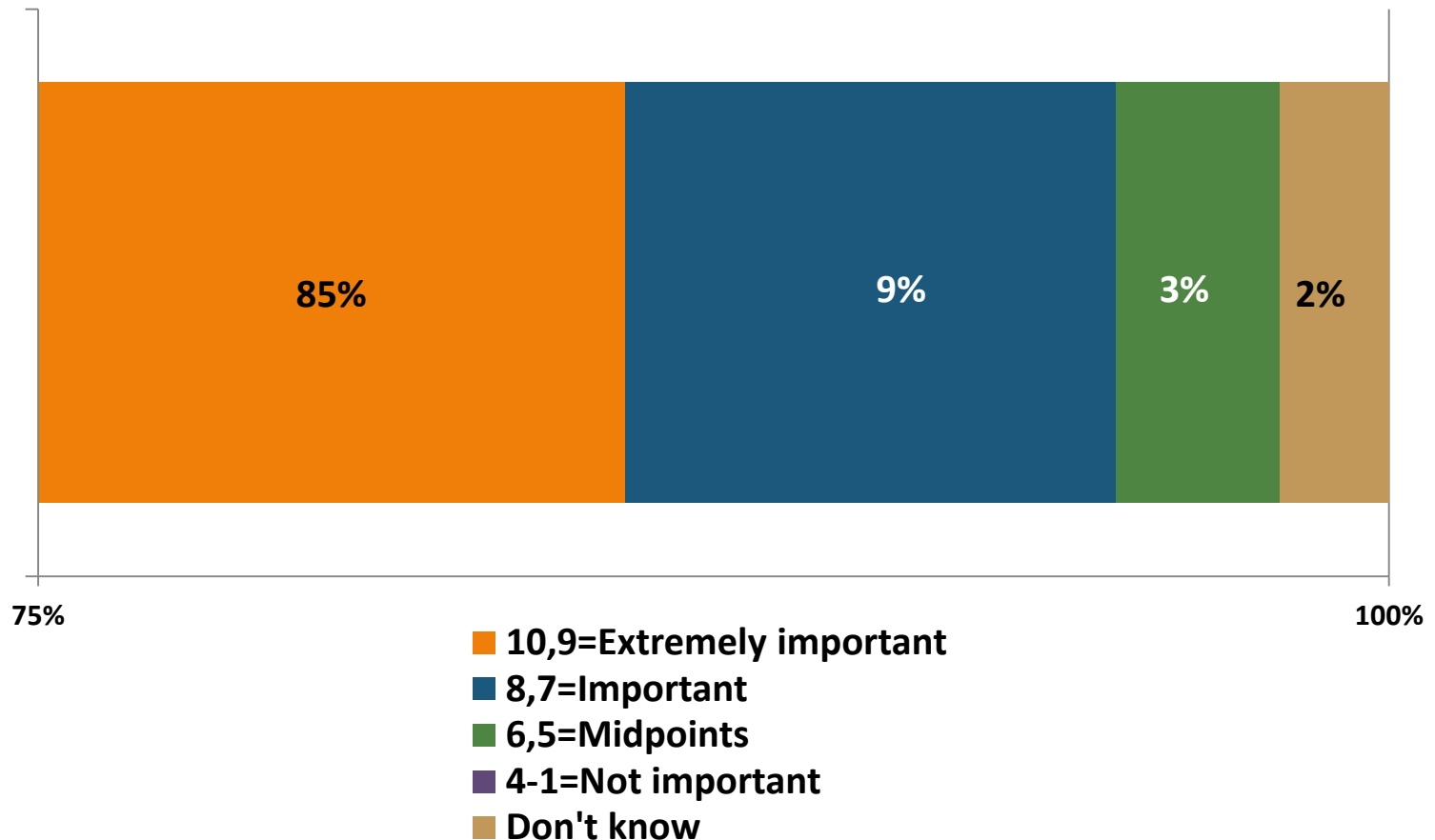
Bar chart showing:
- **85%** — 10,9=Extremely important (orange)
- **9%** — 8,7=Important (blue)
- **3%** — 6,5=Midpoints (green)
- **2%** — Don't know (tan)

Legend:
- 🟧 10,9=Extremely important
- 🟦 8,7=Important
- 🟩 6,5=Midpoints
- 🟪 4-1=Not important
- 🟫 Don't know

Axis: 75% — 100%

Charlotte Mecklenburg Library

MarketWise

How important is it to establish or maintain Library branches in economically challenged areas? (Q14)
Users vs. Non-Users

Percent Rating 9 or 10 (Extremely Important)

Users (n=434) — 88%

Non-users (n=168) — 82%

0%　　　　　　　　　　　　　　　　　　　100%

Objective

Quantify Awareness of the Need for

Private Donations and Likelihood of Donating

Are you aware that Charlotte Mecklenburg Library needs and requests private money to enhance programs and services? (Q15)
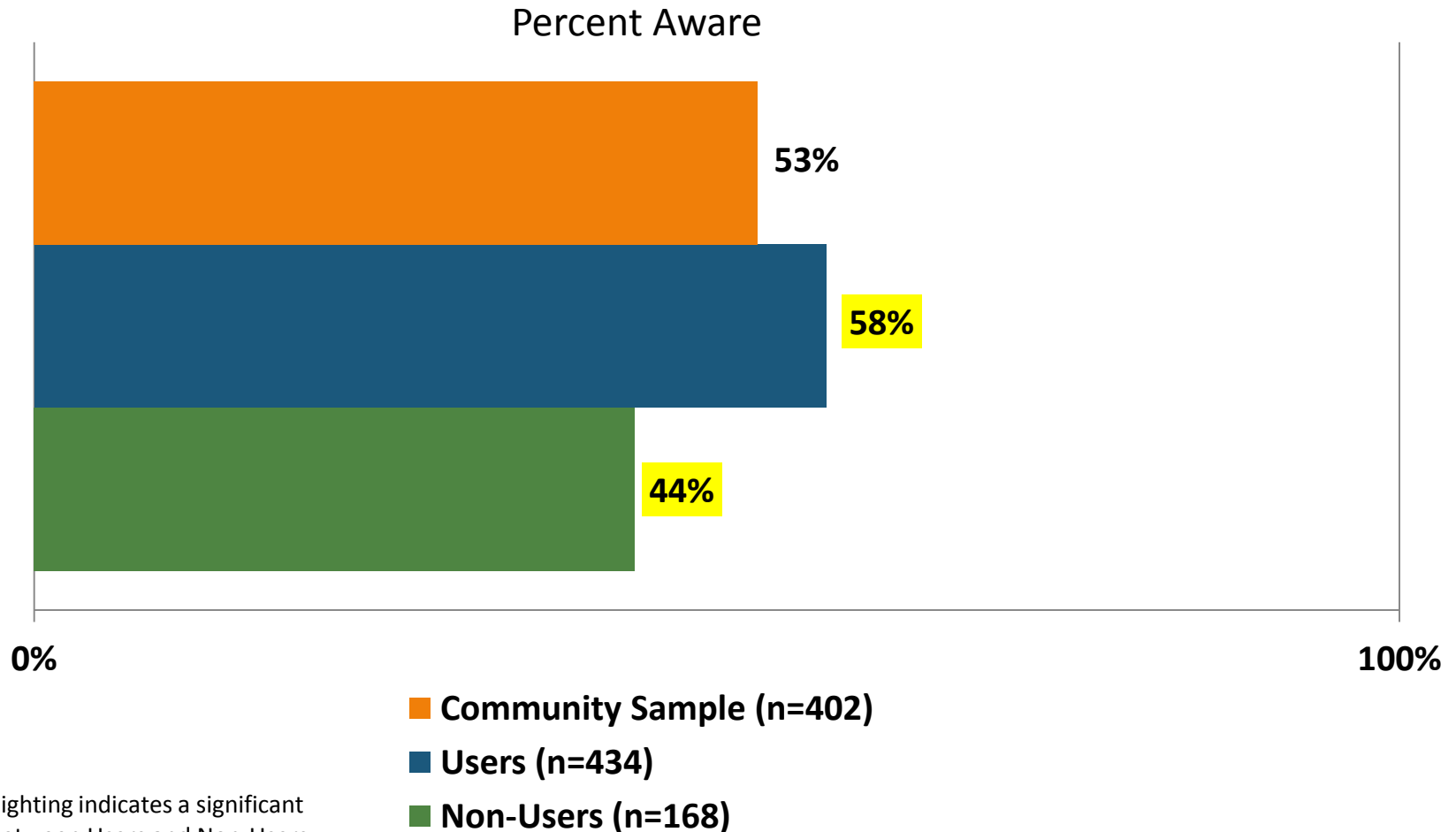
Percent Aware

- 53% — Community Sample (n=402)
- 58% — Users (n=434)
- 44% — Non-Users (n=168)

0%   100%

Community Sample (n=402)
Users (n=434)
Non-Users (n=168)

Yellow highlighting indicates a significant difference between Users and Non-Users.

Charlotte Mecklenburg Library

MarketWise

Over the next 12 months, how likely are you to support the Library by giving a private monetary donation? (Q16)
Community Sample (n=402)

| 11% | 24% | 35% | 28% | 1% |

0% 25% 50% 75% 100%
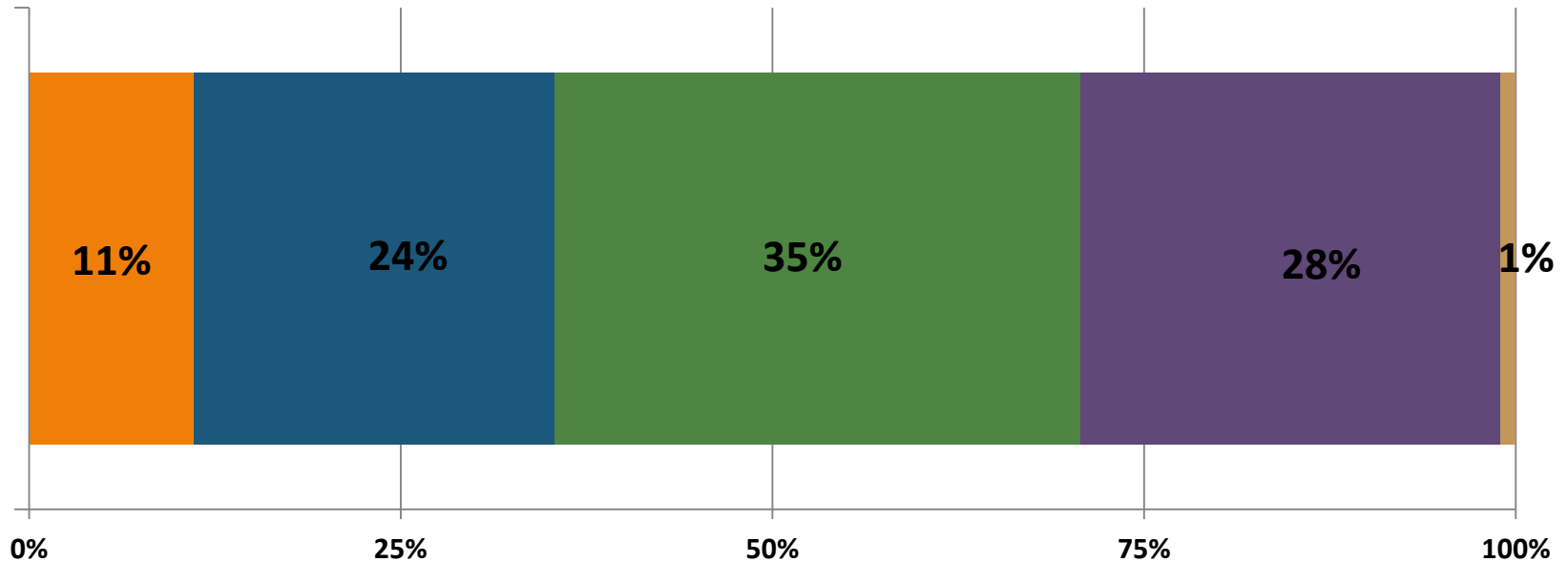
- 🟧 5=Extremely Likely
- 🟦 4=Somewhat likely
- 🟩 3=50/50 chance
- 🟪 2,1=Not likely
- 🟫 Don't know

In the 2010 Survey for the Future of the Library Task force, 18% of respondents indicated they would definitely make a donation.

Charlotte Mecklenburg Library

MarketWise

Over the next 12 months, how likely are you to support the Charlotte Mecklenburg Library by giving a private monetary donation?(Q16)
Users vs. Non-users

	5=Extremely likely	4=Somewhat likely	3=50/50 chance	2-1=Not likely	Don't know
Users (n=434)	12%	32%	36%	19%	1%
Non-users (n=168)	10%	15%	33%	41%	2%
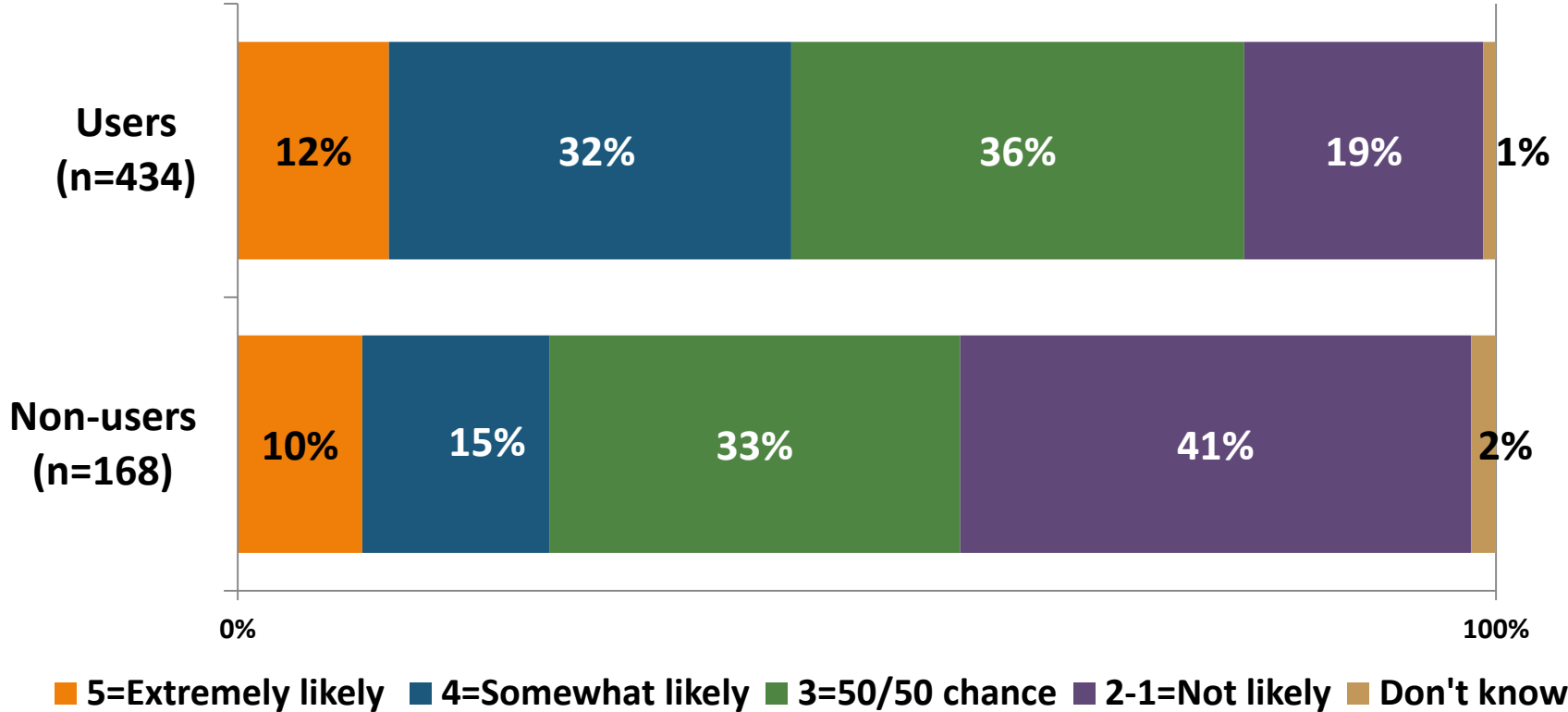
In the 2010 Survey for the Future of the Library Task force, 21% of users and 8% of non-users indicated they would definitely make a donation.

Charlotte Mecklenburg Library

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MarketWise

Objective

Determine Percentage of Library Users

in Charlotte Mecklenburg

Charlotte Mecklenburg Library

MarketWise

Charlotte Mecklenburg
Library Users, Past 12 Months (Q17-18)
Community Sample (n=402)

41% **59%**

■ **Users (n=434)**
■ **Non-users (n=168)**
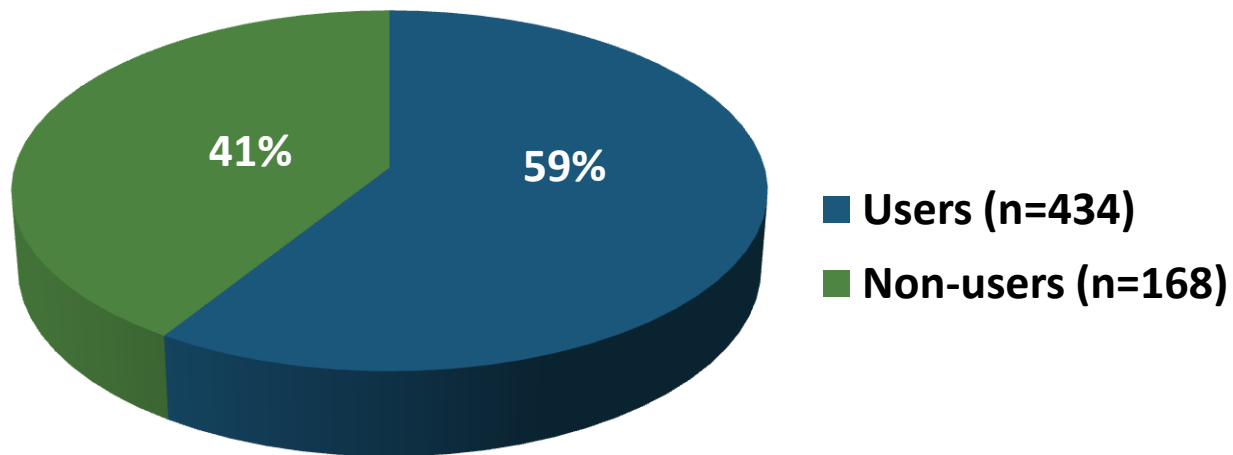
Over the past 12 months, 7% of the community sample used the Library only to vote. For the purpose of this research, these respondents are included with non-users.

In the 2010 survey for the Future of the Library Task Force , 76% had used the Library.

Charlotte Mecklenburg Library

MarketWise

Objective

Examine Reasons for Not Using the Charlotte Mecklenburg Library

Charlotte Mecklenburg Library

MarketWise

Are any of the following reasons you do not currently use the Library? (Q19a-m)
Non-Users (n=168)

Reason	Percentage
g. Get information from Internet	65%
c. Too busy or don't have time	57%
a. No need or interest	51%
l. Purchase materials rather than borrow	46%
b. Not aware of programs and services	33%
f. Hours and days are not convenient	18%
j. Limited by age, health or mobility issues	15%
e. Locations are not convenient	13%
k. No transportation to Library	11%
d. Don't know where a Library is located	10%
h. New to area	8%
i. Don't like to read or can't read	5%
m. Don't speak English (Speak Spanish)	3%

Among total non-users, 7% speak Spanish only. Only 3% of total non-users indicate that not speaking English is a reason for not using the Library.

Charlotte Mecklenburg Library

MarketWise

What is the one most important reason you do not use the Charlotte Mecklenburg Library (Q20)
Non-Users (n=168)

Open-ended comment question

Reason	Percentage
Too busy, no time	28%
No interest, no need	24%
Get information from internet	9%
Limited by health, mobility	8%
Use other non-public library	5%
No transportation	4%
Don't read or like to read	2%
Purchase materials instead	2%
Bad experience	2%
Lack of availability of resources	2%
No particular reason, don't know	8%

Charlotte Mecklenburg Library

MarketWise
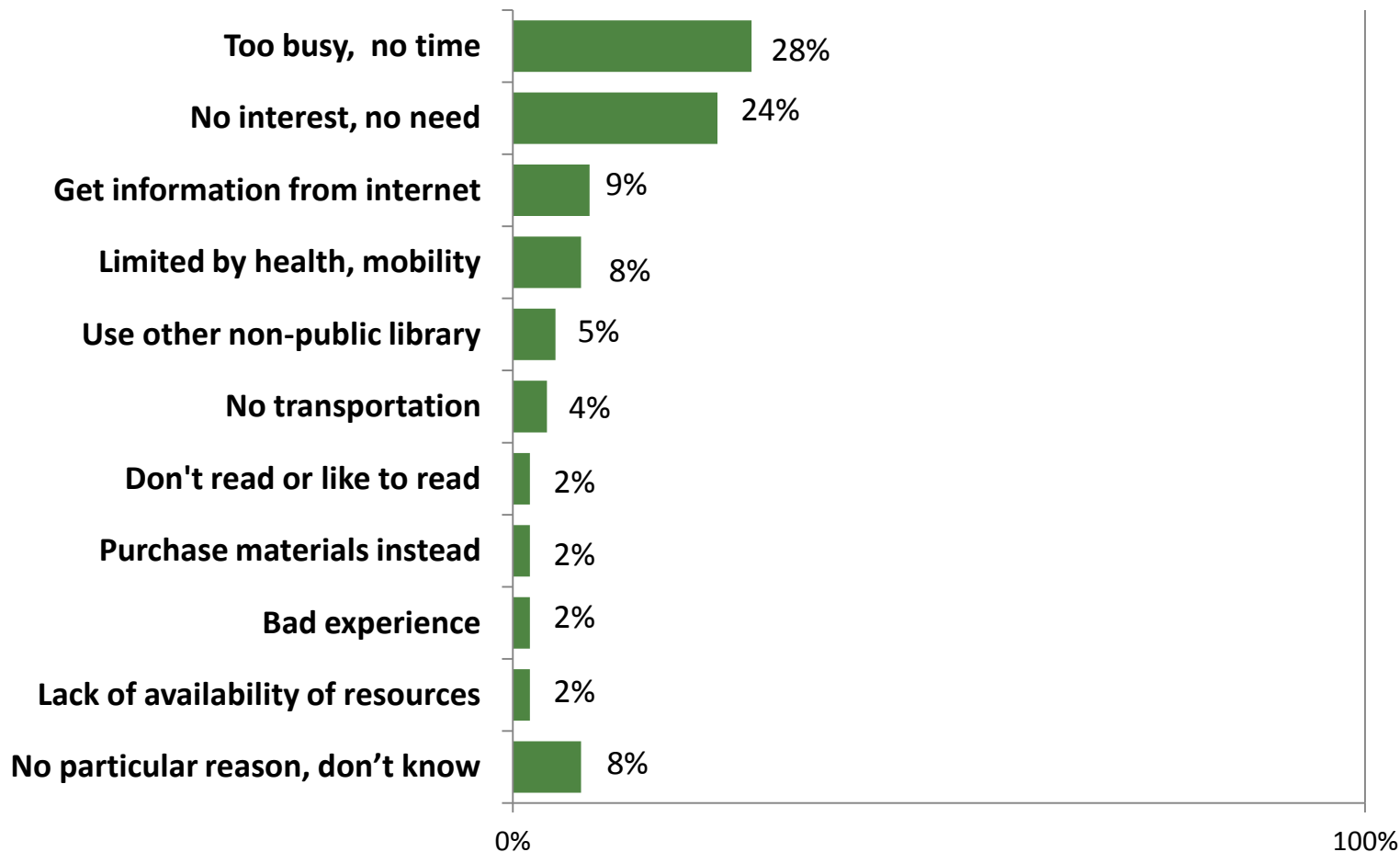
Would you use the Charlotte Mecklenburg Library if the hours and days were more convenient? (Q21b)
Non-Users (n=168)

- 37% Yes
- 47% No
- 16% Maybe/Don't know

Charlotte Mecklenburg Library

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MarketWise

Objective

Examine Library Use
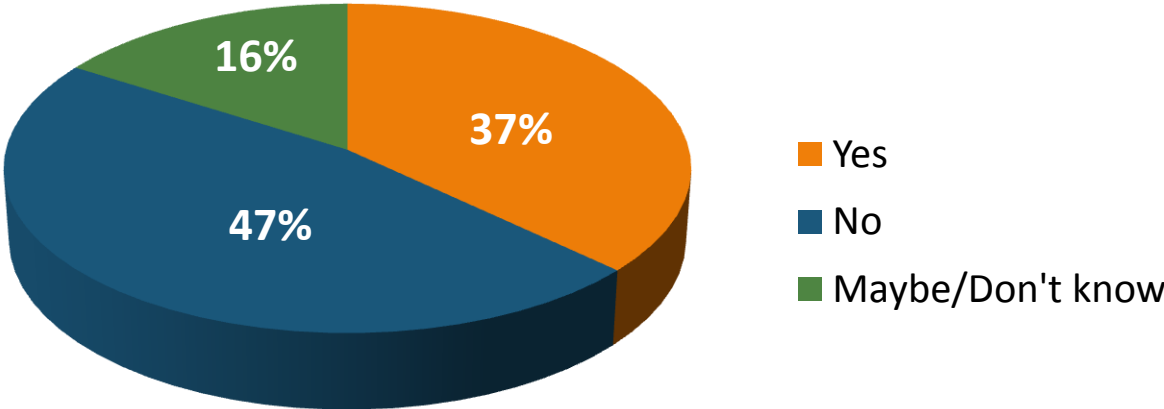
Charlotte Mecklenburg Library

MarketWise

Library Services Used in the Past 12 Months (Q31a-p)
Users (n=434)

Almost all Library users have visited a Charlotte Mecklenburg Library in person in the past 12 months. 15% have used it by telephone and 56% have used the Website. (Q22)

Service	Percentage
f. Used staff to help find books or resources	77%
a. Checked out printed books	70%
o. Used as place to read, work, study	70%
e. Used reference materials, newspapers, magazines	61%
i. Used computer or access to Internet	58%
m. Used Website	56%
p. Used meeting rooms	49%
k. Used staff to help with use of computer or Internet	39%
j. Used free Wi-Fi access	38%
h. Used services for homework for school aged children	29%
b. Checked out audio books and music on CD	26%
c. Checked out movies on DVD	25%
n. Used for job search or resume help	24%
g. Used services for children, 5 or under	23%
d. Downloaded eBooks, music and e-audio books	13%
l. Used staff-led computer or Internet training	9%

Charlotte Mecklenburg Library

47

MarketWise

What is the primary way you use the Library? (Q32)
Users (n=434)
Open-ended comment question. One answer allowed.

Category	Percentage
Check out books	39%
Place to read, work, study	19%
For research or reference materials	9%
Children's programs	8%
For computer, printer, fax	7%
Internet/Wi-Fi	5%
Employment help	4%
Meeting rooms, including voting	3%
Audio book rental	1%
No particular way	3%

Charlotte Mecklenburg Library

MarketWise
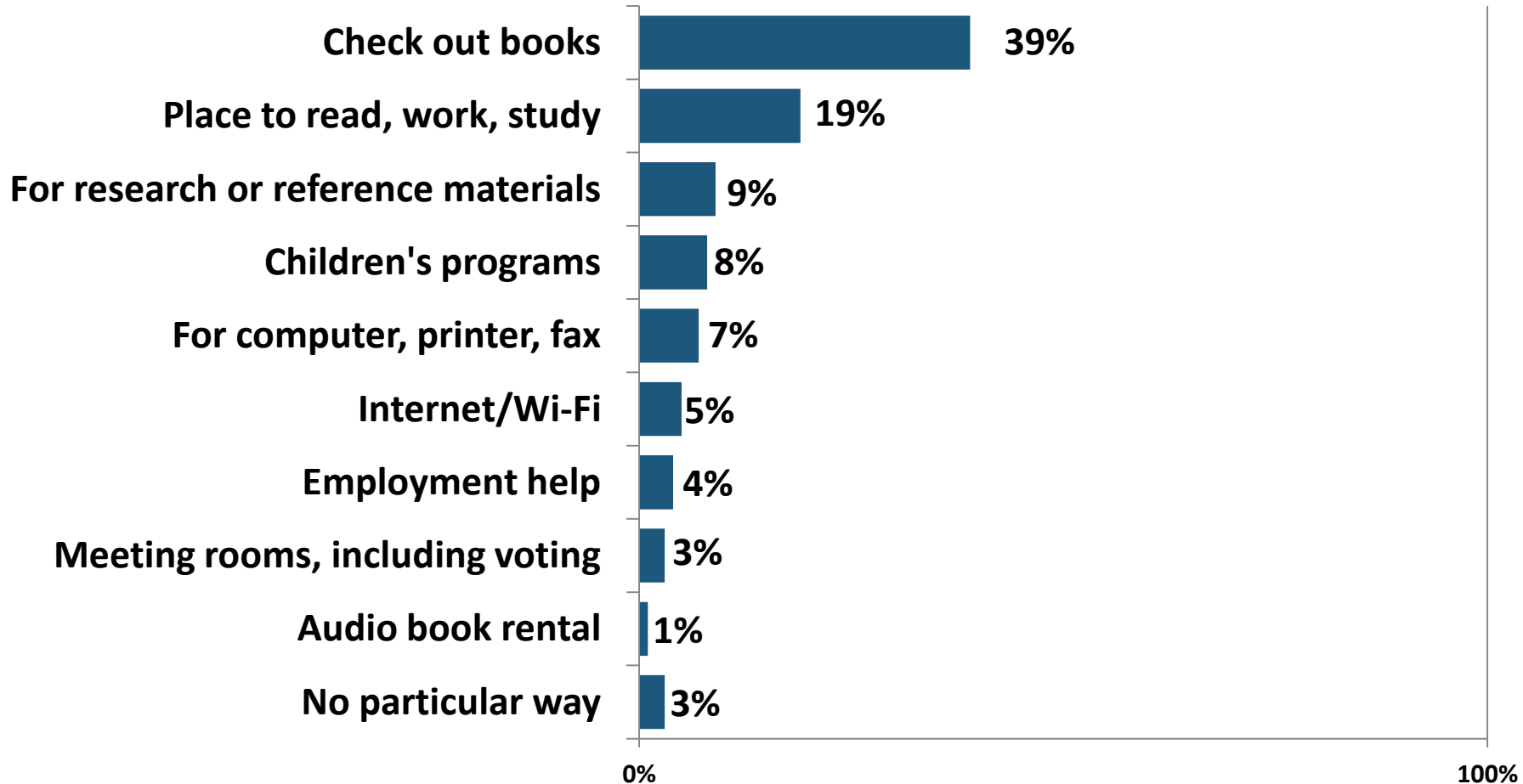
Would you visit and use the Library more if hours or days were increased, or are the current hours and days of operation sufficient? (Q23)
Users (n=434)

- **More if hours and days increased** — 42%
- **Current hours and days are sufficient** — 55%
- **Don't know** — 3%

Charlotte Mecklenburg Library

MarketWise
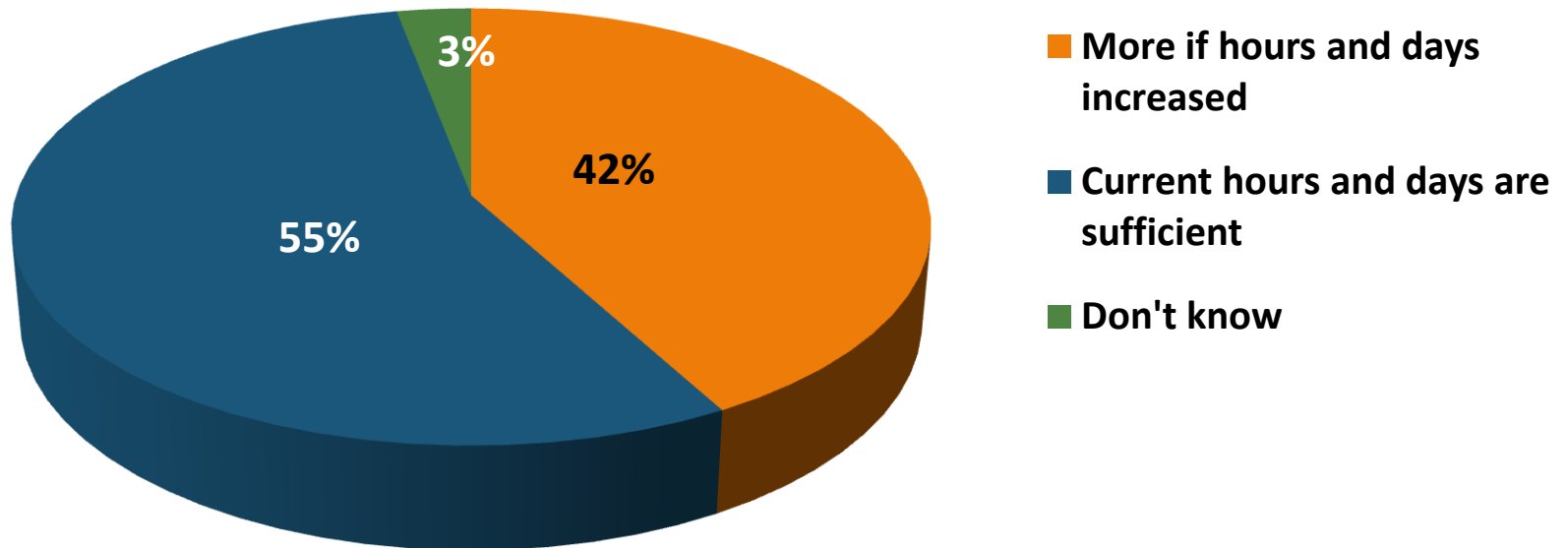
If Library funding increased and hours of operation could be expanded which would you prefer? (Q24)
Users (n=434)

Bar chart showing responses:
- Keep same hours, but open an additional day: 45%
- Keep same days, open additional hours in evening: 38%
- Don't know which prefer: 11%
- Keep same days, open additional hours in morning: 6%

Charlotte Mecklenburg Library

MarketWise
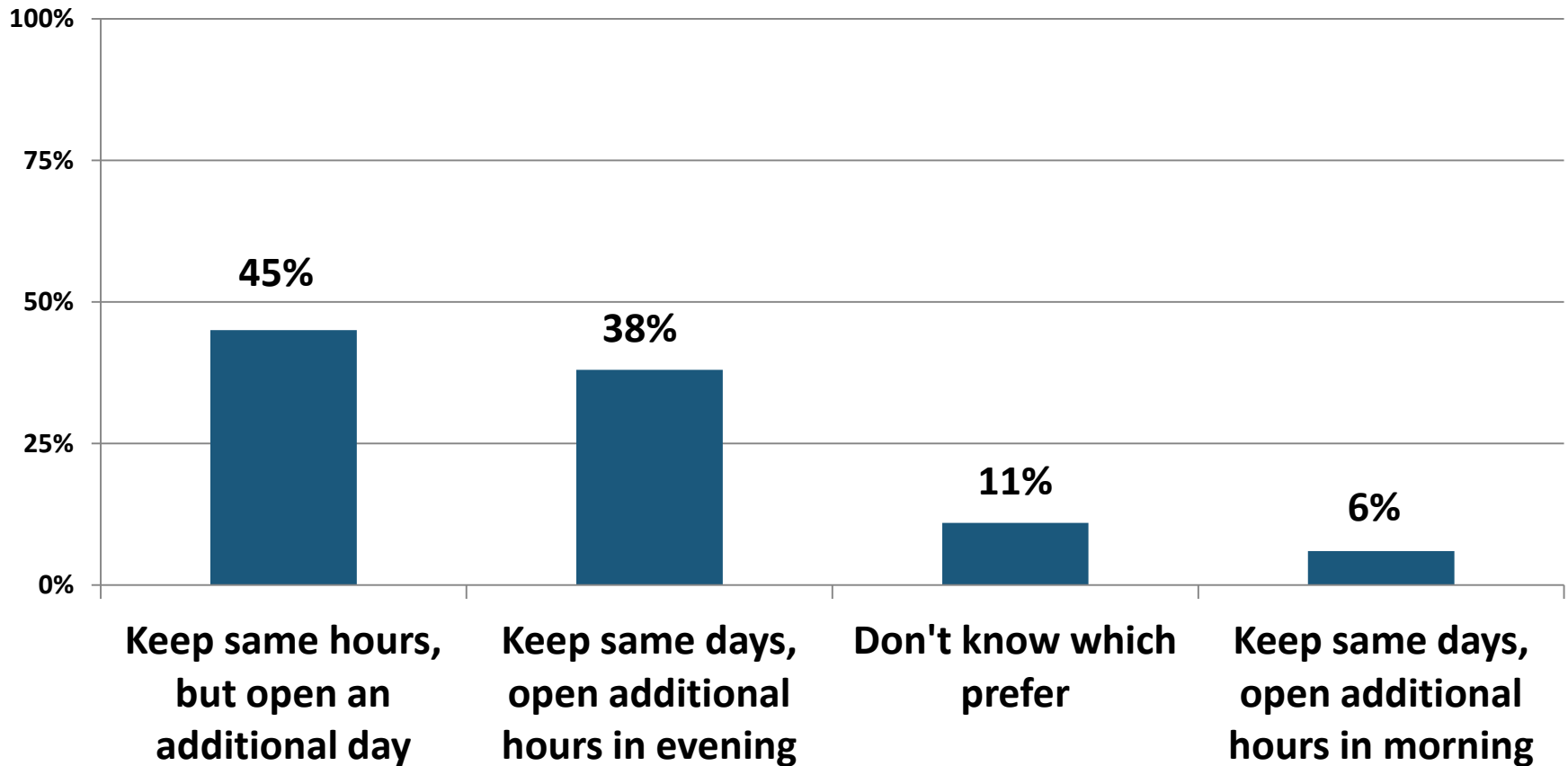
Do you have children under age 18, who have used the Library in the Past 12 months? (Q25)
Users (n=434)

47% Yes

53% No/DK

Charlotte Mecklenburg Library

MarketWise
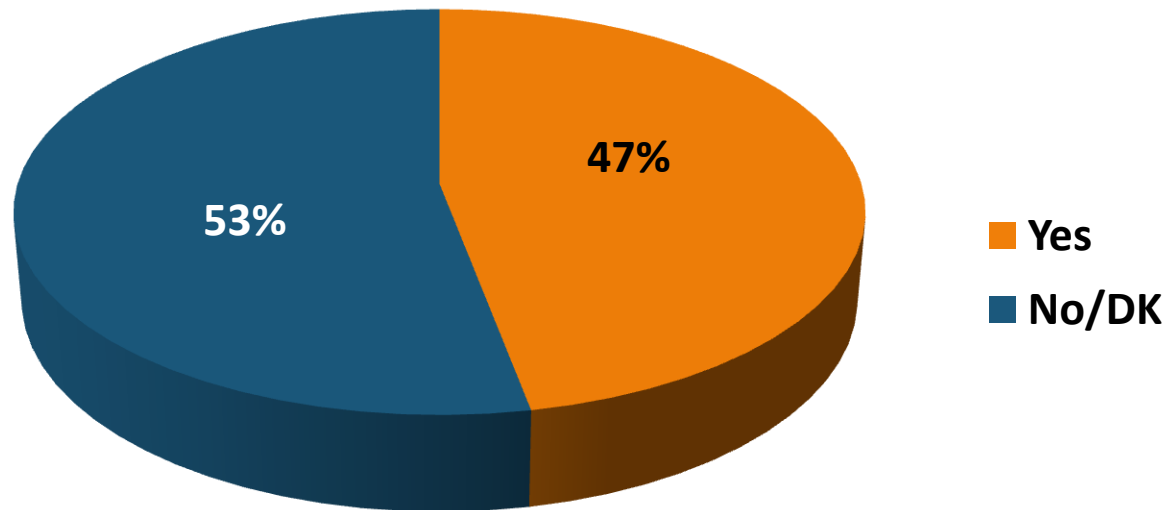
Are there any other adults in your household who have visited or used the Library in the past 12 months? (Q26)
Users (n=434)

39%

61%

Yes

No/DK

Charlotte Mecklenburg Library

MarketWise
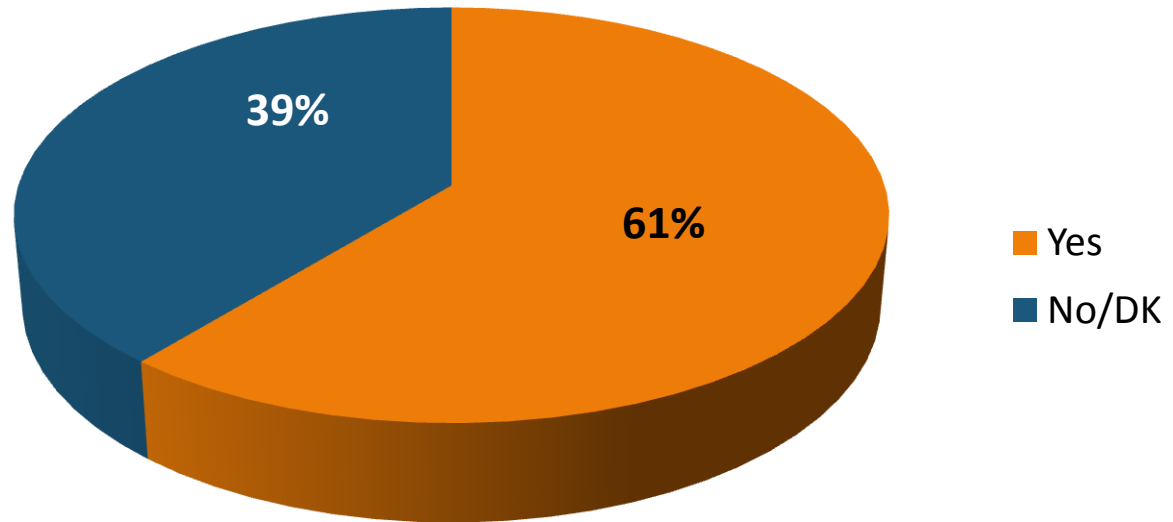
In a typical month, approximately how many times have you visited or used the Charlotte Mecklenburg Library in any way? (Q27)
Users (n=434)

Five times or more — 30%

Three or four times — 25%

Once or twice — 26%

Less than once a month — 2%

Don't know, no typical amount — 7%

Average = 5 times a month

0%   100%

Charlotte Mecklenburg Library

MarketWise
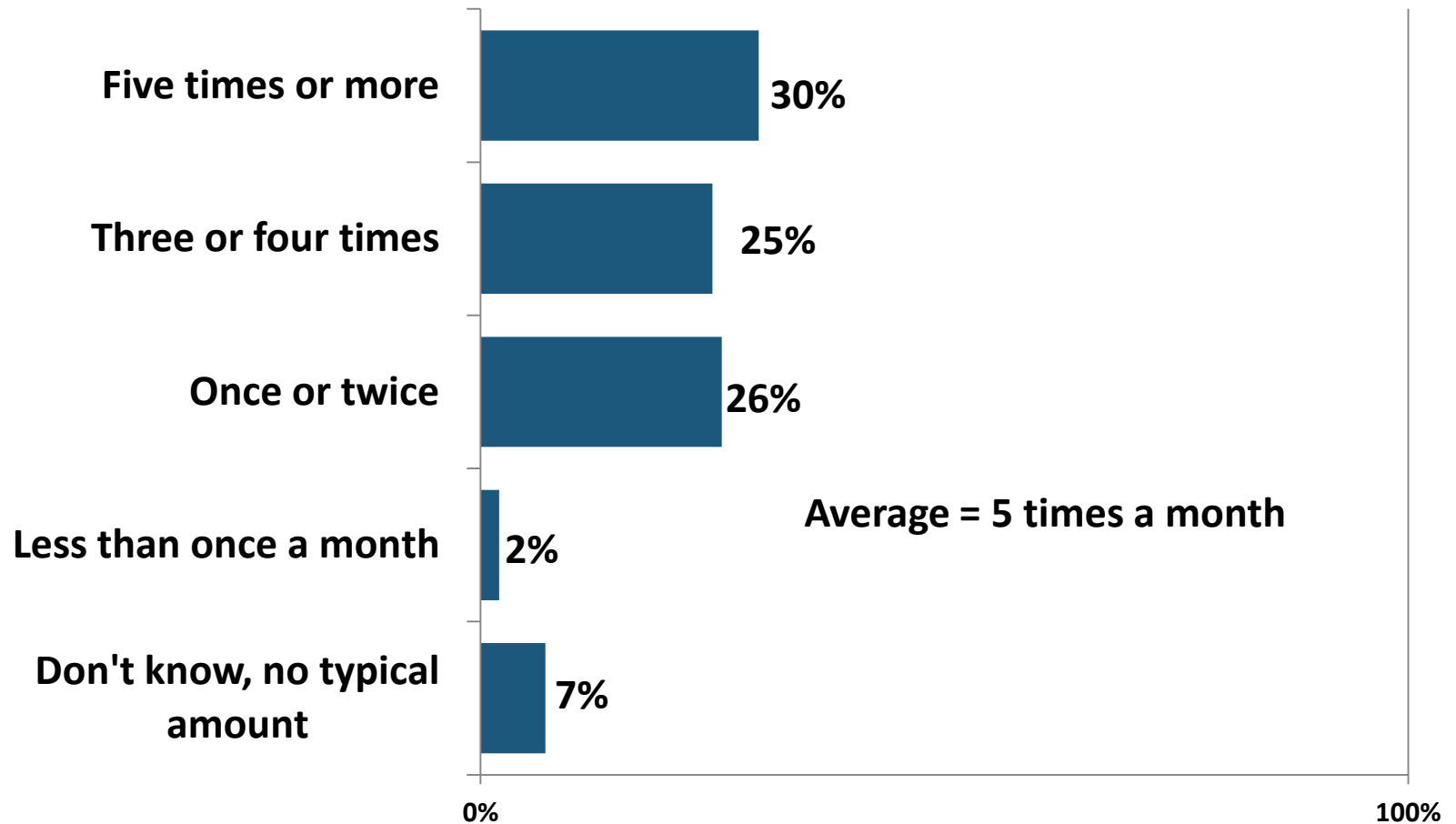
Which location of the Library have you used most in the past year? (Q28)
Users (n=434)

Location	Percentage
South County Regional	12%
University City Regional	12%
Main Library	9%
Morrison Regional	8%
Beatties Ford Road Regional	6%
North County Regional	6%
Steele Creek	6%
Independence Regional	5%
Matthews	5%
Scaleybark	5%
Hickory Grove	4%
Plaza Midwood	4%
Mountain Island	3%
Sugar Creek	3%
West Boulevard	3%
Davidson	2%
ImaginOn	2%
Mint Hill	2%
Cornelius	1%
Myers Park	1%

Charlotte Mecklenburg Library

MarketWise

From where your trip usually begins, approximately how many minutes does it typically take to get to the branch you use most? (Q29)
Users (n=434)

- 5 minutes or less — 29%
- 6-10 minutes — 41%
- 11-15 minutes — 18%
- 15-20 minutes — 6%
- More than 20 minutes — 5%
- Don't know — 1%

Average = 11 minutes

0%   100%

MarketWise
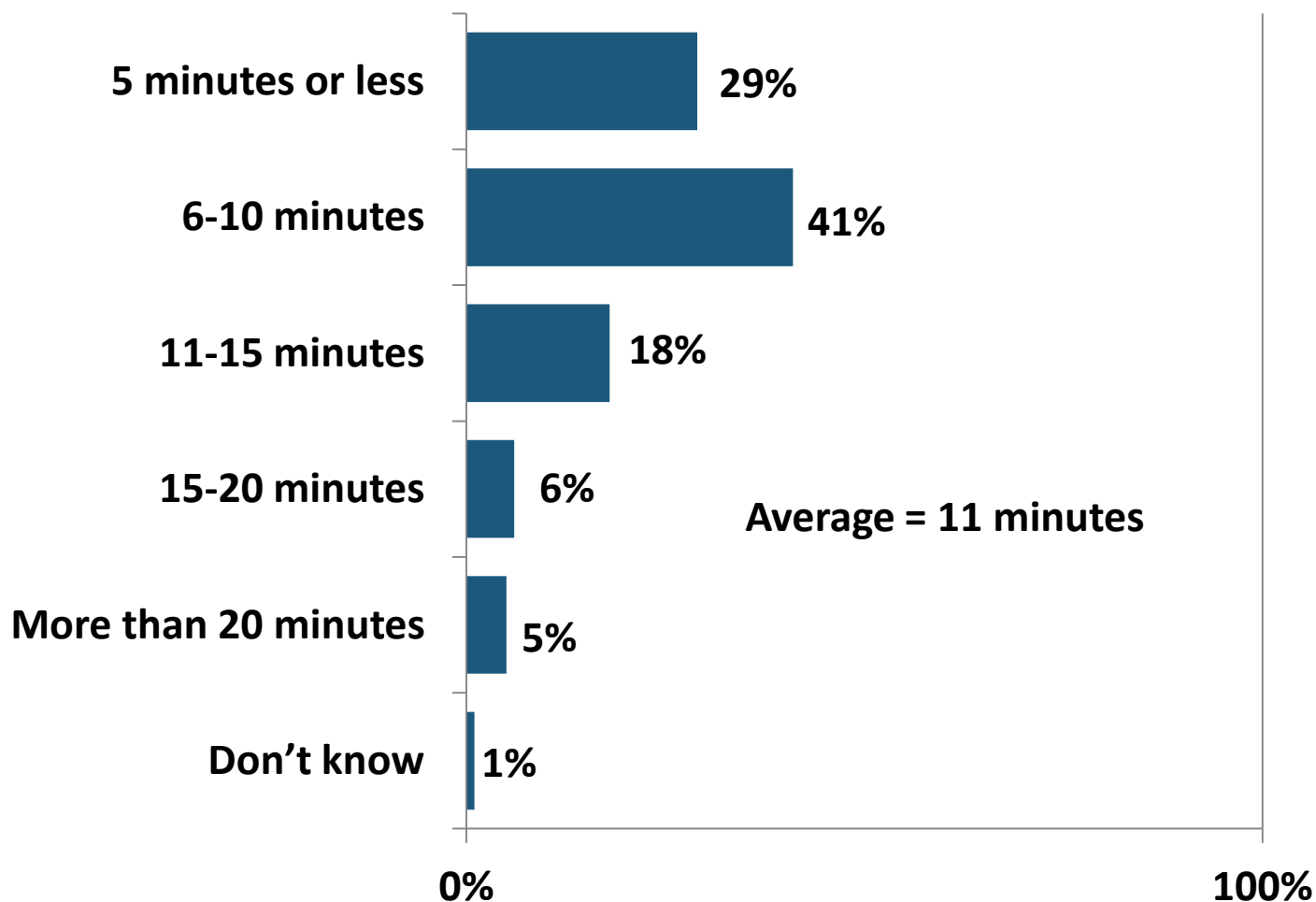
Is the branch you use most, the one that is closest to your home? (Q30)
Users (n=434)

- Yes — 81%
- No/DK — 19%

Charlotte Mecklenburg Library

MarketWise
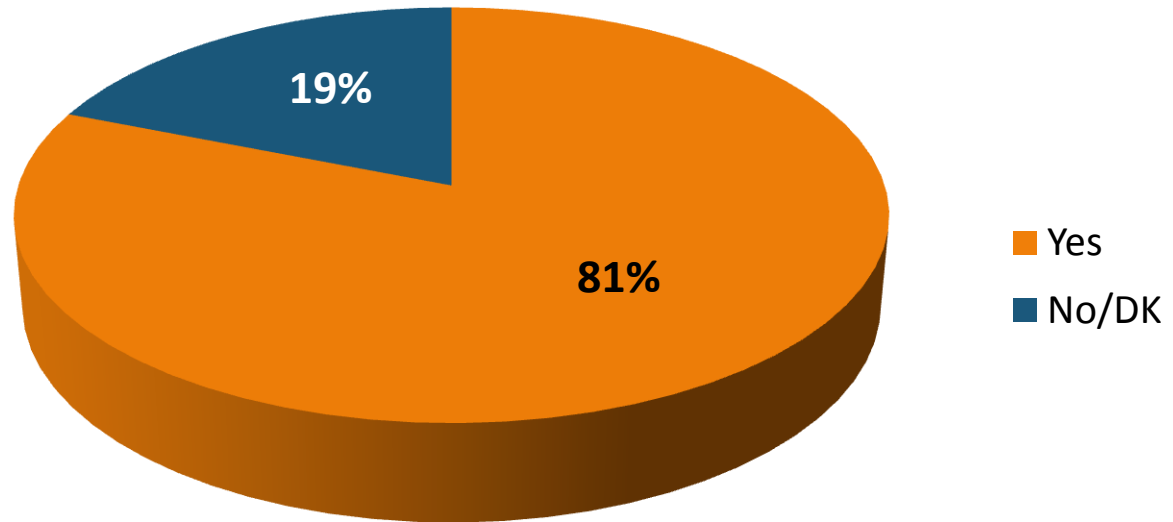
Objective

**Quantify Performance
of the Charlotte Mecklenburg Library**

MarketWise

Thinking about the past 12 months, how do you rate the Charlotte Mecklenburg Library overall? (Q12)
Community Sample (n=402)

53% **32%** **5%** **2%** **8%**
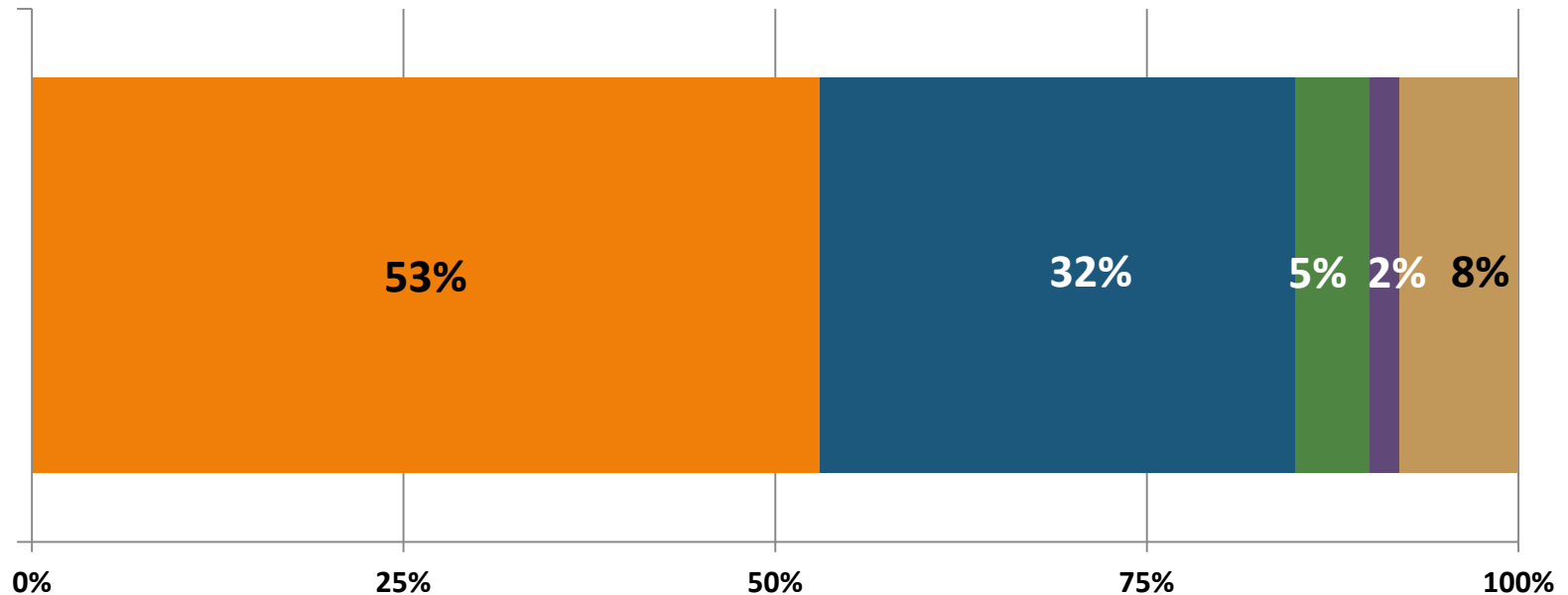
■ **10,9= Very good**　■ **8,7=Good**　■ **6,5=Midpoints**　■ **4-1=Poor or very poor**　■ **Don't know**

Average=8.6

Charlotte Mecklenburg Library

MarketWise

Thinking about the past 12 months, how do you rate the Charlotte Mecklenburg Library overall? (Q12)
Users vs. Non-Users

Users (n=434): 58% | 34% | 5% — Average=8.6

Non-Users (n=168): 47% | 27% | 6% | 2% | 18% — Average=8.6

0% — 100%

Legend:
- 10,9= Very good
- 8-7=Good
- 6-5=Midpoints
- 4-1=Poor or very poor
- Don't know
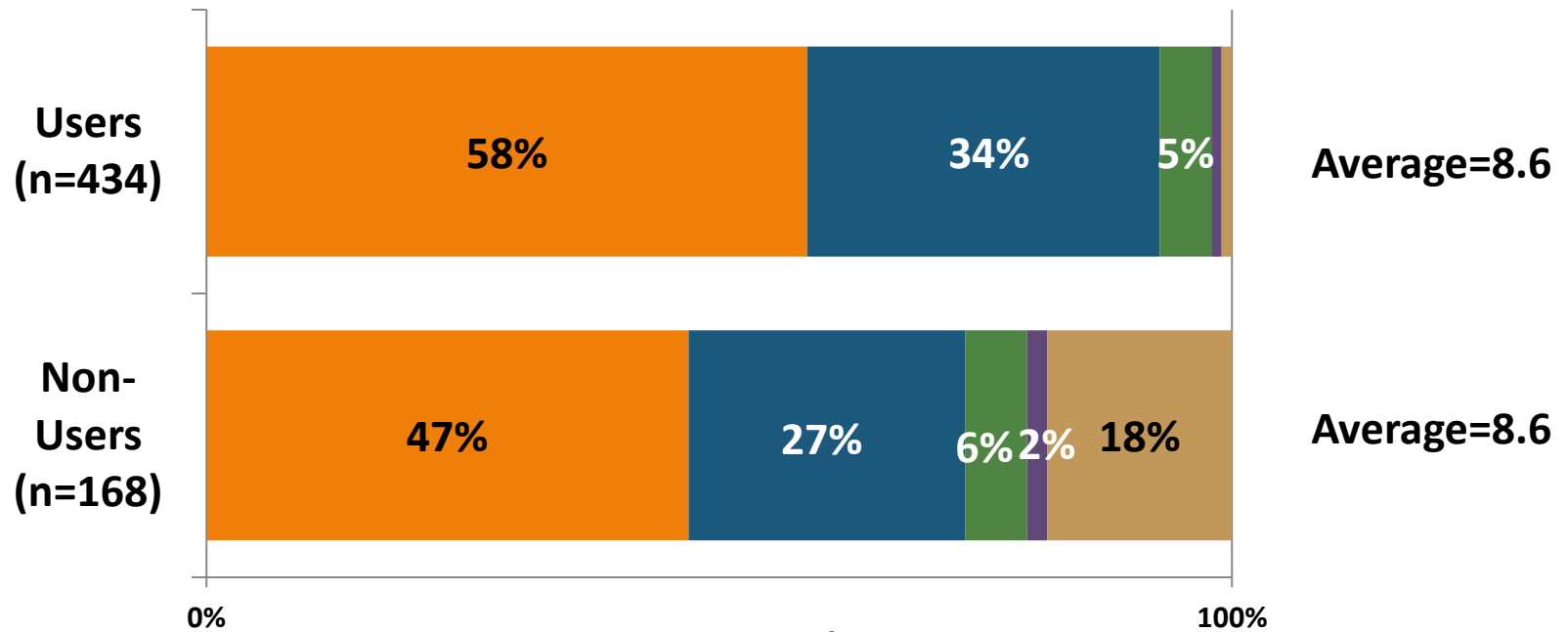
Note:
If "don't know" responses are dropped from the base of non-users, then **58%** of non-users give top ratings of 9 or 10.

Charlotte Mecklenburg Library

MarketWise

How likely are you to recommend the Charlotte Mecklenburg Library to someone who lives in this community? (Q13)
Community Sample (n=402)

Research has shown that willingness to promote an organization to friends, colleagues and customers is a very strong indicator of loyalty.
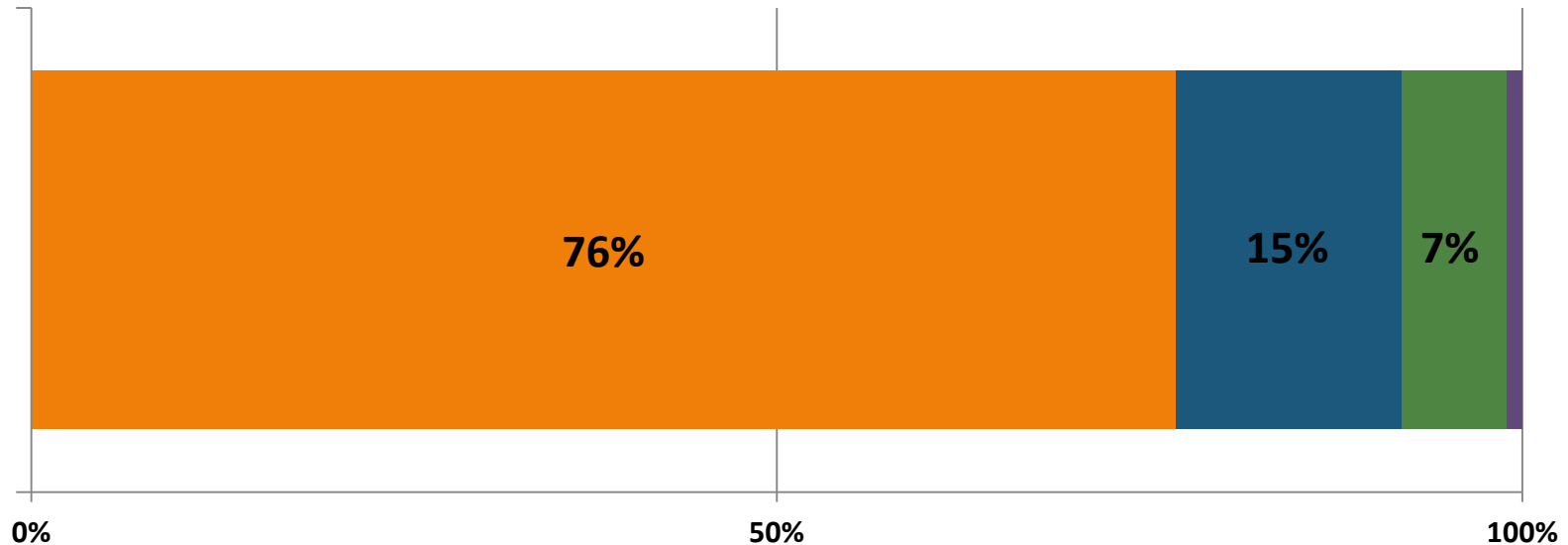
■ 10-9=Promoters (Extremely likely)
■ 8-7=Passively satisfied (Somewhat likely)
■ 6-0=Detractors (Not likely)
■ Don't know

Net Promoter Score = 69

Charlotte Mecklenburg Library

MarketWise

How likely are you to recommend the Charlotte Mecklenburg Library to someone who lives in this community? (Q13)
Users vs. Non-Users

Users (n=434): 82% | 14% | 5% — Net Promoter Score = 77

Non-Users (n=168): 69% | 18% | 11% | 2% — Net Promoter Score = 58

0% — 100%

- 🟧 **10,9=Promoters**
- 🟦 **8,7=Passively satisfied**
- 🟩 **6-0=Detractors**
- 🟪 **Don't know**
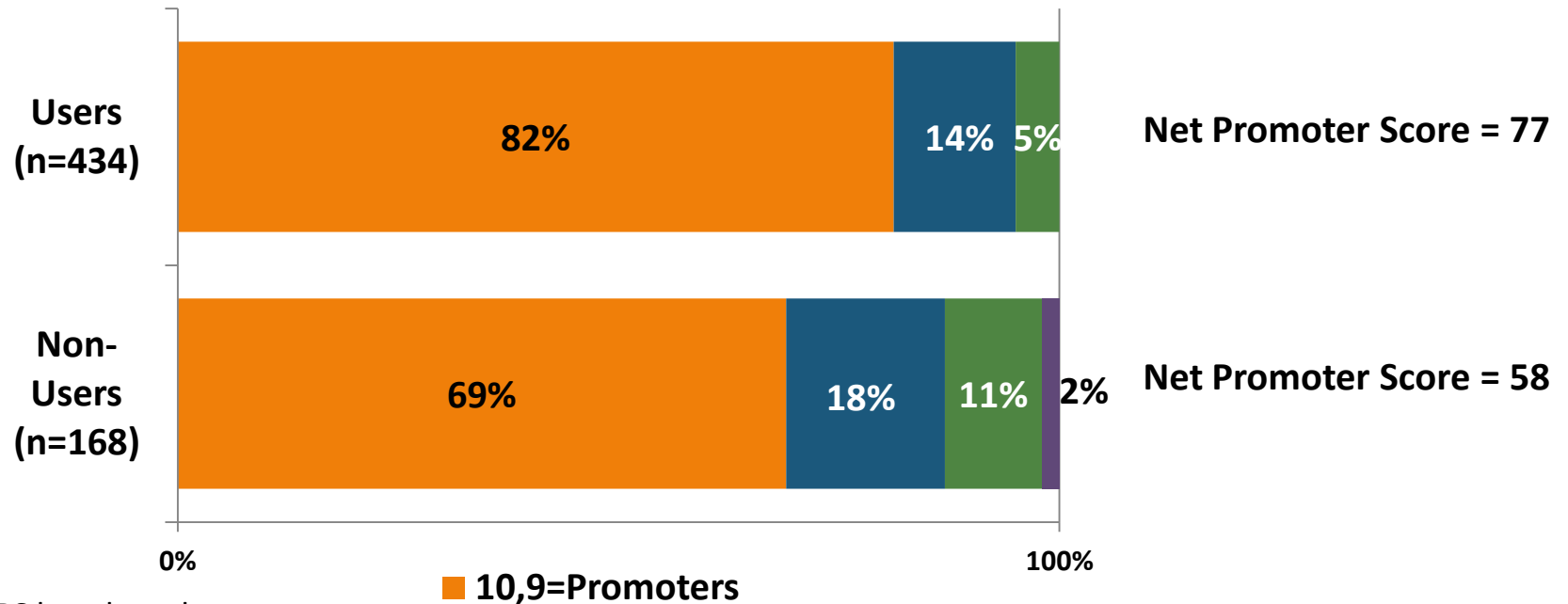
2012 NPS benchmarks:
USAA Banking= 83
Amazon.com=76
USAA Auto Insurance=73
Trader Joe's=73
Costco=71

**The net promoter score for Library users (77) is extremely high.
A score of 75 or higher is considered world class.**

Charlotte Mecklenburg Library

MarketWise

Performance of the Charlotte Mecklenburg Library on Library Services (Q33a-q)
Users (n=434)

Service	10,9=Very good	8,7=Good	6,5=Midpoints	4-1=Poor	Don't know
o. Place to read, work, study	72%	15%	3%		8%
f. Staff to help fing books or resources	65%	21%	7%		6%
i. Computer and access to Internet	58%	20%	3%		17%
k. Staff to help with use of computer or Internet	58%	15%	6%		20%
a. Printed books	56%	32%	7%		
m. Website	56%	15%	3%		25%
p. Meeting rooms	55%	11%	5%		28%
j. Free Wi-Fi access	54%	9%	3%		32%
e. Reference materials, newspapers, magazines	49%	25%	5%		20%
q. Hours/days of operation	42%	31%	17%	5%	5%
h. Services for homework	33%	13%	4%		49%
n. Job search or resume help	33%	10%	3%		52%
g. Services for children, 5 or under	32%	12%	4%		51%
b. Audio books & music on CDs	30%	22%	8%	3%	30%
c. Movies on DVDs	27%	20%	12%	3%	38%
l. Staff-led computer or Internet training	26%	9%	4%		60%
d. eBooks, music & eAudio books to download	23%	18%	8%	3%	48%

Many users are not able to rate specific services.

■ 10,9=Very good ■ 8,7=Good ■ 6,5=Midpoints ■ 4-1=Poor ■ Don't know

Charlotte Mecklenburg Library

MarketWise

Importance vs. Performance of Services Provided by the Charlotte Mecklenburg Library (Q11a-q & 33a-q)
Users (Able to Rate)
(Don't know responses dropped)

Percentage Rating 9 or 10 (Extremely Important)

Service	Importance (DK dropped)	Performance (DK dropped)
i. Computer and access to Internet	83%	70%
h. Services for homework	82%	64%
a. Printed books	80%	57%
m. Website	82%	75%
q. Hours/days of operation	78%	44%
o. Place to read, work, study	77%	78%
f. Staff to help fing books or resources	77%	69%
g. Services for children, 5 or under	79%	65%
p. Meeting rooms	75%	76%
k. Staff to help with use of computer or Internet	74%	73%
n. Job search or resume help	74%	68%
j. Free Wi-Fi access	76%	80%
l. Staff-led computer or Internet training	71%	65%
e. Reference materials, newspapers, magazines	67%	61%
d. eBooks, music and e-audio books to download	56%	44%
b. Audio books and music on CD	51%	47%
c. Movies on DVD	33%	44%

■ Importance (DK dropped)　■ Performance (DK dropped)

Charlotte Mecklenburg Library

MarketWise

Importance vs. Performance of Services Provided by the Charlotte Mecklenburg Library (Q11a-q)
Users (Able to Rate)

Average Ratings on 1 to 10 scale, 1= Very poor, 10=Very Good

		Importance	Performance
h.	**Homework services**	**9.4**	**8.7**
m.	Website	9.4	9.1
i.	Computer and Internet access	9.3	9.0
a.	**Printed books**	**9.3**	**8.7**
q.	**Hours and days of operation (largest gap)**	**9.3**	**7.9**
f.	**Staff to help find books or resources**	**9.2**	**8.9**
o.	Place to read, work, study	9.2	9.2
g.	**Services for children 5 and under**	**9.2**	**8.7**
j.	Free Wi-Fi access	9.1	9.2
k.	Staff to help with computer or Internet	9.0	9.0
p.	Meeting rooms	9.0	9.1
n.	Job search or resume help	9.0	8.9
l.	Staff-led computer or Internet training	8.9	8.7
e.	Reference materials, newspapers, magazines	8.8	8.7
d.	**eBooks, music, e-audio books to download**	**8.4**	**7.9**
b.	Audio books and music on CD	8.1	8.1
c.	**Movies on DVD**	**7.2**	**7.8**

Yellow highlighting indicates significant gaps between importance and performance.

← Performance higher than importance.

Note: Importance is very high on all services with the exception of movies on DVD. Performance is very high on all services except: hours/days, eBooks/music to download, and movies on DVD.

Charlotte Mecklenburg Library

MarketWise

User Quadrant Analysis (Based on Averages)

Quadrant 1:
f. Staff to help find books, resources
g. Programs for children under 5
i. Computers/Internet access
j. Free Wi-Fi
k. Staff to help with computers/Internet
m. Website
n. Help to find job/create resume
o. Place to read, work, study

Quadrant 2:
a. Variety of books
q. Hours/days of operation

Quadrant 3:
b. Variety of audio books/music on CD
c. Variety of movies on DVD
d. Variety o eBooks, music, e-audio books to download

Quadrant 4:
e. Reference materials, newspapers, magazines.
l. Staff-led computer/Internet classes

Quadrant 4:
Low Importance/
High Performance

Quadrant 1:
High Importance/
High Performance

Quadrant 3:
Low Importance/
Low Performance

Quadrant 2:
High Importance/
Low Performance

Performance (y-axis): 7.60, 7.80, 8.00, 8.20, 8.40, 8.60, 8.69, 8.80, 9.00, 9.20, 9.40

Importance (x-axis): 7.20, 7.40, 7.60, 7.80, 8.00, 8.20, 8.40, 8.60, 8.80, 8.94, 9.00, 9.20, 9.40

Data points: J, O, M, P, K, I, F, N, E, L, G, H, A, Q, B, D, C

Charlotte Mecklenburg Library

MarketWise

Quadrant Analysis

Shows priority services (those with above average importance) and where a performance improvement should have the most impact on customer satisfaction and perceptions of performance.

Quadrant 4: Low importance/High performance

e. Reference materials, newspapers, magazines

l. Staff led computer or Internet classes

These are relatively less important than attributes in Quadrants 1 & 2. You can move some attention from these as long as you maintain adequate performance.

Note: Remember low importance means <u>relatively</u> low. The majority of users perceive almost all the services to be extremely or somewhat important.

Quadrant 1: <u>High importance</u>/High performance

f. Staff to help find books, resources

g. Programs for children under 5

i. Computers/Internet access

j. Free Wi-Fi

k. Staff to help with computers/Internet

m. Website

n. Help to find job/create resume

o. Place to read, work, study

p. Meeting rooms

h. Homework help

Keep doing these things well.

Quadrant 3: Low importance/Low performance

b. Variety of audio books/music on CD

c. Variety of movies on DVD

d. Variety of eBooks, music, e-audio books to download

These are relatively less important than attributes in Quadrants 1 & 2. Do not make improvements at the expense of other more important services, but improve if possible.

Quadrant 2: <u>High importance</u>/Low performance

a. Variety of books

q. Hours/days of operation

Work to improve these services.

Charlotte Mecklenburg Library

MarketWise

Objective

Examine Perceptions of the

Need for the Library in the Future and

What Needs to be Done to Meet Emerging Needs

Charlotte Mecklenburg Library

MarketWise

Do you believe the need for the Library will increase, decrease, or remain the same over the next 10 years? (Q34)
Community Sample (n=402)
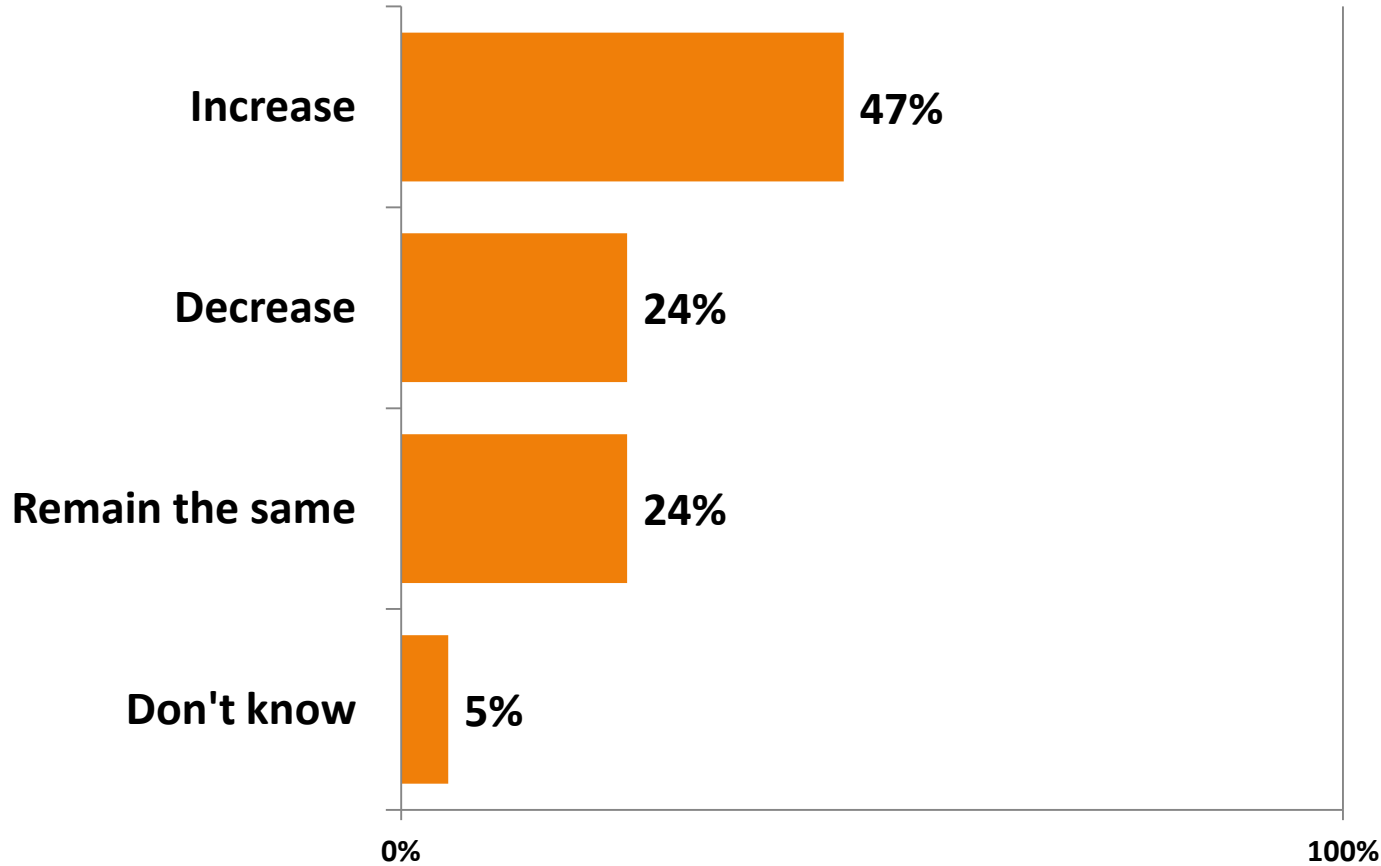
- Increase — 47%
- Decrease — 24%
- Remain the same — 24%
- Don't know — 5%

0%   100%

Charlotte Mecklenburg Library

MarketWise

Do you believe the need for the library will increase, decrease, or remain the same over the next 10 years? (Q34)
Users vs. Non-Users

Increase — Users: 52%, Non-Users: 38%
Decrease — Users: 19%, Non-Users: 29%
Remain the same — Users: 24%, Non-Users: 26%
Don't know — Users: 5%, Non-Users: 7%

0% — 100%

■ Users (n=434) ■ Non-Users (n=168)
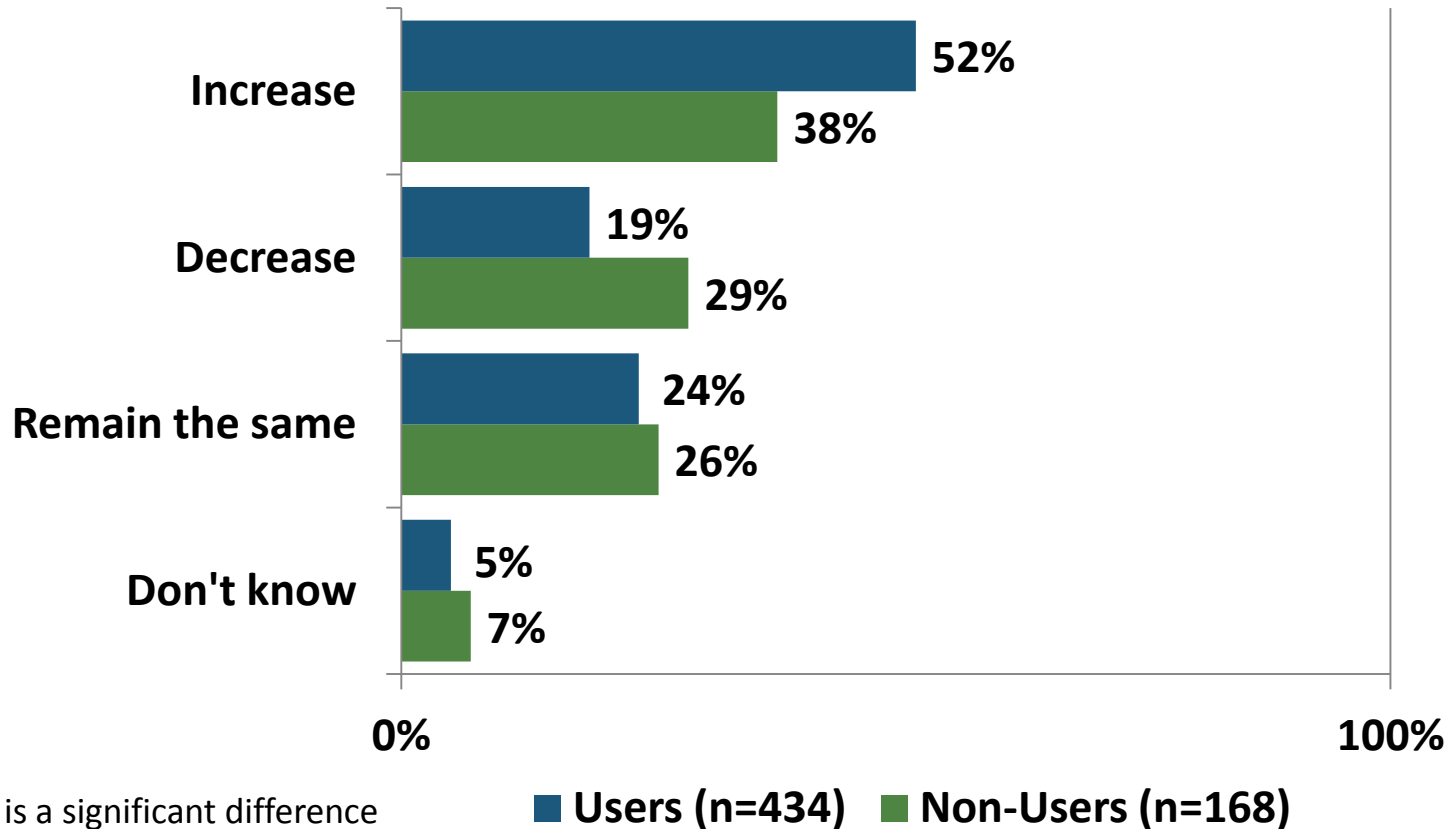
There is a significant difference in perception of need by Users and Non-Users.

Charlotte Mecklenburg Library

MarketWise

Top Reasons Why the Need for the Library <u>Will Increase</u> Over the Next 10 Years (Q35a)
Community respondents who indicated need will increase (n=189)
Open-ended (unaided) comment question

Reason	Percentage
Population growth	25%
Need for Internet, computers, and technology will grow	24%
Free resource for economically challenged	16%
Need for education and information will grow	15%
Economic cycles	12%
Needs for children will increase	11%
Don't know	7%
Safe place to read, study, work	5%
Place to get books	5%
To search for employment	3%

0%   50%
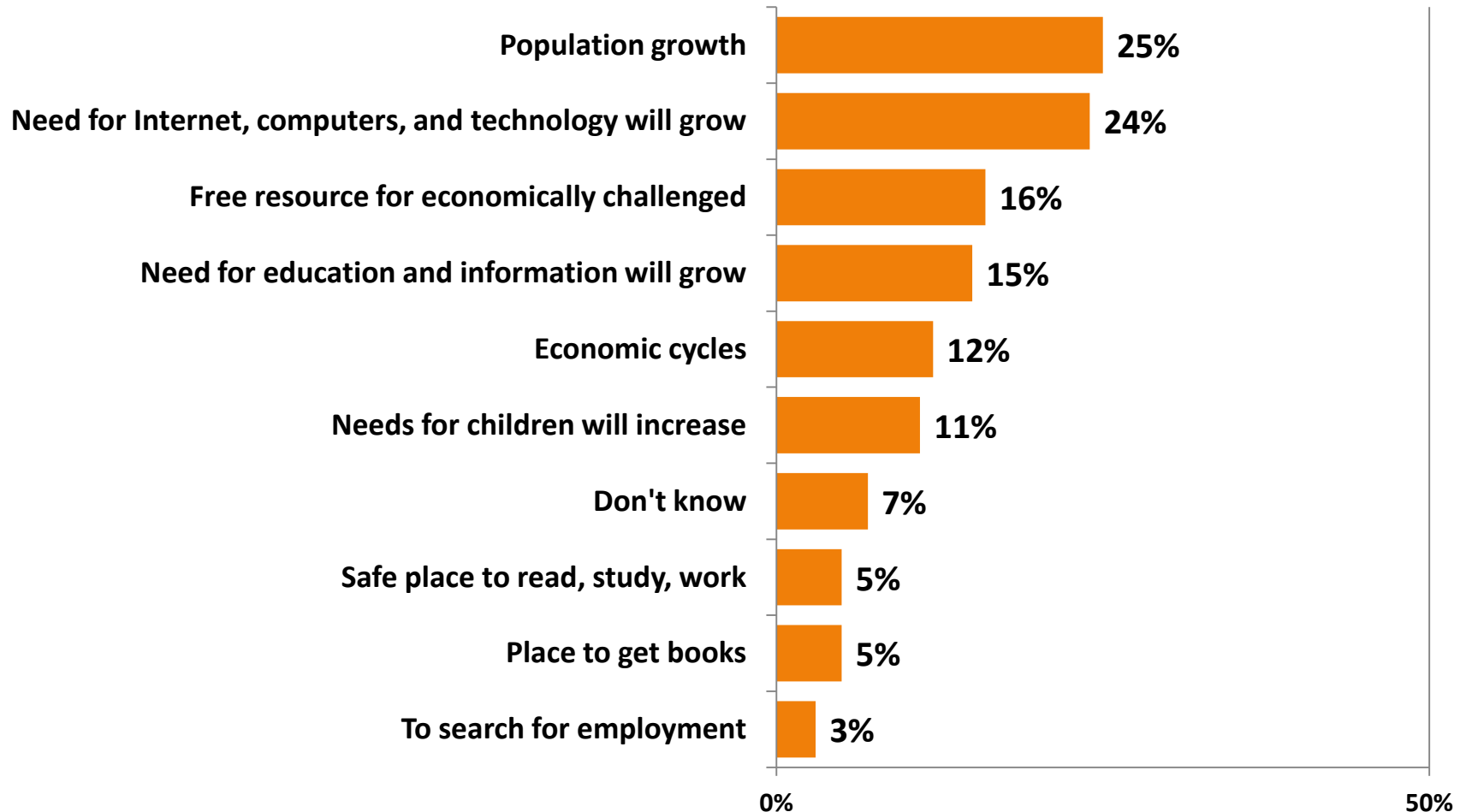
Top Reasons Why the Need for the Library Will Increase Over the Next 10 Years (Q35a)

Users vs. Non-Users who indicated need will increase

Open-ended (unaided) comment question
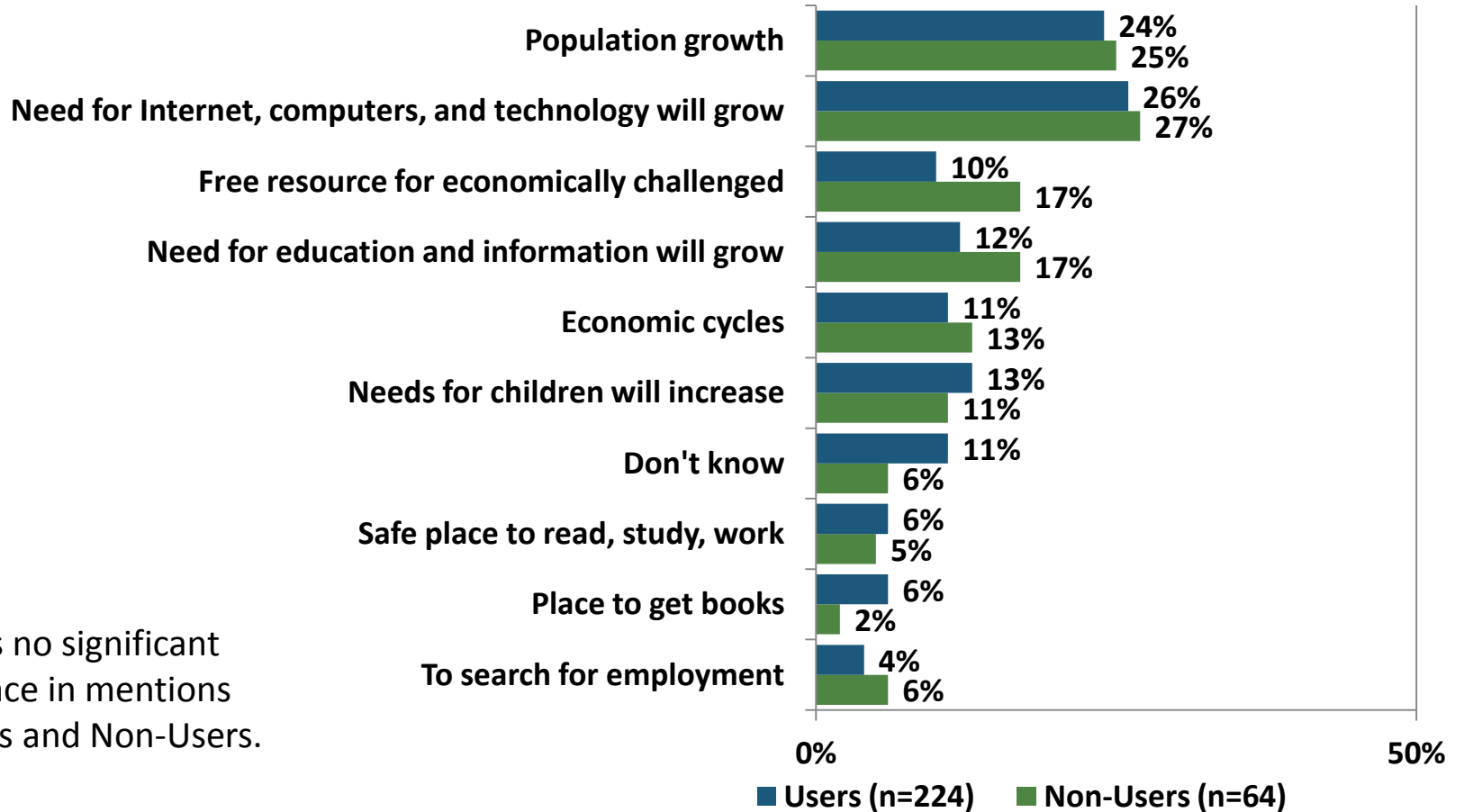
Reason	Users	Non-Users
Population growth	24%	25%
Need for Internet, computers, and technology will grow	26%	27%
Free resource for economically challenged	10%	17%
Need for education and information will grow	12%	17%
Economic cycles	11%	13%
Needs for children will increase	13%	11%
Don't know	11%	6%
Safe place to read, study, work	6%	5%
Place to get books	6%	2%
To search for employment	4%	6%

There is no significant difference in mentions by Users and Non-Users.

0%   50%

■ Users (n=224)   ■ Non-Users (n=64)

MarketWise

Top Reasons Why the Need for the Library <u>Will Decrease</u> Over the Next 10 Years (Q35)
Community respondents who indicated need will decrease (n=94)

Open-ended (Unaided) comment question

Reason	Percentage
Because of increase of Internet, computers at home	70%
Because mobile technology	10%
Printed materials becoming outdated	7%
Economic cycles	7%
People don't read as much	4%
Lack of funding	4%
Don't know	4%
Other resources available	3%
If programs & services don't match needs	2%
Lack of awareness	1%

Charlotte Mecklenburg Library

MarketWise
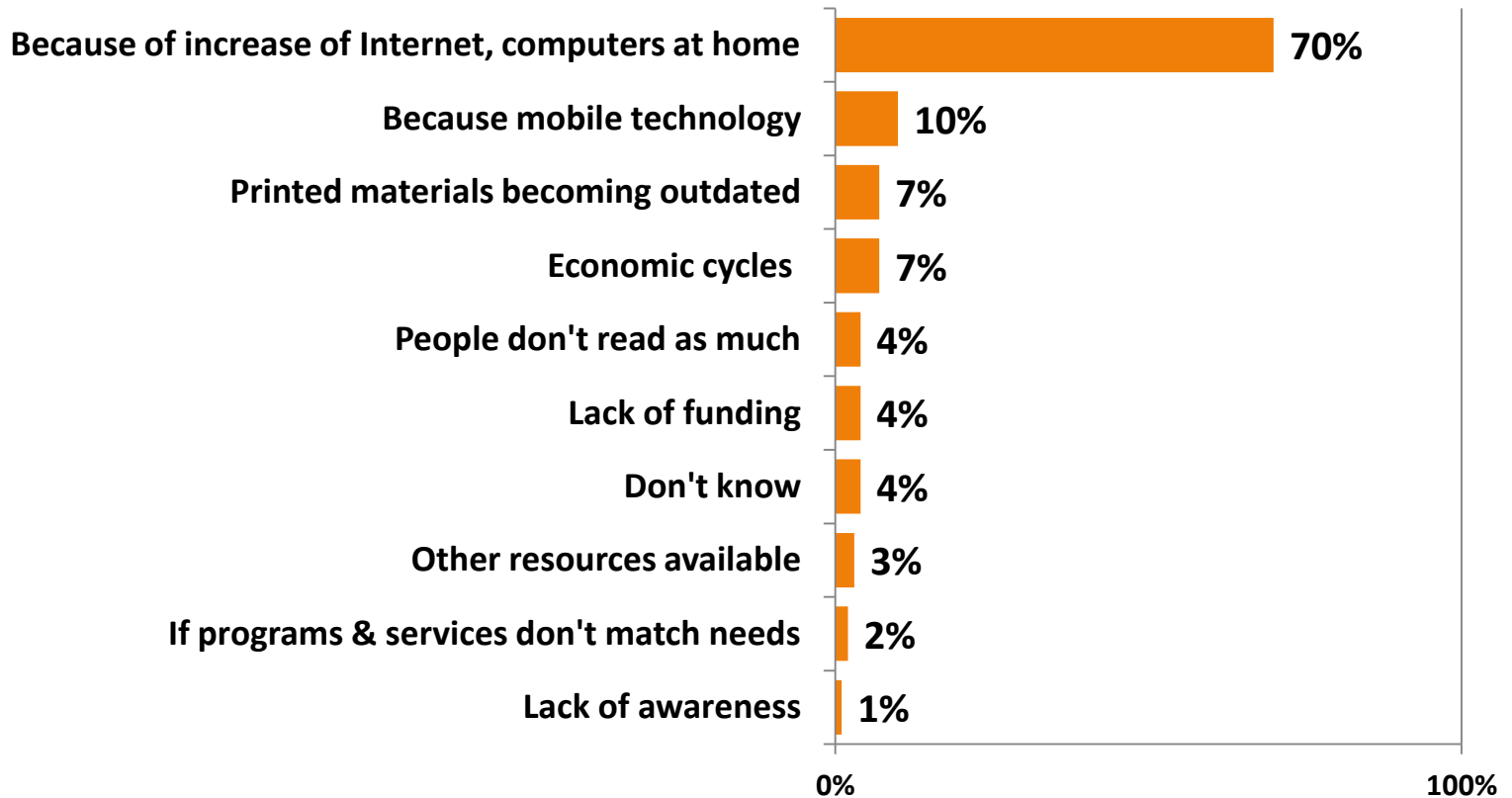
Top Reasons Why the Need for the Library <u>Will Decrease</u>
Over the Next 10 Years (Q35b)
Users vs. Non-Users who indicated need will decrease
Open-ended comment question
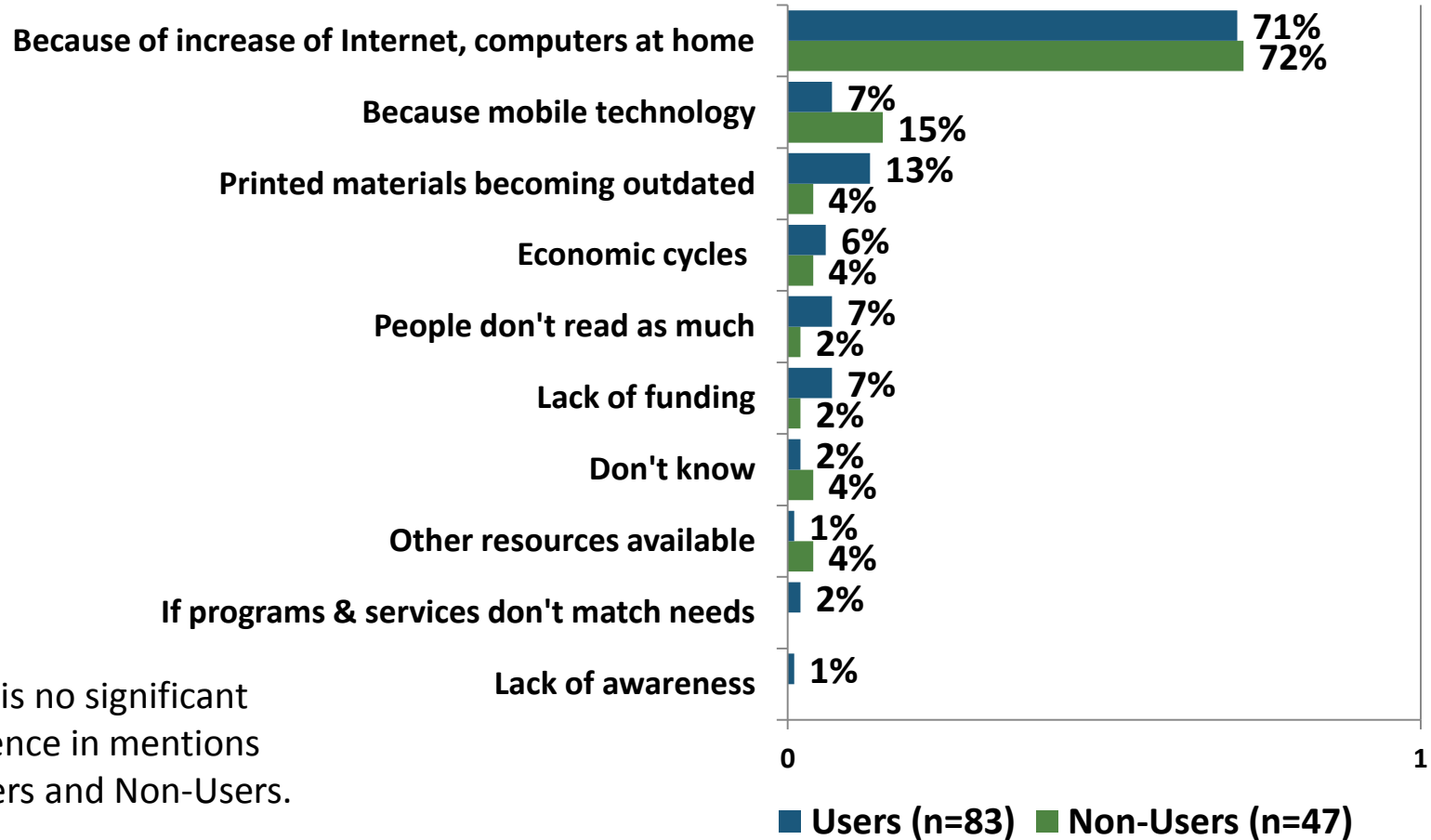
There is no significant difference in mentions by Users and Non-Users.

Category	Users	Non-Users
Because of increase of Internet, computers at home	71%	72%
Because mobile technology	7%	15%
Printed materials becoming outdated	13%	4%
Economic cycles	6%	4%
People don't read as much	7%	2%
Lack of funding	7%	2%
Don't know	2%	4%
Other resources available	1%	4%
If programs & services don't match needs	2%	
Lack of awareness	1%	

■ Users (n=83) ■ Non-Users (n=47)

MarketWise

What do you believe needs to be done to make the Library meet the emerging needs of the future? (Q36)
Community Sample (n=402)
Open-ended question

Response	Percentage
Don't know	28%
Keep up with technology, changing times	22%
Increase hours and days of operation	12%
Increase awareness of services	10%
Adequate funding	10%
Increase and update materials	7%
More computers	7%
Keep doing what they are doing	6%
Better staffing	5%
More children's programs	5%
More branches, better branches	3%
More classes, training programs	2%
Increase presence in areas of need	2%

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MarketWise

What do you believe needs to be done to make the Library meet the emerging needs of the future? (Q36)

Open-ended question

| Category	Users	Non-Users
Don't know	21%	36%
Keep up with technology, changing times	28%	20%
Increase hours and days of operation	16%	6%
Increase awareness of services	10%	10%
Adequate funding	9%	8%
Increase and update materials	9%	6%
More computers	8%	5%
Keep doing what they are doing	9%	5%
Better staffing	7%	5%
More children's programs	5%	6%
More branches, better branches	2%	3%
More classes, training programs	3%	1%
Increase presence for areas in need	2%	4%

Yellow highlighting indicates a significant difference between Users and Non-Users.

■ Users (n=434) ■ Non-Users (n=168)

Charlotte Mecklenburg Library

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MarketWise

Objective

Examine

Community, Users, and Non-Users

Use of Technology and Demographics

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MarketWise

Do you do the following . . . (Q37 –Q41)
Community Sample (n=402)

Question	Percentage
Q37. Use a computer	90%
Q38. Connect to the Internet	88%
Q39. Connect to the Internet from home	81%
Q41. Use a smartphone	69%
Q40. Have an eBook reader or other device for reading eBooks	44%

0%   100%
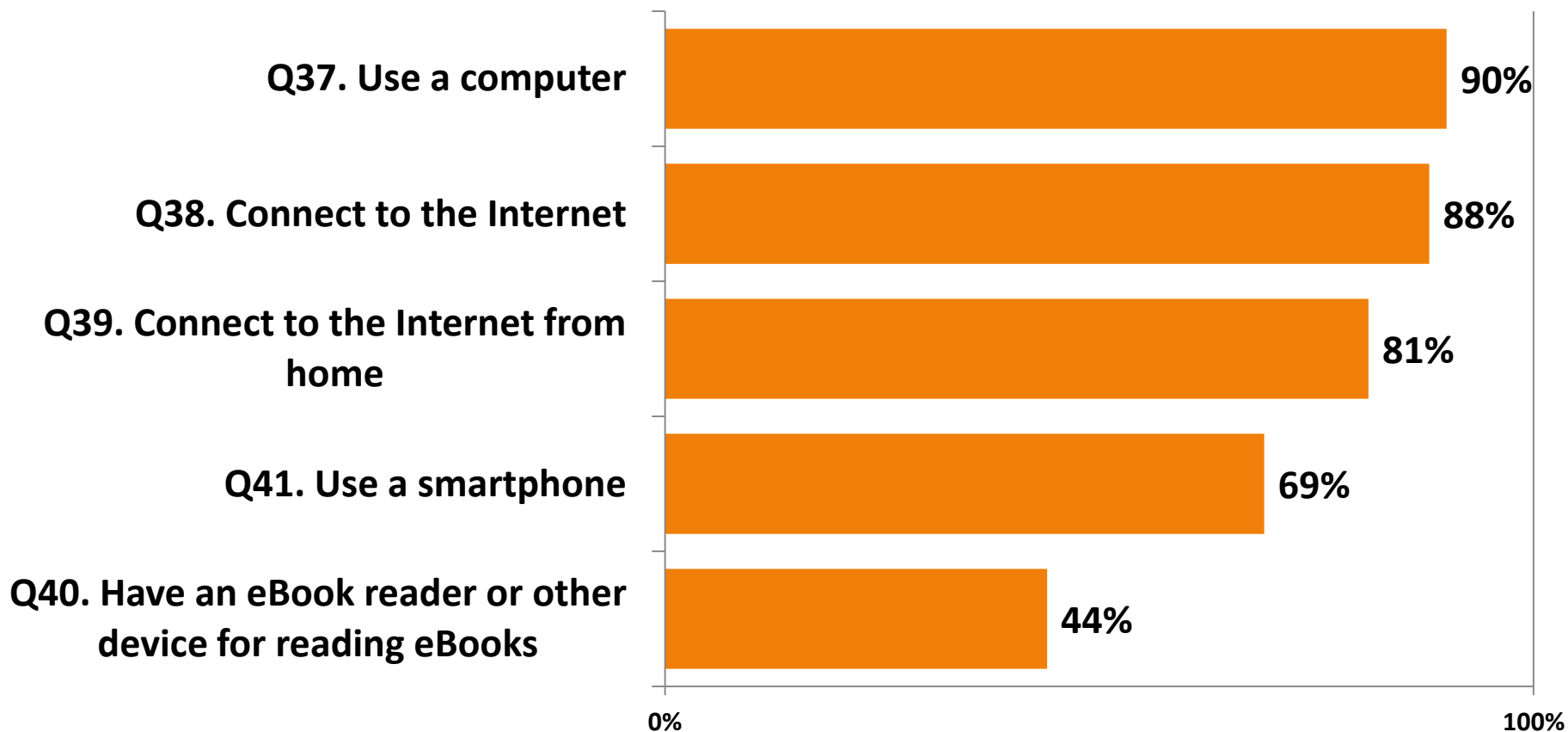
Do you do the following . . . (Q37 –Q41)
Users vs. Non-Users

- Q37. Use a computer — Users: 95%, Non-Users: 83%
- Q38. Connect to the internet — Users: 94%, Non-Users: 80%
- Q39. Connect to the internet from home — Users: 87%, Non-Users: 77%
- Q41. Use a smartphone — Users: 72%, Non-Users: 68%
- Q40. Have an eBook reader or tablet computer — Users: 48%, Non-Users: 40%

0%   100%

■ Users (n=434)   ■ Non-Users (n=168)

Charlotte Mecklenburg Library

MarketWise
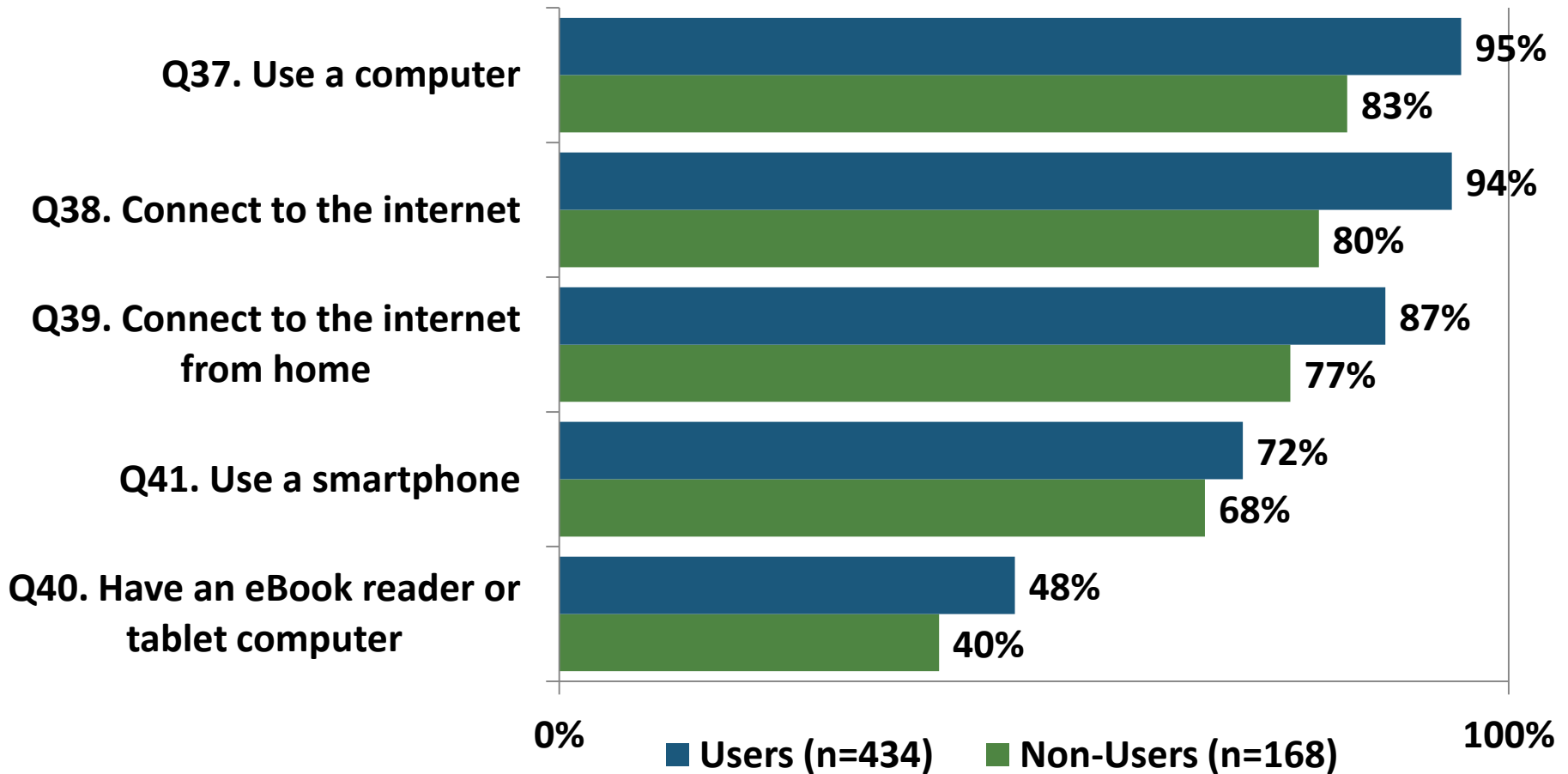
Demographics

	Community Sample (n=402)	Library Users (n=434)	Library Non-Users (n=168)
Q1. Gender			
Male	49%	44%	53%
Female	51%	56%	47%
Q3. Race/Ethnicity			
White	49%	50%	49%
Black	32%	33%	35%
Hispanic	13%	11%	10%
Other	6%	6%	6%
(Interview in Spanish)	(8%)	(6%)	(7%)
Q4. Age			
18-34	34%	29%	37%
35-44	20%	23%	17%
45-54	19%	19%	20%
55-64	14%	16%	11%
65+	13%	13%	15%
Q5. Other Language spoken at home			
Yes	30%	31%	24%
No	70%	69%	76%
Q6. Languages in home			
English only	70%	69%	76%
Spanish	22%	18%	18%
French	3%	4%	4%
Hindi	1%	1%	1%
German	1%	2%	1%
Other	3%	2%	2%

Demographics

	Community Sample	Library Users	Library Non-Users
Q42. Total in Household			
One	17%	13%	23%
Two	26%	29%	27%
Three	17%	18%	18%
Four	22%	23%	17%
Five or more	18%	17%	15%
Average	3.1	3.1	2.9
Q43. Adults in Household			
One	23%	21%	28%
Two	54%	57%	50%
Three	15%	15%	14%
Four	5%	4%	7%
Five or more	2%	2%	2%
Average	2.1	2.1	2.0
Q44. Children under 18			
Yes	50%	50%	42%
No	50%	50%	58%
Q45. Children			
Age 5 or under	19%	18%	19%
Age 6 to 12	27%	29%	19%
Age 13 to 17	20%	19%	16%

Demographics

	Community Sample	Library Users	Library Non-Users
Q46. Marital Status			
Married	53%	55%	48%
Separated/Divorced	12%	11%	12%
Widowed	8%	7%	10%
Single	27%	27%	29%
Q47. Years in Charlotte			
5 or less	16%	11%	21%
6 to 10 years	19%	22%	15%
11 to 20 years	26%	28%	24%
21 to 50 years	29%	30%	31%
51 years or more	10%	9%	9%
Q48. Education			
Less than HS	10%	6%	13%
HS graduate	25%	21%	27%
Vocational school	3%	2%	2%
Some college	21%	22%	26%
College graduate	25%	30%	21%
Post grad. studies	17%	18%	11%
Q49 .Employment			
Full time	46%	46%	49%
Part time	13%	14%	10%
Retired	16%	15%	17%
Student	5%	6%	5%
Homemaker	5%	6%	4%
Unemployed	8%	6%	7%
Disabled	7%	6%	7%
Military	1%	0%	1%

Charlotte Mecklenburg Library

MarketWise

Demographics

	Community Sample	Library Users	Library Non-Users
Q38. Income (Refusals dropped)			
Less then $15k	11%	10%	9%
$15k to <$25k	12%	8%	15%
$25k to < $35k	12%	14%	12%
$35k to < $50k	12%	12%	11%
$50k to < $75k	18%	19%	15%
$75k to < $100k	17%	17%	16%
$100k or more	18%	19%	20%

MarketWise