# Public Libraries Beyond the Crisis: Letting Go of the Past and Embracing a New Future

*OrangeBoy facilitated a national library customer tracking survey to seek input about the attitudes, awareness and satisfaction of library customers from March 15-June 15, 2020 when nearly all public libraries' facilities were closed and library services moved digital content and virtual programs to the Internet, collecting 23,610 responses from 20 public libraries in North America. OrangeBoy also analyzed aggregated usage data from March 15 – June 15, 2020 from 120 public libraries on its Savannah® platform to track changes and trends in digital use and shifts in customer behavior during this time. Sandra Swanson and Steven Potter collaborated to write about these trends.*

## Introduction

Libraries have reported exponential growth of digital services as libraries moved services to the Internet as stay-at-home orders shuttered library locations. According to a June 18, 2020 article in *Fortune*, OverDrive, a provider of e-books to libraries, saw the following trends:

 *"...e-book loans have jumped 53% on average since before mid-March. Kids, or grownups checking out kids' books, have increased their e-book reading the most, the company says. Young adult nonfiction e-book checkouts are up 122%, and juvenile fiction is up 93%."*

This trend is not surprising, as Americans were looking for entertainment, skills development and children's learning resources in the early phases of the Coronavirus pandemic. OrangeBoy, promoting customer segmentation strategies for the past 20 years, knew there was more to the story. We wanted to know how many new digital users libraries were converting, either through acquisition of new cardholders or migration from other customer clusters. We were also interested in which customer clusters were migrating, and which ones were more resistant to adopt this format.

We also were curious what library customers were thinking. How did their awareness levels of their local library change during this time period? Who was reporting changes in their use of library digital and virtual services? And, what was their satisfaction with the library with facilities closed?

But more than anything, once these trends are understood, how do libraries transform past the pandemic? Which trends will stay and which ones facilitate permanent changes in the way libraries serve their communities? How do libraries let go of what was and embrace new service models without fear?

Here is what we found.

**Trend 1: Increased digital use was already a growing trend before COVID-19—the pandemic simply accelerated it**

OrangeBoy, over its 15-year history of working with public libraries, pioneered a customer segmentation system that groups library users into one of 14 behavioral segments called clusters, based on how people use library services.

Much of a library's time and attention is devoted to serving *Page Turners*, a cluster that primarily borrows print materials for their own reading pleasure. Many libraries say they offer more than just books, yet libraries often dedicate a disproportionate share of resources to this group with significant shelf space, collection budgets, searchable web-based catalogs, ability to place and pick up holds, and inter-library loan networks. The reality is that this cluster has been shrinking while the two digital clusters, *Digitarians* and *Transitionals*, continue to grow. In fact, for many libraries, *Digitarians* often represent a larger percentage of users.

This growth can be attributed to several factors, including shifting consumer preferences, quality of available digital content, and increased library budgets in the digital space.

So, it is no surprise that overall digital use spiked when the pandemic hit and libraries closed. It simply accelerated a trend that was already prevalent within public libraries.

**Trend 2: The increase in overall digital use is a combination of existing and new digital users**

The Orangeboy National Library Customer Tracking Survey (tracking survey) and actual usage statistics from Savannah both show increased digital usage. In fact, libraries on OrangeBoy's Savannah system show a 65 percent increase in total digital activity from March to June 2020. However, digital use based on the total number of customers looks slightly different. Savannah libraries collectively show a 13 percent increase in digital use from individuals over the three-month time period, with 40,334 people accessing a digital resource that had not previously done so across 91 libraries that were included in this measure.

The increase in digital users comes from adding new cardholders as well as converting existing customers from other clusters to *Digitarians*. However, as the following trend will show, the adoption of digital use is not universal across all customer clusters.

**Trend 3: Not all digital use is created equal across customer clusters**
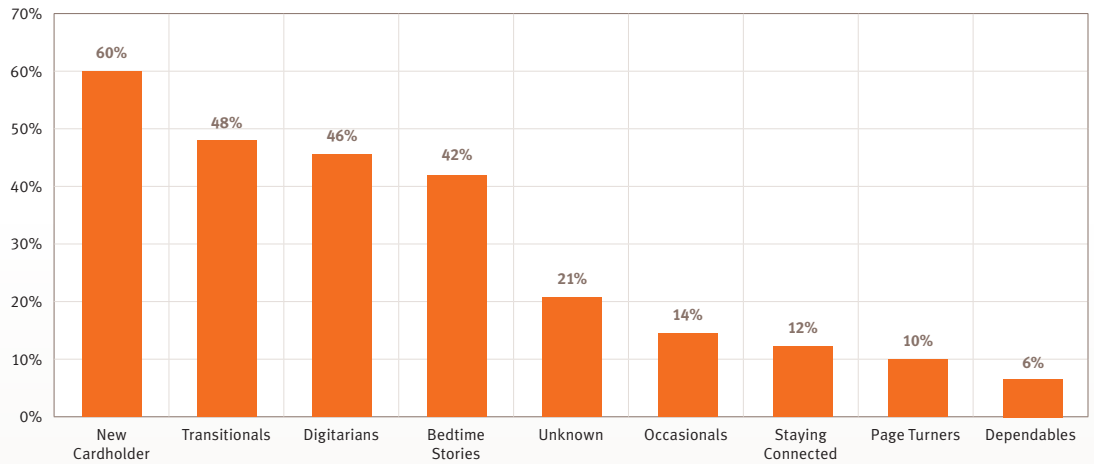


Based on results from the tracking survey, respondents reported whether they had used digital services since library facility closures in March 2020. As the chart illustrates, New Cardholders reported the highest digital use, followed by *Transitionals*, *Digitarians* and *Bedtime Stories*. The three clusters with the lowest self-reporting of digital use include *Staying Connected*, a cluster that primarily uses a library computer, *Page Turners*, heavy print borrowers, and *Dependables*, heavy print and AV users.

Those clusters less likely to use digital resources may be attributable to content, lack of familiarity with how to download, personal preference for print, or lack of hardware to access content. Libraries could survey those clusters with low digital adoption and then work to address the reasons for non-use.

**Trend 4: Older adults show the highest age cohort with increased digital use, challenging assumptions about adoption among older library users**

**Customers Using Digital Resources**

Age Range — Age 0-12 — Age 13-17 — Age 18-34 — Age 35-64 — Age 65+



Week Ending Date
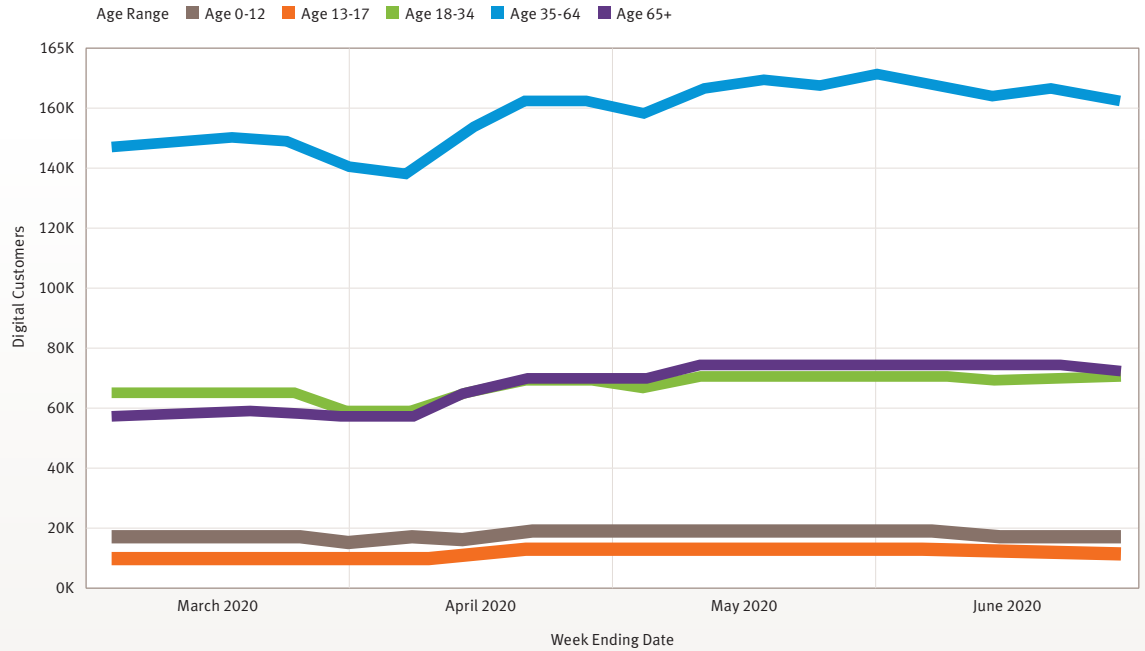
While the chart shows highest use among the 35-64 age group for digital use over this time period, two age groups showed rapid increases – teens and the 65-and-older age group. Teens exhibited a 22 percent increase, while those over the age of 65 grew their digital use 27 percent. Growth trends in these two age cohorts tell us several things. First, teens flocked to digital use during early days of the pandemic, possibly related to distance learning. The growth in the 65 and up age group provides opportunities to migrate customers from print to both print and digital, and even digital-only use. We saw from an earlier trend that *Page Turners*, with approximately 50 percent who are over the age of 65, are resistant to digital migration but it is possible to convert some with targeted communication and adequate quantity and quality of content.

**Trend 5: Consistent and Frequent Communication with Library Customers is Essential**

**Emails sent with digital-related keyword(s)\* in message name or subject – After 3/16/2020**
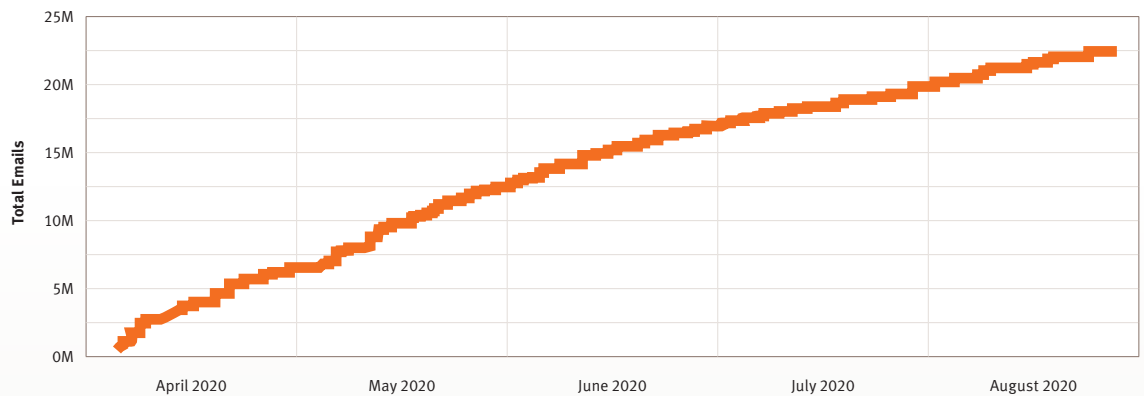


Libraries on the Savannah platform increased their messaging that promoted digital services to customers by 11 times in the first three months of the pandemic compared to the first three months of the year. If we include messages about closures and other important information, this increase is exponentially higher.

This trend not only bolstered digital use, but it kept libraries top-of-mind for their customers. Those libraries participating in the OrangeBoy National Library Customer Tracking Survey saw 27 percent of survey respondents indicate their awareness of the library increased during the shutdown. Awareness levels were even higher among new cardholders, in which 50 percent said their library awareness had increased during this time period.

**Trend 6: Customer Feedback Provides Valuable Insights and Supports Decision-Making**

In addition to the tracking survey, many libraries utilizing Savannah sent customized surveys to gain valuable insights about library services. These surveys helped shape strategic planning efforts, understand customer satisfaction and loyalty, which locations should roll out curbside services first, what youth services were most needed, feedback about future virtual programs, to name a few.

The tracking survey identified that 69 percent of library customer respondents were either *satisfied* or *highly satisfied* with their libraries during the closures, which indicates the services offered while library locations and enhanced communication efforts kept libraries in a favorable light with more than two-thirds of its constituents. Those who voiced dissatisfaction were negligible; however, 29% of respondents scored their feelings about the library as *neutral*. Libraries should work hard to move those customers from *neutral* to the *satisfied* column as opposed to letting satisfaction slip toward the *dissatisfied* category.

**Trend 7: Customer needs and interests continue to shift as the pandemic crisis continues**

The tracking survey included a question about respondents' needs during the stay-at-home order. There was an interesting trend that evolved as the survey ran from week to week. In the first few weeks, respondents reported *Socialization* as their highest need, at 38% percent, followed by *Entertainment* and *Learning Resources*. However, toward the end of June, *Socialization* dropped significantly, and *Entertainment* rose, thus reversing these two needs.
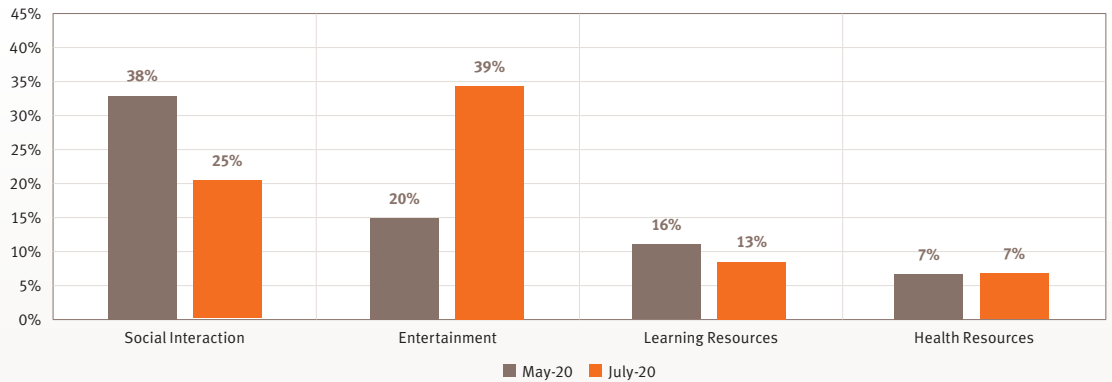


This trend bodes well for libraries, many at various stages of services offered at library locations. The shift in response indicates that people were getting their socialization needs met, (or had adjusted to the 'new normal' of social distancing), but with entertainment needs remaining high, this is a need that libraries can meet with strong digital collections and reasonable hold times.

**Trend 8: Virtual programs have potential, but require more promotion and experimentation**

Just five percent of survey respondents said they had participated in a virtual library service, though 21 percent said they would likely attend a virtual program in the future. These numbers show low adoption in the early stages of moving programs to the virtual stage but also show the willingness of library customers to attend a virtual program. Libraries should pay close attention to statistics to show which programs are worth continuing and which ones need refinement or should not be offered in the future.

**Trend 9: Library customer net losses can be attributed to decreased cardholder sign-ups**

Usage statistics among libraries on the Savannah platform show two interesting trends that determine a net gain or loss in total customers during this timeframe. The good news is among active customers, libraries retained 84 percent of its customers. However, during this same time period, libraries saw a significant decline of adding new cardholders, down 60 percent compared to cardholder sign-ups from the same time period the previous year.

This trend indicates that the methods libraries were reliant on for recruitment of new cardholders, outreach at community events, or programs at library locations, were not available and thus, the significant drop-off.

**Trend 10: Collaboration across the library community connects people with shared missions**

The library community is well connected and networked, and many libraries collaborate and share information with colleagues in their geographic area, at library conferences, and through their social networks. OrangeBoy supported this effort in several significant ways during this time period. First, we offered weekly webinars to our clients and the broader library community on various topics, and many of our clients have shared their stories through this platform. Since March 9, OrangeBoy has offered 21 webinars that were attended by 1,435 participants from 466 libraries.

In addition, OrangeBoy promoted ways to share e-mail messages and survey templates through its Savannah platform. This ensures that when one library has success with a particular e-mail or high response from a survey, it can be shared with others so they too can benefit from best practices.

## One Library Director's Perspective

**by Steven Potter**

I know none of us had a course on managing during a global pandemic in library school. Consequently, almost everything library directors experienced in the past several months was new and mostly unexpected. There has been incredible disruption and when we get back to normal, I strongly believe library service will be much different compared to library service circa January 2020. We must acknowledge that activity that was broadly visible for the first time during the pandemic is not an aberration and is what library service in a post-pandemic world will be.

Trend 1 was something we noticed at the end of 2019. The pandemic only solidified and accelerated that trend. Digital users borrow content differently than physical borrowers resulting in less output measures. The challenge for the future is to be able to articulate the value and outcomes associated with this kind of activity and from these new majority users.

Trend 4 is something that we've known for a long time. Remember the time you started a new digital service to attract more teens, only to find that it was their parents that used the service? It may have been a music service, eMagazines, or a device that plays audiobooks that started on your YA shelves only to find their way over to the Adult section. People who are born digital see nothing unique in this format. Our challenge will be to help people acclimate to digital as more content becomes available and more readily available and frankly demanded by people who many not fully appreciate how to use the medium.

Trend 7 was very important to us as we decided to close our libraries. As so many people clamored for the library to remain open to foster social interaction, the other side of that coin was that we would become a literary based super spreader. As people adjusted to the new normal, they realized that socialization would come in new ways and our role became more focused on providing more entertainment content. Sadly, Trend 7 underscored something else that we knew pre-pandemic concerning a library's role as the keeper of important information. In the middle of a health crisis, people did not seek out the library for health information.

Trend 9 and Trend 5 are somewhat related in my opinion, was true pre-pandemic and will be in the future, too. To effectively serve our public, we must connect, connect often, and connect in specific and meaningful ways. Frequent conversation and contact with our customers and telling exactly how we can help that person conquer today's obstacle will help you retain that user.

Trend 8 correlates with something else that we knew pre-pandemic. Programming has some of the most costly overhead expenses of any library activity and interest often is not the same as participation. How many times have you hosted a program for 20 people when 75 people signed up? The follow through with virtual programming is similar. I think this trend suggests investigating program delivery post-pandemic programming that decouples place and time from the event. Failure to do so will make virtual programming no more successful than traditional programming.

Library service was in the midst of a silent change pre-pandemic. We cannot make the mistake of reading the acceleration of change as a transformation brought solely by the pandemic. We need to embrace the transition and build on the change the pandemic reinforced for us.

## Looking to the Future

As the pandemic continues to change our world in ways large and small, library professionals must evaluate how these trends play out for their libraries and communities.

A major trend that cannot be ignored is the shift to digital. As we identified earlier, this shift was already happening for many libraries – digital is here to stay. Libraries must orient their strategies to accommodate this shifting trend.

There is a place for print within the library service portfolio, but decisions made about collections, staffing, and library facility layouts must be considered to accentuate the print collection for the right audiences, thus freeing up time, talent and treasure to serve other needs.

When the time is right to welcome customers safely back into libraries, spaces need to align to fulfill socialization and learning needs that cannot be met at home, school or work.

This white paper identified a significant decline in welcoming new customers to libraries, a vital component of the customer life cycle. An evaluation of the whole community, establishing priorities, and determining how to position the library for the myriad of needs will be essential for long-term viability.

As we look to the future, libraries also need to build on existing work to adapt policy, staffing, programs, and collections to support diversity, inclusion and social justice. This should not be done in isolation but with representatives from different segments of the population to engage community members in meaningful ways.

It is tempting to tread water through our current environment, hoping the behaviors of library customers will fall back to mirror pre-pandemic days, but this mindset will only lead to disappointment. Subtle shifts in operations, services, policy and staffing are simply not going to sustain libraries into the future. As difficult as these shifts are, they are necessary to position public libraries as essential.

# About the Authors

**Sandra Swanson**

Sandra is President of OrangeBoy, Inc. and has 30 years' experience in marketing, data analysis, product development, customer segmentation, and strategic planning. Prior to joining OrangeBoy full-time in 2001 as co-owner, she started her career in fundraising and marketing in the non-profit sector, followed by product management roles at LEXIS-NEXIS and Sterling Commerce (now IBM).

At OrangeBoy, Sandra helped pioneer the company's proprietary customer segmentation system for libraries and the development of Savannah, the company's cloud-based customer analytics and engagement tool. She has managed numerous consulting projects with libraries, social service agencies, retailers and cultural institutions.

Sandra holds an MBA from Capital University (Ohio) and a B.A. in Communication from The Ohio State University.

**Steven V. Potter**

Steven is the CEO and Library Director of Mid -Continent Public Library. He has been with the Library system since 1988, where he started as a typist after finishing his undergraduate work in history at the University of Missouri-Kansas City. He was responsible for the system's first website and the project to bring public Internet computers to the Library, as well as developing the largest public genealogy library in the U.S. (The Midwest Genealogy Center).

Steven is now overseeing the MCPL's shift to providing library access in a digital age. The innovative Woodneath Library Center gathers many of these innovative efforts in one place. For these reasons and many more, MCPL was recognized as a recipient of the 2014 National Medal from the Institute for Museum and Library Service.

He co-authored *The Purposed Based Library* and was named Public Administrator of the Year by the Greater Kansas City Chapter of the American Society for Public Administration in 2015.

He holds an MLS from the University of Missouri-Columbia and an MPA from the University of Missouri-Kansas City .

## About OrangeBoy, Inc.

OrangeBoy has been helping clients Think in Color for more than 20 years, using customer insights to drive results.

Inspired by a little orange cat named Opie, OrangeBoy set out to tackle challenging business problems by studying consumer behavior and community characteristics. Opie's colorful personality, work ethic and ability see things differently served as the basis for the company name and represents our values still today.

OrangeBoy has leveraged its 15-year industry expertise to build and host Savannah®, a software as a service (SaaS) customer intelligence platform designed to help libraries improve community outcomes by harnessing the power of data.

**www.orangeboyinc.com**