





# From Awareness to Funding

*A study of library support in America*

**A Report to the OCLC Membership**





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## Introduction: Funding the mission

Each of the 9,000 public library systems in the United States<sup>1</sup> has a unique mission, a mission crafted to meet the unique needs of the community it supports. But together these libraries also share a collective mission: *to provide every resident of the United States the opportunity to thrive through access to information and lifelong learning.* The importance of this collective mission has been strengthened by decades and generations of experiences that confirm that free and open access to information transforms; it transforms lives, it transforms communities and it transforms societies.

***“The library is a great promoter of equality and democracy. Anyone can go, anyone can read what they want and make whatever use they want of it for whatever they want to pursue.”***

*(Research participant, Minneapolis, Minnesota)*

Free access transforms, but transformation is not free.

While the majority of residents of the United States have visited their public library and have used its services, most cannot describe how their library is funded. Over 80% of funding for U.S. public library operations comes from local tax receipts. State and federal taxes provide a relatively small portion of public library operating funds in most states. Together, state and federal funds accounted for approximately 10% of total annual operating budgets of U.S. public libraries in 2005<sup>2</sup>, down from 14% of operating budgets in 2000. Dependence on the local purse for public library funding is high, and increasing.

Local taxpayers provided over \$9 billion in 2004 to support the operations of their public libraries. U.S. taxpayers also provided \$800 billion in local taxes for other community services including fire, police, schools, health and parks.<sup>3</sup> All of these vital community services demand time, attention and tax support from citizens and their elected officials. There is growing pressure and increasing competition for the community mindshare.

For many public libraries, the need to grow awareness and mindshare is intensifying as library annual operating funds are not keeping pace with the services and resources needed to meet their mission. Analysis of 2005 data collected by the National Center for Education Statistics highlights that over a third of U.S. public libraries are operating with budgets that are declining. Many more are operating with budgets that are level or slightly ahead of inflation, but significantly behind the current inflation rates for employee benefits, energy and materials. As a result, many libraries are being forced to reduce staff, cut hours and reduce community services.

***Public libraries  
funding represents  
roughly 1% of total local  
community operating  
expenditures.***

Source: U.S. Census Bureau, 2004

## Introduction: Funding the mission

The longer term public library funding picture is also challenging. Library levies, referenda and bond measures have been failing at an increasing rate over the past decade. And the number of library levies placed on a ballot for voter consideration is also in decline.<sup>4</sup>

If residents are not aware of how their libraries are funded, are they aware of the growing financial pressures on libraries? Are the service reductions or trade-offs that occur as library budgets decline debated sufficiently within local communities? And is the collective library voice strong enough to attract the mindshare necessary to ensure future funding? These critical questions now face many U.S. public libraries.

We live in a country, and a world, blanketed by marketing messages and appeals for consumers' and voters' time, money, endorsements and mindshare. It is estimated that total advertising spend in the United States will reach nearly \$300 billion this year.<sup>5</sup> The marketing techniques deployed by organizations to reach their sales or advocacy goals are becoming increasingly sophisticated and effective. Indeed, the number and effectiveness of library marketing and advocacy campaigns are also growing. These campaigns have been successful at increasing awareness and library use. Library visits are up 19% from 2000 to 2005. Circulation of library materials is up 20%. Access to public computers is up 86%.<sup>6</sup> But funding is not keeping pace with this demand. While successful in raising demand, the majority of library campaigns have been aimed at promoting library services and driving library use, not increasing library funding.

Funding the collective library mission is a growing problem and without proactive and large-scale action, we can see no economic, social or political factors or events that will reverse the trends in library funding. So, in 2007, funded by a generous grant from the Bill & Melinda Gates Foundation, we set out to ask the question: is it possible to apply the latest marketing and advocacy techniques that are being so successfully used in other venues to create funding awareness, drive action and *ultimately increase funding for public libraries?* Is it possible to reverse the downward trend in library levy passage rates? Can libraries be more effectively positioned alongside other critical local services like fire, police, schools and public health? And could a national library support campaign make a difference in the ability of public libraries to fund their collective mission?

Our hypothesis:

U.S. public libraries are facing marketing and advocacy challenges that have been faced by other 'super brands.' Lessons learned and successes achieved can be applied to increase library funding. Utilizing marketing and advocacy techniques targeted to the right community segments with the right messages and community programs, we can improve the state of public library funding.

OCLC partnered with Leo Burnett, a national research and advertising agency, to conduct the research and exercise this hypothesis, utilizing the most current marketing techniques and practices. We also worked with a distinguished group of librarians and community leaders who guided and advised us throughout the project.

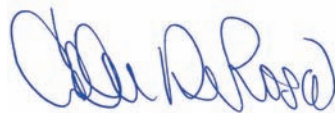
*We set out to ask the question: is it possible to apply the latest marketing and advocacy techniques that are being so successfully used in other venues to create funding awareness, drive action and ultimately increase funding for public libraries?*

*There is sufficient, but latent, support for increased library funding among the voting population.*

I am pleased to report the results are promising. Findings suggest that there is sufficient, but latent, support for increased library funding among the voting population. There is evidence that a large-scale library support campaign could make a difference. Working together with librarians, local communities, library consortia and association leaders and other partners, we believe that it is indeed possible for a library support campaign to increase, and sustain, public library funding in the United States.

This report summarizes our findings. We look forward to your comments, your feedback and the opportunity to work together to put this research into action. You can post ideas, observations and suggestions at [www.community.oclc.org/funding](http://www.community.oclc.org/funding). You can contact me directly at [derosac@oclc.org](mailto:derosac@oclc.org).

Again, our thanks to the Bill & Melinda Gates Foundation for its support of this research and for the opportunity to partner on library advocacy initiatives.

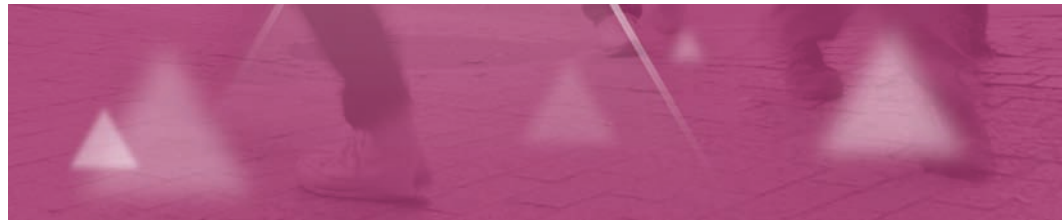


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## Methodology

OCLC received a grant from the Bill & Melinda Gates Foundation to conduct research, develop strategies, create materials and evaluate the potential of marketing and communications programs to sustain and increase funding for U.S. public libraries.

OCLC engaged Leo Burnett to field an advocacy research program that included both quantitative and qualitative research.

## Quantitative research

The quantitative study targeted two audiences: residents in U.S. communities of populations less than 200,000 and elected officials in the United States. More than 90% of all U.S. public libraries serve communities with populations of 200,000 or less. The study was intentionally designed to capture and analyze the attitudes, behaviors and opinions of residents in these communities.

The objectives of the quantitative research survey were twofold:

- To create a market segmentation analysis of the U.S. voting population that identifies which segments of voters are the most likely to generate increased support for U.S. public libraries. The segmentation study was designed to help uncover the underlying motivations and attitudes toward libraries that are indicative and predictive of their level of support for library funding.
- To understand the attitudes and behaviors of elected and appointed officials about libraries in general, the library's importance to the community and how those attitudes impact the officials' willingness to support local library funding.

### Voter survey

The survey measured over a dozen parameters, including demographics, library usage, perceptions of the local public library and librarian, attitudes toward taxation, voting behavior, community involvement, perceptions of local tax-supported services and willingness to vote for increased library funding.

The questionnaire was administered in two phases to an online panel of respondents and supplemented with phone interviews to account for people without Internet access. All interviews were conducted in cities, towns or suburbs with populations of less than 200,000 with residents ages 18–69. The survey did not include residents younger than 18 because they are not eligible to vote. The survey did not include

## Methodology

residents older than 69 because they are typically difficult to recruit for participation in market research; to capture a sample that would have been representative of people in the age group over 69, alternative research methodologies would have been required.

A 25-minute, online survey of more than 8,000 adults was fielded in January 2007. Twenty-seven percent (26.6%) of respondents self-identified as ‘Chronic Non Voters’ (i.e., they weren’t registered to vote or they were registered but never voted) and were excluded from the sample. A second 60-minute online questionnaire was fielded to the remaining respondents in February 2007 and 1,901 adults completed the second survey. Results were weighted to be nationally representative of adults ages 18–69 in populations of less than 200,000. Together, both phases provided 85 minutes of data across a sample of 1,901 adults. The survey data for the total sample have a statistical margin of error of  $\pm 2.4$  percentage points at the 95% confidence level for the U.S. population ages 18–69 in communities of less than 200,000 people. Subsamples will have a larger margin of error.

### **BrandProspect™ segmentation**

The trademarked segmentation methodology employed by OCLC’s research partner, Leo Burnett, has been used successfully to help the world’s leading brands be more effective. This is what Leo Burnett says about this trademarked approach:

“Not everyone is alike and different people want different things from the category. They also evaluate, perceive and use brands differently. No brand has ‘universal appeal’ and the more brands there are in a category, the more this is true.

For every brand, there is greater chance to build business among some segments of consumers than others. If these segments can be identified, the brand has a ‘roadmap for growth’ and can customize marketing efforts to the most likely prospects. By identifying and prioritizing groups of consumers, valuable segments become brand targets and other segments can be ignored, deferred or given lower priority. This in turn maximizes the impact of limited marketing dollars.

There are lots of ways to segment: behavior, attitudes, need states, perceptions, benefits, demography, lifestyle, life attitudes, etc. Most segmentation studies are based on a single approach imposed at the outset and the interaction of other category and brand dynamics often goes unnoticed. Brands lose sight of constructs that really matter and the findings from the study are frequently not linked to brand growth.

Leo Burnett developed BrandProspect™ to overcome this. It’s different from other segmentation studies because it’s grounded in the reality of brand growth dynamics, built around hypotheses—not around an approach—based on a multimeasure segmentation, constructed hierarchically and held to a behavioral standard.”

## Segmentation results

The BrandProspect™ segmentation analysis resulted in the development of a Library Supporter Segmentation Pyramid representing U.S. residents ages 18–69 in communities of 200,000 residents or less. The Library Supporter Segmentation Pyramid is made up of four tiers: Super Supporters, Probable Supporters, Barriers to Support and Chronic Non Voters. The Barriers to Support and Probable Supporters tiers are further segmented: Financially Strapped, Detached, The Web Wins, Just for Fun, Kid Driven, Library as Office, Look to Librarians and Greater Good. The chart below provides a summary of key data relating to the tiers and segments that comprise the Library Supporter Segmentation Pyramid.

## Segmentation data summary

Tier/Segment	Percentage of total population	Percentage of voting respondents (excluding Chronic Non Voters)	Percentage of the segment that would definitely vote yes*	Percentage of all definite yes voters*	Number of annual library visits	Percentage of all reported annual library visits	Library Support Index**	Library Use Index***
Super Supporters	7.1%	9.7%	80%	21.0%	15.9	9.4%	295	132
Probable Supporters	32.3%	44.0%	47%	55.6%	19.9	59.6%	172	186
Just for Fun	7.1%	9.7%	37%	9.7%	36.3	23.9%	136	336
Kid Driven	6.6%	9.0%	48%	11.5%	19.0	11.6%	176	177
Library as Office	3.4%	4.6%	49%	6.0%	18.0	5.7%	176	167
Look to Librarians	6.5%	8.9%	50%	12.2%	24.5	14.8%	187	227
Greater Good	8.7%	11.8%	50%	16.2%	4.5	3.6%	188	42
Barriers to Support	34.0%	46.3%	19%	23.4%	6.4	20.1%	69	76
Financially Strapped	10.6%	14.4%	11%	4.4%	10.6	10.4%	42	98
Detached	16.0%	21.8%	21%	12.4%	3.7	5.5%	77	34
The Web Wins	7.4%	10.1%	24%	6.6%	6.2	4.2%	90	57
Chronic Non Voters	26.6%	0%	0%	0%	7.4	10.9%	0	41
TOTAL	100%	100%	N/A	100%	N/A	100%		

\*In response to survey question: “If there was a referendum, ballot initiative or bond measure for your local public library on the ballot, how do you think you would vote?”

\*\*The Library Support Index is a measure of a segment’s relative willingness to definitely support a library referendum, ballot initiative or bond measure.

$$\text{Library Support Index} = \frac{\% \text{ Definite Library Supporters}}{\% \text{ population ages 18-69 in communities } < 200,000} \times 100$$

\*\*\*The Library Use Index is a measure of a segment’s relative frequency of library visitation.

$$\text{Library Use Index} = \frac{\% \text{ Library Visits}}{\% \text{ population ages 18-69 in communities } < 200,000} \times 100$$

## Elected officials survey

Elected officials who self-identified as having some level of responsibility for local library funding were surveyed using a 30-minute online questionnaire that was a shorter version of the voter survey. Survey participation was solicited via an e-mail sent to subscribers of *Governing* magazine, a monthly magazine whose primary audience is state and local government officials. Elected officials who self-identified as part of the voter study were also invited to complete the elected official questionnaire. Eighty-four elected officials completed the online survey. Due to the process by which respondents were recruited, they represent a convenience sample that is quantitative but not statistically representative of all local elected officials in the United States.

## Qualitative research

Two rounds of qualitative research were conducted to understand the attitudes and perceptions of the voters identified during the quantitative research as the most likely supporters—Probable Supporters and Super Supporters. The qualitative research was also used to test messaging for a potential library support campaign.

### Qualitative round one

The objective of the first round of qualitative research was to gain an in-depth understanding of the factors influencing the willingness of Probable Supporters and Super Supporters to vote for an increase in taxes for public library funding. Research aimed to develop a deeper understanding of the barriers and motivations to supporting library funding, including prioritization of library funding versus other publicly funded services. The initial qualitative research also aimed to inform potential brand strategies and messaging platforms for a potential library support campaign. The screening criteria were developed based on an algorithm that was created from the market segmentation analysis. The algorithm provided a pared-down set of questions that was used to identify and recruit voters who fell into the desired market segments.

Ten focus groups were conducted in April 2007 with two groups in each of five markets: Huntsville, Alabama; McPherson, Kansas; Medford, Oregon; Minneapolis, Minnesota; and Pittsburgh, Pennsylvania. The five U.S. cities were chosen to represent a continuum of size, geography and situational context of library funding (e.g., communities where a levy had recently passed or failed or where there was no recent levy activity). Unlike the quantitative survey research that was conducted in towns and cities with populations of less than 200,000, the qualitative research was broadened to include two larger urban markets (Minneapolis and Pittsburgh) to evaluate whether perceptions and attitudes differed significantly across community population size.



Participants were taken through a series of exercises in order to provide insights into:

- **Early memories:** Past associations were explored through a ‘first memory of the library’ exercise
- **Current perceptions of the library:** Current associations were explored through the development of individual collages
- **Life without the library:** To explore the role and importance of libraries in their communities today, participants were asked to imagine a scenario where the library had closed permanently and to recount what they perceived the impact would be on their community
- **Rallying support:** Participants were asked to develop individual arguments and respond to written concepts that represent compelling reasons for supporting funding for the local library.

### Qualitative round two

The second round of qualitative research tested potential marketing and advocacy campaign concepts with Probable Supporters, Super Supporters and elected officials. The concepts were developed based on the insights provided by the quantitative survey and the first round of qualitative focus groups.

Six focus groups were conducted in June 2007 in three of the five cities chosen for the first round of qualitative research: McPherson, Kansas; Huntsville, Alabama; and Minneapolis, Minnesota. Phone interviews with elected officials were conducted in June and July 2007.

Participants were exposed to five potential campaign concepts and asked questions regarding their interpretations and reactions without any previous discussion about their perceptions or usage of the library. Concepts were rotated to avoid order bias. The goal was not to reach group consensus about the ‘best’ creative direction, but instead to evaluate each concept against a set of creative evaluation criteria.

For each campaign concept, participants were asked what they perceived the concept was asking them to do (i.e., use the library, support the library, etc.). After all concepts had been presented, participants were asked a number of ‘compare and contrast’ questions to gauge the effectiveness of each concept:

- Which concept makes you see the library differently?
- Which concept makes the library seem more important to your community?
- Which concept would you talk about with your friends, family and neighbors?
- Which concept would incite you to take some sort of action to support the library?
- Which concept would motivate you to vote yes on a library levy?

The ability of a concept to generate conversation was both observed and asked directly.

## Report structure

The report presents the findings from the advocacy research:

- **Chapter 1: From awareness to funding**  
A brief overview of the research findings: an executive summary
- **Chapter 2: Who are the library’s financial supporters?**  
A detailed overview of the market segmentation analysis
- **Chapter 3: Elected officials and library funding**  
A review of survey findings about elected local officials
- **Chapter 4: Library funding support is an attitude, not a demographic**  
Eight key insights from the quantitative survey that outline the factors most likely to influence a voter’s willingness to support increased funding for libraries
- **Chapter 5: Motivating Probable and Super Supporters—testing the facts in the field**  
A review of the findings from qualitative focus groups that provide a deeper understanding of attitudes and perceptions of potential library supporters
- **Chapter 6: Mobilizing Probable and Super Supporters—what makes the difference**  
A review of the findings from qualitative focus groups that indicate what messages and approach would potentially increase voters’ willingness to support the library
- **Chapter 7: Conclusion**  
Conclusions of the advocacy research and an overview of next steps toward a possible national library support campaign.