



From Awareness to Funding

A study of library support in America

A Report to the OCLC Membership



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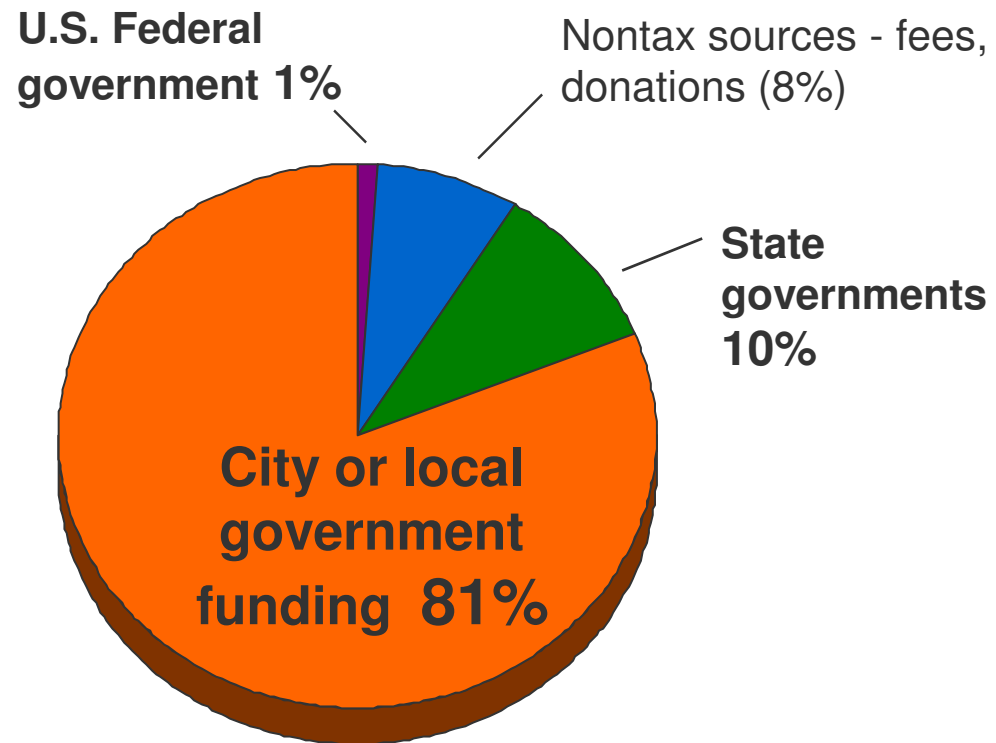
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U.S. Public Library funding



- § 25,000 public libraries
- § 75% are small, serving populations under 10,000
- § The U.S. federal government provides less than 1% of public library funding

- § Every state is unique
- § Funding is local



LibraryLove

- § Library usage is at an all time high & growing
- § Over 70% of American have a library card
- § Positive opinion >80% for both public & elected officials

Yet, the U.S. has a serious funding crisis for public libraries

- § <1% of local funding goes to support libraries; funding is stagnant
- § Most libraries have shrinking budgets
- § A record number of libraries are closing

Yet, the U.S. has a serious funding crisis for public libraries

73%

City and other local elected officials
believe the library has enough
day-to-day operating funds

Love and **Money**

Marketing the mission, not the library

A hypothesis:

U.S. public libraries are facing marketing and advocacy challenges that have been faced by other ‘super brands’.

Lessons and successes can be applied to increase and sustain library funding.

The Bill & Melinda Gates Foundation
provided a grant to investigate

Is it possible?

.....for a large scale U.S. advocacy campaign to
create an environment **to sustain and increase
funding for U.S. public libraries.**

Love & Money

Research created a marketing segmentation framework of U.S. residents and local elected official that identifies:

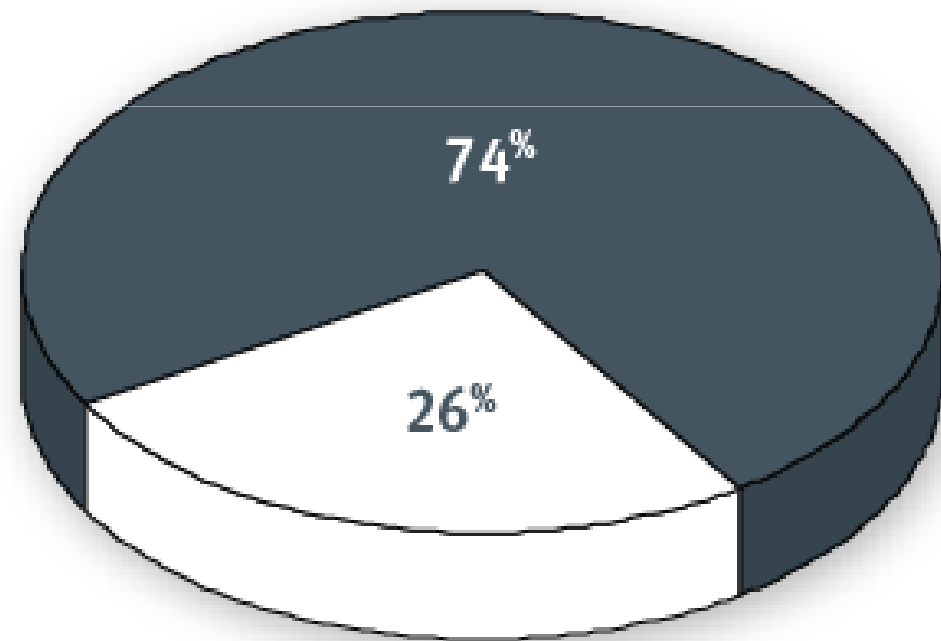
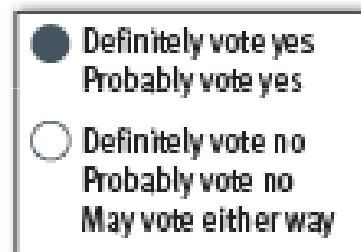
- § Which residents are most likely to turn love into financial support their local libraries
- § What motivations drive support
- § How we can change perceptions & funding

The 8 things we learned from the research in 2008

1. There's a lot that people don't know about their public libraries

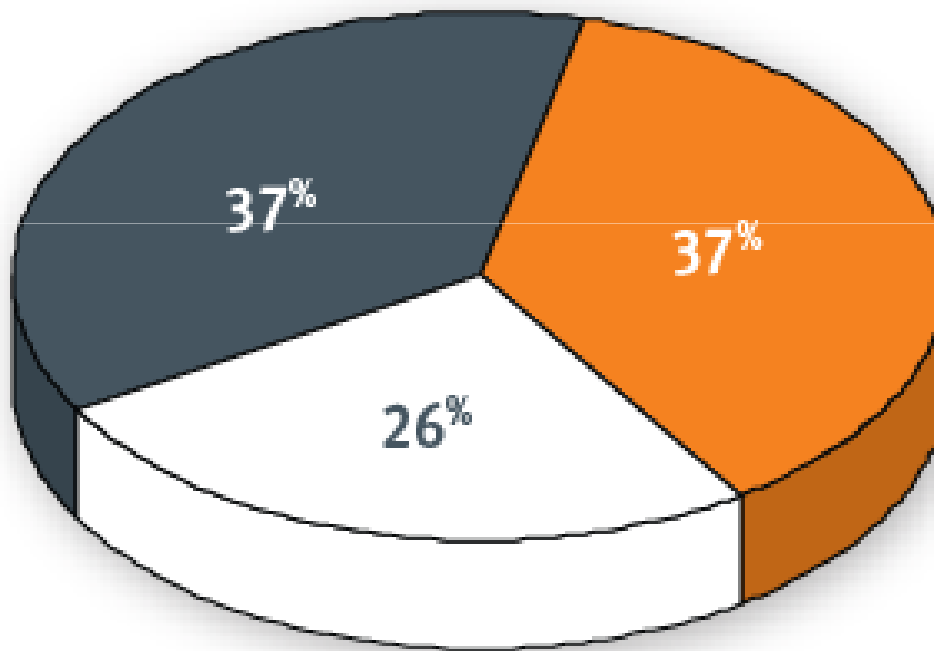
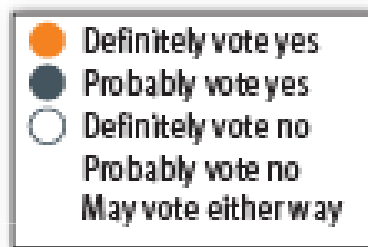
It doesn't matter

2. Most people claim they'll increase financial support for their library – but few are firmly committed to it



Total Voting Respondents

But just 37% will *definitely* support increased funding



Total Voting Respondents

3. Library support is only marginally related to visitation

4. Perceptions of the librarian are highly related to support

The Passionate Librarian

Advocate for lifelong learning

Passionate about making the library relevant

Knowledgeable about every aspect of the library

Well-educated

Knowledgeable about my community

5. The library occupies a very clear position in the minds of citizens. It is viewed as 'purposeful information'

Activities and associations



- § Reading a novel or best-seller
- § Listening to music
- § Traveling to a foreign country
- § Starbucks
- § Taking a class for fun
- § Getting a college degree
- § Playing video/computer games
- § Myspace.com
- § Youtube.com
- § **Library**
- § The History Channel
- § Reading the local newspaper
- § Watching a documentary
- § Bookstore
- § Online bookstores like Amazon
- § Wikipedia.com
- Local café
- Doing Sudoku or crossword
- Attending theater/ballet/symphony
- Visiting a museum or art gallery
- Attending church or religious service
- Conducting a job search
- People magazine
- Reading blogs
- Reading a biography or nonfiction book
- National Geographic
- The Discovery Channel
- Time Magazine
- Watching the local TV news
- Search engines like Google or Yahoo
- Taking a computer/technology course
- Encyclopedia Britannica

Activities and associations



- § An oasis from hectic lifestyles
- § Doesn't just tell you about something, but makes you feel it emotionally
- § Makes you feel like part of a social group
- § The kind of thing you can really immerse yourself in and savor
- § Like an old friend
- § Creates fond memories
- § Challenges you to think outside the box
- § Enables you to become amore creative person
- § Surrounds you with a feeling of magic and fantasy
- § Provides an escape from your own world
- § Lets you indulge and enjoy yourself
- § Really allows you to relax
- § Dramatic and exciting
- § Provides you with a puzzle or mystery to solve
- § Allows you to immerse yourself in a different culture
- § Gives you something to talk about
- § Creative and innovative
- § Connects with people in a real human way
- § Makes you feel good about yourself
- § Inspirational
- § Helps create who you are
- § Encourages you to develop your own point of view
- § Allows you to pursue your passions and interests
- § Makes you a deeper thinker
- § You come away feeling like you really learned something
- § Fills you with hope and optimism
- § Part of a well educated group of people
- § Makes you feel safe and secure
- § Empowers you
- § Helps you become a better person
- § Something of great importance
- § A source you trust
- § Helps you seek truth
- § Enhances or rounds out your education
- § More.....

Escape

PLAYING VIDEO/COMPUTER GAMES

Surrounds you with a feeling of magic and fantasy
Provides an escape from your own world

Really allows you to indulge and enjoy yourself
Really allows you to relax

PEOPLE MAGAZINE

Dramatic and exciting
Provides you with a puzzle or mystery to solve
Allows you to immerse yourself in a different culture
Creative and innovative

READING A NOVEL OR BESTSELLER

Doesn't just tell you about something, but makes you feel it emotionally

LOCAL CAFE

LISTENING TO MUSIC

DOING SUDOKU OR CROSSWORD

TRAVELING TO A FOREIGN COUNTRY

ATTENDING THEATER/BALLET/SYMPHONY

Makes you feel like part of a social group
The kind of thing you can really immerse yourself in and savor
Like an old friend
Challenges you to think outside the box

STARBUCKS

Creates fond memories Enables you to become a more creative person

READING A BIOGRAPHY OR N/F BOOK THE DISCOVERY CHANNEL

NATL. GEOGRAPHIC THE HISTORY CHANNEL TIME MAGAZINE

Looks at a subject or issue from many different perspectives
Brings the whole world into your home

Transformation

VISITING A MUSEUM OR ART GALLERY

TAKING A CLASS FOR FUN

Connects with people in a real human way Encourages you to develop your own point of view
Makes you feel good about yourself Makes you feel smart
Allows you to pursue your passions and interests

Inspirational Helps you gain a broader perspective on life
Helps create who you are Makes you a deeper thinker

Fills you with hope and optimism Part of a well-educated group of people
You come away feeling like you really learned something

Makes you feel safe and secure Empowers you

Helps you become a better person

READING THE LOCAL NEWSPAPER

WATCHING THE LOCAL TV NEWS

WATCHING A DOCUMENTARY

Helps you become an expert Brings knowledge to everyone, not just a select few
An authority in its field

Allows you to get really in-depth on a topic Provides knowledge or information that's very relevant to your own daily life

TAKING A COMPUTER/TECHNOLOGY COURSE

Provides instant access to information

Provides do-it-yourself information

PUBLIC LIBRARY COM

Provides information and answers right at your fingertips

ENCYCLOPEDIA BRITANNICA

Provides tools for very practical purposes

ATTENDING CHURCH OR RELIGIOUS SERVICE

Enhances or rounds out your education
Helps you be self reliant
Serves a serious purpose

Helps you make informed decisions
Points you in the right direction

GETTING A COLLEGE DEGREE

CONDUCTING A JOB SEARCH

Purpose

Information

6. A belief that the library is a transformational force in people's lives is directly related to support

Escape

PLAYING VIDEO/COMPUTER GAMES

Surrounds you with a feeling of magic and fantasy

Provides an escape from your own world

Lets you indulge and enjoy yourself

Really allows you to relax

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Creative and innovative

LOCAL CAFE

Gives you something to talk about

LISTENING TO MUSIC

DOING SUDOKU OR CROSSWORD

MYSPACE.COM

Helps you express your individuality

TRAVELING TO A FOREIGN COUNTRY

Stimulates your curiosity about people, places and things

ATTENDING THEATER/BALLET/SYMPHONY

READING BLOGS

YOUTUBE.COM

Doesn't just present facts, but rather makes them come alive

A very impartial source – doesn't take a point of view

Makes you feel like part of a social group

The kind of thing you can really immerse yourself in and savor

Helps you be the first one to know new things

Like an old friend

Challenges you to think outside the box

STARBUCKS

READING A BIOGRAPHY OR N/F BOOK

THE DISCOVERY CHANNEL

Allows you to appreciate the beauty in life

Looks at a subject or issue from many different perspectives

Information

Transformation

VISITING A MUSEUM OR ART GALLERY

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ONLINE BOOKSTORES LIKE AMAZON.COM

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Makes you feel safe and secure

Empowers you

WIKIPEDIA.COM

Provides instant access to information

PUBLIC LIBRARY

Helps you become a better person

Provides you with basic information

Provides do-it-yourself information

Helps you seek truth

Something of great importance

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Points you in the right direction

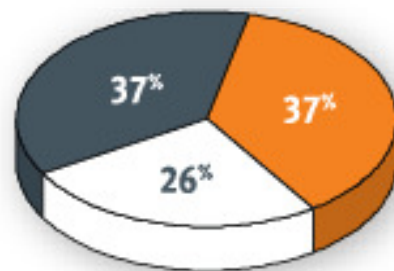
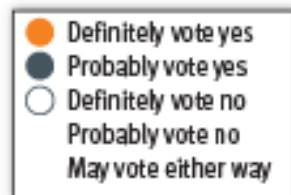
Purpose

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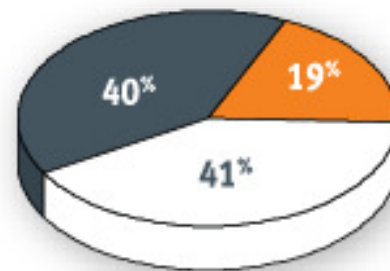
8 things we learned



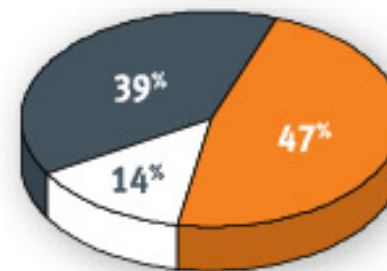
'Definite support' can be segmented



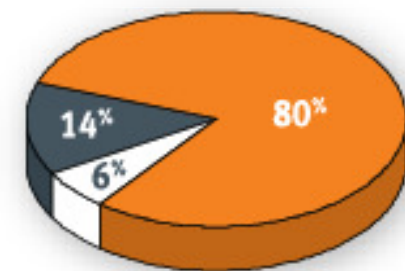
Total Voting Respondents



Barriers to Support



Probable Supporters

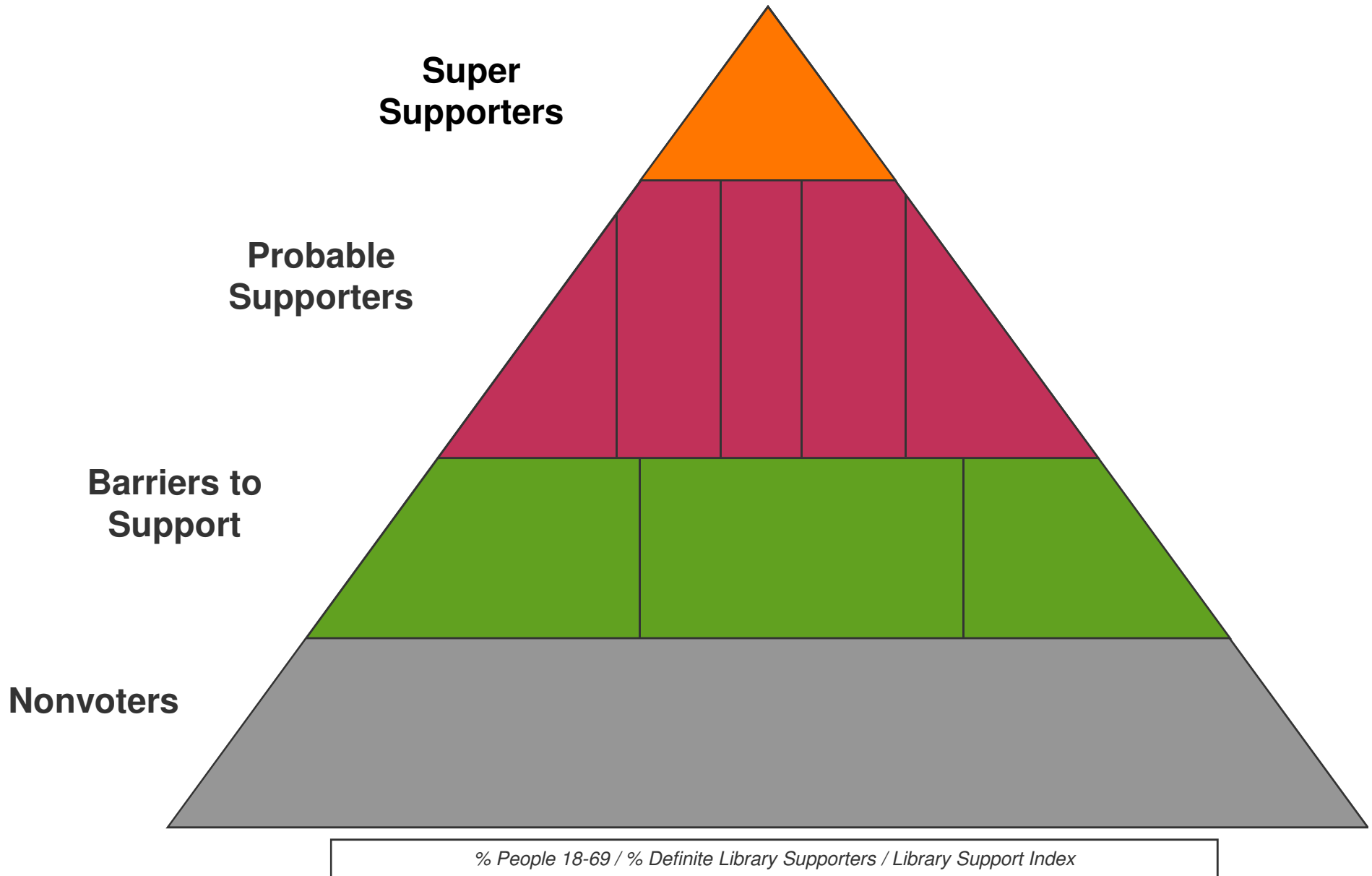


Super Supporters

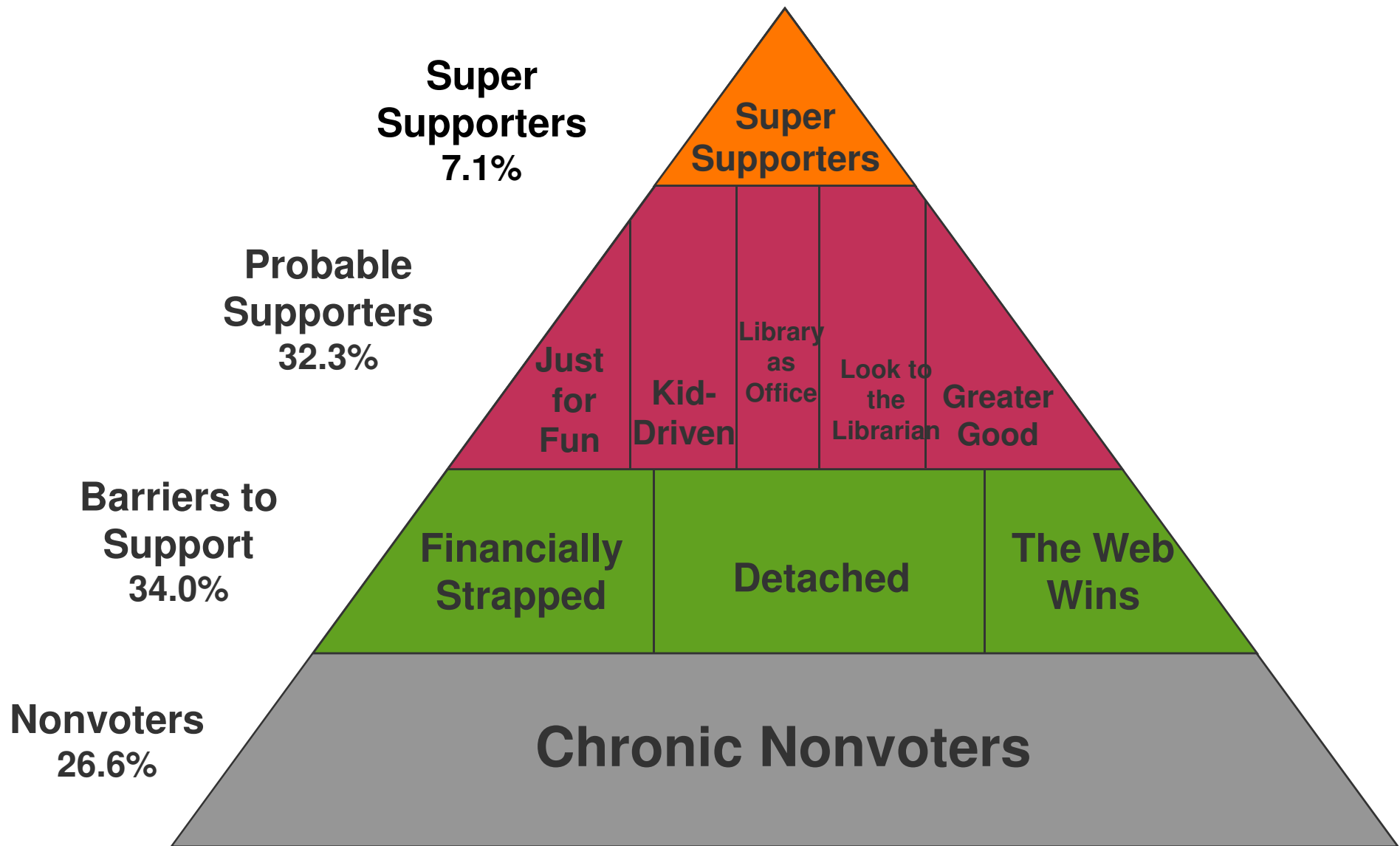
8. Increasing financial support for libraries may not mean a program trade-off

People willing to increase funding for libraries are also likely to support increased funding for other social programs.

Support can be segmented



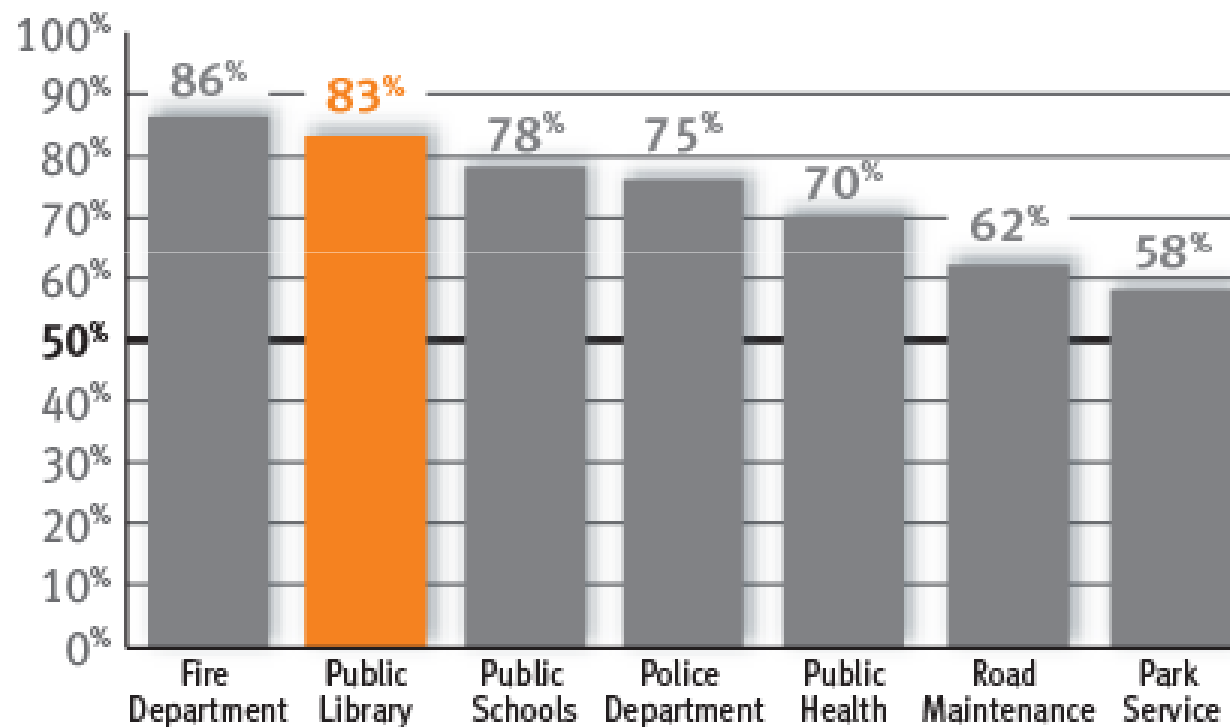
The are Super Supporters



% People 18-69 / % Definite Library Supporters / Library Support Index

Super Supporters support a lot

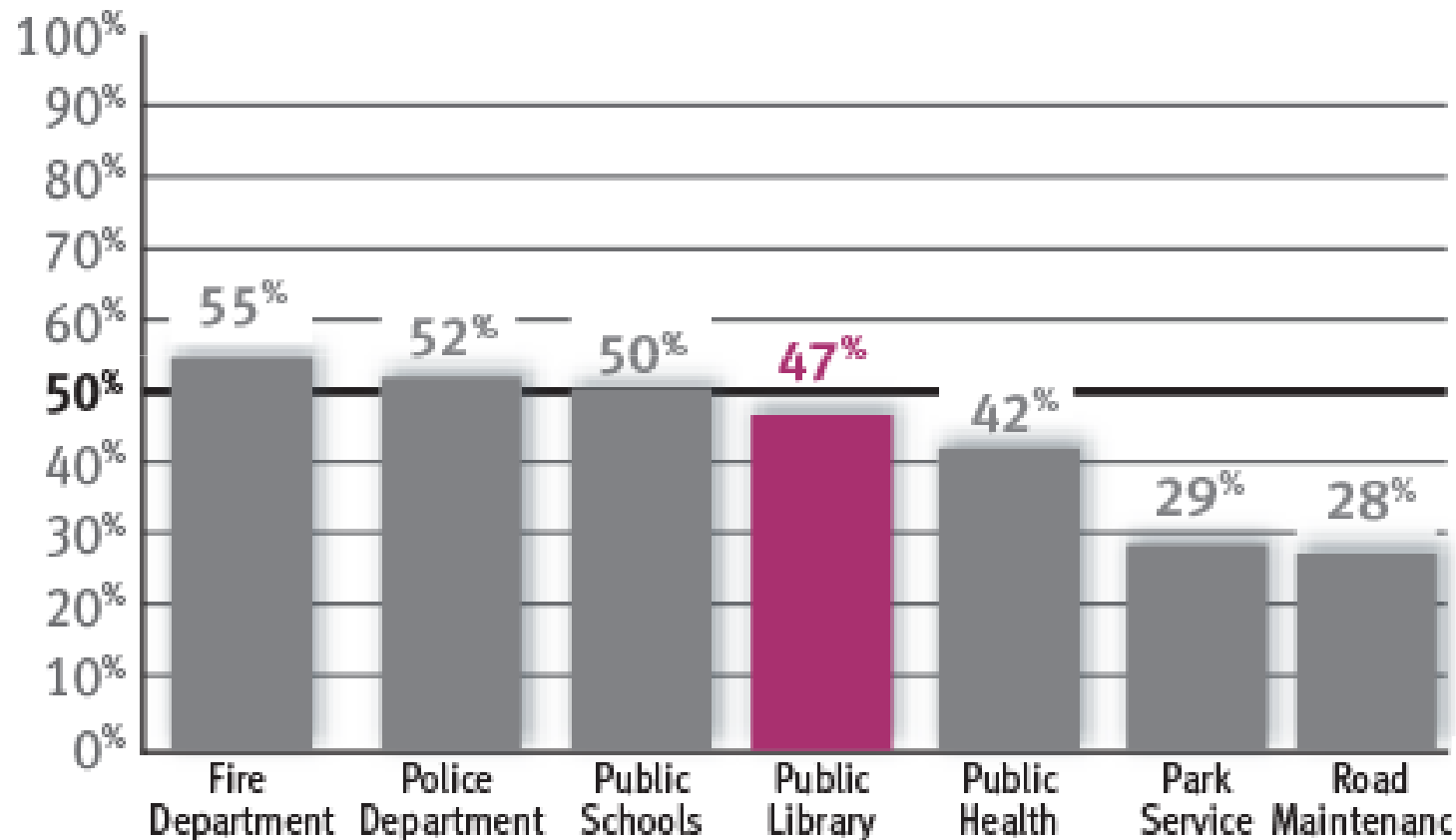
And, the library makes it to 2nd place on their list of things to support



**Super
Supporters**

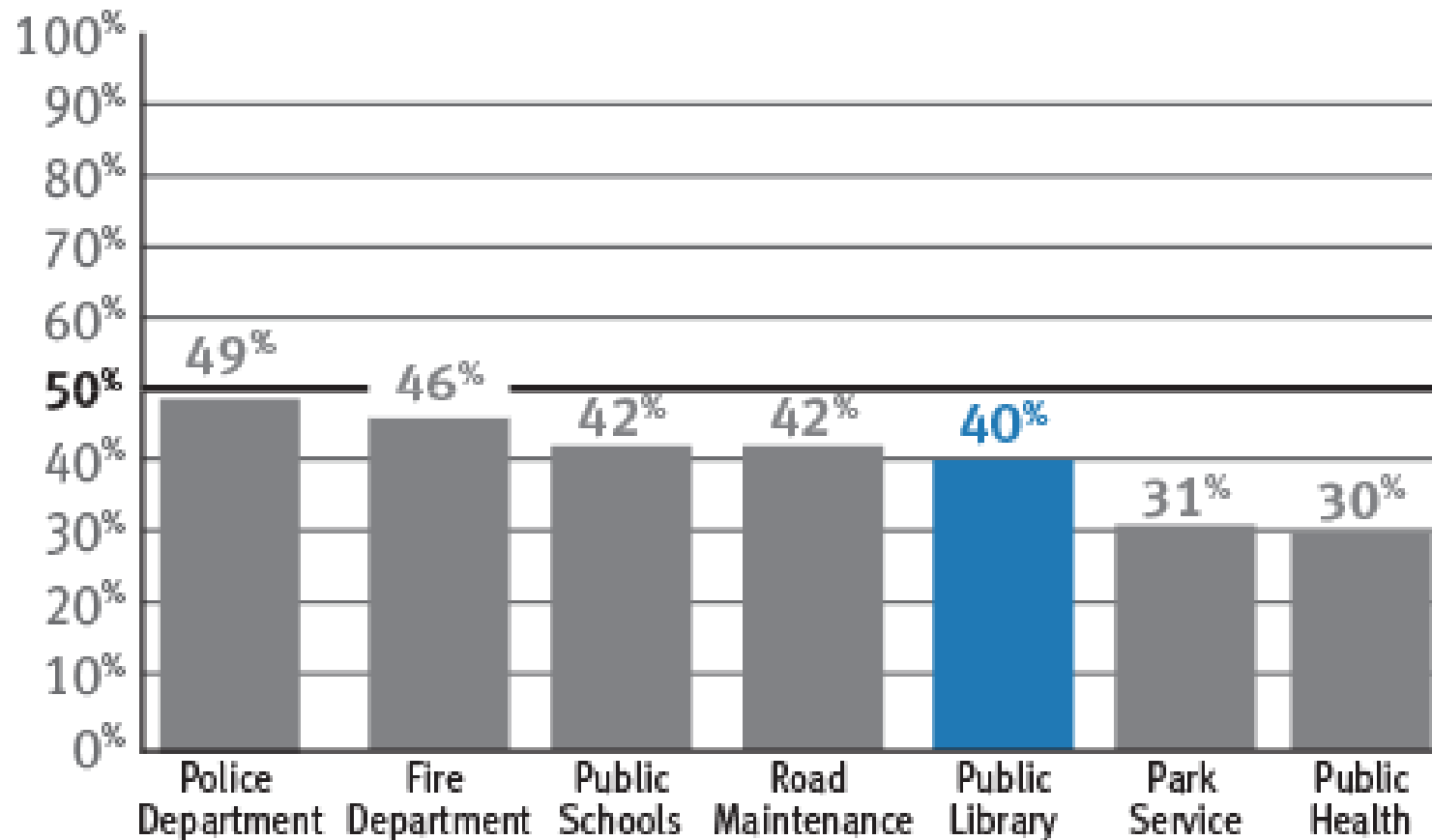
Probable Supporters - similar views

The library is 'in the competition' against other public services



Probable Supporters

Elected officials



We must reframe the library while laying out a case for funding

Information

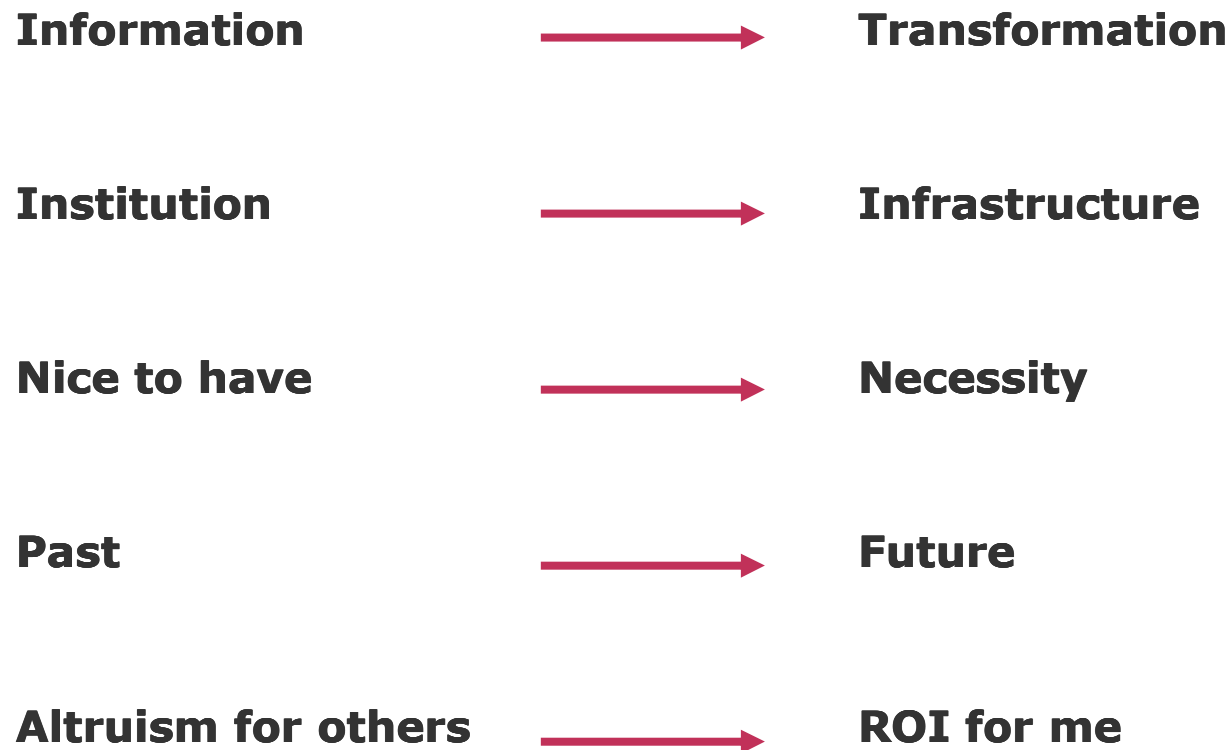
Institution

Nice to have

Past

Altruism for others

We must reframe the library while laying out a case for funding



The 1 thing we learned in 2009

**Everything can
change**

- § The U.S. economic condition is uncertain. Housing values are declining. Unemployment is rising. Confidence is low.
- § Personal and civic budgets are being stretched or cut.
- § People have moved from a trade-up to a trade-off mindset. The majority of people have already made behavioral changes in order to cope with economic factors, including visiting the library more often.
- § Institutional mistrust is high.
- § A renewed focus on self-reliance, with the majority of respondents saying that “you really need to rely on yourself in tough times”.
- § People are rediscovering the things they find most valuable in their lives.

The Library

My Library

2008

2009

Information



Transformation

Institution



Infrastructure

Nice to have



Necessity

Past



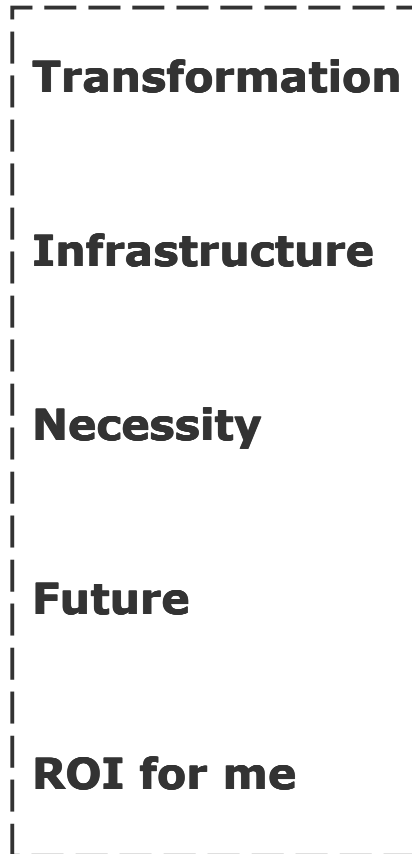
Future

Altruism



ROI for me

for others



The Library

My Library

2008

2009

Information



Transformation



My Transformation

Institution



Infrastructure



Infrastructure

Nice to have



Necessity



Necessity

Past



Future



My Future

Altruism



ROI for me



ROI for me

for others

Field Testing

- § Bill & Melinda Gates Foundation awarded a \$5M grant to conduct a field test
- § The creative and program was developed based on these research finding
- § Run a full-scale campaign in 2 states across 50 libraries from June – December 2009

Create a discussion and move perceptions within a community

- § Shows the potential to shift perceptions of the library from “information” to “transformation”
- § Activates Probable Supporters and mobilizes Super Supporters
- § Creates a foundation to drive commitment to financial support for the library, when the time is right
- § Makes the library personally relevant
- § Raises awareness, drives action and sparks conversation
- § Has stopping power and staying power - “not your traditional library message”



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