From awareness to funding

This report summarizes the research findings of an advocacy research grant awarded to OCLC by the Bill & Melinda Gates Foundation. The grant was awarded to conduct research, develop strategies, create materials and evaluate the potential of marketing and communications programs aimed at increasing and sustaining library funding for U.S. public libraries.
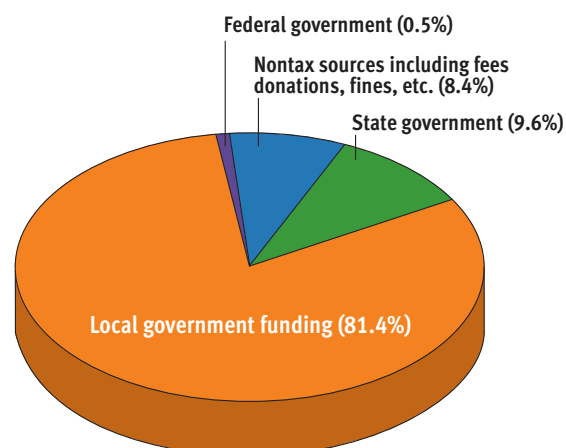
The problem:

Public library use in the United States is growing. Circulation and visits to U.S. libraries are increasing and a wide range of services, such as literacy classes, teen programs and public access computing, are also experiencing strong demand. But the public funding required to sustain the variety, use and appetite for library services is not keeping pace with demand. For many public libraries, particularly those in smaller rural communities, funding is a growing concern.

Federal and state funding for public libraries has flattened or declined, and the ability to raise funds from local sources, which represent 81% of all library funding, has also become more difficult.

Library levies and referenda are being placed on election ballots less frequently in recent years and passage rates of the library levies that make it to the ballot have steadily declined over the past decade.
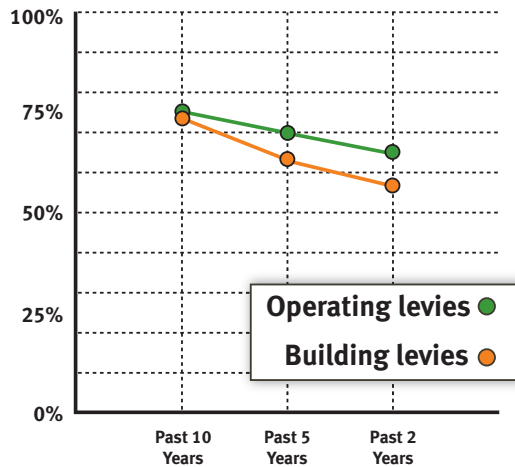
Public library funding

Federal government (0.5%)

Nontax sources including fees donations, fines, etc. (8.4%)

State government (9.6%)

Local government funding (81.4%)

Source: National Center for Education Statistics, 2007

As a result, for many U.S. libraries, operating expense increases are now outstripping funding.

Rate of success of library levies

Source: *Library Journal* Public Library Referenda, 2006

Without some action, this funding problem will not self-correct and is likely to worsen. Public library budgets face significant economic strains with increased energy and healthcare costs and declining property values, leading to a reduction in local property taxes, the source of most local library funding. The cost of employee benefits increased 62% between 2000 and 2005, just one factor that has resulted in a 12% reduction in spending on collections and programs (source: National Center for Education Statistics; figures not adjusted for inflation).

Public libraries are not alone in facing these economic challenges. As the economic factors that impact libraries also impact other locally funded services such as police, fire service and education, there will be heightened competition for a share of the community purse. The research findings will show that voters do not necessarily trade-off funding support to one public service for another, and those who vote for increased funding do so across all services. However, libraries must effectively communicate their value to local voters and funding bodies to ensure that they are included for consideration. Most voters are unaware of the source and status of library funding in their communities, and many rural and suburban libraries lack the resources to create the library advocacy and marketing programs required to increase awareness.

The advocacy research goal:

The goal of the research project was twofold: first, to understand the factors that both drive, and limit, local library funding support; second, to ascertain whether a national library support campaign could be effective at increasing and sustaining funding for U.S. public libraries by reaching and influencing the segments of the voting population that have the most potential to become committed library supporters.

The project was designed to test the application of traditional market research, segmentation and targeting techniques to the library funding problem. Could marketing segmentation methods, targeted campaigns, tailored messaging and grassroots advocacy activities create a positive difference for library funding?

Our research findings suggest that the answer to this important question is 'yes.' This conclusion was reached after the evaluation of findings from five market research activities:

1. **Market segmentation analysis** to identify the most likely, and least likely, library funding supporters

2. **Quantitative research** to identify the most important library funding drivers for voters and elected officials

3. **Qualitative research** to learn more about the most likely library funding supporters, their attitudes about their library, their attitudes about their community and their willingness to actively support increased library funding

4. **Campaign strategy development** to create messaging and approach for a national library support campaign to target the most likely library funding supporters and increase their commitment

5. **Creative concept field tests** to test messaging and approach for a national library support campaign with target segments of the voting population and elected officials.

Detailed findings from the quantitative research, market segmentation and qualitative research are presented in this report. The report concludes with an overview of creative concept development, field test findings and potential next steps.

What we learned:

1. Building market segmentation

A primary goal of the advocacy research project was to create a segmentation and targeting framework of U.S. residents ages 18 to 69 in cities, towns and suburbs with populations of less than 200,000. More than 90% of all U.S. public libraries serve communities of this size.

The survey results provided important high-level understandings about commitment to library funding among the U.S. voting population. For example, survey results show that 74% of respondents would *probably* or *definitely* support a library referendum if there was one on the ballot at the next local election. While this appears to be a positive finding, it is not consistent with the results many libraries are experiencing at the voting booth in their local communities. If 74% of U.S. residents were consistently voting 'yes' for library referenda, ballot initiatives and bond measures, the public library community would be better-funded, and the rate and margin of success for library levies would be much higher than has been the case

for the last several years. Therefore, a '*probably* vote yes' answer on voting intent does not always translate to actual favorable voting behavior.

While 74% of respondents indicate that they would either *probably* or *definitely* vote in favor of a levy, that support is evenly split. Only 37% of respondents indicated they would *definitely* vote in favor of a library levy, too few to pass a library referendum in any state. Understanding which voters are most likely to provide *definite* library funding support, which voters will provide limited or no library funding support, and which voters represent *probable* support for increased library funding was a primary goal of the quantitative research.

Using a robust market segmentation methodology developed by OCLC's research partner, Leo Burnett, the survey data were analyzed to create a Library Supporter Segmentation framework that categorizes and profiles segments of the voting population in relation to their level of commitment to public library funding support.

The segmentation analysis identified six constructs that are the key drivers of library funding attitudes and behaviors: residents' likelihood of voting favorably if a library referendum is on the ballot; residents' general voting behavior; their stated barriers to using or supporting the library; the library services they use; their overall attitudes toward the library; and finally, their perceptions of librarians.

Significantly and surprisingly, library funding support is not driven by demographics, i.e., income, age, gender, race, political affiliation, etc. Voters' attitudes, perceptions and behaviors, not their demographic profiles, are the most important determinants of willingness to support increases in library funding. Library support is more about a mindset or an attitude than a traditional demographic profile.

A Library Supporter Segmentation Pyramid was constructed based on the six identified constructs. Library supporters were categorized from those least likely to fund libraries at the ballot box (those at the bottom of the pyramid) to those most likely to vote 'yes' for a library referendum (those at the top of the pyramid).

The segmentation pyramid identified four distinct tiers:

Super Supporters: Voters at the top tier of the segmentation pyramid. These are people who are most firmly committed to supporting a library funding initiative.

Probable Supporters: Voters who are likely to support library funding initiatives but are not fully committed.

Barriers to Support: Voters who, for a variety of factors, have significant barriers to voting in favor of increased library funding.

Chronic Non Voters: People who are not registered to vote or have a track record of choosing not to vote in presidential and local elections. They also indicate they are not likely to vote in the future, and are therefore unlikely to provide support for library funding initiatives.

Library Supporter Segmentation Pyramid
Total Respondents
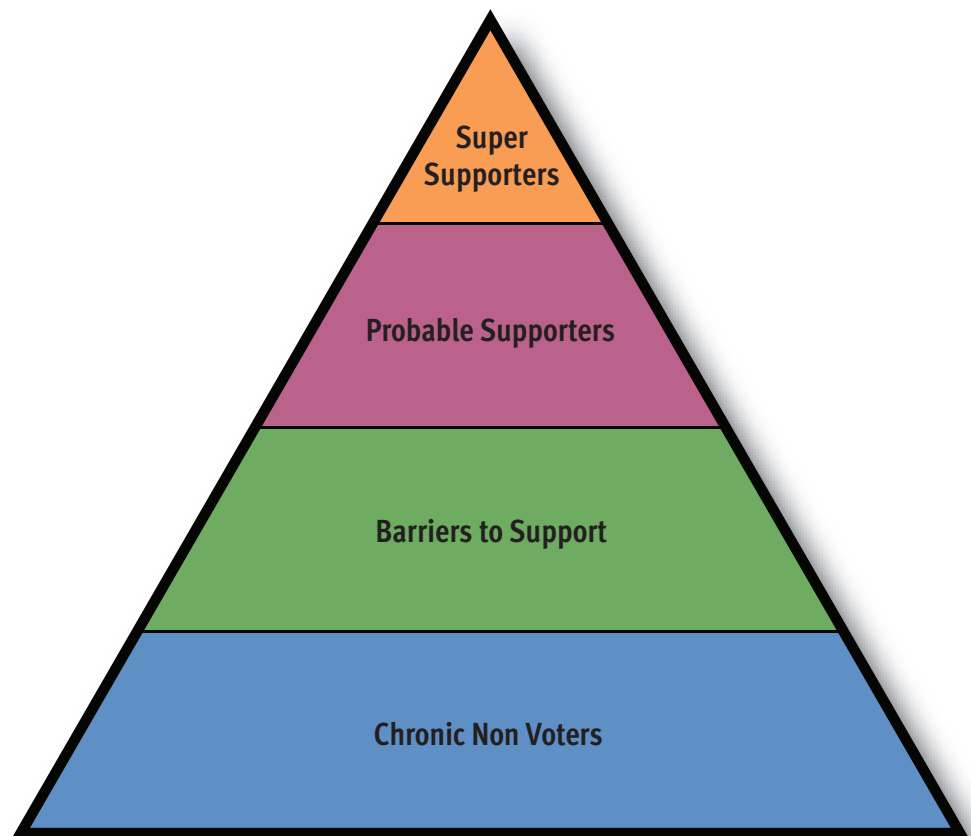
Population ages 18–69 living in communities of less than 200,000 residents
Source: *From Awareness to Funding*, OCLC, 2008

Profiles of the voter segments that make up the Library Supporter Segmentation Pyramid provide valuable insights about how to most effectively identify, select and influence individuals who support library funding. "Chapter 2: Who are the library's financial supporters?" provides a detailed review of the segmentation pyramid with a review of each tier and each of the 10 segments that make up those tiers.

While many U.S. libraries are funded at least in part by local library referenda, ballot initiatives and bond measures, not all communities fund their public libraries using library levies. Many communities fund libraries through resource allocation from general community funds. Local elected officials work with their constituents to allocate funding to libraries and other public services.

Quantitative research was also conducted to better understand the attitudes and opinions local elected officials hold about libraries and local library funding. Elected official respondents are higher-than-average users of the library and believe that the library is an important community resource. Surprisingly though, given their involvement with the library, the majority of local elected officials feel that their libraries have sufficient funds to meet their day-to-day operational needs.

When asked to indicate which of a number of public services they would agree to fund through an increase in local taxes, most elected officials indicated a higher likelihood to support funding initiatives for the fire department, public schools and police department than for the public library. "Chapter 3: Elected officials and library funding" provides a detailed review of the research findings relating to elected officials.

2. Quantitative research—identifying the drivers of library funding

The quantitative survey provided significant detailed information about the factors that drive, and limit, funding support of U.S. public libraries. These include information about the attitudes and behaviors of the respondents relating to libraries, librarians, the library's role in the community and respondents' willingness to increase taxes to support an increase in funding for libraries and other locally funded public services. There were eight important findings derived from the quantitative research:

1. **Most people claim they would support the library at the ballot box—fewer are firmly committed to it.**

2. **There is a lot that people don't know about their public library.**

3. **Library support is only marginally related to visitation. Advocating for library support to library users focuses effort and energy on the wrong target group.**

4. **Perceptions of the librarian are highly related to support. 'Passionate librarians' who are involved in the community make a difference.**

5. **The library occupies a very clear position in people's minds as a provider of practical answers and information. This is a very crowded space, and to remain relevant in today's information landscape, repositioning will be required.**

6. **Belief that the library is a transformational force in people's lives is directly related to their level of funding support.**

7. **Increasing support for libraries may not necessarily mean a trade-off of financial support for other public services.**

8. **Elected officials are supportive of the library—but not fully committed to increasing funding. Engaging Probable Supporters and Super Supporters to help elevate library funding needs is required.**

More detail about the key drivers of library funding can be found in "Chapter 4: Library funding support is an attitude, not a demographic."

3. Qualitative research—understanding attitudes toward libraries and library funding among the most likely supporters

The findings of the quantitative research were further informed by qualitative research. The objective of the qualitative research was to gain a more in-depth understanding of two key market segments, the Probable Supporters and the Super Supporters, and their perceptions of the local library today.

Ten focus groups were conducted in April 2007, including one group of Super Supporters and one group of Probable Supporters each in: Huntsville, Alabama; McPherson, Kansas; Medford, Oregon; Minneapolis, Minnesota; and Pittsburgh, Pennsylvania.

The findings of the qualitative research reinforced the quantitative research results. Respondents have rich and detailed memories of their first experiences at the library and strong, positive current perceptions of the library. Respondents who have the strongest beliefs that the library is a source of transformation are those who are most passionate about the need to protect, support and fund the library.

However, the focus groups also showed that even the most avid supporters of the library have concerns about the relevance of the public library in today's world and their favorable vote in support of library funding initiatives cannot be assumed. While Probable Supporters and Super Supporters have a strong emotional connection to the public library, that connection is latent and is exhibited fully only during the use of projective research techniques. Discussion during the focus groups about a potential tax increase in support of public library funding highlighted other issues that any library support marketing campaign would need to overcome. Voters have little or no awareness of how their local public libraries are funded and are also unaware of any funding problems.

It was clear that the positive emotional connections that Probable Supporters and Super Supporters have with libraries were not always sufficient to convince them to increase library funding. Instead, the research indicated a need to appeal to both the heart and mind of the potential voter, positioning the library as an important part of the community's infrastructure that plays a key role in providing equal access to resources vital for thriving in today's digital world. "Chapter 5: Motivating Probable and Super Supporters—testing the facts in the field" provides more in-depth information about the findings of the qualitative focus groups.

Telephone interviews with elected officials provided similar insights. Elected officials hold attitudes similar to those of Probable Supporters. While elected officials have strong positive associations with the library and believe it plays a key role in the community, pragmatic factors often temper their support for increasing taxes.

4. Campaign strategy development—creating messaging to motivate the most likely supporters to action

The problem a library support campaign strategy must consider is how to turn the tide of dwindling library funding support in an environment where people think libraries are becoming less relevant, where we can anticipate tougher tax choices and where market-specific conditions vary.

The proposed solution is to create and promote a brand—not a library product brand focused on marketing library consumption (i.e., usage) but a library *support* brand. The brand must do more than position the library as relevant—it must activate citizen participation and drive positive funding behavior.

Based on the research findings, the OCLC and Leo Burnett team developed a library support brand strategy and outlined options for messaging and specific marketing tactics for a library support campaign to move the most likely voters from *probable* support of library referenda to *definite* support.

The brand strategy and campaign messaging options are based on the following communications objectives:

Make the library relevant for the 21st century.

Instill a sense of urgency by putting the library in the consideration set for local funding with other public services, like police, parks and fire.

Activate a conversation about how the library is a vital part of the community's infrastructure and future.

Several creative concepts were developed based on these communications objectives. Each creative idea was embodied in the form of an image and a messaging narrative that could form the basis for a library support brand and associated campaign. "Chapter 6: Mobilizing Probable and Super Supporters— what makes the difference" provides details on the creation and testing of campaign strategies.

5. Creative concept field tests—evaluating the potential for a library support campaign to impact voters and elected officials

Creative concepts were developed specifically for the purposes of evaluative testing with Probable Supporters, Super Supporters and elected officials. The creative directions were evaluated by focus groups of Probable Supporters (five groups) and Super Supporters (one group) in McPherson, Kansas; Huntsville, Alabama; and Minneapolis, Minnesota. The concepts were also reviewed by elected officials during phone interviews. Qualitative research findings were analyzed to establish the creative direction for a potential library support campaign.

Responses from voters and elected officials were evaluated against a number of criteria:

- Can this creative direction effectively create a library support brand?
- Does the idea position the library as transformational?
- Is the message broad enough to resonate with all target audiences?
- Does the idea push people to think about the library differently?
- Is the idea compelling and motivating?
- Is the tone of voice appropriate for the 'universal' library brand?

Overall, the feedback from Probable Supporters, Super Supporters and elected officials about the concepts was positive. The concepts held the potential to achieve the communications objectives and met the evaluative criteria. Concepts resonated with the voters and elected officials and reflected an aspect of what they believed to be true about the library. When respondents were asked to compare and contrast concepts, each idea was selected as a favorite of one or more respondents. Respondents often wanted to combine concepts.

Probable Supporters and Super Supporters were easily prompted by the concepts to begin a discussion of the library support problem and they did not respond negatively to raising the issue of library funding. The response to the creative directions indicated that the right campaign can generate the desired response from our target segments, repositioning the library as relevant for the 21st century, instilling a sense of urgency to support the library in various ways, and activating conversation with their friends and families. The participants expressed a desire to find out more and specifically learn more about what their local elected officials thought about funding the library.

Local elected officials saw the potential for the concepts to provide them with a positive platform they could use to dialogue with their constituents. The platform also influenced them personally to give support to library funding initiatives. "Chapter 6: Mobilizing Probable and Super Supporters—what makes the difference" provides more detail about the potential impact of the creative concepts as part of a national library support campaign.