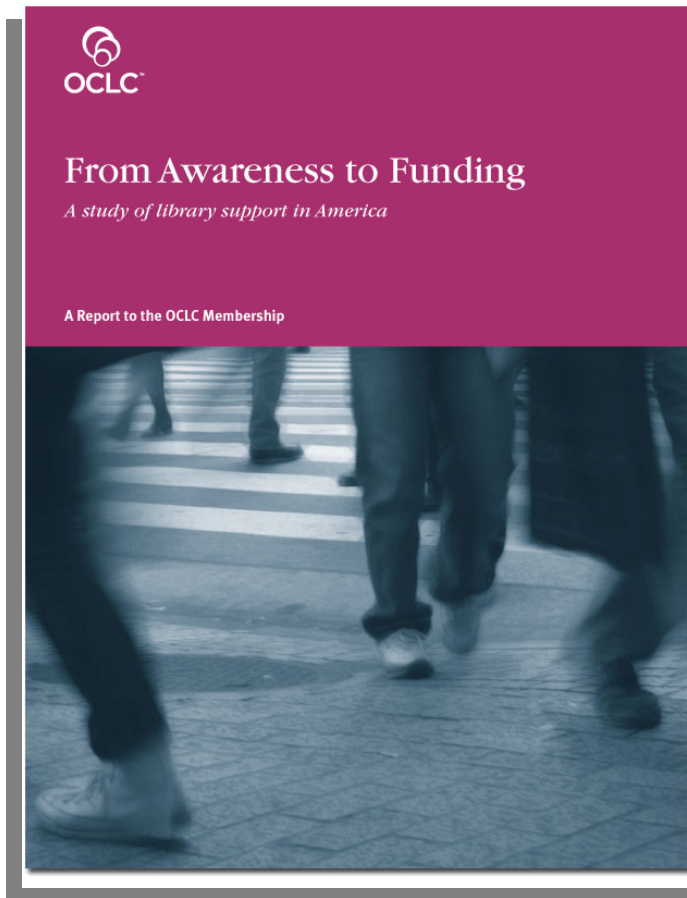




From Awareness to Funding

A study of library support in the United States



Cathy De Rosa

OCLC

Vice President for the Americas &
Global Vice President of Marketing

www.oclc.org/reports

**An
Opportunity
to
Transform....**

Reality

In 2005, libraries reported (NCES):

- 1/3 reported a budget decrease
- 1/3 reported a flat budget
- 1/3 reported a single digit budget increase

Thanks to The Bill & Melinda Gates Foundation

Is it possible?

.....for a national advocacy campaign to create an environment that influences the behavior of voters and local elected officials to sustain and increase funding for U.S. public libraries.

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 to improve and sustain library funding.

Timing is (almost) everything.

The Opportunity to Transform

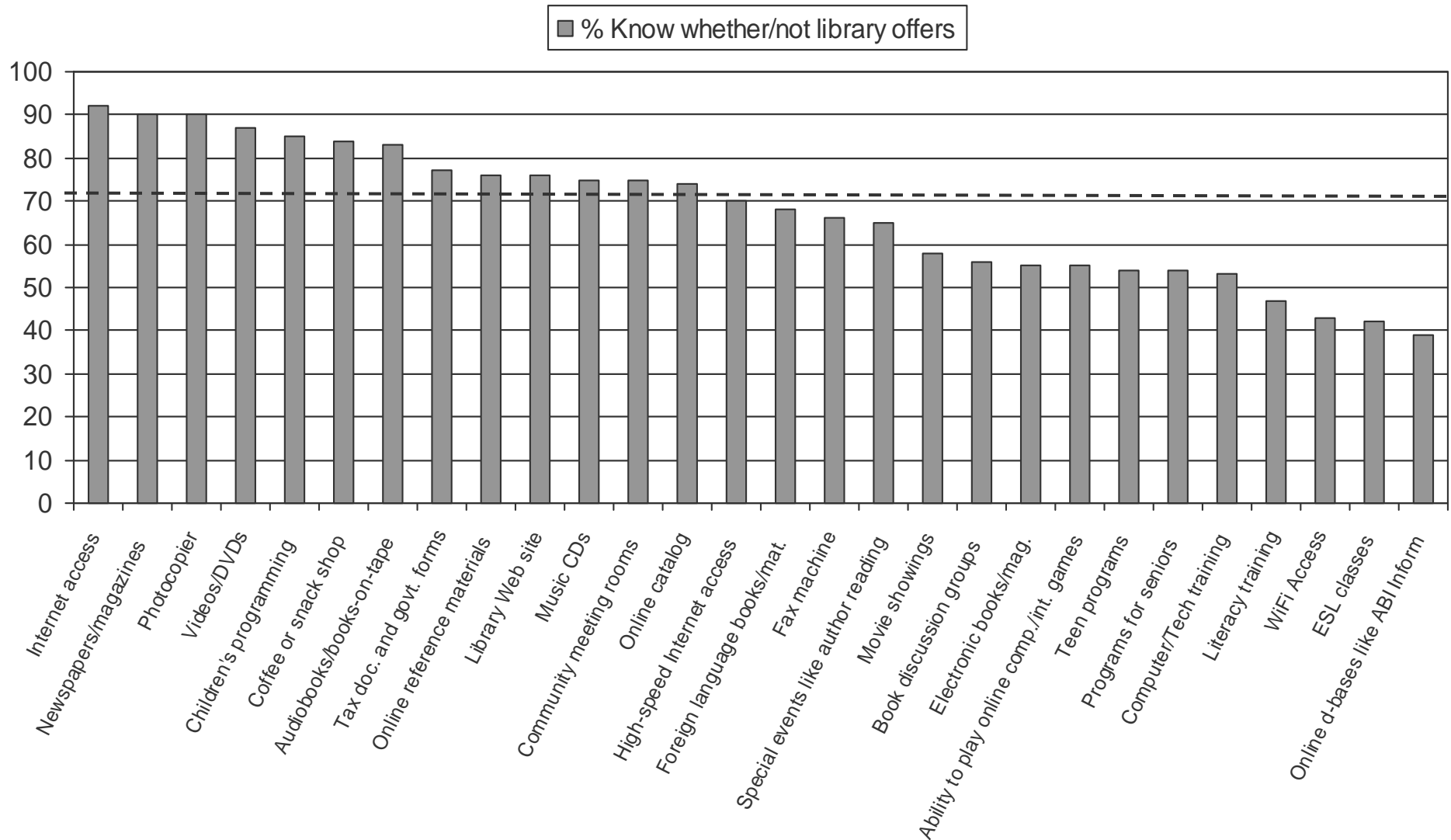
1. The research suggests that sufficient, but latent, support exists in local communities to improve library funding
 - Financial supporters of libraries are identifiable and can be moved to increase funding support
2. 80% of U.S. public library funding is local
 - Competition for the local purse is strong and intensifying
3. The key to motivating funding support for libraries is to position the library as vital to a community's infrastructure and a source of **transformation** for individuals and the community
4. Sustainability will require scale, timing and endurance

Key findings

Eight overall findings

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

People know about the library's basic offerings but know much less about the 'value-added' items

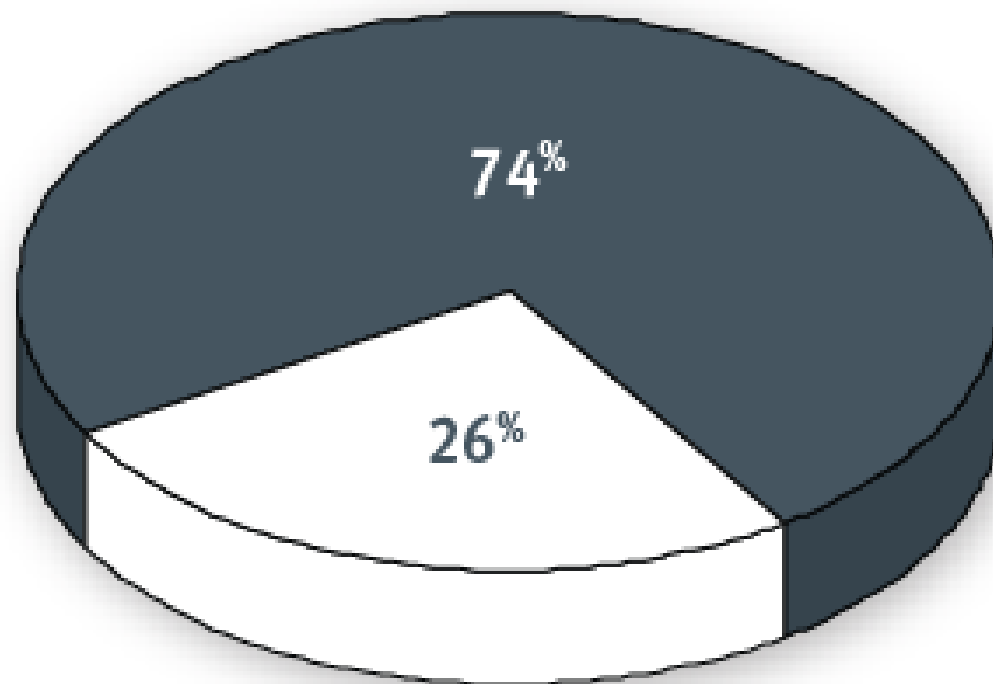


Eight overall findings

2. Most people claim they'll support the library at the ballot box—fewer are firmly committed to it

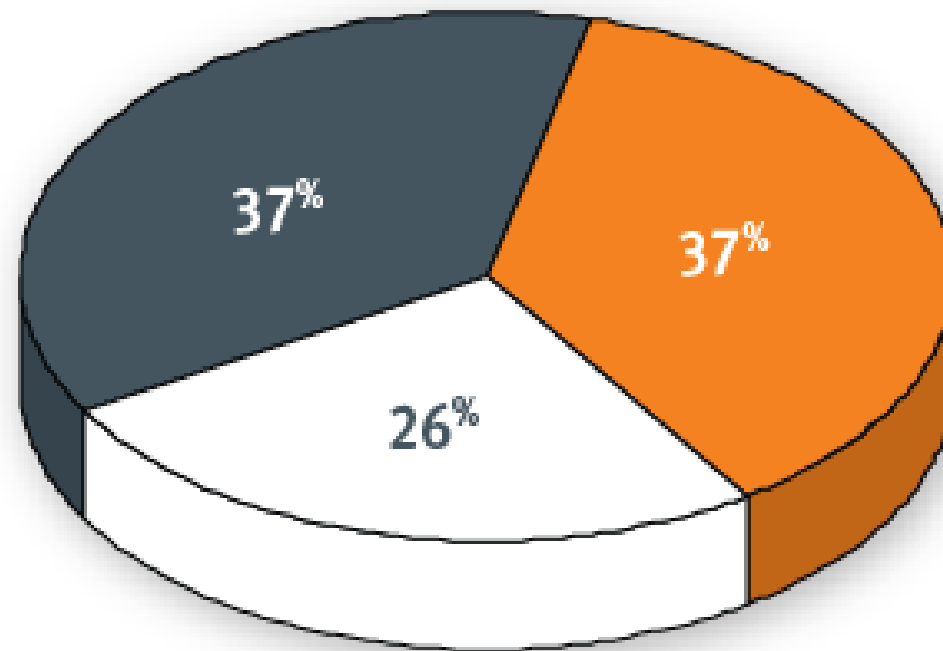
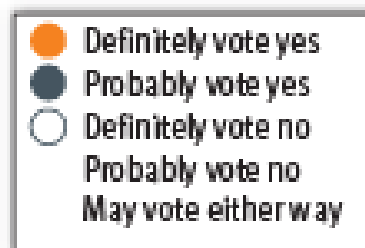
Three-fourths of people claim they are likely to support a library referendum

- Definitely vote yes
Probably vote yes
- Definitely vote no
Probably vote no
May vote either way



Total Voting Respondents

**Even during good times...
many fewer (37%) say that they'll *definitely* support
the library at the ballot box**



Total Voting Respondents

Eight overall findings

2. Most people claim they'll support the library at the ballot box—fewer are firmly committed to it

Commitment varies by definable groups (segments) of the community

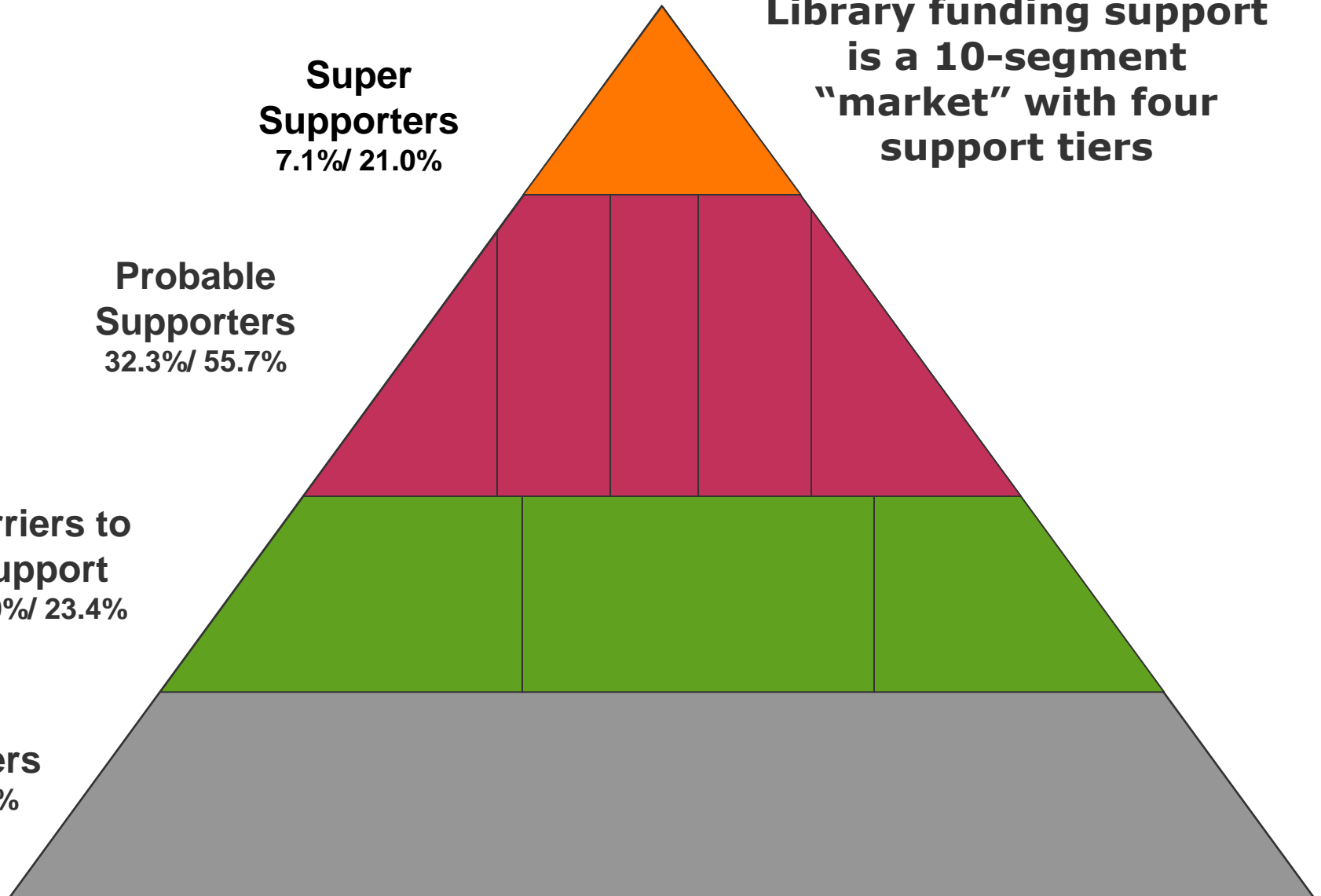
**Library funding support
is a 10-segment
“market” with four
support tiers**

**Super
Supporters**
7.1% / 21.0%

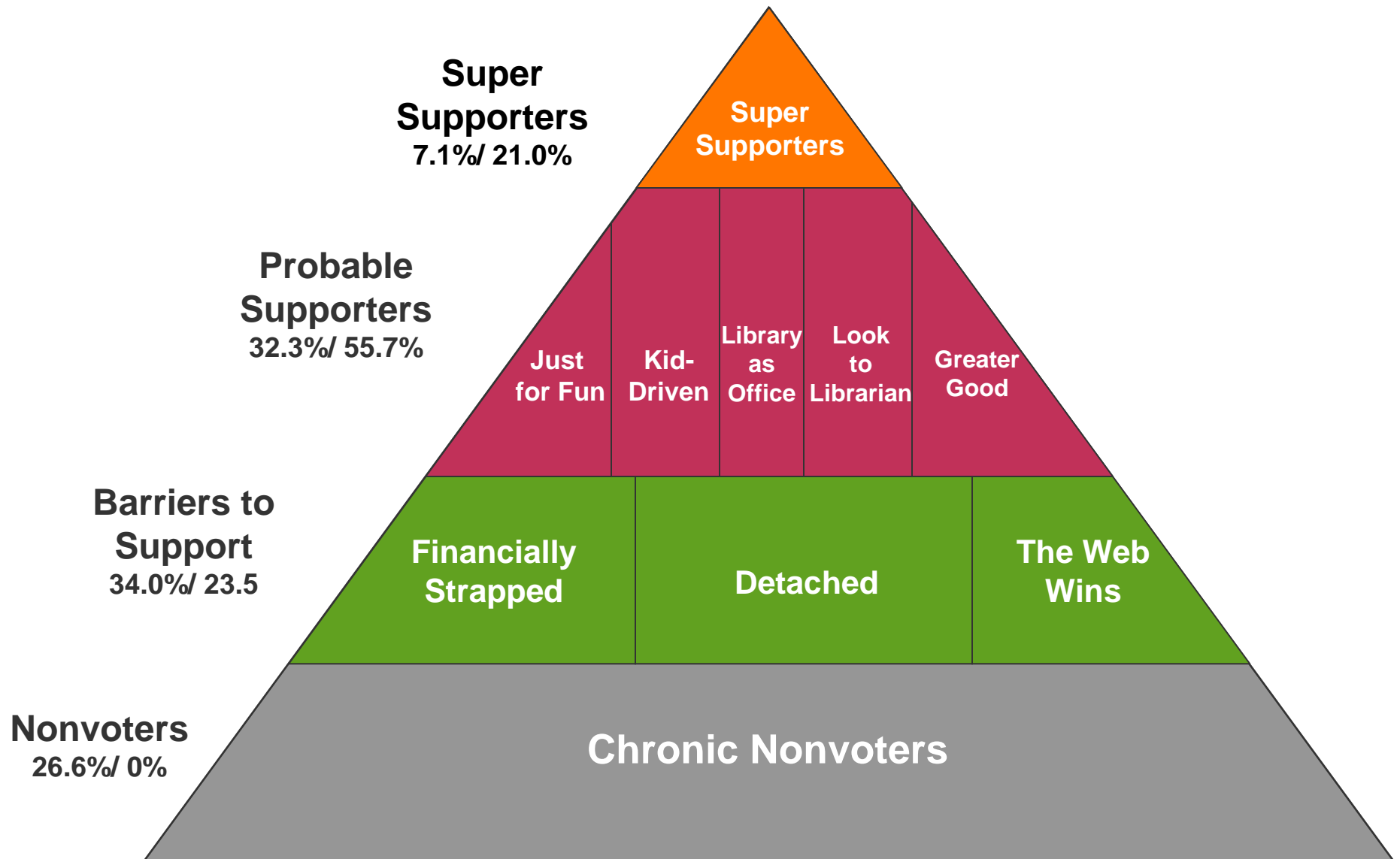
**Probable
Supporters**
32.3% / 55.7%

**Barriers to
Support**
34.0% / 23.4%

Nonvoters
26.6% / 0%

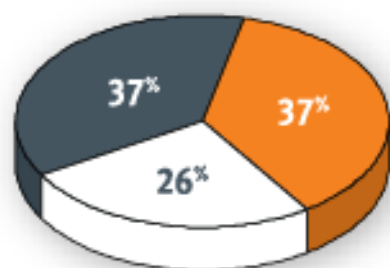
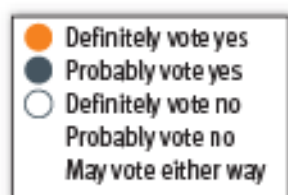


% People 18-69 / % Definite Library Supporters / Library Support Index

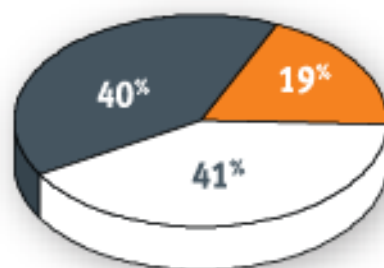


% People 18-69 / % Definite Library Supporters / Library Support Index

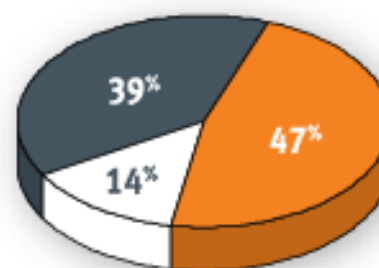
'Definite support' is the best measure for understanding who's truly committed, who isn't



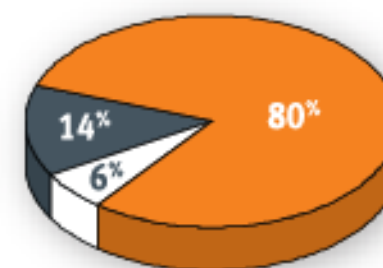
Total Voting Respondents



Barriers to Support



Probable Supporters



Super Supporters

Eight overall findings

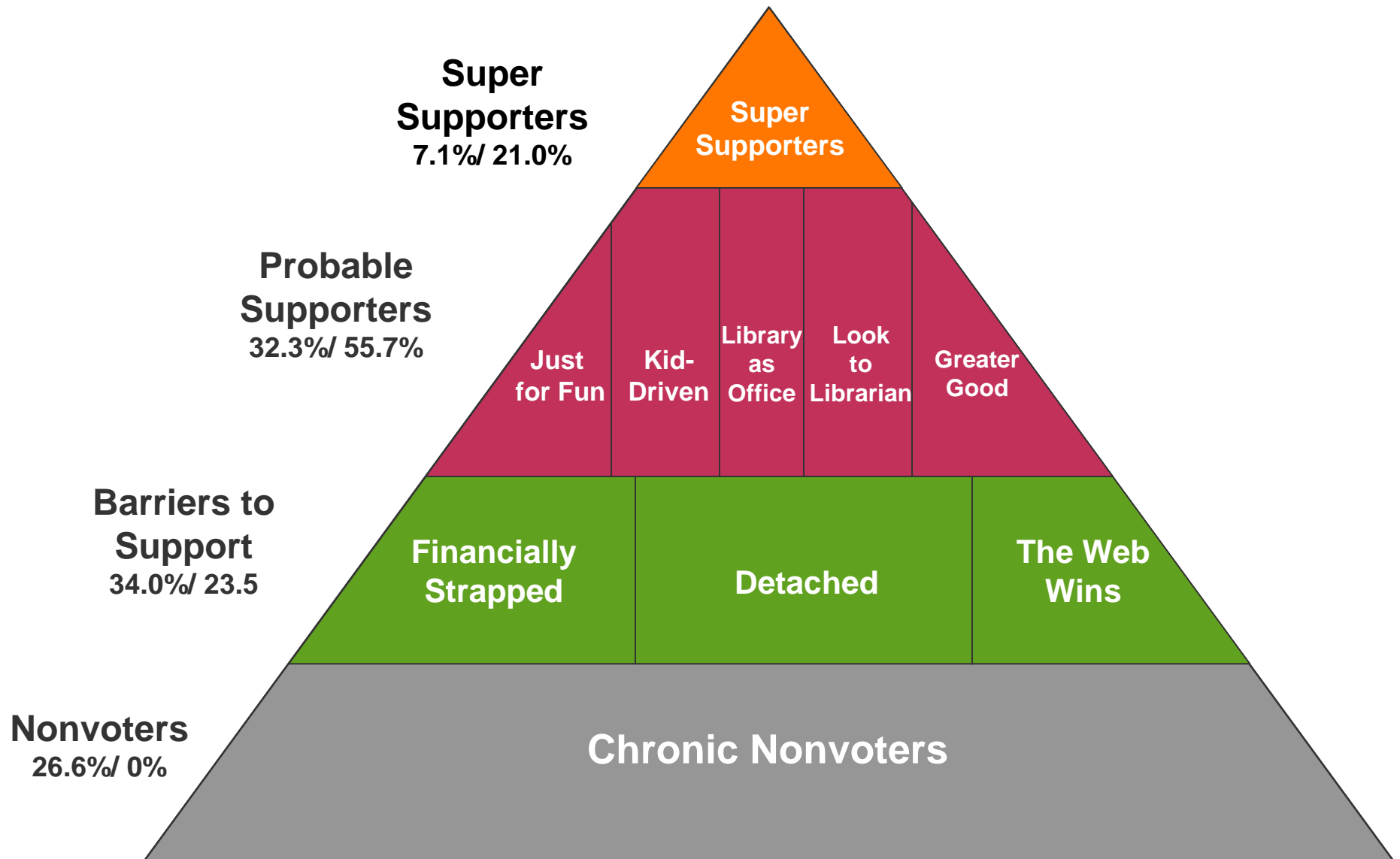
3. Library support is only marginally related to visitation

Eight overall findings

3. Library support is only marginally related to visitation

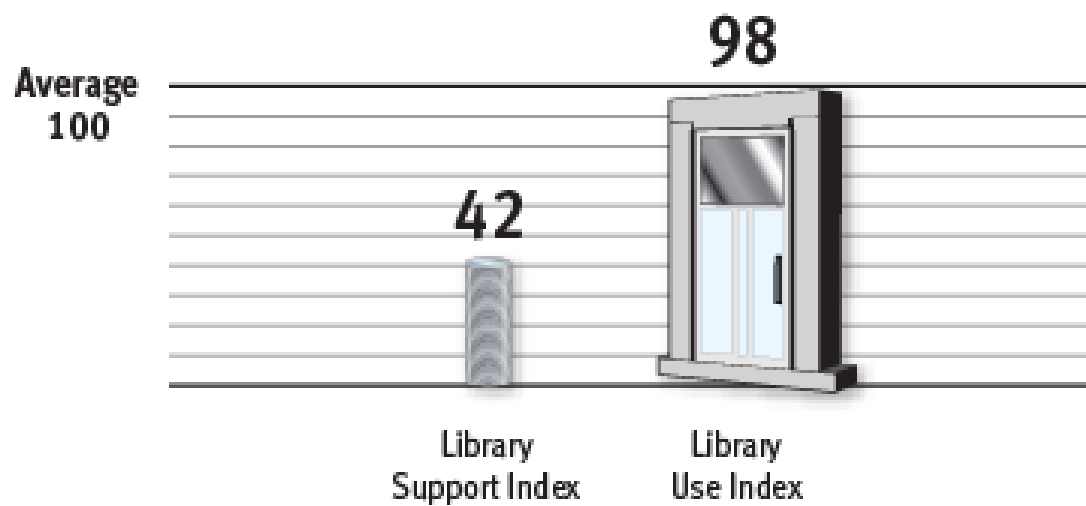
Library Visitors = Library Funders

Library Users = Library Funders

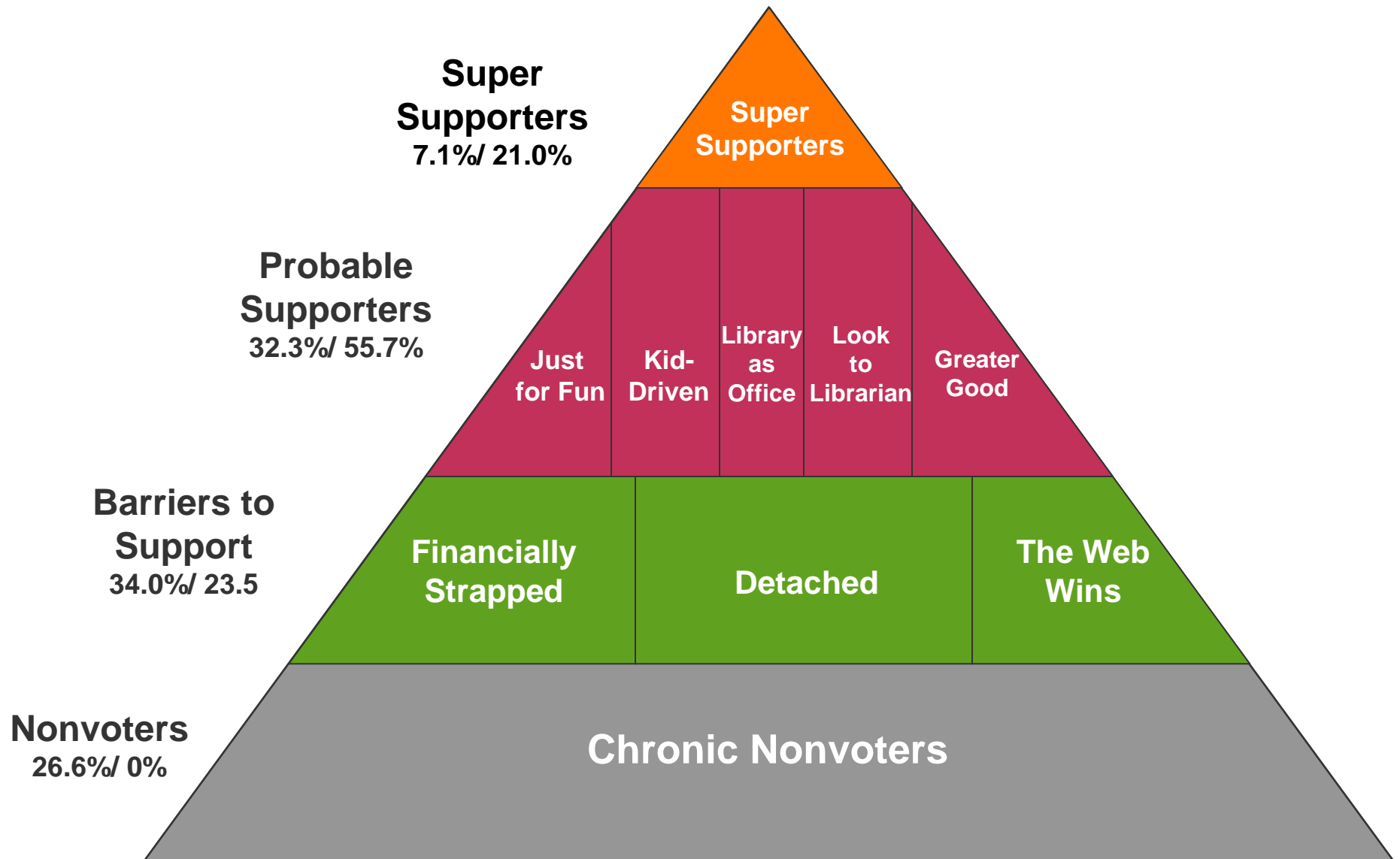


% People 18-69 / % Definite Library Supporters / Library Support Index

Despite average library usage, they're the least likely to support the library at the ballot box

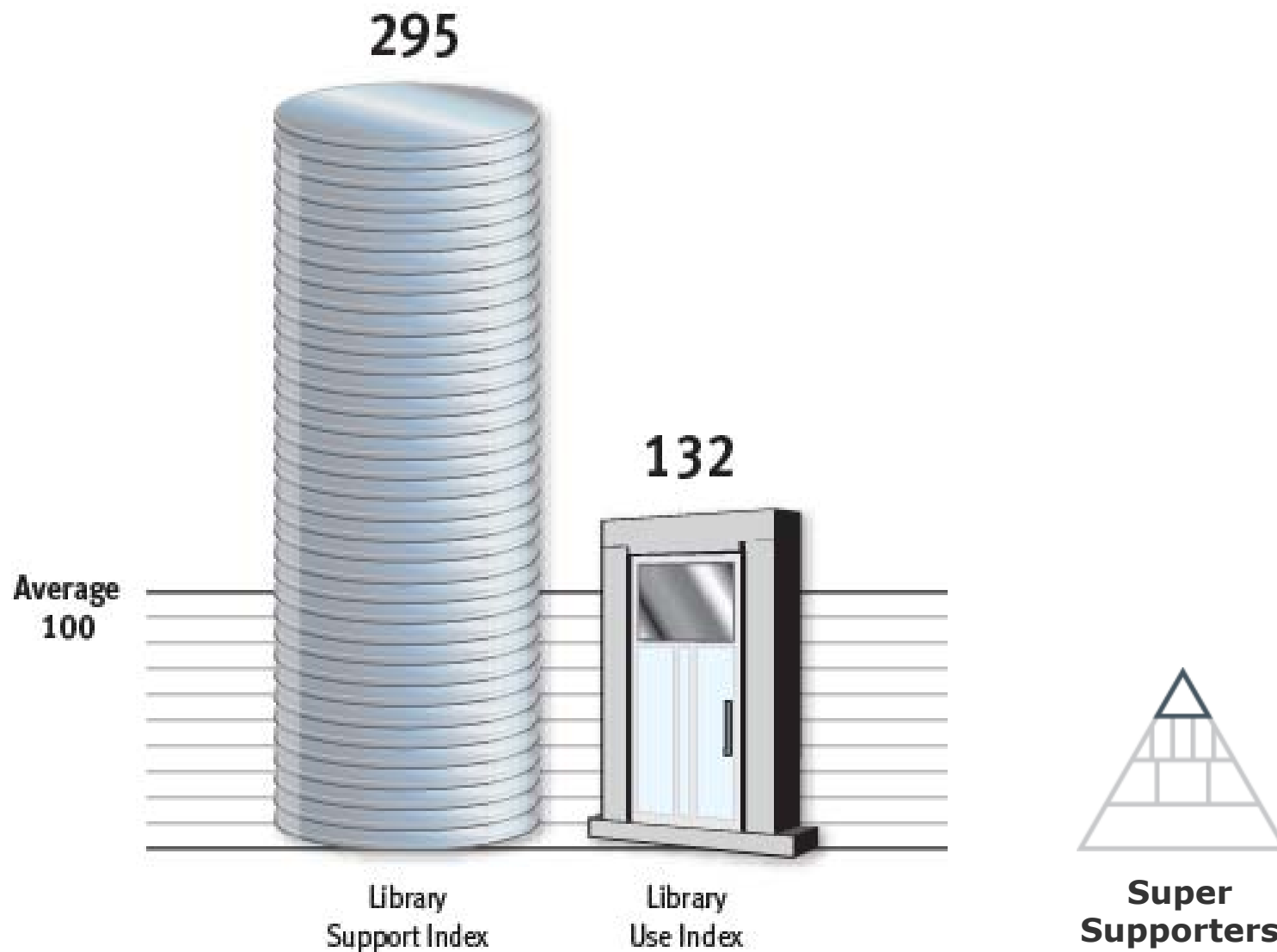


Financially Strapped

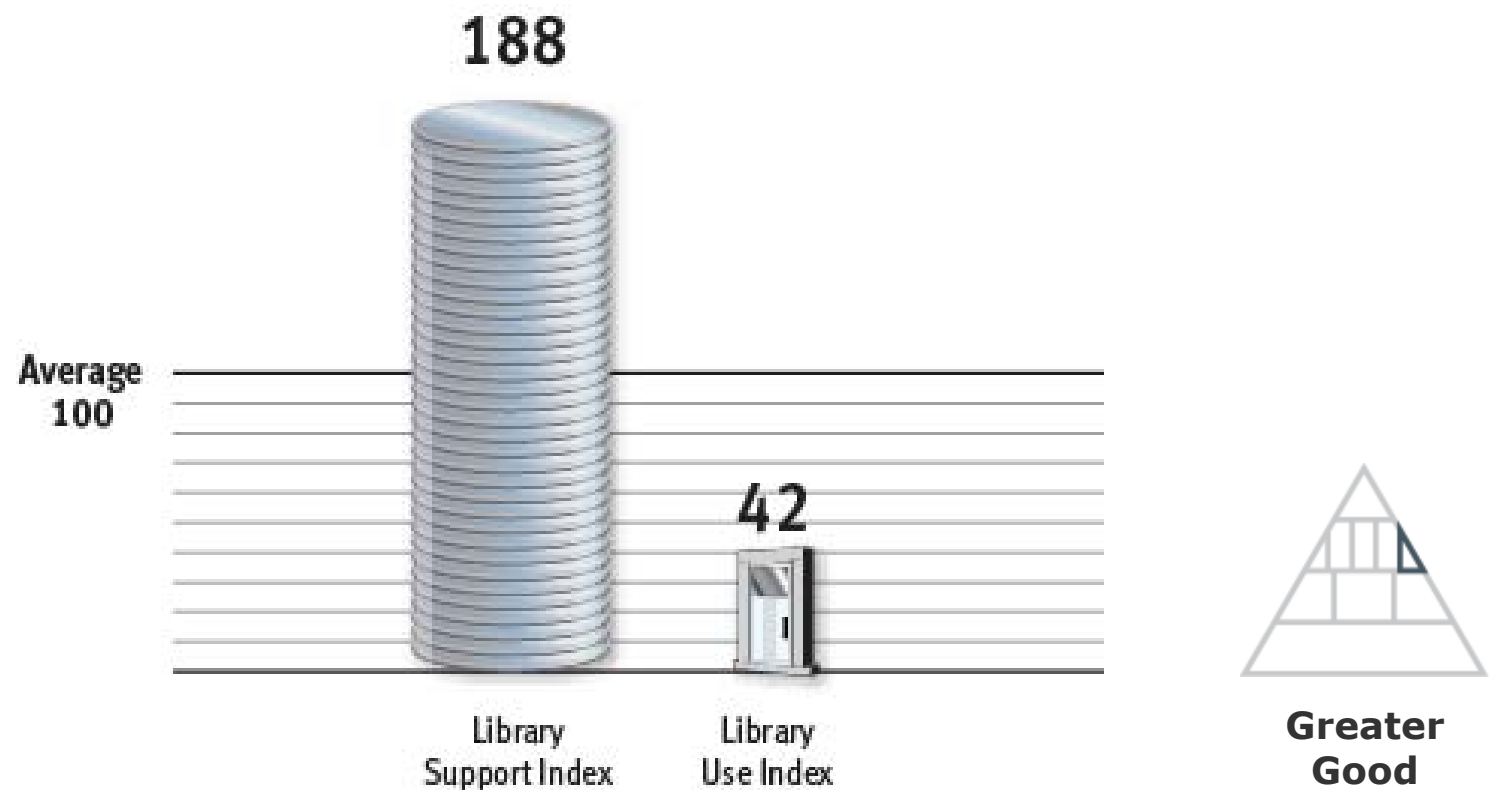


% People 18-69 / % Definite Library Supporters / Library Support Index

They account for, by far, the most support despite only somewhat higher usage



Despite the lowest visitation, they're the most likely Probable Supporters to be *definite* supporters



Eight overall findings

3. Library support is only marginally related to visitation

Library Funders = Library Funders

Eight overall findings

4. Perceptions of the librarian are highly related to support

Eight overall findings

4. Perceptions of the librarian are highly related to support

Do not underestimate (or underutilize) the power of the “passionate librarian”

Eight overall findings

5. The library occupies a very clear position in the realm of 'purposeful information' where it's very difficult to compete

Activities



- 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

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

Purpose

Transformation

Information

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 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

An oasis from hectic lifestyles
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
Like an old friend
The kind of thing you can really immerse yourself in and savor
Creates fond memories
Enables you to become a more creative person

STARBUCKS

READING A BIOGRAPHY OR N/F BOOK

NATL. GEOGRAPHIC

THE DISCOVERY CHANNEL

THE HISTORY CHANNEL

TIME MAGAZINE

WATCHING THE LOCAL TV NEWS

READING THE LOCAL NEWSPAPER

WATCHING A DOCUMENTARY

Looks at a subject or issue from many different perspectives
Brings the whole world into your home
Helps you gain a broader perspective on life
Helps you become an expert
An authority in its field
Allows you to get really in-depth on a topic

SEARCH ENGINES LIKE GOOGLE OR YAHOO!

BOOK STORE

ONLINE BOOKSTORES LIKE AMAZON.COM

TAKING A COMPUTER/TECHNOLOGY COURSE

PUBLIC LIBRARY

Provides instant access to information

ENCYCLOPEDIA BRITANNICA

Provides do-it-yourself information
Provides you with basic information
Puts information and answers right at your fingertips

ATTENDING CHURCH OR RELIGIOUS SERVICE

GETTING A COLLEGE DEGREE

CONDUCTING A JOB SEARCH

Makes you feel good about yourself
Allows you to pursue your passions and interests
Inspiration
Helps create who you are
You come away feeling like you really learned something
Part of a well-educated group of people
Fills you with hope and optimism
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
Helps you be self reliant
Serves a serious purpose

Purpose

Eight overall findings

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

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 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

Gives you something to talk about

MYSPACE.COM

Helps you express your individuality

Stimulates your curiosity about people, places and things

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

Helps you be the first one to know new things

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

NATL. GEOGRAPHIC

THE DISCOVERY CHANNEL

THE HISTORY CHANNEL TIME MAGAZINE

Looks at a subject or issue from many different perspectives

Brings the whole world into your home

Transformation

Allows you to appreciate the beauty in life

VISITING A MUSEUM OR ART GALLERY

Connects with people in a real human way

TAKING A CLASS FOR FUN

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

Makes you a deeper thinker

Helps create who you are

You come away feeling like you really learned something

Part of a well-educated group of people

Fills you with hope and optimism

Makes you feel safe and secure

Empowers you

Helps you become a better person

PUBLIC LIBRARY

ONLINE BOOKSTORES LIKE AMAZON.COM

TAKING A COMPUTER/TECHNOLOGY COURSE

WIKIPEDIA.COM

Provides you with basic information

Provides instant access to information

Provides do-it-yourself information

ENCYCLOPEDIA BRITANNICA

Puts information and answers right at your fingertips

Provides tools for very practical purposes

Helps you make informed decisions

Purpose

CONDUCTING A JOB SEARCH

Points you in the right direction

Serves a serious purpose

Enhances or rounds out your education

Helps you be self-reliant

Helps you seek truth

A source you trust

Something of great importance

ATTENDING CHURCH OR RELIGIOUS SERVICE

GETTING A COLLEGE DEGREE

Information



Eight overall findings

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

Library support is an "attitude"

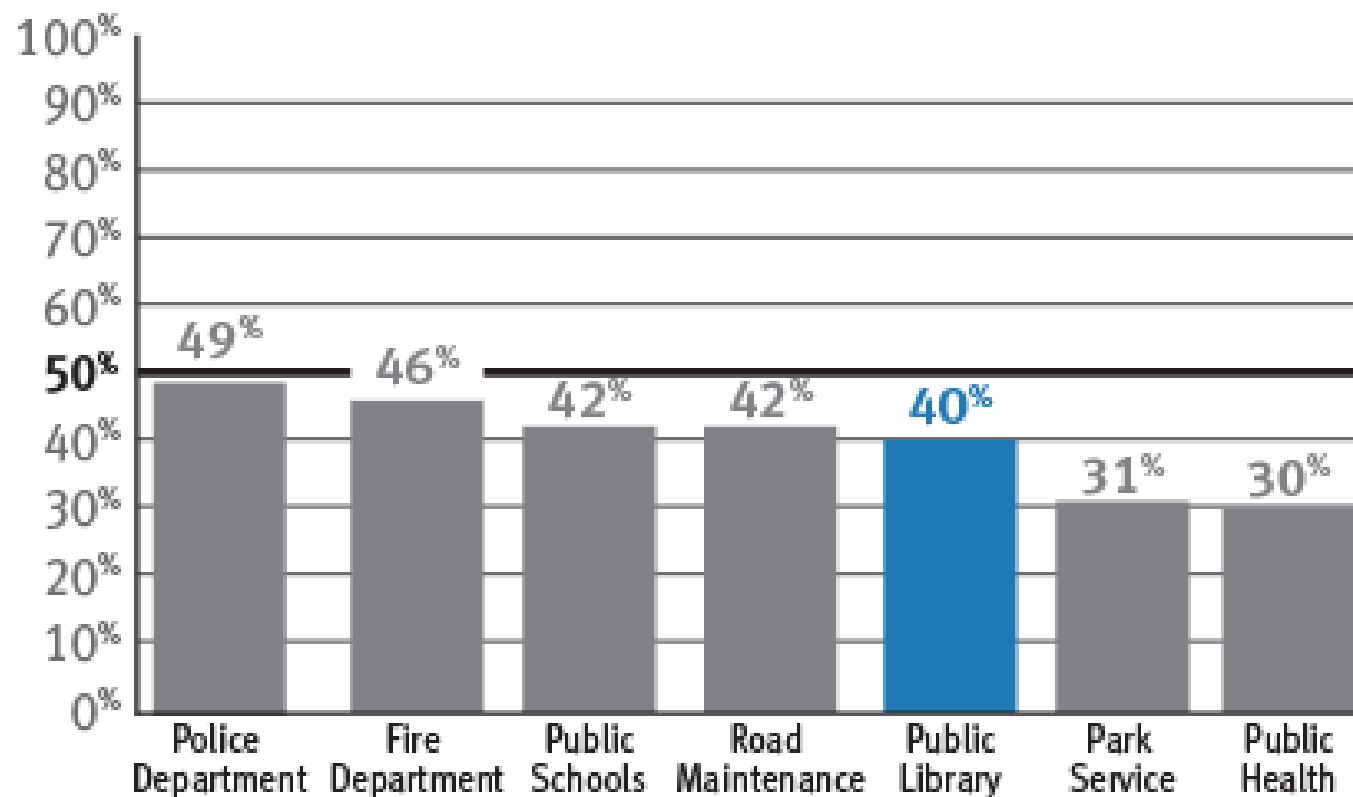
Eight overall findings

7. Elected officials are more connected to and supportive of the library than the public – and yet...

Elected officials

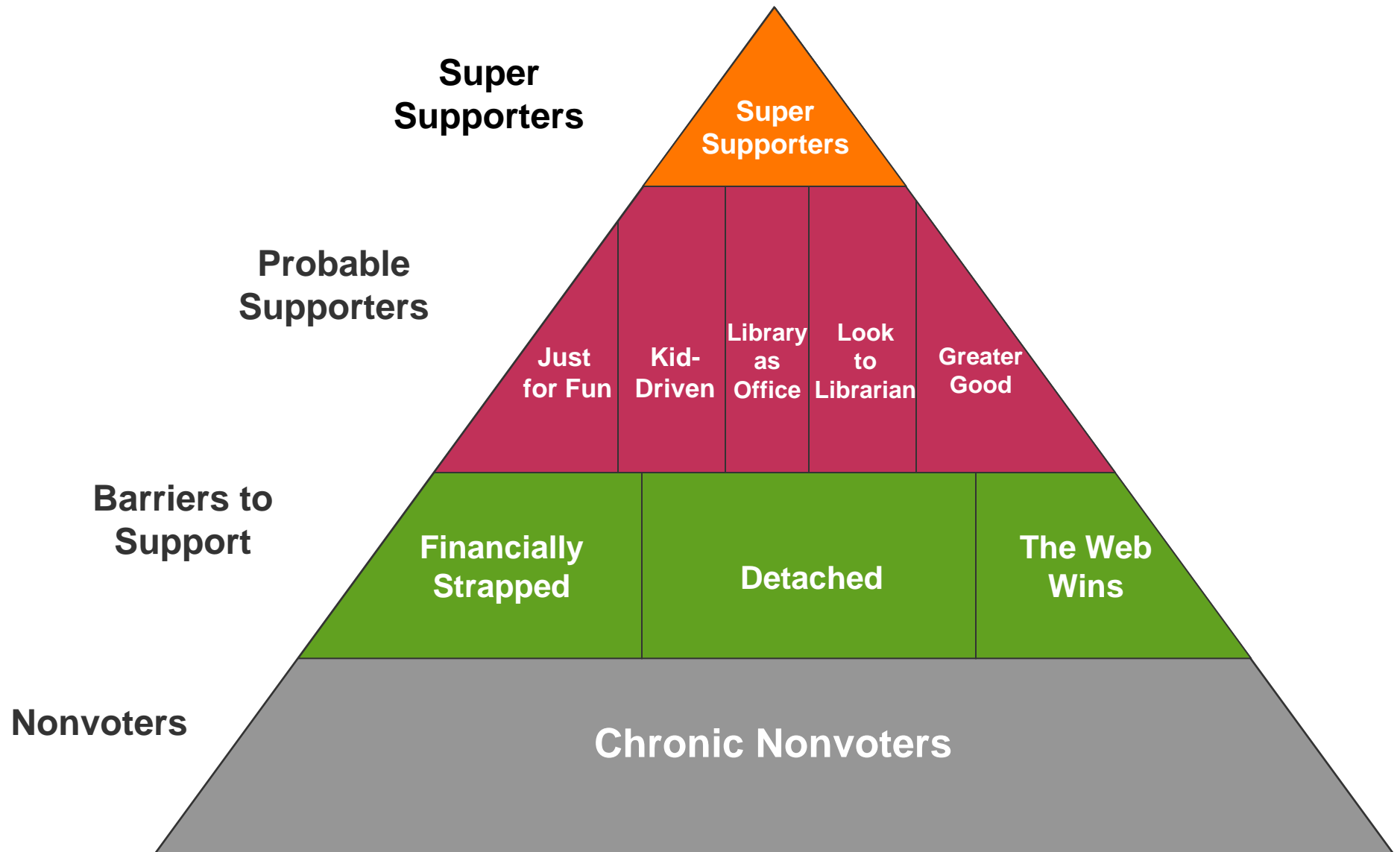
- The majority, **73%**, of elected officials believe the library has enough day-to-day operating money
- Therefore, the library is often not viewed as a top priority among the list of other local public services also in need of funding

Elected officials placed the library **5th** on the list of local services that need funding support

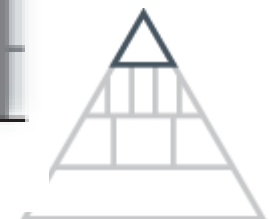
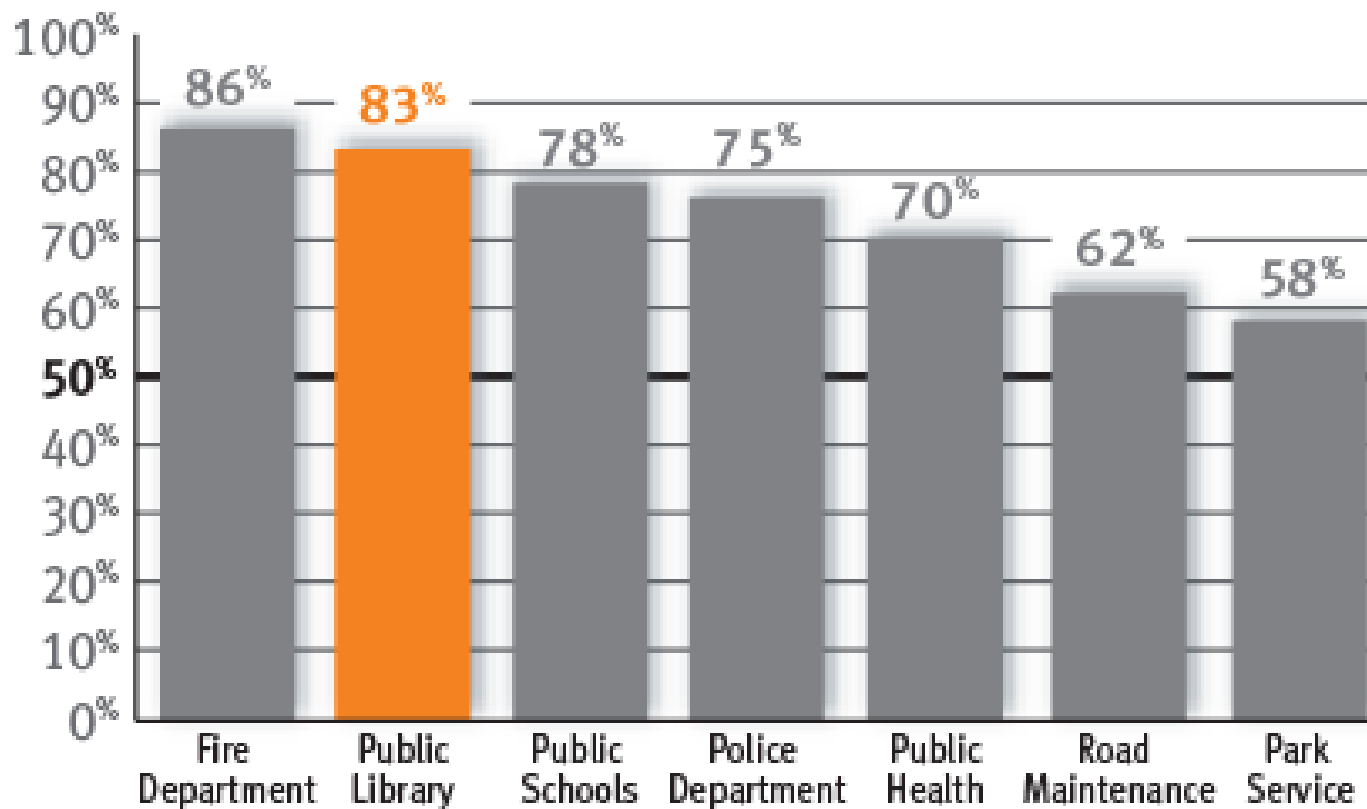


Eight overall findings

8. Increasing support for libraries may **not** mean a trade-off with financial support for other public services

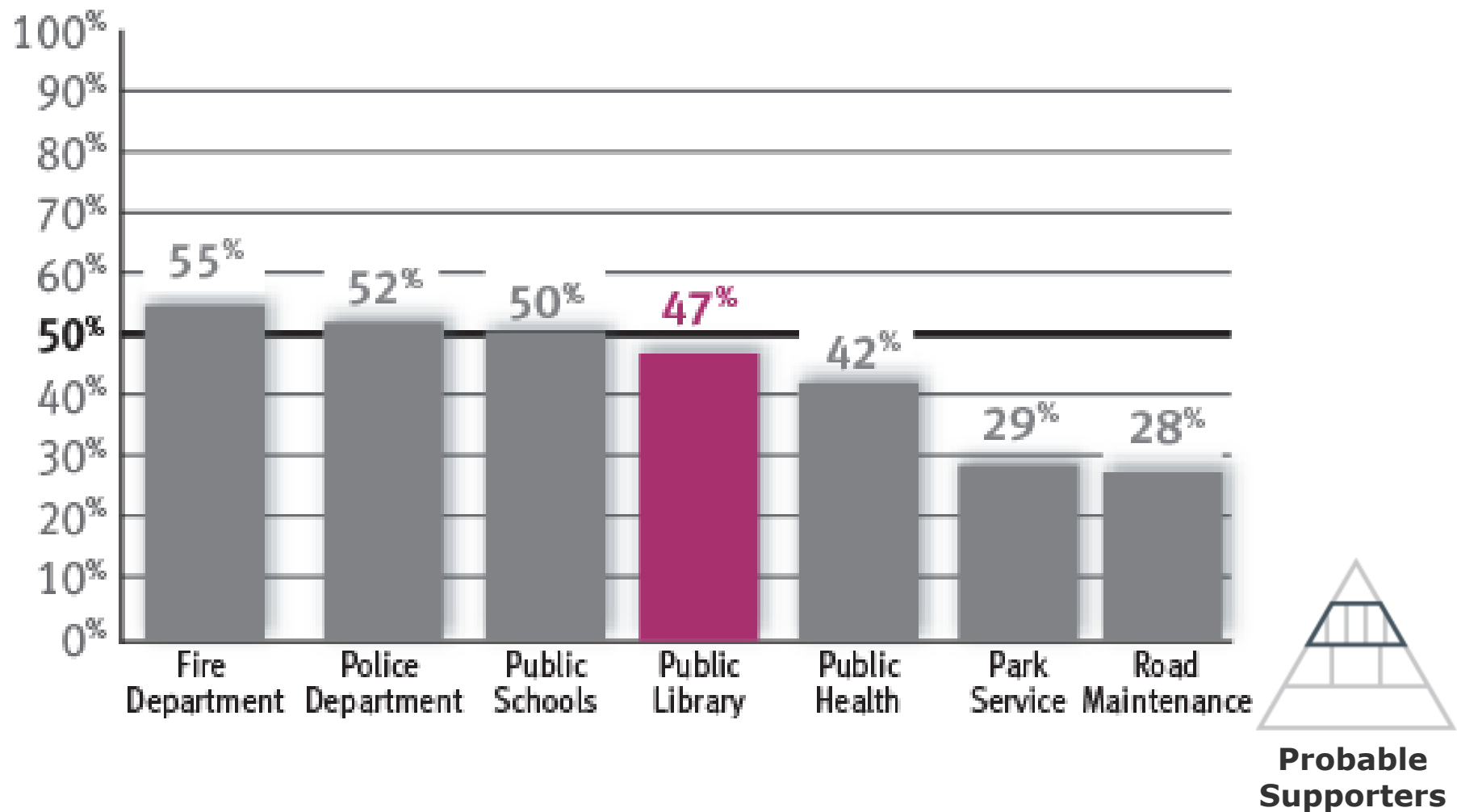


Among Super Supporters - library ranks 2nd on their list of services to support - Almost all services are supported

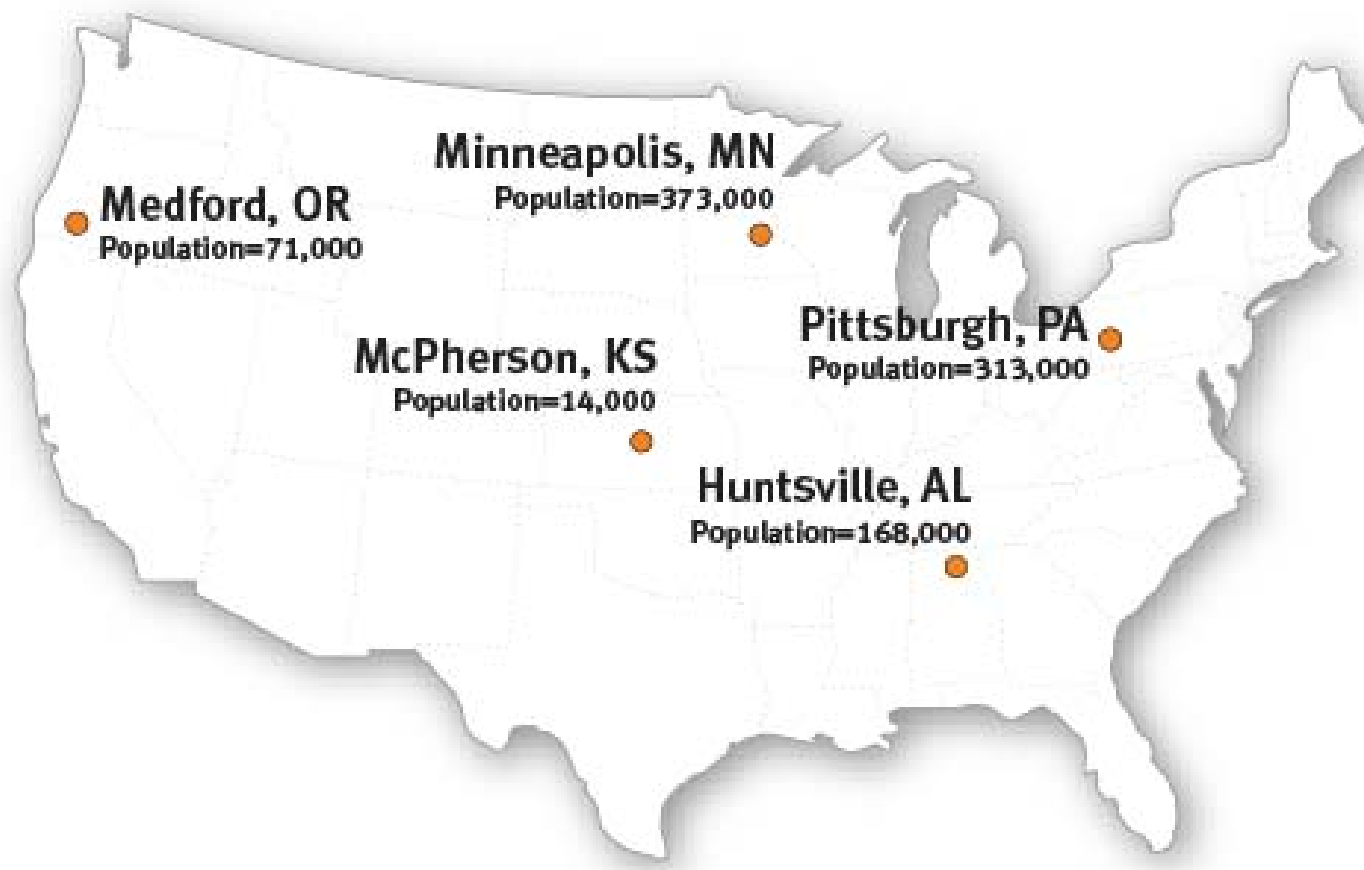


Super Supporters

Among Probable Supporters - many services are “equally” important for increased funding



Qualitative research



I don't think the library means the same to my children or grandchildren as it did to me.

My son goes on the Internet and gets all the information that he wants.

A library was a different time...a slower pace.

(Probable Supporter, Pittsburgh)

Our Opportunity

- 1. The research suggests that sufficient, but latent, support exists. Financial supporters of libraries are identifiable and can be moved to increase funding support**
- 2. Competition for the local purse is strong and intensifying**
- 3. The key to motivating funding support for libraries is to position the library as vital to a community's infrastructure and a source of transformation for individuals and the community**
- 4. Success will require scale, timing and endurance**

“Reframe” the library while laying out a case for taxes

Information



Transformation

Institution



Infrastructure

Nice to have



Necessity

Past



Future

Altruism for others



ROI for me

**Perceptions of the librarian are
highly related to support**

**Do not underestimate (or underutilize)
the power of the “passionate
librarian”**

Thank you Herb!!!!