Conclusion

From awareness ...

The public's awareness of libraries is based on yesterday.

The research provides important insights into what U.S. voters and their elected officials know, and what they don't know, about public libraries and public library funding.

Most U.S. residents are aware of the traditional 'informational' library services, such as books, newspapers, magazines and Internet access. Far fewer know about the many value-added and 'transformational' services provided by their libraries, such as teen programs, computer training and 'English as a second language' (ESL) classes.

But this is not news to many in the library community. Other surveys have reported similar findings. Libraries have responded by launching marketing efforts focused on increasing awareness of the library and its services. Yet, despite numerous marketing and communications efforts across the country, the perception of the library as 'a physical place offering traditional information services (books and information)' remains well-entrenched in the minds of library users. And while the perceptions of the library may remain fixed, the information landscape is anything but stable. The knowledge landscape is expanding rapidly and the library's once unique position as the 'place that provides books and information' is increasingly crowded. Powerful rivals with deeper pockets—think Google and Barnes & Noble—are able to mount far stronger marketing initiatives in pursuit of the information consumer, claiming more of their mindshare and redefining their expectations of information access. Without action, it is almost certain that the library's brand will continue to be seen as a legacy service, a 'nice to have' but not critical institution, more relevant in the past than for the future.

Residents are not aware that their public libraries are under financial stress.

The advocacy research also revealed that while the majority of residents have visited their public library, most are not aware of how the library facility or its services are funded. Most residents are not aware that their library is largely funded by local taxes—the same community purse that funds their schools, fire, police and public health services.

And of greatest concern, the advocacy research identified that residents are not aware that libraries are under financial stress. Most residents do not realize that libraries—maybe even their local library—have cut services, reduced hours or limited

new material acquisitions due to reductions in their operating budgets or increases in operating costs, such as healthcare, collections and utilities.

Residents are not aware that funding pressures will likely lead to further service trade-offs in the future. It was not until the topic of library financing was explicitly addressed in focus group discussions that residents voiced concerns or opinions about library funding. Even in situations where the focus group members had complained about the reduction in hours of their local libraries, they did not connect that inconvenience with a funding problem. In Medford, Oregon, where the library doors had closed due to a recently failed levy, focus group participants voiced a reluctance to increase taxes, believing that the money to reopen the libraries would come from 'somewhere.'

Elected officials are supportive and aware of the financial needs of the library. Those surveyed report that they are aware of the varied and important services offered by their libraries and recognize their importance to their communities. But the research also revealed that despite their appreciation for the library, local elected officials are not necessarily inclined to increase library funding. The majority felt that their libraries have sufficient operating funds.

So how do we close these perceptual and funding gaps? If, despite the efforts of existing marketing campaigns, the library brand is still about 'books and information,' how can the library be positioned as a 'transformational force' in the minds of more voters? If current library marketing campaigns are focused mainly on driving usage of libraries and awareness of their services, what is needed to increase awareness of the state of library funding to inspire, and activate, residents and local elected officials to increase funding for libraries?

This is not an easy task. Building awareness for any topic, brand or service in a world increasingly blanketed with marketing messages and sophisticated marketing techniques is not easy; nor is it inexpensive. And changing, or stretching, the perceptions of an established brand—a brand as universal in people's minds as the public library—is the most difficult of all marketing activities. But many organizations and brands have successfully increased awareness, revitalized their brands and increased revenues. The research suggests that public libraries can do the same—if they focus on the right target markets.

From awareness ... to funding

Today's support comes from those who believe libraries transform lives.

The research revealed an important distinction between the public library user and the public library funder. Not every library user is a library funder; not every library funder is a library user. A voter's willingness to support increased library funding is not driven, or limited, by library use. In fact, the advocacy research found that there is little correlation between frequency of library visits and willingness to increase funding for libraries.

Not all residents in a community are equal when marketing or advocating for increased funding for libraries.

Not all residents in a community are equal when marketing or advocating for increased funding for libraries. This inequality is not unexpected or unusual. In fact, understanding, accepting and leveraging the differences among different groups of consumers is the premise underpinning successful marketing and branding strategies. Understanding market segments and delivering the right value to the right target segment(s) is the top determinant of market success. As described by our market research partner, Leo Burnett:

"Not everyone is alike and different people want different things from the category. They 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 [funding] 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."

There are many ways to segment a market, including the library funding market. Unlike many research studies and surveys that assume a segmentation construct at the outset of market research (age, gender, income level, education level, etc.), no assumptions were made about which constructs could potentially drive the segmentation of the library funding market; but instead, the constructs were revealed through analysis of the research data. Utilizing the trademarked BrandProspect™ segmentation approach developed by Leo Burnett, the quantitative research data informed the construction of the Library Supporter Segmentation Pyramid.

Library funding support is an attitude, not a demographic.

A crucial and somewhat unexpected finding from the segmentation analysis was that demographics and lifestage were not important constructs in the library supporter segmentation. In fact, demographics are irrelevant to library funding support. The factors that determine residents' willingness to increase their taxes to support their local library are their perceptions and attitudes about the library and the librarian, not their age, gender, education level or household income. Library funding support is an attitude, not a demographic.

The Library Supporter Segmentation Pyramid identified four market tiers: residents who are not registered or do not typically vote in elections (Chronic Non Voters); voters with high barriers to supporting the library (Barriers to Support); voters who are probable library funding supporters (Probable Supporters); and voters who are definite library funding supporters (Super Supporters). Within these four market tiers are 10 distinct market segments, named to reflect their distinctive characteristics: 'Chronic Non Voters,' 'Financially Strapped,' the 'Detached,' 'The Web Wins,' 'Just for Fun,' 'Kid Driven,' 'Library as Office,' 'Look to Librarians,' 'Greater Good' and the 'Super Supporters.' Each of these segments can be profiled according to its unique attitudes and beliefs, as well as its willingness to increase taxes to fund the local library.

Two tiers of the pyramid provide the greatest opportunity for a campaign to increase library funding, the Probable Supporters and the Super Supporters. Together these target market tiers represent roughly 40% of U.S. residents ages 18–69 in communities of 200,000 or less. The market segmentation suggests that a library funding campaign should be targeted at less than half of residents in any community. And because the most likely library funders are not the most frequent library users, the target segments will exclude a large number of regular library users.

The research identified several important shared values and beliefs across the target market segments, the Probable Supporters and the Super Supporters:

• They are involved in their communities

• They recognize the library's importance to the community and to a child's education

• They are not always heavy users of the library, but believe the library is a noble place, important and relevant to the community

• They recognize the value of a 'passionate librarian' as a true advocate for lifelong learning

• They see the library as a vital community resource like public schools, fire and police, and are willing to increase their taxes to support the library.

For the target supporters, the library is not perceived as just a provider of practical answers and information; the most committed supporters hold the belief that the library is a transformational force.

These findings were reinforced during focus groups with Probable Supporters and Super Supporters. Field research in five U.S. communities explored the factors and messages most likely to drive, and to limit, increased funding support for libraries within the target segments.

Awakening and reinforcing the transformational value of the library is the most important factor in increasing library funding support. Several messages made a difference and several messages did not matter.

When Probable Supporters and Super Supporters were asked why they believe the library is a relevant and critical resource for their local community that deserved to be funded, these supporters did not talk about the books or about the information the library provides. They were not swayed to invest in the library because of its products, but rather by the role it plays in helping form the people they are today. Supporters do not believe that the library's value to the community is simply as a source of information, but rather as a 'window to the world' that allows them, and every resident in their community, to achieve their potential. Library funding supporters are not swayed by messages that detail library services delivered, but rather by messages that remind them of the library's impact on their community.

During lively discussions, several themes emerged that supporters felt could articulate the value of the library in ways that could convince them and others in their community to vote for an increase in taxes. Armed with these themes, the

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research team developed and tested a number of potential library support campaign concepts with Probable Supporters, Super Supporters and elected officials. Across all three groups, the most effective campaign concepts addressed the challenges communities face and the positive impact the library can have on alleviating those problems.

A successful library funding support campaign must:

- **Make the library relevant for the 21st century**
- **Instill a sense of urgency by putting the library in a competitive context for funding, alongside the public schools, fire department and police department**
- **Activate conversations about the library's importance in community infrastructure and its role in the community's future.**

As library funding faces increasing economic strains, Probable Supporters and Super Supporters must be reached, motivated and mobilized to support library funding.

The research suggests a large-scale library support campaign targeted at Probable Supporters and Super Supporters, with the right messages and programs, will increase support for the public library. But, of course, this will not happen without library community action. The love that even the most ardent supporters have for the library is latent; their awareness of the funding issues faced by libraries is minimal; and competition for the local community purse is likely to increase. As public libraries face increasing economic strains, Probable Supporters and Super Supporters must be reached, motivated and mobilized to support library funding.

To thrive tomorrow, libraries must translate belief to awareness, and awareness to action.

Next steps

So what are potential next steps?

While the research results are promising, additional field testing and learning are needed before a library support campaign can be constructed. By design, the research and the resulting library supporter segmentation are national in nature; the results therefore represent national averages. Likewise, while we know that Probable Supporters and Super Supporters represent roughly 40% of residents nationally, we do not know how those percentages might vary from community to community.

During the qualitative field research phase, the attitudes and perceptions expressed by Super Supporters and Probable Supporters were consistent from community to community. However, there were differences in the market conditions across the five research locations that could impact the efficacy of a large-scale campaign. From community to community, we found differences in library funding models (levy funding or allocations of a shared local government budget), economic conditions and population changes.

Local library market differences must be studied to determine how local or regional factors can be incorporated into a possible library support campaign. We are happy to report that a 'market-typing' research project is currently planned for summer 2008. This research is the first step in identifying a small number of test markets where a library support campaign could potentially be fielded and evaluated.

OCLC will continue the dialogue with the library community, the Bill & Melinda Gates Foundation and other possible library supporters to evaluate the potential for a library support campaign aimed at turning the tide on public library funding in America.