

A Long View— Looking Forward

Perceptions of the information consumer—2010

Economic swings do not always lead to permanent social change, but few environmental factors can create as swift a change in attitudes and practices as a severe or prolonged economic downturn. The Great Recession of the last decade has proven to be no exception. The recession had a profound impact on the actions, attitudes and values of the American information consumer, including a change in her use and perceived value of the library. Across every age group, library use increased. The perceived value of the library also increased. Library funding did not.

While the U.S. economy slowed, the pace of information technology seemed to accelerate. And with each new technology, the information consumer became more empowered. In the last five years, the Internet went from a tool for business to a social hub where we can all become friends—and share information. Social networks went from a concept to a way of life—first for the youth, now for all ages. And all the while, Google’s influence grew. Most information consumers started their information searches on a search engine. In the meantime, Google scanned two trillion words, or 11% of all published books. Information consumers embraced easy-to-digest information on Wikipedia—despite the warnings of educators and librarians. Apple flourished during The Great Recession as cell phones went from being mobile phones to mobile computers. Sending over 3,000 texts a month became average for teens.

Oh, what a difference five years make. And yet, much remains the same. Libraries are even more about books. Brands are hard to change, almost impossible for a brand as strong as libraries—in an environment where saving money on books is even more valued by

2010 Hot Spots

 **Libraries help users save money.** The top reason for increased library use in 2010 was to save money. Spending on books, CDs and DVDs decreased for 76% of those who experienced a negative job impact in the recession. The library filled the gap. A third of those who had a negative job impact used the library more, and 75% of them said they are now borrowing books, CDs and DVDs rather than purchasing.

 **Search engines are still hot.** Information consumers continue to begin information searches on search engines. 84% of information consumers began their searches on search engines. 3% begin on Wikipedia. Not a single U.S. respondent in 2010, including college students, began an information search on a library Web site, down from 1% in 2005.

 **The shine is off information resources.** Most resources, from search engines to online bookstores, are not as favorable to information consumers. Favorability ratings, while still strong, are down ten points since 2005. One exception—the favorability of library Web sites is flat.

 **Search engines and libraries are trustworthy.** Search engines are used not simply because they are fast and convenient, but because they provide worthwhile, credible and free information.

 **Social networking is for all ages.** It is no longer just a youth activity. Facebook surpassed Google as the most-visited site in March 2010. 52% of Boomers and 40% of seniors use social networking sites.

 **Staying connected is a priority.** Information consumers will pay for access to the Internet and mobile services—they will pay to stay connected.

 **Information consumers are confident.** They know how to find information. They will self-serve and are self-sufficient. Information consumers “just know” if information is trustworthy; they use experience and common sense as the judge. If the information found on a Web site is doubted, the information consumer will search for it on another site until satisfied.

 **Asking questions online grows.** Use of ask-an-expert services is up 186% from 2005 (15%) to 43% in 2010. Ask-an-expert services are used by all age groups.

 **Ask-a-librarian services have not taken off.** Five percent (5%) of information consumers used library answer services in 2005 and 7% in 2010. College student use remains low, at under 10%.

consumers. Existing brands get reinforced, not redefined, as new alternatives enter a market. Core value can be a point of strength, if recognized—and even a point of growth, if put into the new context.

Love for librarians remains. Like the library brand, it grew stronger. It seems that self-sufficient information consumers still appreciate expertise and a passion for learning—but they like it best on their time, with their tools. It’s cool to ask an expert—online. It was not cool to ask a librarian for help in 1950 (Public Library Inquiry, 1950); it’s still not cool.

Many more perceptions and attitudes have remained the same for the information consumer in the last five years. She still wants to self-serve and self-navigate the info sphere. She discovered the benefits of surfing the Internet by 2003 and, by 2010, was using more powerful tools. She is creating her own apps. She still knows good information when she sees it. She takes her information habits, and perceptions, with her as she ages. While she may be a bit less impressed with online information resources as they have become commonplace, nothing has yet replaced the value and speed of a search engine. And, her personal device connects her to a network where she can share the knowledge gained. She shares her info sphere with older information consumers but does not welcome information gates or gatekeepers.

Her advice for libraries: more hours, more content, more computers and of course—more books.

A Long View—into the next decade

The perceptions and beliefs of today's information consumer will shape the use, value and impact of libraries in 2011 and beyond. As libraries' budgets get tighter, expectations of the information consumer will only continue to expand. How can libraries balance the budget while balancing increased demand and new expectations? How will libraries fund the strategic investment that will be required to take the long view in difficult times? What library strategies, alternative services and advocacy activities will be required to best serve tomorrow's information consumer?

A few ideas for consideration:

Rethink online strategies—beyond the library Web site.

No information consumer started her information search on a library Web site in 2010. If the library Web site is not the first stop on the information search, but rather, one of several stops on an information consumer's search trail, or maybe not at all, what must be done to increase the touch points and invitations for the information consumer to use library resources? What has Wikipedia figured out about ease of access, language and links that library Web strategies are missing?

Sixty-eight percent (68%) of Americans have library cards. Why do only 33% of Americans use the library Web site? Rethinking online strategies with users and staff with the specific goal of serving all current cardholders could create some interesting ideas, new approaches and potential new partnerships.

The library is, in so many ways, the doorway to the communities and campuses it supports. How do the library Web site and online strategy celebrate and support community initiatives, as well as library initiatives? Do the current online strategies support the important campus and community programs as well as the libraries' offline strategies? What new online services or partnerships could better integrate online and community programs?

2010 Hot Spots

 **“Books” as the library brand grew even stronger.** The information consumer believes that the library brand was “books” in 2005. Even more believe it is “books” in 2010. 69% said “books” was the library brand in 2005, while 75% said “books” in 2010.

 **The most important role the library plays is consistent for all ages except for the youngest library users.** For ages 18 to 65+, the top value of the library “to me” is a place to get books, videos and music. Making information freely available is number two. For those ages 14–17, what's most important “to me” about the library is a place to read, while a place to get books, videos and music is second. College students indicate that the most important personal role for the library is also a place to get books, videos and music.

 **The top piece of advice for libraries in 2005 was to “add more content.”** The top piece of advice to libraries in 2010 is “be open.” So, Americans are saying, “Please add more hours—then add more content.”

 **Fewer seek research help.** Seeking research assistance at the library fell from 39% in 2005 to 28% in 2010. Print material declined as a source for validating information: 68% in 2005 to 51% in 2010.

 **The online library has not become a substitute for visiting the library in person.** While use of the physical library saw strong growth in 2010, the library Web site is not attracting significantly more users. Penetration is basically flat from 2005 at under 35%. The top reason for not using the library Web site remains the same as in 2005: “I didn't know it existed.” The top reason given by college students: “Other sites have better information.”

 **17% of users say that their library advertises its services.**

 **The library's perceived value for the community increased for 31% of Americans—** and even more for those who experienced a negative job impact (40%).

 **Librarians are valued.** They're even more valued than in 2005. In 2005, 76% of information consumers who have been assisted by a librarian thought librarians add value to the search process; in 2010, this grew to 83%. The value for Americans who experienced a negative job impact was even greater—at 88%.

Embrace the brand. Extend the experience. Connect the dots.

Libraries = BOOKS. And in today's economic context, libraries also equal free books and real economic value. The number-one reason for increased library use is to save money—on books, DVDs and music.

While users increased their use of library materials, they are also discovering the many other services that libraries have to offer. These services have economic value, too. There are new opportunities to connect the dots between books and the other valuable services that the library provides that were not as readily apparent to users before the recession.

Libraries have an opportunity to create invitations to experience what comes with free book services—free job search help, free tutoring, free computer skills training, free e-books, free digital storage, etc. Existing brands get reinforced, not redefined, as new alternatives enter a market. Core value and core values are a point of strength if put into the new context of the day. Today's context is economics.

“Books” is our brand. E-books are books.

The information consumer will have every expectation that their place for books, the library, will also be their place for e-books. Existing brands get reinforced. As e-books continue to increase in use and popularity, libraries have a new opportunity to reinforce the value of the book—both the “p” and the “e” book—not either/or.

Amazon, Google and other electronic book providers will likely set the expectation for e-books—not the library. Strategies on e-book delivery and partnerships are an essential part of the long view strategy for libraries.

Not only are books being redefined, so is reading. Seventy-three percent (73%) of Americans consider themselves to be readers. It may well be the redefinition of reading, not merely the redefinition of the book, that will have the most significant impact on the role of

the library. How would a new or expanded definition of the reader help inform our approach to both online and offline library services? What will summer reading programs look like in five years? What will literacy programs look like in 2015?

Advertise, please!

“The library needs to advertise its services more.” This encouragement was echoed many times in the verbatim comments in the survey. Just 17% of information consumers have seen an advertisement from their library, and just 11% of college students. Those who were aware of library advertising noted that signs, flyers and promotions inside the library were the most-used methods of advertising. We know that this is not where the information consumer is looking for information.

No need to advertise books—these are well-understood—but maybe advertising is needed to promote e-books or expanded library hours.

Expand library hours online.

Use is up at the library. Use is flat on library Web site. For many libraries struggling with budget cuts, reducing physical library hours and reducing staff are difficult realities. An opportunity and a need exist to support the growing demand for library services via the online library. Our study suggests that this will not happen naturally—we have seen little movement in the last five years. This important shift will come only with more promotion and expanded access to online library services—delivered both on and off the library Web site.

While our survey found that nearly a quarter of Americans see an increased value of their library, others expressed concern that the library value had decreased for them, due to shorter hours and closed branches. Some expressed that they can no longer make the trip to a library. While the virtual library will not replace the physical services, new strategies are required to balance the budget, so we need new approaches to “library hours.”

2010 Advice to Libraries

“ Be more vocal to the community about what you have to offer.”

24-YEAR-OLD ECONOMICALLY IMPACTED

“ Better hours however with the economy I am thankful that you are there at all”

73-YEAR-OLD ECONOMICALLY IMPACTED

“ advertising could be helpful people may have forgotten about the resources there”

17-YEAR-OLD

“ go online and make public aware of it.”

73-YEAR-OLD

“ Have a better website to surf materials and either view or reserve materials online.”

23-YEAR-OLD

“ We need you. Don’t let them take away your funding. Fight for your existence and expansion as you are now more important than ever as a foundation for the community.”

50-YEAR-OLD

“ Secure more funding for updated books computers internet access community needs etc!”

46-YEAR-OLD COLLEGE UNDERGRADUATE

“ Become a center for community activities”

45-YEAR-OLD

“ Be open more hours to serve the public”

68-YEAR-OLD ECONOMICALLY IMPACTED

“ Make it easier to get a library card.”

18-YEAR-OLD

Personal information trainers

The information consumer knows good information when she sees it. She uses common sense and personal knowledge. This self-reliance to determine data quality was well established by 2005; it has been reinforced through practice.

In our 2010 survey, we asked users to share their views across a wide range of information types. Did the information consumer have a different view of information quality based on type of information? The short answer is “no.” From healthcare to recreational materials, self-help, career and financial information, the information consumer had the same view—search engines are favorable compared to libraries.

If information consumers are confident about search engines, what are the best strategies to support and improve, not discourage, this self-service, self-assessment model of information literacy? A metaphor might be: how can we serve our users as personal information trainers rather than information literacy instructors? How do we help the information consumer maximize the value of search engines and other self-service models—at the point of need?

Seize the moment (to talk about future money).

As sage financial advisors will remind us, it is best to sell stock when the price (value) is high. The value of libraries is high—31% of Americans see increased value for their community, and that number is even higher (40%) for Americans who have experienced a negative job impact. Let’s heed the advice and “sell” our value. A strategic priority must be to encourage our users, our students and our colleagues to tell their stories—again and again, online and in person. Let’s build programs to make today’s perceptions fuel tomorrow’s budgets.

The third place—online.

The infosphere is social. Two-thirds of online Americans use social networking. Physical libraries are social spaces and social places. Online libraries are not. The idea of the library as the “third place” was a topic of much conversation in 2003. The idea was that Americans were looking for a place, a third place, that was not home and not work, but instead a neutral place to reflect, connect and become inspired.

What could the online “third place” look like? What services and inspiration could an online third space deliver? While many libraries now have established and modestly active Facebook and other social network programs, this must be viewed as just a first step, just one possible connection. The concept of the library as the online third place has not been “socialized” across the community. What might this mean for libraries individually? For libraries collectively? The library social network—what might be possible?

Learn from our newest library information consumers.

Twenty percent (20%) of Americans have experienced a negative job impact. A third of American families have been impacted. The survey uncovered that millions of Americans who have been impacted by the economy are using and valuing the library at an increased rate.

Twice as many Americans who have had a negative job impact are using the library daily than those who are not impacted; 50% more go weekly and 33% more go to the library monthly. While at the library, they are discovering and using many new library services for the first time. Eighty-one percent (81%) hold a library card, compared to 68% of nonimpacted Americans.

Forty percent (40%) of Americans who have been impacted by the recession see an increase in the value of the library to themselves—more than double of those not impacted. Forty percent (40%) also perceive an increased value to their community.

2010 Advice to Libraries

“ Please hang in there the community needs you.”

70-YEAR-OLD

“ Keep helping all that come through your doors.”

71-YEAR-OLD

“ Keep reminding the politicians of the importance of the library to the community and the need to maintain/increase services”

59-YEAR-OLD

“ continue caring about the community’s needs”

21-YEAR-OLD COLLEGE UNDERGRADUATE

“ get new stuff and stay open longer”

20-YEAR-OLD ECONOMICALLY IMPACTED

“ I would provide my primary library with this one piece of advise: If they continue to serve people irregardless of their financial status they will flourish.”

18-YEAR-OLD ECONOMICALLY IMPACTED

“ get with the e-book trend”

18-YEAR-OLD

“ Make your services more known to the community.”

24-YEAR-OLD ECONOMICALLY IMPACTED

“ Go completely digital.”

20-YEAR-OLD COLLEGE UNDERGRADUATE

“ Keep up with current technologies.”

39-YEAR-OLD ECONOMICALLY IMPACTED

For many Americans, the library experience is new or renewed. This creates a great opportunity for libraries to discover more about what is needed, what is valued and what more can be provided to a new set of users who are looking to the library as a valued community asset.

Be there.

These are indeed challenging economic times for libraries, and they are challenging economic times for library users. These times demand new experiments and new approaches as many of the traditional options are simply no longer possible—or no longer what the information consumer demands. The suggestions above are just a few of the many possible ideas that surfaced as we studied what we learned about the perceptions and habits of the 2010 information consumer. We look forward to the opportunity to explore these and many other ideas as we work together to take the long view for libraries.

The information consumer is counting on libraries to “take the long view.” This was clear in the survey. The top requests for libraries in our 2010 survey: “extend hours” and “add to your collections.” The challenge is to leverage the library strengths, build on the core and the brand, and to seize the moment to tell the powerful stories about the vital role of the library. As an 18-year-old information consumer told it, “[The library] is a hotspot for information and we live in an age of information so it’s the place to be.” Or as a 77-year old information consumer summed it up, “Always be there.”



“[The library] is a hotspot for information and we live in an age of information so it’s the place to be.”

18-YEAR-OLD COLLEGE UNDERGRADUATE