A Long View— In Internet Time

Eight years ago, my colleagues and I began work on our first OCLC membership report, *The 2003 OCLC Environmental Scan: Pattern Recognition*. Our aim was to learn about the attitudes and habits of the emerging "online information consumer." We explored three themes that described the information environment of the early Internet: self-service (moving to self-sufficiency), satisfaction and seamlessness. While that work barely scratched the surface of what we needed to explore, it set into motion community discussion and a series of OCLC studies aimed at learning more about the increasingly confident, empowered "information consumer."

Now we are releasing our fifth membership report, chronicling the online practices and perceptions of the 2010 information consumer. Previous OCLC membership reports include: *Perceptions of Libraries and Information Resources* in 2005; its companion report, *College Students' Perceptions of Libraries and Information Resources* in 2006; *Sharing, Privacy and Trust in Our Networked World* in 2007; *From Awareness to Funding: A study of library funding in America* in 2008; and today, *Perceptions of Libraries, 2010: Context and Community*.

While each study had a unique theme as we researched the hot topics of the time, the reports share a common goal—to provide a future frame for libraries by studying the perceptions, not just the practices, of the information consumer. Understanding beliefs over behaviors has been our primary research objective. If it is true that perception is reality or, maybe more accurately, perception predicts tomorrow's reality, then our goal has been to provide hard data about the current perceptions of the library, Internet and information, and the ties among the three. We have explored the physical library, the online library, search engines, searching,

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Internet privacy, trust, social networking, library funding and the concept of "library value." We have pushed hard to understand more about the information consumer's perception of the library brand.

We have assembled a rich set of information about the 21st century American information consumer. To our knowledge, it is the only data set collected about the Internet-era library user that documents his uses and perceptions of the library and online information. Some might argue that it is too early to have any sort of "long view" of the Internet information consumer. I would suggest that in Internet years, eight years is an information generation. But whether it is simply an eight-year view or indeed a preview to permanent change, important trends, shifting perceptions and new hot spots have emerged that we believe will shape the future landscape for libraries.

For libraries, this long view presents challenges—and opportunities.

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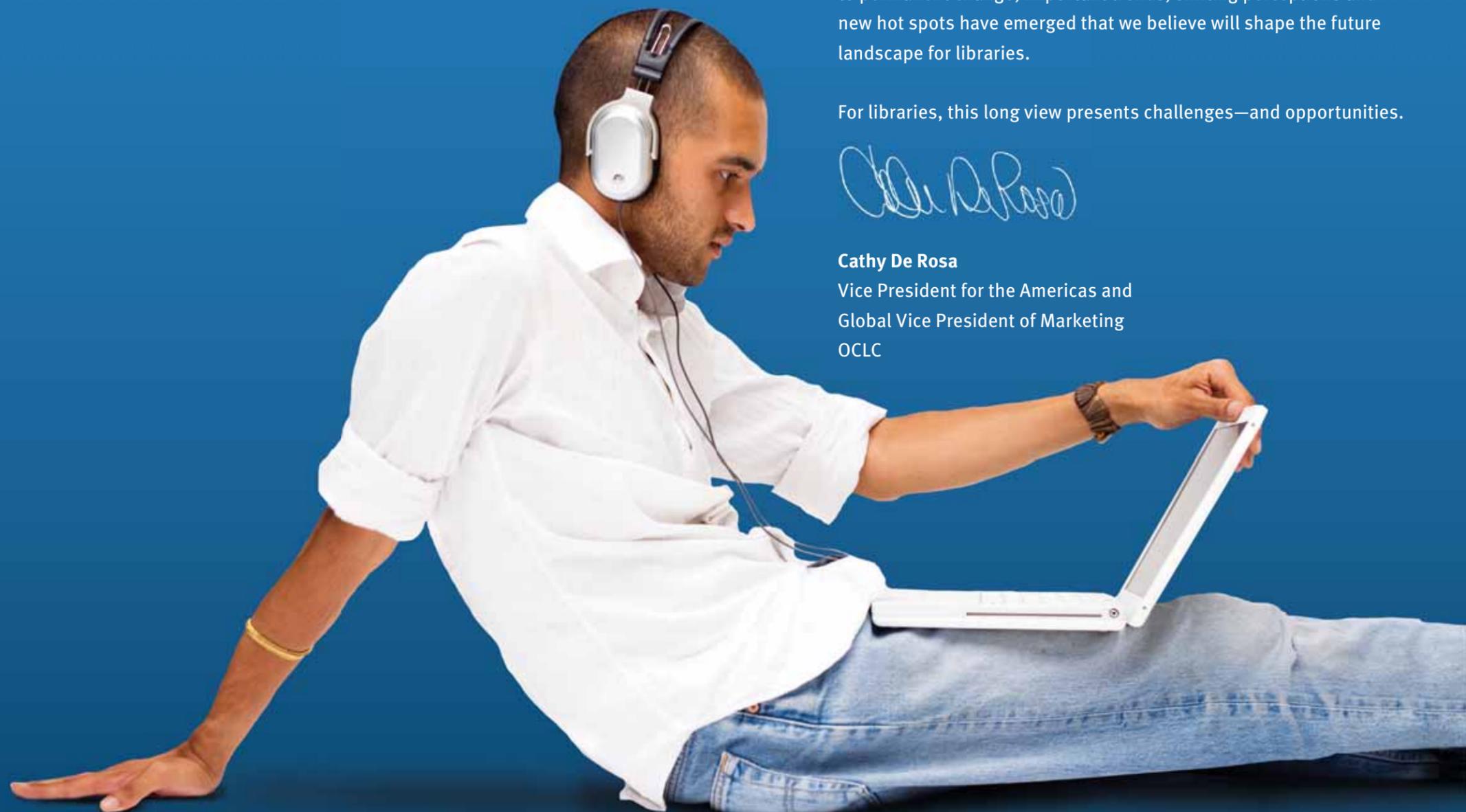
Information Consumers: 2003–2010

Before we move into what surfaced in our 2010 work, a brief summary of our earlier studies and a few thoughts about economic context are useful.

2003

We met the information consumer as he was beginning to experience the power of the Internet. He may have been buying a book on Amazon, Web "surfing" or e-mailing on Yahoo! Most information consumers had been online only for a few years, except for those under age 25 and librarians who had more experience.

The credibility of information resulting from search engines was a hot debate in the library community. The information consumer was not at all concerned. Fourteen million U.S. consumers made an online purchase in 2002, totaling $1.3 billion. Sixty-five percent (65%) of college students reported that they played video, computer or online games.

In September 2003, Google turned five years old. Google Answers was launched. Blogs and wikis were the newest collaboration technologies. Gartner Group predicted that corporate blogs were five to ten years into the future.

2005

The majority of online information consumers (82%) began their searches for information on a search engine, a source they found roughly as trustworthy as a library. One percent (1%) began their searches on a library Web site.

The information consumer loved search engines, with a favorability rating over 85%. They also loved librarians, with 76% of those assisted by a librarian indicating the librarian adds value to the search process. The information consumer was very confident of his information searching skills. If in doubt of the results, he just checked another Web site.

2003 Hot Spots

🔥 **34% of Internet users were seniors, age 65+.**

🔥 **Library e-content purchases were just taking off.** 2% of U.S. library funding was spent on e-content and electronic subscriptions.

🔥 **Search engine results were being debated.** 78% of Outsell survey respondents said the Web was providing "most of what they needed."

🔥 **Google turned five years old.** It answered search requests in 88 languages—200 million of them per day.

🔥 **College students were using the Internet.** 73% of college students said they use the Internet more than the library.

🔥 **Online purchases were taking off.** Almost half of the U.S. population purchased books online.

Source: OCLC, 2003

2005 Hot Spots

🔥 **Libraries played many community roles.** Americans felt libraries were a place to learn (83%) and offered free computer and Internet access (75%).

🔥 **Information searches began on search engines.** The majority of Americans were satisfied with their most recent search experience on a search engine (91%).

🔥 **Search engines were a favorite.** More than half of Americans (54%) felt search engines were a perfect fit for their lifestyles. 18% felt the same about libraries.

🔥 **"Books"—the library brand.** 69% said books were the first thing to come to mind when thinking of a library.

🔥 **Information consumers self-served—both on the Internet and at the library.** 65% had never requested assistance at a library.

🔥 **Libraries were popular.** Most Americans (80%) had a favorable opinion of the library as a source for information.

Source: OCLC, 2005

The top method for learning about a new electronic information resource was from a friend (58%), with links from another Web resource (55%) second. The information consumer was not willing to pay for information, but he was getting very comfortable with making online purchases.

Ninety-six percent (96%) of online information consumers had visited a library at sometime in the past, with 1% visiting the day before they took the survey. Seventy-five percent (75%) of American information consumers had a library card. They predicted that their use of the library would remain steady over the next three to five years—and our 2010 results indicate that their predictions were correct.

Each year from 2003 to 2007, the U.S. economy grew. The positive effects of economic growth were everywhere, it seemed, except at the public library.

In 2005, over a third of U.S. public libraries reported declining budgets. Library levies were struggling. Seventy-five percent (75%) of library operating levies passed in the mid-1990s; by 2005, the pass rate for operating levies had slipped to under 60%. It seemed the library "value" was less clear to voters in the strong economic Internet world. The library was certainly a nice institution to have, but library directors frequently fielded questions from community leaders and elected officials about the future role of the library "when we have Google." U.S. university library budgets remained stable.

2007

The term social networking had been coined. Thirty-seven percent (37%) of online information consumers were using social networks. MySpace led the social networking sites with 75% market share; next were Classmates.com and Facebook at 31% each. College students were connecting on their own social site, Facebook, which had just opened beyond the college student audience. Less than 10% of information consumers thought it was the library's role to build a social site, and librarians agreed.

While futurists were predicting security breaches and privacy erosion, the information consumer was not worried. He was not afraid to share information—with friends, new online friends, libraries or commercial organizations. The information consumer, not commercial organizations or libraries, was defining what should be private.

Search engine penetration among information consumers approached saturation, with 86% using search engines, up from 71% in 2005. Yahoo! was the top global Web site. Amazon was the top commercial Web site in the U.S. Ninety-two percent (92%) of librarians used Amazon; 21% used it daily. Google was the most-used search engine. YouTube was the fastest growing Web site, followed by Facebook.

About sixty percent (59%) of information consumers had used instant messaging, and 20% of information consumers had created a Web page. The number-one reason for creating a Web page was to communicate with family and friends. Cell phone ringtones were hot, a $550 million dollar business (BMI, March 2008).

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2010

The U.S. economic boom was replaced by what has been called "The Great Recession" (*New York Times*, March 2009). In January 2010 when we conducted the most recent study, the U.S. unemployment rate topped 9.8% (U.S. Bureau of Labor Statistics, February 2010). It remains at over 9% in January 2011. The number of Americans who had experienced a negative job impact (lost a job, had to take a job at a lower salary, worked a second job, etc.) during the recession was even larger. Our research shows that the number is double the unemployment rate, at 20%. A third of American families had at least one family member who experienced a negative job impact during the recession.

2007 Hot Spots

🔥 **Social networking was growing.** 41% of Americans were extremely or very familiar with social networking sites.

🔥 **Online privacy was debated,** although more than half of social media users (55%) had shared photos on a social media site.

🔥 **Most online Americans (91%) had used the Internet for over four years.**

🔥 **Cell phone use was up.** 41% of American cell phone users were texting and 20% had downloaded ringtones.

🔥 **Social networking sites were used frequently.** Three-fourths of users logged on to social networking sites weekly.

🔥 **Amazon was the top commercial Web site.** 76% of Americans indicated they shopped online.

🔥 **Social media was gaining popularity.** YouTube was the most-used social media site for all ages and had 188 million visitors in June 2007.

🔥 **College students were social.** 57% used social networking sites.

Source: OCLC, 2007

2010 Hot Spots

🔥 **The Great Recession impacted the U.S.** The unemployment rate topped 9.8%. Even more Americans—20%—had experienced a negative job impact.

🔥 **Mobile phones increase in popularity.** 23% of U.S. mobile phones are smartphones providing Internet access.

🔥 **All ages are connected.** Over 90% of Boomers use e-mail and search engines. Over 50% use a social networking site.

🔥 **81% of economically impacted Americans have library cards.** They also perceive increased value in the library, for both themselves and their communities.

🔥 **Positive librarian perceptions impact library funding.** The value of the librarian grew even stronger in 2010. This is good for funding. A high correlation exists between funding support for public libraries and positive librarian perceptions. (Source: OCLC, 2008.)

While the economy was declining, the online activities of the information consumer were increasing. Seventy-seven percent (77%) of Americans were online, up 12% from 2005 (Internet World Stats, September 2010). comScore reported that a quarter of U.S. mobile phones are now smartphones that provide Internet access, a growth of 1,050% from 2005. Many of the online practices of young information consumers in 2005 were across all ages in 2010. Over 90% of Boomers used e-mail and search engines, and over 50% used a social networking site.

In 2010, 68% of information consumers had a library card. For those Americans economically impacted, that rate was even higher—81%. Information consumers who have experienced a job impact were not just getting library cards at greater rates; they were using the library for more services and more often in 2010. And their perception of library value was significantly different from those not impacted—their perceived value was higher.

Today and beyond

Perceptions of Libraries, 2010: Context and Community reports the changes and evolutions in the information consumer's life in the last five years, with particular attention given to the actions, attitudes and perceptions observed in 2005. We know from other research that The Great Recession has reshaped attitudes and practices in many lifestyle areas, and we wanted to better understand the impact on the information consumer's use of online information and the library. We studied the differences and similarities between information consumers who had experienced a negative job impact in the recession and those who did not. And as the "digital age divide" becomes less distinct, we turned our attention to better understanding if the attitudes of the 2010 information consumer were now ageless or if age differences still played a distinct role in how we perceive and use information—and libraries.