

Conclusion

Perceptions of Libraries and Information Resources: A Report to the OCLC Membership is intended to provide OCLC staff, the OCLC membership and the information community-at-large data on the perceptions and practices of the information consumer and how libraries are positioned in the infosphere they use.

This report is the result of a need to better understand the interests, habits and behaviors of people using libraries in a time of information abundance. We concluded *The 2003 OCLC Environmental Scan* by suggesting—based on the patterns and trends we identified and highlighted—that the place libraries hold today is no longer as distinct as it once was.

Libraries, many of their resources and services, and the information experts who work in libraries appeared to be increasingly less visible to today’s information consumer. But we could not say with any certainty how extensive or how permanent this apparent shift had become, for, as we noted in the introduction to this report, there are no recent, large-scale use studies to draw on.

We have compiled a database of over 270,000 information consumer views, habits and recommendations from over 3,300 people in six countries. The database contains over 20,000 verbatim views about the library, Internet resources, library services and the “Library” brand. We have not identified and analyzed all aspects of the data for this report—this research data will be a source for ongoing exploration—but we have discovered much more about the practices and perceptions of these information consumers. A summary of the findings and a few conclusions and observations follow.

*My library of the future,
will use technology,
to allow great books that are locked away
to be seen by you and me.*

*The great libraries of Alexandria,
and the monasteries of Rome,
will reveal hidden treasures
in the comfort of your home.*

*For each book will be scanned,
electronically of course,
and a hologram created,
it’s the new modern force!*

From *My Vision*,
a poem by “Kirstie,”
a Weatherhead (U.K.) High School student
[2003]

The full poem is reproduced in
The 2003 OCLC Environmental Scan, p.97.

Report Findings

...on Information Consumers' Perceptions and Habits

- Respondents use **search engines** to begin an information search (84 percent). **One percent** begin an information search on a **library Web site**. *(Part 1.2)*
- **Quality and quantity of information are top determinants** of a satisfactory information search. Search engines are rated higher than librarians. *(Part 2.6)*
- The criterion selected by most information consumers to evaluate electronic resources is that the information is **worthwhile**. **Free** is a close second. **Speed** has less impact. *(Parts 3.1 and 3.4)*
- Respondents do not trust purchased information more than free information. The verbatim comments suggest a **high expectation of free information**. *(Part 3.4)*
- Library users like to self-serve. Most **respondents do not seek assistance** when using library resources. *(Part 2.4)*
- Library card holders **use information resources more** than non-card holders, and they are more favorably disposed to libraries than non-card holders. *(Parts 1.1, 1.4 and 3.7)*
- **Age matters sometimes. Sometimes it doesn't.** Responses are sometimes consistent across U.S. age groups, suggesting age-independent preferences and practices. Familiarity with e-mail is an example. In other areas, responses vary considerably by the age of the respondents. For example, young U.S. respondents are much less likely than those over 65 to agree librarians add value to the information search process. *(Part 2.6 and all Parts)*
- The survey **results are generally consistent across the geographic regions** surveyed. Responses from the United Kingdom showed the largest range of variations from other regions surveyed. *(Part 5 and all Parts)*

Report Findings

...on Libraries

- Information consumers **use the library**. They use the library less and read less since they began using the Internet. The majority of respondents anticipate their usage of libraries will be flat in the future. *(Parts 1.1 and 3.7)*
- **Borrowing print books** is the library service used most. *(Part 2.1)*
- “Books” is the **library brand**. There is no runner-up. *(Part 3.8)*
- Most information consumers **are not aware of**, nor do they use, most libraries’ **electronic information resources**. *(Parts 1 and 2)*
- **College students** have the **highest rate of library use** and broadest use of library resources, both physical and electronic. *(Parts 1 and Part 2)*
- **Only 10 percent** of college students **indicated that their library’s collection fulfilled their information needs** after accessing the library Web site from a search engine.
- The majority of information consumers are aware of many library community services and of the role the library plays in the larger community. Most respondents agree **the library is a place to learn**. *(Part 4.1)*
- Comments from respondents provide clear directions for physical libraries: be clean, bright, comfortable, warm and **well-lit**; be staffed by **friendly people**; have hours that fit their lifestyles; and **advertise services**. Find ways to get material to people, rather than making them come to the library. *(Appendix B)*

...on Alternatives to Libraries

- Information consumers like to **self-serve**. They use **personal knowledge** and common sense to judge if electronic information is trustworthy. They **cross-reference other sites** to validate their findings. *(Parts 3.2 and 3.5)*
- **Ninety percent** of respondents are satisfied with their most recent search for information using a **search engine**. Satisfaction with the overall search experience has a strong correlation to the quality and quantity of information returned in the search process. *(Part 2.6)*
- People trust what they find using search engines. They also trust information from libraries. They **trust them about the same**. *(Part 3.3)*
- **Search engines fit** the information consumer’s lifestyle better than physical or online libraries. The majority of U.S. respondents, age 14 to 64, see search engines as a perfect fit. *(Part 3.7)*

Conclusions and Observations

What was confirmed

As discussed briefly in the introduction of the report, many findings of the survey do not surprise as much as they confirm the trends we highlighted in *The 2003 OCLC Environmental Scan*.

The survey results confirm that libraries are used by information seekers. The number of people holding library cards is compelling and most information seekers use library services at least annually. Libraries are used for borrowing books, access to reference books and research assistance. Respondents shared many positive associations with these traditional resources as well as with the library space itself. When asked to give advice, many respondents suggested increasing the library's quantity and variety of traditional information resources—"more books" was often cited—as well as the number of hours libraries are open. Respondents clearly want to be able to visit the library, but they want the services to be more convenient.

The results confirm, too, that the majority of information seekers are not making much use of the array of electronic resources (online magazines, databases and reference assistance, for example) libraries make available to their communities. Very few respondents use such resources regularly and the majority of respondents are not aware that their libraries have these electronic resources. Most do not use the library Web site where access to electronic resources is made available. College students are the exception. College students use electronic resources at significantly higher rates and are the most familiar with what libraries have to offer.

Results confirm that respondents are aware that libraries are "wired" and many use the computers in libraries to access the Internet and to use Internet resources. The majority of high school and college students use library computers regularly.

The survey confirms the findings of many other studies: that there is widespread use of Internet information resources. Respondents regularly use search engines, e-mail and instant messaging to obtain and share information. Many use these tools daily; most use them weekly or monthly. Subject-based Web sites, online news services, blogs and RSS feeds are all used, even if only minimally. The library is not the first or only stop for many information seekers. Search engines are the favorite place to begin a search and respondents indicate that Google is the search engine most recently used to begin their searches.

The information resource market—tools, content and access—is growing, not shrinking, providing more options and more choices to people using the Web to search for information and content. Information consumers are willing to experiment with new resources and incorporate them into their expanding repertoire of information tools. People continue to read, but they do it less as they add other

To gather as much literature and information as possible in one place, and to share that wealth of resources with that community.

It is important to have a place where anyone can go to learn (be it news, research, films and music, fiction, or non-fiction)

23-year-old from the United States

Source: *Perceptions of Libraries and Information Resources*, OCLC, 2005, question 810, "What do you feel is the main purpose of a library?"

ways of consuming information and content to their lives. Libraries are seen as a place for traditional resources (books, reference materials and research assistance) and to get access to the Internet. The results of this survey confirm that libraries are not seen as the top choice for access to electronic resources.

Awareness, usage and preference trends held fairly consistently across the geographic regions surveyed and across U.S. age groups. While differences in age group or geographic preferences are observed, general trends hold constant. Online information consumers surveyed are “universally” using the Internet, rather than the library, to access electronic information resources.

What was revealed

The survey revealed how information consumers make choices about electronic information resources; and how they evaluate those resources and make decisions about the quality, trustworthiness and monetary worth of resources available from libraries and generally on the open Web.

While it is easy to assume that search engines are the top choice of information consumers because of the speed with which information can be delivered, the study revealed that speed is not the only, and not the primary, reason search engines are the preferred starting point for today’s information consumer. Quality and quantity of information delivered are the highest determinants of overall information search satisfaction. Respondents indicated that search engines deliver better quality and quantity of information than librarian-assisted searching—and at greater speed. As more and more content becomes digital and directly accessible via search engines, quantity will increase. The amount of quality information, overall, is also likely to increase.

Information consumers trust information they get from libraries, and they trust the information they get from search engines. The survey revealed that they trust them almost equally. While all U.S. age groups surveyed indicated trust across both sources, young people in the United States ages 14 to 24 show the greatest level of trust for information received via search engines. How much of this trust could be attributed to greater familiarity and frequent use of Web-based electronic resources? Most U.S. youth are not familiar with library electronic resources, but are very familiar with search engines, e-mail and chat. As more content becomes directly accessible via search engines, familiarity with more and different types of digital content is likely to increase. Will trust continue to increase too?

The survey highlighted that not only are information consumers happy to self-serve, they are confident that they can serve themselves well. When asked how they judge the trustworthiness of information, “common sense/ personal knowledge” was the top method used. Eighty-six percent of respondents feel confident they have the personal knowledge to evaluate information resources. When they want to validate information, they self-serve again, by searching another Web site that contains

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similar information (82 percent). This self-reliance was also reflected in respondents' use of the library. Most library users say they have not asked for help using any library resources, either at the physical or the virtual library. As more and more content becomes digital and accessible via the Internet, the number of information sources available for both information discovery and validation is likely to increase, fueling increased confidence and self-reliance.

Information consumers feel that information should be free. Most respondents will not pay for information and some who do (25 percent) expect that they will pay for information less frequently in the future. It is also clear that information seekers do not believe that higher priced information equals higher quality information. That the library provides access to “free” material is well-known. But the majority of users are not aware that free electronic information is available via their library. As many respondents are not familiar with, or infrequently use, the library Web site, the free library information is not accessed. The verbatim comments in Appendix B provide evidence of respondents' appreciation of free material as well as their frustrations with trying to access them and having to come to the library to use them. Information consumers want, and expect to use, more and more “free” and unfettered information in the future.

Survey respondents are generally satisfied with libraries and librarians, but most do not plan to increase their use of libraries. Many of them, particularly teenagers, use the library less since they began using the Internet. Verbatim comments reveal strong attachments to libraries as places, but many of these positive associations are nostalgic in nature and focused on books. As one respondent from the United States commented “...as a child I loved to go downstairs to the children's section and read books there and take them out. I loved the smell of old books.” This attachment to the traditional nature and purpose of libraries is an asset all libraries share. It is not clear that this attachment extends, or will extend, to electronic resources or that it will have a significant impact on an information consumer's choice of information sources in the future.

Respondents do indeed have strong attachments to the idea of the “Library” but clearly expressed dissatisfaction with the service experience of the libraries they use. Poor signage, inhospitable surroundings, unfriendly staff, lack of parking, dirt, cold, hard-to-use systems and inconvenient hours were mentioned many, many times by respondents. The overall message is clear: improve the physical experience of using libraries.

We learned that respondents have much to say, when asked, about their libraries, the people who staff them and the services. This suggests that libraries have an opportunity to learn much more than was revealed in this report about the perceptions of the people in their communities by conducting local polls and open-ended surveys.

*keep it
current
and keep
it free*

44-year-old from Canada

Source: *Perceptions of Libraries and Information Resources*, OCLC, 2005, question 1240, “If you could provide one piece of advice for your library, what would it be?”

The Library Brand

One of the most important goals of the project was to obtain a clearer understanding of the “Library” brand in 2005. How do information consumers think about libraries today? How do information consumers identify libraries in the growing universe of alternatives? What is the “Library” brand image?

What is the library’s identity in the minds of information seekers? By a huge margin respondents feel that “library” is synonymous with “books.” When asked about their first spontaneous impression of libraries, information consumers reply, “Books.”

Familiarity, trust and quality—these are intangible traits often summed up by the word “brand.” All brands from search engines to cars to libraries are either familiar or not, trusted or not, provide top quality or not. We tested these brand concepts in the survey.

We asked about familiarity. Libraries are very familiar as book providers. Search engines are very familiar as electronic information providers. We reviewed the concept of trust. The lines are fuzzy. Libraries and search engines are trusted almost equally. We asked about quality. Respondents see both libraries/librarians and search engines as providers of quality information. Again, the lines are blurred. In a tie, the data suggests the nod would go to search engines.

a building with books

35-year-old from Wales

Source: *Perceptions of Libraries and Information Resources*, OCLC, 2005, question 807, “What is the first thing you think of when you think of a library?”

The “Library” brand is dominant in one category—books. It would be delightful to assume that when respondents say “books,” what they really mean to say is that books, in essence, stand for those intangible qualities of information familiarity, information trust and information quality. The data did not reveal it. We looked hard. We reviewed thousands of responses to the open-ended questions that inquired about positive library associations and library purpose. We searched for words and phrases that included mentions of “quality,” “trust,” “knowledge,” “learning,” “education,” etc. We found mentions of each, but they were relatively few in number. “Books” dominated—across all regions surveyed and across all age groups.

In addition to being familiar, trusted and high-quality, strong brands must be relevant. Relevance is the degree to which people believe a brand meets their needs. In the survey we tested for relevancy and lifestyle fit. Over half of respondents said that search engines perfectly fit their lifestyle. Seventeen percent said libraries are a perfect fit. Over 20 percent said libraries do not fit their lifestyle. Of the activities that respondents are doing less since they began using the Internet, watching television was number one (39 percent) and using the library was number two (33 percent). Reading books, the dominant brand domain of the library, was third at 26 percent. That library resources and librarians add value to information search was not disputed by respondents, but the data suggest that the relevancy and lifestyle fit of that value are in question.

In a world where the sources of information and the tools of discovery continue to proliferate and increase in relevance to online information consumers, the brand

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differentiation of the library is still books. The library has not been successful in leveraging its brand to incorporate growing investments in electronic resources and library Web-based services.

Can the brand be expanded or updated to be more relevant, to be more than books? While this is a very difficult question to explore in a single survey, we briefly tested the concept. We asked respondents to identify what they felt was the “main purpose” of the library. What could/should the “Library” brand be? While a third of respondents still indicated “books” as the main purpose, over 50 percent of respondents feel “information” is the main purpose of the library. These views held fairly constant across all regions surveyed. U.S. youth were more inclined to view books as the library’s main purpose; those 25 and older had a stronger feeling that the main purpose of the library is information.

The study suggests that the potential exists to stretch the “Library” brand beyond books. More study is required.

The similarity of perceptions about libraries and their resources across respondents from six countries is striking. It suggests that libraries are seen by information consumers as a common solution, a single organization—one entity with many outlets—constant, consistent, expected. The “Library” is, in essence, a global brand: a brand dominated by nostalgia and reinforced by common experience.

This global, nostalgic perception should give the library community reason to be concerned, but it also provides a solid base from which to leverage value, and create change, on a large scale. When change is needed, scale can be incredibly useful. In a world where information is rapidly becoming virtual, a “universal” brand can be effective and powerful. Libraries must take this advantage and work collectively to “rejuvenate” the brand. It is not simply about educating the information consumer about the current library. Trying to educate consumers whose habits and lifestyles are changing and have changed seldom works. It doesn’t work for companies and it probably won’t work for libraries. Rejuvenating the “Library” brand depends on the abilities of the members of the broad library community to redesign library services so that the rich resources—print and digital—they steward on behalf of their communities are available, accessible and used. Rejuvenating the brand depends on reconstructing the experience of using the library. While the need for localized points of distribution for content that is no longer available in just physical form is likely to become less relevant, the need for libraries to be gathering places within the community or university has not decreased. The data is clear. When prompted, information consumers see libraries’ role in the community *as a place to learn, as a place to read, as a place to make information freely available, as a place to support literacy, as a place to provide research support, as a place to provide free computer/Internet access* and more. These library services are relevant and differentiated.

Libraries will continue to share an expanding infosphere with an increasing number of content producers, providers and consumers. Information consumers will continue to self-serve from a growing information smorgasbord. The challenge for libraries is to clearly define and market their relevant place in that infosphere—their services and collections both physical and virtual.

It is time to rejuvenate the “Library” brand.

**Subscribe to
Rhapsody or
iTunes
or other music
download services**

**45-year-old from the
United States**

Source: *Perceptions of Libraries and Information Resources*, OCLC, 2005, question 1240, “If you could provide one piece of advice for your library, what would it be?”

**To provide
information
on global
issues
from both past
and present and
offer usable
information/
observations
as to the
possible
future of
all things.**

56-year-old from England

Source: *Perceptions of Libraries and Information Resources*, OCLC, 2005, question 810, “What do you feel is the main purpose of a library?”