Perceptions of Libraries, 2010
Context and Community

A report to the OCLC membership
### Online consumer survey

#### Age breakouts (of Canadian respondents)

<table>
<thead>
<tr>
<th>Age</th>
<th># of</th>
<th>% of</th>
</tr>
</thead>
<tbody>
<tr>
<td>14-24</td>
<td>65</td>
<td>16%</td>
</tr>
<tr>
<td>25-39</td>
<td>142</td>
<td>35%</td>
</tr>
<tr>
<td>40-54</td>
<td>111</td>
<td>27%</td>
</tr>
<tr>
<td>55+</td>
<td>90</td>
<td>22%</td>
</tr>
</tbody>
</table>

- **2,229** Respondents
- **60%** United States
- **22%** United Kingdom
- **18%** Canada
1. Online was cool, for the youth
2. Search engines win
3. Libraries = books
4. 2% start their information search on the library Web site
5. Library use is expected to be flat into the future
6. We know good information when we see it
7. Librarians are valued
8. Libraries are trusted, about the same as Google
9. The social network?
Context & Community
From 2005 to 2010

Technology growth in Canada

Facebook grew to 21 million Canadian unique monthly visitors

26 million Canadians are online

E-book sales grew to $345 million

Mobile access to the Internet grew from 7% to 16% of Canadians

Google grew to a 83% share of Canadian searches

+930% GROWTH

+1,544% GROWTH

+43% GROWTH

+26% GROWTH
From 2005 to 2010

- Social networking: 30% in 2007, 69% in 2010; 139% growth
- Smartphone ownership: 2% in 2005, 23% in 2010; 1,050% growth
- 70% of Canadians own a cell phone.
The Great Recession

18% of Canadians—more than twice the unemployment rate—have been economically impacted

- Laid off from job, still unemployed (6%)
- Increased hours of work to make ends meet (3%)
- Reentered the work force (3%)
- Working more than one job to make ends meet
- Received a reduction in pay at current employer
- Laid off, took another job at lower pay

76%经济损失
18%未受经济影响
6%其他
The Great Recession

Canadian adults ages 25-39 impacted most

74%
21%
5%

Nearly a 1/3 of Canadian families have experienced a negative job impact

- Impacted
- Not impacted
- Other
Empowering library users

The majority of economically impacted Canadians are cutting back… but 21% are using libraries more.

Library use
- Increased: 87%
- Decreased: 21%

Dining out: 1%
Apparel: 6%
Entertainment: 2%
Vacations: 7%
Appliances: 4%

Dining out: 87%
Apparel: 80%
Entertainment: 78%
Vacations: 70%
Appliances: 55%
Empowering library users

Economically impacted are visiting the library more frequently

Visit the library at least

\[\text{once weekly}\]

<table>
<thead>
<tr>
<th></th>
<th>2010 Canadian Employment Status Not Impacted</th>
<th>2010 Canadian Employment Status Negatively Impacted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Weekly</td>
<td>11%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Empowering library users

Economically impacted Canadians use library services more frequently

Technology
- 19% use the computer (compared to 9%)
- 18% access free Internet (compared to 9%)

Borrowing DVDs/videos
- 18% borrow DVDs/videos (compared to 8%)

Reading activities
- 27% borrow print books (compared to 25%)
- 21% do leisure reading (compared to 16%)
- 17% research specific reference books (compared to 12%)
- 17% read/borrow best-sellers (compared to 15%)

Library Card
62% of Canadians have a library card
The Information
Consumer
Research
How Canadians use information sources

• **Online sources heavily used**, but users are less impressed: growth climbing, excitement declining

• **E-mail and search engines hold on** as top resources, but social sites are closing in fast
  
  – Email used by 96% of Canadians, search engines by 95%
  – 74% use social media sites and 69% now use social networking sites

Facebook was the most popular Canadian Web site in 2010

... surpassing Google for the first time!

<table>
<thead>
<tr>
<th>Most-Visited Web Sites in Canada (Q4 2010)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
</tr>
<tr>
<td>12.2%</td>
</tr>
</tbody>
</table>
Where do we begin our information search?

- **Search engine**
  - 2005: 86%
  - 2010: 85%

- **Wikipedia**
  - 2005: NA
  - 2010: 4%

- **Library Web site**
  - 2005: 2%
  - 2010: 1%

Library Web site use

- 2005: 37%
- 2010: 38%
How Canadians use information sources

• **Ask-an-expert use explodes** from 13% in 2005 to 47% in 2010.

• **Wikipedia now a staple**, Skype and Twitter on the rise.
  – Wikipedia now used by 74% of Canadians
  – Skype used by 28%, Twitter by 17%

• **Most popular library activities among library users still revolve around reading.**
  – 40% of Canadians go to the library for leisure reading and to read/borrow best-sellers at least annually
  – 51% borrow print books at least annually, 26% at least monthly
  – Since 2005, there’s been a 13% decrease in those who borrow books at least monthly borrowing and an 9% decrease in annual borrowers of print books.
How Canadians use information sources

Favorability drops for all information sources

MORE THAN 9-POINT DROP IN FAVORABILITY FOR INFORMATION SOURCES
- Online bookstores
- Physical bookstores
- Search engines
- Physical libraries
How Canadians use information sources

#1 reason for increase in library use...

To save money.
The Brand
The library brand 2010

What is the first thing you think of when you think of the library?

“Books”

- 2005: 68%
- 2010: 69%
## Libraries vs. search engines

<table>
<thead>
<tr>
<th>Feature</th>
<th>Libraries</th>
<th>Search engines</th>
</tr>
</thead>
<tbody>
<tr>
<td>More trustworthy</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>More accurate</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>Faster</td>
<td>5%</td>
<td>95%</td>
</tr>
<tr>
<td>More convenient</td>
<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td>Easier-to-use</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>More reliable</td>
<td>18%</td>
<td>82%</td>
</tr>
</tbody>
</table>
Information from library sources is...

- About the same: 68%
- More trustworthy: 24%
- Less trustworthy: 8%

...compared to search engines.
How do Canadians know if a source is trustworthy?

77%  I just know

72%  I check another site
The library brand 2010

Librarians continue to be valuable

76% 2005
74% 2010

% of people who have been assisted by a librarian and who completely agree or agree that librarians add value to the search experience
The library brand 2010

#1 reason for not using the library Web site

38%

“I did not know the Web site existed.”
Once found, the library Web site is used.

23% of searchers who start with a search engine end up at the library Web site...

94% of whom found what they needed.
The library: a valued asset

Canadians’ perceived value of the library has increased during the recession for themselves personally (16%) and for their community (26%).

Percent of Canadians who believe the value of the library has:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Increased for Me</th>
<th>Increased for My Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGE 14-24</td>
<td>+12%</td>
<td>+22%</td>
</tr>
<tr>
<td>AGE 40-54</td>
<td>+15%</td>
<td>+22%</td>
</tr>
<tr>
<td>AGE 25-39</td>
<td>+20%</td>
<td>+27%</td>
</tr>
<tr>
<td>AGE 55+</td>
<td>+16%</td>
<td>+28%</td>
</tr>
</tbody>
</table>
## The library: a valued asset

What’s most important to me and to **my community**.

<table>
<thead>
<tr>
<th>Total Canadian respondents</th>
<th>46% books, videos and music</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32% makes needed information freely available</td>
</tr>
<tr>
<td></td>
<td>30% a place to read</td>
</tr>
<tr>
<td></td>
<td><strong>26%</strong> free Internet access</td>
</tr>
<tr>
<td></td>
<td>24% books, videos and music</td>
</tr>
<tr>
<td></td>
<td>24% supports literacy</td>
</tr>
<tr>
<td></td>
<td>24% a place to learn</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Economically impacted</th>
<th>47% books, videos and music</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32% makes needed information freely available</td>
</tr>
<tr>
<td></td>
<td>32% books, videos and music</td>
</tr>
<tr>
<td></td>
<td><strong>32%</strong> free Internet access</td>
</tr>
</tbody>
</table>
By Community
Canadian teens/young adults (14-24) are using

- **100%** Email
- **93%** Search engines
- **95%** Wikipedia
- **73%** Social networking sites
- **95%** Social media sites
- **61%** Ask-an-expert sites
- **11%** Mobile devices to search Web
Canadian teens’ and young adults’ advice...

- **27%** Add or update services
- **25%** Increase customer service
- **15%** Improve the facility and environment
- **2%** I’m satisfied with my library
North American teens and young adults (14-24)

Change in use of information services from 2005.

Instant messaging
- Age 14–17: 79% in 2005, 68% in 2010, -14%
- Age 18–24: 71% in 2005, 81% in 2010, 15%

E-journals
- Age 14–17: 32% in 2005, 24% in 2010, -24%
- Age 18–24: 35% in 2005, 40% in 2010, 14%

Library Web site
- Age 14–17: 41% in 2005, 41% in 2010, 0%
- Age 18–24: 45% in 2005, 54% in 2010, 20%

Blogs
- Age 14–17: 0% in 2005, 0% in 2010, 0%
- Age 18–24: 24% in 2005, 36% in 2010, 49%
Canadians ages 25-39 are using:

- 99% Email
- 97% Search engines
- 82% Wikipedia
- 85% Social networking sites
- 89% Social media sites
- 52% Ask-an-expert sites
- 14% Mobile devices to search Web
### Canadians’ ages 25-39 advice...

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>Add or update services</td>
</tr>
<tr>
<td>19%</td>
<td>Increase customer service</td>
</tr>
<tr>
<td>10%</td>
<td>Improve the facility and environment</td>
</tr>
<tr>
<td>8%</td>
<td>I’m satisfied with my library</td>
</tr>
</tbody>
</table>
Canadian adults, ages 40-54

<table>
<thead>
<tr>
<th>Service</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>94%</td>
</tr>
<tr>
<td>Search engines</td>
<td>96%</td>
</tr>
<tr>
<td>Wikipedia</td>
<td>74%</td>
</tr>
<tr>
<td>Social networking sites</td>
<td>65%</td>
</tr>
<tr>
<td>Social media sites</td>
<td>69%</td>
</tr>
<tr>
<td>Ask-an-expert sites</td>
<td>44%</td>
</tr>
<tr>
<td>Mobile devices to search Web</td>
<td>11%</td>
</tr>
</tbody>
</table>
Canadians’ ages 40-54 advice...

- **28%** Add or update services
- **26%** Increase customer service
- **10%** Improve the facility and environment
- **4%** I’m satisfied with my library
Canadian adults, ages 55+

Canadians ages 55+ are using

- 89% Email
- 91% Search engines
- 40% Wikipedia
- 42% Social networking sites
- 33% Social media sites
- 32% Ask-an-expert sites
- 4% Mobile devices to search Web
Canadians’ ages 55+ advice...

- **24%** Increase customer service
- **23%** Add or update services
- **10%** Improve the facility and environment
- **6%** I’m satisfied with my library
<table>
<thead>
<tr>
<th><strong>Have a library card</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>62%</td>
<td>78%</td>
<td>59%</td>
<td>55%</td>
<td>63%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Visit the public library annually</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>56%</td>
<td>68%</td>
<td>52%</td>
<td>51%</td>
<td>57%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Have used the library Web site</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>38%</td>
<td>46%</td>
<td>52%</td>
<td>26%</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Access free Internet annually at the library</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>24%</td>
<td>55%</td>
<td>18%</td>
<td>16%</td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Use a computer annually at the library</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>26%</td>
<td>60%</td>
<td>22%</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Believe the librarian adds value to the search process</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>74%</td>
<td>65%</td>
<td>80%</td>
<td>73%</td>
<td>79%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Are satisfied with overall experience with librarian</strong></th>
<th>Total</th>
<th>Teens / young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>81%</td>
<td>85%</td>
<td>72%</td>
<td>81%</td>
<td>86%</td>
</tr>
</tbody>
</table>
## Canadians ... online

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>Teens/young adults 14-24</th>
<th>Ages 25-39</th>
<th>Ages 40-54</th>
<th>Ages 55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use email</td>
<td>96%</td>
<td>100%</td>
<td>99%</td>
<td>94%</td>
<td>89%</td>
</tr>
<tr>
<td>Use search engines</td>
<td>95%</td>
<td>93%</td>
<td>97%</td>
<td>96%</td>
<td>91%</td>
</tr>
<tr>
<td>Use Wikipedia</td>
<td>74%</td>
<td>95%</td>
<td>82%</td>
<td>74%</td>
<td>40%</td>
</tr>
<tr>
<td>Use online bookstores</td>
<td>64%</td>
<td>50%</td>
<td>77%</td>
<td>68%</td>
<td>51%</td>
</tr>
<tr>
<td>Use social networking sites</td>
<td>69%</td>
<td>73%</td>
<td>85%</td>
<td>65%</td>
<td>42%</td>
</tr>
<tr>
<td>Use social media sites</td>
<td>74%</td>
<td>95%</td>
<td>89%</td>
<td>69%</td>
<td>33%</td>
</tr>
<tr>
<td>Use ask-an-expert sites</td>
<td>47%</td>
<td>61%</td>
<td>52%</td>
<td>44%</td>
<td>32%</td>
</tr>
<tr>
<td>Use blogs</td>
<td>26%</td>
<td>45%</td>
<td>29%</td>
<td>22%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Looking Forward
Looking forward... hot spots

- Librarians are valued
- The library’s community value increased for 26% of Canadians
- Libraries help users save money
- Search engines are still hot
- The shine is off information resources
- Search engines and libraries are trustworthy
- Social networking is for all ages
- Information consumers are confident
- Asking questions online grows
- Ask-a-librarian services have not taken off
- “Books” as the library brand grew even stronger
- “A place to get books, videos and music” is the most important library role
Looking forward... ideas

- **Rethink online strategies** beyond the library Web site
- Embrace the brand. Extend the experience. Connect the dots.
- “Books” is our brand. E-books are books.
- Advertise, please!
- Expand library hours online
- Serve as “personal information trainers”
- Seize the moment (to talk about future money)
- Be the “third place”—online
- Learn from our newest library information consumers
- Be there.
Thanks!

Impressions & Suggestions

Perceptions of Libraries, 2010
Context and Community