

HOW AMERICANS USE ONLINE SOURCES AND THEIR LIBRARIES

Online sources are heavily used but users are less impressed

Growth in the use of online sources including e-mail, search engines, social networking (e.g., Facebook), social media (e.g., YouTube) and ask-an-expert sites (e.g., Yahoo! Answers) has continued to climb since 2005, with search engines and e-mail hitting almost total saturation with online users. Economically impacted Americans are even greater users of online resources, especially social networking and media sites. Use of library online resources and the library Web site does not reflect the growth trend, with online library use levels flat to 2005.

As Americans become more familiar, maybe even expert, with a wide range of online services, excitement with and overall impressions of information resources have declined. Information consumers are just less impressed with information sources than they were five years ago.

E-mail and search engines hold on as top resources, but social sites are closing in fast

E-mail (94%) and search engines (92%) still lead as the most widely used online resources with usage rates for both services jumping up almost 30% when compared to our 2005 study results. Most use e-mail and search engines daily. Half of Americans report using e-mail alerts as a primary means of receiving news and information. E-mail and search engines have achieved near-ubiquitous status among online Americans, and social networking and social media are quickly catching up.

With 66% of Americans now using social sites, the reach of these sites has exploded in the last four years. Social sites were among the fastest growing online resources in our survey. More than half

All ages
click here

Social use skyrockets

The popularity of social sites has **doubled** in the last three years. **All ages are participating.**



of social networking users log on daily (55%), with 80% visiting at least once a week. While social media site use (e.g., YouTube, Flickr, etc.) led the use of social networking sites (e.g., MySpace, Facebook and LinkedIn, etc.) in 2007, the distinction between social media and networking sites has quickly blurred. Social media users now log on to these sites less often than social networking users do—15% daily and 47% weekly—but more of the traditional social networking sites now offer media and content exchange as part of the service.

Social sites were used predominantly by teens (ages 14–17) and young adults (ages 18–24) in 2007 when OCLC released the *Sharing, Privacy and Trust in Our Networked World* report. Since then, there has been triple-digit growth in the use of social sites among Americans age 25 and older. Americans ages 25–45 are now using social sites at rates similar to young adults, and even exceed teens in their use of social networking.

2010 survey results reveal that Americans who have experienced a negative job impact are using social networking sites at even higher rates than Americans not impacted (80% vs. 64%), and they are also more likely to use social media sites (71% vs. 66%).

No one started their information search on a library Web site

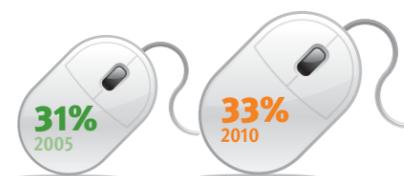
We asked information consumers in 2005 where they were most likely to start their search for information. Eighty-two percent (82%) reported that they began their information search on a search engine. One percent (1%) indicated that they started their search for information on a library Web site. When we surveyed information consumers in 2010, they were just as strongly tied to search engines as the starting point for information, with 84% beginning on a search engine. Not a single survey respondent began their information search on a library Web site.

While we did not inquire about the use of Wikipedia as a starting point for an information search in 2005, 3% of information seekers began their information searches on Wikipedia in 2010.

Where do Americans begin their information search?

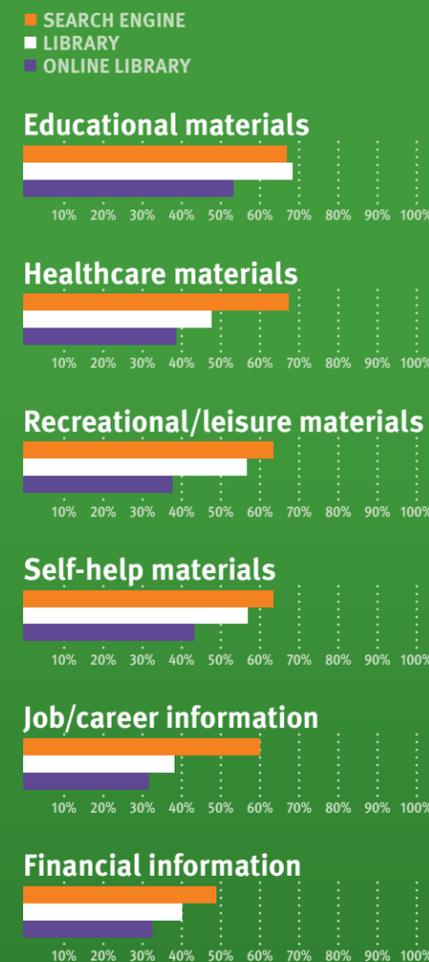


Library Web site use



Search engines favorable across all information topics

Very/somewhat favorable impressions



Although not the starting point for online information searches, library Web sites are used by a third of Americans. Use of the library Web site has remained relatively steady (33% in 2010 from 31% in 2005). Use of online databases has also held steady, at about 16% in both 2005 and 2010.

We surveyed information consumers about their overall impressions of search engines, libraries and online libraries related to the availability of six types of information: educational materials, recreation/leisure materials, self-help materials, healthcare materials, financial/money management information and job/career information. Search engines garnered the highest favorability ratings for each except for educational materials, where libraries and search engines nearly tie. Despite the higher favorability ratings for search engines, information consumers recognized the critical role libraries play. Nearly half or more of Americans attribute favorable ratings to the library related to the availability of self-help materials (57%), recreation/leisure materials (57%) and healthcare materials (48%) at the library. Two-fifths view the library as favorable for financial/money management information (40%) and job/career information (38%).

Americans who experienced a negative job impact provide even higher favorability ratings for both search engines and libraries. Three-fourths view the library as favorable for educational materials (79%) and recreation/leisure materials (75%). More than half attribute favorable ratings to job/career information (51%), financial/money management information (51%), healthcare materials (60%) and self-help materials (68%) at the library. Search engines again were rated higher than libraries.

The use of ask-an-expert sites explodes

One of the most significant changes noted from the 2005 study was the marked increase in the use of online reference, or “ask-an-expert” services. Ask-an-expert sites (i.e., question & answer sites) have experienced a tremendous increase in use, nearly tripling since 2005. Today, 43% of information consumers report using an ask-an-expert site, up from just 15% in 2005.

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Young adults showed the largest growth in demand, with use up 350%. Today, 40% of teens are monthly users of online “ask-an-expert” services.

Respondents indicated that they used online librarian question sites “as needed,” but the popularity of ask-a-librarian sites has not seen the same spike in use as ask-an-expert sites. In fact, ask-a-librarian sites have increased only slightly since 2005 (5% to 7%) and remain relatively unused or undiscovered. Availability of ask-a-librarian sites has increased since 2005, with an estimated 58% of libraries now providing such services (ALA, June 2010).

Wikipedia now a staple, Skype and Twitter on the rise

Wikipedia is now used by 73% of Americans, with half of these users visiting the site at least once a month. This usage rate rivals both search engines and social sites, making Wikipedia an information staple for online Americans.

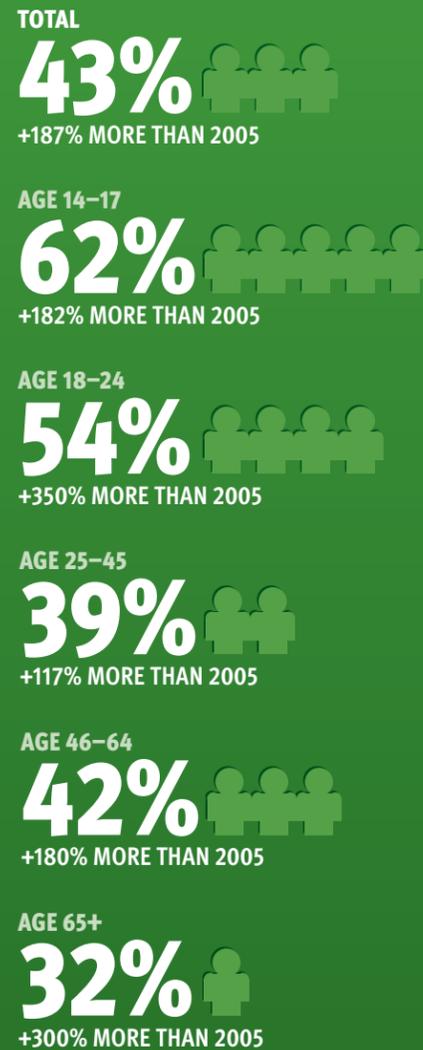
We asked about the use of two new social services that did not exist when we polled users in 2005: Skype and Twitter. Per Wikipedia, Skype is a software application that allows users to make voice and video calls over the Internet. In 2010, two in ten Americans (20%) indicated in our survey that they had used Skype. A recent version of the Skype software offers linking to Facebook.

Per Wikipedia, Twitter is a social networking and microblogging service that enables its users to send and read messages called “tweets”, text-based posts of up to 140 characters that can be displayed on a user’s profile page. It was launched in 2006. By early 2010, two in ten Americans we surveyed (18%) had used Twitter.

The most popular library activities still revolve around reading

The most popular activities among library users continue to be borrowing books and leisure reading. Two-fifths of these Americans go to the library at least annually for leisure reading

Who’s asking the experts online?



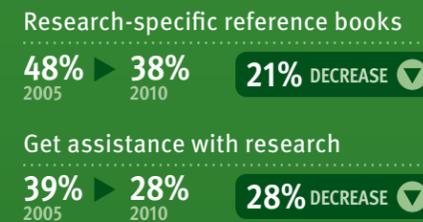
Ask-an-expert sites have experienced large gains in use, nearly tripling since 2005—from 15 to 43 percent.

Among library users...

Annual borrowing is up



But research is down



Economically impacted Americans visit the public library more often



(45%). Borrowing books continues to hold the top spot with 28% of Americans borrowing print books monthly and 59% borrowing books at least once a year.

A significant number of Americans are borrowing books even more often—a 23% bump in monthly borrowers and 11% increase in annual borrowers. Two in ten Americans also come to the library annually to read magazines (27%) and newspapers (19%).

Beyond reading, borrowing DVDs/videos also increased. A third of Americans (36%) borrow DVDs/videos annually. A quarter of Americans use technology provided by the library, such as computers (27%) and Internet (28%), at least once a year.

Library services are used even more by Americans impacted by the recession. Americans impacted by job loss are using the library at greater rates and are using a full range of library services, in addition to reading. Twice as many economically impacted Americans regularly borrow DVDs/videos (20% vs. 11% monthly). More than a third of economically impacted Americans use the computers (35%) and access the Internet for free (35%) annually at the library.

Research activity is down. Fewer Americans report conducting research activities at the library compared to five years ago. While over a third of Americans continue to conduct research at the library at least once a year, use of library research services has declined. Use of reference books is down 21% from 2005, now at 38%. Fewer Americans are asking for assistance with research at the library; 28% of users ask for help annually compared to 39% annually in 2005, a decrease of 28%.

While information resource use grows, overall impressions decline

Americans are just not as impressed with their information resources as they were in 2005. While almost all information resources saw marked increases in use over 2005, favorability rating of both online and offline information resources have

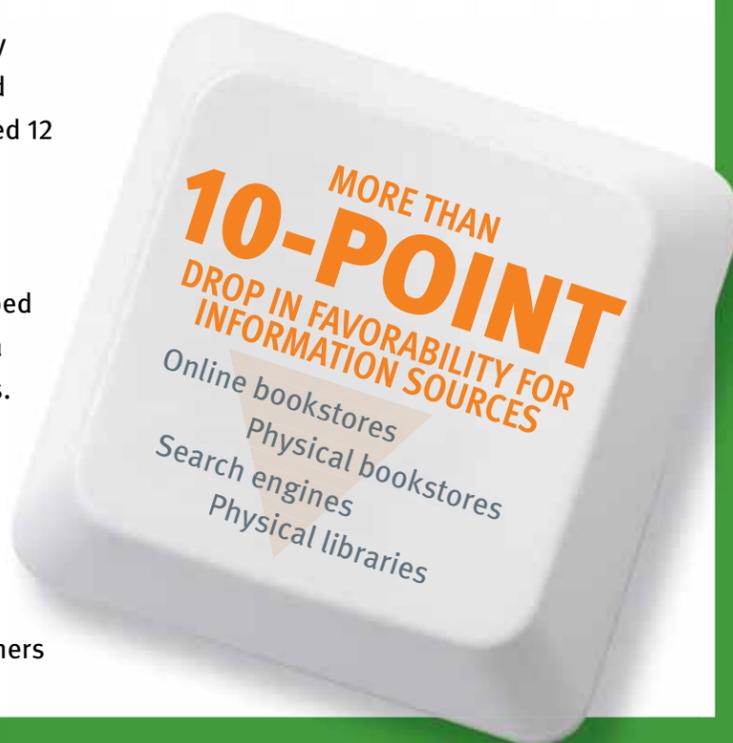
declined since 2005. Favorable ratings have declined for search engines, physical libraries, online bookstores and physical bookstores. Social networking and social media sites were not in use and therefore not rated in 2005, so perception shifts are not available.

In 2005 the majority of Americans assigned strong favorability ratings to many information resources. Search engines topped the list with an 86% favorability rating. That rating has dropped 12 points to 74% in 2010.

Libraries (80%) and bookstores (78%) also earned high, and similar, favorability ratings in 2005. Both resources have slipped over 10 points in favorability in 2010, but remain similar with a favorability rating at 66% for libraries and 65% for bookstores.

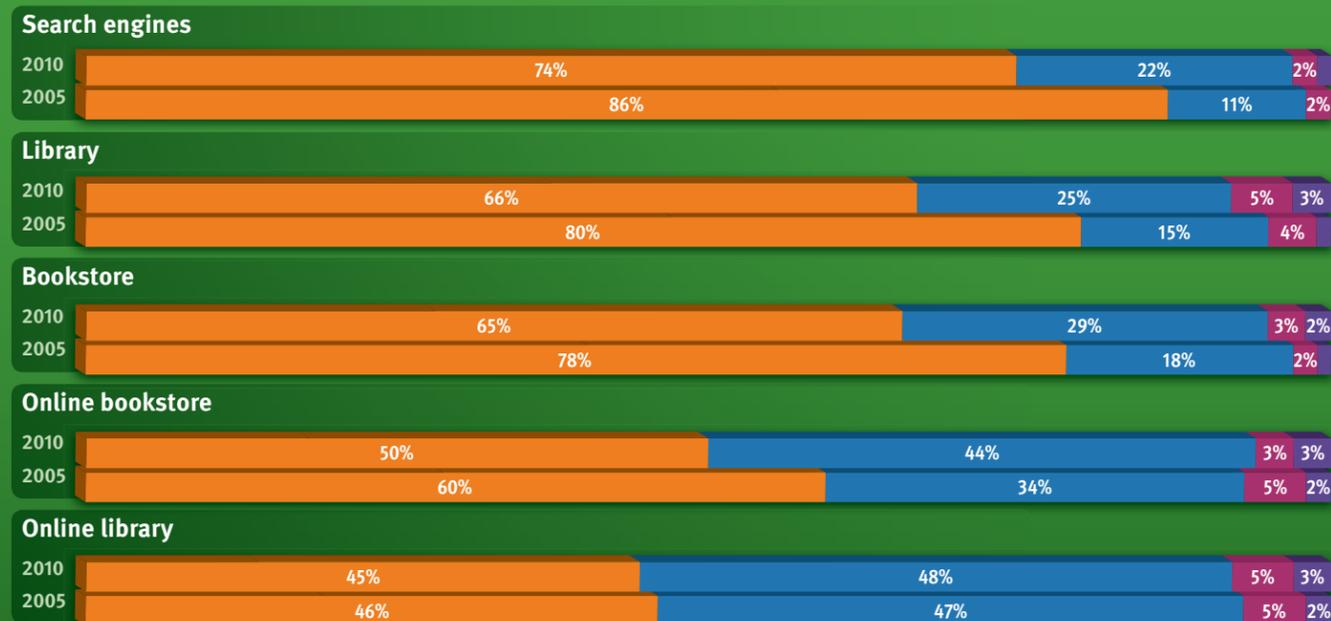
Favorability ratings of the online library remain steady from 2005, at 45%.

Our findings suggest that as online resources become more commonplace, the shine has likely dulled. Information consumers



Favorability drops for all information sources

■ VERY FAVORABLE OR SOMEWHAT FAVORABLE ■ NEITHER FAVORABLE NOR UNFAVORABLE ■ NOT VERY FAVORABLE ■ NOT AT ALL FAVORABLE



Americans' views on search engines...

“Overall satisfied but sometimes doesn't have all the info and knowledge i want but i may expect too much or it wasnt all I thought it would be.”

55-YEAR-OLD ECONOMICALLY IMPACTED

“I don't know of any place else where you could find that much information in that small amount of time.”

19-YEAR-OLD UNDERGRADUATE STUDENT

“Some of the results did not match what I was looking for but overall it was a good experience.”

67-YEAR-OLD

“Got a lot of results but only a few were helpful.”

47-YEAR-OLD ECONOMICALLY IMPACTED

are also likely to increase their expectations of all online resources as more features are added and new and more alternatives are introduced. And finally, the impact of the struggling U.S. economic environment is likely another factor lowering overall optimism and favorability.

Users' 2005 expectations about future library use prove accurate

Information consumers surveyed in 2005 accurately predicted their future library use. The majority (61%) predicted that their library use would remain steady in the next three to five years. The 2010 survey results reveal that half of users (52%) indicated their library use had remained the same in the previous year. Almost a quarter (21%) of 2005 respondents thought they would increase their library use and, indeed, a similar proportion of 2010 information consumers reported growth (27%).

Top reasons cited for increases in library use are:

- To save money (borrowing instead of purchasing) (75%)
- My children enjoy visiting the library (27%)
- Homework/school demands (25%)
- More available time (25%).

Information consumers also accurately predicted decreases in library use. Eighteen percent (18%) of Americans predicted that their library use would decline. Twenty-one percent (21%) of 2010 respondents reported a drop in library use.

The top reasons for decreased library use include:

- Less available time (33%)
- No need since leaving school/college (28%)
- Unable to get to library because homebound or disabled (20%)
- Prefer to purchase materials (16%)
- Library has an outdated collection (13%).