

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

The library brand—it's still BOOKS

The library brand is “books.” “Libraries = books” is even stronger than it was five years ago. As new consumer devices and online services have captured the information consumer’s time and mindshare, his perception of libraries as books has solidified.

In 2005, most Americans (69%) said “books” is the first thing that comes to mind when thinking about the library. In 2010, even more, 75%, believe that the library brand is books.

While the battle of e-resources and services has intensified across an increasing number of providers and services over the last five years, the landscape of print book suppliers for consumers has remained largely the same—Amazon, a few other large book suppliers and libraries. Earlier we reviewed the number-one activity at U.S. libraries is “borrowing print books,” followed by “leisure reading.” When respondents were asked to identify the most important role of the library, “books, videos and music” topped the list. This view was consistent across all age groups surveyed with the exception of teens ages 14–17, who indicated that “a place to read” was the most important library role to them. Libraries as a source of books remain both top-of-mind and top-of-personal-value for Americans.

Will the books brand perception shift as libraries increase their investments and advertising in electronic information and electronic books? A shift in expenditures from predominantly print, to print and electronic, is clearly underway. Public libraries increased expenditures on e-resources by 66% from 2003 to 2008, according to the Institute of Museum and Library Services. During this same time period, academic libraries increased e-resource expenditures by 233%, according to National Center for Education Statistics. *USA Today* reported in January 2011 that sales of the

Books

Even more Americans associate libraries with books.

75%
IN 2010
69%
IN 2005



e-book versions of the top six best-seller books from the last week of December 2010 exceeded print for the first time. Changing perceptions of libraries from books to another role would require both awareness and widespread use of electronic information services. In our 2005 study, we found that most Americans were not aware their library provided e-resources. This low level of awareness of e-resources was evident again in our 2010 study. Most information consumers continue to be unaware their library has online databases (56%), e-books (56%) and e-journals (60%).

As we did in the 2005 study, we asked not only about the “top of mind” associations with the library but also about the overall purpose of libraries. The belief that the main purpose of the library is to “provide information” remains the top belief for Americans. Half of respondents mentioned “information” as the library’s main purpose, followed by a third who said the top purpose of the library is to “provide books.” Perceptions of both the brand and the purpose of the library remain unchanged from 2005.

Americans trust themselves, search engines and libraries

When comparing libraries to search engines, overwhelmingly, Americans consider search engines to be more convenient, faster, more reliable and easier-to-use. Americans consider libraries to be more trustworthy and more accurate.

While Americans ranked libraries ahead of search engines in trustworthiness and accuracy, this distinction evaporates when asked about the **information** that is provided by search engines and libraries. Most Americans (69%) believe the information they find using search engines is just as trustworthy as they would find from their library. This perception was well-established in 2005 and remains as strong in 2010.

Information consumers are self-confident and want to self-serve. When asked how they select information sources, they say they look for a source that provides worthwhile, trustworthy and free information. Ease of use and speed are important criteria, but not

Libraries vs. search engines

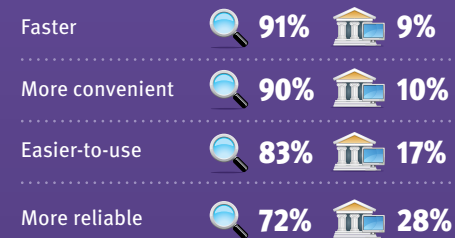
Libraries: more trustworthy

Libraries (online or physical) are considered:

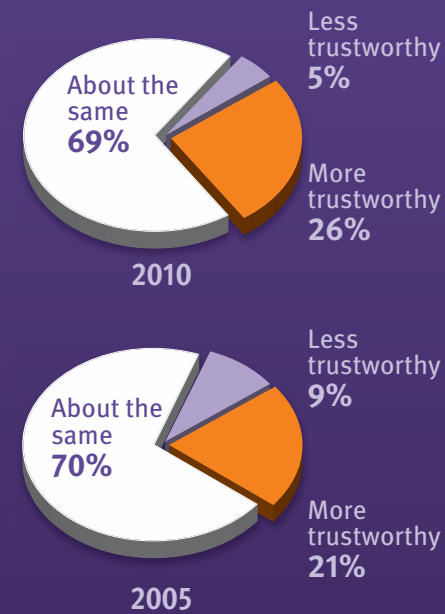


Search engines: faster

Search engines are considered:



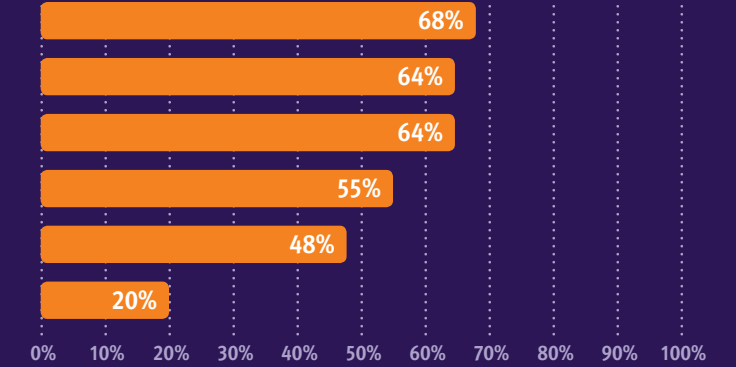
Information from library sources is...



...compared to search engines.

How do Americans choose an information source?

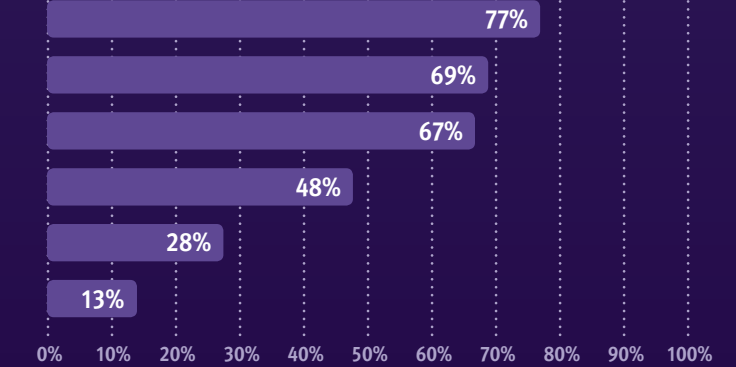
- Worthwhile information
- Trustworthy information**
- Free information
- Ease of use
- Fast information
- Based on a recommendation



How do we know it's trustworthy?

Information consumers rely on themselves to determine the trustworthiness of information.

- Based on personal knowledge/common sense
- Cross-referencing with other sites or sources
- Based on the reputation of the company/organization
- Recommendation from a trusted source**
- Based on the author/creator
- Based on the site's appearance



Who or what is our trusted source?

- 22%** Search engine
- 16% Expert in the field of interest
- 13% Other Web sites with similar information
- 10% Friend
- 6% Library materials
- 3% Wikipedia
- 1% Librarian

the top factors. When it comes to judging the trustworthiness of the information, information consumers “just know.” They use personal knowledge and common sense. If they are in doubt, they will cross-reference with other sites or sources.

Judging the trustworthiness of information based on recommendations from a trusted source continues to be important for about half (48%) of information seekers, but down from 2005 (55%). Information consumers’ top trusted source is the search engine (22%). Information consumers trust themselves, search engines and libraries for information.

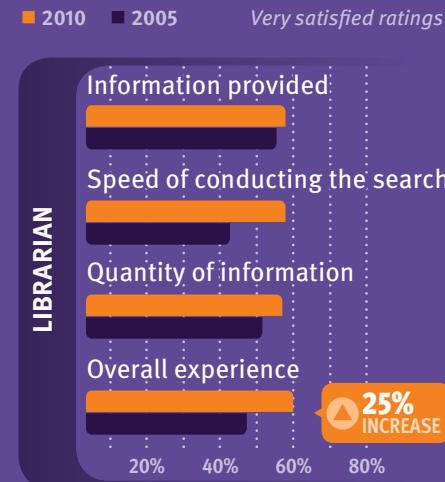
We asked about Wikipedia for the first time in 2010. Americans use Wikipedia (73%) with use rates nearing those of search engines (92%). While used extensively, Wikipedia is not seen as trustworthy as libraries. The majority (51%) rate information from library sources as more trustworthy than from Wikipedia.

Americans appreciate and value librarians

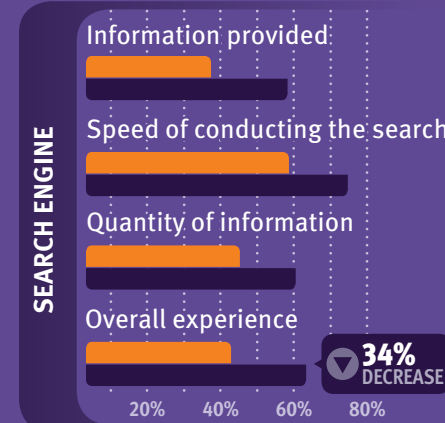
Americans see and appreciate the value of librarians. The vast majority (83%) of Americans who have used a librarian agree librarians add value to the search process, even more so than in 2005 (76%). Respondents who had experienced a negative job impact rate librarians even higher, with 88% indicating the librarian adds value to the search process.

Information consumers continue to be highly satisfied with the library and librarian experience. Survey results show a growth in the number of respondents who agree libraries provide the personnel, technology, information resources and physical environment that meet their needs. In fact, we see a 25% increase in those who indicated that they are very satisfied with the overall search experience with the librarian.

Librarian satisfaction increased...



Search engine satisfaction decreased...



84% of total respondents begin their search for information using a search engine; no respondents begin at the library Web site.

Why don't you use the library Web site?

- 39% I didn't know it existed.
- 28% I prefer to use the library in person.
- 10% I don't have a library card.
- 10% Other Web sites have better information.

As the ratings of the librarian's value in the search process climbed, the satisfaction with the experience when using a search engine declined. In the last five years, search engines have seen a 34% decline in very satisfied ratings for overall experience, with 41% indicating in 2010 that they are very satisfied, down from 62% in 2005.

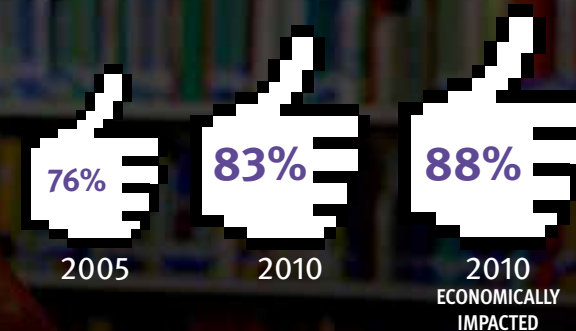
The belief that librarians add value in the search process has not transferred to the online library. As noted earlier in the report, the use of the library Web site remained flat from 2005 and no respondents started their search for information on the library Web site. The information consumer starts her information search on search engines. Fourteen percent (14%) of searchers who started on a search engine ended up at the library Web site. The majority who arrived at the library Web site used it, and with good results. Most (80%) found what they needed and over half have returned to use the site.

Much work remains to connect information consumers with library resources, but those who find the library Web site find success.



Librarians are even more valuable

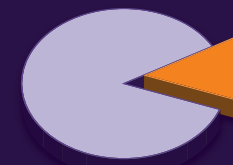
People who have been assisted by a librarian and completely agree or agree librarians add value to the search experience



Library Web site fulfills need—when discovered

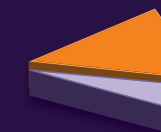
Have you ever started your search for information using a search engine and ended up at a library Web site?

YES: 14%
NO: 86%



Did you use the Web site?

YES: 77%
NO: 23%



Did you find the information you needed?

YES: 59% (USED OTHER SOURCES)
YES: 21% (ONLY SOURCE)
NO: 20%



Have you returned to the library Web site?

YES: 54%
NO: 46%



Has your library and/or library Web site use increased?

YES: 42%
NO: 58%

