



## Report Highlights

*Our survey results, research and conversations with industry leaders provide a wide body of evidence that what has been anticipated, and hyped, about the next generation Web—the creation of the social Web—is well underway. Users do not currently envision a role for libraries on their new social Web.*

### ... on Using the Web

- **The Internet has come of age, for all ages.** No longer a new technology, the Internet has become a core economic and social infrastructure for the majority of the population surveyed for this report. The vast majority (89%) of the 6,163 general public respondents have been using the Internet for four years or more; half have been using the Internet for seven years or more, a quarter have been online for nearly a decade.
- Web use is not dominated by the young. **The majority of the online population surveyed have moved from “digital immigrant” status to fully naturalized digital citizens.** Nearly two-thirds of the general public respondents over the age of 50 have been online for seven years or more, and nearly a third have been using the Internet for more than 10 years, the highest percentage of any age group.
- The Web is increasingly ubiquitous across geographies. Among respondents in all countries surveyed, **online tenure was consistent across urban, suburban and rural users.**
- The adoption of standard Internet services such as e-mail and search engines has reached near-saturation levels. In the 18 months since the publication of the *Perceptions of Libraries and Information Resources* report in 2005, the number of e-mail users in the same base countries surveyed (Canada, U.K., U.S.) increased from 73% to 97%. **The use of search engines increased from 71% to 90%.**
- The majority of Web users surveyed shop online. **More than three-quarters of the general public respondents (77%) indicated they have browsed for or purchased items online in the past 12 months.** Amazon, eBay and Rakuten are among the most used commercial sites.
- **The Web community has migrated from using the Internet to building it.** In 2005, just 16% of respondents used blogs; today that number approaches 50%. Approximately a quarter of the general public respondents have created Web pages and used chat rooms and social networking sites. **The Internet’s readers are rapidly becoming its authors.**

- **Web users read more.** Approximately a quarter of the general public respondents reported that time spent reading, print or digital, has increased over the last 12 months. **In no country surveyed was there an overall decrease in reading time.** And respondents who spend time using social networking sites read more than nonsocial site users.

## ... on Social Networks

- **The emergence of a new classification of “social” Web sites is changing the construction and culture of the Web.** In these shared spaces, users are not only the audience, but they create content, design pages and architect entirely new social networks. **We have moved from an Internet built by a few thousand authors to one constructed by millions.**
- Wikipedia defines a social network as a social structure made of nodes (generally individuals or organizations) tied together by specific types of relationships, such as values, visions, ideas, financial exchange, friends, kinship, etc. Social sites are classified in the report into two types: **social networking sites designed to allow users to interact and share interests, attitudes and activities (e.g., MySpace, Mixi, Facebook, etc.); and social media sites used predominantly to post, access and exchange content (e.g., YouTube, Snapfish, etc.).**
- On average, **more than a quarter of the general public respondents currently participate on some type of social media or social networking site.** Respondents in the U.S. lead in the number of social networking site users at 37%; respondents in the U.K. lead in use of social media sites at 34%.
- **Over half of college students surveyed (56%) use social networking sites.** (See Appendix A.)
- **MySpace, the number one social networking site used by survey respondents,** was launched in 2003. MySpace is the top social networking site used by our respondents in Canada (60%), the U.S. (75%), France (70%), Germany (54%) and the U.K. (72%). Mixi dominates social networking use in Japan (91%). Alexa ranked MySpace sixth in global traffic in September 2007.
- **YouTube is the top social media site among respondents in all countries surveyed:** Canada (73%), U.S. (73%), Japan (83%), France (76%), Germany (83%) and the U.K. (83%). Alexa ranked YouTube fourth in global traffic in September 2007.
- **The general public respondents are more likely to have used a social networking or social media site (28%) than to have searched for or borrowed items from a library Web site (20%).**
- Social networking site users are active participants. **More than a third of social networking users (39%) log in at least daily,** often several times a day.
- **Frequency of use on Mixi is the highest of any social networking site, with 59% of users logging onto the site at least daily;** 34% log on several times a day.
- Much of what takes place on social spaces is motivated by a desire to increase

personal interaction. ***My friends use the same site (66%) is the top criteria in using a social networking site.*** *To network or to meet new people, The Web site is fun and to be part of a group or community* are also top social networking site selection criteria.

- **Forty-two percent (42%) of social networking users agree these sites help maintain current relationships.** An even higher rate, 47%, agree that social networking sites *help build new relationships*.
- To date, social networking users stay with their favorite sites. **Just 16% have stopped using a social networking site in the last 24 months.**
- **Cell phones are becoming social networking devices.** The majority of respondents have cell phones and **more than three-quarters are now using their phones for more than just talking.** Over half use text-messaging, while in some countries, usage approaches 80%. Japanese respondents lead other countries surveyed in use of cell phones for searching the Internet. While 15% of the total general public respondents across all countries use cell phones to search the Internet, nearly three times more Japanese respondents do so, at 40%.

## ... on Sharing on the Web

- **General public respondents are sharing information, including personal information, on a growing number of commercial Web sites.** Approximately three-quarters of users of commercial sites have supplied their given/first name, surname/last name, e-mail and street address; about half have provided a phone number, birthday and credit/debit card information.
- Respondents provide information on commercial sites to be notified about future events or services. **A third of commercial site users have signed up for electronic newsletters and have provided information to receive e-mail alerts; a quarter have created “favorites.”**
- **Sharing on social networking sites showed different patterns from sharing on commercial sites.** Users of social networking sites are less likely to have provided contact information (name, address, phone number, etc.) but are much more likely to have shared individual information (birthday) and interest information (books read, subjects of interest, etc.). While 73% have provided a surname/last name on a commercial site, only 46% have shared their surname/last name on a social networking site. Fifty percent (50%) have supplied a phone number on a commercial site; just 12% have done so on a social networking site. **On social networking sites, 39% have shared a book they have read, 57% have shared photos/videos and 14% have shared self-published information.**
- **College student respondents are more likely to share information on social networking sites** than the total general public. (See Appendix A.)
- **Sharing habits on both social networking and commercial sites vary among respondents by country,** but most show a strong willingness to have contributed information on social sites. Social networking users in Canada, the U.S. and the U.K. are more likely to have shared personality or physical attributes on a social networking site than users in Japan, France or Germany.

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- When registering on a Web site, general public respondents are willing to provide more than just what is required; **67% *always, often or sometimes* complete the entire registration form, not just the required information.**
- The majority of the respondents (54%) are more comfortable sharing their “true personalities” (feelings, attitudes and interests) in person. **Thirty percent (30%) are equally as comfortable online as in person and about 16% are more comfortable sharing their true personalities online.**

## ... on Privacy

- **Respondents are split on their views about Internet privacy and security.** Twenty-three percent (23%) of the general public respondents feel their personal information is *kept more private* on the Internet than it was two years ago; 27% feel it is *kept less private*. A roughly equal number, 29%, feel there has been *no change* in Internet privacy; 21% are *not sure*.
- **Attitudes on Internet security were similarly split.** Twenty-six percent (26%) of respondents feel their personal information is *kept more secure* on the Internet than it was two years ago and 25% feel it is *kept less secure*. Thirty percent (30%) believe there has been *no change* in Internet security and 19% are *not sure*.
- Our research showed a relationship exists between the views on privacy and security on the Internet. **Respondents who feel their personal information is *kept more private* on the Internet tend to feel it is *kept more secure* as well.** In fact, 74% of those who feel their personal information is *kept more private* also feel it is *kept more secure*.
- **Views on privacy and security vary by country.** Respondents in Canada, the U.S., France and Germany are more likely to feel their personal information on the Internet is *kept more private* than it was two years ago compared to respondents in the U.K. and Japan. Respondents in Canada and France are more likely to feel their personal information is *kept more secure* on the Internet; only 10% of French respondents feel their personal information is *kept less secure*.
- **College student respondents are slightly more likely to feel their personal information is *kept more private* and *kept more secure* on the Internet** than it was two years ago compared to the total general public. (See Appendix A.)
- **Eleven percent (11%) of the general public respondents have had their personal information used without their consent.** This number is consistent across all countries surveyed.
- Privacy matters to respondents. Over 10,000 verbatim comments were analyzed to understand privacy concerns among the general public respondents. ***Advertising/spam, identity theft and protecting personal information were top privacy concerns.*** More than 10% indicated they had *no privacy concerns*, 3% expressed concerns about *privacy rights* and 0.5% had concerns related to *library/reading privacy issues*.

- Over 60% of the general public **respondents feel that online banking/investments Web sites are *extremely or very private***, the highest privacy rating of services evaluated. **No other activity came close.** Over 40% feel their use of the telephone, cell phones and e-mail at home is *extremely or very private*; 15% feel their activity on search engines is *extremely or very private*.
- **Respondents do not distinguish library Web sites as more private than many other sites they are using.** Just 11% of online users surveyed feel that activities done while using a library Web site are *extremely or very private*, a rating slightly lower than search engines (15%), social networking sites (15%) and online bookstores (12%).
- While a third or more of users of social, commercial and library sites *agree* they prefer to remain anonymous while using these sites, **most use their real names (65%), real e-mail addresses (80%) and real ages (80%), and over half provide their real telephone numbers when registering at a Web site.**

## ... on Privacy Rules and Trust

- Respondents feel it is important to have control over how their personal information will be used or shared on the Internet. **Nearly three-quarters of respondents indicated that it is *extremely or very important to be able to specify who can use and who can view their personal information*. Less than half, however, *always or often* actually use those controls** to specify who can view their personal information when using social networking sites (45%), social media sites (36%) or the library (24%), indicating a gap between expectations and actions.
- Although respondents attach a high importance to being informed about how their information will be used on the Internet, just **a third *always or often* review a social networking site's privacy policy before registering**; 26% of library users review the privacy policy on a library Web site before registering.
- **Security icons are viewed more often than privacy policies. Over half of respondents *always or often* look for security icons while browsing or shopping on Web sites.** Shoppers in Germany and Japan are less likely to look for security icons; while French users are most likely.
- **Online trust increases with usage.** Half of commercial site users *agree* that the longer they use the Web site, the more they trust it. Forty-one percent (41%) of social networking sites users and 37% of social media site users also indicate that trust increases with usage of the respective sites; 32% of library Web site users indicate that trust grows with use.
- **Seventy percent (70%) of social networking users indicate they *always, often or sometimes* trust who they communicate with on social networking sites.**

## ... on Information Privacy and Library Privacy

- **Respondents do not attach a high degree of privacy to searching and browsing information.** Just over a quarter of respondents (28%) feel that the subjects they search on a search engine are *extremely* or *very private*. **Subjects searched while at the library or a bookstore, or while using the library Web site or online bookstore are even less private;** fewer than 20% feel this information is *extremely* or *very private*. Just 16% of respondents indicated that the specific books they read are *extremely* or *very private*.
- **While less than 20% of general public respondents feel library information or books read are *extremely* or *very private*, approximately half feel it is *extremely* or *very important* that the library keep this information and other library activities private.** The desire for library information privacy was consistent across all countries surveyed.
- **While 64% of respondents feel it is *extremely* or *very important* for the library to have a privacy policy, just 26% *always* or *often* review the library Web site privacy policy before registering.**
- Most respondents feel it is *extremely* or *very important* that libraries keep their library information private, yet **less than 15% feel that their activities on library Web sites are *extremely* or *very private*.**
- Libraries are seen as trustworthy institutions; **60% of general public respondents agree they trust the library.**
- **Library Web sites, however, are not seen as any more private than commercial or social sites researched.** Commercial bank sites were the only sites evaluated that are differentiated as more private.

## ... on U.S. Library Directors

A total of 382 U.S. library directors completed the same base survey questions as the online general public. Directors were asked additional questions about their views on user activities and attitudes. A third of U.S. library director respondents (34%) are under the age of 50 and 66% are 50+. Just 4% of respondents were under the age of 30.

- Library directors are Internet pioneers. **U.S. library directors have been using the Internet longer on average than any group surveyed;** 60% reported that they have been online for more than a decade, double the rate of the U.S. general public.
- On average, **library directors are more likely to have used Internet services than the populations they serve.** More directors have browsed or purchased items online, 92% compared to 76%; read someone's blog, 68% compared to 44%; and created a Web page, 37% compared to 18% for the U.S. general public.
- Five years ago, most U.S. library directors were concerned about the validity and credibility of information located using Internet search sites. Concerns continue, but today, **directors are using Internet search engines (97%) at a rate greater than the U.S. general public (86%).**

- **Overall, U.S. library directors feel their personal information is *kept less private* and *kept less secure* on the Internet than it was two years ago.** The U.S. general public feel that, overall, their personal information is kept as private or more private and kept as secure or more secure on the Internet than it was two years ago.
- **The use of social networking sites by U.S. library directors is substantially less than that of the U.S. general public;** 22% of U.S. library directors have used a social networking site, compared to 37% of the U.S. general public. While overall usage lags behind the U.S. general public, library directors ages 22–49 have used social networking sites (38%) at a rate on par with the total U.S. general public.
- **U.S. library directors have the same favorite social sites as the U.S. general public.** MySpace (75%) is the top social networking site for U.S. library directors; YouTube (72%) is the top social media site.
- **Amazon (92%) was the most used browsing/purchasing site among library directors.** A library Web site was second, at 77%.
- While directors share many of the same favorites as the U.S. general public, their motivations for using these services vary. **U.S. library directors are more likely to use social networking sites to use the service in conjunction with their work. The U.S. general public is more likely to utilize these sites for social functions.**
- **Online privacy is more important to U.S. library directors than to the U.S. general public.** Directors are much less likely, and in many instances, significantly less likely to share personal information on social networking and social media sites than the U.S. general public. For all types of personal information evaluated, library directors ages 22–49 are more likely to have shared information on a social networking site than their colleagues age 50+.
- **Top privacy concerns for U.S. library directors surveyed mirror those of the U.S. general public: *advertising/spam, credit and financial theft* and *identity theft*.** Neither the U.S. general public nor U.S. library directors listed *freedom of thought* as a significant privacy concern.
- **Both U.S. library directors and the U.S. general public rely on security icons as a measure of a Web site's security.** Directors check for privacy policies at a higher rate than the U.S. general public.
- **U.S. library directors have an inflated view of the information privacy attitudes among the U.S. general public, particularly related to privacy of library information.** While less than 20% of the U.S. general public indicated that library items checked out online or in person were *extremely* or *very private*, over 50% of library directors estimated users would consider this information to be *extremely* or *very private*. While 16% of the U.S. general public indicated that books they have read are *extremely* or *very private*, nearly half (48%) of library directors estimated users would consider this information *extremely* or *very private*.
- **U.S. library directors feel it is their professional responsibility to keep a user's library information private.**

## ... on Libraries and Social Networks

- **Thirteen percent (13%) of the total general public and 9% of the U.S. general public respondents feel that it is the role of the library to create a social networking site for their communities;** about a third are not sure. Top reasons provided for why the library should not build a social networking site: *Library is for learning/information* (25%), *Not the role of the library* (16%), *Library is not for socializing* (7%), *Don't care/no opinion* (7%) and *Personal/individual matter* (7%).
- **Fourteen percent (14%) of U.S. library directors believe social networking is a role for libraries;** about 40% of directors are not sure. Top reasons library directors provided for why the library should not build a social networking site: *Not the role of the library* (30%), *Enough social networking sites exist already* (16%), *Library is for learning/information* (14%) and *No time/resources* (9%).
- Both the total general public respondents and library directors indicated that hosting **book clubs was the top social networking service that libraries should consider if they were to build social networking sites.** A small number of the total general public respondents also indicated that homework help, support groups, sharing interests and education services could be useful social networking library services.
- As of September 28, 2007, **MySpace had 197 groups with “book club” in the title.**

## ... on Countries

The survey findings highlight the reality that the Internet is indeed becoming a World Wide Web; a platform for international sharing, multicultural contribution and global community. Much of what respondents told us about online practices, attitudes and activities on their favorite sites held constant across all countries surveyed. Having shared common Internet services, tools, sites and protocols since the inception of the Web, Internet users have in many ways created a common online culture and community. And yet it was also evident from the findings that the emerging social Web can equally support individualization and cultural expression. We observed both trends in our research.

### A unified Web culture

- **All countries surveyed use common Internet services**—e-mail, blogs, IM, commerce sites, social networking sites, library Web sites, etc.—**and use them at strikingly similar rates.**
- All countries use common Web sites, and in most instances, **YouTube, Amazon, eBay and MySpace were the favorites.**
- **Motivations for using social sites are common**—my friends are there.
- Participation in online activities is comparable across all countries—**searching, shopping, blogging and online banking are used at very similar rates.**



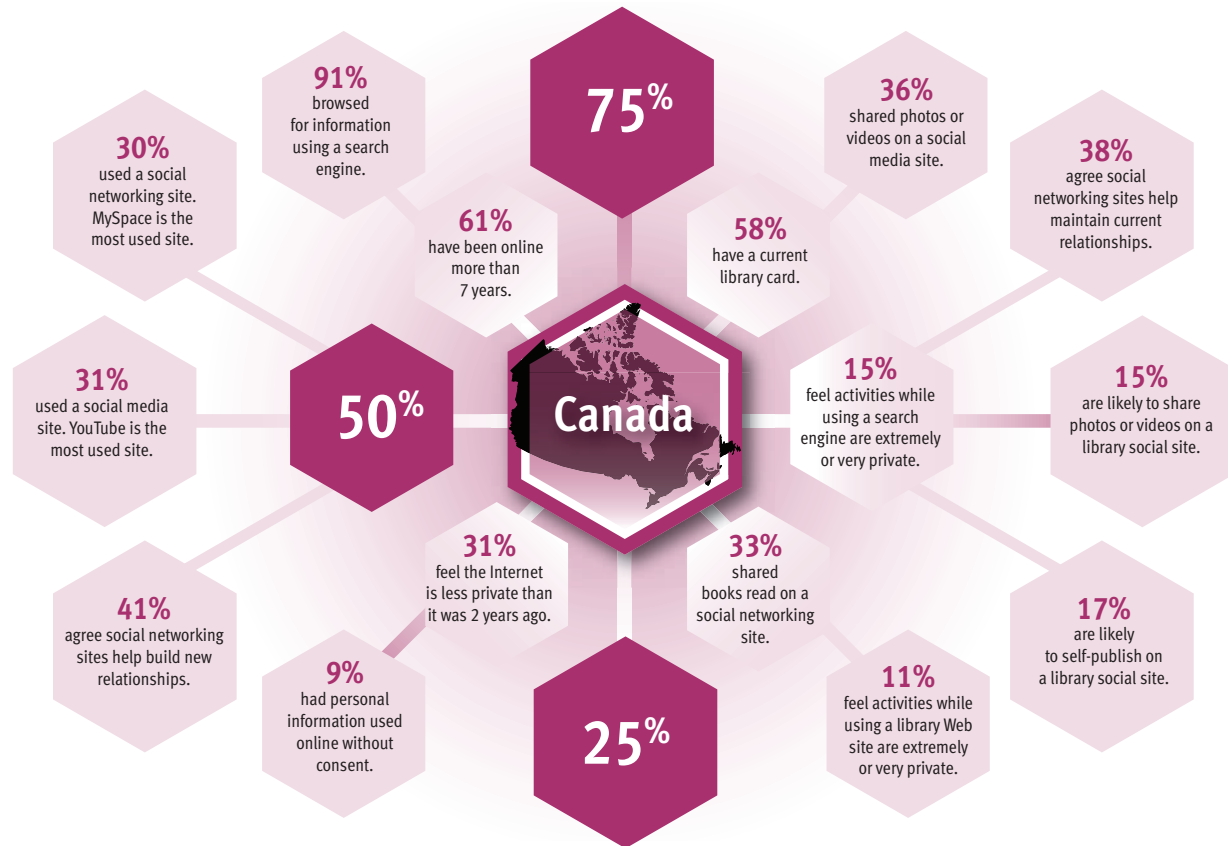
- Attitudes about **Internet privacy and security are consistent—users are comfortable.**
- **Views on libraries and information privacy** are alike across geographies—**these activities are not very private.**

## Distinctions

- While all countries share the same top Internet sites, **many country-specific commercial and social sites are frequently used by respondents.**
- **Japanese respondents expressed the most distinctive views** about all aspects of life online—commerce, sharing on social sites, privacy and libraries.
- **American respondents are the most indistinguishable** across countries surveyed, with very few “most” or “least” in any area of research.
- **Canadian and American views are largely consistent** across almost every dimension.
- **Germany and France often provide the highest activity levels** in many of the commercial and social online activities.
- **The U.K. reported many of the highest levels of browsing and purchasing activity.**

The following pages contain a “country focus” profile on each of the six countries surveyed. The graphics provide a quick overview of the respondents’ online activities, use of social sites, views on Internet privacy and security, and the role of libraries on the social Web.

## Country Focus ... on Canada

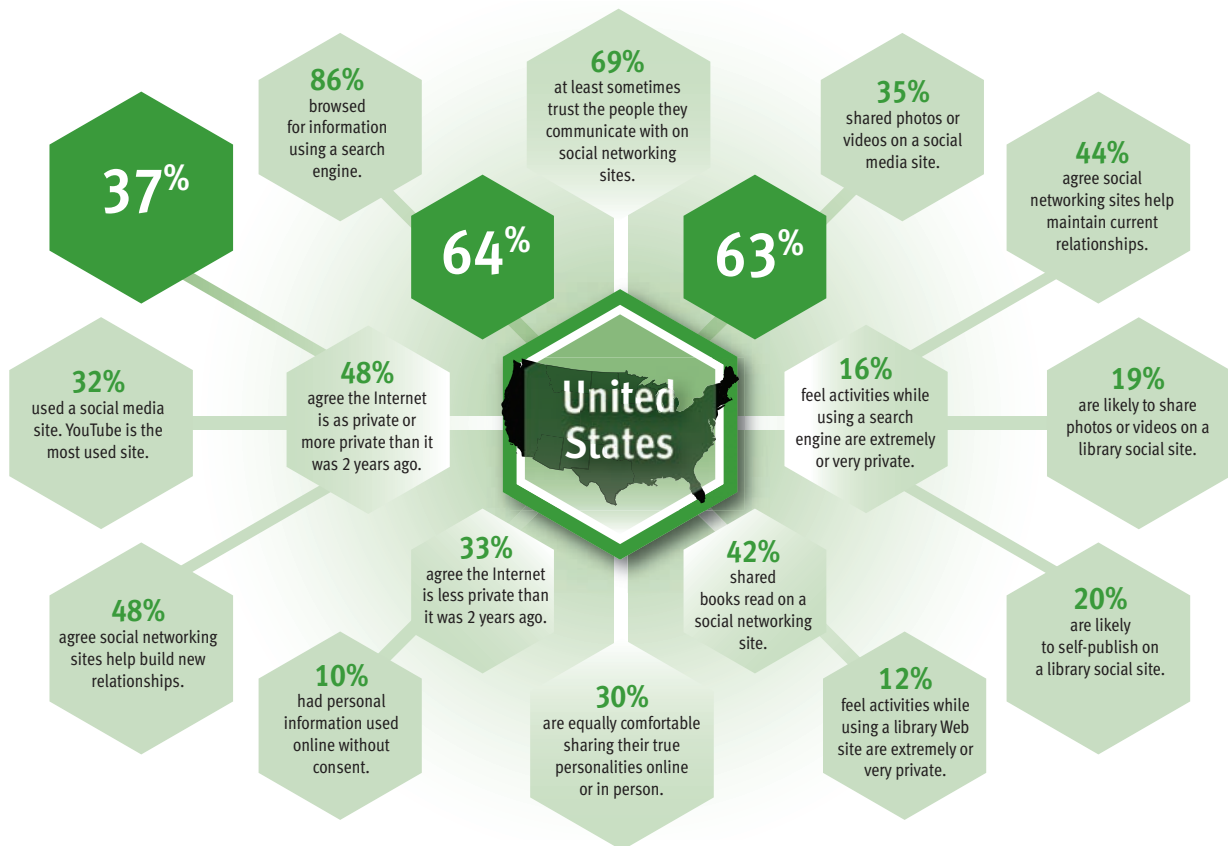


**75%** Highest frequency to trust the people they communicate with on social networking sites. (Total general public = 70%)

**25%** Low percentage who are equally comfortable sharing their true personality online or in person. (Total general public = 30%)

**50%** Feel the Internet is as private or more private than it was two years ago. (Total general public = 52%)

# Country Focus ... on the United States

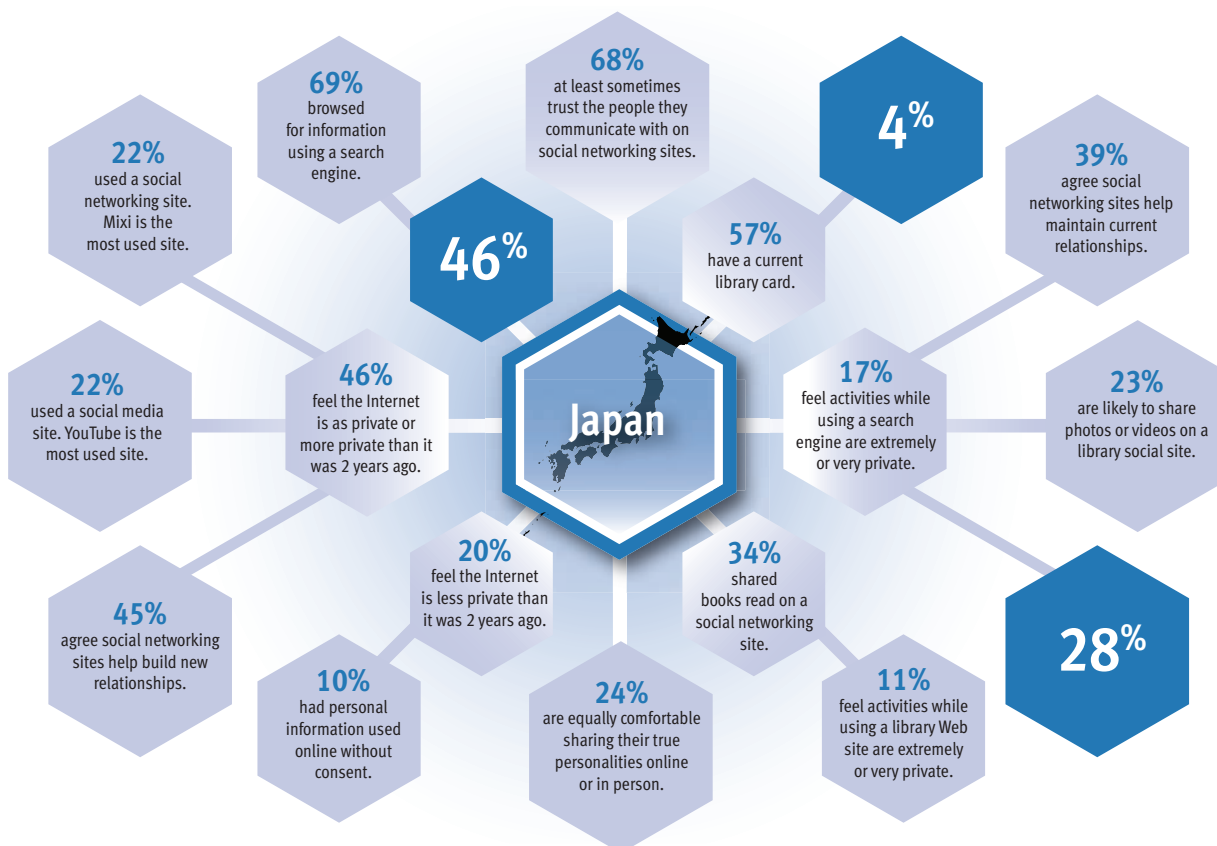


**37%** Highest usage of a social networking site in the last year. Most used site: MySpace. (Total general public = 28%)

**64%** Highest percentage to be using the Internet for seven years or more. (Total general public = 58%)

**63%** Highest propensity to have a current library card. (Total general public = 55%)

## Country Focus ... on Japan



46%

Lowest percentage to be using the Internet for seven years or more. (Total general public = 58%)

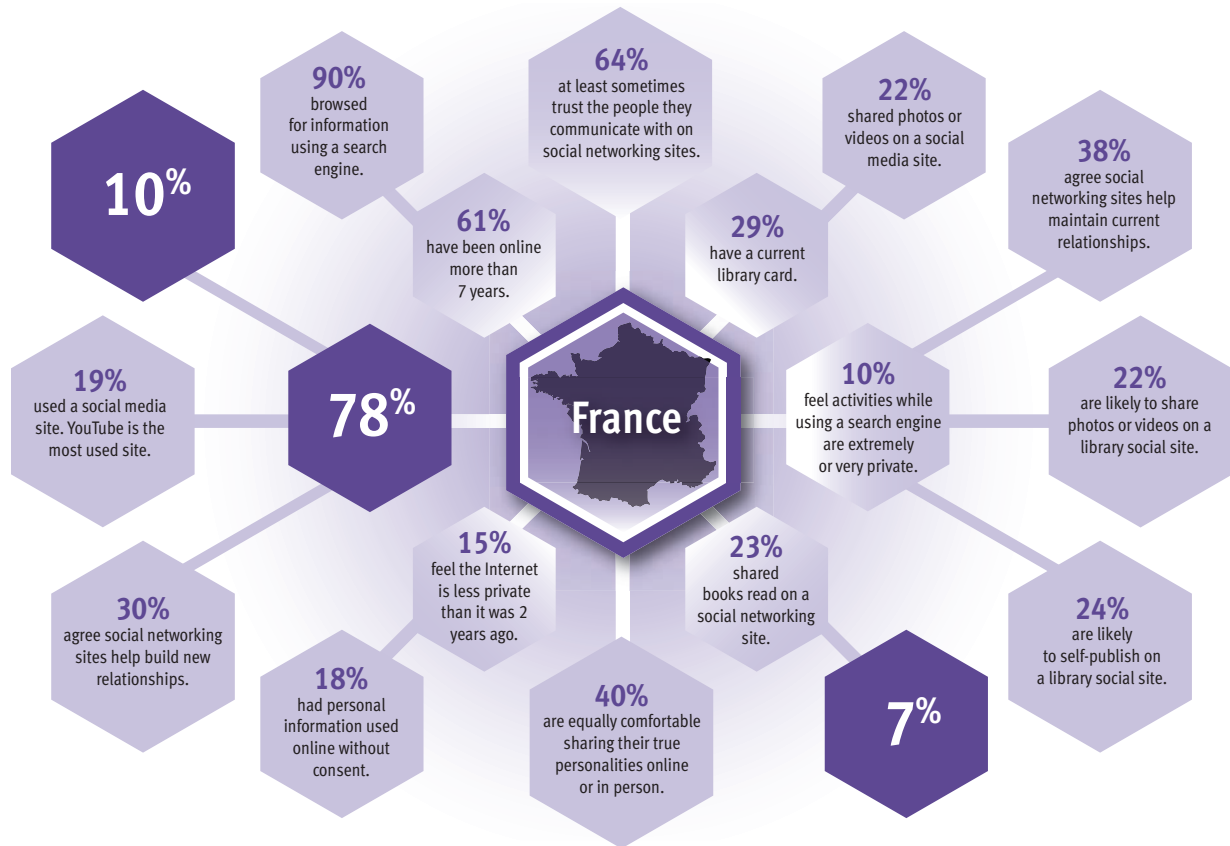
28%

Among the highest percentage to be likely to supply self-published information on a library social site. (Total general public = 22%)

4%

Lowest percentage to have shared photos or videos on a social media site. (Total general public = 30%). However, 51% take/send photos on their cell phone. (Total general public = 39%)

# Country Focus ... on France



**10%**

Least likely to have used a social networking site in the last year. (Total general public = 28%)

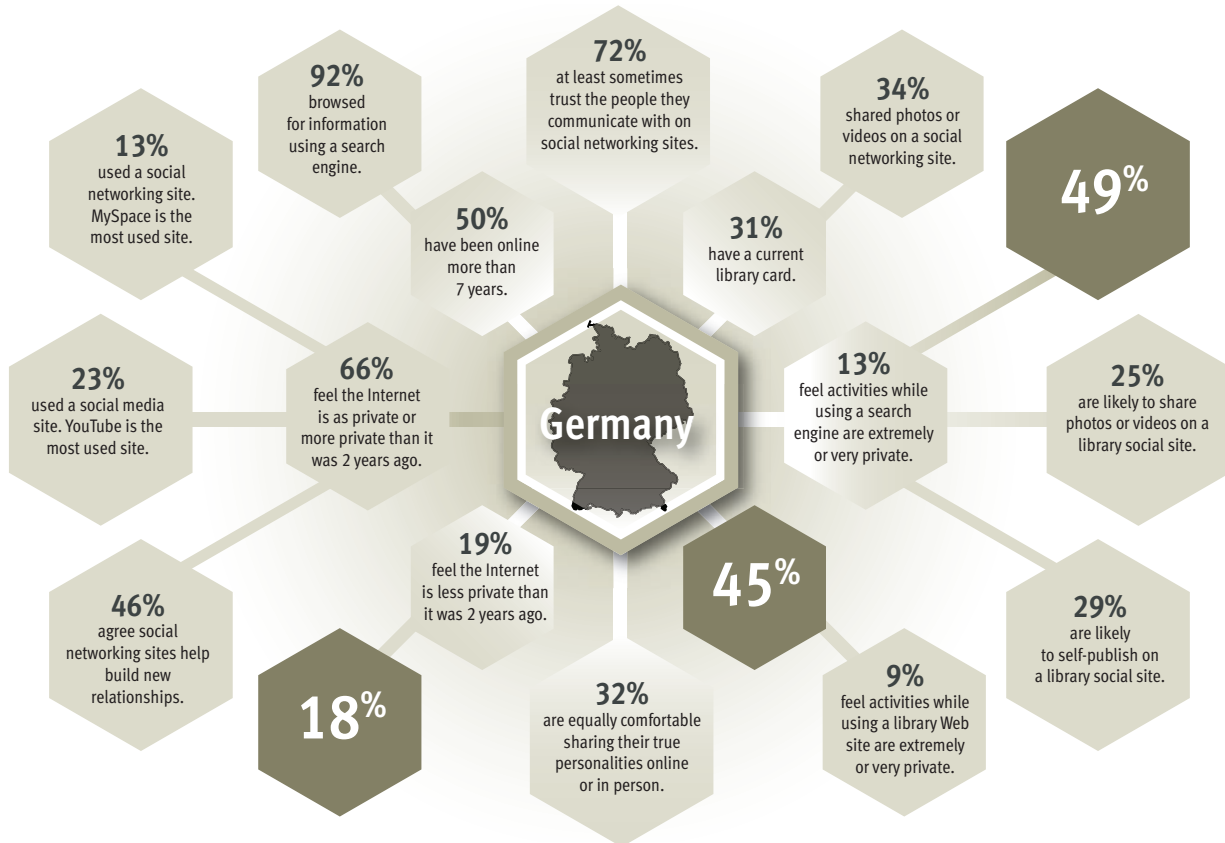
**78%**

Highest confidence in Internet privacy—feel the Internet is as private or more private than it was two years ago. (Total general public = 52%)

**7%**

Lowest percentage to feel their library Web site activities are extremely or very private. (Total general public = 11%)

# Country Focus ... on Germany



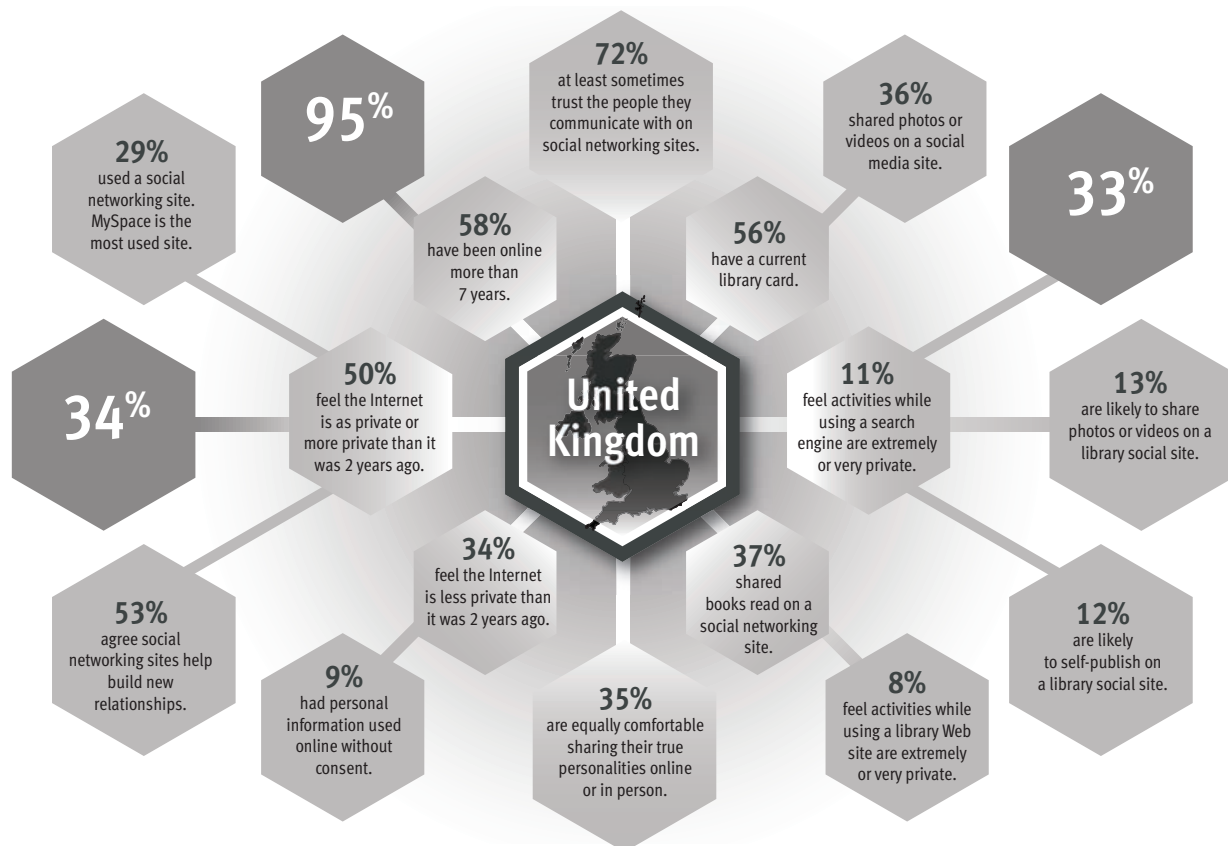
**45%** Highest percentage to have shared books read on a social networking site. (Total general public = 39%)

**49%** High percentage of social networking users who agree these sites help maintain current relationships. (Total general public = 42%)

**18%** High percentage who have had their personal information used online without their consent. (Total general public = 11%)

# Country Focus

## ... on the United Kingdom



Highest propensity to have used a search engine in the last year. (Total general public = 85%)



Highest percentage of the general public to have used a social media site in the last year. (Total general public = 28%)



Lowest percentage of social networking users who agree these sites help maintain their current relationships. (Total general public = 42%)

