Perceptions of Libraries and Information Resources

A Report to the OCLC Membership

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Introduction

In 2003, OCLC published *The 2003 OCLC Environmental Scan: Pattern Recognition* as a report to the OCLC membership to identify and describe issues and trends that are impacting and will impact OCLC and, in particular, libraries. The goal of the report was first to inform OCLC's key decision makers to guide them in strategic planning and later to serve as a reference document for librarians as they work on strategic planning for their institutions and communities. Over 7,500 copies of the *Scan* are in circulation and more than 15,000 librarians have engaged in discussions with colleagues and OCLC management on findings and future opportunities.

In the introduction to the *Scan* (page ix), we wrote: "It has become increasingly difficult to characterize and describe the purpose of using libraries […] The relationships among the information professional, the user and the content have changed and continue to change." Another way of stating this is that trends indicate a dissonance between the environment and content that libraries provide and the environment and content that information consumers want and use. Three major trends were identified in the *Scan* that provide evidence of that dissonance. Self-service, satisfaction and seamlessness seem to exemplify the expectations of the information consumer in the huge "infosphere" in which libraries operate. The characteristics that support self-service, satisfaction and seamlessness, such as ease of use, convenience and availability, appeared to many information professionals, including the authors of the *Scan*, to be as important to the information consumer as information quality and trustworthiness.

The *Scan* provides references to studies, articles and reports that support the identification and analysis of these overarching trends. But, few of these resources emanated from the part of the infosphere that OCLC and libraries inhabit and there are no major recent empirical studies that look specifically and broadly at the role libraries and librarians play in the infosphere, from the point-of-view of the information consumer. How are libraries perceived by today's information consumer? Do libraries still matter? On what level? Will library use likely increase or decrease in the future?

As a consequence, early in 2005, OCLC Market Research staff, with input from many other OCLC staff and hundreds of librarians who have contributed to discussions and workshops, conceived of a project designed to better understand these trends as they relate to libraries and the information consumer. To that end, OCLC commissioned Harris Interactive Inc., a company that for 45 years has provided custom research to a broad range of clients including nonprofit organizations and governmental agencies, to administer the resulting survey on behalf of OCLC. We were clear as to the goals of the survey. We wanted to know more about people's information-seeking behaviors, how familiar people are with the variety of e-resources libraries provide for their users and how libraries fit into the lives of the respondents. One of the most important goals of the project as a whole was to collect information that would help us build a better understanding of the "Library" brand.

The topics explored in the survey include the perceptions and preferences of information consumers; users' relationship with and use of libraries, including usage of and familiarity with electronic information resources; awareness of libraries and resources offered; the "Library" brand and its ubiquity and universality; trust of libraries and their resources; and people's perceptions of the library's purpose/mission.

We wanted to survey a broad set of information consumers. Our goal was to gather survey data across a wide range of age groups and geographic regions. We also wanted to understand more about college students as information consumers, both inside and outside the United States. Given budget constraints and geographic reach goals, this survey was administered electronically and in English. All respondents therefore use the Internet, are at least somewhat familiar with using electronic Web resources and took the survey in English. Respondents could have taken this survey in a library that provides Internet access, as some respondents indicated they access the Internet via the library.

We understand that the results, therefore, represent the online population, a subset of library users. Please read the survey results with this in mind. We did. We are also mindful that the survey respondents do represent a significant, and potentially growing, percent of library and potential library users. As outlined more fully in the Methodology section of the report, the survey was weighted demographically and fairly represents the online population of all countries surveyed except India, due to low sample size. Recent surveys report that over 60 percent of the Australia, Canada, Singapore, United Kingdom and United States populations have Internet access and

My mom loves the library and is there all the time **but I never think of it.** *I think they should look into ways to bridge the generation gap.*

33-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 to your library, what would it be?"

i do not use it

however it is a good place for research but think the internet is better for information & faster

33-year-old from the United Kingdom

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

You can still do **better** *there is always scope for improvement*

66-year-old from India

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

the growth in Internet access over the last five years is staggering. Most countries surveyed have seen an increase in Internet access of 50 to 100 percent. Information consumers are using the Internet more—both at the library and elsewhere.

The findings presented in this report do not surprise, they confirm. During the hundreds of *Scan* discussions and meetings held over the past 24 months, several recurring themes surfaced. "Users are not aware of the electronic resources libraries make freely available." Our survey findings bear this out. "Users are as comfortable using Web information sources as library sources." Our study shows this perception also to be true, across countries, across U.S. age groups, across library card holders and non-card holders. "The library brand is dated." Again, our survey findings do not surprise, they confirm.

We collected over 20,000 open-ended responses from information consumers. This bank of data represented a valuable source of unedited views about users' perceptions, thoughts and attitudes about libraries and electronic resources. The respondents provided over 3,000 statements of advice for libraries. They cover everything from content, to community, to coffee and conversation. We have worked hard to incorporate as many of these views and ideas as possible and to provide a balanced view of their comments. Appendix B provides a sample of approximately 2,000 respondent comments.

Trends toward increased information self-service and seamlessness are clearly evident in the survey results. Libraries' mindshare in this new self-service e-resource environment is also clear: behind newer entrants. Libraries' continued importance as a trusted information provider is evident and, overall, users have positive, if outdated, views of the "Library." Our collective challenge is, therefore, to take this information—both the positive and the challenging—and evaluate where to invest more, invest less, invent new and invert old, communicate more and market better.

Cathy De Rosa
Vice President, Marketing & Library Services

Introduction

Methodology

OCLC Market Research staff defined a research project to look at library resource use, perceptions and impressions of libraries, and people's preferences for using information discovery tools. OCLC commissioned a blind survey of information users from Harris Interactive Inc. Harris drew a sample of potential respondents from the Harris Poll Online panel consisting of millions of individuals worldwide. The respondents were interviewed between May 20 and June 2, 2005. Target respondents ranged from young people age 14 to people age 65 and older.

The online survey was open to English-speaking male and female residents of Australia, Canada, India, Singapore, the United Kingdom (U.K.) and the United States (U.S.). Responses from Australian, Singaporean and Indian residents are combined and are referred to throughout the report as the geographic region of Australia/Singapore/India.

The majority of youth surveyed reside in the U.S. Respondents outside the U.S. were generally age 18 and over. The U.S. respondents' data were segmented by age to provide another perspective. The sample sizes for the other geographic regions were not large enough to report by age segment.

As the poll was conducted online, all respondents are at least familiar with online resources and have access to the Internet. The survey was conducted in English, and 3,348 respondents completed the survey.

The collected data have an overall statistical margin of error of +/- 1.69 percent at the 95 percent confidence level for the online population in the countries surveyed. The online population may or may not represent the general population of each country surveyed. Based on statistics from www.internetworldstats.com, the following table shows the percentage of residents in the countries surveyed who have Internet access. The table also shows the penetration of Internet access in 2000, as an indication of its growth in the last five years.

Internet Access and Population—*by Country*[1]

Country	Population	Internet users	Penetration of Internet access in 2005	Penetration of Internet access in 2000[2]
Australia	20,507,264	13,991,612	68.2%	34.5%
Canada	32,050,369	20,450,000[3]	63.8%[3]	42.1%
India	1,094,870,677	39,200,000	3.6%	0.54%
Singapore	3,547,809	2,421,800	68.3%	32.4%
United Kingdom	59,889,407	36,059,096	60.2%	26.4%
United States	296,208,476	203,466,989	68.7%	44.1%

1. Table content is based on data at http://www.internetworldstats.com, accessed November 15, 2005.
2. World Bank, World Development Indicators, http://devdata.worldbank.org/data-query/, accessed November 15, 2005.
3. http://www.internetworldstats.com/stats2.htm, accessed November 15, 2005; data is from December 2003.

All survey data were weighted demographically, except for data from Indian respondents due to the relatively small number of respondents. In general, question wording and issues related to conducting surveys may introduce some error or bias into opinion poll findings.

Percentages in data tables may not total 100 percent due to rounding or because respondents frequently were asked to select all responses that may apply or respondents were not required to answer the question.

Eighty-three questions were asked of the 3,348 respondents. The survey included a series of branching questions such that responding either *yes* or *no* to a question led to a series of follow-up questions. The survey also asked open-ended questions to ensure that respondents had the opportunity to provide input in their own words. Several of the following parts include samples of the verbatim comments. The comments are included as written by the survey respondents, including misspellings and grammatical errors.

It is not possible to provide all the data or the over 20,000 verbatim responses collected from the survey in this report; however, results are presented for all major topics explored in the survey, and 10 percent of the verbatim comments are provided in Appendix B as these will be rich sources of information about what is on the minds of respondents with regard to their libraries.

Once the survey was complete, the OCLC Market Research team analyzed and summarized survey results in order to produce this report. In addition to presenting the analyses of the survey data, team members did correlation analyses on several of the interrelated questions to elicit additional value from the results and these are included in the report.

Throughout the report, the phrase "information consumer" is used, as it was in *The 2003 OCLC Environmental Scan,* to refer to people who seek, ingest and sometimes purchase information.

The survey results show that information consumers are familiar with libraries. Nearly all survey respondents have visited a library in the past. Survey respondents were asked to indicate the type of libraries they have visited. Ninety-six percent of respondents have visited a public library.

Respondents were asked to identify the library that they use primarily (e.g., public, college/university, community college, school, corporate, other) and were asked to answer all library-related questions with that library in mind.

"College students" is used in the report to refer to postsecondary students, both graduate and undergraduate, responding to the survey; these students reside in all geographic regions surveyed.

The term "library card holder" is used in the report to refer to those respondents throughout all geographic regions surveyed who indicated that they are registered users of a library.

Total Respondents to the OCLC Survey—
by Geographic Region

Geographic Region	Number of Respondents
Australia/Singapore/India	535
Canada	491
United Kingdom	468
United States	1,854

Source: *Perceptions of Libraries and Information Resources,* OCLC, 2005.

Total U.S. Respondents—*by Age of Respondent*

U.S. Ages	Number of Respondents
Age 14-17	621
Age 18-24	403
Age 25-64	449
Age 65 and older	381

Source: *Perceptions of Libraries and Information Resources,* OCLC, 2005.

Total College Students—*by Age of Respondent*

The survey included 396 college students, both undergraduate and graduate, from all geographic regions included in the study. This table shows the breakdown of college students by age group.

College Student Ages	Percentage of College Students per Age Range
Age 14-17	3%
Age 18-24	65%
Age 25-64	31%
Age 65 and older	0%

Source: *Perceptions of Libraries and Information Resources,* OCLC, 2005.

Total Library Card Holders—*by Geographic Region*

The survey asked respondents to indicate if they are registered users of a library. This table shows the percentage of registered users by geographic region.

Geographic Region	Percentage of Library Card Holders
Australia/Singapore/India	71%
Canada	71%
United Kingdom	59%
United States	75%

Source: *Perceptions of Libraries and Information Resources,* OCLC, 2005, question 805.

Report Structure

This report is structured to provide readers with a sequenced view of how the information consumer finds, uses, evaluates and favors information resources, including physical and online libraries. The findings are presented in five parts, not in the order in which the survey tool presented them, but in such a way as to categorize the actions, attitudes and brand values of respondents.

Part 1, Libraries and Information Sources—Use, Familiarity and Favorability, reviews respondents' familiarity and use of libraries and information, as well as the information sources that are most frequently selected and used by survey respondents. We explore respondents' favorability toward information resources. For purposes of this report, we categorized questions into three groupings— information sources, electronic resources and information brands—that are used in subsequent parts of the report.

We asked questions about five places, physical and virtual, that respondents use to search for information and content. These we refer to as **information sources** and they are:

- Search engines
- Libraries
- Bookstores
- Online libraries
- Online bookstores

information
sources

We asked questions about the kinds of electronic resources respondents are familiar with and use to get information. These we refer to as **electronic resources** and they are:

- Search engines*
- Online bookstores*
- Electronic magazines/journals
- Electronic books (digital)
- Topic-specific Web sites
- Instant messaging
- E-mail information subscriptions
- Online librarian question services
- Library Web sites
- Online news
- Blogs
- Online databases
- E-mail
- RSS feeds
- Ask-an-expert services
- Audiobooks (downloadable/digital)

electronic
resources

* Search engines and online bookstores are included as both information sources and electronic resources.

We asked questions about respondents' perceptions of, attitudes toward and familiarity with well-known information sources and resources associated with them. These we refer to as **information brands**. The branded sources are:

information brands

- About.com
- AllTheWeb.com
- AltaVista.com
- AOL Search
- Ask an expert (e.g., Homework Helper)**
- Ask Jeeves.com
- Clusty.com
- Dogpile.com
- Excite.com
- Gigablast.com
- Google.com

- HotBot.com
- iWon.com
- Library Web sites**
- LookSmart.com
- Lycos.com
- MSN Search
- Netscape Search
- Online librarian question services (Ask a librarian)**
- Teoma.com
- Yahoo.com

**Ask an expert, library Web sites and online librarian question services are not brand names, they are electronic resources. They are included as choices in order to contrast respondents' perceptions and attitudes about information brands with their perceptions and attitudes about libraries.

Part 2, Using the Library—In Person and Online, reports on what we discovered about how information consumers are using libraries and how newer information sources, electronic resources and information brands are impacting and influencing the behaviors of respondents.

Part 3, The Library Brand, explores the "Library" brand, looking closely at traditional brand determinants such as positive and negative attributes, trust, price and lifestyle fit. We report the findings about top-of-mind perceptions of libraries among respondents, as well as perceptions about the purpose, or brand potential, of libraries.

Part 4, Respondents' Advice to Libraries, provides unedited views and advice about libraries' services, resources and facilities. Respondents were generous with their advice—over 3,000 responses were submitted—and many were clearly knowledgeable about libraries and their services, as evidenced by their choice of words. Appendix B includes a sample of 10 percent of the verbatim responses.

Part 5, Libraries—A "Universal" Brand?, looks at the consistency and uniformity of responses across all geographic regions surveyed. The consistency of stated perceptions, attitudes and practices suggests the "Library" brand is both local and universal.

The **Conclusion** summarizes the findings outlined in the report.

**Appendices** provide additional supporting data tables and sample verbatim responses.

About OCLC gives an overview of OCLC, including the vision and key products, partnerships and research projects.

Related OCLC Research and Reports

In 2002, OCLC commissioned Harris Interactive Inc. to conduct a study of U.S. college students age 18–24 and their usage of the Internet and its resources. The resulting report, *OCLC White Paper on the Information Habits of College Students,* concentrated on the Web-based information habits of college students, particularly their use of campus library Web sites. This study found that college and university students looked to campus libraries and library Web sites for their information needs and that they valued access to accurate, up-to-date information with easily identifiable authors. They were aware of the shortcomings of information available from the Web and of their needs for assistance in finding information in electronic or paper formats. To access the results of this study, visit the OCLC Web site at: **www.oclc.org/research/announcements/2002-06-24.htm**

Five-Year Information Format Trends, released in early 2003, provides a snapshot look at how trends and innovation in information formats (e.g., Web pages, electronic books, MP3 audio) create new challenges and opportunities for librarians, who must integrate new formats with existing formats and build new information management processes while balancing resource allocation. To access the report, visit the OCLC Web site at: **www.oclc.org/reports/2003format.htm**

The 2003 OCLC Environmental Scan: Pattern Recognition report was published in January 2004 for OCLC's worldwide membership to examine the significant issues and trends impacting OCLC, libraries, museums, archives and other allied organizations, both now and in the future. The *Scan* provides a high-level view of the information landscape, intended both to inform and stimulate discussion about future strategic directions. To access the *Scan,* visit the OCLC Web site at: **www.oclc.org/reports/2003escan.htm**
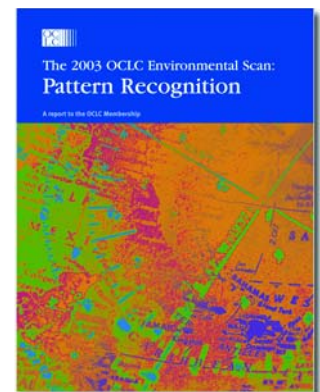
2004 Information Format Trends: Content, Not Containers returned to the subject of information format management introduced in the *Five-Year Information Format Trends* report of 2003. The report examined the "unbundling of content" from traditional containers (books, journals, CDs) and distribution methods (postal mail, resource sharing). As the boundaries blurred among content, technology and the information consumer, the report showed how format was beginning to matter less than the information within the container. To access the report, visit the OCLC Web site at: **www.oclc.org/reports/2004format.htm**