What were we not noticing in 2003?
High school student: The technology I want the most is…
“A PDA device that contains all the information I need to do my work.”

“Wherein lies new tone today?”

2003

Staff 53%
Print 27%
Other 17%
eContent 3%

Last minute addition to the “Scan”

Gamers fastest growing company

eBay

Permanently Plugged In

Kids today are inundated with technology. Gaming and messaging have fundamentally changed behavior—and maybe brains, too.

Gaming

Electronic games have grown up along with today’s youth. As a full-blown entertainment medium, games are now more popular with many teenagers than movies or TV.

Players by gender

Best sellers

Players at the first choice

Electronic entertainment

© 2003 OCLC Online Computer Library Center
The first “Perceptions” report
1. Online was cool, for youth
2. Search engines win
3. Libraries = books
4. 1% start an information search on a library website
5. Library use is expected to be flat into the future
The Information Consumer 2005

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?
The 2009 word of the year
The 2009 word of the year: tweet

American Dialect Society
The 2010 word of the year

American Dialect Society
The 2010 word of the year is **app**.

American Dialect Society
The word of the decade
The word of the decade

Google

American Dialect Society
Online consumer survey

2,229 Respondents

60% United States

22% United Kingdom

18% Canada

Age 14-17
28%

Age 18-24
26%

Age 25-64
28%

Age 65 and older
18%

95% +- 2.7%
“What haven’t we had time to notice?”

2010

Uses of library funds
- Staff: 49%
- Print: 19%
- eContent: 17%
- Other: 15%

3D PRINTING
Context and Community
Technology in the United States

Facebook grew to 152 million U.S. unique monthly visitors

239 million Americans are online

E-book sales grew to $345 million

Google grew to a 66% share of U.S. searches

Public libraries grew to 82%

Mobile access to the Internet doubled to 18% of Americans
85% of adults own a cell phone.

75% of teens own a cell phone.

88% of teens use cell phones to text, 54% daily.

(Oct 2010 Pew Report)
Library technology in 2010

44% of academic libraries and 34% of public libraries offer mobile services.

7 out of 10 public libraries report they are the only free source of computer and Internet access for their communities.
I’m not so impressed anymore.
Everything is a little less shiny...

- Search engines
- Online library (website)
- Physical library
- Online bookstore
- Physical bookstore

10% drop in favorability

All information sources viewed less favorably.
During the Great Recession...

More jobs were lost than gained.

The unemployment rate more than doubled.

Source: U.S. Bureau of Labor Statistics
20% have been economically affected

- Laid off from job, still unemployed
- Increased hours of work to make ends meet
- Reentered the work force
- Working more than one job to make ends meet
- Received a reduction in pay at current employer
- Laid off, took another job with lower pay
- Laid off, took another job with same or higher pay

72%
Over 1/3 of American families have experienced a negative job impact
The Great Recession

Adults 25-45 impacted most

- 64% Impacted
- 28% Not impacted
- 8% Other
Tradeoffs

- 86% decreased for Dining out
- 82% decreased for Apparel
- 80% decreased for Entertainment
- 74% decreased for Vacations
- 53% decreased for Appliances

5% increased for Dining out
4% increased for Apparel
5% increased for Entertainment
5% increased for Vacations
5% increased for Appliances
Tradeoffs

Library use increased 37%

- Dining out decreased 9%
- Apparel increased 4%
- Entertainment increased 5%
- Vacations increased 5%
- Appliances increased 5%
- 74%
- 80%
- 82%
- 86%
Libraries fill the gap

76% have reduced spending on books, CDs and DVDs.

75% who use the library more borrow books, CDs and DVDs instead of purchasing.

Library usage has increased.

ECONOMICALLY IMPACTED

Consumer spending has decreased.

ECONOMICALLY IMPACTED
Economically affected Americans join up
Public library visit frequency is stable

Visited the library at least

\textit{once weekly}

13\% \quad 12\%

\begin{tabular}{|c|c|}
  \hline
  2005 & 1\% \\
  2010 & 1\% \\
  \hline
\end{tabular}
Economically affected people are visiting libraries more frequently

Visited the library at least once weekly

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
</tr>
</thead>
<tbody>
<tr>
<td>1%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2010 U.S. Employment Status Not Impacted

2010 U.S. Employment Status Negatively Impacted

1% daily

3% weekly
#1 reason for increased library use...

To save money.
Borrowing is up...

<table>
<thead>
<tr>
<th>Service</th>
<th>2005</th>
<th>2010</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrow print books</td>
<td>53%</td>
<td>59%</td>
<td>11%</td>
</tr>
<tr>
<td>Borrow DVDs/videos</td>
<td>31%</td>
<td>36%</td>
<td>16%</td>
</tr>
<tr>
<td>Read/borrow best-seller</td>
<td>39%</td>
<td>43%</td>
<td>10%</td>
</tr>
<tr>
<td>Leisure reading</td>
<td>44%</td>
<td>45%</td>
<td>2%</td>
</tr>
</tbody>
</table>
...but use of research resources is down

Research specific reference books

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>48%</td>
</tr>
<tr>
<td>2010</td>
<td>38%</td>
</tr>
<tr>
<td></td>
<td><strong>21% DECREASE</strong></td>
</tr>
</tbody>
</table>

Get assistance with research

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>39%</td>
</tr>
<tr>
<td>2010</td>
<td>28%</td>
</tr>
<tr>
<td></td>
<td><strong>28% DECREASE</strong></td>
</tr>
</tbody>
</table>
### Increased use by 7,000,000 people

<table>
<thead>
<tr>
<th>Activity</th>
<th>Economically Impacted</th>
<th>Not Impacted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing the Internet for free more often</td>
<td>35%</td>
<td>14%</td>
</tr>
<tr>
<td>Using the computer more often</td>
<td>28%</td>
<td>12%</td>
</tr>
<tr>
<td>Accessing free Wi-Fi more often</td>
<td>24%</td>
<td>9%</td>
</tr>
</tbody>
</table>
First-time library use...

U.S. economically affected

- Using the computer
- Seeking unemployment information
- Seeking job/career information
- Attending a meeting/community event
- Attending child-related events
- Attending professional/career development/training
- Applying for local, state or federal aid (excluding unemployment)
- Reading magazines
- Accessing the Internet for free
- Seeking assistance to prepare/update resume
- Using it as a place to think about my future
- Seeking public assistance information
- Borrowing books, CDs, DVDs, etc.
Research about the Information Consumer
• **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 94% of Americans, search engines by 92%
  – 66% now use social networking sites

---

**Facebook** was the most popular website in 2010, surpassing Google for the first time!

---

2010 Share of Website Visits

<table>
<thead>
<tr>
<th>Website</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>8.93%</td>
</tr>
<tr>
<td>Google</td>
<td>7.19%</td>
</tr>
<tr>
<td>Yahoo! Mail</td>
<td>3.52%</td>
</tr>
<tr>
<td>Yahoo!</td>
<td>3.30%</td>
</tr>
<tr>
<td>YouTube</td>
<td>2.65%</td>
</tr>
</tbody>
</table>

*Source: Hitwise.com*
Where do you begin an information search?

- Search engine
  - 2005: 82%
  - 2010: 84%

- Library Website
  - 2005: 1%
  - 2010: 0%

- Wikipedia
  - 2005: NA
  - 2010: 3%
Library website use

U.S. Respondents

- 2010: 33%
- 2005: 31%
Where do college students begin an information search?

- **Search engine**
  - 2005: 92%
  - 2010: 83%

- **Library**
  - 2005: NA
  - 2010: 7%

- **Website**
  - 2005: 1%
  - 2010: 0%

- **Wikipedia**
  - 2005: NA
57% of US college students use the library website, down from 2005.
#1 reason for not using library sites
U.S. Respondents

39%

“I did not know the website existed.”
Once found, library sites are used. 14% of searchers who start with a search engine end up at the library website... 80% of whom found what they needed.
Information from the library is...

- About the same:
  - 2005: 70%
  - 2010: 69%

- More trustworthy:
  - 2005: 21%
  - 2010: 26%

- Less trustworthy:
  - 2005: 9%
  - 2010: 5%
What is your most trusted information source?
What is your most trusted information source?

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search engine</td>
<td>22%</td>
</tr>
<tr>
<td>Expert</td>
<td>16%</td>
</tr>
<tr>
<td>Website</td>
<td>13%</td>
</tr>
<tr>
<td>Friend</td>
<td>10%</td>
</tr>
<tr>
<td>Print materials</td>
<td>7%</td>
</tr>
<tr>
<td>Teacher</td>
<td>7%</td>
</tr>
<tr>
<td>Co-worker</td>
<td>7%</td>
</tr>
<tr>
<td>Library materials</td>
<td>7%</td>
</tr>
<tr>
<td>Wikipedia</td>
<td>6%</td>
</tr>
<tr>
<td>Relative</td>
<td>3%</td>
</tr>
<tr>
<td>Librarian</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>
Where would you go for information on nutrition?

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consult a professional source</td>
<td>56%</td>
</tr>
<tr>
<td>Look it up in a book</td>
<td>18%</td>
</tr>
<tr>
<td>Ask a friend/family member</td>
<td>9%</td>
</tr>
<tr>
<td>Consult a magazine</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Consult a library</strong></td>
<td><strong>1%</strong></td>
</tr>
</tbody>
</table>
Is information trustworthy?

77% □ I just know to verify…

69% □ I check another site
Do you ask for help online?

43%  ✔  Ask an Expert

7%  ✔  Ask a Librarian
Age 14-17—Do you ask for help online?

62%  

Ask an Expert
From Digital Divide to Digital Bridge
All ages
click here
Boomers are using...

- **95%** Email
- **91%** Search Engines
- **61%** Wikipedia

- **58%** Social Media Sites
- **52%** Social Networking Sites
- **42%** Ask an Expert Sites

- **7%** Mobile Devices to Search Web
Seniors are using...

- 92% E-MAIL
- 86% SEARCH ENGINES
- 60% WIKIPEDIA

- 2% MOBILE DEVICES TO SEARCH WEB
- 40% SOCIAL NETWORKING SITES
- 34% SOCIAL MEDIA SITES
- 32% ASK-AN-EXPERT SITES
Teens and young adults are using...

- **AGE 14–17**
  - E-MAIL: 96%
  - SEARCH ENGINES: 92%
  - WIKIPEDIA: 88%

- **AGE 18–24**
  - E-MAIL: 98%
  - SEARCH ENGINES: 92%
  - WIKIPEDIA: 84%

- **Social Media Sites**
  - **AGE 14–17**: 85%
  - **AGE 18–24**: 88%

- **Social Networking Sites**
  - **AGE 14–17**: 72%
  - **AGE 18–24**: 88%

- **Ask-an-Expert Sites**
  - **AGE 14–17**: 62%
  - **AGE 18–24**: 54%

- **Mobile Devices to Search Web**
  - **AGE 14–17**: 16%
  - **AGE 18–24**: 15%
Change in use of information services by young adults (14-24) from 2005.

- Instant messaging: 15% (Age 14-17), 16% (Age 18-24)
- Library website: 5% (Age 14-17), 23% (Age 18-24)
- Blogs: 28% (Age 14-17), 58% (Age 18-24)
- Ejournals: 43% (Age 14-17), 18% (Age 18-24)
- Online databases: 44% (Age 14-17), 17% (Age 18-24)
The Brand
The Library Brand, 2005: Books, 69%
The Library Brand, 2010: Books, 75%
The Changing Face of Reading
The Changing Face of Reading
The Changing Face of Reading
The Changing Face of Reading

NANCY DREW MYSTERY STORIES

The Secret of the Wooden Lady

CAROLYN KEENE

DETECTIVE BATMAN

OCLC
The Changing Face of Reading
73% of Americans consider themselves readers
The library: a valued asset

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

<table>
<thead>
<tr>
<th>Total U.S. respondents</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>51%</td>
</tr>
<tr>
<td></td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Economically impacted</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>28%</td>
</tr>
</tbody>
</table>
The timely and timeless power of personal service.
Librarians are even more valuable...

2005: 76%
2010: 83%
2010: 88% ECONOMICALLY IMPACTED
...and so are libraries

- Increased for me: 40%
- Increased for my family: 34%
- Increased for my community: 29%

U.S. No Changes in Employment Status | U.S. Employment Status Negatively Impacted
“If you could give libraries one piece of advice...” 2005

More parking
Increase seating

Promote services

Organize facility
Add/update computers

Add to collection

Update collection

Improve environment
Offer more classes
Improve customer service

Clean/maintain

Decrease noise
Stay open

Expand facility
Improve accessibility

More inviting facility

Reexamine rules

Add titles
“If you could give libraries one piece of advice…” 2010

Extend hours

Update collection
Add titles
Add to collection

Improve environment
Clean/maintain
Decide noise
Expand facility
More inviting facility

Improve customer service
Reexamine rules

Improve accessibility
Increase seating
Promote services
Organize facility

Add/update computers
Make resources available online

More parking
Increase seating
Improve cataloging

Offer more classes

“If you could give libraries one piece of advice…” 2010
“Be there.”
Hot Spots in 2010...

1. Online is less cool, but now for everyone
2. Google
3. Libraries = BOOKS
4. No one starts info searches on the library website
5. The economy creates new value(s)
Hot Spots in 2010...

6. The library has economic value
7. Librarians are valued, even more
8. Google is our trusted source
9. Libraries are trusted, but “ask an expert” is used
10. The information network is social—is the library network?
Three things to act on 2011...

• Books
• Building(s)
• BFF
How will we **connect** our virtual real estate to our physical real estate?
7,000,000 new BFFs?

Library Card
81% of economically impacted Americans have a library card
284 1495
MEMBER SINCE 1985

Library Card
68% of nonimpacted Americans have a library card
284 1495
MEMBER SINCE 1985
“What won’t we notice in 2015?”
OCLC Cooperative ... staying connected

- NextSpace
- OCLC Cooperative eNews
- Cooperative blog
- Above the Fold
- OCLC Abstracts - weekly update
- OCLC Member Updates
- OCLC Annual Reports
- RSS feeds, listservs
- Facebook, twitter

www.oclc.org/email/subscribe
George Needham — needhamg@oclc.org