Perceptions, our Realities

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The 2010 word of the year
The 2010 word of the year:

APP

American Dialect Society
The words of 2011
The words of 2011

- Books
- Brands
- BFF(s)
The words of 2011

• Books
• Brands
• BFF(s)
OCLC Membership Reports

- 2003
- 2005
- 2007
- 2009
- 2010

Perceptions of Libraries, 2010
Context and Community

A REPORT TO THE OCLC MEMBERSHIP
Context

“in 15 minutes or less”
The Information Consumer 2005

1. Online was cool, for the youth
2. Search engines had already won
3. 1% start an information search on a library Web site
4. Libraries = books
5. Library use is expected to be flat into the future
6. We know good information when we see it
7. Librarians are valued
8. Libraries are trusted, at the same level as Google
9. The social network?
The Information Consumer 2010

What’s changed since 2005?

Turn to your neighbor, introduce yourself, and discuss (5 minutes)
A little less bragging
Everything is a little less shiny...

- Search engines
- Online library (Web site)
- Physical library
- Online bookstore
- Physical bookstore

10% drop in favorability

All information sources viewed less favorably.
20% of Americans— economically impacted

- 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
Roughly 1/3 of American families have experienced a job impact.
Tradeoffs

- Dining out: increased (5%) decreased (86%)
- Apparel: increased (4%) decreased (82%)
- Entertainment: increased (5%) decreased (80%)
- Vacations: increased (5%) decreased (74%)
- Appliances: increased (5%) decreased (53%)
Library use
increased 37%

Tradeoffs

- Dining out: 9% decreased
- Apparel: 5% increased
- Entertainment: 4% increased
- Vacations: 5% increased
- Appliances: 5% increased
- 86% decreased
- 82% decreased
- 80% decreased
- 74% decreased
- 53% decreased
The library fills the gap

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

ECONOMICALLY IMPACTED

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

Library usage has increased.

ECONOMICALLY IMPACTED
#1 reason for increase in library use...

To save money.
We will pay - bragging rights 2011
Public library visit frequency is stable

Visited the library at least once weekly

13% daily
1% once weekly
12% daily
1% once weekly
Economically impacted are visiting the library more frequently

Visited the library at least once weekly

12% U.S. Employment Status Not Impacted
1% daily

18% U.S. Employment Status Negatively Impacted
3%
Economically impacted Americans use library services more frequently.
Borrowing was up...

<table>
<thead>
<tr>
<th>Activity</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>
7 million economically impacted Americans have increased their use of technology at the library.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Economically Impacted</th>
<th>Not Impacted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing the Internet for free</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>
Borrowing up... but research is down

<table>
<thead>
<tr>
<th>Research specific reference books</th>
<th>2005</th>
<th>2010</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>48%</td>
<td>38%</td>
<td>21%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Get assistance with research</th>
<th>2005</th>
<th>2010</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>39%</td>
<td>28%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Re(search)
Where do you begin your information search?

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

- **Wikipedia**
  - 2005: NA
  - 2010: 3%

- **Library Web site**
  - 2005: 1%
  - 2010: 0%
Library Web site use

2010: 33%
2005: 31%

2010: Orange
2005: Green
#1 reason for not using the library Web site

39%

“...I did not know the Web site existed.”
Who doesn’t have a Web site?
Is information is trustworthy?

77%  I just know

69%  If in doubt... I quickly check another site
Information from libraries compared to Google

- **2005**
  - About the same: 70%
  - More trustworthy: 21%
  - Less trustworthy: 9%

- **2010**
  - About the same: 69%
  - More trustworthy: 26%
  - Less trustworthy: 5%
Do you ask for help online?

43%  Ask an Expert

62%  Ask an Expert
     Age 14-17

7%   Ask a Librarian
The words of 2011

- Books
- Brands
- BFF(s)
73% of Americans consider themselves readers.
Reading is so cool
Reading is so cool
We have moved from being “people of the books” to “people of the screen”

- Kevin Kelly

• We are all people of the screen

All ages

click here
BUT DOLLARS ARE BETTER!

CHANGE IS GOOD

- 1 LIKE
Boomers are using...

- **95%** E-MAIL
- **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 (65+)

Seniors are using...

- 92% E-MAIL
- 86% SEARCH ENGINES
- 60% WIKIPEDIA
- 40% SOCIAL NETWORKING SITES
- 34% SOCIAL MEDIA SITES
- 32% ASK AN EXPERT SITES
- 2% MOBILE DEVICES TO SEARCH WEB
Give the gift of Reading

Introducing the All-New Kindle Family

- **kindle**: $79
- **kindle touch**: $99
- **kindle fire**: $199
The words of 2011

- Books
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The Library Brand
The Library
Brand
69%
Books 75%
If you could give one piece of advice

2005

Add to collection

update collection
add titles
add to collection
organize facility
promote services
add/update computers
more parking
increase seating
improve environment
offer more classes
improve customer service
clean/maintain
decrease noise
stay open
expand facility
improve accessibility
more inviting facility
reexamine rules
What’s most important:

All respondents:
- 51% books, videos and music
- 32% makes needed information freely available

Economically impacted:
- 48% books, videos and music
- 34% a place to read
We are books
Amazon is reading
“If you could give one piece of advice...
The timely and timeless power of personal service...at the point of need
Librarians are even more valuable

76% 2005
83% 2010
88% 2010 ECONOMICALLY IMPACTED
The words of 2011

- Books
- Brands
- **BFF(s)**
7 Million new BFFs?

81% of economically impacted Americans have a library card.

68% of nonimpacted Americans have a library card.
The library: an increasingly valued community asset...

- Increased for me: 17%
- Increased for my family: 15%
- Increased for my community: 29%

U.S. No Changes in Employment Status
U.S. Employment Status Negatively Impacted
...even more valued by the economically impacted

- Increased for me: 17%
- Increased for my family: 15%
- Increased for my community: 29%

U.S. No Changes in Employment Status  U.S. Employment Status Negatively Impacted
Let’s capture the minds - we have the attention of the hearts.
Are we promoting the #1 reason for increase in library use...

Today you saved $26.17
This is a story about a mother, two daughters, and two dogs.

This was supposed to be a story of how Chinese parents are better at raising kids than Western ones.

But instead, it’s about a bitter clash of cultures, a fleeting taste of glory, and how I was humbled by a thirteen-year-old.
“Generating - value will come from uncopyable attributes generated around books instead of in copies of books.”

- Kevin Kelly

Thoughts?

- Books
- Brands
- BFF(s)