

DIGITAL CONSUMERS

reshaping the
information
profession

edited by

DAVID NICHOLAS
IAN ROWLANDS



Digital consumers

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INFORMATION
PROFESSIONS

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David Nicholas

and Ian Rowlands



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Ian Rowlands 2008

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David Nicholas and Ian Rowlands

About the contributors

Dr Tom Dobrowolski

Tom is a senior lecturer and Head of Postgraduate Studies at the Institute of Information Science and Book Studies, Warsaw University, the largest Information School in Poland. He is a founder member of the Centre for Information Behaviour and the Evaluation of Research (CIBER) and is one of its leading digital theorists. Research interests largely concern virtual collections and information networks and Tom has written more than a dozen articles with the CIBER team.

Maggie Fieldhouse

Maggie is a lecturer at the School of Library, Archive and Information Studies (SLAIS) at University College London (UCL). Her research interests are management and collection management; these developed from her previous experience as Information Services Manager at the University of Sussex Library. Current concerns are: pedagogical aspects of information literacy and the relationships between digital literacy and information-seeking behaviour.

Professor Barrie Gunter

Barrie is Head of the Department of Media and Communication, University of Leicester, where he is also Director of the Centre for Mass Communication Research. He was previously Professor of Journalism Studies and founder member of the Department of Journalism Studies, University of Sheffield, where he was Director of Research. He has written over 40 books and more than 250 journal papers, book chapters and technical reports on media, marketing and management issues. He is on the editorial boards of *The Journal of Communication*, *Journal of Broadcasting & Electronic Media*, *Human Communication Research*, *Media Psychology*, *New Media & Society* and *Trends in Communication*. He has won research grants to the value of more than £800k. Currently he is involved in research on blogging and its impact on mainstream news, the impact of new information and communication technologies in higher education, and the future of television.

Paul Huntington

Paul is a senior research fellow with CIBER at UCL. His main field of expertise is the analysis of server transactional log files. As part of a team he has pioneered techniques for the analysis and understanding of transactional log files (deep log analysis) and has been instrumental in the development of concepts and metrics related to user online behaviour. He has worked, as a member of the research team, for eight years on over 20 separate research projects spanning a variety of platforms including the world wide web, digital interactive television, mobile phones and touch screen kiosks that have generated more than a hundred peer-reviewed articles. Previously Paul worked as a researcher at City University, the University of North London and the University of Hertfordshire.

Dr Hamid R. Jamali

Hamid is an Iranian who is a researcher at UCL SLAIS and is a member of the UCL Centre for Publishing and CIBER. He recently graduated with a PhD degree in Library and Information Studies from UCL and has taken up

a lecturership at Tarbiat Moallem University in Tehran, Iran. A library and information scientist by background, his research interests cover information behaviour of scholars, use of electronic information resources and bibliometric studies. He has collaborated on the Virtual Scholar research programme run by CIBER.

Professor Michael Moss

Michael is a research professor in archival studies in the Humanities Advanced Technology and Information Institute at the University of Glasgow. He is a member of the board of the National Trust for Scotland, a non-executive director of The National Archives of Scotland and a member of the Lord Chancellor's Advisory Council on National Records and Archives. His recent publications include 'Choreographed encounter – the archive and public history', *Archives*, vol. xxxii, no. 116, 41–57, 2007; with Alistair Tough as editors, *Record Keeping in a Hybrid Environment: managing the creation, use and disposal of unpublished information objects in context*, Chandos Press, 2006; and with Laurence Brockliss et al. as editors, *Advancing with the Army: medicine, the professions and social mobility in the British Isles 1790–1850*, Oxford University Press, 2006.

Professor David Nicholas

David is the Director of UCL SLAIS. He is also the Director of the UCL Centre for Publishing and a Director of the CIBER research group. He is a member of the British Library Research Board and editor of *Aslib Proceedings*. Research interests largely concern the Virtual Scholar, about which he has published more than a hundred peer-reviewed articles. He has been the principal investigator on nearly 30 projects totalling more than £1,500,000 in value and is currently engaged in investigations of: usage statistics (US Institute of Museums and Library Services), the use and impact of e-journals (for the Research Information Network) and e-books (for the Joint Information Systems Committee – JISC), and open access publishing (for OUP).

Dr Ian Rowlands

Ian is Reader in Publishing at UCL SLAIS and an active member of the UCL Centre for Publishing and CIBER. An information scientist by background, he has maintained a steady interest in the policy aspects of libraries, publishing and new technology for 20 years, working in a variety of settings including industry, consultancy, policy studies and the academy. He recently led the successful 'Google Generation' project for the British Library and JISC, around which his contribution in this volume is based.

Chris Russell

Chris is a founding Director of eDigitalResearch with responsibility for business development, account management and financial operations. The company was founded in 1999 and was created in response to identifying a niche market as numbers of internet companies were rapidly increasing with little appreciation of usability and customer experience issues. Chris has a business degree from Kingston University, and on graduating, he moved into sales and marketing for Smiths Foods and British American Tobacco and later formed his own company in 1986. He has worked for numerous blue-chip companies, including B&Q, BT, thetrainline.com and Comet. These commissions have given him a unique view of the UK digital consumer and the e-shopper in particular. Chris is also a member of CIBER, a Senior Visiting Fellow at UCL and helped to design the Digital Consumers course, which is taught to UCL students.

Peter Williams

Following a successful teaching career which took him to Egypt, Spain and Brazil, Peter has spent the last 12 years investigating the use of ICT applications in the fields of education, health, and the news media. He has worked at City University, the University of East London (UEL), and UCL, where he has returned as research fellow after completing an ESRC-funded project at UEL. This looked at exploiting ICT to help adolescents with learning disabilities with basic skills, communication and self-advocacy. His other work has included

evaluating charitable websites designed to help vulnerable youngsters and working with the new media department of a regional newspaper as part of his early research into how journalists were exploiting the internet. He is currently examining how scholars and other eminent people create/acquire, manage and archive digital information. Peter is the lead author of over 40 journal articles and a book.

Richard Withey

Richard has recently stepped down as global director of interactive media for Independent News & Media PLC (INM), a position held since May 2002. He joined INM to set up Independent Digital, the digital publishing arm of Independent News & Media, in June 1999. This followed 12 years at News International, where for seven years he was director of new media, formulating the overall strategy for the successful launch on the web of titles such as *The Times*, *The Sunday Times* and *The Times Educational Supplement*, as well as investing directly or through joint ventures in a number of new media start-ups and publishing ventures. He has wide experience of the digital world having built and sold databases and online retrieval systems in the public and private sectors before joining News International in 1987, including three years as Head of Information Services for the Institute of Management. Until recently he was chairman of the Newspaper Licensing Agency. He is a Fellow of the Royal Society of Arts. Richard holds an Honorary Fellowship at UCL, where he is also a Director of CIBER.

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1

The digital consumer: an introduction and philosophy

DAVID NICHOLAS
IAN ROWLANDS
RICHARD WITHEY
TOM DOBROWOLSKI

We have chosen the title of this book with care, adopting the more general ‘digital consumer’ rather than the more specific ‘digital information consumer’ descriptor in recognition of the fact that, although the book focuses on the behaviour of people visiting the virtual space for information, the internet has redefined and widened the information domain. Because the internet is an encyclopedic, multi-purpose platform that people use, rather like a superstore, to obtain a whole range of things (often at the same time), it is now almost impossible to say what information is and what it is not, what is information seeking and what is not. Being a digital consumer does not simply mean choosing or buying e-documents or information services. Information is also fundamental to the process and success of e-shopping. As Chris Russell in Chapter 3 explains, first a person is a digital information consumer and then an e-buyer. Thus people shopping at the John Lewis e-store will be using the internal search engine to find what they want, navigating through the site employing browsing menus and opening another window on a cross-comparison site to make sure they are getting value for money. It is not surprising therefore that looking for information is one of the two most common web activities – the other is e-mail; the digital consumer is essentially an information consumer. There is another reason for employing the more general form of the descriptor and it is because

information seeking is not conducted in a vacuum and many factors shape it. Therefore it is important that it is embedded in a wider world of e-publishing, e-shopping and communication theory.

Why this book now?

Because this book is a first, it fills a yawning gap in our professional knowledge and shows us how we can overcome an insularity that is plainly an obstacle to professional development. Amazingly, despite the fact that we are ten years into an information consumer revolution occasioned by the arrival of the internet, which is changing society, education and commerce on a massive and global scale, this is the first time, as far as we can discover, that information or digital consumers have figured in a book title issued by a publisher providing books for the information professions. Why is this the case when digital consumers worldwide can be numbered in their billions and are rapidly transforming the information landscape through their preference for search engines, dislike of paying for information, and short attention spans? Why is this so when the core information professions – librarianship, archives and records management, publishing and journalism – have been rocked, and, in some instances, derailed, by the digital transition? There are in fact a number of possible explanations, that we shall reflect on throughout this introduction, but the main reason is, probably, that information professions are insular and tribal (something particularly true of librarians) and what happens outside their strictly defined discipline boundaries are not their prime concern, even though the user and internet are busy blowing up and redrawing these boundaries. The once neat demarcation lines that existed between the information professions are becoming obscured as information consumers use their new-found freedom to relocate themselves and their activities in the virtual information space, and take on much of the work previously undertaken by information professionals. This is creating a degree of inter-communal strife, with particularly fierce disputes breaking out between publishers and librarians. These are fiercest in the scholarly communication field, where the introduction of open access and institutional repositories are close to

bringing the two communities to blows. E-books, rest assured, are also going to usher in further territorial disputes and skirmishes, with publishers and librarians once again fighting for the spoils, mortally wounding the loser in all possibility.

A second reason is that the digital consumer is now King, and the communication and delivery channels that have opened up are the King's Horses but you would hardly know this from the responses of many information professionals. Indeed, when we first used the term 'consumer' at a conference a few years ago now a number of participants took issue with the term. Their users, customers and clients, which is what they preferred to call them in a misguided attempt to show respect, were not consumers they said, as though this was a form of abuse. It is true that this no longer happens, although people still look rather uncomfortable when we mention the term. But of course in a world where access to information is a key democratic right and leveller, it is not so easy to criticize; political correctness cramps their style. However, the complainants have moved on and there is now a negative reaction when we make comparisons with the e-shopper. Indeed, when it was first mentioned that we would be including a chapter on the e-shopper in this book the reaction could be summarized as 'What the hell does this have to do with libraries, archives, etc.?' Our answer was 'A hell of a lot' as readers of this book will see for themselves, because consumers are now being offered ultimate choice in all aspects of their lives, the effect of which has been rapidly to dismantle the barriers between disciplines, be they professional, social or recreational. Connected consumers now have access, at any time of the day or night, through multiple devices and platforms, to all aspects of their information needs. If the traditional 'gatekeeper' is not there (at best) or gets in the way of this communication (at worst), consumers will abandon them and go their own way. This key aspect of the digital revolution applies to all members of the communication and information food chain, and we ignore it at our peril. There is a real risk of libraries becoming decoupled from the user.

Meeting the needs of a user community increasingly well connected by Facebook, LinkedIn, MySpace and Twitter will not be easy, and it is certainly best approached by thinking about its needs in an entirely different

way, which is the kernel of this book. The days of users as supplicants are pretty much over, and thinking about their needs as consumers is a key step-change in delivering the right services. However, few people have confronted the hard truth that their users are no longer in their grip, some have flown away and many new ones have arrived, and the majority of them now use information resources remotely and anonymously. Worryingly, while most people in the information professions are alert to the technical changes that have taken place in the virtual information space, when it comes to users many are going about their business as though nothing really fundamental has happened. Of course, information professionals have been bleating on about 'users' since time immemorial, but they have not really made that much progress in understanding them, certainly not their behaviour at the coal-face. It is almost as if by mentioning the term or having a conference, that this assuages the guilt. Thus, for instance, how many libraries (or publishers for that matter) have a department dedicated to following users' every move and relating that directly to academic outcomes and impacts? How many engage, even at the most basic level, with the kinds of sophisticated market research and demographic profiling that are behind the success of many of the UK's leading retailers or service providers? The answer is, none that we know of, and this is seriously worrying given that to succeed in the information business we need to follow the (anonymous) users' every move; they are after all driving all the major changes in the digital information environment. The big challenge here for us all is in understanding and accommodating the concept of the digital consumer. Failure to do this will result in eventual professional melt-down, the signs of which are already there for all to see.

This then is a book about information users, but not users as we once knew them. They are looking for information, yes, but also for goods, services, new experiences, titillation, excitement and entertainment. These consumers, numbered in their billions, are global 24/7 shoppers. They are the elephant in our room. This is a book for those people that want to believe that what they are doing is relevant to the information age in which we find ourselves, want to be in the fast lane and it is especially for those who lack recognition or long for a sense of purpose or mission.

The third reason why this book is badly needed is because the time has come for all the information professions to re-examine their core values and discipline boundaries, and it has to be said that they have been very slow in doing this. That is why, in an information-rich and information-driven world where there should be plaudits (and not threats) for the information professions, they find themselves challenged and, increasingly, isolated from the main action. The professional responses as determined by information policies, publications and professional education have to be regarded as wholly inadequate. Disintermediation (loosely defined and understood as ‘cutting out the middleman’), of course, has left many professionals in a state of shock and denial regarding the benefits that it has delivered – a society in which everyone is waking up to the critical importance of information and finding it. Disintermediation has triggered an information-seeking frenzy on a truly massive scale.

The world has totally changed but we are still relying on belief systems from another age – this is most evident in the information-seeking models we work with. The textbooks and professional tomes produced now are little different than those published five or ten years ago, yet our professions have been turned upside down, inside out. Let us not kid ourselves, the information landscape has been totally transformed. Google now channels millions and millions of people to the information they need, on a scale that dwarfs any library, publishing or newspaper effort. The tail (the retrieval system) is wagging the dog to within an inch of its life.

The prime purpose of this book is to reconnect information workers/providers, from all walks of life, with their user base by putting forward a belief system that will help people understand, engage, relate to each other and survive in a ubiquitous information environment, where information professionals and knowledge providers are no longer the dominant players nor, indeed, the supplier of first choice. Short of appropriate consumer theories, visions and a robust and appropriate evidence base there is a danger that the information professions are becoming increasingly rudderless and estranged from their users and paymasters. The warning signs are already there. Public libraries appear to be in real trouble and academic libraries risk being decoupled from their user

base as users continue to flee the physical space. And even the mighty scholarly publishing industry is coming under pressure from the emergence of open access publishing models and institutional repositories.

What is most concerning is that, despite the obvious writing on the wall, too many people are still attempting to defend traditional turf or territory and an obsolete information paradigm. Unfortunately, the majority belong to the library profession. The core realization has to be that the new model for the information/knowledge economy is not being reflected in the institutions that support it, including professional, educational and commercial ones. By widening the information embrace, this book introduces the wider information community to solutions they are seeking, or will be shortly. The book puts forward solutions now for problems that, while only just emerging, are being recognized as potentially cataclysmic for the whole information community.

This book is dedicated to all aspects of information-users-cum-consumers, and it is unique in this respect. Their rapid emergence in the virtual world requires us all to junk much of the intellectual baggage we have acquired over the years regarding use, users and information seeking. This baggage is an impediment to meeting the needs of today's information consumers by means of appropriate and attractive information services. We are lumbered by information-seeking theories and models produced in a hard-copy environment back in the 1980s and 1990s. Do we honestly believe that anything developed then on the back of several dozen people in a particular physical space more than ten years ago has any relevance to what happens today? In this book we blow the whistle on such notions, their time is up.

What makes it even more essential that we learn everything there is to know about the digital consumer is because all their activities take place anonymously in the virtual space and there are a large number of people using digital services information professionals have never encountered before and never will. Therefore, the need to peer into the virtual space, to find out what is going on is so pressing and obvious it is hardly worth saying, except that not enough people do it regularly enough. It is hoped that this book will start people looking by showing what can be seen and how it is best viewed.

The authors and their approach

There are too many authors and conference speakers who peddle visions of a digital future, typically on the basis of no evidence at all. They are the PowerPoint Puff evangelists. This book, despite its novelty, is not in the business of fantasizing; nor is it simply about tomorrow. It is mainly about today because the real problem is not what tomorrow will bring but what today has already brought with it. The beliefs and concepts propounded here in this book are built on a massive evidence base, whether they come from logs, surveys, interviews and focus groups, or the peer-reviewed literature. We do peer into the future at the end of the book but Barrie Gunter does this purely in the context of the research evidence.

The topic demands an interdisciplinary approach for all the reasons previously mentioned and this is provided by a group of authors whose subject strengths between them include psychology (Gunter), media studies (Gunter), journalism (Withey, Gunter and Nicholas), computer science (Dobrowolski and Huntington), information science (Rowlands and Jamali), librarianship (Nicholas, Dobrowolski, Jamali and Fieldhouse), history (Moss), archives (Moss), scholarly communication (Nicholas, Rowlands and Huntington), education (Williams), consumer health (Nicholas, Huntington and Williams), e-commerce (Russell), marketing (Russell) and publishing (Nicholas and Rowlands). The book also hopes to avoid the fragmentation that is so often found in edited, interdisciplinary books, because all the authors know each other, have worked and researched together and respect and understand each other's contribution in the field. All are connected in some way or another to the Centre for Information Behaviour and the Evaluation of Research (CIBER) (www.ucl.ac.uk/slais/research/ciber/) research group that has pioneered digital consumer research. Furthermore, Nicholas, Huntington, Gunter, Withey, Williams and Russell teach on a course called Digital Information Consumers, taught to Information Management undergraduates at University College London (UCL), where many of the ideas presented in this book were developed. Even so, there is diversity and overlap in the offerings of the contributors and this is the inevitable (and welcome) outcome of dealing with a global and fast-changing phenomenon – the like

of which has not been witnessed before. Each chapter can be read as a self-contained piece.

Chapters and contributors

Richard Withey sets the stage in Chapter 2, 'The digital information marketplace and its economics: the end of exclusivity'. He provides the essential environmental context for the book by showing how business models that have long supported the information industry are undergoing seismic change, and argues that those who ignore this do so at their peril. He explains that the exclusivity created by the ownership of the printing press is over and that this matters a lot for the information professions. He utilizes his long experience of being a senior executive in the digital information business to make his point with some authority. Chris Russell, one of the country's leading e-commerce analysts, in Chapter 3 'The e-shopper: the growth of the informed purchaser' also provides an essential context for the understanding of the digital consumer. He does this by providing a deep and authoritative insight into the behaviour of digital shoppers and the factors that have shaped their behaviour. E-commerce and e-shopping have led the way and are dominant and pattern-forming activities in the virtual environment and have helped shape the behaviour of the digital information consumer. Usually one and the same person, where the e-shopper goes, the information consumer follows and Chris helps point us to where things are going and what we can expect down the line. For many readers this will represent their first contact with e-shopping concepts and data.

Michael Moss examines the theories that are emerging from all the changes that we are witnessing. He argues that we need to wake up to the realities of the arrival of the second digital revolution that is being colonized by other disciplines with theory and rhetoric that address its far-reaching implications for the way we live and do business. He also argues we should not ignore previous information revolutions, such as the development of printing in 15th-century Europe, and, perhaps more importantly, the long preoccupation with information and its adjuncts in European thought, stretching back to classical times. Barrie Gunter, in Chapter 5 'The

psychology of the digital information consumer', provides us with an understanding of human behaviour online. The rules of online interpersonal and human-computer interaction can provide important insights into what lies behind information-seeking behaviour and how to utilize more effectively, and how to design more user-friendly, online communications systems. Psychology rarely figures in the professional literature and this chapter will provide an invaluable introduction to what it can offer to our understanding of the digital information seeker.

At the heart of the book are two research-led chapters on digital information seeking in a virtual environment. The first, 'The information-seeking behaviour of the digital consumer: case study – the virtual scholar' by David Nicholas, Paul Huntington, Hamid R. Jamali and Tom Dobrowolski is the most extensive evaluation of the digital consumer's information-seeking behaviour ever presented. It represents the first airing of CIBER's comprehensive digital information-seeking model, with its 13 individual traits. This is a model that takes cognizance, unlike other models, of the fact that most information seeking in a scholarly environment will soon be virtual. Chapter 6 also discloses the details of the digital footprint that provides the data that populates the model. Chapter 7 by Peter Williams, Ian Rowlands and Maggie Fieldhouse, looks at the information behaviour of young people, commonly referred to as the 'Google Generation', and reviews the available evidence as to whether young people, especially the young scholar, will augur a wholly new way of seeking for information. The thrust of this chapter is that consumer traits conveniently attributed to the young are in fact now mainstream for all ages: it is simply insufficient for information professionals to serve out their time until retirement hoping that it will be someone else's problem. The future is now. In fact the future was five years ago, just nobody noticed. This chapter constitutes the first general release of data from the widely acclaimed Google Generation report (www.ucl.ac.uk/slais/research/ciber/downloads/).

The penultimate chapter sees Barrie Gunter identifying changes in the pipeline that might impact on the digital consumer. He explains that digital information consumers will soon have even more choices to make than ever before in terms of sources of information about commodities and services.

They will also more readily become producers as well as consumers in the digital world with the spread of digital equipment and off-the-shelf tools that enable them to upload their own content online. The rapid evolution of new information and communications technologies will lead to even more shrinkage in the time-lag between innovation launch and reaching a critical mass or ‘tipping point’ beyond which they spread dramatically from early adopters to the general population.

The final, short chapter is one that we owe to the information community who we all believe have an important and valuable contribution to make in the new information world we are being fast-forwarded to. That is, providing they take on board all that we are saying! To assist in this, we have itemized and prioritized, executive summary style, the essentials.

Intended audience

As mentioned earlier, this book has been published to address widespread concerns being felt by all the information professions – librarians, publishers, journalists and archivists. Of course, many authors will say this in the hope that their sales will receive a boost as a consequence, but we have very good reasons for believing this to be true. The internet has thrown all the individual professions together and they now have much in common and in many cases the user is the same virtual person. However, it is undoubtedly librarians who are currently under the cosh and for them this book should be regarded as an essential survival kit. Because the book sets about the task of changing professional mindsets and because this is easier done with students, who, by definition, should be less set in their ways, we clearly hope that they will read the book in great number and help spread the consumer message.

Knowledge transfer is the current buzz phrase in academe and this book ticks all the right boxes in this respect. We are moving research findings into the practitioner environment, sharing relevant information amongst the information professions. This is the first time these findings have been placed in the professional mainstream and brought together in the form of a professional manual or manifesto.