



# iCONN Market Survey

## Presentation of Key Findings

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# About CSRA

## (Center for Survey Research and Analysis)





# CSRA - General Information



**The Center for Survey Research and Analysis (CSRA) is a non-profit, non-partisan, academic survey research facility dedicated to the study of public opinion**

**Part of the University of Connecticut (based in Storrs)**

**Founded in 1997**

**(Previously called the Institute For Social Inquiry, founded in 1979)**





# Study Background & Methodology





# Study Background & Objectives

- ✦ **The Connecticut State Library commissioned CSRA to conduct a statewide survey to:**
  - **Collect background information on online usage and habits in the state**
  - **Measure awareness and usage of iCONN**
    - ⇒ Among those aware – how did they hear about it?
    - ⇒ Among users – how satisfied are they with iCONN?
  - **Measure interest in iCONN among non-users – via a description of the service and its offerings**
    - ⇒ What offerings are most appealing?
  - **Gain some insight into how to best market iCONN**



# Methodology

**\* 500 telephone interviews were conducted across the state**

- Representative sampling – results are statistically representative of the state’s adult population**
- In-depth interviews – 15 minutes**
- Conducted in October – November, 2005**
  - ⇒ All interviews conducted by trained CSRA interviewers from our telephone facility in Storrs, CT**



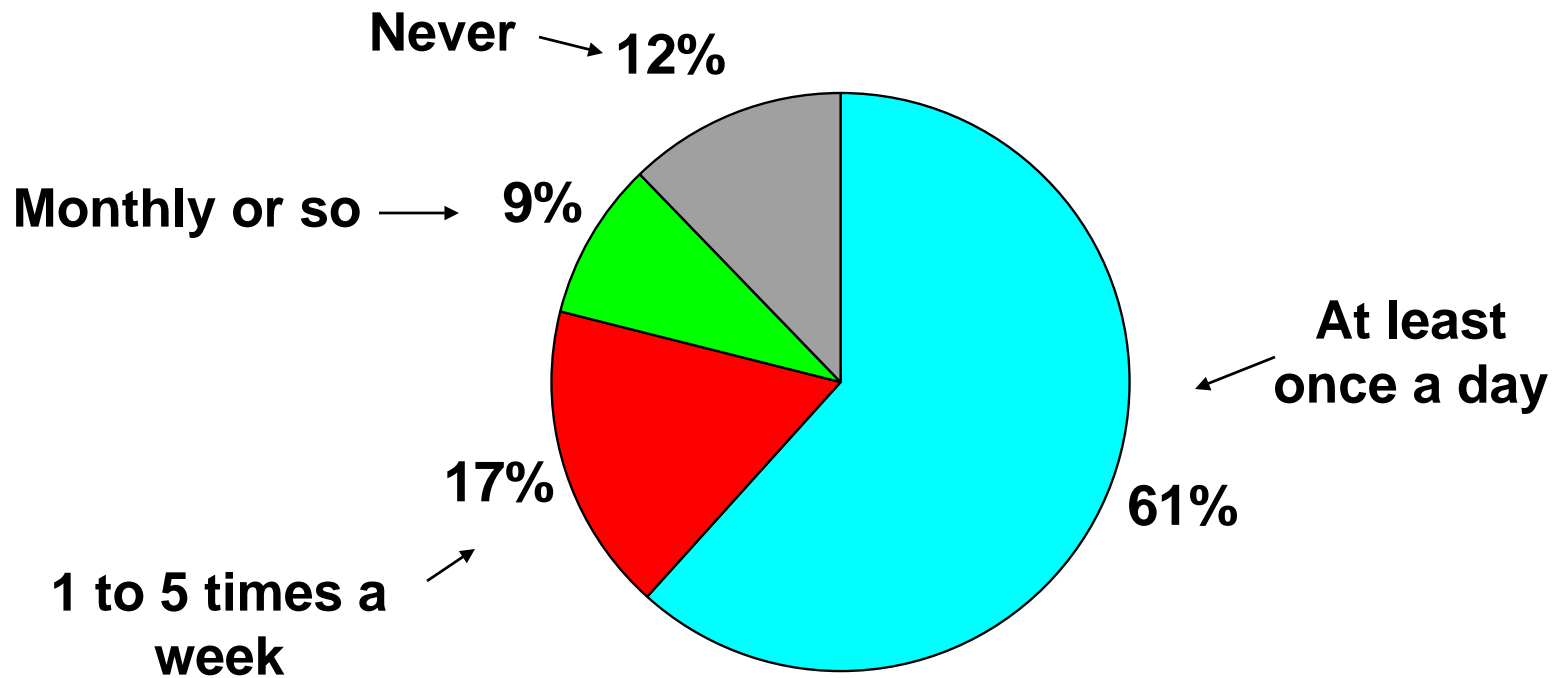
# **Section #1: Internet Habits Among CT Residents**





# Internet Usage in Connecticut

Question: *How often do you go on-line for any reason – either at home, at work or anywhere?*



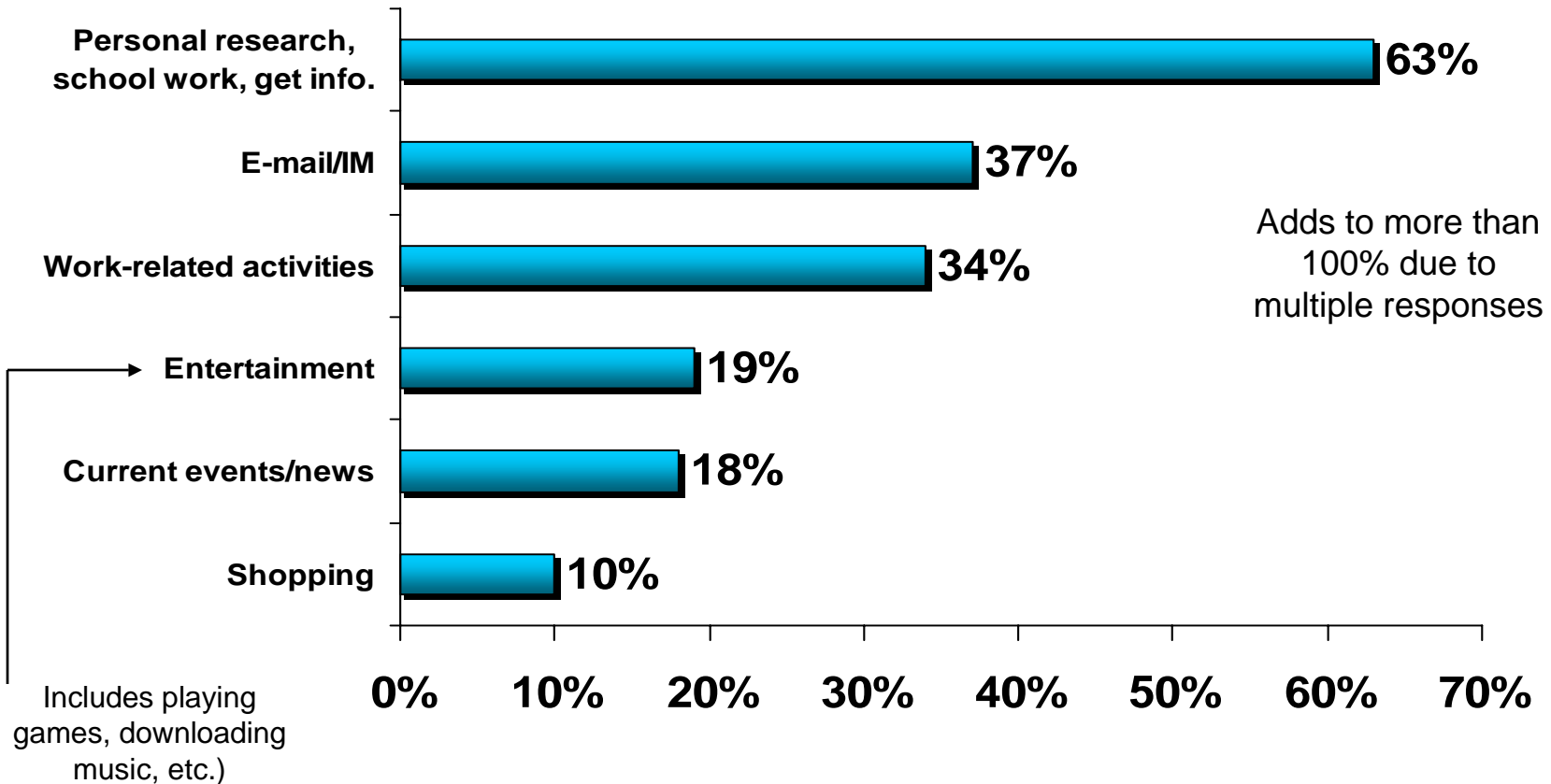
Base: all Connecticut residents





# What's Being Done On-line

Question: What are your primary reasons for going on-line?



Base: CT residents who go online at all (88% of total)





## Use Internet to Obtain Information

**80%** have used a computer to obtain information online

### MOST prevalent among:

- \* Better educated (college grads) = 96%
- \* Upper income (HHI \$75,000+) = 95%
- \* Younger (18 to 34 year olds) = 91%

### LEAST prevalent among:

- \* Lower income (HHI < \$40,000) = 60%
- \* Older (aged 55+) = 65%
- \* Less educated (high school grad or less) = 67%

Still fairly  
high levels

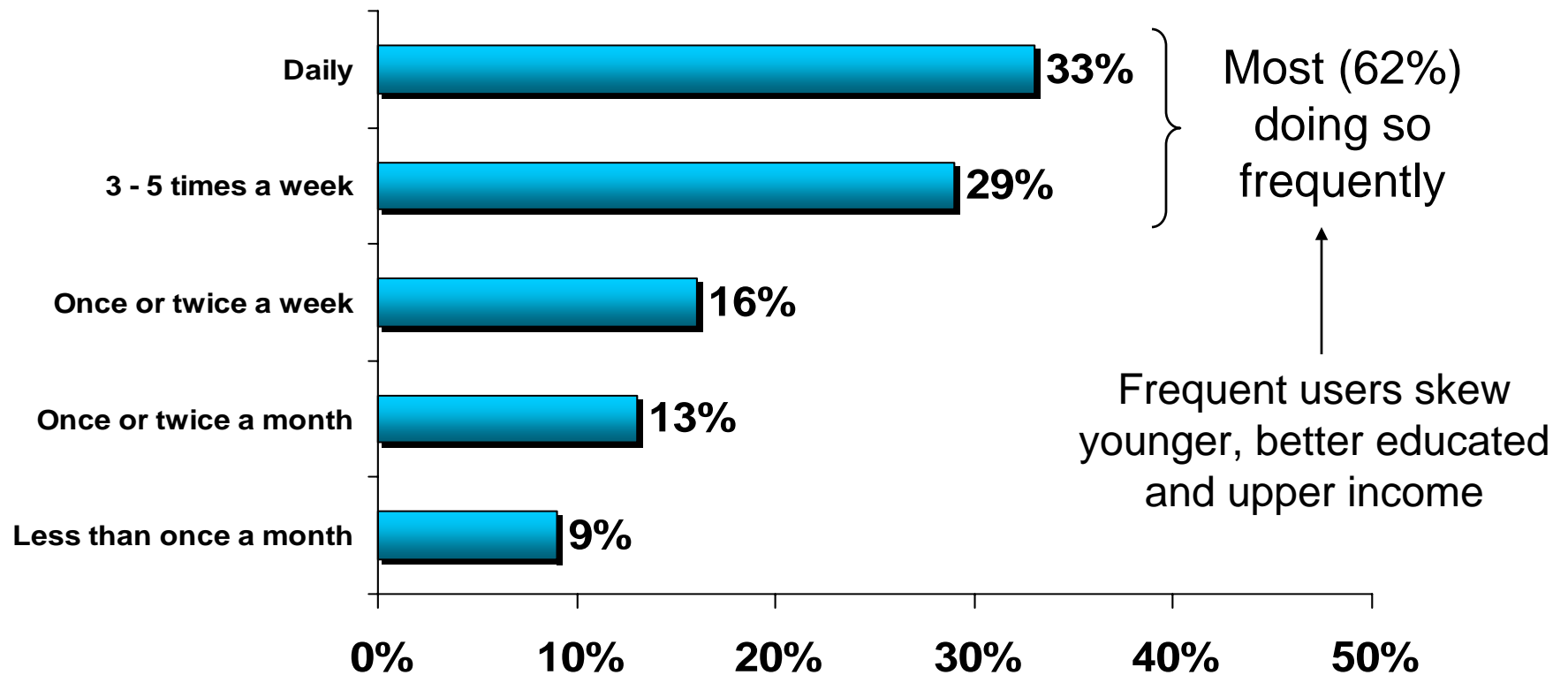
Base: all Connecticut residents





# How Often Go Online for Research?

*Question: How often do you go on-line for research or informational purposes?*



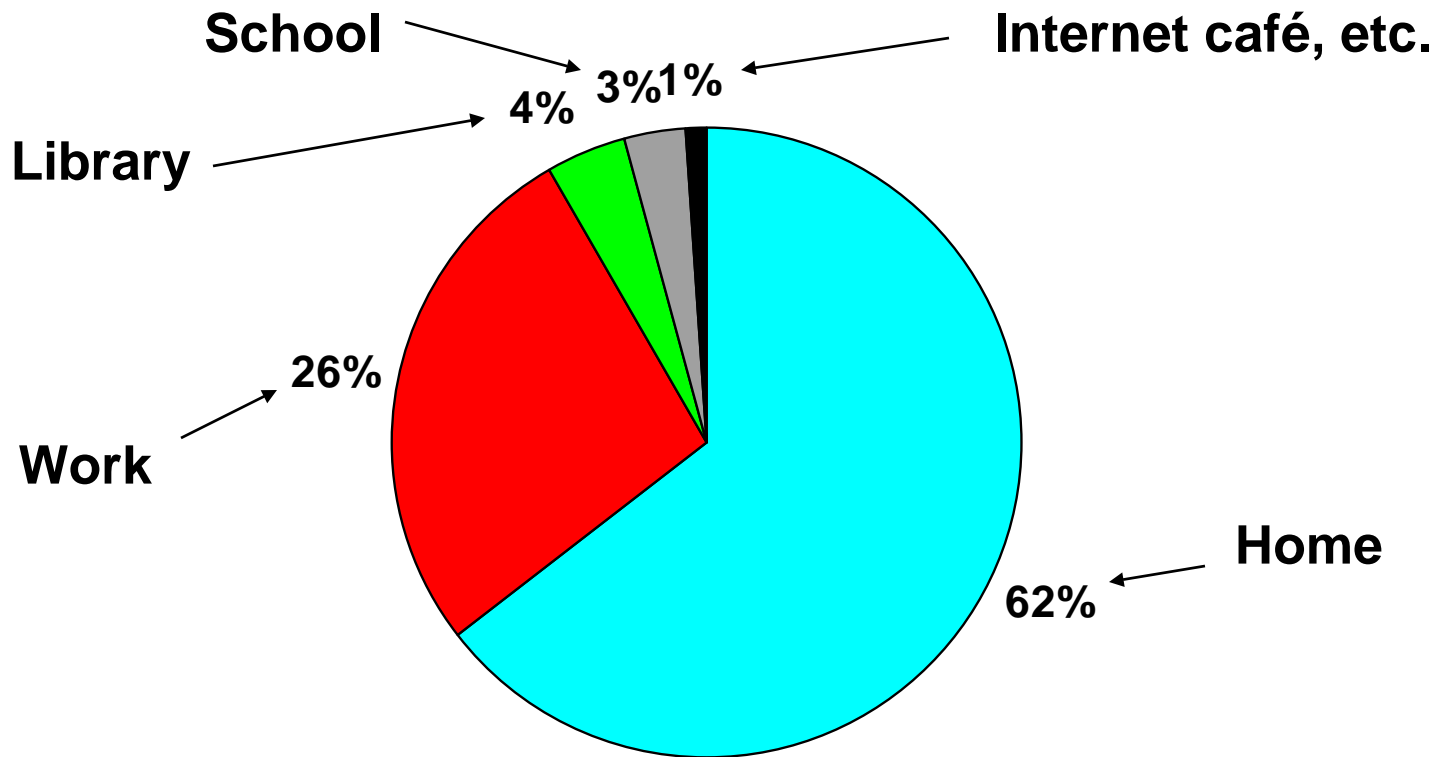
Base: CT residents who go online at all for research purposes (80% of total)





# Location of Online Research

Question: *From what location are you most likely to access online information?*

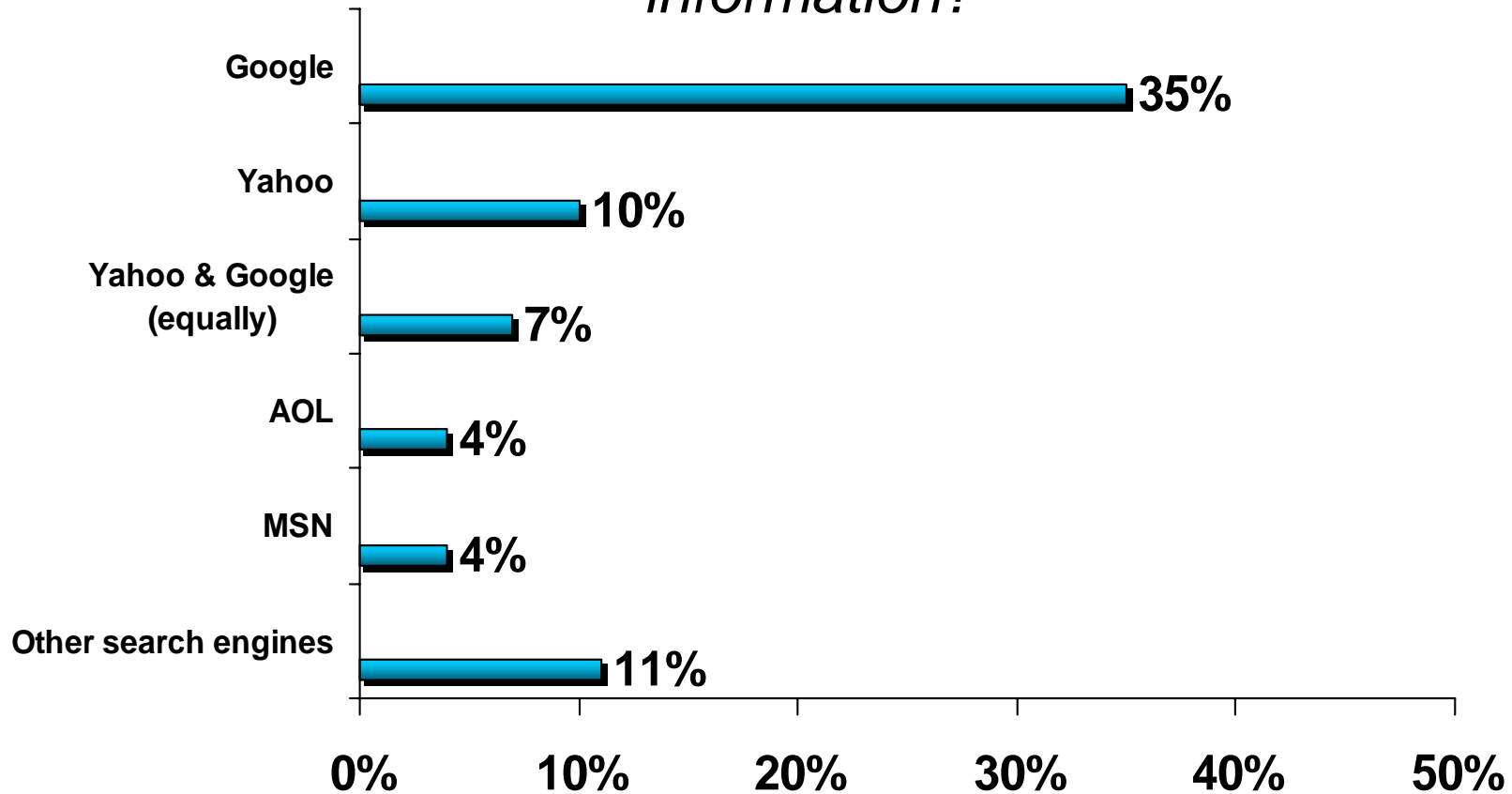


Base: CT residents who go online at all for research purposes (80% of total)



# Internet Resource for Information Access

*Question: Where on the internet do you typically go to get information?*



Base: CT residents who go online at all for research purposes (80% of total)





# Type of Research Being Done

- 14% health research
- 10% financial/business research
- 9% relating to school/courses
- 7% travel-related
- 6% news/current events
- 5% work related
- 5% product research (before buying)
- 4% historical research
- 4% science information
- 3% hobby related
- 3% searching for articles from magazines, etc.
- 2% sports research

No one  
type of  
research  
dominates

Base: CT residents who go online at all for research purposes (80% of total)





# Key Benefits to Conducting Research Online (Top 3 – according to online researchers)

## #1 → \* FAST (61% cite this)

Adds to more than 100%  
due to multiple responses

## \* CONVENIENCE (43%)

- Can access from home (22%)
- Available 24/7 (19%)
- Can access from work or school (2%)

## \* VARIETY OF SOURCES (26%)

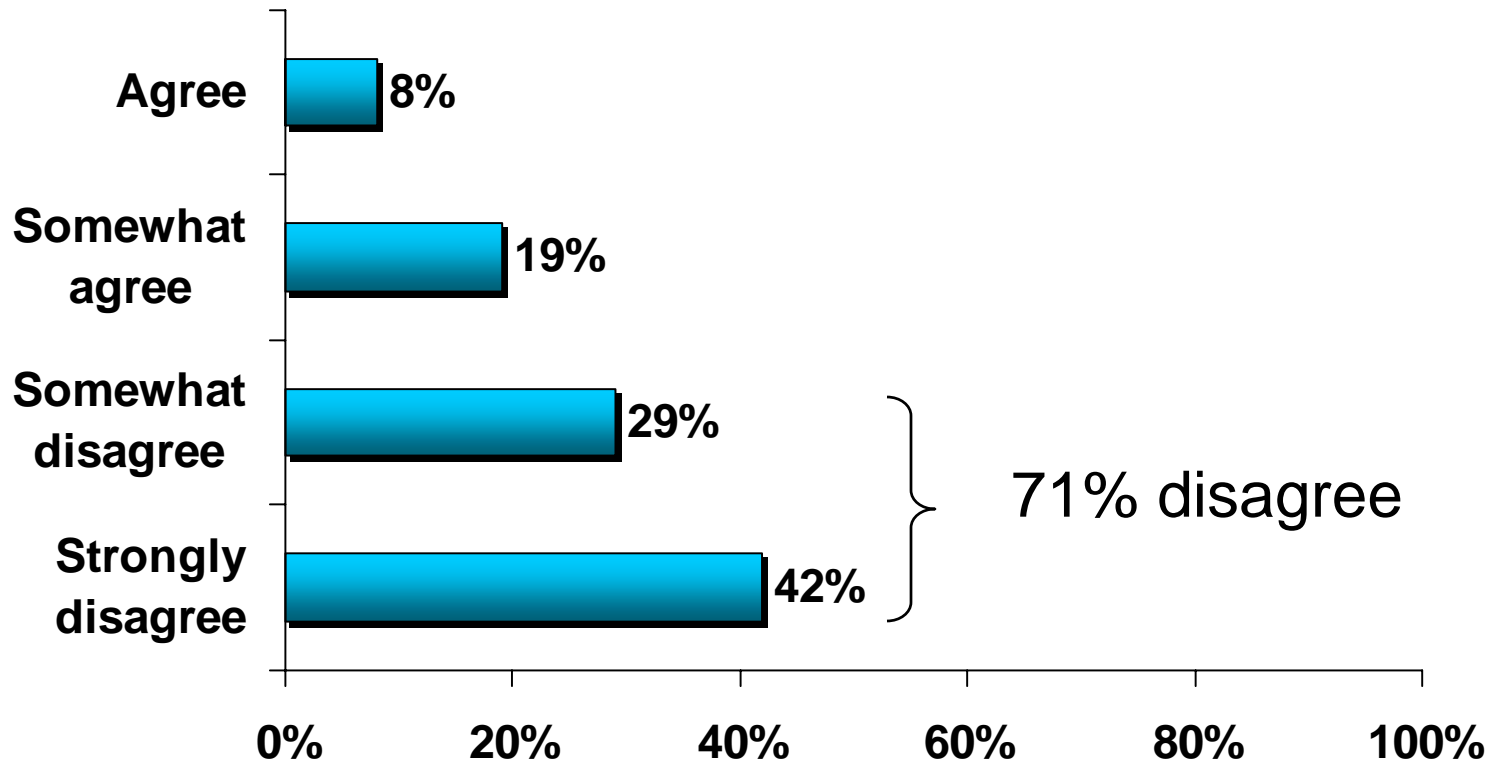
- More resources to tap into (21%)
- More viewpoints offered (5%)

Base: CT residents who go online at all for research purposes (80% of total)



# Online Researchers Feel Successful

*Question: Agree or disagree: I have difficulty finding the information that I need online?*



Base: CT residents who go online at all for research purposes (80% of total)





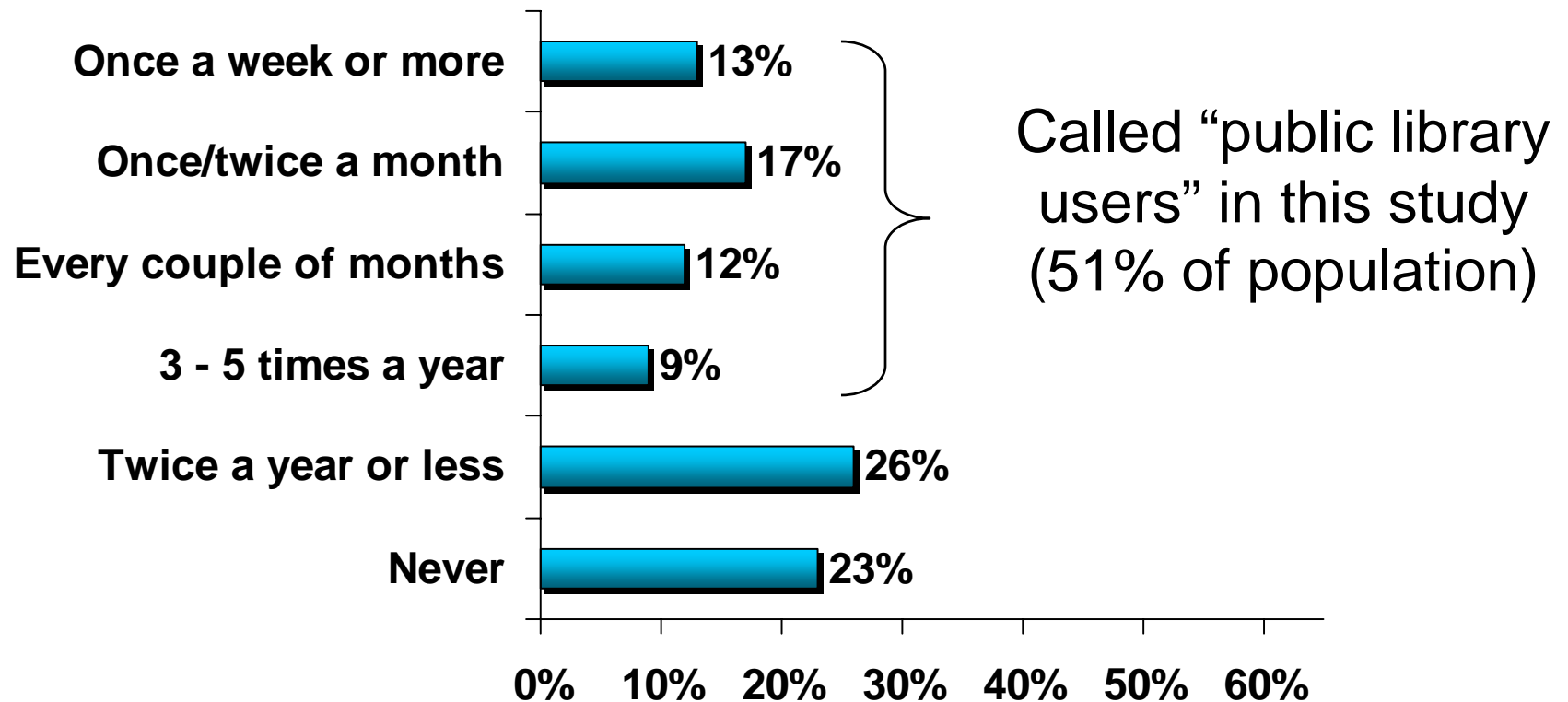
# **Section #2: Awareness and Usage of Library Services**





# Public Library Visitation

*Question: How often do you visit your local public library, if at all?*



Base: all Connecticut residents





## Groups More Likely To Use The Public Libraries Frequently

- ✦ Much greater library usage among those with some college or a college degree

	High school education or less	Some college	College grad
Use public library once a <u>month</u> or more	22%	40%	40%





## Groups More Likely To Use The Public Libraries Frequently (continued)

✦ Somewhat greater usage among 18 to 34 year olds

	18 - 34	35 - 54	55+
Use public library once a <u>month</u> or more	37%	28%	29%

✦ Somewhat greater usage among those with children

	Children under 18 at home	No children under 18 at home
Use public library once a <u>month</u> or more	35%	28%





# Public Library Usage – By County

✦ **There are no major differences by county in public library usage**

	Fairfield County	Hartford County	New Haven County	Other Counties
Use public library once a <u>month</u> or more	31%	32%	33%	26%

Note: We had 126 respondents in Fairfield County, 138 in Hartford County, 104 in New Haven County and 132 in all other counties combined





## Familiarity/Usage

**\* In the study, we measured familiarity with and usage of the following library services:**

- Public library website**
- Interlibrary loan**
- Connecticard**
- reQuest**
- iCONN**



## Usage of Public Library Website

	<b>General Public</b>	<b>Library Users</b>
<b>Have used public library's website</b>	<b>20%</b>	<b>30%</b>

Note: general public includes the total sample: library users and non-library users



## Familiarity/Usage of Interlibrary Loan

	<b>General Public</b>	<b>Library Users</b>
<b>Familiar with Interlibrary Loan</b>	<b>30%</b>	<b>42%</b>
<b>Have used Interlibrary Loan *</b>	<b>29%</b>	<b>41%</b>

\* After being read the description “Interlibrary loan is a service through which patrons can get books from other libraries and pick them up at and return them to their hometown libraries”



## Familiarity/Usage of Connecticard Program

	<b>General Public</b>	<b>Library Users</b>
<b>Familiar with Connecticard program</b>	<b>12%</b>	<b>13%</b>
<b>Have used Connecticard Program *</b>	<b>15%</b>	<b>23%</b>

\* After being read the description “Connecticard is the statewide initiative for public library cardholders. It allows public library cardholders from any Connecticut library to go into any other Connecticut public library and use its resources, for example, checking out books”



## Familiarity/Usage of reQuest program

	General Public	Library Users
Familiar with reQuest program	6%	7%
Have used reQuest program *	7%	12%

93% of reQuest users report being satisfied with the experience

\* After being read the description “ReQuest is a statewide library catalog that shows the holdings of over 400 Connecticut libraries. You can use it to search for a book or other item anywhere in the state and to request an interlibrary loan, in many cases”



## Awareness/Usage of iCONN/ CT Digital Library

	<b>General Public</b>	<b>Library Users</b>
<b>Heard of iCONN/ CT Digital Library</b>	<b>14%</b>	<b>17%</b>
<b>Have used iCONN/ CT Digital Library *</b>	<b>5%</b>	<b>7%</b>

\* After being read the description “The Connecticut Digital Library, or iCONN, is a service offered by the CT State Library to every resident in the state at no charge. The service includes access to online databases, such as full texts of newspapers, magazines, scholarly journals, on-line encyclopedias ...”

# Differences in Awareness – by Subgroup

✦ Somewhat greater iCONN awareness among library users

	Public library user	NOT a public library user
Have heard of iCONN/CT Digital Library	17%	10%

✦ Greatest iCONN awareness among younger residents

	18 to 34	35 to 54	55+
Have heard of iCONN/CT Digital Library	19%	8%	14%

**No differences by other demographic groups**



# Differences in Awareness – by County

✦ **Much lower awareness in Fairfield and Hartford counties**

	Fairfield County	Hartford County	New Haven County	Other Counties
Have heard of iCONN/Connecticut Digital Library	8%	9%	21%	17%

**Greatest awareness**

Note: We had 126 respondents in Fairfield County, 138 in Hartford County, 104 in New Haven County and 132 in all other counties combined





# How Did They Hear About iCONN

## Library (30%)

- \* From librarian (20%)
- \* From materials at library (10%)

## Schools (29%)

- \* College/school attending (26%)
- \* From child's school (3%)

## Word of mouth (25%)

- \* Friend, neighbors (17%)
- \* Coworkers (8%)

## Internet (6%)

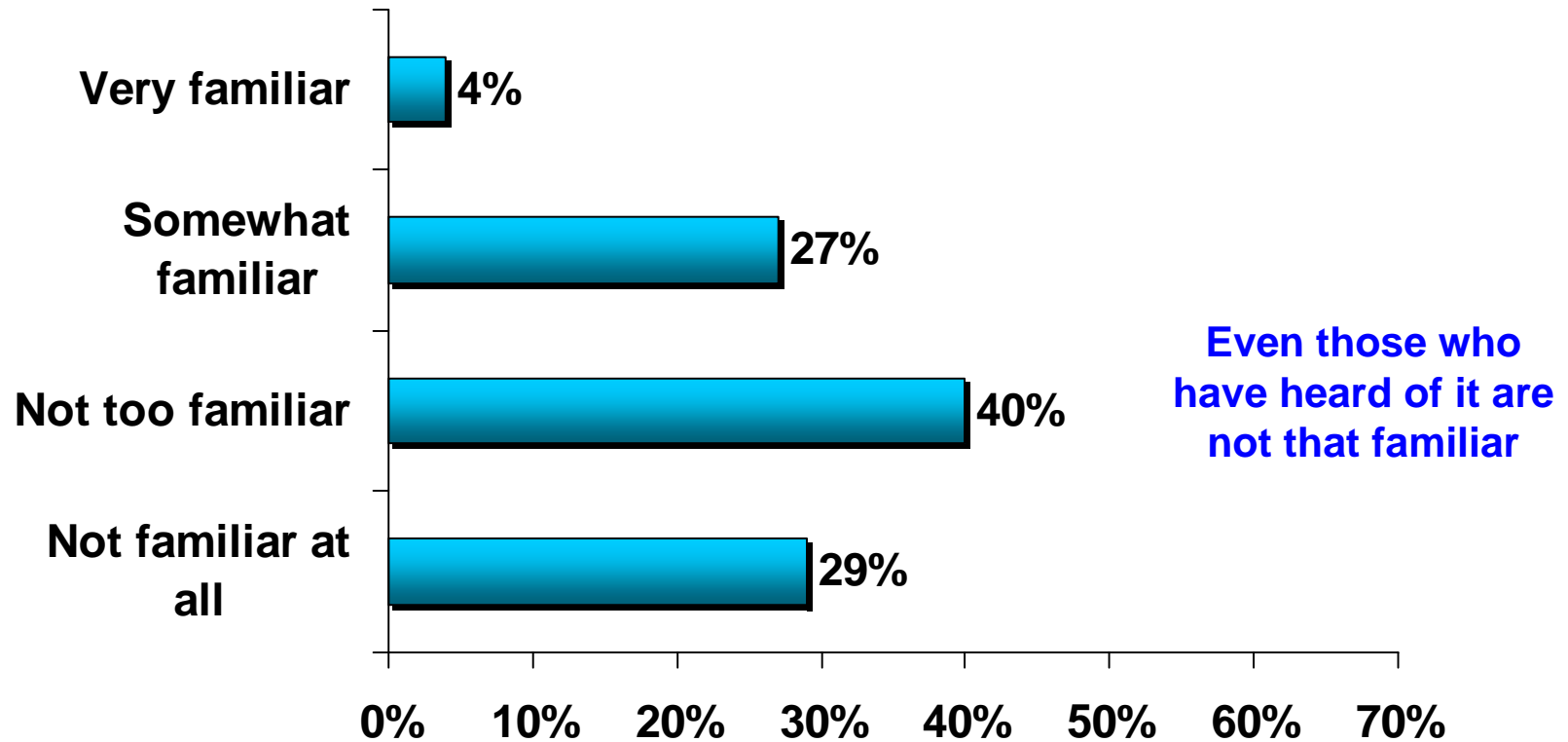
- \* iCONN site (1%)
- \* Other website led them to iCONN (5%)

Base: those who have heard of iCONN (14% of public)



## Level of iCONN Familiarity (Among those who have heard of it)

*Question: How familiar are you with iCONN?*



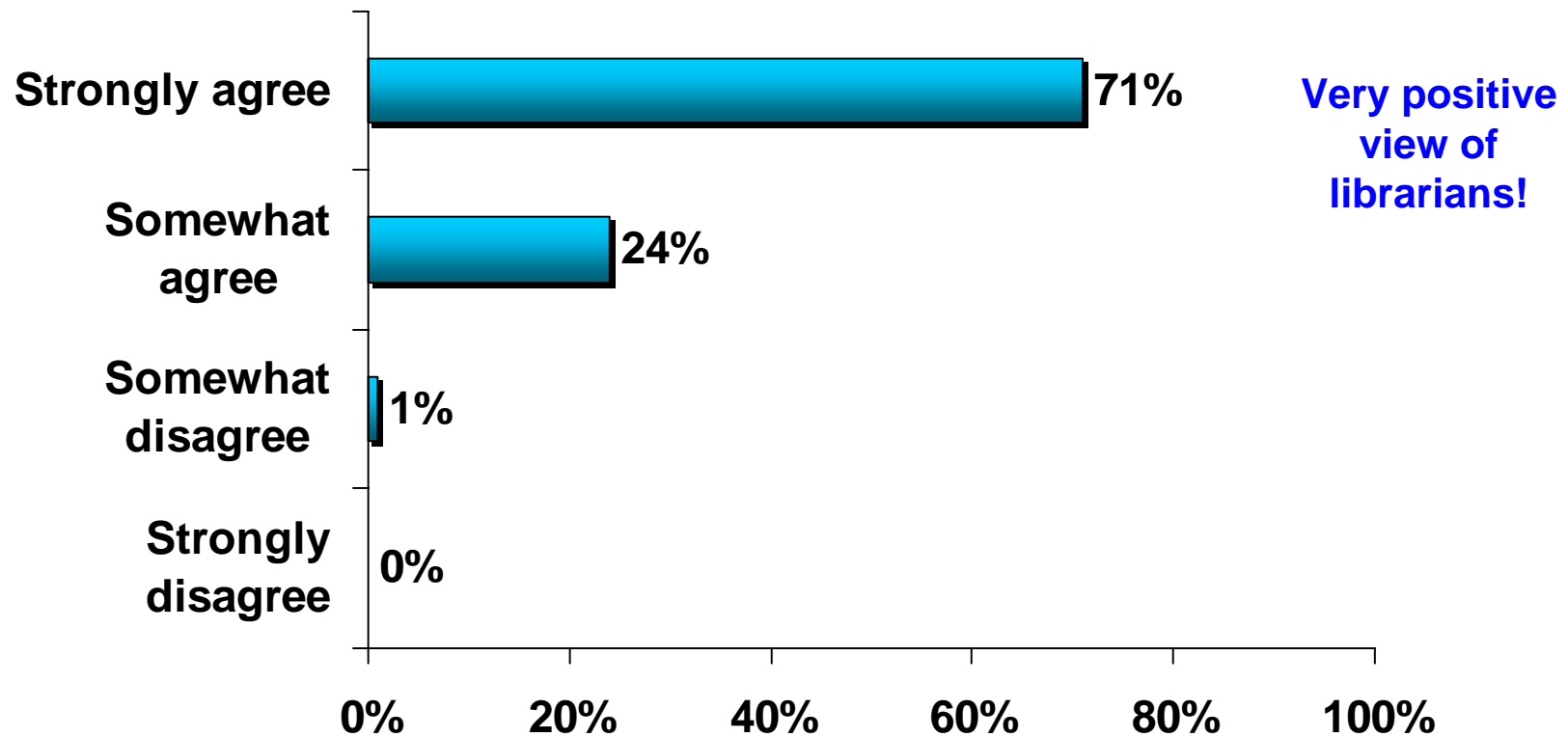
Base: Among those who have heard of it (14% of public)





# View of Librarians

*Question: Agree/disagree -- Librarians provide accurate and reliable information*



Base: general public





## Librarians Versus Internet (Librarians are much more reliable)

*Question: Agree/disagree -- \_\_\_\_\_ provide(s)  
accurate and reliable information*

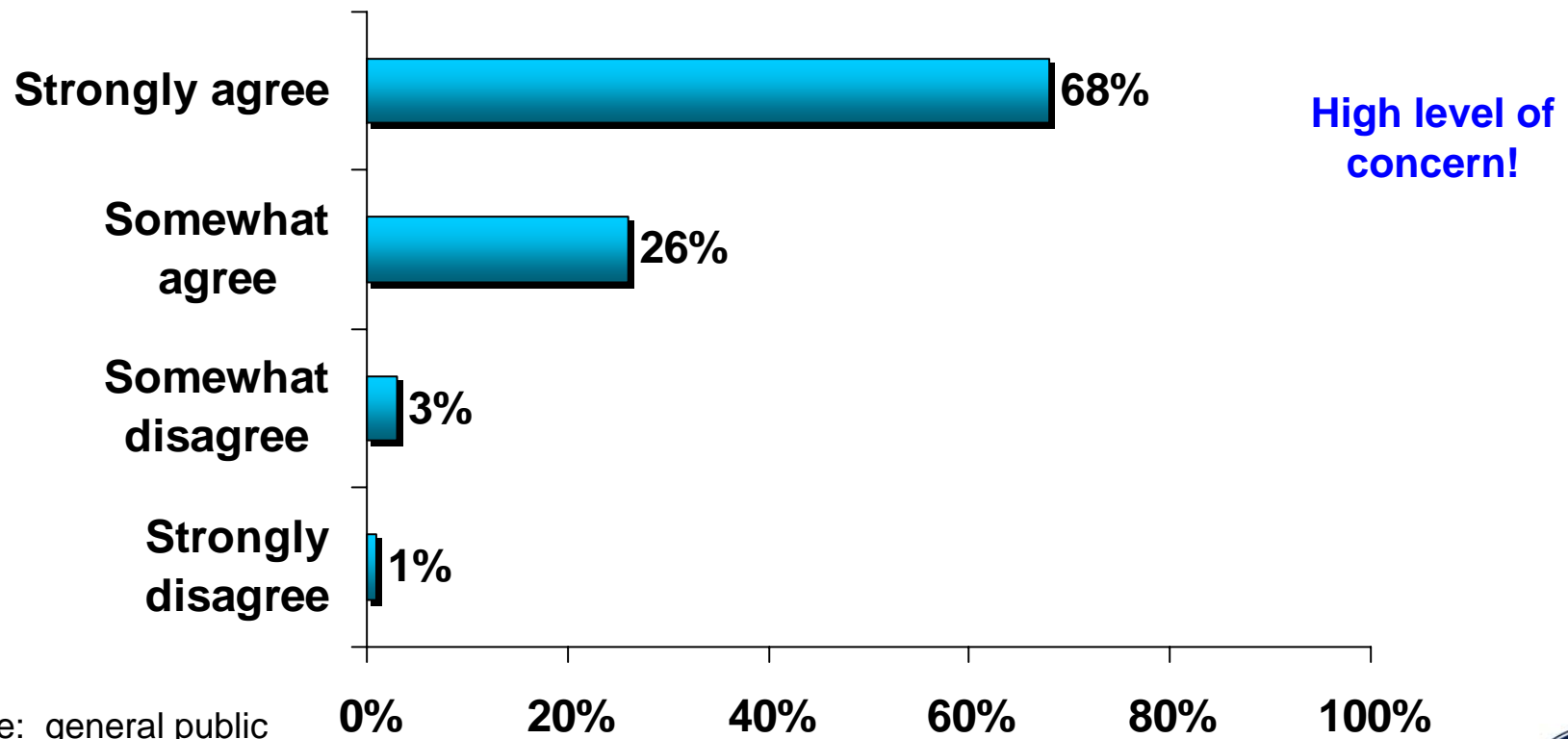
	<b>Librarians</b>	<b>Internet</b>
<b>Strongly agree</b>	<b>71%</b>	<b>33%</b>
<b>Somewhat agree</b>	<b>24%</b>	<b>48%</b>
<b>Somewhat disagree</b>	<b>1%</b>	<b>6%</b>
<b>Strongly disagree</b>	<b>0%</b>	<b>2%</b>
<b>Not sure</b>	<b>1%</b>	<b>8%</b>

Base: general public



# Concern About Equal Access To Information

*Question: Agree/disagree -- I'm concerned about equal access to information; I want residents of all communities in Connecticut to be able to access quality information*





## There is More Concern About Equal Access To Information Among Middle/Upper Income

*Question: Agree/disagree -- I'm concerned about equal access to information; I want residents of all communities in Connecticut to be able to access quality information*

	Household income < \$40,000	Household income \$40K to < \$75K	Household income \$75,000+
<b><u>Strongly</u> agree</b>	56%	77%	75%
<b><u>Somewhat</u> agree</b>	38%	21%	20%

Base: general public



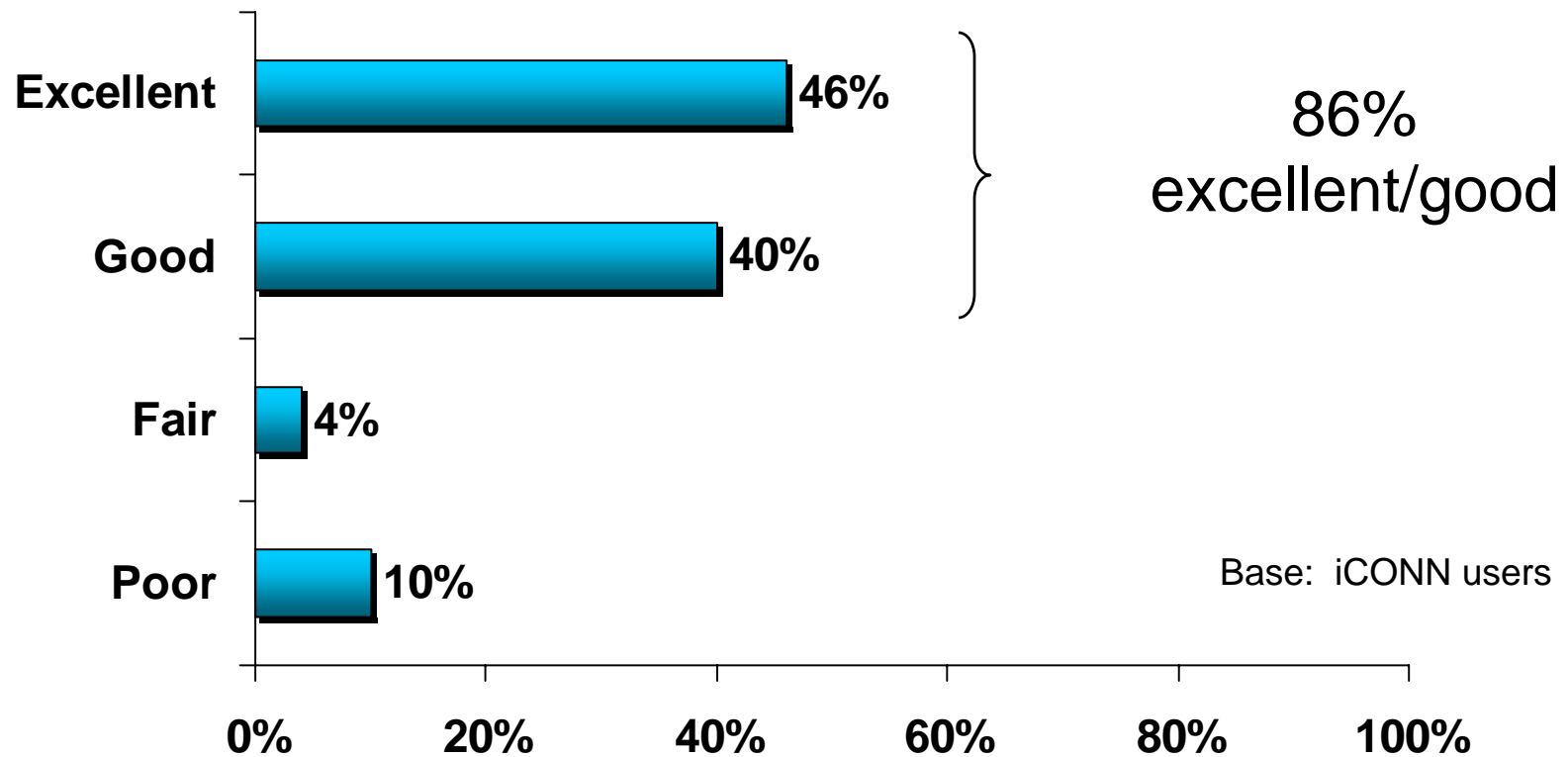
## **Section #3: Feedback from iCONN Users**

Note: small sample of users (n = 26)  
Qualitative read only



# Very Positive Overall Ratings

*Question: Overall, how would you rate iCONN, based on your experience with it?*





## Very Positive Overall Ratings (continued)

*Question: Are you satisfied or dissatisfied with the information found on iCONN?*

**100%** say they are satisfied !!

*Question: Would you recommend iCONN to a family member, friend or coworker who needs information?*

**96%** say they would recommend it !!

Base: iCONN users





# iCONN Resources Used

## Specific Mentions

**22% online newspapers**

**15% online magazines**

**9% library catalog**

**7% photo library**

**5% scholarly journals**

**4% genealogy resources**

**2% history resource center**

**2% business resource center**

**1% health/wellness resource center**

Base: iCONN users





# For What Purpose Did You Use iCONN?

**39% schoolwork/coursework for self**

**31% personal research projects**

**30% work/business**

**23% schoolwork with child**

**7% newspapers (for fun)**

**5% genealogy**

**5% personal reading (for fun)**

**3% magazines (for fun)**

**Adds to more than  
100% due to  
multiple responses**

**“For fun” means  
not related to  
school or work**

Base: iCONN users





# iCONN Users – Demographic Profile

## iCONN users skew:

### \* Upper income

- 75% have income of \$75,000+ (versus only 37% for CT general public)

### \* Male

- 64% are men (versus only 49% for CT general public)

### \* Better educated

- 35% are college grads (versus 24% among CT general public)

### \* More likely to have internet access at home

- 98% have internet access from home (versus 75% for CT general public)





# **Section #4: Interest Among Current Non-users**






## iCONN Description (read to all respondents)

*“The Connecticut Digital Library, or iCONN, is a service offered by the Connecticut State Library to every resident in the state at no charge. The service includes access to on-line databases, such as full texts of newspapers, magazines, scholarly journals, on-line encyclopedias, e-books, health and wellness informational materials and photographic archives. It also offers an online library catalog listing the books and titles of over 400 public, academic and school libraries in the state. iCONN offers this service to all residents of the state having a public library card. The service can be used at ANY public library or on your home computer or at any Internet-accessible location”*



## Interest in iCONN – Based on Description

*Question: Based on this description, how likely are you to use iCONN in the future ...?*

	<b>General Public</b>	<b>Library Users</b>
 <b>Very likely</b>	<b>22%</b>	<b>29%</b>
<b>Somewhat likely</b>	<b>35%</b>	<b>42%</b>
<b>Not too likely</b>	<b>18%</b>	<b>14%</b>
<b>Not at all likely</b>	<b>24%</b>	<b>14%</b>

**Note: the “very likely” figure is the best estimate of near term market potential**

Base: never used iCONN before (95% of sample)



## Strongest Interest in iCONN - Subgroups (above average interest)

*Based on description read*

### % saying “VERY likely to use”

- \* 31% among those who do online research often
- \* 31% among those with middle income (\$40,000 to < \$75,000)
- \* 29% among those with children under 18
- \* 29% among library users
- \* 28% among those with some college or more education
- \* **22% among general public (average)**





## Least Interest in iCONN - Subgroups (below average interest)

*Based on description read*

### % saying “VERY likely to use”

- ↓ \* **22% among general public (average)**
- \* **18% among those with no children at home**
- \* **17% among those with a high school education or less**
- \* **15% among non-library users**
- \* **11% among non-library card holders**
- \* **11% among those with incomes of < \$40,000**



## Specific Offerings

**\* Among those with at least some interest\* in iCONN, we then gauged interest in specific iCONN offerings ...**

\* Those who said “very likely”, “somewhat likely” and “not too likely” to use iCONN, based on the description. Only those who said “not at all likely” were not asked questions about the specific offerings



# Interest in Specific iCONN Offerings

Online access to ...	% saying VERY interested	% saying very/somewhat interested
Newspapers	37%	77%
Health and wellness center ...	35%	82%
History resource center ...	34%	74%
Business and company resource center ...	30%	63%
Library catalog ...	28%	73%
Genealogy resources	28%	62%
Associated Press photographs	20%	63%
Scholarly journals	14%	47%
Spanish language & bilingual mags	12%	27%

Base: non-iCONN users who express at least some interest





# Interest in Specifics – by Subgroups

- \* **Men** show more interest in business and history resources, while **women** show more interest in health resources

Very/somewhat interested in	Men	Women
History resource center	83%	65%
Business and company resource center	72%	54%
Health and wellness resource center	75%	87%

Still strong interest among women

Men are not too far behind

Base: non-iCONN users who express at least some interest





# Interest in Specifics – by Subgroups

(Continued)

- \* Those with children show much more interest in the online library catalog and online access to AP photos (school projects?)

Very/somewhat interested in	With children under 18 at home	No children
Online library catalog	81%	66%
AP library of photographs	72%	54%

Still strong interest

Base: non-iCONN users who express at least some interest





# Interest in Specifics – by Subgroups

(Continued)

- \* **Upper income** show more interest in online newspapers, magazines, scholarly journals, business resource center and history resource center; **lower income** show more interest in bilingual magazines

Very/somewhat interested in	Lower income (< \$40,000)	Middle income (\$40k to < \$75K)	Upper income (\$75K+)
Online newspapers and mags	64%	79%	81%
History resource center	56%	84%	82%
Business resource center	53%	58%	76%
Online scholarly journals	35%	57%	49%
Spanish and bilingual mags	39%	27%	23%

Base: non-iCONN users who express at least some interest





## Interest in Specific Newspapers Online

	% saying they think they would use iCONN to access
<i>Hartford Courant</i>	71%
<i>New York Times</i>	60%
<i>Wall Street Journal</i>	50%
<i>Washington Post</i>	33%
<i>LA Times</i>	15%
<i>Christian Science Monitor</i>	13%

Big Drop Off

Base: non-iCONN users who express at least some interest



# Newspapers – Differences by Subgroup

- ✦ **Greater interest among men than women**
  - *Wall Street Journal* (62% for men v. 38% for women)
  - *Washington Post* (44% for men v. 22% for women)

(No newspapers show a female skew in interest)

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- ✦ **Greater interest among upper income**
  - *Wall Street Journal* (61% for \$75K+ versus 39% for < \$40K)

- ✦ **Greater interest among lower income**
  - *LA Times* (13% for \$75K+ versus 29% for < \$40K)
  - *Christian Science Monitor* (13% for \$75K+ versus 28% for < \$40K)



## Newspapers – Differences by Subgroup (Continued)

- \* Greater interest among younger/middle aged than older
  - *Hartford Courant* (74% for 18 to 54 v. 59% for 55+)
  
- \* Greater interest among older than younger
  - *Washington Post* (26% for 18 - 34 v. 42% for 55+)



## Interest in Specific Magazines Online

	% saying they think they would use iCONN to access
Consumer Reports	78%
Health magazines	76%
Popular magazines for general interest, travel, hobbies	69%
Newsmagazines, such as <i>Time</i>	67%
Science and technology mags	57%
Business and economics mags	55%
Literature magazines	29%
Law magazines	28%

Big Drop Off

Base: non-iCONN users who express at least some interest



## Magazines – Differences by subgroup

- ✦ **Greater interest among men than women**
  - Science and tech mags (73% for men v. 40% for women)
  - Business and economic mags (66% for men v. 44% for women)
  
- ✦ **Greater interest among women than men**
  - Health mags (69% for men v. 82% for women)

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- ✦ **Greater interest among younger/middle aged than older**
  - Business/econ mags (57% for 18 to 54 v. 42% for 55+)
- ✦ **Greater interest among older/middle aged than younger**
  - *Consumer Reports* (86% for 35+ v. 62% for 18 – 34)



## Other Possible Offerings

✦ **All respondents who had not yet used iCONN were asked if other possible iCONN offerings might make them more likely to use iCONN**

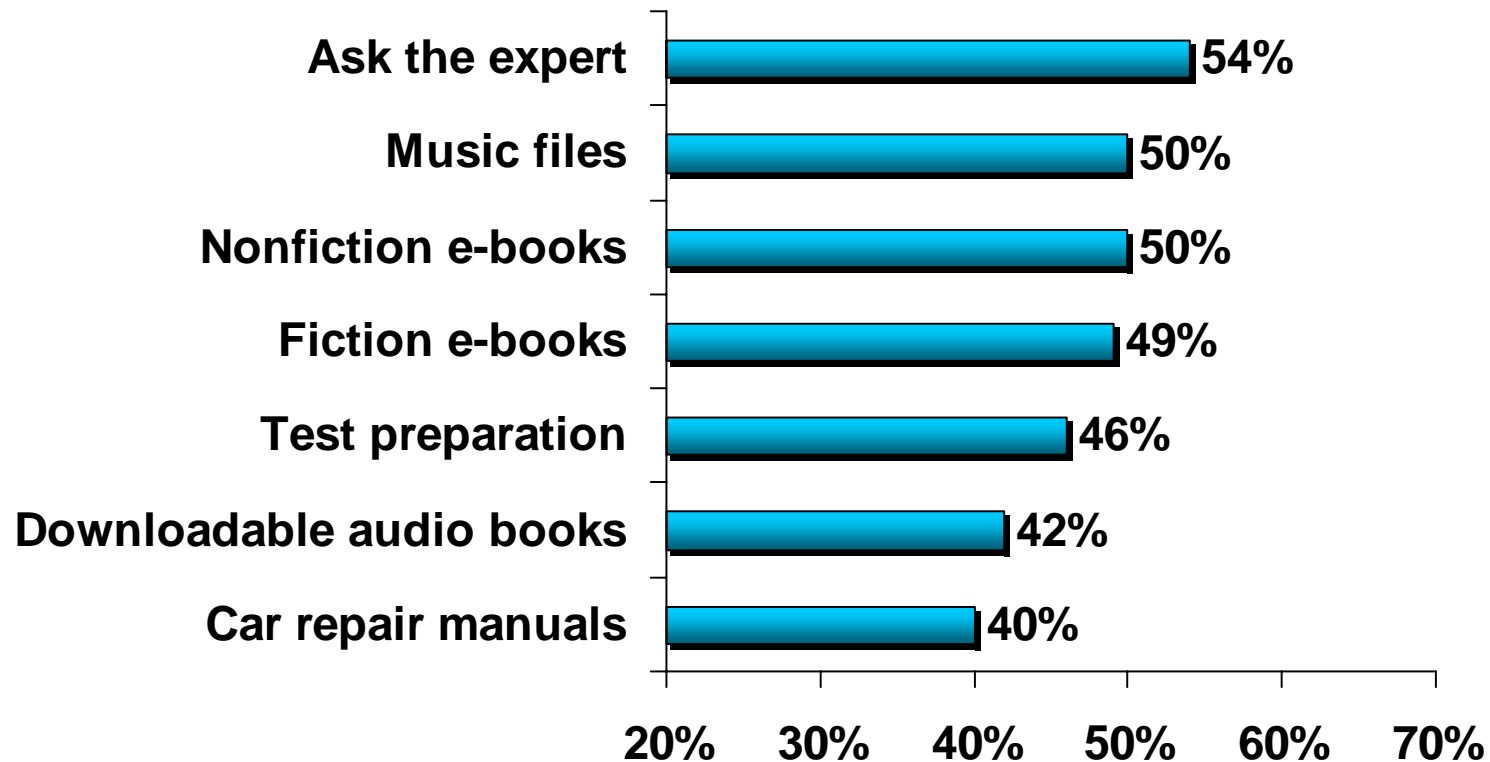
1. *“Offered a live online ask the expert service for research assistance or homework help”*
2. *“Offered online test preparation services”*
3. *“Offered online car repair manuals”*
4. *“Offered nonfiction e-books ... could be read online or downloaded”*
5. *“Offered fiction e-books ... could be read online or downloaded”*
6. *“Offered downloadable audio e-books”*
7. *“Offered access to music files ... classical, jazz, blues, gospel and ethnic music”*



# Interest in Other Offerings

Question: *Would you be more likely to use iCONN if it offered ...?*

Shown: % saying “would be more likely to use”



Base: all non-iCONN users



## Possible Offerings -- Differences by Subgroup

- ✦ **ALL of these possible offerings show much more interest among younger and middle aged residents (18 to 54) than they do to 55+**
- ✦ **ALL show more interest among middle income (\$40K to < \$75K) than among the two income extremes**
- ✦ **Online car repair shows a strongly male skew (54% among men v. 28% among women)**
- ✦ **Greater interest among households with children for:**
  - **Online expert**
  - **Nonfiction and fiction e-books**
  - **Music files**



## Motivating Them To Use iCONN

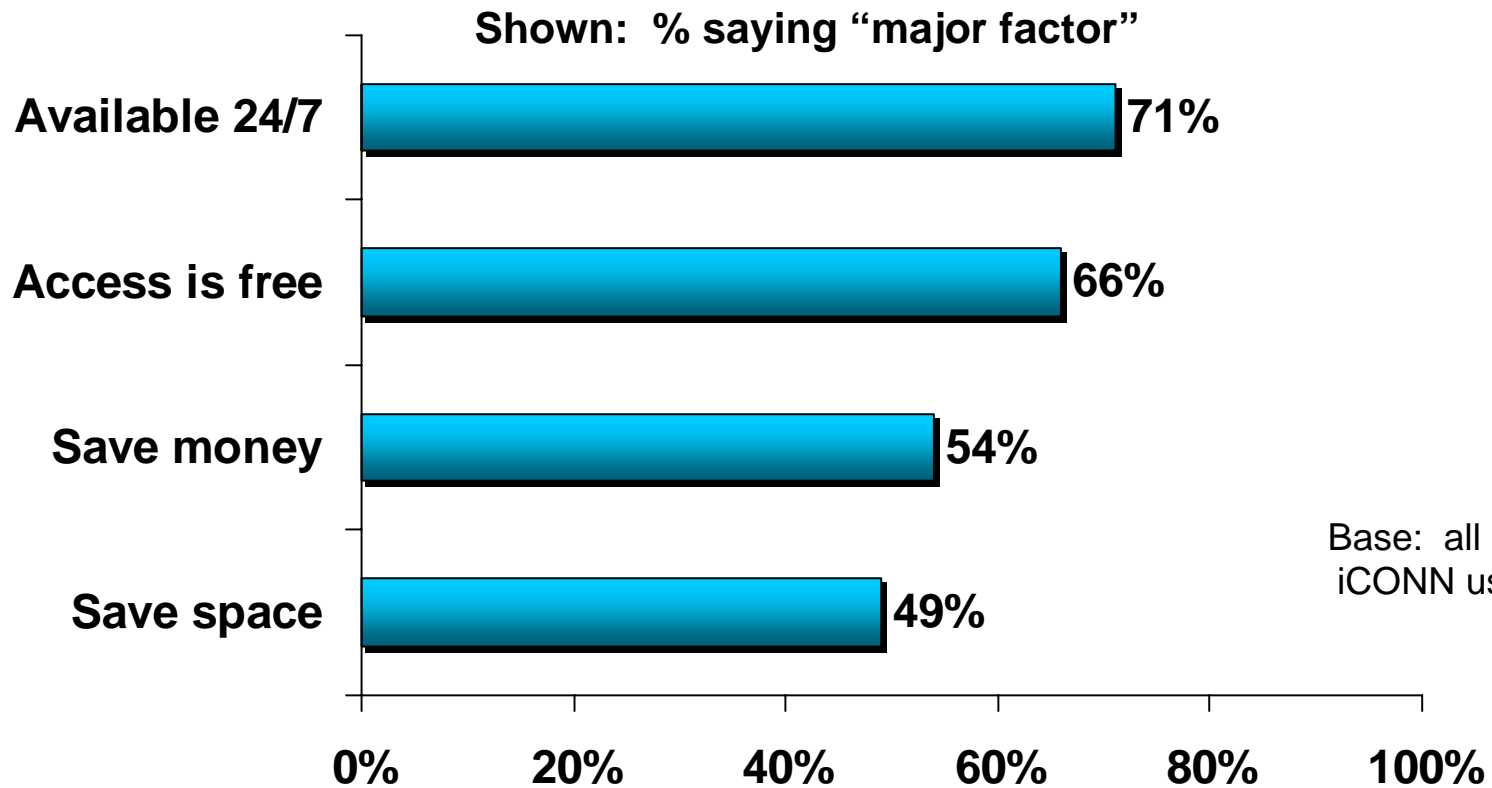
✳️ **Four themes were tested to see how strong of a factor they might be in motivating iCONN usage ...**

1. *“Access is free”*
2. *“iCONN is available 24 hours a day, 7 days a week”*
3. *“You can use it to save space because you can count on iCONN to have articles from your favorite magazines”*
4. *“You can use it to save money because you don’t have to subscribe to as many newspapers or magazines”*



# Motivation

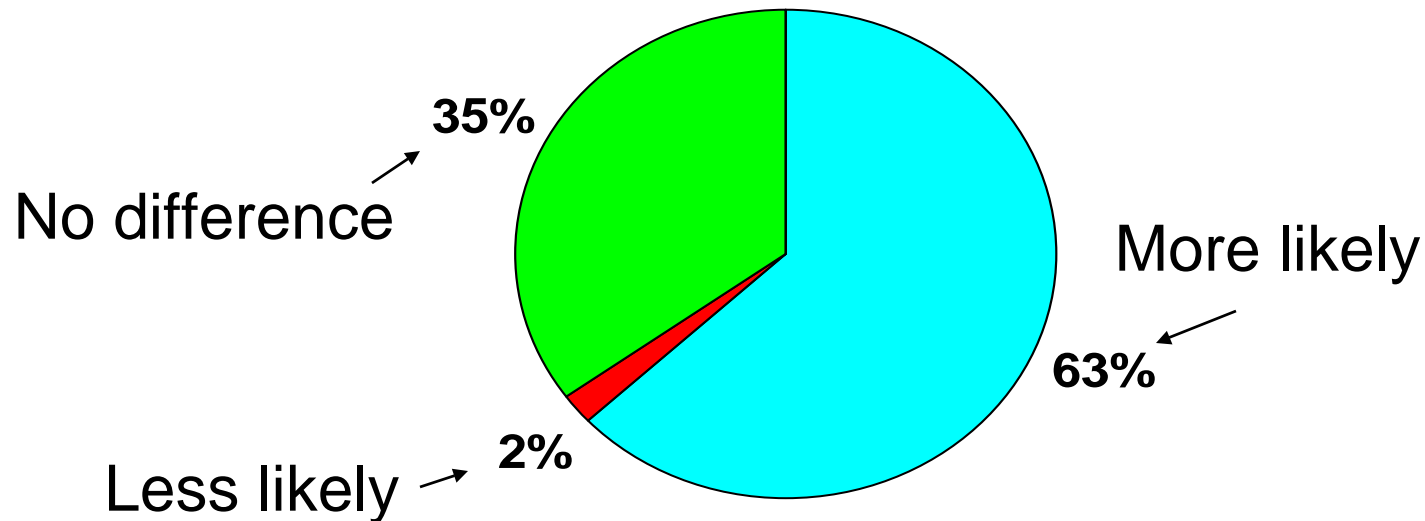
*Question: Think for a moment about what might motivate you to use iCONN. For each of the following, please tell me if you see it as a major factor, minor factor or not a factor at all in possibly motivating you to use iCONN?*





# Spurring Many To Get A Library Card

*Question: Based on what you have learned (about iCONN) from this survey, would you say that you are now more likely to get a library card from your public library, less likely to get a library card or is there no difference?*



Base: Among non-iCONN users who do not have a library card, but express at least some interest in iCONN



# Section #5: Conclusions and Recommendations





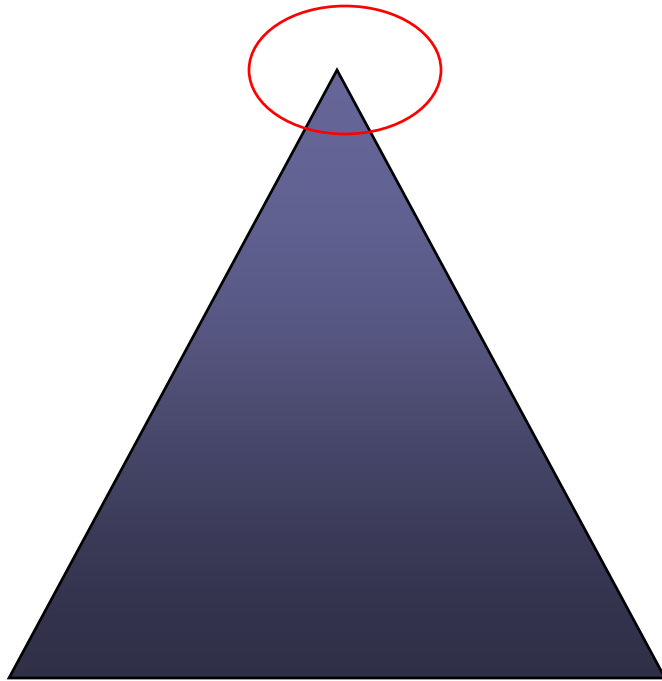
## Significant Room for Growth

- \* This research suggests that there is significant room for marketplace growth for iCONN
  - Familiarity and usage is currently low
  - Yet, interest is relatively high
    - ⇒ 22% of CT residents who have not yet used it express strong interest in it (almost 1 in 4 state residents)



## Significant Room for Growth (continued)

**This research suggests that iCONN has only captured the “tip of the iceberg” so far**



**More communications are warranted, and should deliver a return of users**



## **iCONN Growth Will Start (Mainly) With Specific Demo Groups**

### **Most likely to use first (above average interest):**

- \* Those who do online research often**
- \* Those with middle income (\$40,000 to < \$75,000)**
- \* Those with children under 18**
- \* Library users**
- \* Those with some college or more education**

**Targeting these groups in communications will deliver the most bang for the buck**



## Hardest Groups To Penetrate

### Less interest:

- \* Those with no children at home
- \* Those with a high school education or less
- \* Non-library users
- \* Non-library card holders
- \* Those with incomes of < \$40,000

There is some interest among these groups, but at a much lower level than other groups



## **Repeat Use Should Ensure A Steady Growth In Usage as New Users are Brought In**

- \* Current users are overwhelmingly satisfied with the iCONN service**
  - iCONN delivers!!! (keep up the good work)**
- \* Repeat usage seem assured, based on the high satisfaction ratings**
  - Once you hook them, users are happy**
    - ⇒ The key seems to be to get them to notice iCONN**
    - ⇒ Positive word of mouth should help, once a critical mass of users is reached**



## Potential New iCONN Offerings

- ✦ **All of the new offerings tested show significant interest (over 40%). Hence, all are worthwhile additions**
  - **The “Ask the Expert” offering shows the most widespread interest (54%)**

**The only negative is that none of these show special interest among the tougher to penetrate groups: lower income, non-library users, no children at home, etc.**



# How To Market iCONN

**#1. Emphasize most attractive offerings – which will capture the most widespread appeal (useful for mass communications)**

✧ **Online newspapers and magazine access**

- **Newspapers**: *Hartford Courant, NY Times and Wall Street Journal* have broadest appeal
- **Magazines**: All magazines tested have broad appeal, except literature and law mags

✧ **Health and wellness resource center**

✧ **History resource center**

✧ **Library catalog**





## How To Market iCONN (continued)

### #2. Something for everyone – useful for communications to targeted audiences

#### Special appeal among men

- History center
- Business center
- *Wall Street Journal*
- *Washington Post*
- Science and tech mags
- Business mags

#### Special appeal among women

- Health and wellness center
- Health magazines

#### Special appeal among households with children

- Online library catalog
- AP photos



## How To Market iCONN (continued)

### #2. Something for everyone – useful for communications to targeted audiences (continued)

#### Special appeal among lower income households

- Bilingual mags
- *LA Times*
- *Christian Science Monitor*

#### Special appeal among younger/middle aged

- *Hartford Courant*

#### Special appeal among upper income households

- *Wall Street Journal*

#### Special appeal among middle/older aged

- *Consumer Reports*



## How To Market iCONN (continued)

### #3. Broad marketing themes

Available 24/7

(from home, from anywhere)

Free

Multiple Sources

Fast

Trustworthy

("librarian approved")

Diverse offerings

(something for everyone)



## **One Problem – People Feel They are Already Getting What They Need Online**

- \* This research suggests people who are doing research online now (80% of the state population) without iCONN feel fairly capable and successful
  - Which may be why they are not actively seeking out iCONN****

**But, once they learn about iCONN, residents see the benefits of iCONN**



# For More Information On This Study

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