



iCONN Market Survey

Presentation of Key Findings

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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?
 - **Assess any marketing strategies used since 2005**



Methodology

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

- **Representative sampling – results are statistically representative of the state’s adult population**
- **200 interviews among CT public library users**
- **In-depth interviews – 15 minutes**
- **Conducted in October – November, 2007**
 - ⇒ **All interviews conducted by trained CSRA interviewers from our telephone facility in Storrs, CT**



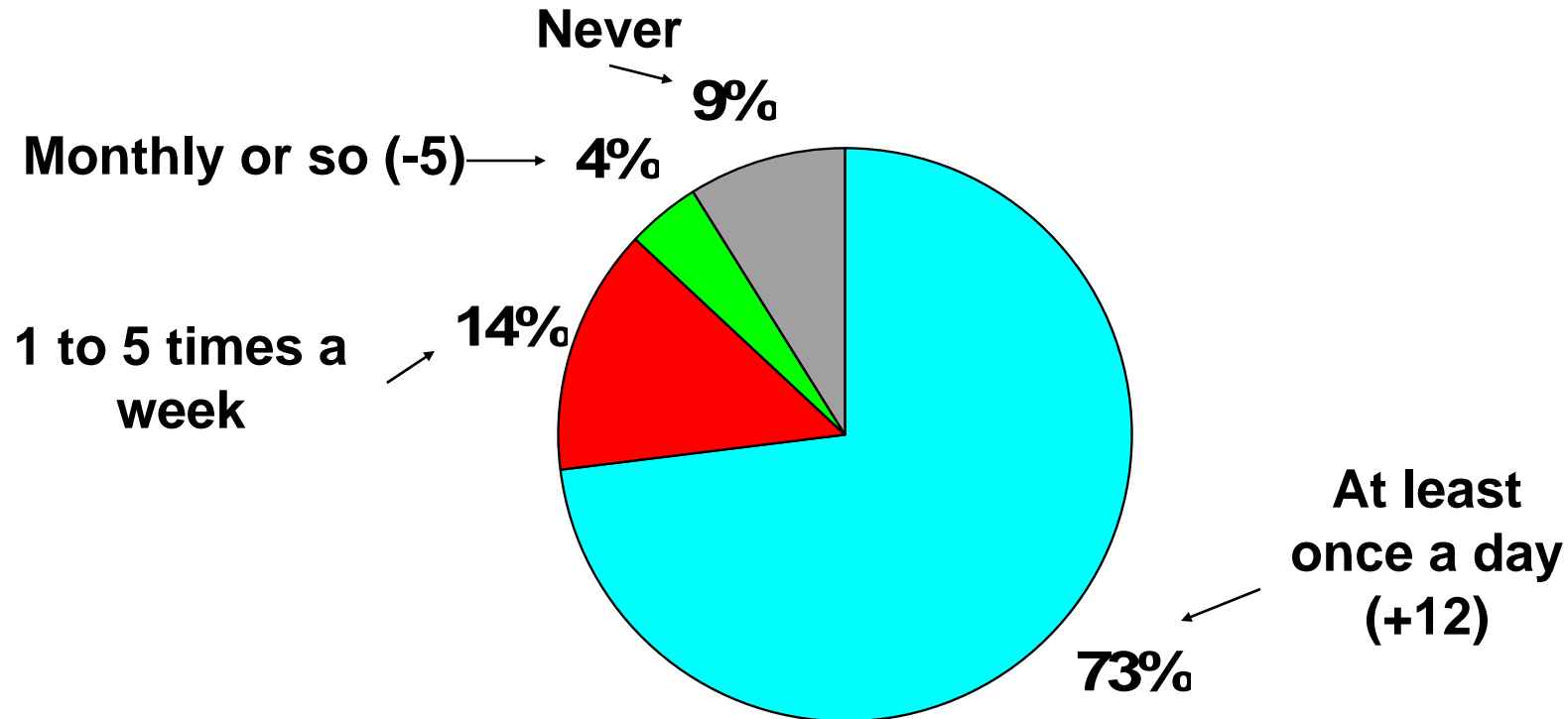
Key Findings

- **More residents, across all demographic groups, are regularly using the Internet - research and gathering information continue to top the list of online activities**
- **Many library programs show increased familiarity and usage since 2005**
- **iCONN users are generally younger, better educated, and have more income – most learned about iCONN through the library, school, or word of mouth**
- **iCONN non-users show interest in iCONN offerings: newspapers and magazines, health/wellness resources, history resource center, and science resource center**



Internet Usage in Connecticut

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



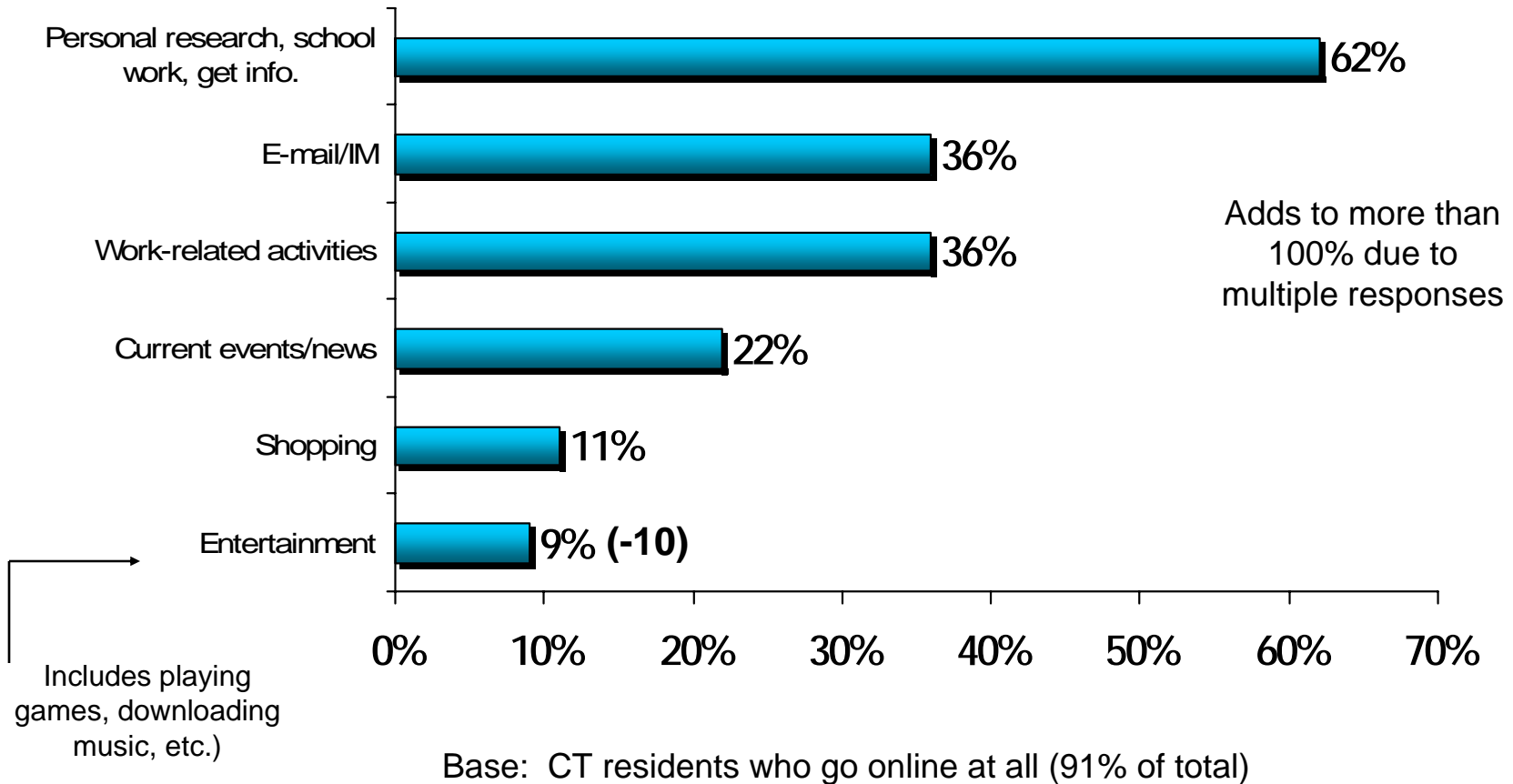
Base: all Connecticut residents

Note: Numbers in parentheses indicate a significant change from 2005.



What's Being Done On-line

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



Note: Numbers in parentheses indicate a significant change from 2005





Internet Use to Obtain Information

90% have used a computer to obtain information online

MOST prevalent among:

- * Better educated (at least some college) = 95%
- * Upper income (HHI \$75,000+) = 99%
- * Younger (18 - 34 years old) = 99%

LEAST prevalent among:

- * Lower income (HHI < \$40,000) = 68%
- * Older (aged 55+) = 76%
- * Less educated (high school grad or less) = 85%

**Still fairly
high levels**

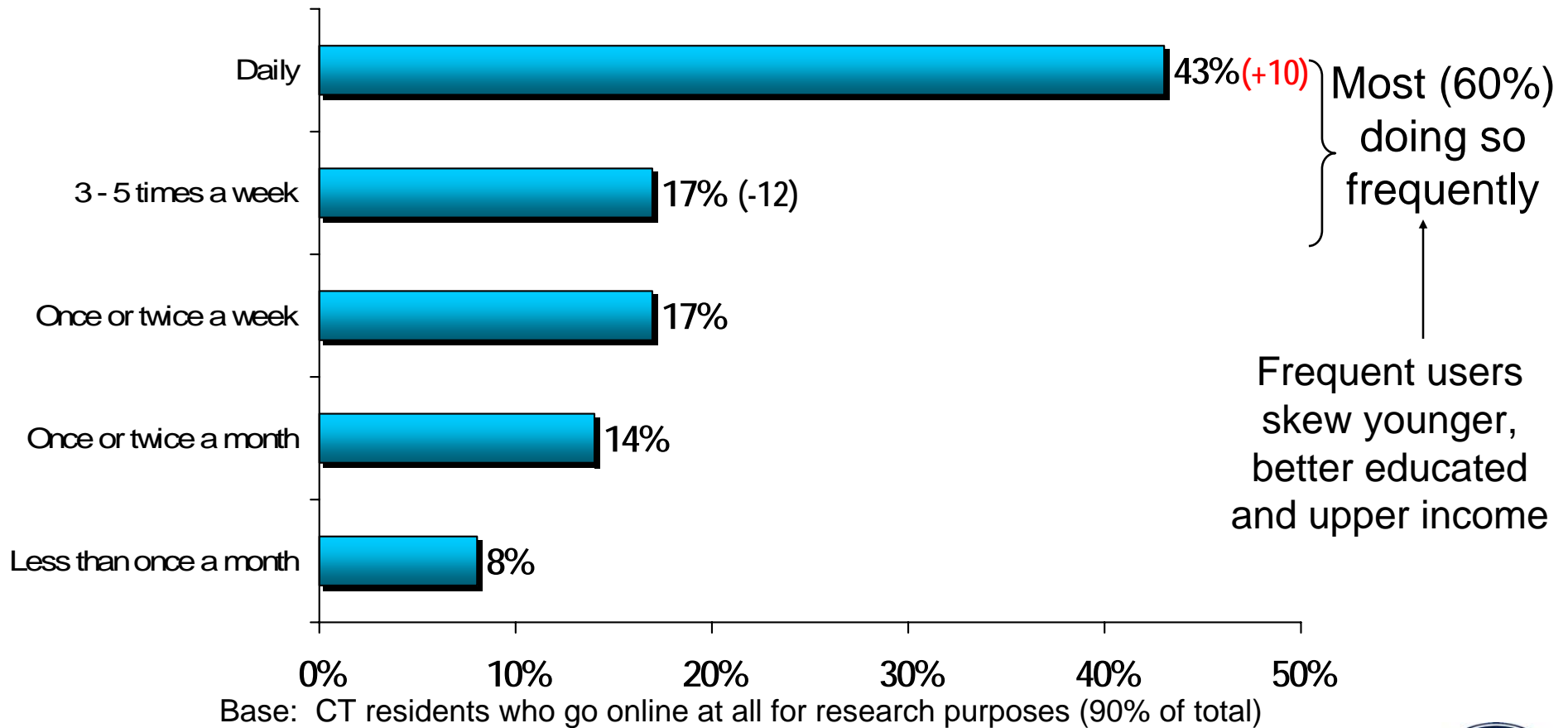
Base: all Connecticut residents





Frequency of Online Usage - Research

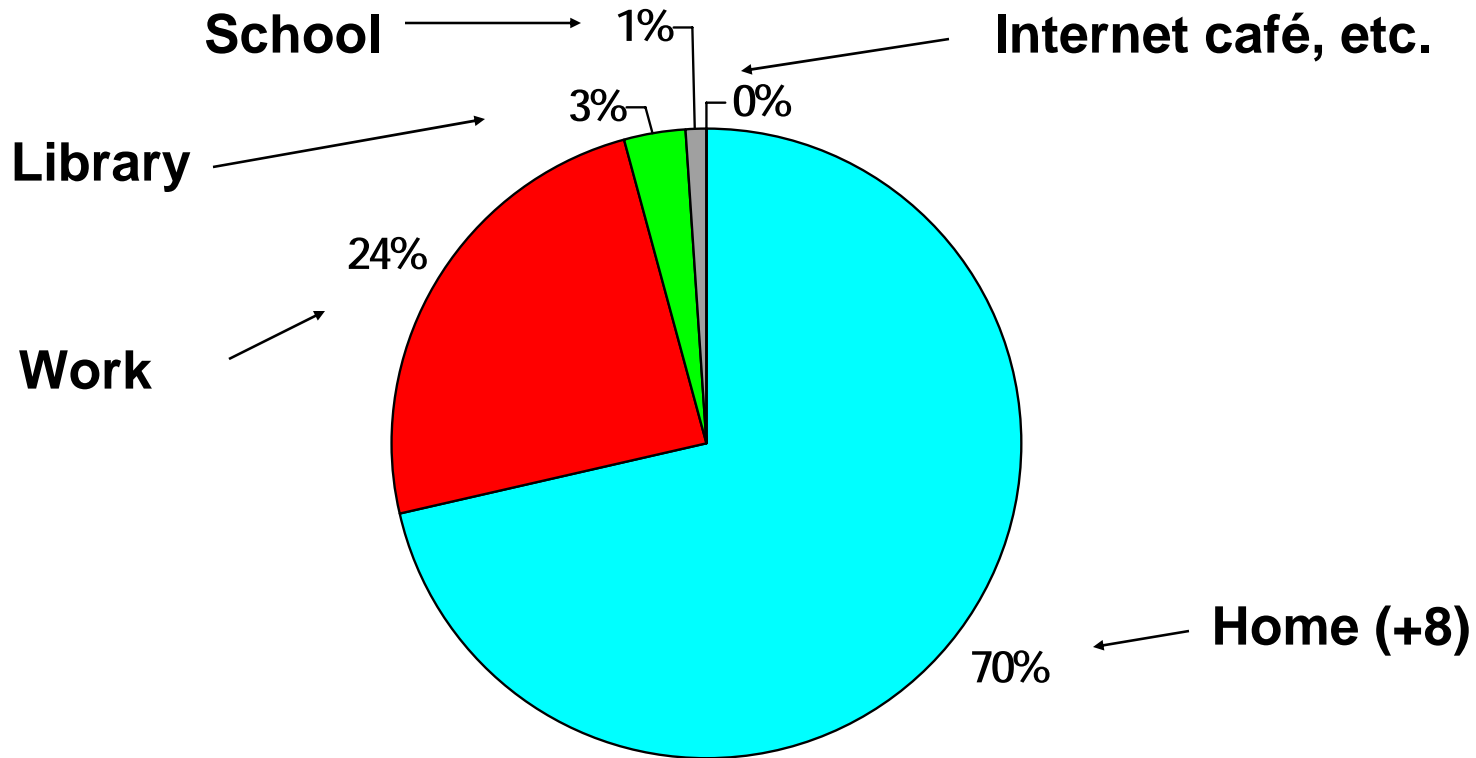
Question: *How often do you go on-line for research or informational purposes?*





Location of Online Research

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



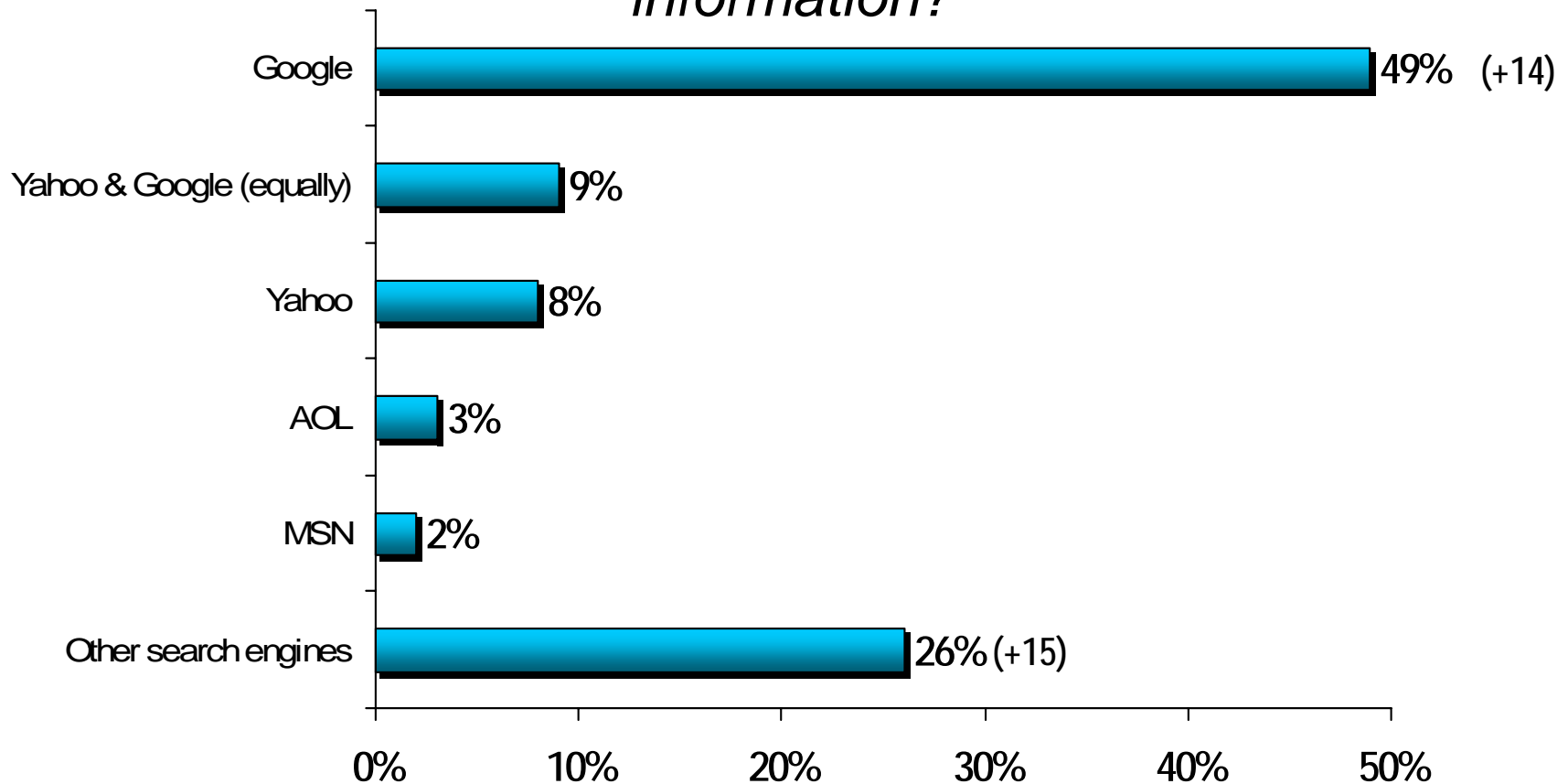
Base: CT residents who go online at all for research purposes (90% of total)

Note: Numbers in parentheses indicate a significant change from 2005



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 (90% of total)

Note: Numbers in parentheses indicate a significant change from 2005





Type of Research Being Done

- 17% health research
- 15% financial/business research
- 10% general research
- 8% news/current events
- 7% product research (before buying)
- 5% travel related
- 5% hobby related
- 4% science information
- 4% school research
- 3% searching for articles from magazines, etc.
- 3% educational related

No one
type of
research
dominates

Base: CT residents who go online at all for research purposes (90% of total)



Top 3 Reasons for Conducting Research Online

#1 → *** FAST (74%) (+13)**

Adds to more than 100%
due to multiple responses

*** CONVENIENT (42%)**

- **Can access from home (23%)**
- **Available 24/7 (15%)**
- **Can access from work or school (4%)**

*** VARIETY OF SOURCES (26%)**

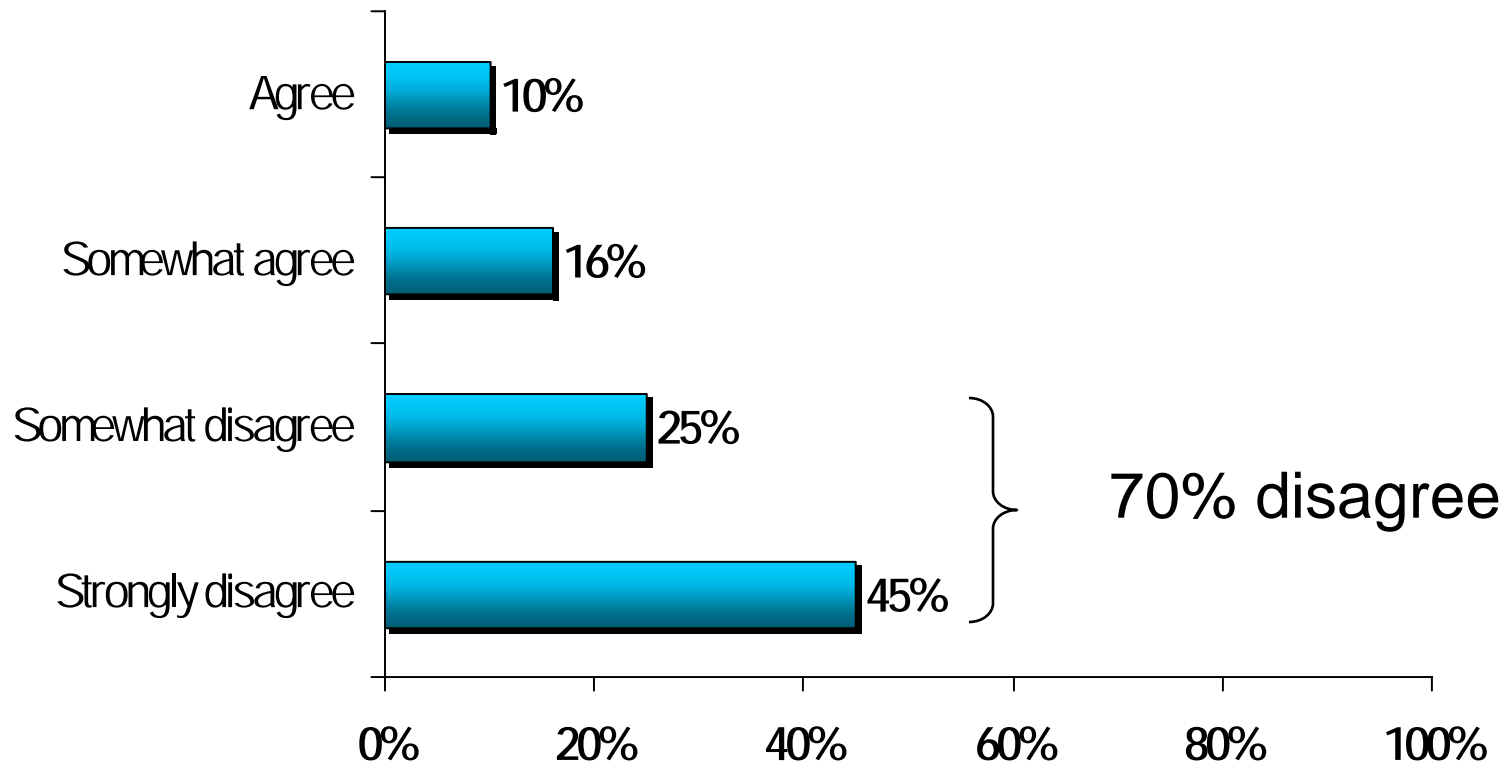
- **More resources to tap into (21%)**
- **More viewpoints offered (5%)**

Base: CT residents who go online at all for research purposes (90% of total)



Online Information is Easily Accessible

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



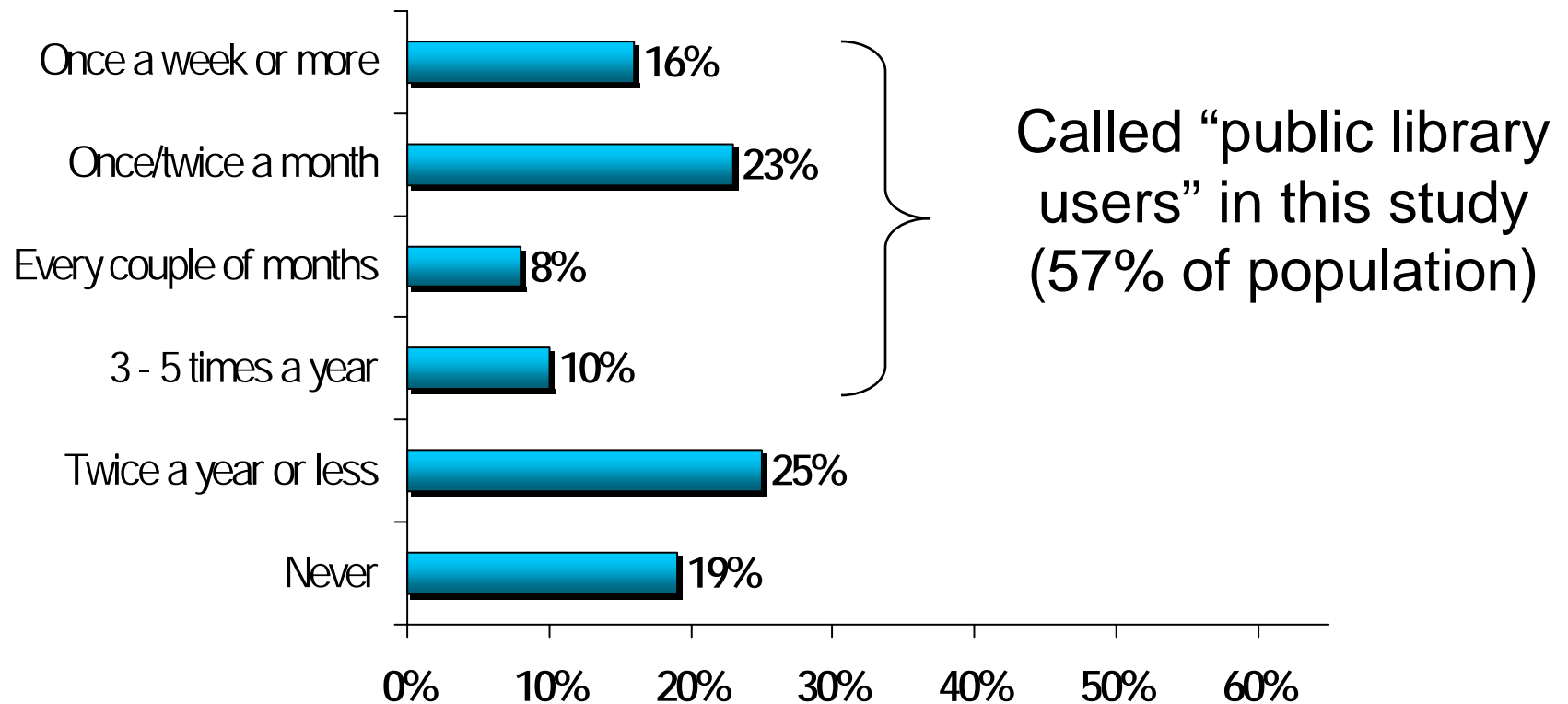
Base: CT residents who go online at all for research purposes (90% of total)





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	27%	49%	45%





Public Library Usage – By County

✦ Only Fairfield County shows significantly more usage than Hartford County

	Fairfield County	Hartford County	New Haven County	Other Counties
Use public library once a <u>month</u> or more	46%	33%	42%	37%

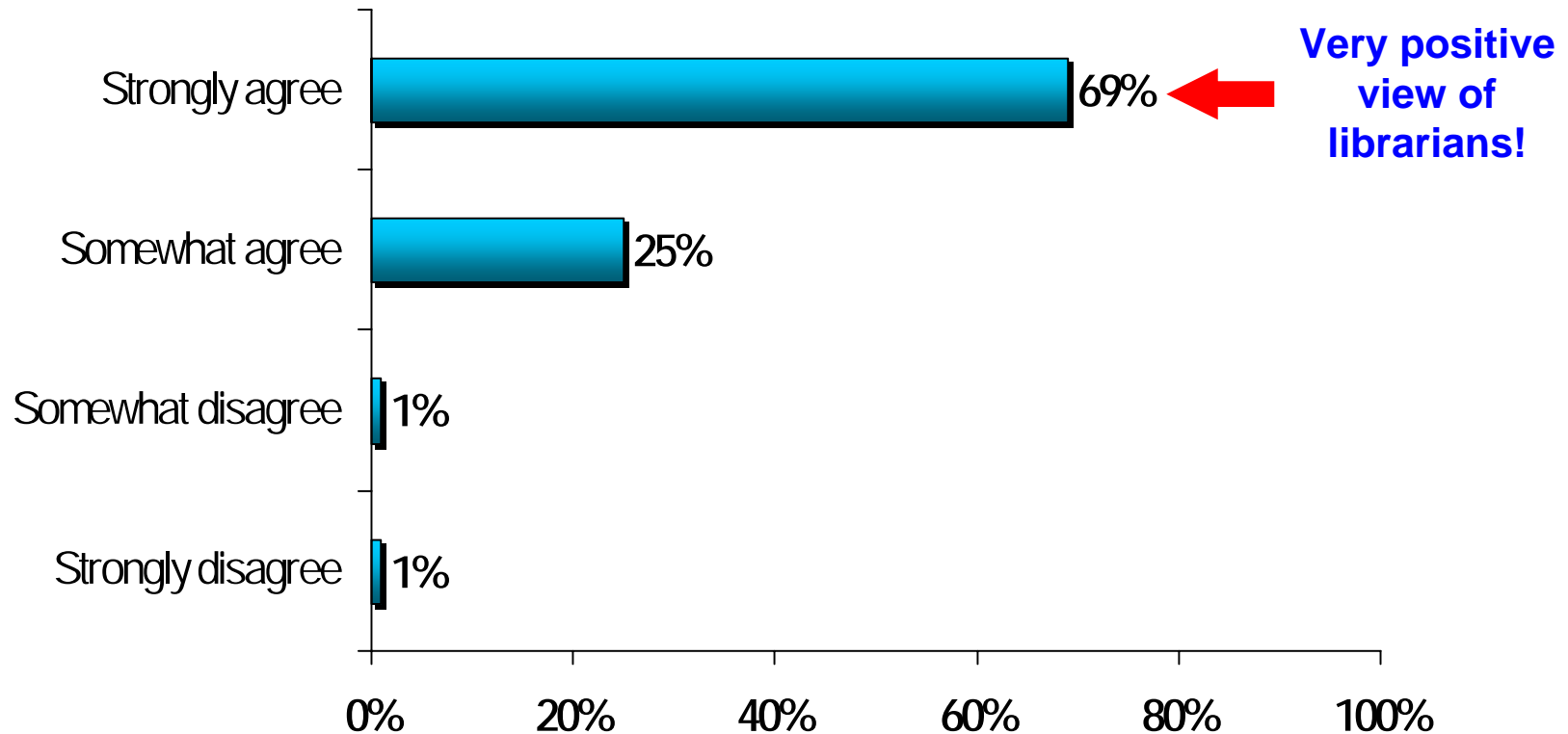
Note: We had 113 respondents in Fairfield County, 141 in Hartford County, 95 in New Haven County and 141 in all other counties combined





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*

	Librarians	Internet
Strongly agree	69%	35%
Somewhat agree	25%	45%
Somewhat disagree	1%	9%
Strongly disagree	1%	3%
Not sure	3%	9%

Base: general public



Familiarity/Usage

- * In the study, we measured familiarity with and usage of the following library services:**
 - Public library website**
 - Interlibrary loan**
 - Connecticard**
 - reQuest**
 - iCONN – Connecticut’s RE-search Engine**



Usage of Library Services

	General Public		Library Users	
	2007	2005	2007	2005
Familiar with Interlibrary Loan	37%	30%	47%	42%
Have used Interlibrary Loan*	35%	29%	49%	41%
Have used public library's website	29%	20%	42%	30%
Familiar with Connecticard program	14%	12%	17%	13%
Have used Connecticard program*	19%	15%	29%	23%
Familiar with reQuest program	8%	6%	11%	7%
Have used reQuest program*	10%	7%	15%	12%

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

* Asked after being read a description of the program





Awareness/Usage of iCONN/CT's RE-search Engine

	General Public		Library Users	
	2007	2005	2007	2005
Heard of iCONN/Connecticut's RE-search engine	14%	14%	15%	17%
Have used iCONN/Connecticut's RE-search engine*	7%	5%	10%	7%

40% of iCONN users use iCONN at least once a month

* After being read a description of iCONN



Who uses iCONN?

iCONN users are:

- **Younger**
- **Better educated**
- **Have a greater income**
- **Teachers, Engineers, and Students**

Base: iCONN users





How Did They Hear About iCONN

Library (35%)

- * From librarian (28%)
- * From materials at library (7%)

Schools (25%)

- * College/school attending (24%)
- * From child's school (1%)

Word of mouth (26%)

- * Coworkers (17%)
- * Friends, neighbors (9%)

Internet (9%)

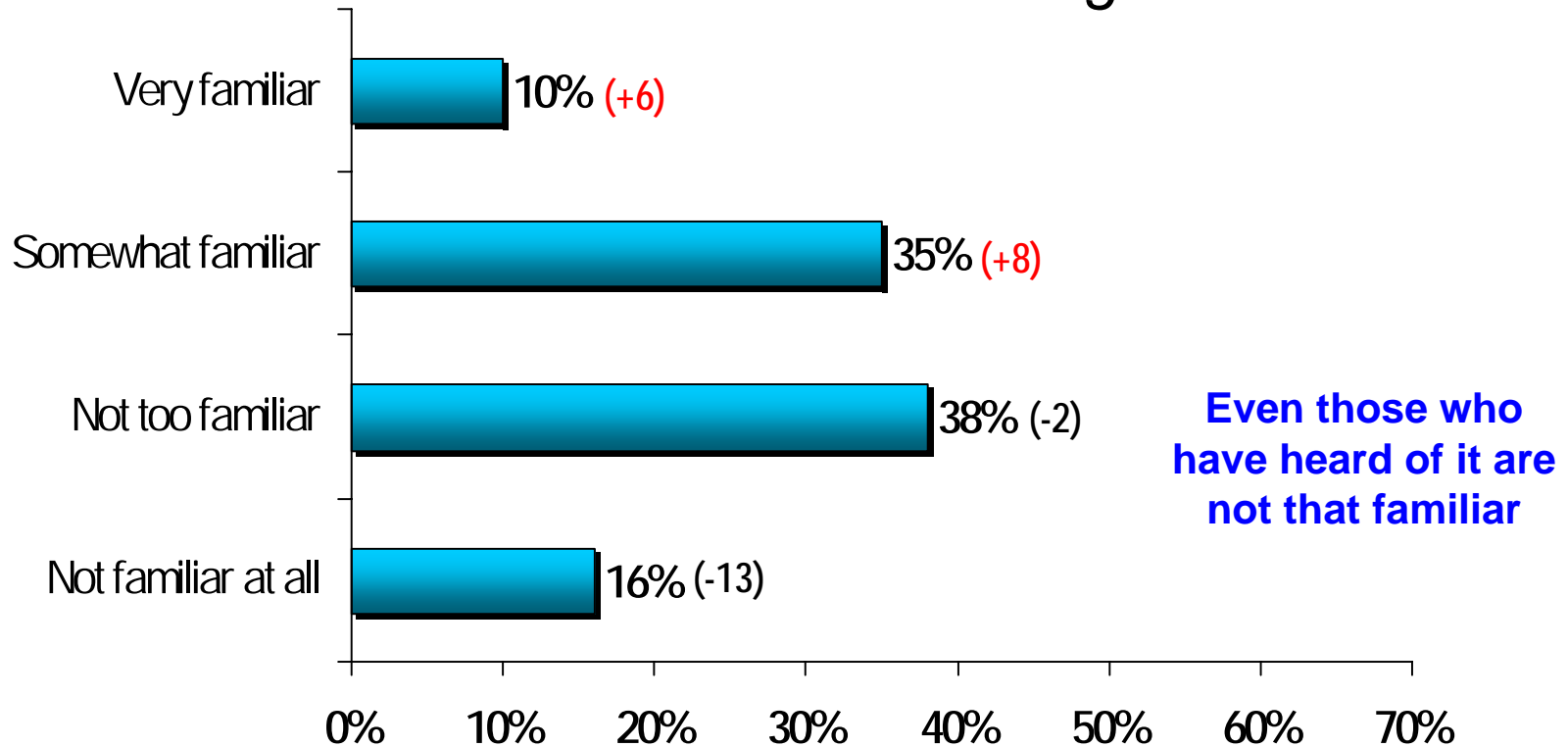
- * iCONN site (1%)
- * Other website led them to iCONN (8%)

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 –
Connecticut's RE-search Engine?



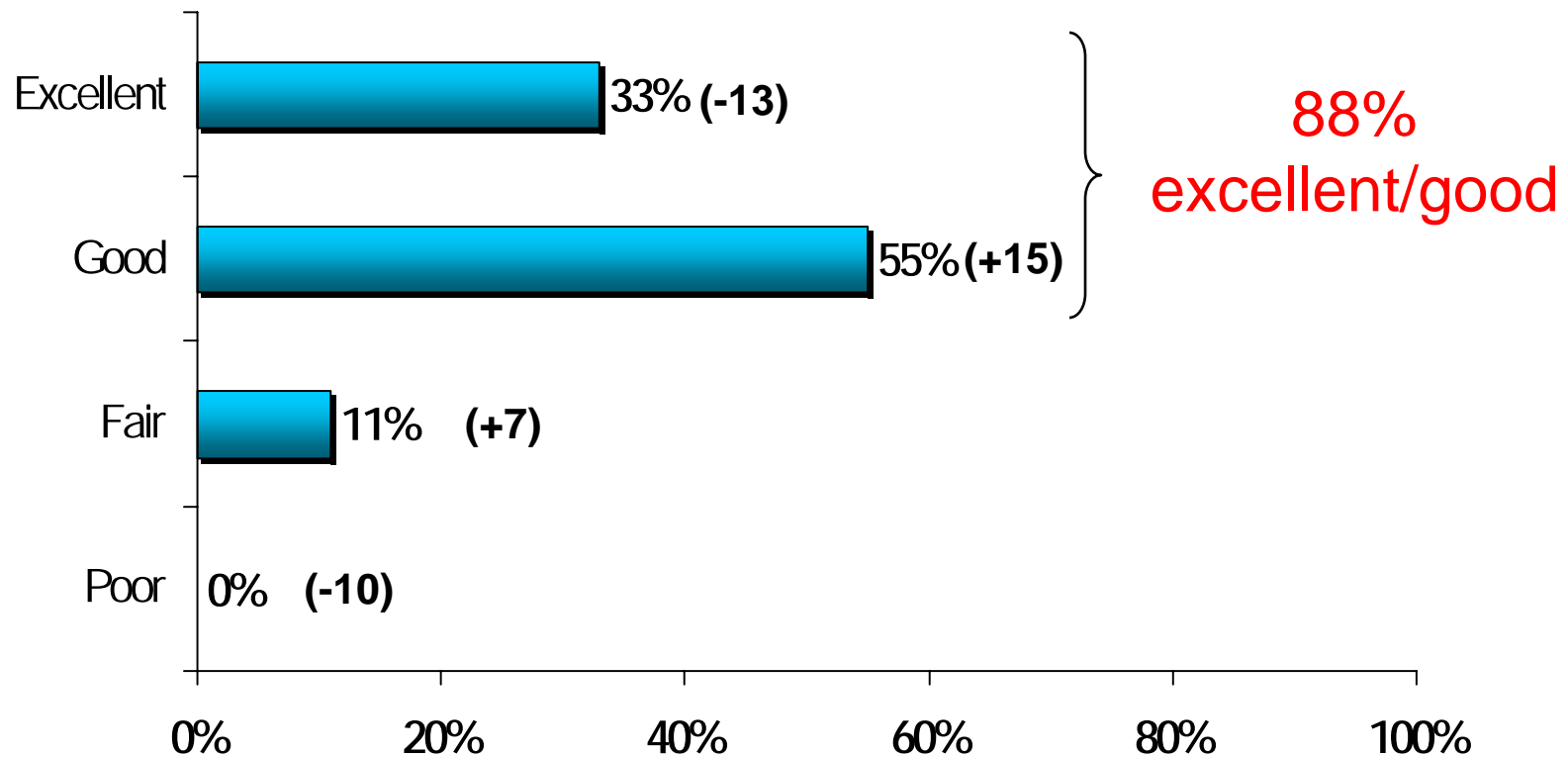
Base: Among those who have heard of it (14% of public)

Note: Numbers in parentheses indicate a notable change from 2005



Very Positive Overall Ratings

Question: Overall, how would you rate iCONN – Connecticut's RE-search engine, based on your experience with it?



Base: iCONN users

Note: Numbers in parentheses indicate a notable change from 2005





Very Positive Overall Ratings (continued)

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

96% say they are satisfied !!

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

90% say they would recommend it !!

Base: iCONN users





iCONN Resources Used

Specific Mentions

- 33%** general information
- 29%** library catalog
- 24%** online newspapers
- 11%** scholarly journals
- 11%** health/wellness resource center
- 10%** online magazines
- 10%** history resource center

Base: iCONN users





For What Purpose Did You Use iCONN?

- 67%** schoolwork/coursework for self
- 29%** work/business
- 24%** personal research projects
- 11%** newspapers (for fun)
- 11%** schoolwork for someone else
- 9%** business research

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

- 57% have income of \$75,000+

* Female

- 60% are women

* Better educated

- 80% are college grads

* Library users

- 66% use the library at least once a month



iCONN Description (read to all respondents)


“Connecticut’s RE-search Engine, 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 ...?

	General Public	Library Users
 Very likely	25%	31%
Somewhat likely	36%	37%
Not too likely	14%	14%
Not at all likely	24%	16%

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

Base: never used iCONN before (86% of sample)



Strongest Interest in iCONN - Subgroups (above average interest)

Based on description read

% saying “VERY likely to use”

- * 32% among those who do online research often
- * 31% among library users
- * 30% among those with some college or more education
- * 29% among library card holders
- * 27% among those with an income of \$40,000+
- * **25% among general public (average)**





Least Interest in iCONN - Subgroups (below average interest)

Based on description read

% saying “VERY likely to use”

- ↓ * **25% among general public (average)**
- * **20% among those with incomes of < \$40,000**
- * **18% among those with a high school education or less**
- * **17% among non-library users**
- * **14% among non-library card holders**



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
Health and wellness center	41%	83%
Newspapers & magazines	41%	81%
Science resource center	40%	77%
History resource center	37%	78%
Library catalog	33%	72%
Genealogy resources	31%	65%
Business and company resource center	29%	66%
Associated Press photographs	21%	64%
Scholarly journals	18%	52%
Spanish language & bilingual mags	8%	18%

Top tier (rows 1-4)
Middle tier (rows 5-8)
Bottom tier (rows 9-11)

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



Interest in Specifics – by Subgroups

- * **Men** show more interest in history and science resources as well as Associated Press photographs

Very/somewhat interested in	Men	Women
History resource center	86%	71%
Science resource center	83%	72%
Associated Press photographs	71%	60%

Still strong interest among women

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 science resource center, online library catalog and genealogy resources

Very/somewhat interested in	With children under 18 at home	No children
Science resource center	85%	72%
Online library catalog	80%	67%
Genealogy resources	77%	58%

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+)
Genealogy resources	80%	64%	67%
History resource center	71%	85%	78%
Science resource center	71%	81%	80%
Spanish and bilingual mags	41%	13%	15%

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>	69%
<i>New York Times</i>	63%
<i>Wall Street Journal</i>	50%
<i>Boston Globe</i>	38%
<i>Washington Post</i>	33%
<i>LA Times</i>	20%
<i>Christian Science Monitor</i>	12%

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



Newspapers – Differences by Subgroup

* Greater interest among lower income

- *Hartford Courant* (79% for <\$75K v. 64% for \$75K+)
-

* Greater interest among younger/middle aged than older

- *New York Times* (68% for 18 to 54 v. 53% for 55+)
- *Hartford Courant* (74% for 18 to 54 v. 58% for 55+)



Interest in Specific Magazines Online

	% saying they think they would use iCONN to access
Consumer Reports	80%
Health magazines	71%
News magazines, such as <i>Time</i>	71%
Popular magazines for general interest, travel, hobbies	68%
Science and technology mags	57%
Business and economics mags	45%
Literature magazines	35%
Law magazines	26%

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





Magazines – Differences by subgroup

- ✦ **Greater interest among men than women**
 - **Business and economic mags (55% for men v. 36% for women)**

- ✦ **Greater interest among women than men**
 - **Health magazines (80% for women v. 61% for men)**
 - **Popular magazines (73% for women v. 61% for men)**
 - **News magazines (78% for women v. 61% for men)**
 - **Literature magazines (40% for women v. 28% for men)**



Magazines – Differences by subgroup

✦ **Greater interest among those with children than those without children**

- Popular magazines (79% for those with children v. 59% for those without)

✦ **Greater interest among younger/middle aged than older**

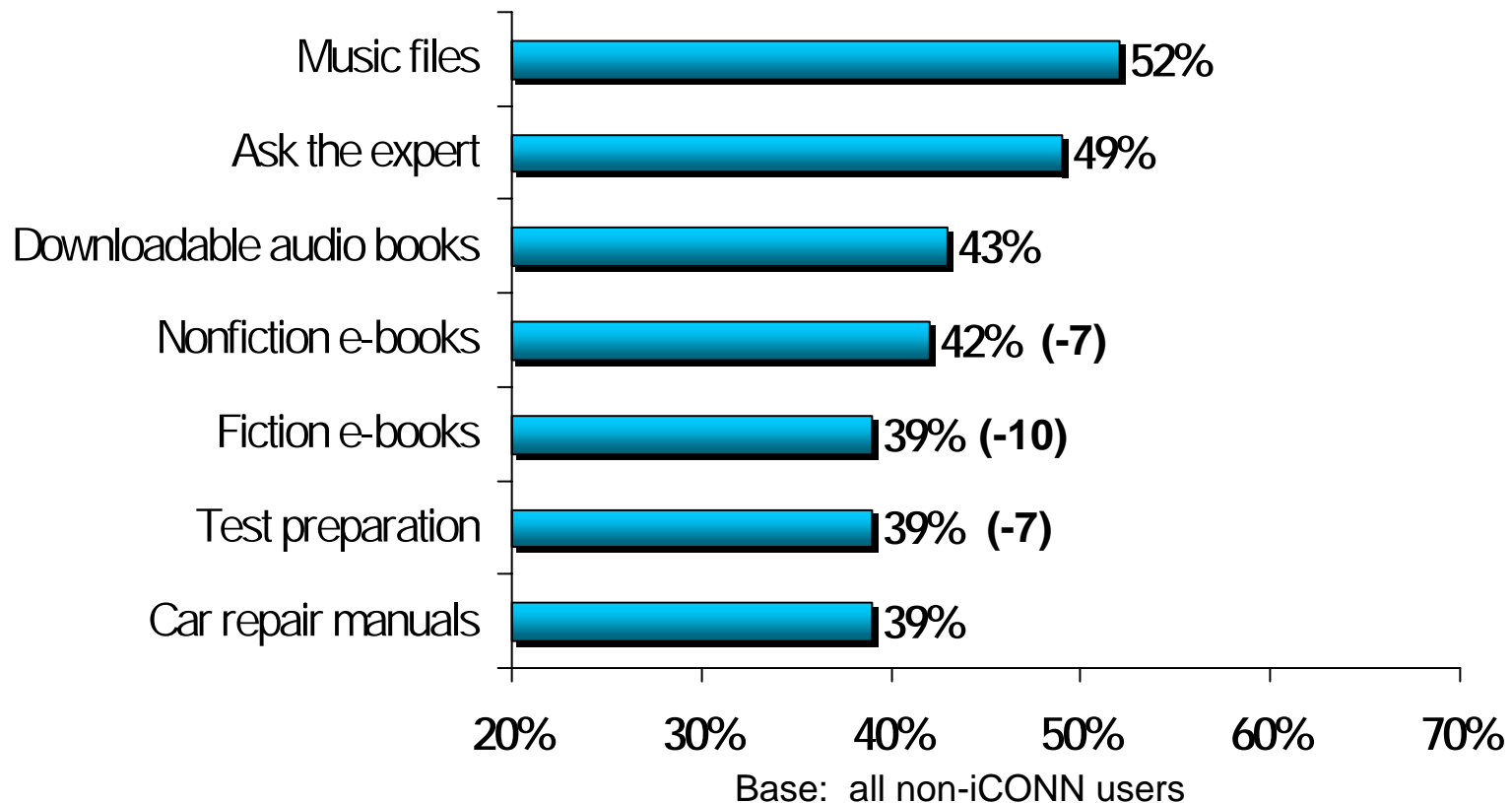
- News magazines (74% for 18 to 54 v. 61% for 55+)
- Popular magazines (73% for 18 to 54 v. 50% for 55+)
- Science magazines (58% for 18 to 54 v. 46% for 55+)
- Law magazines (27% for 18 to 54 v. 17% for 55+)



Interest in Other Offerings

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

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



Note: Numbers in parentheses indicate a significant change from 2005



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 of these possible offerings show much more interest among households with children than they do for households without children**
- * Online car repair shows a strongly male skew (49% among men v. 31% among women)**



Motivating Them to Use iCONN

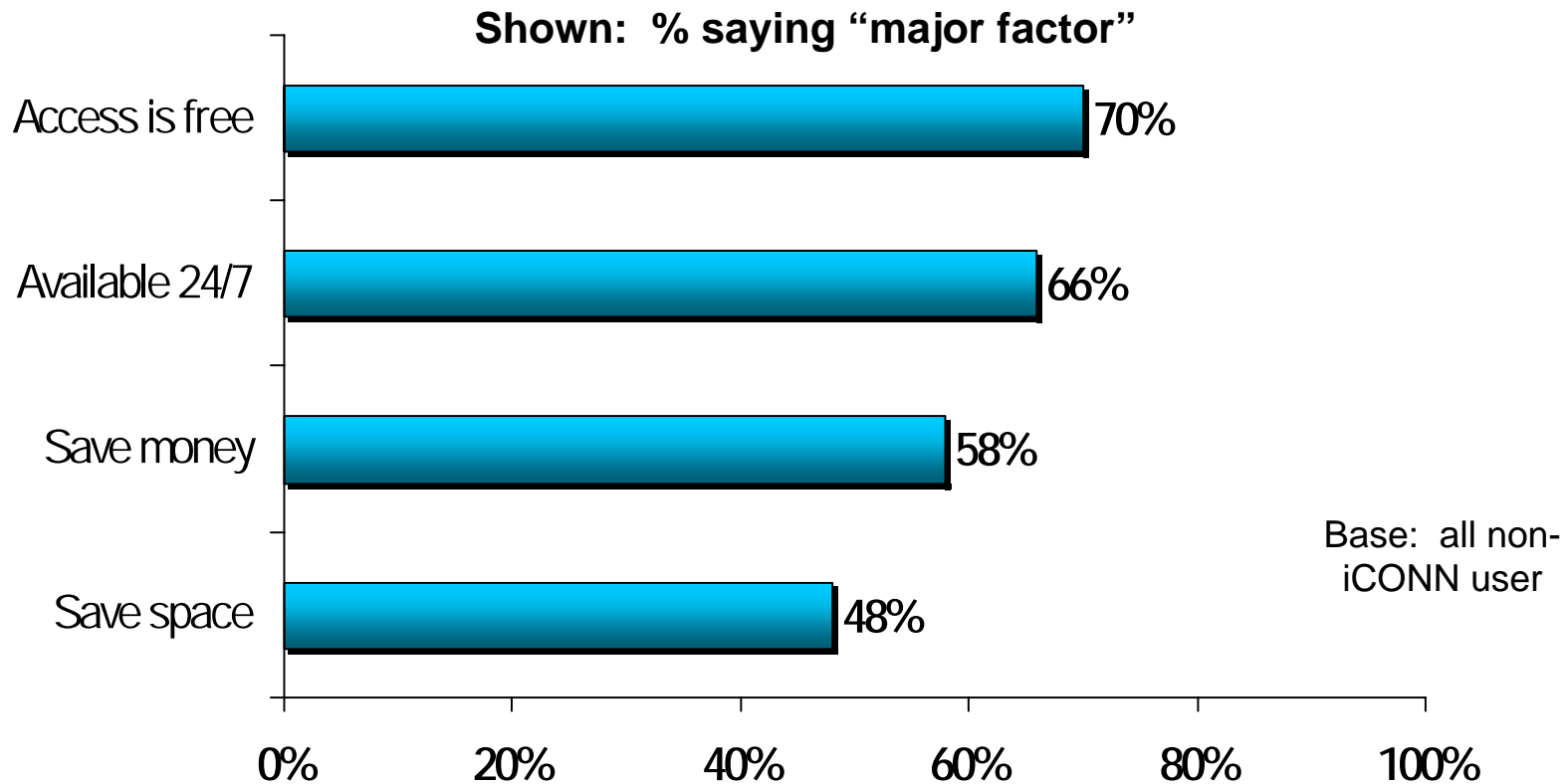
✳️ **Four themes were tested to see how strong of a factor they might be in motivating iCONN usage ...**

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

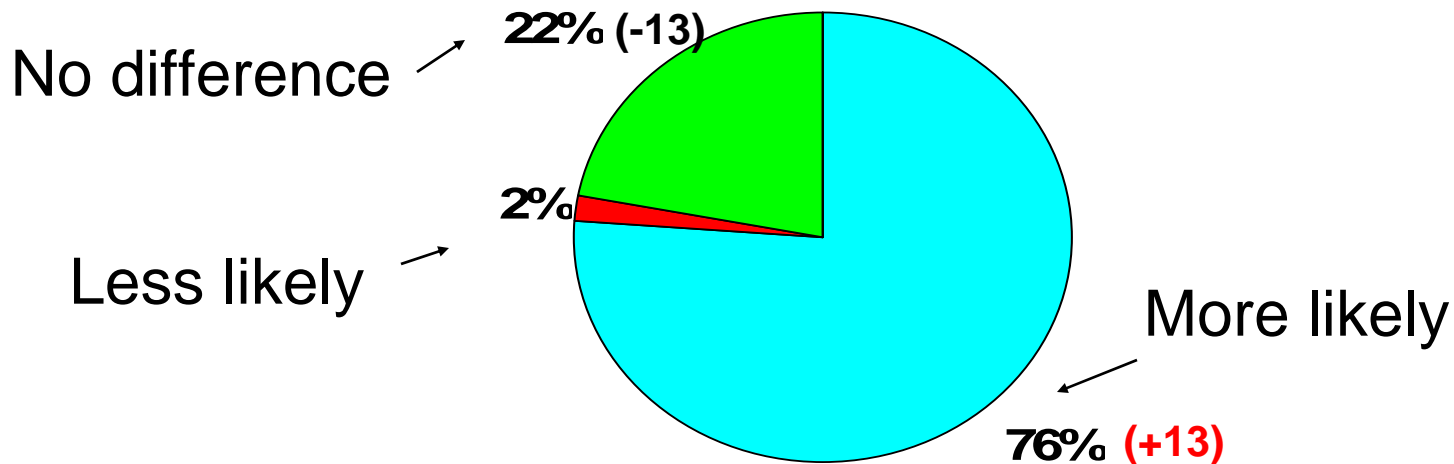
Question: Think for a moment about what might motivate you to use iCONN. For each of the following, please tell me if you see it as a major factor, minor factor or not a factor at all in possibly motivating you to use iCONN?





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

Note: Numbers in parentheses indicate a significant change from 2005



Significant Room for Growth

- * This research suggests that there is significant room for marketplace growth for iCONN
 - Familiarity and usage continues to be low
 - Yet, interest is relatively high
 - ⇒ 25% of CT residents who have not used iCONN express strong interest in it (1 in 4 state residents)



iCONN Growth Will Start (Mainly) With Specific Demo Groups

Most likely to use first (above average interest):

- * Those who do online research often
- * Library users
- * Those with some college or more education
- * Library card holders
- * Those with higher income (\$40,000+)

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



Hardest Groups To Penetrate

Less interest:

- * Those with incomes of < \$40,000
- * Those with a high school education or less
- * Non-library users
- * Non-library card holders

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 very satisfied with the iCONN service**
- * Repeat usage seem assured, based on the high satisfaction ratings**
 - Once users are in, they 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 (40% or higher). Hence, all are worthwhile additions**
 - **Music files (52%)**
 - **“Ask the Expert” (49%)**

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.



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

- * This research suggests people who are doing research online now (90% 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



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**

✧ **Science resource center**

✧ **History resource center**



How To Market iCONN (continued)

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

Special appeal among men

- History center
- Science center
- AP photographs
- Business magazines

Special appeal among women

- Health magazines
- News magazines
- Popular magazines
- Literature magazines

Special appeal among households with children

- History center
- Science center
- AP photographs
- Popular magazines



How To Market iCONN (continued)

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

Special appeal among lower income households

- Genealogy resources
- Bilingual magazines
- *Hartford Courant*

Special appeal among higher income households

- History center
- Science center

Special appeal among younger/middle aged

- *Hartford Courant*
- *New York Times*
- News magazines
- Popular magazines
- Science magazines
- Law magazines



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)



For More Information On This Study

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