iCONN Market Survey:

Measuring Current Awareness, Usage and Interest

Commissioned by:

Connecticut State Library

Conducted by:

CSRA
Center for Survey Research & Analysis
at the University of Connecticut

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Table of Contents

Background and Methodology

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Study Background and Objectives

The Connecticut State Library commissioned the Center for Survey Research and Analysis (CSRA) at the University of Connecticut to conduct a statewide survey to help them understand perceptions of iCONN in the marketplace. Specific objectives of the study were to:

- Collect background information on online usage and habits in the state
  - With particular emphasis on online research and information gathering
- 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 *current* offerings are most appealing?
  - What *potential* offerings are most appealing?
- Gain insight into how to best market iCONN

Methodology

Five hundred telephone interviews were conducted in October and November, 2005. The sample utilized (RDD – random-digit-dial sampling) is representative of households statewide. Given the sample size and sampling design, the results of the survey (at the total level) are representative of the statewide adult population, with a margin of error of $\pm$4.5%.

Interviews lasted 15 minutes, on average, and were conducted by the trained interviewers at CSRA's phone center on the University of Connecticut campus in Storrs, CT.

Study Findings

I. Internet Habits Among Connecticut Residents

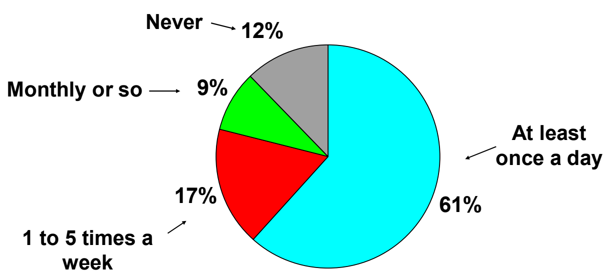
In the survey, we explored the internet habits of state residents – how often they are on-line, what they do online, do they do any research or information gathering online, etc.

Internet Usage - General

Just about all CT state residents, 88%, use the Internet. 61% use it daily.

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

Subgroups most likely to be online (for any reason): younger adults, better educated, higher income, those with children at home and men.

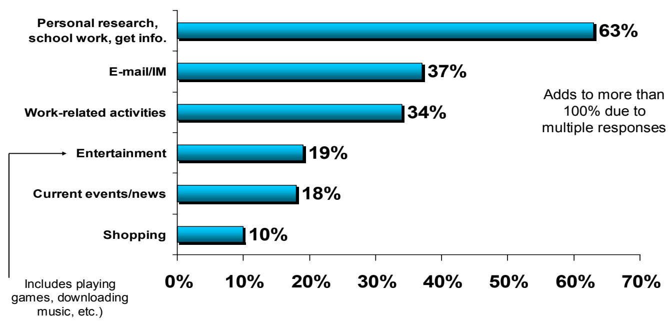
Base: total sample	Online at least once a week (for any reason) %
Age	
18 – 34	88 (H)
35 – 54	81
55+	61 (L)
Household Income	
Under $40,000	58 (L)
$40,000 to less than $75,000	83
$75,000 +	91 (H)
Gender	
Male	83 (H)
Female	72 (L)
Educational Attainment	
High school or less	64 (L)
Some college	90
College graduate	93 (H)
Children (under 18) at home	
Have children at home	89 (H)
No children at home	70 (L)

Significant differences: (H) = highest for category; (L) = lowest for category

Residents report a wide variety of primary online activities. Interestingly, research and information-getting top the list, with 63% of CT residents who go online reporting this as a primary online activity. This includes research and information getting for one's own schooling or coursework, schoolwork being done with children, and other personal reasons. Personal reasons include things such as auto research before buying a car, hobby-related research (getting recipes), looking for a restaurant or making travel plans, etc.. No other single online activity comes close.

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)

Using The Internet To Obtain Information/Do Research

80% of state residents report using a computer to obtain information or do some sort of research on-line. This activity is fairly prominent across all subgroups. However, as expected, certain groups report a higher prevalence of this online research/information getting than do others.

Most prevalent among:

- Better educated (college graduates) = 96% report obtaining information online
- Upper income (household income $75,000+) = 95%
- Younger (aged 18 to 34) = 91%

Least prevalent among:

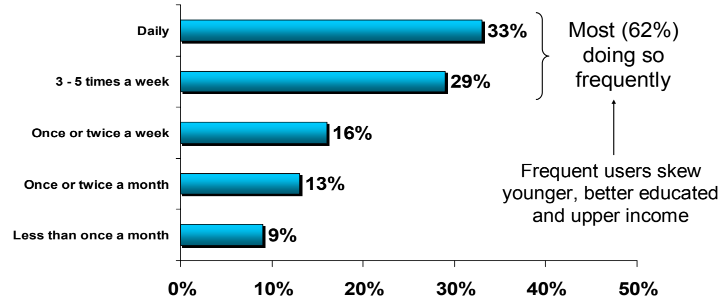
- Lower income (household income less than $40,000) = 60% report obtaining information online
- Older (aged 55+) = 65%
- Less educated (high school graduate or less) = 67%

However, even among the groups where online research is less prevalent, we still find over half conducting research online.

Among state residents who conduct research and information-getting online (80% of the general public), most do so frequently. 62% report doing so at least three times a week.

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)

When asked from what location they primarily go online to conduct research and information-getting, "home" is the main answer. 62% go online from home to access information, while 26% do so from work. Only 4% do so primarily from the library.

Marketing insight: There is clearly a great deal of interest in obtaining information online. iCONN will be tapping into a population that is used to and interested in obtaining information online.

Younger, better educated and higher income residents are the most "primed" for this type of research.

Currently, Connecticut residents turn to popular search engines when doing research and gathering information online. They generally turn to Google and Yahoo.

No one type of online research dominates. Connecticut residents who search for information online are doing research in a wide variety of areas.

Type of Research Being Done Online

No one type of research dominates

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

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

When we asked respondents who go online for research purposes to name the key benefits of doing research online, three themes came through loud and clear:

Theme #1: Fast (61% said this)

- This is, clearly, the best thing about online research. Respondents feel doing research online saves them a great deal of time. Once they know what they are doing, it is instantaneous.

Theme #2: Convenient (43% said this)

- They also appreciate the convenience of on-line research. They can access information from home, work or school. And, they can access it 24 hours a day, 7 days a week.

Theme #3: Variety of sources (26% said this)

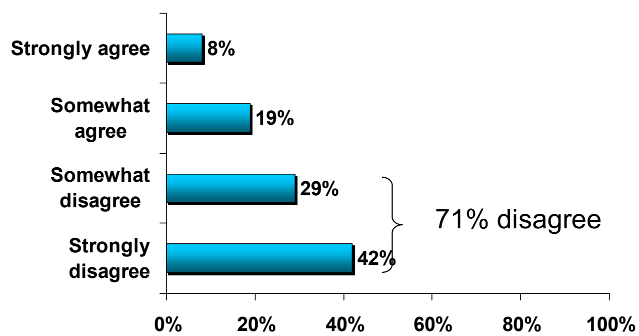
- About 1 in 4 said the variety of sources was a key aspect of on-line research – allowing them to tap into different resources and get different viewpoints.

<u>*Marketing insight*</u>: These broad themes are useful to include in marketing materials

Online researchers feel successful in whatever they are currently doing to obtain information online. 71% say they currently have no difficulty finding information online.

Online Researchers Feel Successful

Question: Agree or disagree: I have <u>difficulty</u> finding the information that I need online?



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

<u>*Marketing insight*</u>: This self satisfaction might keep many people from feeling the need to switch to different online information sources (such as iCONN). iCONN will need to prove its advantages over research via basic search engines.

Interestingly, there are significant differences by age regarding the degree of expressed difficulty in finding information on line (via current methods). While majorities in all age groups disagree that it is difficult to find information online via their current methods, this attitude is a bit more subdued among older age cohorts. Residents over 35 are more likely to express some difficulty in currently finding information online than are their younger counterparts – as high as 1 in 3 among those aged 35 to 54.

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

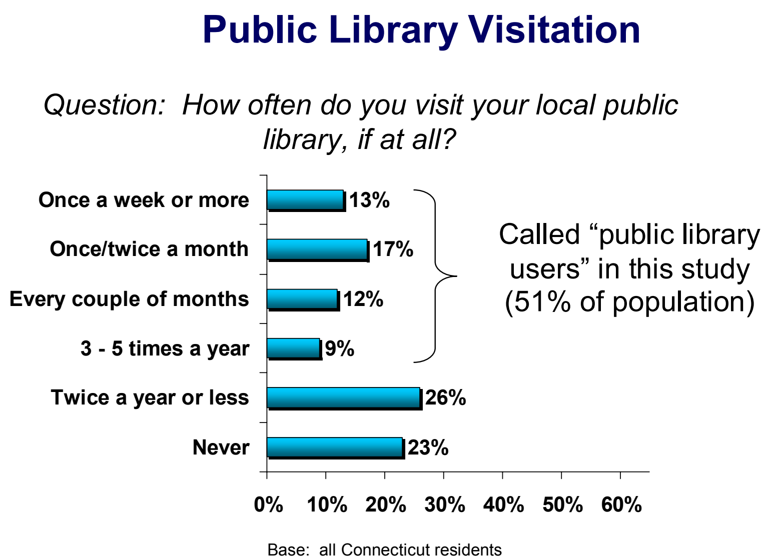
	18 to 34 %	**35 to 54 %**	**55+ %**
Agree	16	34	27
Disagree	82	65	68

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

II. Awareness and Usage of Library Services

Public Library Visitation

51% of state adult residents visit a public library three or more times a year. For this study, we called this group "public library users" and have analyzed the results of the survey by this group. In addition to this group, 26% of residents are infrequent users, visiting a public library twice a year or less. Finally, almost 1 in 4 residents (23%) never visit a public library.



There is a significant difference in public library usage by educational attainment. Residents with at least some college education are much more likely to visit a public library than are those who have never attended college.

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 month or more	22%	40%	40%

There are more moderate differences by age and children in the home. Younger state residents (aged 18 to 34) and those with children at home are somewhat more likely to use public libraries than are older residents and those without children.

❋ **Somewhat greater usage among 18 to 34 year olds**

	18 - 34	35 - 54	55+
Use public library once a month 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 month or more	**35%**	**28%**

There are no significant differences in public library usage by county.

Public Library Usage – By County

	Fairfield County	Hartford County	New Haven County	Other Counties
Use public library once a month 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 With and Usage of Library Offerings

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

- Public library website
- Interlibrary loan
- Connecticard
- reQuest
- iCONN/CT Digital Library

Of all the library services tested, interlibrary loan was the most well known and most utilized. reQuest and iCONN were the least utilized. For most services, library users are more likely than the general public to be familiar with them and use them.

Note: in all charts and tables, "general public" refers to the total sample, which includes both library users and nonusers.

Familiarity/Usage of Interlibrary Loan

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

* 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"

Usage of Public Library Website

	General Public	Library Users
Have used public library's website	20%	30%

Familiarity/Usage of Connecticard Program

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

* 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"

Marketing insight: There's room for improvement regarding familiarity. Promotional campaigns to increase awareness for these services are warranted.

iCONN Awareness and Usage

A relatively small proportion of state residents have heard of iCONN (also referred to in the study as the Connecticut Digital Library), and even fewer have ever used it.

Awareness/Usage of iCONN/ CT Digital Library

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

* 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 …"

Interestingly, we did not find very large differences in awareness by subgroup – with two moderate exceptions:

#1. Public library users are more likely to have heard of iCONN than non-library users (17% awareness versus 10%, respectively).

#2. Young residents show the most familiarity with iCONN. Younger residents (aged 18 to 34) are more likely to have heard of iCONN than middle aged residents, with older residents falling in between (19% awareness among 18 to 34 year olds, versus only 8% for 35 to 54 year olds and 14% among those aged 55+).

There are significant differences in iCONN awareness by county. The highest levels of iCONN awareness are evident in New Haven county, while Fairfield and Hartford counties lag behind.

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

Marketing insight: Increased communications are warranted to raise iCONN awareness. Need to review what factors may be at work helping to raise awareness in New Haven county, and replicate them elsewhere (especially in Fairfield and Hartford counties).

There are four general ways that people have heard about iCONN – and the first three clearly dominate.

#1. *Via the library* (30% of those who heard of iCONN learned about it via the library)
- Directly from librarians (20%) or via materials available at the library (10%)

#2. *Via schools* (29% of those who heard of iCONN learned about it via schools)
- From college or school they attend or have recently attended (26%) or from child's school (3%)

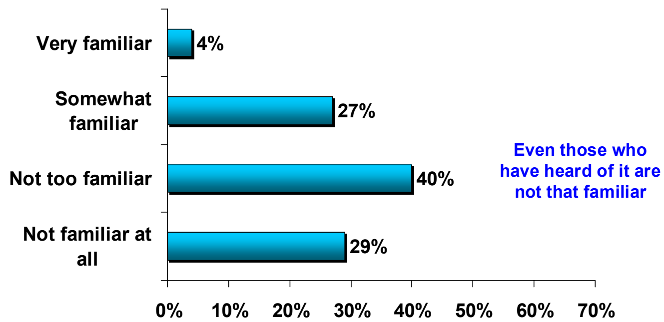
#3. *Via word of mouth* (25% of those who heard of iCONN learned about it via word of mouth)
- From friends, family and neighbors (17%) and coworkers (8%)

#4. *Via the Internet* (6% of those who heard of iCONN learned about it via the internet)
- First learned of it via the iCONN site itself (1%) or via other websites which directed them to iCONN (5%).

Importantly, even among the 14% of adult Connecticut residents who have heard of iCONN, most of them say that even though they heard of the service, they are not that familiar with it. Only 31% of the 14% (about 5% of the total population) report any real familiarity with it (these are essentially the users). The remaining two-thirds of those who have heard of it say that they have only simply heard of it – they are not that familiar at all with iCONN.

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 Versus Internet

Connecticut residents have a very positive view of librarians. Just about everyone, 95%, agree that librarians "provide accurate and reliable information". The positive view of librarians is consistent across subgroups. When the same is asked about the internet, we see that residents are much less trusting of information that they receive via the internet.

Librarians Versus Internet
(Librarians are much more reliable)

Question: Agree/disagree -- _____ provide(s) accurate and reliable information

	Librarians	Internet
Strongly agree	71%	33%
Somewhat agree	24%	48%
Somewhat disagree	1%	6%
Strongly disagree	0%	2%
Not sure	3%	8%

Base: general public

Even those who go online often for research do not see the internet as a terribly reliable source. Among this group, only 33% strongly agree and 52% somewhat agree that "the internet provides accurate and reliable information."

Marketing insight: Communicating iCONN as part of the state library system – being "librarian approved" – will distinguish it from other online information sources, making it much more reliable and trustworthy in the eyes of residents.

Concern About Equal Access to Information
Connecticut residents are concerned about the issue of all residents in the state having equal access to information. 94% agree with the statement "*I'm concerned about equal access to information; I want residents of all communities in Connecticut to be able to access quality information*." (68% *strongly* agree).

Marketing insight: Even if they never use it themselves, many state residents will support iCONN for social or public policy reasons – once they understand how it offers equal access to information to all state residents.

III. Feedback From iCONN Users

Note: due to the very low incidence of iCONN usage, we encountered only 26 iCONN users in our sample of 500 general public adult residents. While a sample of this size can still offer useful insights, the results are not statistically projectable. Results should be interpreted as qualitative.

Overall Reactions

Overall, it is very good news for iCONN. The feedback from users is quite positive.

- 86% of iCONN users rate their experience with iCONN as "excellent" (46%) or "good" (40%). Only 4% say "fair" and 10% say "poor".
- 100% of users say they are, all in all, satisfied with "the information found on iCONN."
- 96% would recommend it to others who need information.

Marketing insight: User satisfaction levels of this magnitude bode well for future use. Re-use should be high and word of mouth should help usage expand – once a critical base (a large enough user base) is established. iCONN has not yet reached a large enough base of users for word of mouth alone to have a substantial impact.

Uses of iCONN

When we asked users what iCONN resources they utilized, no single aspect of iCONN dominated. The online newspapers and magazines are the most utilized, with 37% of users saying they have read these resources online via iCONN. Specific iCONN resources mentioned as utilized by users are:

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

Purposes for logging on to iCONN are varied.

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

Demographic Profile of iCONN Users

iCONN users are distinguished from the general state population in four key ways:

- They have higher incomes
- They are skewed male
- They are better educated
- They are much more likely to have internet access at home

	iCONN Users %	General Public %
Household Income		
Under $40,000	6	26
$40,000 to less than $75,000	18	36
$75,000 +	➢75≺	37
Gender		
Male	➢64≺	49
Female	36	51
Educational Attainment		
High school or less	41	50
Some college	24	26
College graduate	➢35≺	24
Internet Access At Home		
Have internet access at home	➢98≺	75

➢ ≺ denotes significantly higher among iCONN users

IV. Interest Among Current Non-Users

Perhaps the most critical aspect of this study was to gauge interest in iCONN among current non-users. We suspected going in that current iCONN usage was quite small. Therefore, the key is to grow usage among those not currently using or even aware of iCONN.

<u>Interest in iCONN - General</u>

To fully introduce iCONN to those who had not yet used it, we read the following description:

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"

Based on this description, over one in five (22%) state residents who had never used iCONN before said they would be "very likely" to use iCONN in the future (29% among library users). Another 35% said they would be "somewhat likely" to use iCONN in the future (42% among library users). This is a very positive response.

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	22%	29%
Somewhat likely	35%	42%
Not too likely	18%	14%
Not at all likely	24%	14%

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

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

Marketing insight: The 22% ("very interested") is a useful figure for planning and targeting purposes. Survey responses tend to have a degree of exaggeration when measuring interest in new products/services. Adding in the "somewhat interested" figure would be misleading. Yet, 22% is still a significant number. There are about 2.6 million adults in Connecticut. 22% of them is about 570,000 people.

We then analyzed results among subgroups to find those groups with greatest interest. They key demographic variables driving interest are: history of doing online research, upper income, higher education, having children at home and being a library user already. Respondents with these characteristics reflect a stronger interest in iCONN.

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**

Marketing insight: We can expect growth to occur, at least at first, mainly among the groups that show the greatest interest. For the "biggest bang for the buck", marketing efforts should be directed at those groups.

Interest in Specific iCONN Offerings

After gauging interest in iCONN overall, we explored interest in the specific iCONN offerings among respondents who express *at least some degree* of interest in iCONN (about 71% of the total sample). The specific iCONN offerings tested were:

- *"An online library catalog listing the books and titles of over 400 public, academic and school libraries in the state."*
- *"Online access to genealogy resources – meaning resources for tracing one's family history"*
- *"Online access to newspapers and magazines"*
- *"Online access to scholarly journals"*
- *"Online access to Spanish language and bilingual magazines"*
- *"Online access to the Associated Press library of photographs"*
- *"Online access to a business and company resource center that includes company profiles, company performance ratings and investment reports."*
- *"Online access to a health and wellness resource center that includes access to journals and encyclopedias of medicine"*
- *"Online access to a history resource center that includes access to historical journals, atlases and maps"*

There is some degree of interest in all of the offerings tested. However, online newspapers, the health and wellness center and history resource center show the *most* overall interest, while scholarly journals and bilingual magazines show the *least* overall interest.

Interest in Specific iCONN Offerings

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

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

There are significant differences by demographic subgroups.

- *Men*: express greater interest in the History Center and Business Center than do women.
- *Women*: express greater interest in the Health and Wellness Center than do men.

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

- *Those with children*: express greater interest in the online catalog and AP library of photos than do households without children (school projects, perhaps?).

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

- *Income*: Middle and upper income residents show more interest in most iCONN offerings than do lower income residents. The one exception: lower income residents express greater interest in Spanish and bilingual magazines (most likely due to the greater representation of non-English speaking residents in the lower income group).

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

Marketing insight: When targeting communications at specific populations, the resources with greatest appeal among that group can be showcased.

Interest in Accessing Newspapers Via iCONN

When measuring interest in accessing specific newspapers via iCONN, three newspapers clearly top the list: *Hartford Courant, New York Times* and *Wall Street Journal.*

Interest in Specific Newspapers Online

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

Big Drop Off

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

There are significant differences by subgroup:

Note: all of these subgroups are among those who express at least some interest in iCONN.

- *Men*: express greater interest in the *Wall Street Journal* and the *Washington Post* than do women.
    - 62% of men are interested in using iCONN to access the *Wall Street Journal*, versus 38% for women.
    - 44% of men are interested in using iCONN to access the *Washington Post*, versus 22% for women.
    - Interestingly, women do not show significantly greater interest than men in any of the papers tested.

- *Upper Income*: Upper income respondents express greater interest in the *Wall Street Journal* than do lower income respondents.
    - 61% of residents with household incomes of $75,000+ are interested in using iCONN to access the *Wall Street Journal*, versus 39% for residents with household incomes of less than $40,000.

- *Lower income*: Lower income residents express greater interest in the *LA Times* and *Christian Science Monitor* than do upper income residents.
    - 29% of residents with household incomes of less than $40,000 are interested in using iCONN to access the *LA TImes*, versus 13% for residents with household incomes of $75,000+.
    - 28% of residents with household incomes of less than $40,000 are interested in using iCONN to access the *Christian Science Monitor*, versus 13% for residents with household incomes of $75,000+.

- *Younger/middle aged*: Residents aged 18 to 54 express greater interest in the *Hartford Courant* than do their older counterparts.
    - 74% of residents aged 18 to 54 are interested in using iCONN to access the *Hartford Courant*, versus 59% for residents aged 55+.

- *Older*: Residents aged 55+ express greater interest in the *Washington Post* than do residents aged 18 to 34.
    - 42% of residents aged 55+ are interested in using iCONN to access the *Washington Post*, versus 26% for residents aged 18 to 34.

Marketing insight: When targeting communications at specific populations, the newspapers with greatest appeal among that group can be showcased.

Interest in Accessing Magazines Via iCONN

When measuring interest in accessing various types of magazines via iCONN, there is majority interest in several magazines types and only niche interest in two:

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 *Time*	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

As with the newspapers, we found significant differences in magazine interest by subgroup:

Note: all of these subgroups are among those who express at least some interest in iCONN.

- *Men*: express greater interest in science/tech magazines and business/economic magazines than do women.
    - 73% of men are interested in using iCONN to access science and technology magazines, versus 40% for women.
    - 66% of men are interested in using iCONN to access business and economic magazines, versus 44% for women.

- *Women*: express greater interest in health magazines than do men.
    - 82% of women are interested in using iCONN to access health magazines, versus 69% for men.
        - Still a large majority for men!

- *Younger/middle aged*: Residents aged 18 to 54 express greater interest in business/economic magazines than do their older counterparts.
    - 57% of residents aged 18 to 54 are interested in using iCONN to access business and economic magazines, versus 42% for residents aged 55+.

- *Middle aged/older*: Residents aged 35+ express greater interest in *Consumer Reports* than do their younger counterparts.
    - 86% of residents aged 35+ are interested in using iCONN to access *Consumer Reports*, versus 62% for residents aged 18 – 34.

Marketing insight: As with the newspapers, for targeted outreach, showcase the magazine types that have greatest appeal to the particular audience.

Other Possible Offerings

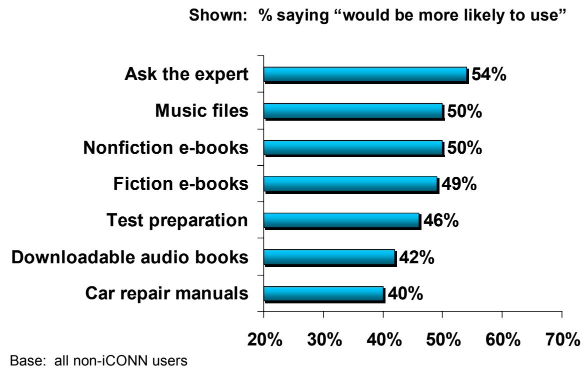
All survey respondents who had not yet used iCONN were asked if other possible iCONN offerings might make them more likely to use the service. Seven potential offerings were tested:

#1. "A live online 'ask the expert' service for research assistance or homework help"
#2. "Online test preparation services"
#3. "Online car repair manuals"
#4. "Nonfiction e-books … can be read online or downloaded"
#5. "Fiction e-books … can be read online or downloaded"
#6. "Downloadable audio e-books."
#7. "Access to music files … classical, jazz, blues, gospel and ethnic music."

These additional possibilities had relatively moderate appeal – no spectacular response, but no rejections either. Of the group, the 'ask the expert' service generated the most widespread interest.

Interest in Other Offerings

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



Marketing insight: Although response is not overwhelming for any of them, interest is certainly strong enough in all of them to warrant consideration for inclusion. All else held equal, the 'ask the expert' service is a good addition with which to start.

For these potential offerings, we found significant differences among subgroups.

- All of these potential offerings capture much more interest among younger and middle-aged residents than they do among older residents (55+)
- All show more interest among middle income residents ($40,000 to $75,000) than among the two income extremes
- Online car repair manuals show a male skew
- Households with children show more interest in several of these ideas than do households without children: online expert, test prep, e-books and music files

Shown: % saying "would be more likely to use iCONN" if this feature were included

	Ask the expert %	Test prep %	Car repair %	Nonfiction e-books %	Fiction e-books %	Audio e-books %	Music %
Household Income							
Under $40,000	55 (L)	45 (L)	36 (L)	44 (L)	49	48	46 (L)
$40,000 to < $75,000	65 (H)	56(H)	61(H)	62(H)	61(H)	43	60(H)
$75,000 +	57	48	40	50	46 (L)	45	53
Gender							
Male	55	48	54(H)	51	52	42	52
Female	52	43	28 (L)	50	46	42	49
Age							
18 to 34	72(H)	68(H)	62(H)	65(H)	69(H)	56(H)	63(H)
35 to 54	60	51	43	54	50	45	59
55+	29(L)	15(L)	11(L)	28(L)	26(L)	22(L)	27(L)
Have children							
Children at home	63(H)	60(H)	47(H)	60(H)	58(H)	50(H)	62(H)
No children at home	48(L)	37(L)	36(L)	44(L)	43(L)	37(L)	43(L)

Base: all non-iCONN users
When statistically significant differences exist, (H) denotes highest and (L) denotes lowest

Marketing insight: None of these potential offerings show extra appeal among the groups less predisposed to iCONN (lower income, older, childless, etc.). If the goal is to significantly penetrate these groups as well, new ideas will be needed.

Motivating More State Residents to Use iCONN

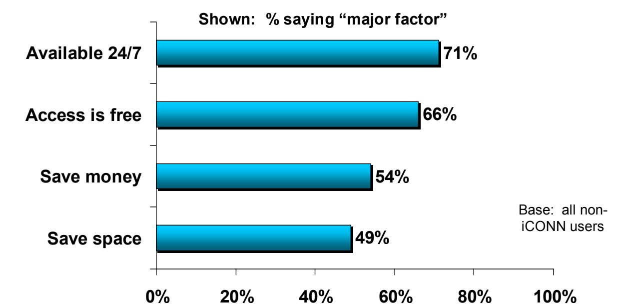
Four themes were tested to see how strong of a factor they might be in motivating iCONN usage among current nonusers. The themes were:

#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"

Of these, the two arguments with broadest appeal are the 24/7 availability and the free access. Roughly 7 in 10 nonusers of iCONN say these would be major factors in motivating them to use iCONN.

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?



These themes generally garner a stronger reaction among the demographic groups already more predisposed to iCONN in the first place – younger, better educated and middle/higher income.

Shown: % saying would be a "major factor" motivating them to use iCONN

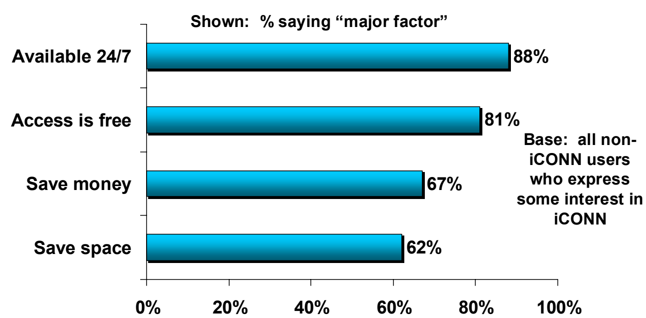
	Available 24/7 %	Access is free %	Save money %	Save space %
Household Income				
Under $40,000	61 (L)	55 (L)	58	43 (L)
$40,000 to < $75,000	85 (H)	78 (H)	63 (H)	64 (H)
$75,000 +	79	72	51 (L)	43 (L)
Education				
High school or less	61 (L)	54 (L)	44 (L)	45
Some college	87 (H)	78	71 (H)	58 (H)
College grad	79	79 (H)	55	43 (L)
Gender				
Male	74	71 (H)	56	45
Female	69	62	53	53
Age				
18 to 34	83 (H)	75	65 (H)	59 (H)
35 to 54	82	76 (H)	63	54
55+	45 (L)	46 (L)	34 (L)	37 (L)
Have children				
Children at home	83 (H)	72 (H)	62 (H)	53
No children at home	64 (L)	63 (L)	50 (L)	47

Base: all non-iCONN users
When statistically significant differences exist, (H) denotes highest and (L) denotes lowest

If we isolate only respondents who express some degree of interest in iCONN, we see stronger reactions to these themes. However, the rank order remains the same.

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?



V. Conclusions and Recommendations

Significant Room for Growth – Positive Outlook

This research suggests that there is significant room for growth for iCONN. Right now, only 5% of state residents report using the service. And, only 14% have even heard of it – and most of them have only simply heard of it, they have no real familiarity. Hence, awareness and usage are fairly low.

However, 22% of residents who have not yet used iCONN express strong interest in it (say they are "very likely" to use it after being read a description). An additional 35% say they are "somewhat likely" to use it.

There is often a level of exaggeration in survey responses to new services and products. With that in mind, we can limit the estimation to the 22% who say they are "very likely" to use it. Even with this conservative approach, projected interest is at 570,000.

A communications campaign is warranted. Public interest in there, it simply needs to be tapped.

Expect Differences in Interest – By Subgroup

Interest in iCONN is not evenly spread throughout the state's population. This research shows that some demographic groups express much greater interest in iCONN than do others.

Most Interested in iCONN	*Least Interested in iCONN*
- Residents who do online research often	- No children at home
- Middle income residents	- High school education or less
- Residents with children at home	- Non-library users
- Library users	- Non-library cardholders
- College educated residents	- Lower income

There is some interest in iCONN among all groups. However, it is reasonable to expect a much stronger reaction to a communications campaign from the groups listed above in the left hand column than in the right hand column.

- To get the greatest results from a marketing campaign, it would be best to direct it towards the more interested subgroups.

Repeat Usage Seems Assured

Based on the very positive response from iCONN users in the survey, we would expect a high degree of repeat usage and positive word of mouth for iCONN. Right now, users are so few in number that the effect is not very large. But, once the base of users begins to grow, repeat usage and positive word of mouth should help expand the base of users greatly.

- Once you hook them, they're happy. The key is too get them in the first place.

Potential New Offerings
All of the potential iCONN offerings show significant interest – over 40%. Hence, including any of them as a standard feature of the service would be worthwhile. Of all of them, the one with the greatest appeal is the "ask the expert" offering.

- All of these potential offerings show more interest among groups always skewed toward iCONN interest. In other words, they help solidify support among those already leaning toward interest. What they do NOT do is capture a large amount of interest among groups that are less interested in iCONN in the first place (lower income, no children at home, nonusers of the library, etc.).
    - If penetrating these groups is a priority, brainstorming other specific offerings is needed.

How To Market iCONN
This research offers several insights regarding marketing iCONN:

Insight #1: Emphasize the most attractive offerings in communications campaigns aimed at a statewide general audience. This will help garner the most widespread appeal.

- The iCONN offerings with broadest appeal are:
    - Online newspapers – especially the *Hartford Courant, New York Times* and *Wall Street Journal*
    - Online magazines – all of the magazines tested in the study have broad appeal, with the exception of law and literature magazines
    - Health and wellness resource center
    - History resource center
    - Library catalog

Insight #2: For communications to targeted audiences, this research helps identify the offerings that have special appeal to various subgroups

Special appeal among men	Special appeal among women
• History center • Business center • *Wall Street Journal* • *Washington Post* • Science and tech mags • Business mags	• Health and wellness center • Health magazines

Special appeal among households with children
- Online library catalog
- AP photos

Special appeal among lower income households • Bilingual mags • *LA Times* • *Christian Science Monitor*	Special appeal among upper income households • *Wall Street Journal*
Special appeal among younger/middle aged • *Hartford Courant*	Special appeal among middle/older aged • *Consumer Reports*

Insight #3: Build iCONN marketing and communications campaigns around themes that resonate with potential users

- ***Available 24/7*** – the ultimate in convenience
    - Always there when you need it
    - At home, at work, anywhere

- ***Free*** – no charges, no fees
    - Tons of information, at no cost

- ***Fast*** – information at the speed of light

- ***Trustworthy*** – sources and information on iCONN are "librarian approved"
    - This is important, because as we saw just about everyone trusts librarians, but far fewer trust information available over the internet

- ***Diverse offerings*** – with so many different offerings, there's something for everyone on iCONN

- ***Multiple sources*** – with iCONN, you can tap into multiple sources, to get different views and perspectives