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

Fall 2007

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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. The 2007 survey closely replicates the survey conducted by CSRA in 2005 for the State Library, and was designed to allow for comparative analysis. Notable changes in the findings since 2005 are highlighted in this report.

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?
- Assess any marketing strategies used since 2005

Methodology

CSRA conducted 500 telephone interviews with Connecticut residents (ages 18+ years) in October and November, 2007. An RDD (Random Digit Dial) methodology was used to ensure the results are representative. The sample was stratified to include:

- 200 interviews among CT public library users – defined as residents aged 18+ who visit a Connecticut public library at least a few times per year

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 ±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

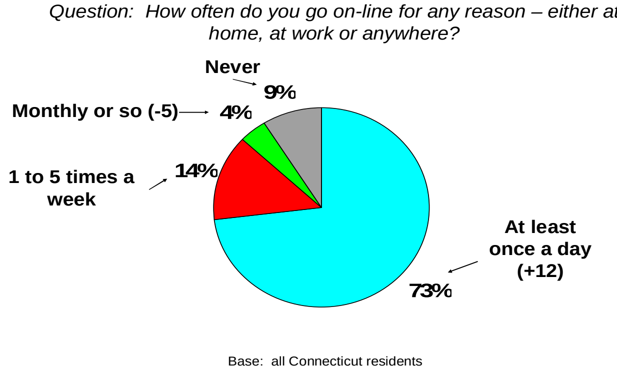
More Connecticut residents across all demographic groups are regularly using the Internet. Research and gathering information continues to top the list of online activities.

The survey explored who uses the Internet in the state, how often the Internet is accessed, and what types of information and research is conducted online, if any.

Internet Usage - General

A vast majority of Connecticut residents (91%) use the Internet. Seventy-three percent use it daily, an increase of 12 percentage points from 2005.

Internet Usage in Connecticut



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

Younger adults, better educated, higher income, and those with children at home are more likely to go online for any reason. It is interesting to note, that weekly online usage has increased across most demographic groups.

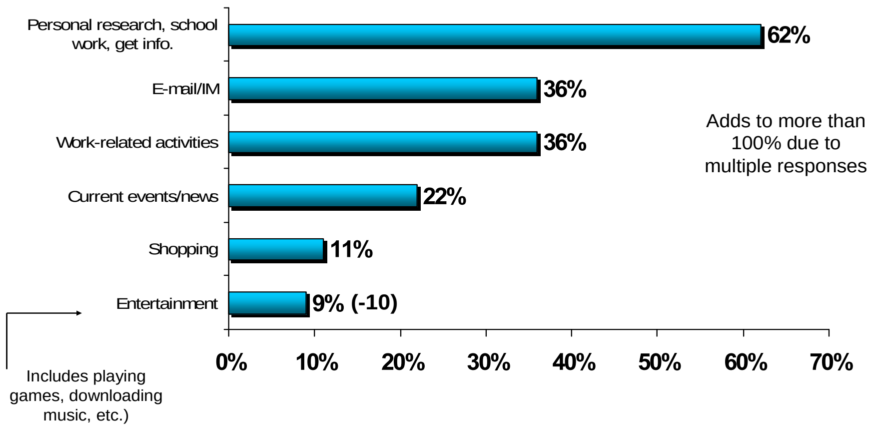
Base: total sample	**Online at least once a week (for any reason)**	
Age	2007	2005
18 – 34	(H) 97%	(H) 88%
35 – 54	93%	81%
55+	(L) 76%	(L) 61%
Household Income		
Under $40,000	(L) 63%	(L) 58%
$40,000 to less than $75,000	85%	83%
$75,000 +	(H) 97%	(H) 91%
Educational Attainment		
High school or less	(L) 75%	(L) 64%
Some college	86%	90%
College graduate	(H) 93%	(H) 93%
Children (under 18) at home		
Have children at home	(H)96%	(H) 89%
No children at home	(L) 83%	(L) 70%

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

Primary online activities vary between respondents. Of those residents who go online, 62% report using the Internet primarily for their own coursework, for children's schoolwork, or for personal research (e.g., to find out information about autos, hobbies, restaurants, and travel). More than a third of residents (36%) indicate that they go online primarily for email/instant messaging or for work-related activities. These findings are consistent with those from 2005, except in the area of entertainment (includes playing games, downloading music, etc.) Only 9% of residents cited entertainment as their primary online activity compared to 19% in 2005.

What's Being Done On-line

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



Base: CT residents who go online at all (91% of total)

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

Using the Internet to Obtain Information/Do Research

Nine in ten residents report using a computer to obtain information on-line. Similar to 2005, the following subgroups report a higher usage of the computer for research and information gathering than do others.

- Better educated residents (at least some college) - 95%
- Households with more income ($75,000+) - 99%
- Younger residents (aged 18 to 34) - 99%

Subgroups that report lower usage of the computer for online research are:

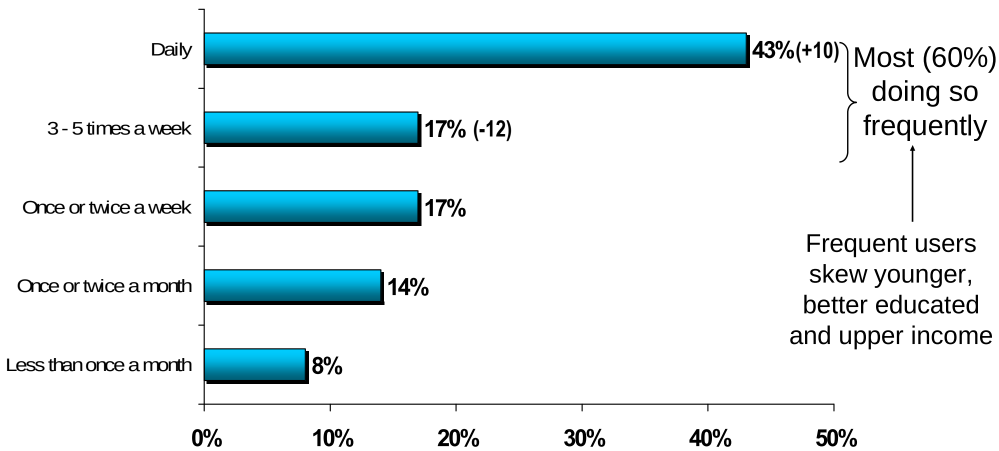
- Households with less income (<$40,000) - 68%
- Older residents (aged 55+) - 76%
- Less educated residents (high school graduate or less) - 85%

However, even among the groups where online research is less prevalent, we still find over half conducting research online. These groups also showed significantly more usage since 2005.

Computer usage for research and gathering information has increased in the past two years. More than four in ten residents who use the Internet for these purposes report going online daily (43% in 2007 compared to 33% in 2005). Sixty percent 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 (90% of total)

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

When asked from what location they primarily go online to conduct research and get information, residents says they do so from home. Seventy percent go online from home to access information (an increase of 8% from 2005); while 24% do so from work. Only 3% do so primarily from the library.

> *Marketing insight*: Most residents have interest in conducting research and obtaining information online, especially younger, better educated, and higher income residents. With further exposure, iCONN will be tapping into a population that is familiar with and interested in obtaining information online.

Typically, most residents use popular search engines such as Google or Yahoo when conducting research and getting information online.

Connecticut residents who search for information online are doing research in a wide variety of areas; no area of research dominates.

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

Slightly more people are using online resources for health and financial/business research.

Residents continue to use the Internet for research because they find it fast and convenient, and it offers a variety of sources.

Theme 1: Fast (74% said this, up 13% from 2005)

- A majority of respondents say this is the best thing about online research. Respondents feel doing research online saves them a great deal of time. Any information they are searching for is quickly at their fingertips.

Theme 2: Convenient (42% said this)

- On-line research is also convenient. Respondents can access information from home, work or school, 24 hours a day, 7 days a week.

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

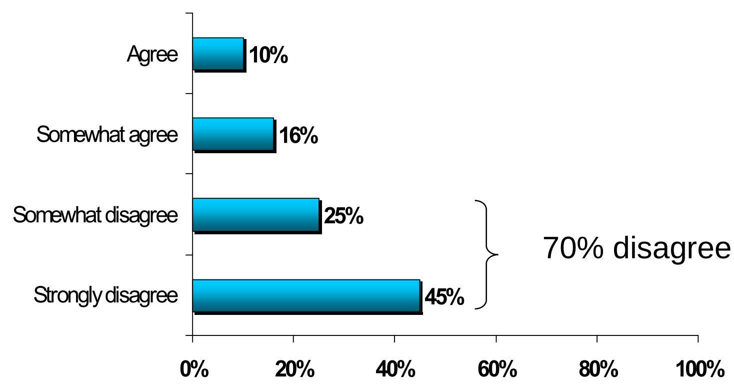
- About 1 in 4 said the variety of sources was a key aspect of on-line research – they are able to access different resources with many different viewpoints.

> Marketing insight: When marketing iCONN, these themes should be prevalent in the marketing materials as they are the most valued aspects of research to Connecticut residents.

Most online researchers feel comfortable finding information they need online. Seventy percent say they currently have no difficulty finding information online.

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 (90% of total)

> Marketing insight: Since most residents feel comfortable conducting online research, it may be more challenging to get people to use a new research engine. Continued marketing efforts about iCONN will need to emphasize its advantages over other research engines.

Although, most people feel they have little difficulty finding information online, significantly fewer older residents (aged 55+) indicate they have little difficulty finding information online. Fifty-nine percent of older residents disagree that they have difficulty finding information online compared to 75% of residents aged 18 to 34, and 73% of residents aged 35 to 54. Close to one in every three older residents express some difficulty finding information online.

It is interesting to note that the percentage of older residents (55+ years) who voice some difficulty accessing information on the Internet is on the decline (59% in 2007 compared to 68% in 2005), suggesting that this age group is becoming more familiar and comfortable with computer usage.

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

	18 to 34	**35 to 54**	**55+**
Agree	24%	25%	31%
Disagree	75%	73%	59%

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

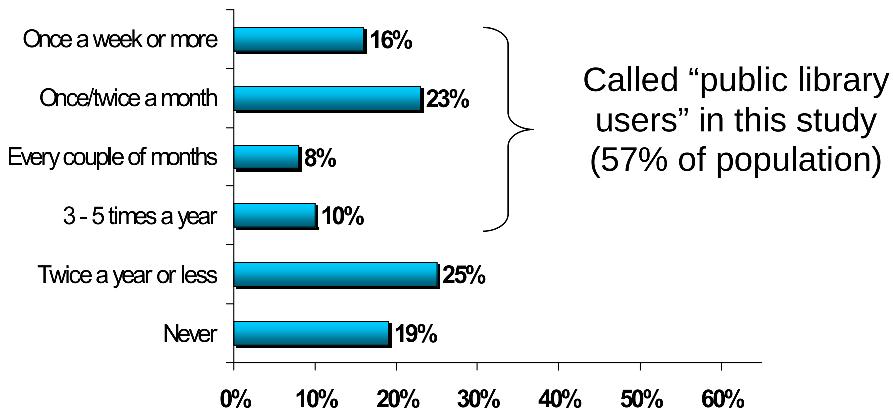
II. Awareness and Usage of Library Services

Public Library Visitation

Fifty-seven percent of state adult residents visit a public library three or more times a year. For this study, we called this group “public library users”. The results of the survey were analyzed by this group. In addition, 25% of residents are infrequent users, visiting a public library twice a year or less. Finally, almost 1 in 5 residents (19%) never visit a public library.

Public Library Visitation

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



Base: all Connecticut residents

Residents with at least some college education show significantly higher usage of public libraries than those with a high school education or less.

	High school or less	Some college	College grad
Use public library once a month or more	27%	49%	45%

Only Fairfield County shows significantly more library usage than Hartford County, all other counties are notably higher than Hartford County as well.

	Fairfield County	Hartford County	New Haven County	Other Counties
Use public library once a month or more	46%	$\boxed{33\%}$	42%	37%

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

Connecticut residents are more familiar with and use interlibrary loan more than any other library service. reQuest and iCONN are the least identified and used. Library users are more likely to be familiar with and use library services than the general public.

	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" refers to the total sample, which includes both library users and nonusers.
* Asked after being read a description of the program

The general public and library users report increased familiarity with and usage of all library programs since 2005. Interlibrary loan services are being used by more residents. With the general public's increased use of online resources, it is not surprising that both the general public and library users are accessing the public library's website more frequently (+ 9 and +12 percentage points since 2005, respectively). There is also an upward trend in use of the Connecticard program. Some of these gains are small, so the State Library should continue its advertising and distribution of promotional materials about programs that are available to all state residents.

iCONN Awareness and Usage

Consistent with 2005 findings, only a small proportion of state residents (14%) have heard of iCONN (also known as Connecticut's RE-search engine), and even fewer (7%) have ever used it. Forty percent of those who have used it do so at least once a month.

	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%

Note: "general public" refers to the total sample, which includes both library users and nonusers.
* Asked after being read a description of the program

There are not any large differences in awareness by subgroup – with two moderate exceptions:

- More educated people show the most familiarity with iCONN. College graduates (19%) are more likely to have heard of iCONN than those with some college (9%) or a high school education or less (13%).

- 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 - 34 year olds, versus only 11% for 35 - 54 year olds, and 13% among those aged 55+).

There are four general ways that people have heard about iCONN; the first three ways are more prevalent.

1. *Via the library* (35%) (slight increase from 30% in 2005)
   - Directly from librarians (28%) or via materials available at the library (7%)

2. *Via schools* (25%)
   - From college or school they attend or have recently attended (24%) or from child's school (1%)

3. *Via word of mouth* (26%)
   - From coworkers (17%) and friends, family and neighbors (9%)

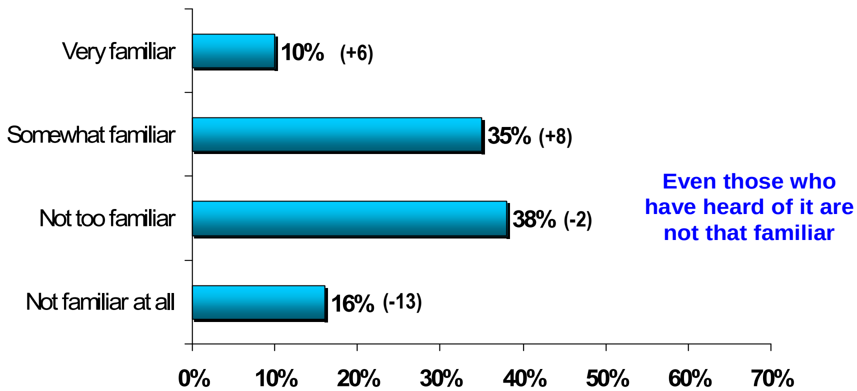
4. *Via the Internet* (9%)
   - First learned of it via the iCONN site itself (1%) or via other websites which directed them to iCONN (8%).

Marketing insight: Continued promotions for iCONN are necessary to raise awareness. Promotions within libraries have proven somewhat effective in increasing awareness of iCONN by library visitors. In addition, school campaigns also have potential to increase awareness. A focus on the advantages of using iCONN may help to increase usage.

While only a small percentage of people have heard of iCONN, even less are familiar with it. Most of the residents who have heard of iCONN are not familiar with it. About half (45%) of the 14% (about 6% of the total population) report any real familiarity with it (these are essentially the users). The other half of those who have heard of it say that they have only simply heard of it; they are not that familiar 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)
Note: Numbers in parentheses indicate the change from 2005.

View of Librarians versus Internet

Connecticut residents continue to view librarians positively; an attitude which is consistent across subgroups. A vast majority, 94%, agree that librarians "provide accurate and reliable information." When the same is asked about the Internet, residents are more cautious about trusting the reliability of information they receive on the Internet.

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

Even those who go online often for research do not see the Internet as a terribly reliable source. Among this group, only 36% strongly agree and 50% somewhat agree that "the Internet provides accurate and reliable information."

Marketing insight: The general public's positive view of librarians can be used to market iCONN. Not only can people search for the information they need using iCONN, but since iCONN is part of the state library system, they can feel confident that the information they find is reliable and trustworthy.

Concern About Equal Access to Information

Connecticut residents are concerned about the issue of all residents in the state having equal access to information. Ninety-one percent 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*." (74% *strongly* agree).

III. Feedback from iCONN Users

Note: Due to the very low incidence of iCONN usage, we encountered only 35 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

The feedback from users is positive which is good for iCONN.

- Eighty-eight percent of iCONN users rate their experience with iCONN as "excellent" (33%) or "good" (55%). Only 11% say "fair" and no one rates their experience as "poor".
- Ninety-six percent of users say they are, all in all, satisfied with "the information found on iCONN." Seventy-six percent of users agree that they were able to find information quickly and easily. Only 6% somewhat disagree with the statement and 17% don't know.
- Ninety percent would recommend it to others who need information.

Marketing insight: While the usage is low, high user satisfaction levels usually result in return users and a growth of new users through word of mouth. However, the base of users is too small for word of mouth to have a large impact on usage.

Uses of iCONN

When asked about what iCONN resources are used, users of iCONN equally identified different aspects of iCONN. General information (33%), the library catalog (29%), and online newspapers (24%) are the most used resources. Specific iCONN resources mentioned are:

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

Purposes for using iCONN varied; however, school or course work (67%) is mentioned the most.

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

Demographic Profile of iCONN Users

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

- They have higher incomes
- They are female
- They are better educated
- They use the library at least once a month

Although the sample is small, it is interesting to note a slight increase since 2005 in iCONN users among residents with lower household income.

	iCONN Users	General Public
Household Income		
Under $40,000	20%	18%
$40,000 to less than $75,000	24%	26%
$75,000 +	57%	55%
Gender		
Male	40%	38%
Female	60%	62%
Educational Attainment		
High school or less	9%	20%
Some college	11%	23%
College graduate	➢80%≺	55%
Library User		
Use the library at least once a month	➢66%≺	39%

➢ ≺ denotes notably higher among iCONN users

IV. Interest among Current Non-Users

Due to the fact that iCONN usage is small, gauging interest in iCONN among current non-users is critical. This is especially true since usage growth is dependent on those unaware of and not currently using iCONN.

Interest in iCONN - General

For non-users, a description of iCONN was read to introduce it.

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, one in four (25%) state residents who had never used iCONN before said they would be "very likely" to use iCONN in the future (31% among library users). Another 36% said they would be "somewhat likely" to use iCONN in the future (37% among library users). These findings are consistent with those in 2005.

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

Marketing insight: Drawing a conservative estimate from those who say they are very likely to use iCONN in the future, about 675,000 of the 2.7 million adults in Connecticut may potentially use iCONN. This means that there is a large potential market for iCONN.

The key demographics driving interest of future iCONN usage are: history of doing online research, younger, upper income, higher education, having children at home and being a library user already. Respondents with these characteristics reflect a stronger interest in iCONN.

<u>Strongest</u> Interest in iCONN - Subgroups (above average interest)

Based on description read

<u>% saying "VERY likely to use"</u>

- **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)**

<u>Least</u> Interest in iCONN - Subgroups (below average interest)

Based on description read

<u>% saying "VERY likely to use"</u>

- **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**

<u>Marketing insight</u>: Growth of iCONN usage will be most successful in the short term among the key demographics who are more likely to use iCONN than the general public average. Targeting these groups in the short term will also be more cost efficient.

Interest in Specific iCONN Offerings

After gauging interest in iCONN overall, interest in the specific iCONN offerings among respondents who express *at least some degree* of interest in iCONN (about 63% of the total sample) was explored.

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

Online access to….	Very interested		Very/Somewhat interested
Health and wellness center	41%		83%
Newspapers and magazines	41%	Top	81%
Science resource center	40%	tier	77%
History resource center	37%		78%
Library catalog	33%	Middle	72%
Genealogy resources	31%	tier	65%
Business and company resource center	29%		66%
Associated Press photographs	21%	Bottom	64%
Scholarly journals	18%	tier	52%
Spanish language and bilingual mags	8%		18%

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, Science Center, and Associated Press photographs than do women. There is still strong interest among women, however.

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

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

- *Those with children*: express greater interest in the science resources center, online catalog and genealogy resources than do households without children, perhaps for school projects. Although, households without children still show strong interest.

Very/Somewhat interested in…	With children under 18	No children
Science resource center	85%	72%
Online catalog	80%	67%
Genealogy resources	77%	58%

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 especially the history resource center and science resource center. The two exceptions: 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) and genealogy resources.

Very/Somewhat interested in…	Lower income (< $40k)	Middle income ($40k to <$75)	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

Marketing insight: Similar to 2005 findings, the resources listed above with the greatest appeal should be used when targeting specific populations.

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.*

	Would use iCONN to access…
Hartford Courant	69%
New York Times	63%
Wall Street Journal	50%
Boston Globe	38%
Washington Post	33%
LA Times	20%
Christian Science Monitor	12%

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.

- *Lower income*: Lower income (<$75,000) residents express greater interest in the following newspapers than do upper income residents.
  - *Hartford* Courant (79% versus 64%)

- *Younger/middle aged*: Residents aged 18 to 54 express greater interest in the following than do their older counterparts.
  - *Hartford* Courant (74% versus 58%)
  - *New York Times* (68% versus 53%)

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 using iCONN, there is major interest in several magazines types:

	Would use iCONN to access…
Consumer Reports	80%
Health magazines	71%
News magazines, such as *Time*	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

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 the following magazines than do women.
    - Business and economic magazines (55% versus 36%)

- *Women*: express greater interest in the following magazines than do men.
    - Health magazines (80% versus 61%)
    - News magazines (78% versus 61%)
    - Popular magazines (73% versus 61%)
    - Literature magazines (40% versus 28%)

- *Younger/middle aged*: Residents aged 18 to 54 express greater interest in the following magazines than do their older counterparts.
    - News magazines (74% versus 61%)
    - Popular magazines (73% versus 50%)
    - Science magazines (58% versus 46%)
    - Law magazines (27% versus 17%)

- *Those with children*: express greater interest in the following magazines than those that do not have children.
    - Popular magazines (79% versus 59%)

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:

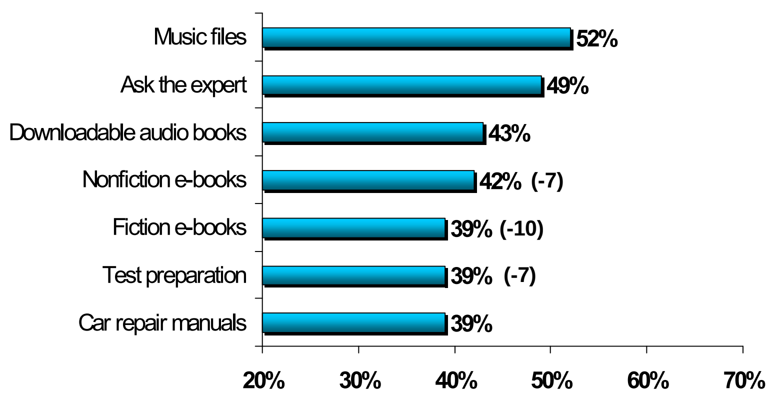
1. *"A live online 'ask the expert' service for research assistance or homework help"*
2. *"Online test preparation services"*
3. *"Online car repair manuals"*
4. *"Nonfiction e-books … can be read online or downloaded"*
5. *"Fiction e-books … can be read online or downloaded"*
6. *"Downloadable audio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

These additional possibilities had relatively moderate appeal. Of the group, the music files and "ask the expert" service generated the most widespread interest. Fiction and nonfiction e-books, as well as test preparation, showed a significant decrease from 2005.

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

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

<u>Marketing insight</u>: While not a large interest, these potential offerings showed interested and should be considered for inclusion. Music files and "ask the expert," above all, should be considered the most, as they have maintained higher level among the potential offers since 2005.

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+)
- Online car repair manuals show a male skew
- All of these potential offerings capture much more interest among households with children than do households without children

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
Gender							
Male	48%	37%	(H)49%	37%	36%	46%	52%
Female	49%	41%	(L)31%	46%	42%	40%	51%
Age							
18 to 34	(H)62%	(H)69%	(H)64%	(H)48%	(H)51%	(H)54%	(H)71%
35 to 54	53%	47%	40%	47%	45%	48%	56%
55+	(L)32%	(L)11%	(L)21%	(L)32%	(L)22%	(L)30%	(L)36%
Have children							
Children at home	(H)63%	(H)62%	(H)47%	(H)50%	(H)48%	(H)54%	(H)65%
No children at home	(L)40%	(L)26%	(L)34%	(L)38%	(L)34%	(L)36%	(L)44%

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 interested in iCONN (older, household without children, etc.). Further investigation and new ideas will be needed to penetration these groups.

Motivating More State Residents to Use iCONN

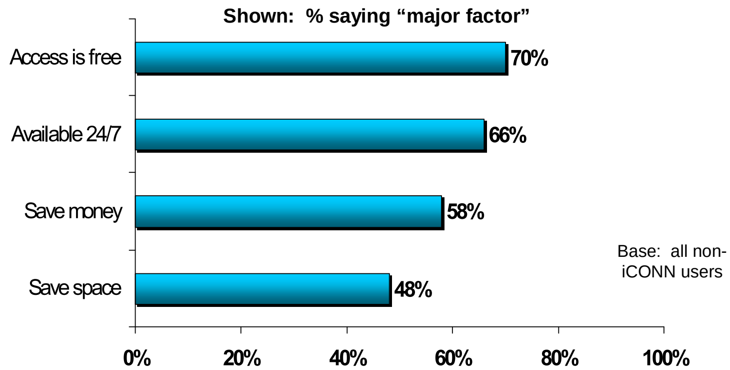
Four themes were tested to see how strong of a factor they might be in motivating iCONN usage among current nonusers. The themes were:

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?



A stronger reaction of these themes generally comes from those groups that have interest in iCONN (younger, better educated and middle/higher income).

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

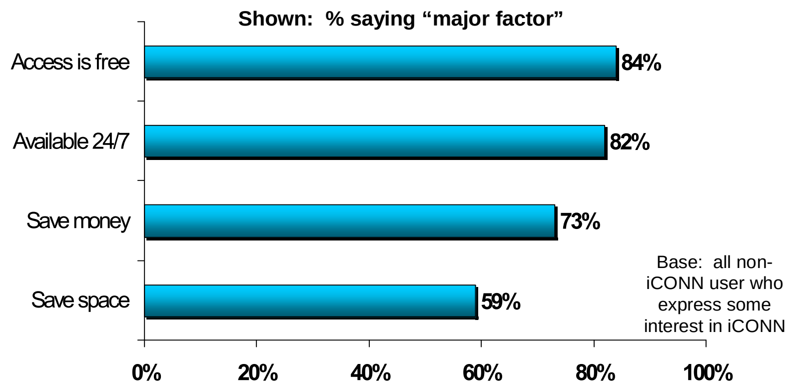
	Available 24/7	Access is free	Save money	Save space
Household Income				
Under $40,000	65%	(L)61%	62%	54%
$40,000 to < $75,000	69%	70%	58%	50%
$75,000 +	75%	(H)79%	64%	53%
Education				
High school or less	(L)56%	(L)60%	(L)49%	(L)42%
Some college	69%	74%	(H)66%	(H)57%
College grad	(H)77%	(H)80%	64%	50%
Gender				
Male	62%	(H)75%	58%	(L)41%
Female	69%	(L)64%	58%	(H)55%
Age				
18 to 34	(H)82%	(H)80%	(H)81%	(H)63%
35 to 54	77%	77%	61%	54%
55+	(L)44%	(L)55%	(L)39%	(L)33%
Have children				
Children at home	(H)81%	(H)83%	(H)72%	(H)61%
No children at home	(L)58%	(L)63%	(L)50%	(L)41%

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

When isolating respondents who express some degree of interest in iCONN, stronger reactions to these themes are seen. However, the order in which respondents rank each item 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

There is significant room for growth for iCONN. Right now, only 7% of state residents report using the service (a slight increase from 5% in 2005). Only 14% have heard of it with most having little familiarity, although those who say they are very or somewhat familiar with iCONN increased from 31% in 2005 to 45% in 2007. There is, however, strong interest in iCONN. Twenty-five percent of residents (a slight increase from 22% in 2005) 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 estimated 675,000 people in the state. An additional 36% say they are "somewhat likely" to use it.

Expect differences in interest among Connecticut residents, especially within different demographic groups.

Most Interested in iCONN	*Least Interested in iCONN*
- Residents who do online research often - Library users - Residents with at least some college - Library card holders - Higher income residents	- Lower income - High school education or less - Non-library users - Non-library card holders

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 and to the left.

Further promotional campaigns are needed to raise iCONN awareness among residents. To get the best short term results, campaigns should be focused among those groups with more interest

Repeat Usage Seems Assured

Based on the very positive response from iCONN users in the survey, a high degree of repeat usage and positive word of mouth for iCONN is expected. However, since there are so few users the effects of iCONN satisfaction are not very large. Once the base of users grows, repeat usage and positive word of mouth should help expand the base of users greatly. The system is set up well for return usage; the primary focus needs to be expanding awareness to increase usage.

Potential New Offerings

All of the potential iCONN offerings show significant interest – about 40% or higher. Including any of them as a standard feature of the service would be worthwhile. Of all of them, the two with the greatest appeal are the music files and ask the expert offering.

- All of these potential offerings show more interest among groups always skewed toward iCONN interest. This means that support among those already interested grows. However, to increase interest in those who are not very interested in iCONN, new ideas must be presented.

How to Market iCONN

The results show different insights into how to market iCONN.

Insight #1: In order to break residents from their usual research sites, emphasize what make iCONN unique compared to standard search engines as well as communicate the most attractive offerings aimed at a statewide general audience.

- 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
    - Newspapers and magazines
    - Science resource center
    - History resource center

Insight #2: For communications to targeted audiences, focus on the aspects of iCONN that have the most appeal for a particular group.

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

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

Insight #3: Communicate the benefits of using iCONN that residents like the most about online research especially the fact that iCONN is part of the state library system so sources on iCONN are reliable and trustworthy.

- ***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"
    - Less people trust information they get from random sources on 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