AT A TIPPING POINT

Education, Learning and Libraries

A REPORT TO THE OCLC MEMBERSHIP

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At a Tipping Point:

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Education, Learning and Libraries

A REPORT TO THE OCLC MEMBERSHIP

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AT A TIPPING POINT

We are quickly approaching the tipping point into a new future for American education.

This transformation follows tipping points that have already occurred in how most of us consume and evaluate information, how we shop and buy, how we date and break up, and how we manage our careers and our retirement portfolios. Web and mobile services have forever changed how we manage our days, our jobs, and very soon, how we learn and manage our education.

We now spend nearly as much time exploring online, watching videos on our mobile phones, texting and tweeting each day as we do sleeping. So every day, keystroke by keystroke, click by click, we become more skilled, more confident and more empowered.

It should not come as a surprise then that the skills and talents that we have already unleashed on so many aspects of our lives would come to guide how we learn and educate ourselves. It is simply 'what's next' in our digital evolution.

Yet, as is often the case in times of change, many of the primary purveyors of the traditional services that are being reshaped, or more likely unseated, don't see the shift coming. Perhaps we are too close for proper viewing or too comforted by loyal customers and high customer service ratings; we don't feel the tip or sense shifts in the landscape. We misread the cues.

This impending education tipping point is not the result of any single event or set of new services. It is not the result of the recent appearance of one online education model, MOOCs. It is not the result of an outcry of parents, looking for alternatives to what many are calling "unfundable college educations." Nor is it because of the rise of easy-to-use self-help videos and tutorials. Education will tip into a new future because of the cumulative weight of all of these factors—**new consumer practice, evolving technological capabilities and increasing economic incentives**.

As social scientist Malcolm Gladwell tells us, "A tipping point is that magic moment when an idea, trend or social behavior crosses a threshold, tips and spreads like wildfire."

The sparks are visible.

So, what is it that we are tipping toward? We are tipping from the age of students as directed learners to an era of students as empowered education consumers and eager education evaluators. We are tipping toward an educational era of choice over tradition, convenience over perfection, self-service over predefined options. Ratings, recommendations, just-in-time delivery—every facet of digital life—will come to bear on education. We will change how we learn, where we learn and who guides our path. Just as we have trip advisors, we will have online education advisors, e-books and e-courses, self-service and self-paced, on-campus and on-demand. We will have options.

And we will need libraries—prepared to support the needs and aspirations of online learners.

The same digital forces reshaping education will reshape libraries, on our campuses and across our communities. But even if libraries are ready, will education consumers seek out libraries? Will libraries miss the cues? The brand perception of libraries remains firmly planted in tradition. Libraries = books.

This latest OCLC research study aims to provide librarians with important information about the trends and triggers that are driving to this tipping point. We will share data on consumers' attitudes about higher education and about their use, perceptions and future expectations of online learning and MOOCs. We will share data about parents' and students' perceptions of campus life and campus libraries, and what they know and like about online learning. And we will share what they told us about the library's role in online learning.

The strategy question that I hear most when I speak with library leaders is, "Are we acting quickly enough, and boldly enough, to do what it takes to remain relevant?"

What are the most effective strategies to gain—and to communicate—the relevance of libraries with the tip to a new era of education? We conclude this report with some thoughts for strategic consideration and for immediate action. We lean on the work of David Allen Aaker, an expert who has spent a career studying how successful organizations build, sustain and communicate brand relevance in a changing world.

We benefited from the talents and expertise of two extraordinary library leaders to prepare this study. Special thanks to colleagues Lorraine Haricombe, Dean of Libraries at the University of Kansas, and Deb Wallace, Executive Director of Knowledge & Library Services at the Baker Library, Harvard Business School, for their insights, guidance and support in this research.

As always, the aim of this report to the OCLC membership is to share data about the trends that will shape our collective future. A new future is coming to education—and libraries. The sparks are visible. It's time to act.

Cathy De Rosa
Vice President for the Americas and
Global Vice President of Marketing
OCLC

INTRODUCTION

We are a nation of confident, empowered online information consumers who are always 'on.' Soon we will be a nation of confident, empowered online education consumers.

A few years ago, we would have been comfortable making such predictions for the younger segment of the U.S. population, the early social media adopters, the digital natives. But that qualifier is no longer needed. Affordable smartphones, free Wi-Fi hotspots, texting and YouTube have leveled the playing field and the learning field. Across all age groups, income levels and education levels, we are an online nation—ready and eager to embrace online education.

The OCLC Market Research team has been studying the 'information consumer,' a term we first used in 2003, for over a decade. We have tracked information consumers' behaviors, perceptions and attitudes—how they feel about and use online information, search engines, Amazon, Google, libraries and library websites.

R U online?

Always... unless I'm sleeping

I know right?

Love my new smartphone. My lifeline!

Jealous! Can't afford a new one

Just saw u can get one free online

Probably a scam

Doubt it - saw it on 3 or 4 sites

Hmm...did u get your tablet replaced?

No. Not happy! Did u see my tweet?

Yeah. Could tell u r not happy! :(

No $ for new one! I need a promotion or a new career

Go back to school!!!

College is soooo $$$$$

Do it online. Should be cheaper

True. I'd wanna be on campus, too. Hang out, meet people, check out the library

The library? Really???

Sure! I've always loved the library. Went all the time when I was little

Back when we had time to read a book, huh?

LOL. So, I should try online classes?

Definitely! Loved the online class I took! Gotta go. TTYL

OCLC

Since the launch of the social Web, we have tracked how online users view privacy and security and how they view and use their social networks. Information consumers have shared what they like and believe, and what they expect to use more in the future.

We have seen some significant changes (e.g., who is spending time online), and we have seen some things not change much at all (e.g., perceptions of libraries).

In 2005, when we published the first *Perceptions of Libraries and Information Resources*, about 70% of Americans were online. Today, that rate has grown to 87%, including more than half of those over the age of 65 (Pew, January 2014c).

In that same time period, cell phone ownership rose from about 70% in 2005 to 90% in 2014, and more than half (58%) now own a smartphone (Pew, January 2014b).

In 2007, when we published *Sharing, Privacy and Trust in our Networked World*, 71% of those under 25 were already using social networking sites, most logging on daily to their favorite site. But only 13% of those age 60+ were engaged in social networking activities.

Today, 94% of those under 25 use social networking sites; so do 60% of the 60+ age group, with 32% visiting Facebook daily.

"[I'm] becoming familiar with the computer, *the art of conversation online* as opposed to in person."

MOTHER OF A HIGH SCHOOL STUDENT, AGE 52

SOCIAL NETWORKING BY AGE

2007 2014

	AGE 24 OR YOUNGER	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
2014	94%	90%	79%	70%	60%
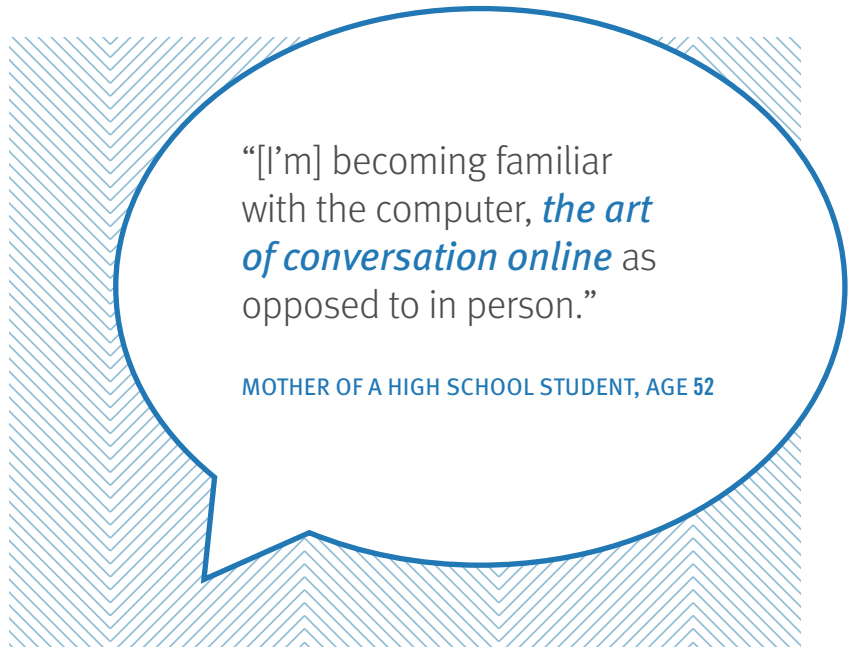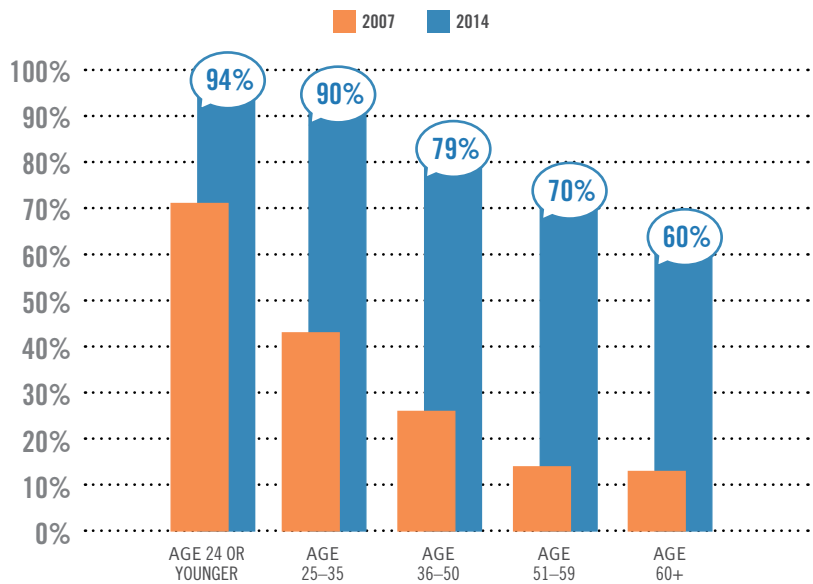
The gap is also closing across income and education levels.

In 2007, those with household incomes of less than $25,000 had higher social networking participation rates than other income levels. That trend continues in 2014, but the gap in participation rates between income levels has gotten smaller.

In 2007, education level said a lot about who was on social networking sites—much less so today. High school students in 2007 were by far the segment who were most likely to use social networking sites. Today, high school student use exceeds 90%. Roughly three quarters of adults with or without any post-high school education are now participating in online social networks.

Equipped with mobile and tablet technology and thousands of social sites, all ages, income and education levels are now connected and active participants on the social Web. They are prepared and eager to embrace more online services and lifestyle changes.

Online education is next.

SOCIAL NETWORKING BY INCOME

■ 2007 ■ 2014

- LESS THAN $25,000: **82%**
- $25,000–$49,999: **81%**
- $50,000–$99,999: **76%**
- $100,000+: **72%**
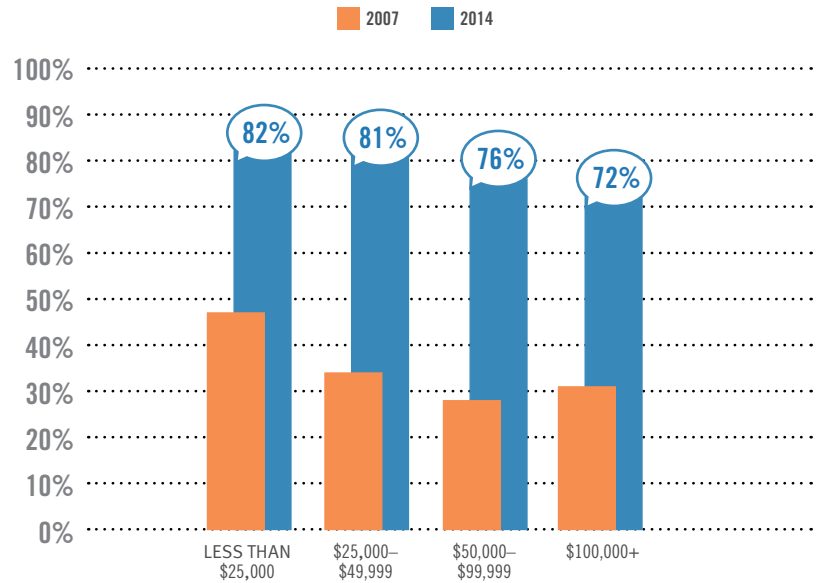
SOCIAL NETWORKING BY EDUCATION

■ 2007 ■ 2014

- CURRENT HIGH SCHOOL STUDENT: **93%**
- HIGH SCHOOL DEGREE OR LESS: **78%**
- SOME COLLEGE OR TRAINING AFTER HIGH SCHOOL: **77%**
- ASSOCIATE'S DEGREE: **76%**
- BACHELOR'S DEGREE: **75%**
- SOME GRADUATE WORK OR DEGREE: **70%**
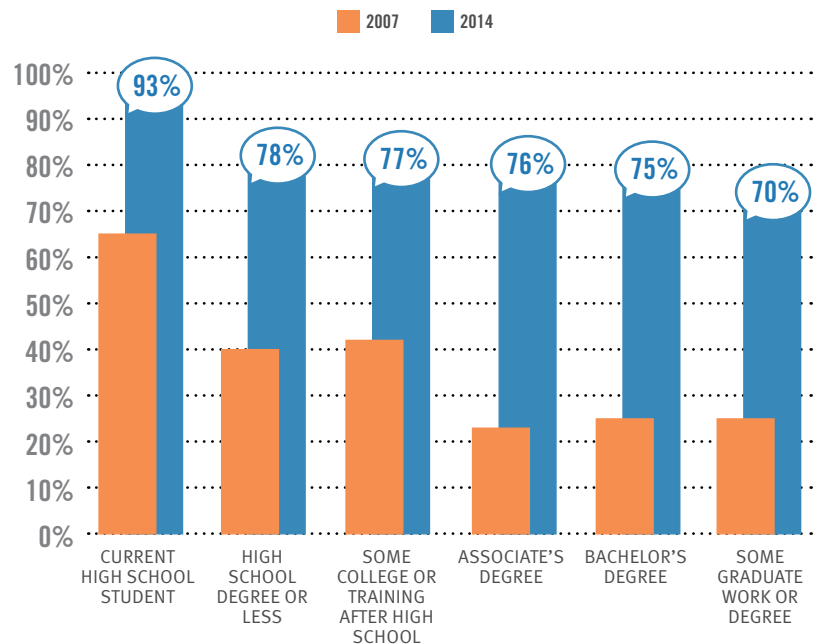
America is now an online nation, prepared and eager to adopt more and more virtual services that can improve lives, offer new convenience or bring economic value. These opportunities exist in education.

Articles and exposés talk about the soaring cost of postsecondary education, performance declines in elementary education, the need to retool the nation's workers for next-generation jobs, and baby boomers' desire to stay connected, engaged and involved post-retirement. All of these factors support the need for more, different and versatile forms of education. Likewise, this diverse set of community needs, already placing new demands on academic and public libraries, will only increase, while the budgets to support these needs will not.

How will shrinking budgets, mobile and Internet technology, and shifting consumer attitudes and needs spur on changes in education and library services?

Once again, we reached out to information consumers to see what they had to say. In this report, we bring together a decade of consumer trend analyses, updated with new data from two recent studies:

- Findings compiled from a survey of 3,700 U.S. online information consumers of all ages about their perceptions and attitudes on college, the cost of education, online learning and libraries;

- A unique study of 1,600 U.S. college parents and alumni who shared their attitudes and beliefs about the various services and facilities that make up the on-campus college experience—and the distinctive role that libraries play in that experience.

The research suggests that information consumers are skilled, equipped and incented to adopt new services that can bring convenience and flexibility to how they learn. They are actively engaged in online learning, and they like what they see. They anticipate that learning online will improve in quality and increase in popularity. They see a shift coming to education—and coming soon.

Economics, smartphones, tablets and an empowered online student body will fuel rapid change to traditional education and learning.

The 'information consumer' is becoming the 'online education consumer.'

But how swift and how disruptive will the shift be?

Traditional education providers have not been as eager to declare the coming radical change to campus-based education. Most professional educators and administrators would likely agree that changes in pedagogy and technology will shape the future of education, but many have spoken out to assert that the timing and extent of changes will not be as fast or as radical as some technology providers declare.

The debate has been fueled by the recent and rapid rise of perhaps the most radical alternative to traditional education in 200 years, the MOOC—massive open online course. MOOCs have been center stage at conferences, on blogs and in the press for more than two years. MOOC enthusiasts tout reach and community, critics cite MOOCs as interesting but lacking compelling results and with low completion rates. "For every 100 pupils who enrolled in a free course, something like five actually learned the topic. If this was an education revolution, it was a disturbingly uneven one" (Chafkin, 2013).

Point taken. When it comes to estimating the maturation rate of new technologies, we are often overly ambitious—think electric cars first conceived in the 19th century and the first e-book reader introduced (to little acclaim) a decade before the Kindle (which sold out within hours of hitting the market).

Gartner, a global information technology research firm, developed The Gartner Hype Cycle in 1995 as a strategy and planning tool, now regularly used by managers to track the adoption rate of new technologies.

The hype cycle recognizes that a technology trigger often launches new services into a market. Excited consumers and technologists can raise the new services or products to a level of inflated expectation. When the expectations are not met quickly enough, a period of disillusionment follows. If successful, the new (or no longer new) technology survives and evolves to reach market success. Most technologies, including online learning platforms and MOOCs, must navigate through these stages.
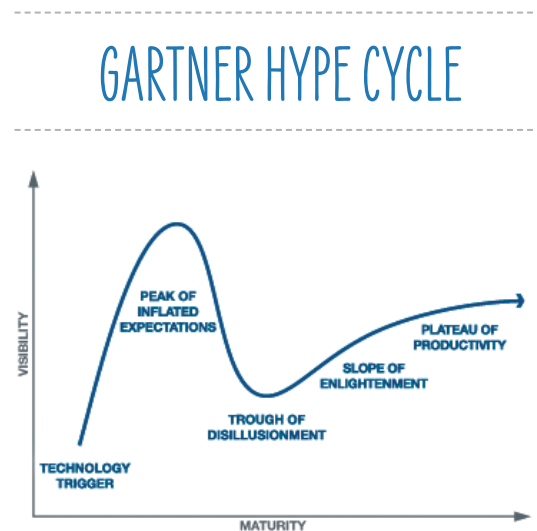
GARTNER HYPE CYCLE

Attribution: Gartner, Research Methodologies, Hype Cycle, http://www.gartner.com/technology/research/methodologies/hype-cycle.jsp

> "We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten. Don't let yourself be lulled into inaction."
>
> —Bill Gates, *The Road Ahead*

So, are we overzealous about how new technologies will change education? Or, are we missing important clues that indicate that we are moving with haste through the adoption cycle, ready to see widescale adoption of new learning practices that will change how educators and librarians manage? We need to look beyond the technology hype to answer the question.

It takes more than a new technology to create a tip. Other forces must come to bear to overcome the gravitational pull of well-established educational practice and institutional structure.

For a tip to come to the education market, or to drive mass change in any well-established market, three forces of change must align: Consumer **Behavior**. Effective **Technology**. **Economic** Incentive.

FORCES OF CHANGE

Markets tip when
3 factors come into alignment:

1. Consumer **Behavior**.
2. Effective **Technology**.
3. **Economic** Incentive.
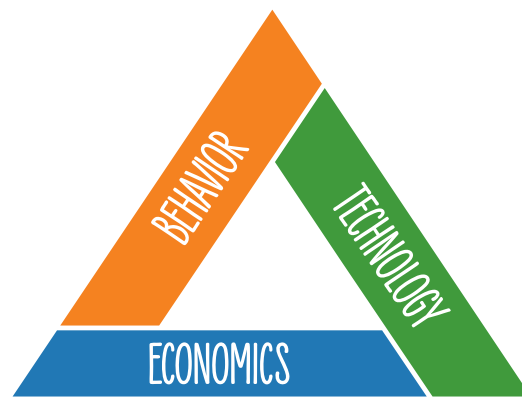
Data collected from this study, taken together with other recent consumer research and online learning platform usage statistics, provide compelling evidence of pressure along all three dimensions needed to create a tip. Empowered consumer behavior, effective technology tools and economic incentives are all pressing in the same direction—toward a new future for education and learning.

Forces of Change

▲ Behavior

Information consumers have amassed significant online and self-service skills. Internet use is nearly ubiquitous across ages, income and education levels. Information consumers spend 5+ hours online every day, shopping, socializing and learning (eMarketer, April 2014). The do-it-myself, at-my-pace, on-my-device approach to service has already supplanted many traditional face-to-face services from depositing checks to renewing automobile license plates. Online recommendations from a trusted source, a friend or a colleague are fueling new product trials and accelerating adoption of services and new buying behaviors.

▲ Technology

Prices for smartphones and tablets have been reduced, leading to mass market adoption. Since 2010, the average price of an iPad has dropped 48% (Newman, 2013). Tablet ownership is expected to grow by nearly 40% this year (Attard, 2014). Robust Internet access has helped to make YouTube the second most-used (46% visiting daily or weekly) online social networking service behind Facebook (67% visiting daily or weekly). The learning platforms fueling the rise of MOOCs are still in early stages, but today are able to support class sizes of 20,000 and hundreds of course offerings. The technologies required to power online education are here or on the horizon.

▲ Economics

The average annual price (including tuition, fees, room and board) for a U.S. four-year, in-state public college education was $17,474 in 2012-13 (NCES, Table 330.20, 2014). Assuming it takes four years to graduate, that is nearly a $70,000 investment. Over the last ten years, increases in college costs outpaced the inflation rate. Cost is the first thing that parents think of when they think about a college education. Affordability is the top factor for parents and students when choosing a college. College students are concerned about costs and most believe online education will decrease the cost of higher education.

The forces for change—behavior, technology, economics—are in alignment. A tipping point is near for education—and for libraries.

About this report:

Chapter One provides data about progress achieved with online learning. Information consumers are quickly adopting online learning for degrees, work advancement and self-enrichment. We will share what we learned about online learning models, including MOOCs, along with information consumers' impressions, their perceptions of online education today, and what they expect in the future.

Chapter Two explores attitudes about postsecondary education. We share data about what information consumers have to say about the cost and value of a college education. Students and parents provide insights into their selection and evaluation of the education experience—what they want and what they can afford.

Chapters Three to Six explore implications for the library.

Chapter Three returns to a conversation we have been exploring for some time—the library brand. What do users think about when they think about the library in 2014? What changed and what did not? We explore new opportunities and new challenges for the library brand as the information consumer adopts new online learning skills and attitudes.

Chapter Four explores the library's role in the on-campus experience. Using a perceptual mapping research technique, we map the beliefs of college parents and alumni to better understand their attitudes about the college experience and the library's role. The unique, and the not-so-unique, roles that campus libraries play in the overall education experience are uncovered. And we explore the early experiences that learners are having with the library while taking online classes.

Chapter Five provides a summary of what the research revealed about learners and libraries. A case study of the impact of MOOCs, and how they are applying the "immutable laws of marketing," principles of marketing success established by Al Ries and Jack Trout, to change users' perceptions of education, is presented.

Chapter Six summarizes the considerations and challenges for librarians as they prepare to support the online education consumer. We return to the discussion of the library brand and identify steps to take today to adapt and energize the brand and increase the relevance of libraries.

Learning Online: Participation and Perceptions

"The most beneficial experiences of online learning are probably the *flexibility of the schedule* and the fact I can go to class *in my pajamas.*"

COLLEGE STUDENT, FEMALE, AGE 18

"*Knowledge is power.* I have benefited many times from online learning."

MOTHER OF A COLLEGE STUDENT, AGE 43

We are enriching our lives online. We work, shop, bank, and socialize online. And we are learning online. Just under half of the online population have participated in online learning—enrolling in online degree classes and taking non-degree classes or watching tutorials to improve work and life skills.

Who are today's online learners? What types of online classes are they taking? What are their goals for taking online classes? Are their goals being met? What do they think about the quality of their learning experiences? What are their thoughts about MOOCs and the future of online learning? Chapter One addresses these questions.

IN THIS CHAPTER:

- A profile of the online learner

- Online learning is going mobile

- Top goals for online learning are being met

- MOOCs – Massively interesting

- Convenience trumps all other benefits of online learning

- 8 out of 10 recommend online learning

- Self-discipline is challenging for learners, both in the classroom and online

- Online learning is expected to only get better and more popular

Who Are the Online Learners?

Nearly half (48%) of the online population ages 16 and older have participated in online learning. They are participating in multiple online learning opportunities, using a variety of tools. Participation ranges from taking an online class for degree credit at a traditional or online-only college, or taking online non-degree classes or tutorials for work, continuing education or for personal growth (e.g., learning a language, developing computer skills, taking up a new hobby, etc.).

Benefiting from online skills honed by using other consumer or social-networking services, learners are showing a strong appetite and satisfaction level with online learning. Today, we see online learners spanning all age groups, income levels and education levels.

Nearly half of online Americans have participated in some type of online learning activity

ALL AGE GROUPS

Online learners cannot be characterized by age demographics. Our survey revealed that while the 25–35 age group has the highest percentage of online learners, all ages have participated in online learning. Some 40% of respondents ages 51 or older have taken a class online.

ALL AGES HAVE TAKEN ONLINE CLASSES OR TUTORIALS

Total respondents 48%

AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
50%	66%	49%	43%	39%

Have taken an online class or tutorial.
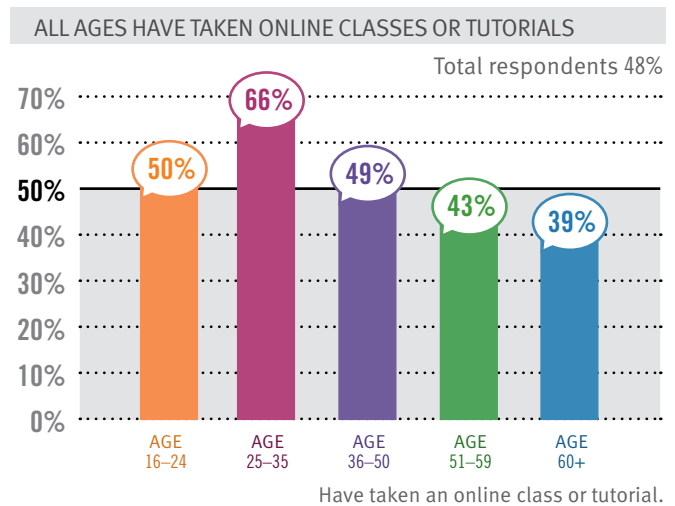
ALL INCOME LEVELS

Adoption of online learning is strong across all income levels. Top-end income earners have the highest percentage who are learning online, but very little difference in participation is noted across income levels less than $100,000 annually. Individuals in households earning less than $25,000 are just slightly less likely to participate in online learning than those earning $25,000 to $100,000.

ONLINE LEARNERS ACROSS ALL INCOME LEVELS

Total respondents 48%

LESS THAN $25,000	$25,000–$49,999	$50,000–$99,999	$100,000+
42%	45%	45%	59%

Have taken an online class or tutorial.
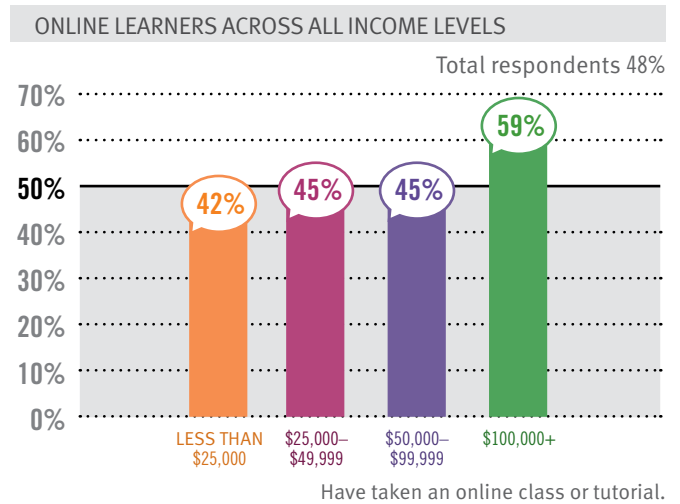
ALL EDUCATION LEVELS

Learners across all education levels are using online learning to continue to build their skills or strengthen their interests. Forty-four percent (44%) of high school students have taken an online class. Half or more of adults who have at least some post-high school education have taken an online class, and 27% of adults with a high school education or less are also participating in online learning.

HALF OR MORE WITH POST-HIGH SCHOOL EDUCATION ARE ONLINE LEARNERS

Total respondents 48%

CURRENT HIGH SCHOOL STUDENTS	HIGH SCHOOL DEGREE OR LESS	SOME COLLEGE OR TRAINING AFTER HIGH SCHOOL	ASSOCIATE'S DEGREE	BACHELOR'S DEGREE	SOME GRADUATE WORK OR DEGREE
44%	27%	48%	58%	57%	63%

Have taken an online class or tutorial.
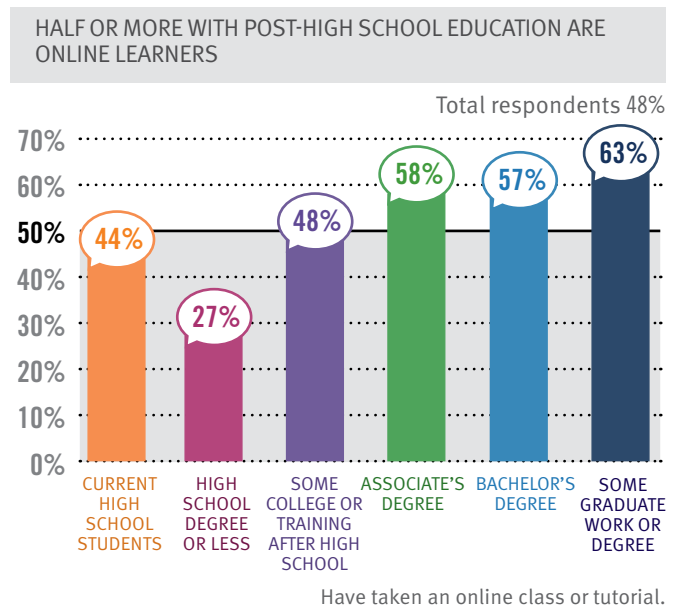
ALL LEVELS OF INTERNET USE

At least a third of the online population—even those who are online the fewest hours each week—are taking online classes. Not surprisingly, the more time they spend online, the more likely they are to participate in online learning. Experience breeds comfort, skills and usage.

MORE TIME SPENT ONLINE, MORE LEARNING ONLINE

Total respondents 48%

0–7 HRS	8–21 HRS	22+ HRS
31%	51%	57%

HOURS PER WEEK ONLINE

Have taken an online class or tutorial.
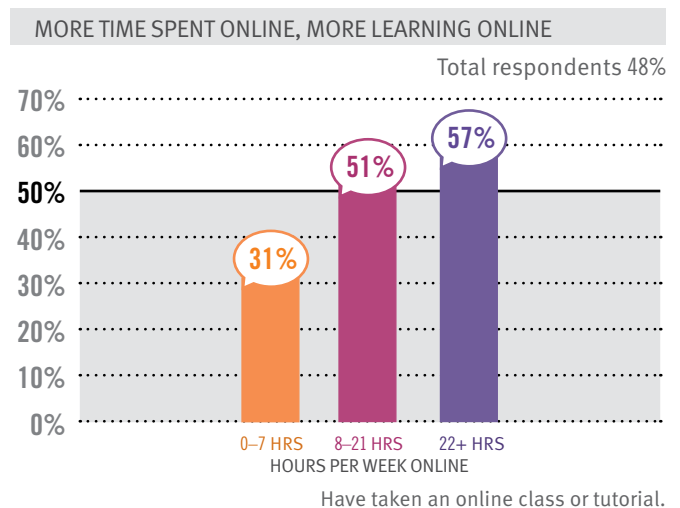
Early adoption patterns of online learning show some interesting differences when compared with the adoption patterns of other online services such as social networking. Our research identified wide differences in participation rates across age and income levels in social networking use in 2007. Not so for early online learning. While overall usage rates for online learning were low in 2007 (driven in part by fewer online learning opportunities), Americans gained experience in online learning together, at similar participation rates across age, household income and education levels. With the exception of the highest income level ($100,000+), the appetite to try online learning has been much more equally distributed across demographics than social networking. The rise of new learning platforms, such as MOOCs, is likely leading to higher participation rates by degree-seeking learners in the 25−35 age group in 2014.

HAVE TAKEN AN ONLINE CLASS OR TUTORIAL

2007   2014

AGE

	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
2014	50%	66%	49%	43%	39%

INCOME

	LESS THAN $25,000	$25,000–$49,999	$50,000–$99,999	$100,000+
2014	42%	45%	45%	59%

EDUCATION

	CURRENT HIGH SCHOOL STUDENTS	HIGH SCHOOL DEGREE OR LESS	SOME COLLEGE OR TRAINING AFTER HIGH SCHOOL	ASSOCIATE'S DEGREE	BACHELOR'S DEGREE	SOME GRADUATE WORK OR DEGREE
2014	44%	27%	48%	58%	57%	63%
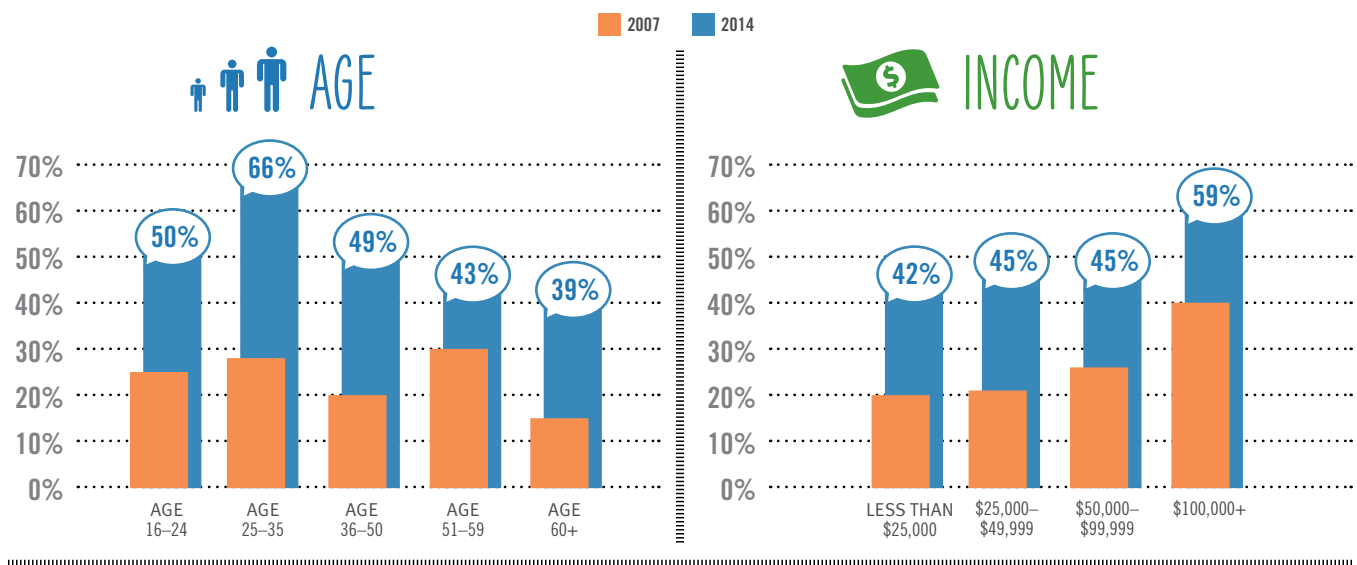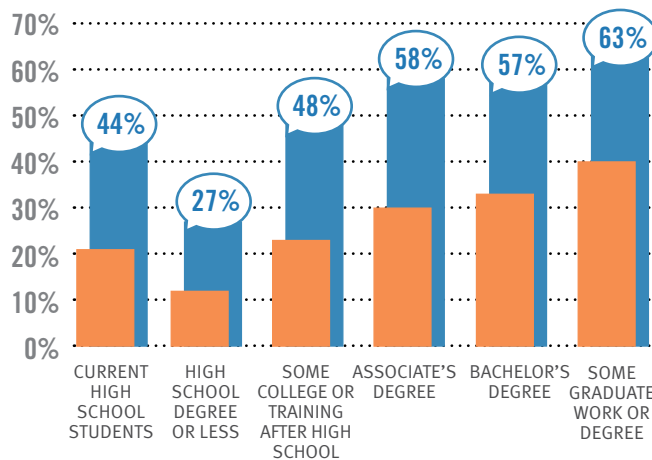
Learning on Our Mobile Devices

Smartphones, tablet computers and e-readers are experiencing dramatic growth. In the last four years, tablet ownership rose from less than 3% of adults owning one to 42% in 2014 (Pew, January 2014b). And, increasingly more time is spent on digital devices. Adults will spend 23% more time on mobile devices in 2014 than they did in 2013, according to forecasts (eMarketer, April 22, 2014). As they become more mobile, so too will learning activities.

While the majority of online learners use a laptop or desktop to take online classes, nearly a quarter of our survey respondents (21%) used a smartphone, tablet or e-reader to take an online class or tutorial. Age plays a factor with a larger percentage of online learners age 35 or younger using a mobile device to take an online class than older age segments. This pattern mimics the demographics of smartphone owners: the younger age groups are more likely to own a smartphone (Pew, January 2014a).

"Learning French through *an app on my phone* helped when I took French at my university."

COLLEGE STUDENT, FEMALE, AGE 18

MOBILE LEARNERS

Used smartphone, tablet or e-reader to take an online class or tutorial

Total respondents 21%

AGE 25–35 **40%**

AGE 16–24 **30%**

AGE 36–50 **16%**

AGE 60+ **10%**

AGE 51–59 **8%**

OCLC
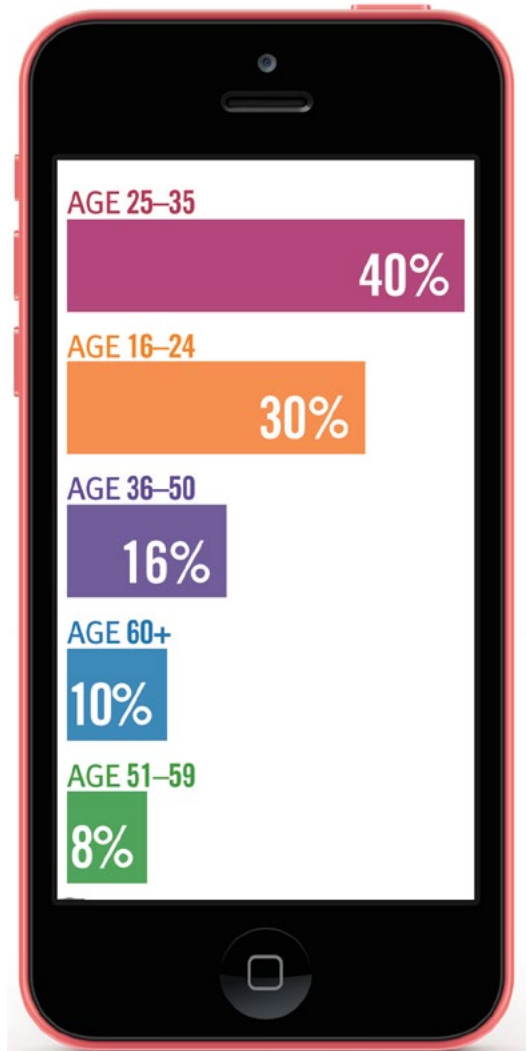
Taking Online Classes and MOOCs

Whether to earn a degree or to find a convenient method for self-enrichment, the breadth of subjects and variety of motivations for online learners are diverse.

Online degree classes

Just under a quarter (22%) of the online population have taken an online class toward a degree from a traditional or online-only college. The 25–35 age group has the highest participation rate, with 50% who have taken an online degree class.

Just under half (45%) of current college students have taken an online degree class.

Household income level is not a differentiating factor for participation in online degree classes. The online learning participation rates for degree classes are steady at just under a quarter across all income levels.

HAVE TAKEN AN ONLINE DEGREE CLASS

By college students and age

COLLEGE STUDENTS	TOTAL RESPONDENTS	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
45%	22%	22%	50%	22%	16%	6%

INCOME HAS NO BEARING

On taking an online degree class

LESS THAN $25,000	$25,000– $49,999	$50,000– $99,999	$100,000+
24%	24%	20%	23%

OCLC

About a quarter (22%) of adults with some college or training after high school (but no degree) have taken an online class toward a degree, as have a quarter (24%) of those with a bachelor's degree. Participation rates are highest for learners who have an associate's degree or some graduate work or degree. Just under one-tenth (7%) of current high school students have also taken an online degree class.

HAVE TAKEN AN ONLINE DEGREE CLASS

By highest level of education achieved

ASSOCIATE'S DEGREE
30%

SOME GRADUATE WORK OR DEGREE
30%

SOME COLLEGE OR TRAINING AFTER HIGH SCHOOL
22%

BACHELOR'S DEGREE
24%

HIGH SCHOOL DEGREE OR LESS
11%

CURRENT HIGH SCHOOL STUDENTS
7%
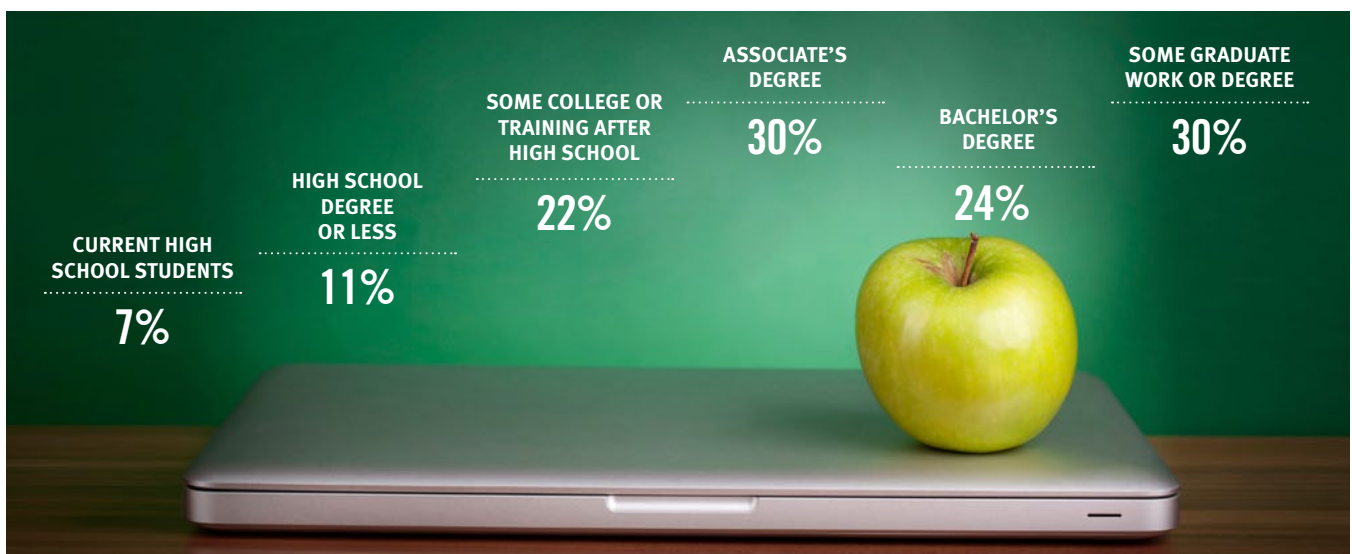
It is not surprising that the top reasons cited for taking an online degree class are to further education or for credit toward a degree. More illuminating is the data on the very high levels of learners who report they are successfully meeting their goals. Overall, 87% of those who have taken an online degree class indicated that their top goals were met. This high satisfaction level held constant for all age levels.

MY TOP GOAL WAS MET

TOTAL RESPONDENTS	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
87%	83%	86%	92%	90%	81%

TOP GOAL FOR TAKING ONLINE DEGREE CLASS:

TO FURTHER MY EDUCATION AGE 25+

CREDIT TOWARD A DEGREE AGE 16–24
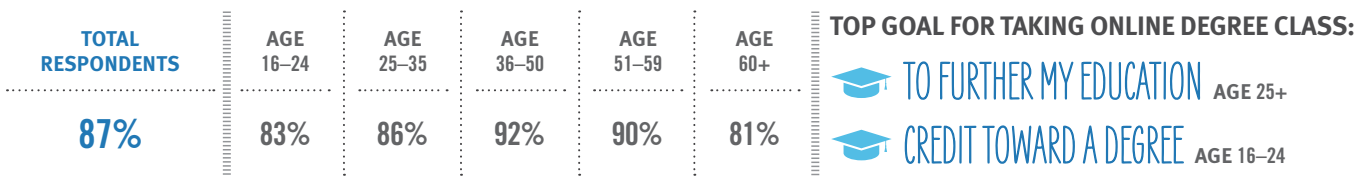
Base: Have taken an online degree class.

Online for Life: Personal Growth, Work and Continuing Education

Nearly a quarter (22%) of online users have taken an online class toward a degree. Almost twice as many (41%) are using online education for learning for life.

They are taking online classes or tutorials to grow their skills for work, to pursue their educational interests or for personal skill enhancement (e.g., learning a new language) and hobbies. A few are taking online classes to learn more about health and well-being.

Adults between the ages of 25 and 35 have the highest percentage of participation, but online use for lifelong learning is evident.

Personal growth is the primary aim for taking online non-degree classes for most online learners. Whether recreation or hobby-related, to enhance a skill or for a do-it-yourself project, online learning is meeting a need.

LEARNING FOR LIFE

HAVE TAKEN AN ONLINE CLASS OR TUTORIAL FOR PERSONAL GROWTH, WORK OR CONTINUING EDUCATION

TOTAL RESPONDENTS	41%	
AGE 16–24	38%	
AGE 25–35	50%	
AGE 36–50	42%	
AGE 51–59	40%	
AGE 60+	37%	
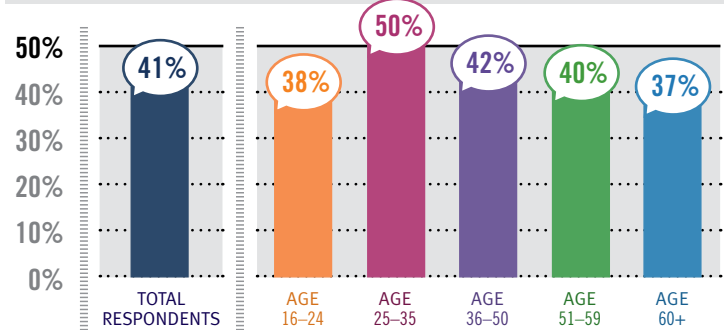
ONLINE CLASSES SUPPORT PERSONAL & PROFESSIONAL GROWTH

PERSONAL GROWTH   30%

RECREATION OR HOBBY   18%
REPAIR/DO-IT-YOURSELF   13%
PERSONAL SKILL ENHANCEMENT   13%
HEALTH-RELATED   8%

WORK-RELATED   24%

CONTINUING EDUCATION   17%

Base: Total respondents. **Note:** Respondents could select multiple reasons for taking online classes or tutorials.

Participation rates of online classes for personal growth, work or continuing education range from just over a tenth to more than a third, based on age. Those between the ages of 25 and 35 have the highest participation in all types of online non-degree classes or tutorials.

ONLINE CLASSES SUPPORT PERSONAL & PROFESSIONAL GROWTH

By age

	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
PERSONAL GROWTH	31%	37%	28%	30%	29%
FOR WORK	14%	28%	27%	27%	18%
FOR CONTINUING EDUCATION	11%	26%	18%	18%	12%

Base: Total respondents. **Note:** Respondents could select multiple reasons for taking online classes or tutorials.

Adults at the highest income level, over $100,000, are most likely to have taken online classes for continuing education, personal growth or work, but learners at all income levels are active online participants.

ONLINE CLASSES SUPPORT PERSONAL & PROFESSIONAL GROWTH

By income

	LESS THAN $25,000	$25,000–$49,999	$50,000–$99,999	$100,000+
PERSONAL GROWTH	26%	27%	29%	37%
FOR WORK	14%	19%	23%	34%
FOR CONTINUING EDUCATION	13%	15%	13%	24%

Base: Total respondents.
Note: Respondents could select multiple reasons for taking online classes or tutorials.

Learners across all education levels, with the exception of adults with a high school degree or less, are taking online classes for personal growth at roughly equal rates.

ONLINE CLASSES SUPPORT PERSONAL & PROFESSIONAL GROWTH

By education

	CURRENT HIGH SCHOOL STUDENTS	HIGH SCHOOL DEGREE OR LESS	SOME COLLEGE/ TRAINING AFTER HIGH SCHOOL	ASSOCIATE'S DEGREE	BACHELOR'S DEGREE	SOME GRADUATE WORK/ DEGREE
PERSONAL GROWTH	35%	16%	30%	36%	36%	40%
FOR WORK	12%	10%	21%	27%	33%	36%
FOR CONTINUING EDUCATION	10%	6%	15%	23%	20%	32%

Base: Total respondents. **Note:** Respondents could select multiple reasons for taking online classes or tutorials.

Online learners are having success. Overwhelmingly, learners taking online classes or tutorials for work, continuing education or personal growth or to pursue a degree say their top goal has been achieved. Success rates are roughly equal, and equally outstanding, across age and across the range of personal goals for learning online. From youth (83%) to seniors (81%), learners are advancing their education with online degree classes. Top goals for non-degree classes—learning about a topic of interest and furthering one's education and profession—are also being met at high levels.

9 OF 10 ONLINE LEARNERS SAY TOP GOAL WAS MET

	TOTAL RESPONDENTS	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
DEGREE CLASSES	87%	83%	86%	92%	90%	81%
NON-DEGREE CLASSES	93%	86%	86%	84%	90%	100%

Online vs. In-person Classes

How do online learners compare the effectiveness of online versus in-person classes?

For learners seeking a degree, differences in effectiveness are subject-dependent. Degree seekers believe classes in the humanities and social sciences, such as psychology or history, are equally effective online or in-person. But online learners see classes in business and natural and applied sciences as more effective in-person.

DEGREE CLASSES — SUBJECT AREA MATTERS

IN-PERSON AND ONLINE EQUAL   ONLINE CLASSES BETTER   IN-PERSON BETTER   UNDECIDED

SOCIAL SCIENCES AND HUMANITIES

BUSINESS

NATURAL AND APPLIED SCIENCES

SOCIAL SCIENCES
- 37%
- 19%
- 29%
- 15%

HUMANITIES
- 28%
- 25%
- 32%
- 15%

BUSINESS
- 28%
- 14%
- 41%
- 17%

HEALTH-RELATED PROFESSIONS
- 21%
- 13%
- 47%
- 19%

NATURAL/PHYSICAL SCIENCES
- 22%
- 12%
- 49%
- 17%

ENGINEERING
- 20%
- 9%
- 55%
- 16%

Base: Have taken online and in-person degree class.

Around 40% of learners taking online classes for personal growth, work or lifelong learning see either method—online or in-person—as equally effective.

NON-DEGREE CLASSES — EQUAL ONLINE AND IN-PERSON

IN-PERSON AND ONLINE EQUAL   ONLINE CLASSES BETTER   IN-PERSON BETTER   UNDECIDED

PERSONAL GROWTH

CONTINUING EDUCATION
- 40%
- 15%
- 34%
- 11%

WORK-RELATED
- 39%
- 18%
- 33%
- 10%

HEALTH-RELATED
- 41%
- 18%
- 25%
- 16%

RECREATION/HOBBY
- 41%
- 16%
- 32%
- 11%

PERSONAL SKILL ENHANCEMENT
- 38%
- 16%
- 33%
- 13%

REPAIR/DIY
- 36%
- 15%
- 36%
- 13%

Base: Have taken an online non-degree class or tutorial.
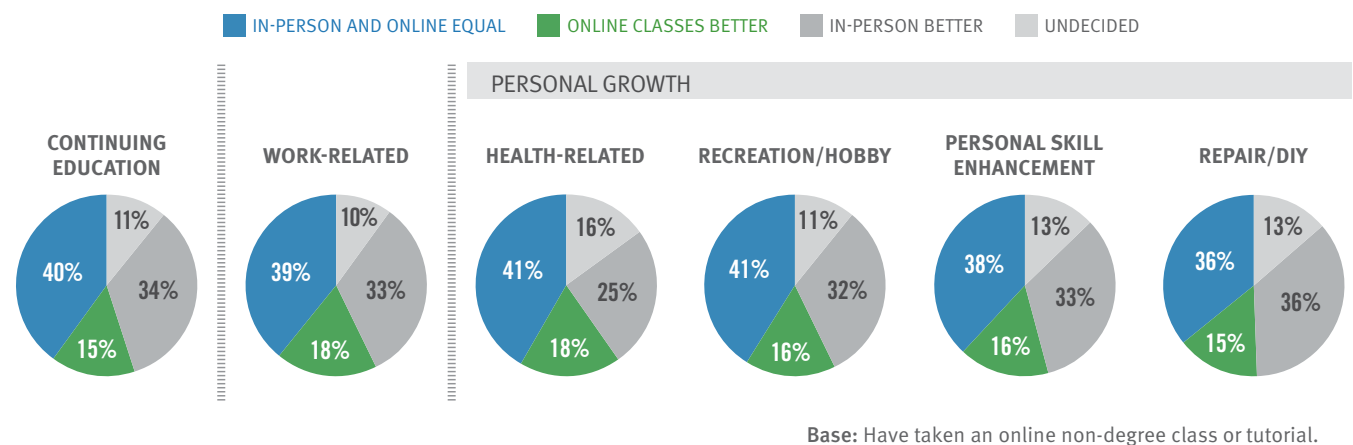
MOOCs – Massively Interesting

Massive open online courses, or MOOCs, are courses of study offered over the Internet, often for free, to large numbers of learners.

The attention on MOOCs has risen steadily. MOOC fans and critics are vocal about the potential for this latest online learning model. Some have hailed MOOCs as "the next great technological disruption in education" (Fowler, 2013), and as "a shiny new toy in the toolbox [of] online education offerings" (Straumsheim, 2014). *The New York Times* called 2012 "The Year of the MOOC" (Pappano, 2012).

MOOC critics, on the other hand, are less enthusiastic. The sustainability of the economic model for the larger MOOC providers is questioned. Low completion rates for students enrolled in MOOCs and the quality of the learning experience are often cited as concerns about the long-term viability of MOOCs. A May 2014 study found that students do not retain or apply the knowledge learned from their often passive involvement in MOOCs (Perez-Hernandez, 2014).

But as critics and advocates continue their debates, more learners are signing up and new MOOC courses are being added. Leading MOOC providers report millions have used MOOCs and hundreds of courses are available in online catalogs.

Our survey indicated, however, that MOOCs are still relatively unknown and unexplored by the majority of online users. Just 13% of survey respondents indicated that they were familiar with the term "MOOC," and only 3% have participated in a course. College students are more familiar with the term. A quarter of college students are familiar with "MOOCs," and 8% have taken one.

FEW ARE FAMILIAR WITH THE TERM "MOOC"

HAVE HEARD OF A MOOC   HAVE TAKEN A MOOC

	TOTAL RESPONDENTS	COLLEGE STUDENTS
Have heard of a MOOC	13%	27%
Have taken a MOOC	3%	8%

OCLC
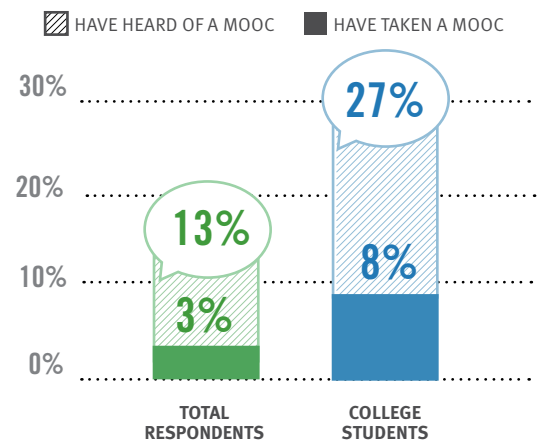
MOOC participation (3%) is significantly smaller than reported participation in online degree (22%) or non-degree (41%) classes. The age, income and education distribution patterns, though, are very similar. The younger are more aware of MOOCs, and income levels have little differentiation. Higher Internet use aligns with higher MOOC awareness and use, as it does for online learning in general.

Similar to other recent studies focused on the demographics of MOOCs (Ho et al., 2014; Christensen et al., 2013), our findings indicate those who already have a college degree are more likely to have taken a MOOC.

MOOCS EXAMINED

HAVE HEARD OF A MOOC   HAVE TAKEN A MOOC   **Total respondents:** 13% have heard of and 3% have taken a MOOC.

AGE

	16–24	25–35	36–50	51–59	60+
Heard	20%	22%	13%	7%	7%
Taken	5%	7%	2%	1%	2%

INCOME

	Less than $25,000	$25,000–$49,999	$50,000–$99,999	$100,000+
Heard	10%	13%	12%	15%
Taken	3%	4%	2%	4%

EDUCATION

	Current High School Students	High School Degree or Less	Some College or Training After High School	Associate's Degree	Bachelor's Degree	Some Graduate Work or Degree
Heard	14%	10%	9%	8%	16%	23%
Taken	2%	3%	3%	1%	3%	5%

INTERNET USE

	0–7 HRS	8–21 HRS	22+ HRS
Heard	10%	12%	18%
Taken	2%	2%	5%

HOURS PER WEEK

MOOC Goals are Met

TOP GOAL

LEARN ABOUT
A TOPIC
OF INTEREST

GOAL MET

81%

Base: Have taken a MOOC.

What are the reasons for taking a MOOC? Our survey results indicate that the top reason users are taking MOOCs is not to complete a course for degree credit, but to learn about a topic of interest. Much criticism of MOOCs has been around the low completion rates. While thousands, or even tens of thousands, register for some MOOCs, completion rates are low, usually less than 10% (Ho et al., 2014). If the primary goal for taking a MOOC, however, is not about getting credit for having completed the course, completion rates are only one measure of user success.

Consistent with online learning success rates for degree and for personal enrichment, the satisfaction rates among MOOC users in our study are high. Eighty-one percent (81%) of MOOC participants indicate that their top goal—to learn about a topic of interest—was met. Other reasons to take a MOOC include to train for a career, to increase work skills or to satisfy a curiosity.

Degree-seekers also report success. College students' top goal for taking a MOOC was to obtain personal recognition or certification—84% said that their top goal was met.

Our findings suggest that more exploration around the goals of MOOC users will offer valuable insight into the potential of these new learning platforms. As a recent study on the expectations and realities of MOOCs concludes, "Educators must get beyond the notion that course completion per se equates with learning and consider how to allow learners to demonstrate valuable competencies...that may be acquired through MOOC participation" (Hollands & Tirthali, 2014).

Online Learning: A Positive Experience

Respondents shared that their experiences with taking online classes have been positive. As reported earlier, their goals are being met. Online learners would recommend online education to a friend or colleague, and most rate the overall quality of their online education experience as *"excellent"* or *"good."* The vast majority believe the classes have been worth as much as, if not more than, what they paid. They find value in both the classes that were free and classes with a fee.

What are the attributes that create positive experiences for learners? The survey highlights several drivers of satisfaction, but one attribute clearly outpaced all others: **convenience.**

Convenience Wins

Online learners reported, loudly and clearly, that convenience is the most beneficial aspect of their online learning experience. It topped the list of benefits across every age group, education and income level.

The convenience of taking classes online, where and when learners want, makes online learning powerful. Flexible scheduling, being able to take the class at home and learning at the exact moment they need to were given high marks by users. As one high school student stated, "Being able to listen to lessons on my own time without being on a strict schedule allowed me to enjoy other activities as well." Or, in the words of a 67-year-old woman, "Being able to study on my own, in my own time and space" was the most beneficial aspect of online learning.

The information and knowledge gained are other beneficial aspects of online learning. Comments included phrases such as "furthering my education" and "expanding my knowledge" or as one 30-year-old man wrote, "DIY websites—I never knew I could do 75% of this stuff!" A 57-year-old man explained it simply as, "I learned how to learn."

TOP BENEFITS OF ONLINE LEARNING

51% Convenience

17% Knowledge gained

16% Learn at my own pace and ability to review course content

3% Affordability

Base: Have taken an online class or tutorial.

Coded responses from an open-ended question, "Thinking about your overall online learning experiences, what would you say has been the most beneficial aspect of those experiences?"

The ability to learn at one's own pace and to review the content as often as needed are also important benefits of online learning. One 53-year-old learner explained, "Most were video-based, where I go at my own pace. That aspect is nice, because I could go back and review things I might have missed, or didn't quite get the first time."

While affordability is not ranked as the primary benefit for learning online, respondents commented enthusiastically about the economic value. A 36-year-old woman said, "I'm able to learn a variety of subjects without the cost." A 20-year-old female college student shared, "Being able to have a free college-level education. I did not have to pay a cent and still could learn topics related directly to my courses."

Many benefits of online learning were cited. Users also shared that challenges exist as well. Self-discipline topped the list. Challenges that students may have with their in-person classes, such as meeting deadlines and juggling course work with other responsibilities, are also challenges with online learning. A 19-year-old college student described her challenge as, "Making sure I pace everything correctly and don't overburden myself with work at the end."

The lack of personal interaction with both peers and instructors was a challenge expressed by 27% of the online learners in our study. A 52-year-old man found it challenging that he "didn't have face-to-face interaction with the instructor or other students to 'dig deeper' or share experiences." A similar sentiment was mentioned by a 49-year-old woman who said, "I miss the student interaction—it can be as helpful as the actual class." Four percent (4%), however, mentioned the lack of personal interaction as a benefit of online learning; limiting distractions is helpful to them.

Eleven percent (11%) of online learners said that they did not encounter any challenges in their online learning experiences.

TOP CHALLENGES ONLINE LEARNERS ENCOUNTER

35% Self-discipline

27% Lack of personal interaction

11% No challenges encountered

Base: Have taken an online class or tutorial.

Coded responses from an open-ended question, "What has been the most challenging aspect of your online learning experiences?"

ONLINE CLASSES ARE RECOMMENDED

PERCENTAGE WHO WOULD RECOMMEND ONLINE CLASSES	COLLEGE STUDENTS	TOTAL RESPONDENTS	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
DEGREE CLASSES	75%	77%	65%	81%	74%	82%	84%
NON-DEGREE CLASSES	80%	84%	74%	83%	82%	87%	90%

Base: Have taken an online class or tutorial.

ONLINE CLASSES ARE WORTH THE INVESTMENT

■ AGREE   ■ AGREE

FOR-FEE ONLINE CLASSES: WORTH WHAT THEY COST – OR MORE

DEGREE CLASS	NON-DEGREE CLASS
72%	74%
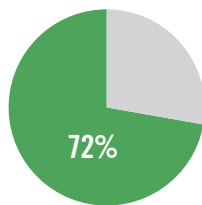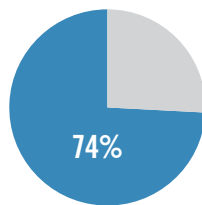
FREE ONLINE CLASSES: WORTHWHILE AND NO COST

DEGREE CLASS	NON-DEGREE CLASS
73%	90%
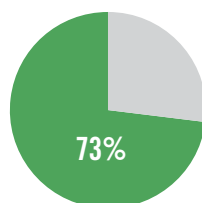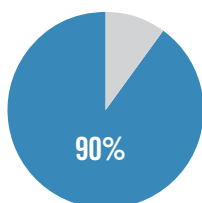
Base: Have taken an online class or tutorial.

Online learners say that their goals are being met, they like the convenience of learning at their own pace, on their own schedule, and they would recommend this experience to others.

Whether free, or for a fee, about three-quarters or more of online learners feel that online learning is worth the investment of their time and their dollars.

Online Learning—the Best is Yet to Come

Online learners are not only positive about their recent experiences but also believe that online learning will only continue to improve.

Perhaps influenced by the steady flow of improvements and advances experienced in other online services, such as commerce and social sites, the majority of the online learners surveyed expect both the quality and the popularity of online learning to continue to advance over the next three years.

QUALITY AND POPULARITY WILL IMPROVE

TOTAL RESPONDENTS WHO HAVE TAKEN AN ONLINE CLASS OR TUTORIAL	DEGREE CLASSES	NON-DEGREE CLASSES	MOOCS
EXPECT QUALITY TO IMPROVE	62%	61%	51%
EXPECT POPULARITY TO INCREASE	69%	67%	59%

TOTAL RESPONDENTS WHO HAVE **NOT** TAKEN AN ONLINE CLASS OR TUTORIAL	DEGREE CLASSES	NON-DEGREE CLASSES	MOOCS
EXPECT QUALITY TO IMPROVE	46%	45%	38%
EXPECT POPULARITY TO INCREASE	52%	47%	40%

Even those who indicated that they have not participated in any online learning activities expressed optimism about the future of online learning. Nearly half or more of non-users expect online degree and non-degree classes to improve in both quality and popularity. Online classes toward a degree represent the group of classes most expected to increase in popularity and quality. Even though respondents indicated they were not too familiar with MOOCs, many also expect this new online learning format to grow in popularity and quality. Among those who have taken a MOOC, 75% expect the quality of MOOCs will improve and 77% feel the popularity will increase in three years.

Nearly half (46%) of online learners expect that online learning will decrease the overall cost of higher education. The belief that online access will lower cost held consistent across age groups and income levels.

Respondents who have not yet tried taking online classes indicated that they are not too likely to take a college-level class for credit in the future. About a third anticipate trying one if offered for free; just under a fifth said they would participate if offered for a fee. These respondents were equal in their appetite for education via online and in-person classes.

> "**Online learning is going to grow.** This is particularly true when one considers the cost of building, staffing and maintaining 'brick-and-mortar' buildings."
>
> MALE, AGE 68

College students who have not yet taken any online classes were enthusiastic. Sixty percent (60%) indicate that they would take an online class for college credit if offered for free, and 40% would take one for a fee. They are less likely to take a class if not offered for credit.
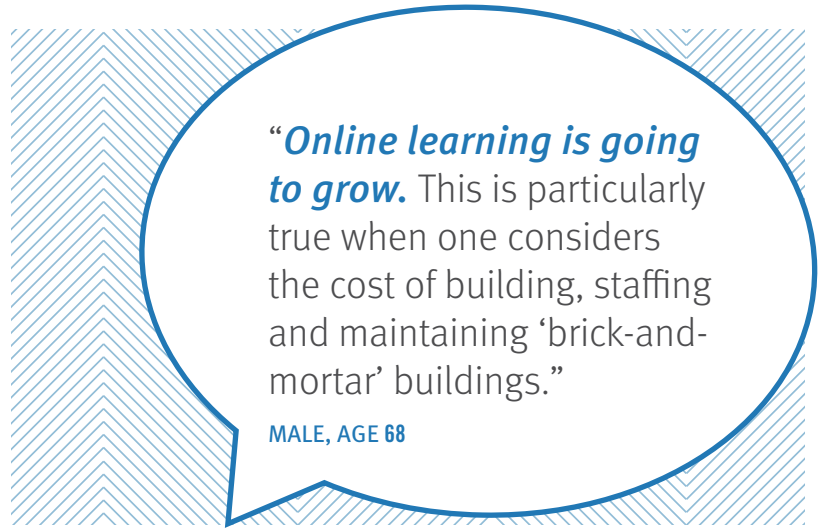
LIKELIHOOD TO TAKE AN ONLINE DEGREE CLASS IN THE FUTURE

IF FREE   IF REASONABLE COST   Very likely or likely ratings

TOTAL RESPONDENTS WHO HAVE NOT TAKEN AN ONLINE CLASS BUT EXPECT TO

FOR DEGREE CLASS

- ONLINE CLASS: 30% (16%)
- IN-PERSON CLASS: 29% (19%)

FOR NON-DEGREE CLASS

- ONLINE CLASS: 18% (8%)
- IN-PERSON CLASS: 17% (7%)

Base: Total respondents who have not taken an online class/tutorial.

COLLEGE STUDENTS WHO HAVE NOT TAKEN AN ONLINE CLASS BUT EXPECT TO

FOR DEGREE CLASS

- ONLINE CLASS: 60% (40%)
- IN-PERSON CLASS: 72% (60%)

FOR NON-DEGREE CLASS

- ONLINE CLASS: 16% (7%)
- IN-PERSON CLASS: 32% (18%)

Base: College students who have not taken an online class/tutorial.

Online learners predict that online classes will continue to grow in popularity and quality. In fact, almost half (46%) of current college students believe students will be taking at least half of their classes online within the next five years. And 68% of college students believe at least half of college classes will be online in the next decade.

Even those not currently enrolled in college believe online classes will soon be a significant part of the college experience. A third (35%) believe college students will take at least half of their classes online within the next five years.

ONLINE CLASSES ARE GOING MAINSTREAM

Half OF COLLEGE CLASSES WILL BE ONLINE IN FIVE YEARS

SAY **46%** OF COLLEGE STUDENTS

The learning activities and attitudes of the online population were explored in this chapter. Three graphical summaries of what the research revealed about online learners follows:

- Summary view reflecting perceptions of all respondents,

- Views of parents who are funding or planning to fund some portion of their child's college education, and

- Views of college students who are funding some portion of their education.

Chapter Two explores parent and student perceptions and attitudes about a college education.

TOTAL RESPONDENTS

48% of Americans who use the Internet have taken an online class or tutorial

91% say their goals were met

Online learners are having success and meeting their goals

69% rate their online classes as excellent or good

82% would recommend that others take online classes

73% say their online classes were worth as much as or more than what they paid

66% say online classes will become more popular

60% say the quality of online classes will improve

46% expect online learning to decrease the cost of higher education

43% believe that students will take at least half of their classes online in five years

AT A TIPPING POINT

PARENTS FUNDING SOME PORTION OF THEIR CHILD'S COLLEGE EDUCATION

49% of parents paying for college have taken an online class or tutorial

94% say their goals were met

Parents who are funding their child's college education have positive perceptions of online learning

70% rate their online classes as excellent or good

83% would recommend that others take online classes

79% say their online classes were worth as much as or more than what they paid

64% say online classes will become more popular

58% say the quality of online classes will improve

43% expect online learning to decrease the cost of higher education

36% believe that students will take at least half of their classes online in five years

OCLC

COLLEGE STUDENTS FUNDING SOME PORTION OF THEIR EDUCATION

64% of students paying for college have taken an online class or tutorial

85% say their goals were met

College students who are funding their education are having success with online learning

67% rate their online classes as excellent or good

76% would recommend that others take online classes

84% say their online classes were worth as much as or more than what they paid

59% say online classes will become more popular

55% say the quality of online classes will improve

45% expect online learning to decrease the cost of higher education

52% believe that students will take at least half of their classes online in five years

OCLC

Higher Education: Perceptions and Choices

A + COLLEGE + EDUCATION =

"I think of how outrageously expensive it is."
COLLEGE STUDENT, FEMALE, AGE 18

"Being in debt for the rest of my life."
FATHER OF A HIGH SCHOOL STUDENT, AGE 51

"The only way to get a decent job, but it's way too expensive."
HIGH SCHOOL STUDENT, FEMALE, AGE 16

"It is necessary, but super expensive!"
MOTHER OF A COLLEGE STUDENT, AGE 37

"Expensive. Students leaving with mounds of debt!"
MOTHER OF A HIGH SCHOOL STUDENT, AGE 51

"Being broke and without enough sleep for a long time!"
COLLEGE STUDENT, MALE, AGE 24

"A lot of money that I don't have."
HIGH SCHOOL STUDENT, FEMALE, AGE 17

Consumers of higher education have far more choices today than just five years ago. Data from the National Center for Education Statistics (NCES) indicate an overall increase of nearly 10% in the total number of degree-granting postsecondary institutions between the 2007-08 and 2012-13 school years. The most dramatic growth has taken place among four-year for-profit, private institutions with a 60% increase over the last five years (NCES, Table 317.10, 2014).

Online education options increased as well. In 2002, approximately 70% of higher education institutions offered some kind of online classes (Allen & Seaman, 2013). By 2013, that number had risen to 85% (Allen & Seaman, 2014).

IN THIS CHAPTER:

- Perceptions of a college education

- The cost/value imbalance

- Affordability is the top factor influencing the choice of college

- An on-campus experience is still important—especially to those paying the bills

More options and a rapid rise of alternatives to the on-campus, four-year postsecondary education model are being fueled by the economics of higher education.

The inflation-adjusted average annual costs for tuition and required fees (excluding room and board) at U.S. colleges and universities have increased by 40% over the last ten years (NCES, Table 330.10, 2014), significantly outpacing wage growth (21%) (Bureau of Labor Statistics, 2014). The increase in inflation-adjusted college prices is even higher for four-year public, in-state institutions at 57% (NCES, Table 330.20, 2014). Personal savings and current household incomes have not been able to fund these growing fees. Student loan debt has funded the imbalance. As of April 2014, the student loan debt in the U.S. was a staggering $1.2 trillion (Douglas, April 2014).

It is no surprise, then, that parents and students indicated that cost is the top criterion for evaluating and weighing their education options. Location, convenience and quality are all considerations that go into the decision of if, and where, to pursue a postsecondary education, but cost is the top determinant. Students and parents are "education consumers," shopping and evaluating price alternatives in much the same way they make other major purchasing decisions—cars, homes and vacations.

Many learners are now seeking a road to a job or career in addition to or ahead of a general education. Many adults find themselves going back to school to refresh professional skills or prepare for a new career. NCES projects a 10% increase in enrollment for those age 18 to 24, often considered the age group of the "traditional college student." Increases in enrollment for older students, however, are projected to be at least double the rate of the traditional college age group (NCES, 2013). Our research also shows that the average age of the college student has increased over the last decade.

These trends and projections support that "just-in-time" education, a term used by John Katzman, founder of the *Princeton Review*, is gaining traction. "The real key in a world in which people are changing jobs all the time is short-term learning that is very connected to the next job you are going to get" (Selingo, March 2014).

This chapter will explore how today's students and parents are making choices and evaluating education options and trade-offs.

PROJECTED INCREASE IN COLLEGE ENROLLMENT 2010–2021

By age

| 30% |
| 20% |
| 10% |
| 0% |

10% — AGE 18–24
20% — AGE 25–34
25% — AGE 35+

Source: NCES, 2013.

OCLC
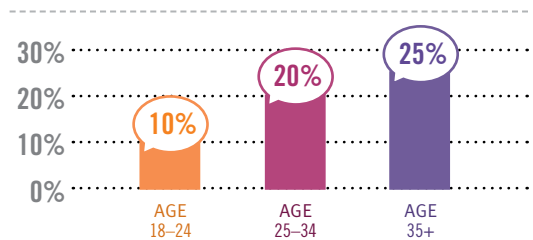
Perceptions of a College Education

What is the first thing parents and students think of when they think of a college education?

We posed this open-ended question to college freshmen and sophomores, high school juniors and seniors, and parents of college and high school students.

Top of mind for parents: cost/debt.

Top of mind for students: road to a job/career.

Parents' perceptions of college included such things as career opportunities, jobs, hard work and campus life; but the most commonly cited perception—cost/debt (30%). As one mother put it, "A lot of money hopefully well spent!" Another simply said, "Very costly."

Money, cost, expense and debt were also on the minds of high school and college students, but students were most likely to indicate that "a road to a job/career" (26%) was their first impression of a college education.

"Expensive but increases likelihood of better employment in the future," was how one college student said it. And in the words of a high school student, "A place to get the experience you need to have a successful career."

The perception of a college education as the road to self-enrichment, if it ever existed, is not a primary view among parents and students today. Expressions such as "better way of life" or "brighter futures" were expressed as top-of-mind for some students (14%) and parents (11%), but these impressions were a minority view.

Obtaining a job or career, and the cost to do so, are the top-of-mind perceptions of college for today's education consumers.

TOP-OF-MIND

perception of college education among parents and students

PARENTS

COST/DEBT

COLLEGE AND HIGH SCHOOL STUDENTS

JOB/CAREER

Coded responses from an open-ended question, "What is the first thing you think of when you think of a college education?"

A Cost/Value Imbalance

The inflation-adjusted cost of tuition and required fees (excluding room and board) has increased by 40% over the last ten years for U.S. degree-granting postsecondary institutions. Ten years ago, the average annual cost for tuition and required fees at four-year private institutions was about $17,000. For the 2012-13 school year, the cost had risen to $24,525, an increase of 15% after adjusting for inflation. The average annual cost at four-year public institutions increased from $4,046 to $8,070 for in-state students, an increase of 57% in inflation-adjusted dollars. Two-year public, in-state inflation-adjusted costs increased by 48%, from just under $1,500 to $2,792 (NCES, Table 330.10, 2014).

U.S. HIGHER EDUCATION LANDSCAPE

Degree-granting Institutions (2012-13)

	FOUR-YEAR PRIVATE	FOUR-YEAR PUBLIC	TWO-YEAR PUBLIC
NUMBER OF INSTITUTIONS	2,337	689	934
ANNUAL ENROLLMENT (in millions)	5.4	8.1	6.8
ANNUAL TUITION & FEES (averages)	$24,525	In-state $8,070 / Out-of-state $21,847	In-state $2,792 / Out-of-state $6,767

Source: NCES, **Tables:** 303.25; 317.10; 330.10; 330.20, 2014.

Both enrollment and costs have increased over the past decade. Annual enrollment has increased 50% for four-year private and 25% for four-year public institutions from 2002 to 2012.

Growth in both the number of institutions and enrollment has also occurred for online-only colleges. Total numbers reported vary as there is no comprehensive source of data on online-only colleges today. We do know that there is a far greater proportion (62.4%) of higher education institutions offering fully online degree programs in 2012 than in 2002 (34.5%) (Allen & Seaman, 2013).

The high cost of education has made it difficult to fully fund all education expenses. Only 14% of parents expect to fund the total cost of their child's college education. About a third expect to cover 50% or more.

Sixteen percent (16%) of parents do not fund or plan to fund any part of their child's postsecondary education—the balance will be funded by the students, by loans or other forms of financial support. Three-fourths of current college students also contribute funding toward their college costs.

Two-thirds of high school students expect to help pay their college tuition bills.

PARENTS AND STUDENTS SHARE THE COST

	YES—100% OF THE COST	YES—50–99% OF THE COST	YES—30–49% OF THE COST	YES—LESS THAN 30% OF THE COST	NO	NOT SURE YET

PARENTS	14%	20%	16%	23%		16%	11%
HIGH SCHOOL STUDENTS	7%	14%	18%	25%		8%	28%
COLLEGE STUDENTS	14%	14%	16%	29%		24%	3%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
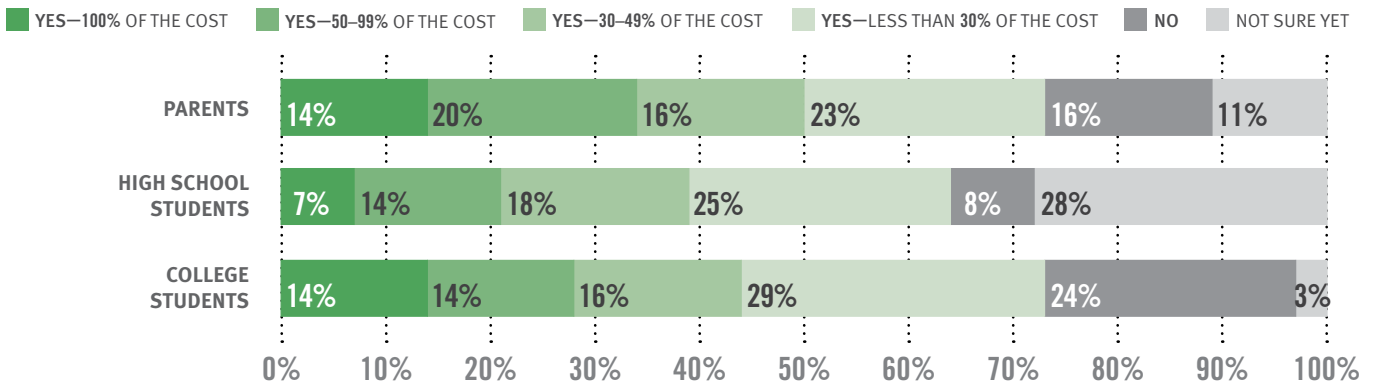
Parents were asked: "Are you/will you be personally funding all or a portion of your child's college education?"

Students were asked: "Are you/will you be personally funding all or a portion of your college education?"

OCLC

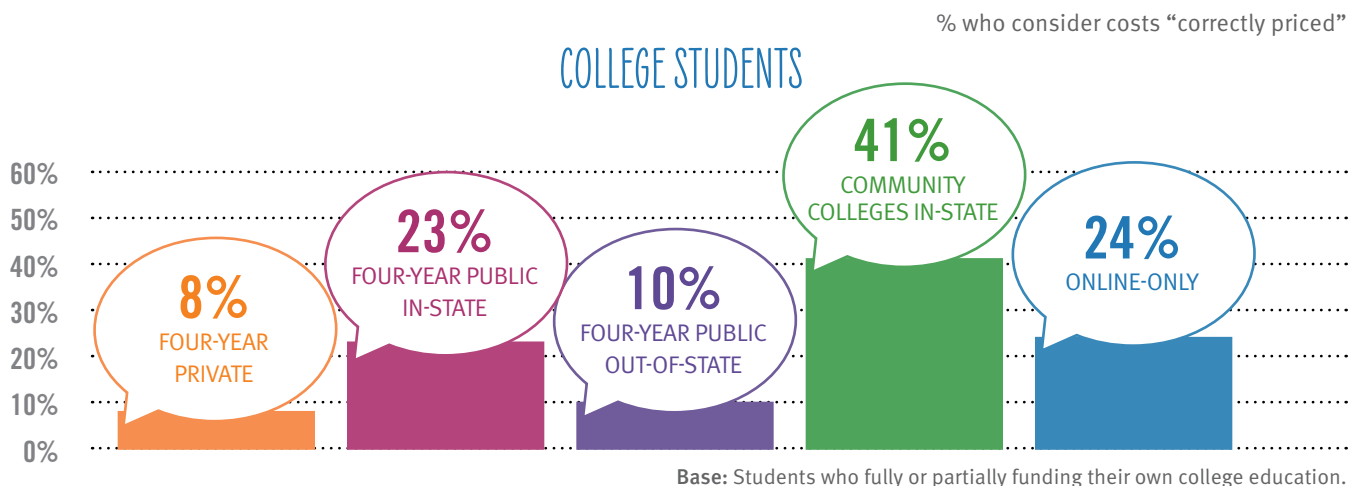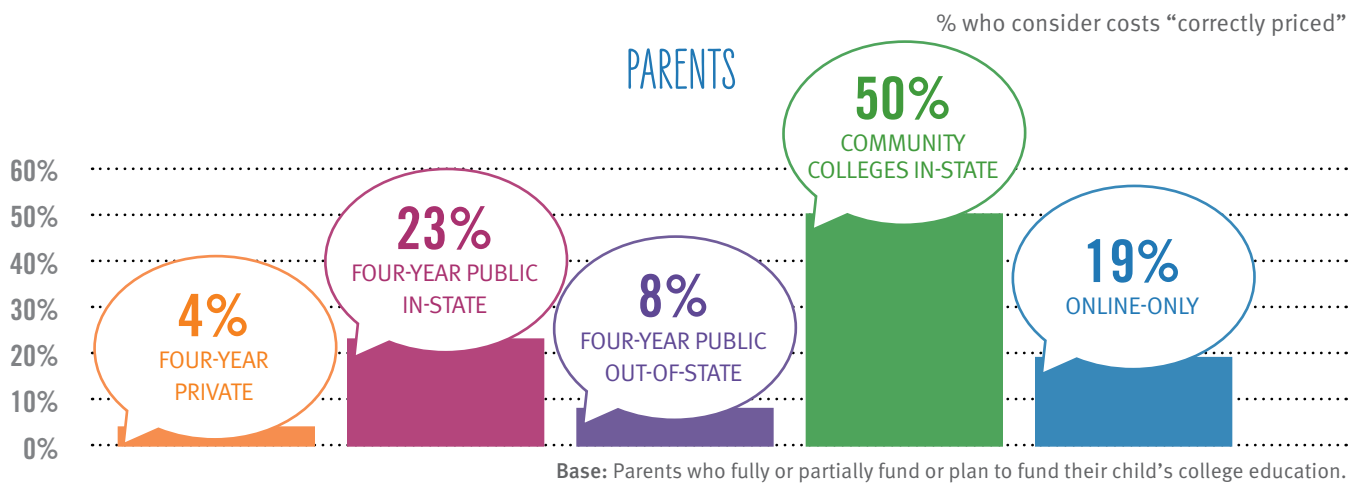The perceived value received from a higher education is out of balance with the cost paid. Our survey results revealed that just 23% of parents and college students who are funding a college education feel that the value of a public in-state, four-year college education equals the costs.

This cost/value imbalance is even greater for four-year public, out-of-state and private institutions; 8% of parents who are funding the cost believe that four-year, out-of-state public institutions are correctly priced; just 4% for private institutions. College students have similar perceptions. Just 23% who are funding some part of their education believe that four-year public, in-state institutions are correctly priced.

COLLEGE COST/VALUE TRADE-OFF IS OUT OF BALANCE

Not many consider college "correctly priced" for the value

% who consider costs "correctly priced"

PARENTS

4% FOUR-YEAR PRIVATE

23% FOUR-YEAR PUBLIC IN-STATE

8% FOUR-YEAR PUBLIC OUT-OF-STATE

50% COMMUNITY COLLEGES IN-STATE

19% ONLINE-ONLY

Base: Parents who fully or partially fund or plan to fund their child's college education.

% who consider costs "correctly priced"

COLLEGE STUDENTS

8% FOUR-YEAR PRIVATE

23% FOUR-YEAR PUBLIC IN-STATE

10% FOUR-YEAR PUBLIC OUT-OF-STATE

41% COMMUNITY COLLEGES IN-STATE

24% ONLINE-ONLY

Base: Students who fully or partially funding their own college education.

> "*A worthwhile investment*."
> COLLEGE STUDENT, FEMALE, AGE 18

> "*An over-priced necessity*, a great opportunity for a young adult to explore the world."
> FATHER OF A HIGH SCHOOL STUDENT, AGE 53

> "*Expensive* but absolutely needed for quality of life in today's society."
> COLLEGE STUDENT, FEMALE, AGE 32

Community colleges fared the best. Half of parents who are helping to or plan to help pay for their child's education feel the cost and value for an in-state community college education are fairly aligned; 41% of college students who are funding their college education share this same view.

Online-only universities rated about as well as four-year, public in-state institutions; 19% of parents and 24% of college students believe the cost and value trade-off are in alignment.

Why do parents and students continue to fund or borrow to pursue college educations when the cost/value imbalance is so great? Many parents and students indicated that while costs are clearly out of balance, value remains. Forty-three percent (43%) of parents and 39% of college students who fund college expenses see a four-year, in-state public education as expensive, but worth the investment. Private education did not fare as well; 29% of parents and 26% of college students who fund college expenses indicated that while they believe that private education is expensive, it is still valued as a worthy investment.

"An over-priced necessity" would be a good summary of funders' views.

This economic imbalance creates opportunity and incentive for innovators to develop new offerings and less-expensive alternatives.

Making a Choice – College Decision Criteria

Given the financial investments required, how are potential students and parents deciding which institutions to evaluate and eventually attend?

Parents and students were asked to rate the importance of factors that were considered when making a college selection. Respondents evaluated a set of factors ranging from academic reputation, affordability, areas of study available and financial support available, to legacy or tradition, library access, on-campus experience, sports programs, etc.

Three-quarters of parents and students indicated that six factors were the most important to their evaluation: areas of study available, affordability, academic reputation, degrees offered, financial support available and length of time to get a degree.

Access to the physical library and to online library resources were both important to the majority of parents and students.

AFFORDABILITY, AREAS OF STUDY, REPUTATION

· · · · · · · · · · · · · · · ·

Considerations when choosing a college

Very important or important ratings

	PARENTS	COLLEGE STUDENTS	HIGH SCHOOL STUDENTS
AREAS OF STUDY AVAILABLE	87%	77%	83%
AFFORDABILITY	84%	79%	86%
ACADEMIC REPUTATION OF THE SCHOOL	84%	71%	78%
LEVEL OF DEGREES OFFERED	80%	74%	80%
FINANCIAL SUPPORT	78%	75%	81%
LENGTH OF TIME TO GET A DEGREE	69%	72%	72%
ACCESS TO A PHYSICAL LIBRARY ON CAMPUS	65%	60%	59%
ON-CAMPUS EXPERIENCE	60%	52%	70%
ACCESS TO LIBRARY RESOURCES ONLINE	56%	55%	57%
ABILITY TO LIVE AT HOME	44%	58%	35%
OPTION TO TAKE CLASSES ONLINE	35%	44%	27%
ABILITY TO PARTICIPATE IN A SPORTS PROGRAM	26%	30%	24%
LEGACY OR TRADITION	24%	29%	17%

Respondents were asked to rate the importance of each factor when deciding on which college to attend.

OCLC

Because many factors weigh into the evaluation and selection of higher education options, respondents were asked an open-ended question to identify their single most influential factor.

Across all respondent groups—parents, college students and high school students—**affordability was identified as the most influential factor in school selection**.

The degree programs offered, location/proximity to home and quality were also ranked highly.

The majority of parents and students identified the on-campus experience as an important evaluation criterion, but when evaluated against other considerations, it was not a top decision criterion.

AFFORDABILITY IS MOST INFLUENTIAL

For evaluating or selecting a college

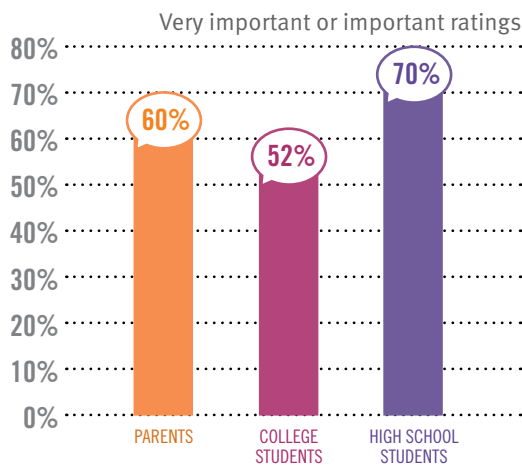|	PARENTS	COLLEGE STUDENTS	HIGH SCHOOL STUDENTS
AFFORDABILITY	28%	32%	34%
DEGREES/PROGRAMS/COURSES OFFERED	25%	21%	27%
LOCATION/PROXIMITY TO HOME	18%	25%	15%
QUALITY OF THE EDUCATION	15%	13%	14%
REPUTATION/RANKING/PRESTIGE	10%	7%	8%
THE RIGHT FIT	8%	2%	3%
ON-CAMPUS EXPERIENCE	5%	6%	12%

Coded responses from an open-ended question, "What was the most influential factor when deciding which college to attend?"

Weighing the On-campus or Online Experience

Living on campus, living at home and commuting, learning online—these are all options for students and parents to consider. The majority, 60% of parents, 52% of college students and 70% of high school students indicated that having an on-campus experience is an important evaluation criterion in deciding on a college. The desire for "a full experience" was mentioned fairly frequently by parents and students, particularly high school students, in deciding what college to attend. But as noted earlier, affordability— not an on-campus experience—topped the list as the deciding factor.

AN ON-CAMPUS EXPERIENCE MATTERS

Very important or important ratings

60%	**52%**	**70%**
PARENTS	COLLEGE STUDENTS	HIGH SCHOOL STUDENTS

"I want my child to experience *the total life experience* offered."

FATHER OF A HIGH SCHOOL STUDENT, AGE 44

"*Both on-campus classes and online classes are equal.* If you're motivated, you can learn either way."

COLLEGE STUDENT, FEMALE, AGE 21

"Education is very important, but I will also want to *live the college experience* with all different types of electives, sports, clubs and activities that can make my experience more memorable and fun."

HIGH SCHOOL STUDENT, FEMALE, AGE 17

How does on-campus or online factor into the college evaluation? The desire for an on-campus experience was the primary reason that parents and students indicated for not evaluating an online-only university. Three-fourths (76%) of high school students, two-thirds (67%) of parents and more than half (56%) of current college students who took the survey said an online-only option was not evaluated primarily because of the desire for an on-campus experience.
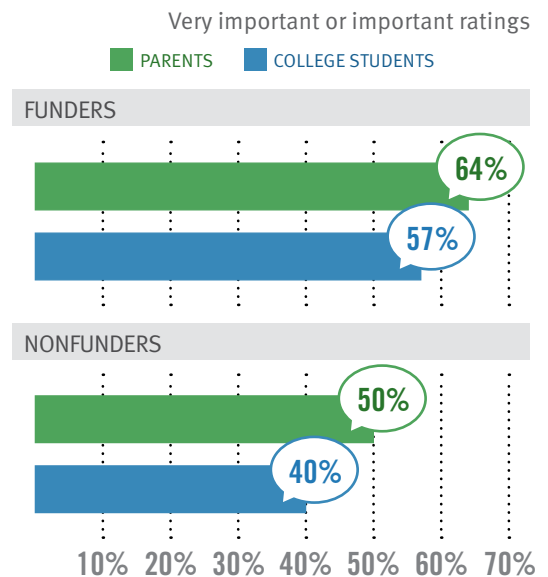
WHY NOT AN ONLINE-ONLY SCHOOL?

The on-campus experience

67% PARENTS

56% COLLEGE STUDENTS

76% HIGH SCHOOL STUDENTS

BELIEVE AN ON-CAMPUS EXPERIENCE IS ESSENTIAL
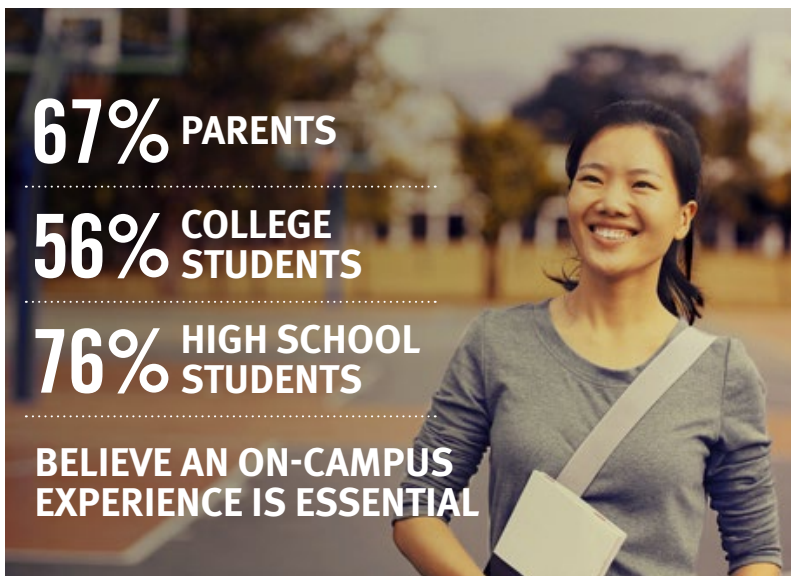
Base: Did not consider an online-only university.

AN ON-CAMPUS EXPERIENCE MATTERS MORE AMONG FUNDERS

Parents and college students who are assisting with funding are more likely to feel an on-campus experience is important than those not providing financial support.

Very important or important ratings

■ PARENTS ■ COLLEGE STUDENTS

FUNDERS
- **64%**
- **57%**

NONFUNDERS
- **50%**
- **40%**

10% 20% 30% 40% 50% 60% 70%

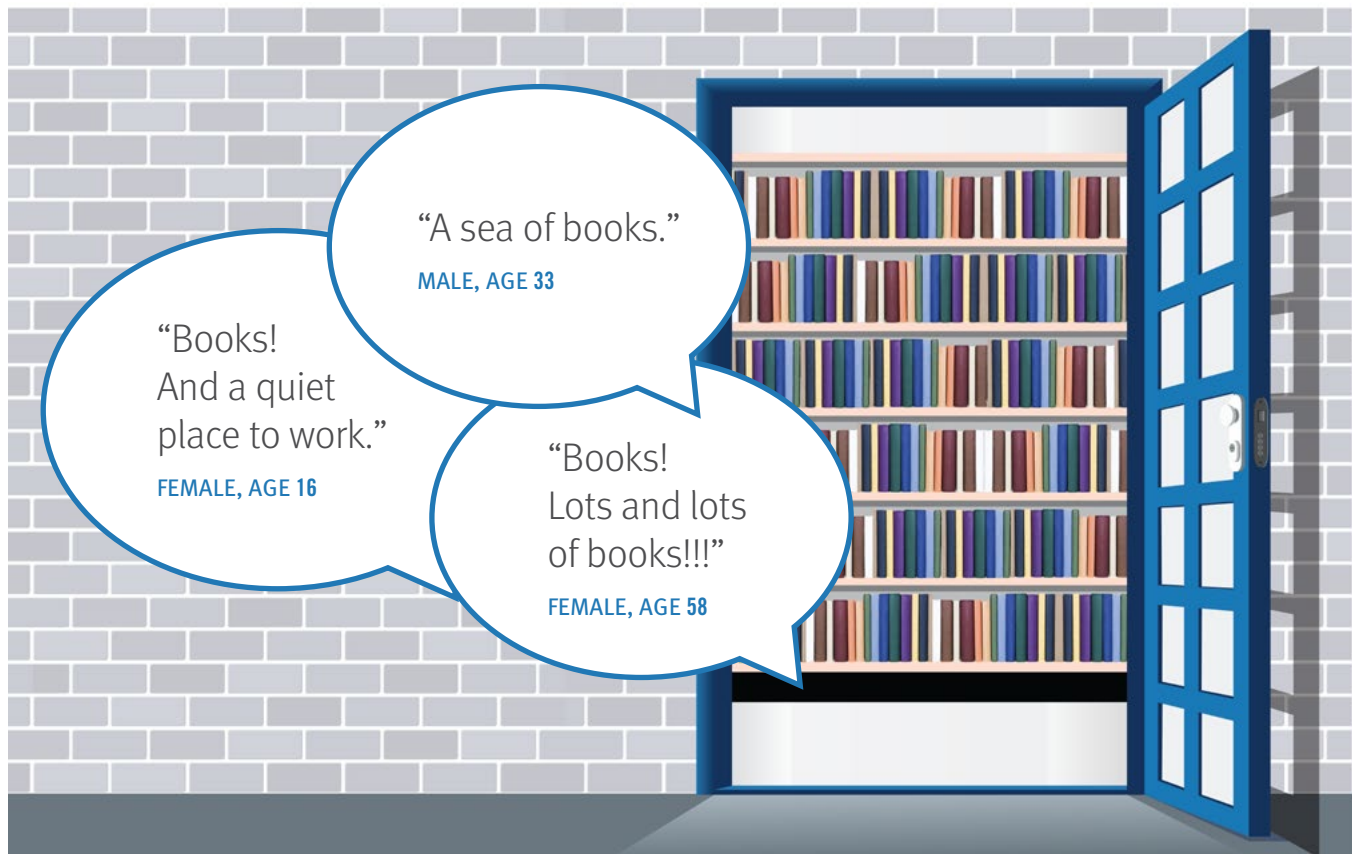**Note:** There were too few high school students who are not planning to fund at least part of their college education in order to include them in this chart.

Parent and student perceptions of a college education today—cost, choices and perceived value—were provided in this chapter. The perceptions of libraries and the beliefs about the on-campus experience are explored in Chapters Three and Four.

CHAPTER THREE

Libraries: The Brand

"A sea of books."
MALE, AGE 33

"Books! And a quiet place to work."
FEMALE, AGE 16

"Books! Lots and lots of books!!!"
FEMALE, AGE 58

As information consumers become online education consumers, rethinking higher education approaches and adapting new life-based learning habits, how will they view, and use, the library? What will be the success drivers or the early markers of trouble ahead?

Library relevance will be determined by two factors:

- Perceptions of the library brand, and

- The consumer's next library encounter

...in that order.

IN THIS CHAPTER:

- The library brand is "books" ... still

- Nostalgia for the library is slipping

- Love does not matter in the battle of brands

- Context matters

The Library Brand

OCLC researchers have been tracking the perceptions of libraries and the evolution of the library brand through surveys, focus group discussions, observations and marketing campaign analyses for a decade.

OCLC's first library perceptions survey was conducted in 2005, when Google was first expanding its offerings beyond a simple search engine. This study was completed in January 2014, as Google was becoming the most valuable brand in the world (Gross, May 21, 2014).

Alongside these international surveys of library users and non-users, our researchers have analyzed other contemporary studies and collected quantitative and qualitative information from library users, elected officials, college faculty, college alumni, college parents and 'the person on the street.' Evaluation of local marketing and advocacy campaigns and pilots and conversations with librarians have all contributed to a body of knowledge about the library brand perception.

The aim of all of this latest review: to take another snapshot and assess how the library brand is moving libraries forward, or holding back progress.

GOT LIBRARIES?

During casual conversation in airports, in lines at the grocery store, at the post office and at parties over the last decade, we have been asking people, *"Have you been to your library lately?"*

Overwhelmingly, libraries are loved and revered but also viewed as losing relevance.

I have to admit that I haven't gone in awhile. I don't have a need—but [quick to add] my neighbor [friend, someone else] goes and she really likes it.

I studied in the library in college. I slept there too.

I go there to do my homework.

They just built a new library in town. Very beautiful!

No and it really is a shame that people aren't using libraries that much anymore.

You say library use is up?—Really? That's surprising!

Yes—I still check out the books, but I am ashamed to say, I now buy most of my books. It is so convenient now. But I love the library.

I wonder what is going to happen to libraries with all of the books being online now.

Libraries are great for children—my children are grown now.

I remember going all the time as a child. Loved it!

Libraries = Books

Our 2014 research tells us that the library brand remains firmly grounded as the "book" brand.

In fact, from 2005 to 2014, the perception of the book brand has cemented. Sixty-nine percent (69%) of online users indicated that their first thought of a library was "books" in 2005, 75% in both 2010 and 2014. Even as most consumers have moved online for much of their information needs, they continue to strongly associate libraries with the physical—books and buildings.

What is the first thing you think of when you think of a library?

The more that the digital information landscape expands with alternatives to physical materials, the more solidified the library brand becomes as "books." Even as academic and public libraries dramatically increased spending on electronic resources by 370% and 163%, respectively, from 2002 to 2012 (NCES/IMLS data, 2012), mindshare did not shift. The significant investment in electronic content and online services have not moved brand perceptions beyond the book.

LIBRARIES = BOOKS, INFORMATION, BUILDING, READING

	TOTAL RESPONDENTS	AGE 16–24	AGE 25–35	AGE 36–50	AGE 51–59	AGE 60+
BOOKS	75%	70%	80%	79%	74%	75%
INFORMATION	12%	18%	9%	8%	11%	8%
BUILDING (ENVIRONMENT)	6%	8%	5%	5%	4%	6%
READING	3%	2%	2%	3%	4%	4%

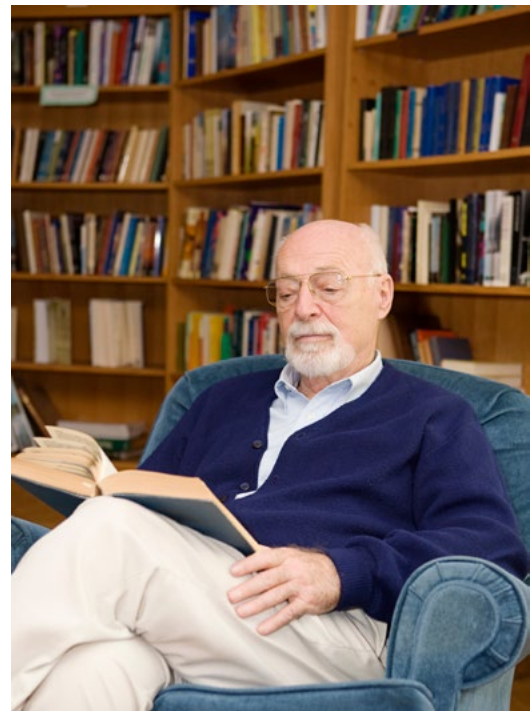What is the first thing you think of when you think of a library?

Library Nostalgia Shifting

Our 2014 research illuminated that the emotional attachment to libraries is changing. An examination of individual brand perception comments of thousands of responses between 2005 to 2014 shows some marked differences in attitudes today.
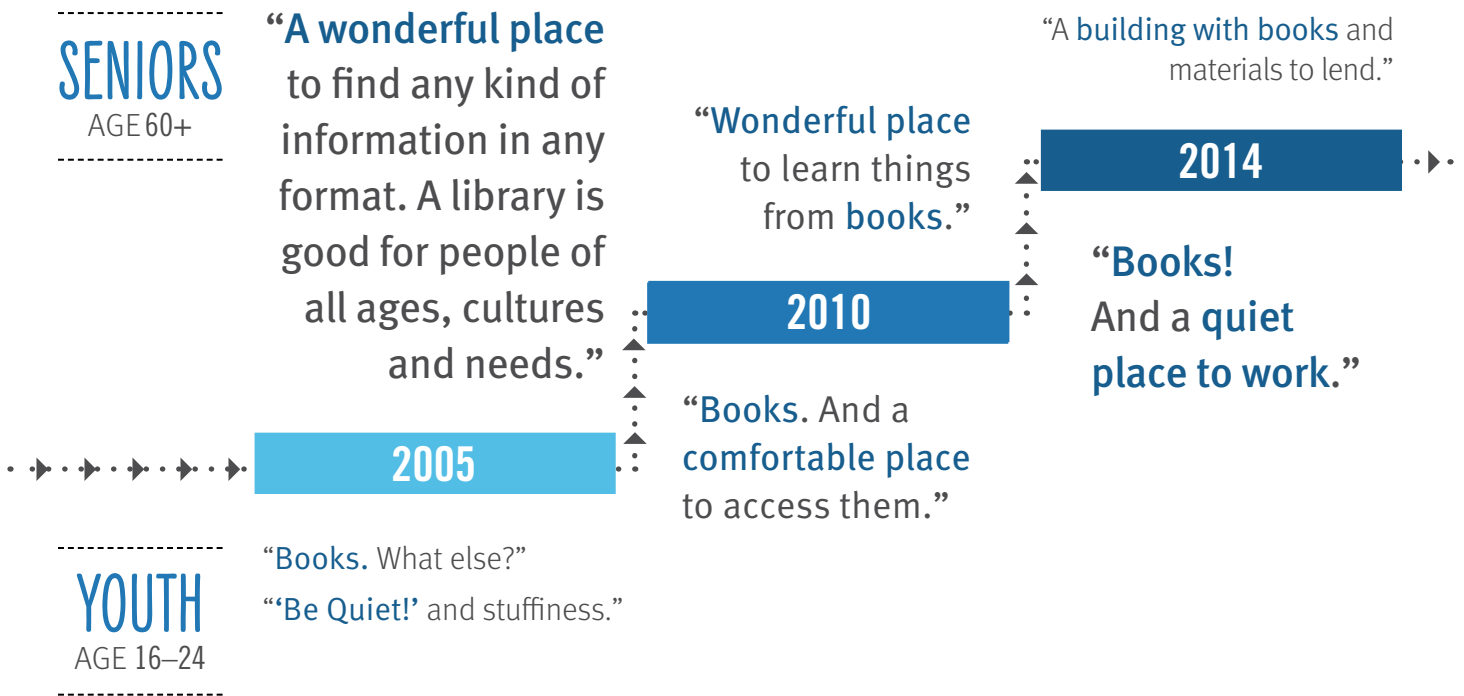
In 2005 when asked, "What is the first thing you think of when you think of the library?" the dominant response of all age groups was "books." A detailed review of the texture of the specific language respondents used to express their views identified some stark emotional differences across age groups. Many responses of those age 16 to 24, could be grouped into two perception categories—just books or comments containing books and negative attitudes about the library. Responses ranged from the single word "books" to more editorial comments such as "dirty, old books you can get from other sources" or "how quiet and boring it is." In 2010, we saw only slight movement in the spectrum of answers of the youth, e.g., "I imagine rows and rows of books" and "a big, cold building."

But our 2014 study shows some interesting shifts. While "books" continues to dominate, editorial comments have shifted. The more negative comments have decreased as youth showed neutral to slightly more positive tones: "A place of comfort and acceptance. A great place to sit and read a book."

The brand emotion for seniors (age 60+) also showed signs of migrating themes. In 2005, seniors used rich, nostalgic editorial comments to express their perceptions of the library. "Friend! The library has been my best friend since I was five years old—long time ago!" or "All those books, and so little time!" or "A wonderful place to find any kind of information in any format." Comments shared were less rich by 2010, e.g., "mass amount of books." In this most recent study, that trend continued. Senior expressions were much more likely to simply include the word "books" with less editorializing and less warmth. Library nostalgia for seniors is fading.

YOUTH AND SENIORS: CONVERGING SENTIMENTS

SENIORS
AGE 60+

"**A wonderful place** to find any kind of information in any format. A library is good for people of all ages, cultures and needs."

"**Wonderful place** to learn things from **books**."

"A **building with books** and materials to lend."

2014

2010

"**Books!** And a **quiet place to work**."

2005

"**Books.** And a **comfortable place** to access them."

"**Books.** What else?"

YOUTH
AGE 16–24

"'**Be Quiet!**' and stuffiness."

A "settling" of the brand emotion across age groups has occurred. No longer as romantic for seniors, and not as stodgy for the youth.

For college students, the specific language used to express their brand perceptions of the library also showed movement. Top-of-mind perception of the library for college students remains "books," but the comments added a new emphasis on library space. "Book Heaven!" or "Books. I love all the books!" were expressions shared in 2005. In 2010, the inclusion of place, "a building with a lot of books," became more frequent. By 2014, college students more often expressed the library as a place—a place to find books and also a quiet, peaceful place to get work done. "A place where you can get books, or do work on the computers." "A quiet place to study up for major exams." "A place where you can go to check out books, do research, study and read."

The library brand remains books. But a door may be opening to make a move.

My Most Recent Library Experience

Our brand perceptions are either reinforced or challenged by our most recent experience with a brand.

For most information consumers, their most recent library experience is a visit to a physical library. The percentage of Americans who visit a public library in-person annually (63%) continues to significantly outpace the percent who visit a public library website (48%). The same holds true for college students (78% and 67%, respectively). Also consistent with our 2005 and 2010 studies, the majority of college students in 2014 use several types of libraries, and 35% of them indicate that the public library is their primary library.

For most consumers, therefore, their most recent library encounter is a visit to a physical building stocked with physical materials. While the library resources available at a physical library location go far beyond the book, the visual cues reinforce the brand image.

How concerned should we be about the library brand? The answer must be tied to how significantly we believe the **context** in which libraries will operate in the future will change.

Brands are not impressions held in isolation. Brands are attitudes informed and shaped by the context in which they operate. Shifting needs shift brands—often faster than any change in the brand product itself.

For guidance with how to evaluate library brand positioning in a dynamic digital landscape, we can look to the insights provided by the work of branding expert David Allen Aaker.

Context

*"Always design a thing by considering it in its next larger **context**—a chair in a room, a room in a house, a house in its environment, an environment in a city plan."*

—Frank Lloyd Wright

Brand strategist David Allen Aaker has written books, articles and blog posts on brand building, brand strategy and brand evolution. Aaker asserts that brands that thrive over time, across changing landscapes and amid shifting user attitudes, have certain identifiable characteristics. Strong, enduring brands:

> **Adapt** to market dynamics

> Are continuously **energized** to remain **vibrant**

> Remain **relevant** by creating and promoting clear **differentiators that match the consumer needs** while retaining congruency with the expectations of the brand.

In his book, *Brand Portfolio Strategy*, Aaker warns organizations about an all-too-frequent problem encountered by the very strongest brands. A strong brand, when tested, often remains very consistent and solid over time (think libraries = books).

Because market tracking studies often show that the brand continues to have a high level of trust, esteem, perceived quality and perhaps even perceived innovation, observers interpret the data to mean that the brand remains **relevant**. This may or may not be the case.

An organization's own research data often does not adequately incorporate non-organization-specific data, such as changing market realities or shifting user behaviors. Organizations can miss critical cues, factors independent of brand loyalty or organizational trust. A strong, trusted, loved brand can falter, not because the brand has become weaker, but rather because the brand category has lost relevance.

Even the strongest brands will falter if the product category (think books) with which the brand is associated is believed to be fading, or if that category is being augmented by another product category (think e-books). The brand loses relevance through no fault of its own, but rather by category association. It is not the strength or weakness of a brand's offerings that decrease the perceived value of the brand. It is the perception of the need most associated with the brand.

This reality is impacting library relevance. While libraries continue to add electronic content and online services, library brand perception is not benefiting from this work. The library brand is too strongly associated with books, a category that both library users and non-users perceive to be less relevant with the rise of the Web, mobile information and e-books.

We clearly see evidence of a brand that is loved. In OCLC studies, as well as the recent Pew Research Center study, *How Americans Value Public Libraries in Their Communities*, libraries are a loved and trusted brand. Appreciation of libraries remains at the top of the charts (e.g., 80% say that books and media are very important services that public libraries offer). But the cues are there. In the same study, public libraries do not rate well in terms of relevancy. Over half (52%) say that people do not need public libraries as much as they used to (Zickhuhr et al., 2013). Love is steady, but relevancy is slipping and nostalgia is fading.

How do libraries remain both valued—and relevant?

Aaker asserts that organizations often incorrectly assume that the only challenge for the brand is to win against other alternatives in their current category. Leaders must also evaluate the question, "What is the product category that I need to operate in today?"

WHAT IS RELEVANCE?

Brand or product relevance occurs when two conditions are met:

1. There is a **perceived need** or **desire** by the customer for **a product category**.

2. The **brand** is among those **considered** by the customer to be **relevant in that category**.

—David Allen Aaker, *Brand Portfolio Strategy*

Relevance in a changing landscape requires that an organization's product attributes and perceived benefits are aimed at a category that the consumer sees as relevant.

Differentiation in an irrelevant category is not very worthwhile. The ultimate strategic tragedy, according to Aaker, is to achieve brilliance in creating differentiation (quality, price, loyalty), only to find that you are in a product category that is no longer relevant.

So, what does this mean for the library? What will be the relevant product categories for online learners, college students and other users of the library? How does the library *fit* or not, into these new learning product categories?

The perceptions of libraries and the shifting emotions around the library brand were explored in Chapter Three. Before tackling the question of how to build library brand relevancy, Chapter Four will provide important data about how users perceive libraries in the physical campus learning setting and how online users are currently using the library to support their learning goals.

Perceptions: Campus Life and Libraries

> " … Education is very important, but I will also want to **live the college experience** with all different types of electives, sports, clubs and activities that can make my experience more memorable and fun."
>
> HIGH SCHOOL STUDENT, MALE, AGE 17

> "Gaining **a full learning experience** isn't possible without a physical experience for me."
>
> FEMALE, AGE 45
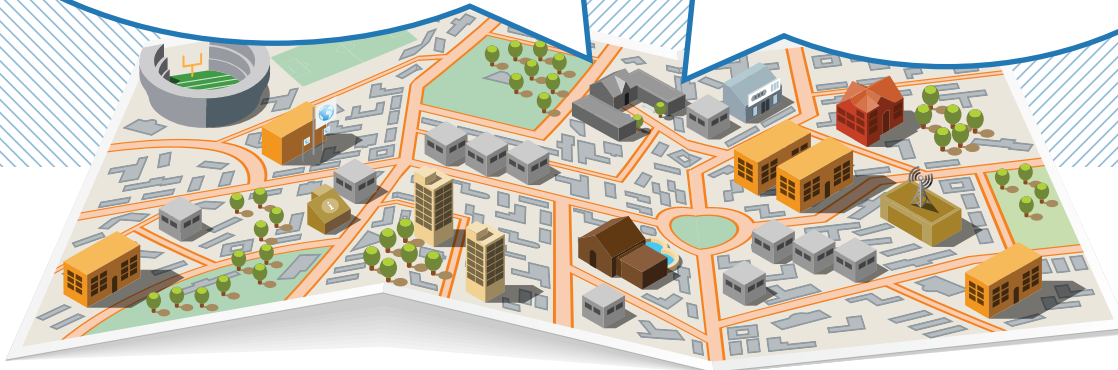
The on-campus experience is an important consideration in a college education evaluation and selection process.

Many things go into making a college campus experience—from dorm life, to classrooms, student centers, sporting events and the library. Understanding the unique, distinctive role the campus library serves provides important strategic insight.

Understanding how those unique roles translate, or not, to online education is essential.

IN THIS CHAPTER:

- Perceptions of the on-campus college experience

- The distinctive roles of the library

- What is not so distinctive about the library

- When the on-campus library moves online

- What online learners want

Perceptions of Campus Life

The college experience is a multidimensional, highly structured, yet for many, uniquely personal experience. College campuses are organized, interconnected ecosystems of services, gathering spaces, people and facilities that are designed to foster holistic student learning and personal growth.

The college campus experience has evolved over hundreds of years of tradition and innovation. How do today's education consumers view the college life experience? What are their perceptions of the various elements—the services and programs—that go into the making of the college campus experience? How do they view the role of the campus library? How is the role of the library—or *is* the role of the library—differentiated from the overall education experience? Understanding the perceptions, interdependencies and distinctions among the various elements of the college education experience could provide powerful strategic planning tools for library leaders as the new age of online learning gathers steam.

We found no studies that offered the important perceptions data needed to understand the interdependencies and distinctive value of the campus library. So, in partnership with the University of Kansas Libraries and the Baker Library at the Harvard Business School, we developed a study to help find some answers. The study explores the perceptions of two groups of education customers—parents with a child or children enrolled in a four-year university or college, and alumni who had graduated from a four-year university or college.

While no two campuses are the same—each is unique in style, architecture, services and setting—most campuses contain common elements. They have faculty, classrooms, libraries, student unions, sports arenas, alumni programs, career centers, etc. Each element has a role in the overall education experience; the study provided a better understanding of the perceptions, interdependencies and distinctive roles of these elements.
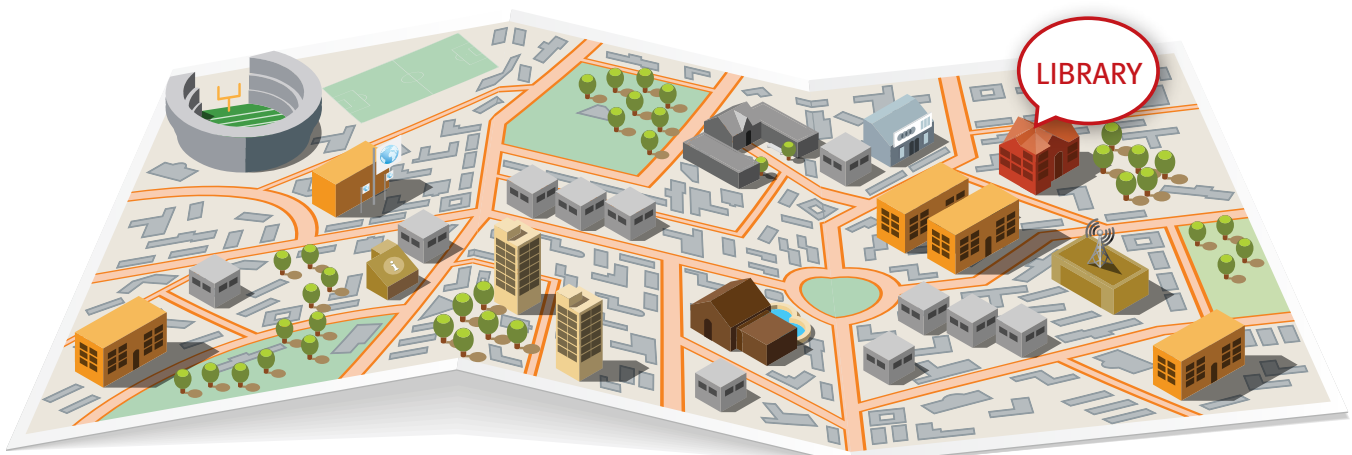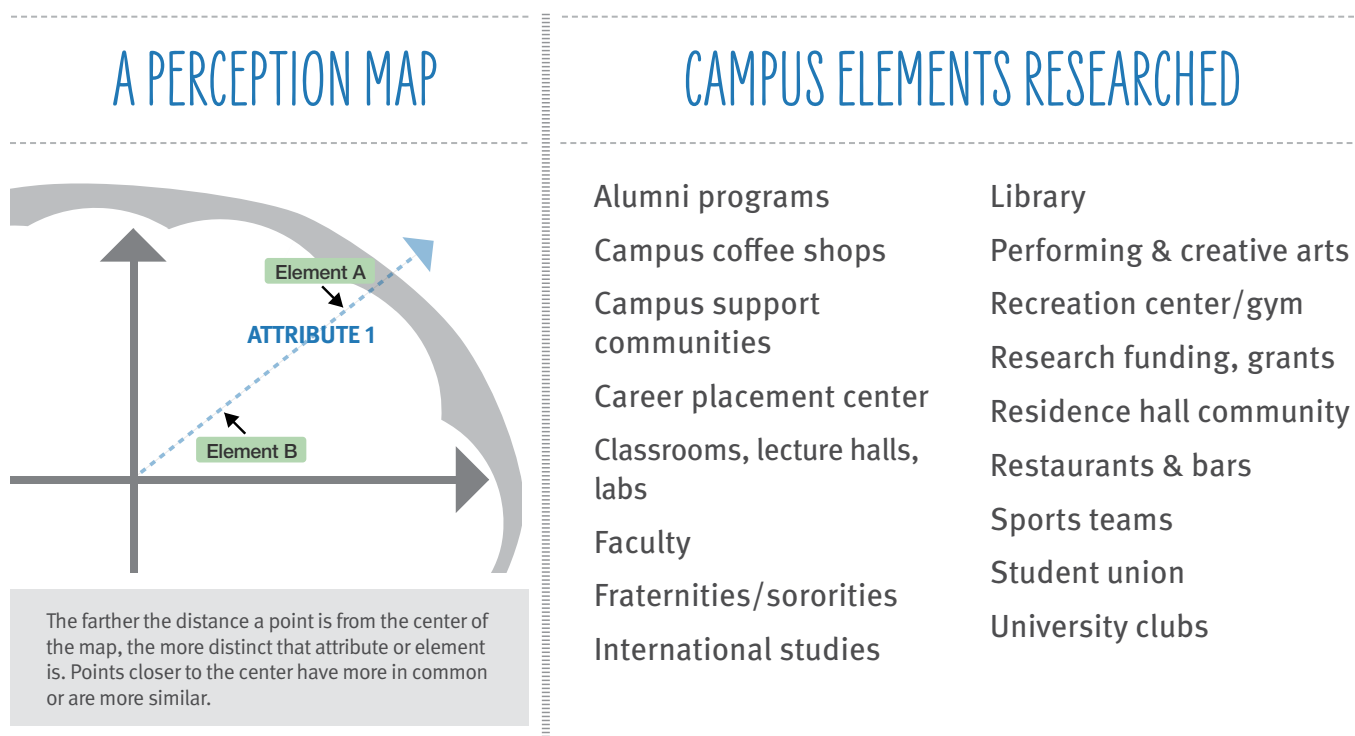
The study was fielded with a research partner, glass box research company, using an independent online research panel from Research Now. Parents and alumni were asked to evaluate a subset of 17 campus elements—services and facilities (elements) that are common across most campuses—against 60 different attributes (e.g., is convenient, offers access to latest technology, builds character, etc.), indicating the degree to which the attributes describe each element. The results were analyzed using correspondence analysis mapping to understand the emotional and functional dimensionality of the elements tested. Because some campus elements that are more popular or well-known tend to score higher overall, perceptual mapping allows researchers to rank not popularity, but rather distinctions, to better understand which attributes best describe each of the campus elements.

The location of the elements and attributes on the map is meaningful. The distance from the center of the map indicates how distinct a point is. The larger the distance a point is from the center of the map, the more distinct that attribute or element is. Points closer to the center have more in common or are more similar.

For example, in the sample perception map provided below, Element A (farther from the map's center) is more distinct than Element B. Element A is more associated with Attribute 1 because it is plotted farther along Attribute 1's attribute line (the blue dotted line).

The placement of the 17 campus elements and 60 attributes on the Campus Perception Map was generated using a correspondence analysis technique. There were no preconceived outcomes or suggested grid placements of any elements or attributes prior to the research outcomes.

A PERCEPTION MAP

The farther the distance a point is from the center of the map, the more distinct that attribute or element is. Points closer to the center have more in common or are more similar.

CAMPUS ELEMENTS RESEARCHED

Alumni programs

Campus coffee shops

Campus support communities

Career placement center

Classrooms, lecture halls, labs

Faculty

Fraternities/sororities

International studies

Library

Performing & creative arts

Recreation center/gym

Research funding, grants

Residence hall community

Restaurants & bars

Sports teams

Student union

University clubs

CAMPUS PERCEPTION MAP

THE INDIVIDUAL

Campus coffee shops
Convenient
Group space
Important to everyday lives
Safe haven
Indispensable
Rely on

Get work done

Technology access
LIBRARY
Current, relevant information
Seeking truth
Center – where it all comes together
Assistance when struggling
Place to think philosophically
Latest technology

Restaurants & bars   Student union
Residence hall community
Student-to-student learning
Blow off steam
Rec center/gym
Balance

Guidance   Tools for information
Support & guidance Knowledge for all
Introspection   Grounds knowledge
Learn from the past
Safe to explore   Information generated by past generations
Interesting   Classrooms, lecture halls, labs Great thinking
Explore interests   Explore concepts

Connects parts of
campus together
Haven for passion
Campus support communities
"Heart" and "soul"

EXTRACURRICULAR

ACADEMIC

Find yourself
University clubs
Experience
foreign cultures
Performing & creative arts
Find your passion

Challenge traditional thinking Valuable intellectual
Career placement center   property
Experiment with new ideas
Broadens horizons   Faculty
Stimulates amazing ideas

Successful future
Faculty and students work together

Fraternities/
sororities

Timelessness & longevity
Builds character   Important to
prospective students
Build lifelong relationships   History of the
Builds self-confidence   university
Builds teamwork skills

School spirit
Sports teams
Buzz/notoriety

Greater good of humanity   Research funding, grants
Communicates reputation
Achieve dreams
Gives legitimacy
International studies   Status for recognition and credentials

Alumni programs
Legacy   Impacts status and rankings
Faculty status and recognition
Increases awareness of the university

THE ACADEMY

The Campus Perception Map helps us understand the perceptions, commonalities and distinctive brand characteristics of 17 campus elements, from the student union, to sports arenas, fraternities and sororities, and the library. The map can best be studied by dividing it into quarters and analyzing the unique characteristics of each quadrant in turn. For ease of reference, each of the four axis points has been labeled. The upper-half of the map represents those campus elements, and the associated attributes, most closely associated with individual student outcomes—"the individual" axis point. The lower half of the perception map is characterized by those campus elements and associated attributes that are more closely tied to the university, rather than to the student—"the academy" axis point.

Similarly, the map can be divided vertically. The left half of the map identifies elements and attributes that can be described as "extracurricular"; the right half of the map includes elements and attributes that are "academic."

Applying the methodology explained earlier, the farther an element is from the center of the map, the more distinctive it is. And, the farther along the attribute line an element is, the stronger the association between that element and that attribute. For example, "convenient" and "group space" attributes are the top associations with campus coffee shops. While other elements were also described as being convenient, convenience was more strongly associated with campus coffee shops than with any other element.

A review of the four quadrants reveals important perceptions, distinctions and associations about elements that make up the full range of the on-campus college experience.
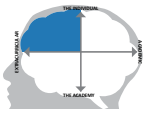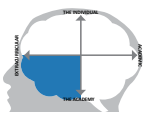
The Individual/Extracurricular Campus Experience

Elements in the upper left quadrant represent those campus services and facilities that provide extracurricular experiences. Campus coffee shops, student unions and recreation centers appear in this quadrant, as do area restaurants and bars, and the residence halls. The attributes the survey respondents most associated with these campus elements include places that are seen as an "important part of everyday life," "convenient," "indispensable," places to "blow off steam" and places where "student-to-student learning occurs."

Note that the campus coffee shop is farthest from the center of the map, and therefore, the most distinctive element in the quadrant. The student union is closer to the middle and shares commonalities with the restaurant and bars, and the residence hall.

The "indispensable" attribute is most associated with coffee shops (the element farther along the "indispensable" attribute line). Restaurants and bars, the student union and the residence hall all share similar associations with being "indispensable."

The Academy/Extracurricular Campus Experience

The lower left quadrant of the Campus Perception Map includes university clubs, performing and creative spaces, fraternities and sororities, and sports teams. These services are perceived as more group-focused, rather than designed for the individual student. They are also identified as university-sponsored. Services in this quadrant are often ones that create "notoriety and buzz" with the student body. The attributes include such items as "builds teamwork skills," helps students "find themselves," "find their passions" and "form relationships that will last a lifetime."

In this quadrant, the perceptions of the university sports teams are most distinctive. They are the campus element most associated with "school spirit."
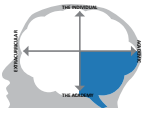
The Academy/Academic Campus Experience

University research and grants, international studies, alumni programs and faculty are found in the academic/academy quadrant. Respondents believe these elements of the campus experience are most closely associated with "university status," "rankings and reputation," "greater good of humanity" and "legacy."

This quadrant includes larger numbers of attributes that are not located near one specific element. Attributes such as "successful future," "impacts status and rankings" and "greater good of humanity" are associated with all campus elements in the quadrant but no specific element has a stronger association over the others.

The Individual/Academic Campus Experience

The upper right quadrant includes the campus elements that bring together individual and academic pursuits. This quadrant includes classrooms, labs, lecture halls, the career placement center and the library. This set of services is most strongly associated with attributes such as "grounds knowledge," "enables great thinking," "explores interests" and "current, relevant information."

Most of the elements in this quadrant are placed quite close to the center of the map or are bordering another quadrant. In such instances, these campus elements share attributes also associated with other quadrants, indicating that they are perceived as more broad-based, less unique services. The career placement center, for example, straddles the individual and academy axis and is associated with both "exploration" and "challenge traditional thinking."

The library, notably placed in the upper right corner of the map, is the most distinctive campus service in this quadrant. The next section explores the unique and shared perceptions of the campus library.

The Library's Territory on Campus

The library shares the individual/academic quadrant with other services, including classrooms and lecture halls, the career placement center and campus support communities, such as religious or ethnic groups.

Attributes that alumni and parents associate with this quadrant identify such beliefs as helping students "seek truth," "access latest technology," "support and guidance" and "provide a place to think philosophically." These perceptions are associated with the library but are also shared by other services.

Analysis revealed attributes that the library uniquely owns: the library is the place "to get work done," the library provides "access to technology tools to get work done," and the library provides "current, relevant and historical information."

Attributes most strongly associated with the campus library:

- Helping students **get work done**

- Providing access to **basic technology tools** to **get work done**

- Providing information: **current, relevant information** and **information** generated by **past generations.**
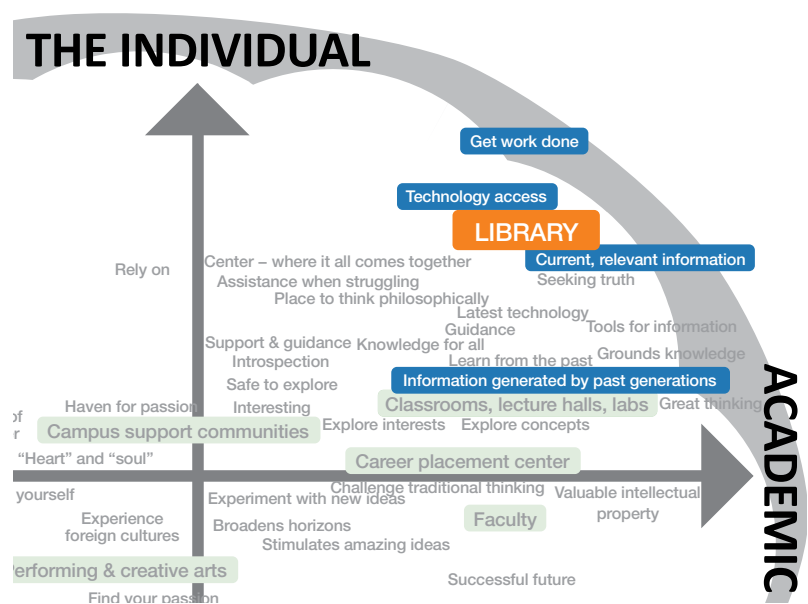
Alumni and parents of college students have clear, unique perceptions of the library's role in campus life. Understanding these beliefs, along with the attributes associated with the library that are not so unique, strengthens the ability to focus attention and resources on the library's most distinguishing assets. These library roles and perceptions are explored more fully in the next section of this chapter.

Libraries: the place and tools to get work done

The campus library's most unique attribute is that it is the place that helps students get work done. Of the 60 attributes studied in this research, the parents and alumni surveyed most strongly associate the library with "getting work done," with 83% agreeing that this attribute describes the library.

"Access to basic technology tools allowing students to get work done" is another distinctive attribute defining the campus library. Three-quarters (78%) of parents and alumni believe that the library is the place on campus that equips students with the tools they need.

While not as uniquely associated with the library, 74% of parents and alumni agree "providing a space for groups to meet and work together" describes the library.

Libraries provide information—current, relevant or historical

Providing relevant, timely and historical information is most strongly associated with the campus library. Just over three-quarters of respondents agree that "access to information generated by past generations" and "access to current, relevant and extensive information" describe their perceptions of the library.

Providing students with the support they need to "get work done" is a role distinct to the library, whether it is providing the space to work independently or as a group, or providing "access to the basic technology tools necessary to complete work," or providing "current, relevant or historical information."

CAMPUS LIBRARIES

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Get work done

83% Allows **students to get work done**

78% Gives **access to basic technology tools,** allowing students **to get work done**

74% Provides a space for groups **to meet** and **work together**

% agree attribute describes the library.

CAMPUS LIBRARIES

· · · · · · · · · · · · · · · ·

Information to get work done

79% Gives students the ability to **find information generated by past generations**

76% Provides the **best access to current, relevant and extensive information**

% agree attribute describes the library.

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Perceptions of the Campus Library

The library's unique perceived role as the place on campus to get work done and with the tools students need differentiates it from other campus services and programs. Understanding more about how those perceptions and other attributes about the library compare to other campus services provide additional insights.
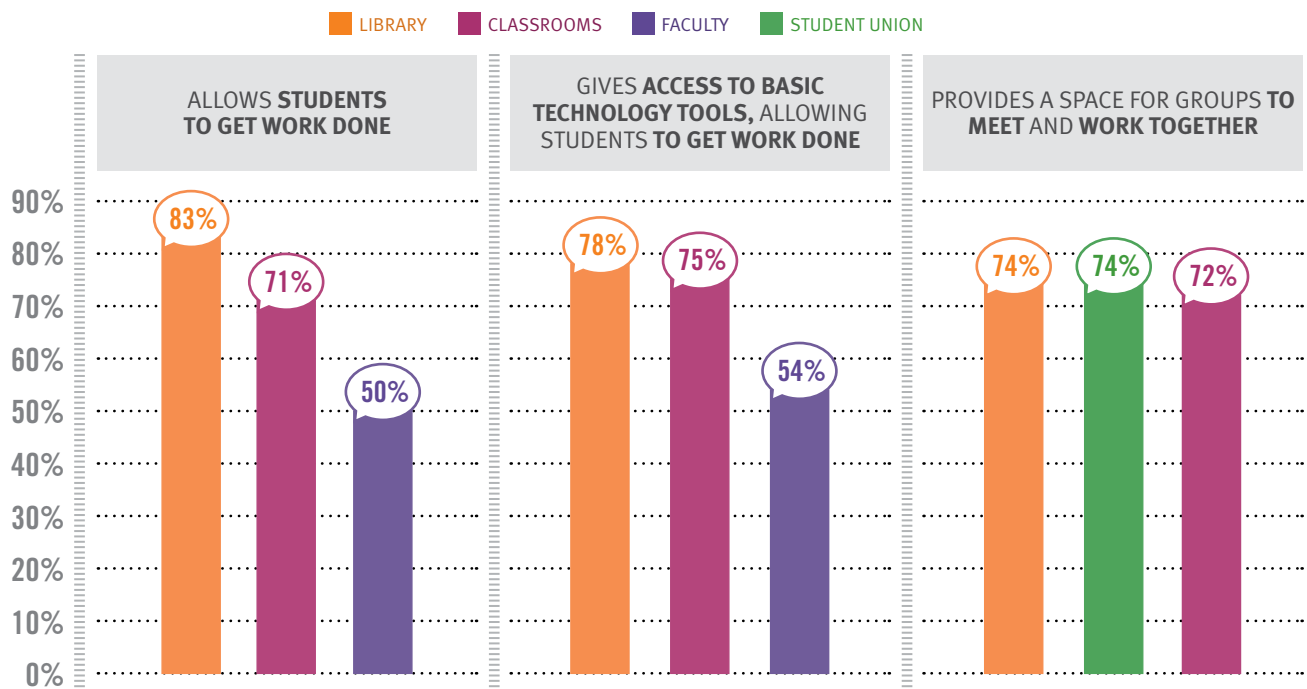
The following charts compare the library results to the perceptions of the other campus elements—classrooms, the student union, faculty and the campus support communities—that share similar attributes. The higher the percentage, the stronger the survey respondents' perceived association between an attribute and a given element.

Along with the library (83%), classrooms (71%) and faculty (50%) are also associated with "getting work done." "Access to basic technology allowing students to get work done" describe both the library (78%) and classrooms (75%). The next strongest association was with faculty (54%).

The library (74%) and the student union (74%) both share positions as the place to "meet and work as groups." Classrooms also rated highly (72%).

CAMPUS LIBRARIES

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Help students succeed

LIBRARY   CLASSROOMS   FACULTY   STUDENT UNION

ALLOWS STUDENTS TO GET WORK DONE
- 83%
- 71%
- 50%

GIVES ACCESS TO BASIC TECHNOLOGY TOOLS, ALLOWING STUDENTS TO GET WORK DONE
- 78%
- 75%
- 54%

PROVIDES A SPACE FOR GROUPS TO MEET AND WORK TOGETHER
- 74%
- 74%
- 72%

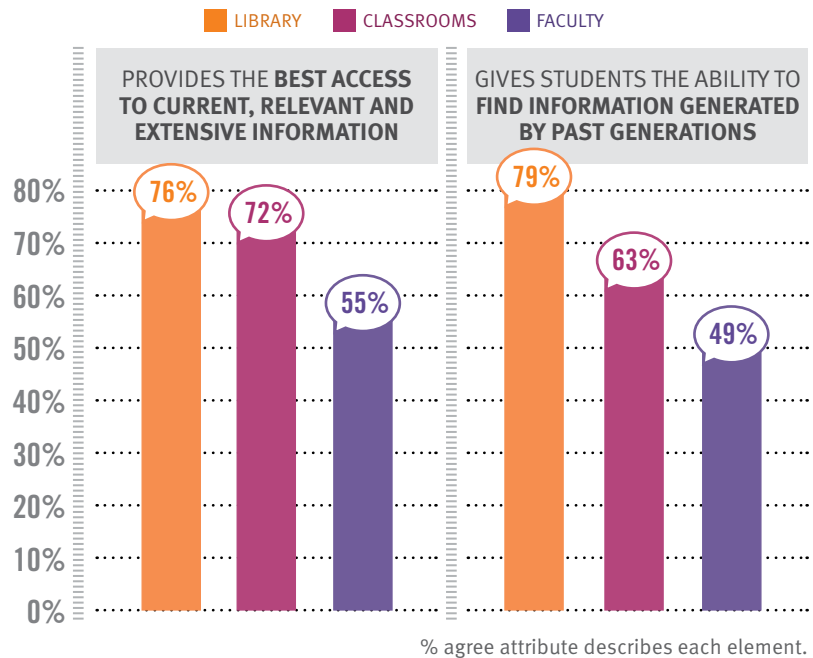% agree attribute describes each element.

The libraries and classrooms are the two campus elements most associated with providing students with information. Finding "information generated by past generations" is highly associated with the library (79%), as is providing students with the "best access to current, relevant and extensive information" (76%). Classrooms are also rated highly on this dimension of campus life.

A decade of research into the beliefs of the information consumer identifies one attitude that is very clear—convenience trumps almost every other service attribute. Libraries (74%) ranked well as a convenient on-campus service. Classrooms (70%) and student unions (65%) are also described as "convenient."

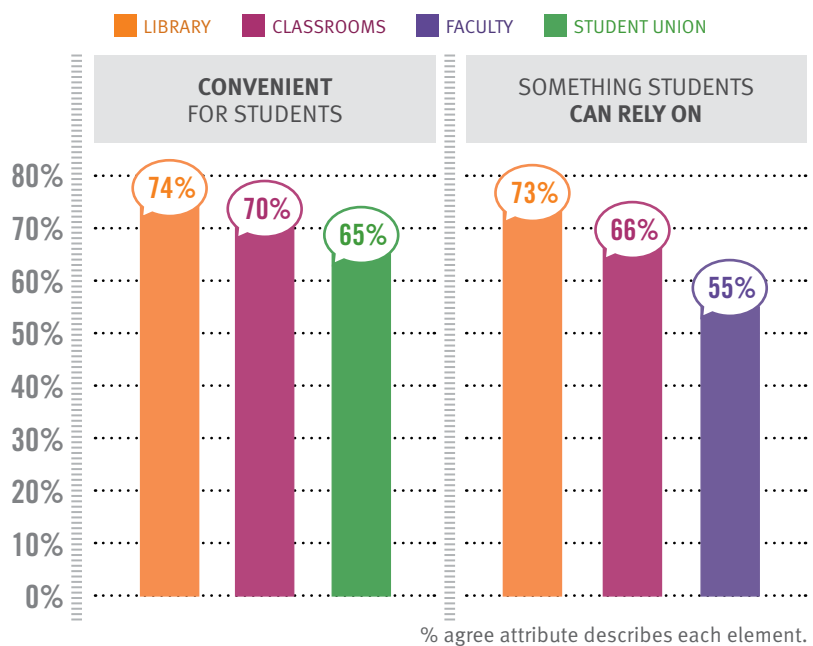Libraries also garnered the highest agreement scores for being "something students can rely on."

CAMPUS LIBRARIES

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Top information source

LIBRARY   CLASSROOMS   FACULTY

PROVIDES THE **BEST ACCESS TO CURRENT, RELEVANT AND EXTENSIVE INFORMATION**	GIVES STUDENTS THE ABILITY TO **FIND INFORMATION GENERATED BY PAST GENERATIONS**

Library: 76% Classrooms: 72% Faculty: 55%

Library: 79% Classrooms: 63% Faculty: 49%

% agree attribute describes each element.

CAMPUS LIBRARIES

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Convenient and reliable

LIBRARY   CLASSROOMS   FACULTY   STUDENT UNION

CONVENIENT FOR STUDENTS	SOMETHING STUDENTS **CAN RELY ON**

Library: 74% Classrooms: 70% Student Union: 65%

Library: 73% Classrooms: 66% Faculty: 55%

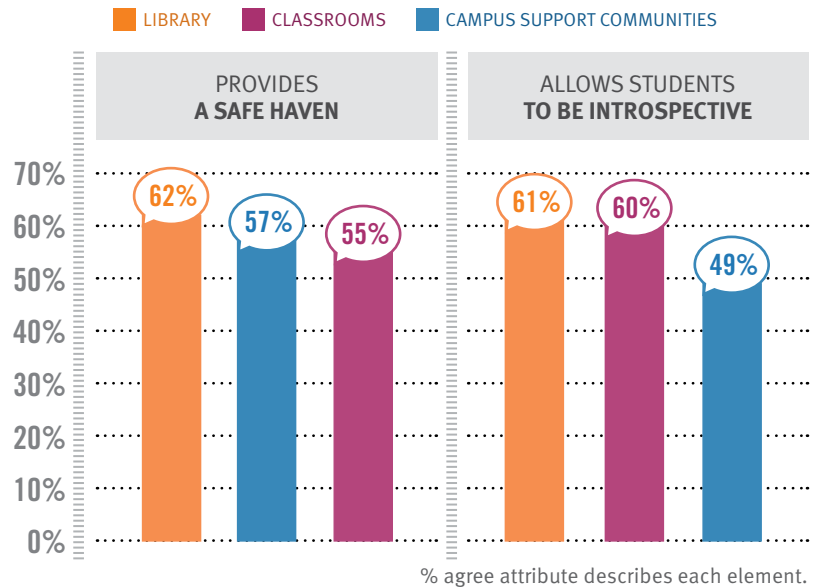% agree attribute describes each element.

Alumni and parents of college students also perceived libraries as being "a safe haven" for students (62% agree) and as a service that "allows students to be introspective" (61% agree).

The library, campus support communities (e.g., religious, ethnic or diversity groups) and classrooms all ranked well as places where students can feel safe and can explore and reflect.

CAMPUS LIBRARIES

A safe place for introspection

| LIBRARY | CLASSROOMS | CAMPUS SUPPORT COMMUNITIES |

PROVIDES A SAFE HAVEN
- 62%
- 57%
- 55%

ALLOWS STUDENTS TO BE INTROSPECTIVE
- 61%
- 60%
- 49%

% agree attribute describes each element.

The library is distinctly associated with providing the space, tools and information to get work done. Relative to other campus services tested, libraries are more strongly associated with being convenient and reliable, and a safe haven for students.

It is equally important to identify those attributes that are NOT so strongly associated with libraries. Some of the findings provide new insights that library leaders can use to focus or refocus messages and programming.
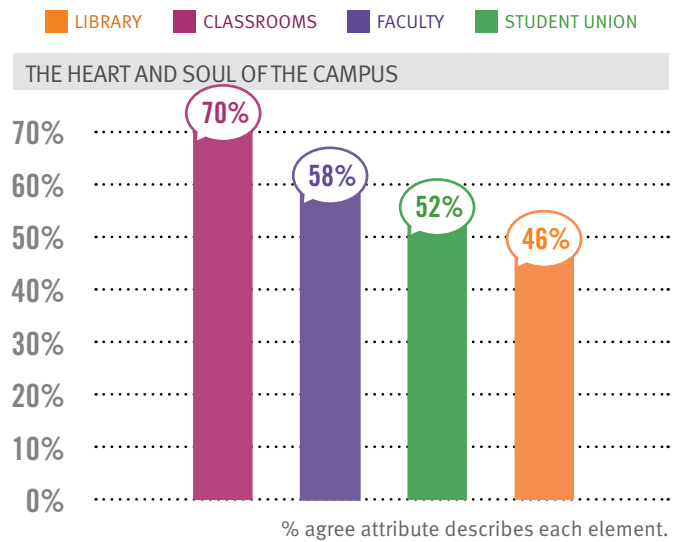
Library marketing literature and fund-raising campaigns often include language about the important role of the library as the "heart and soul" of the campus, yet this attribute is not seen as a distinctive attribute for any campus element tested. While the phrase "the library is the heart and soul of the campus" did resonate with some respondents, the majority of parents and alumni surveyed thought otherwise.
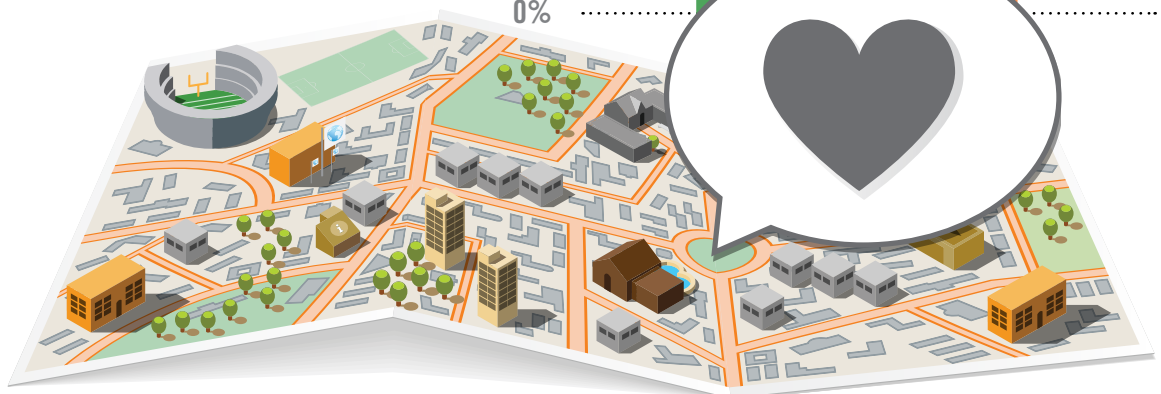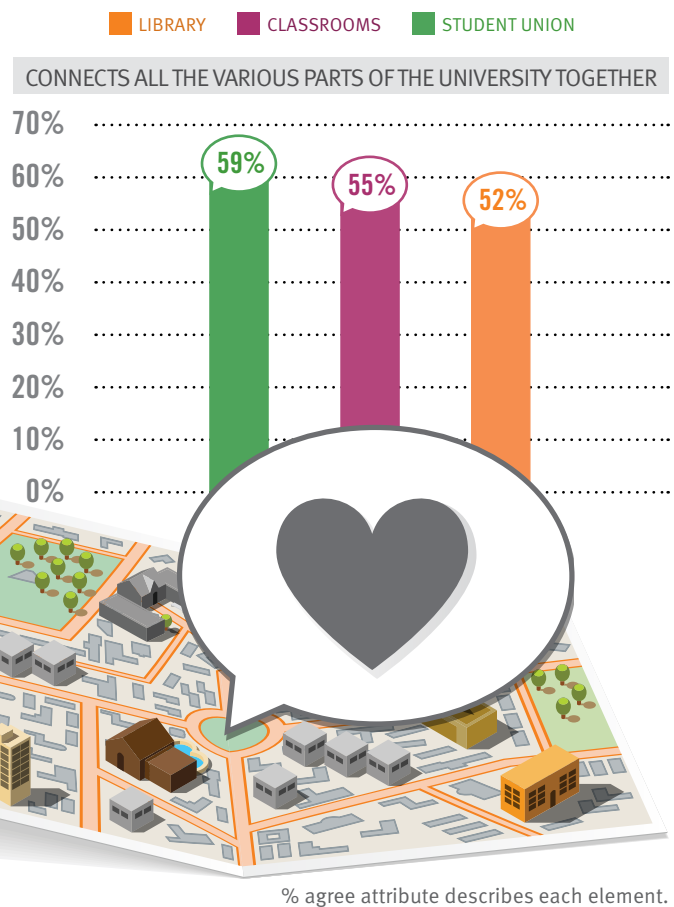
Just under half (46%) agree that the library is the heart and soul of the campus. Respondents perceive classrooms (70%) as the campus element most likely to be the heart and soul of the campus life, followed by faculty (58%) and the student union (52%).

Likewise, another attribute often promoted in library marketing materials is that the campus library is the space that "connects all of the campus together." The data suggest that no individual element is strongly associated with this perception. Slightly more than half of respondents agree the student union (59%), classrooms (55%) and the library (52%) are the services that they view as the campus connector.

CAMPUS HEART & SOUL

■ LIBRARY ■ CLASSROOMS ■ FACULTY ■ STUDENT UNION

THE HEART AND SOUL OF THE CAMPUS

70% — 70%
60% — 58%
50% — 52%
40% — 46%
30%
20%
10%
0%

% agree attribute describes each element.

CONNECTING THE CAMPUS TOGETHER

■ LIBRARY ■ CLASSROOMS ■ STUDENT UNION

CONNECTS ALL THE VARIOUS PARTS OF THE UNIVERSITY TOGETHER

70%
60% — 59%
50% — 55%   52%
40%
30%
20%
10%
0%

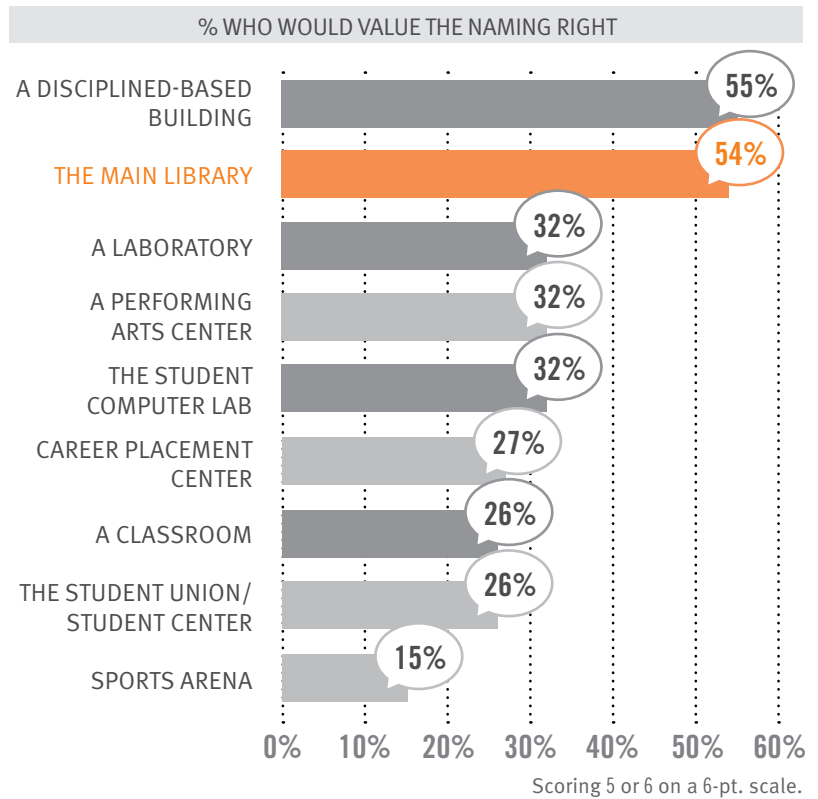% agree attribute describes each element.

The research provided evidence that alumni and parents see the library as an enduring and prestigious part of universities, and, if given an opportunity, would value associating their name with the campus library building.

Parents and alumni were presented with a list of 15 campus locations and were asked to respond to the following question: *"Imagine that a substantial gift was made in your name. You have been given the opportunity to have a building or location on campus named in your honor or your student's honor. How interested would you be to have a campus building named after you or your student?"*

Two places rose to the top: a discipline-based building and the library. Student unions, performing arts centers and sports arenas all were of interest, but in far lower percentages.

NAME IT AFTER ME

% WHO WOULD VALUE THE NAMING RIGHT

Location	%
A DISCIPLINED-BASED BUILDING	55%
THE MAIN LIBRARY	54%
A LABORATORY	32%
A PERFORMING ARTS CENTER	32%
THE STUDENT COMPUTER LAB	32%
CAREER PLACEMENT CENTER	27%
A CLASSROOM	26%
THE STUDENT UNION/ STUDENT CENTER	26%
SPORTS ARENA	15%

Scoring 5 or 6 on a 6-pt. scale.

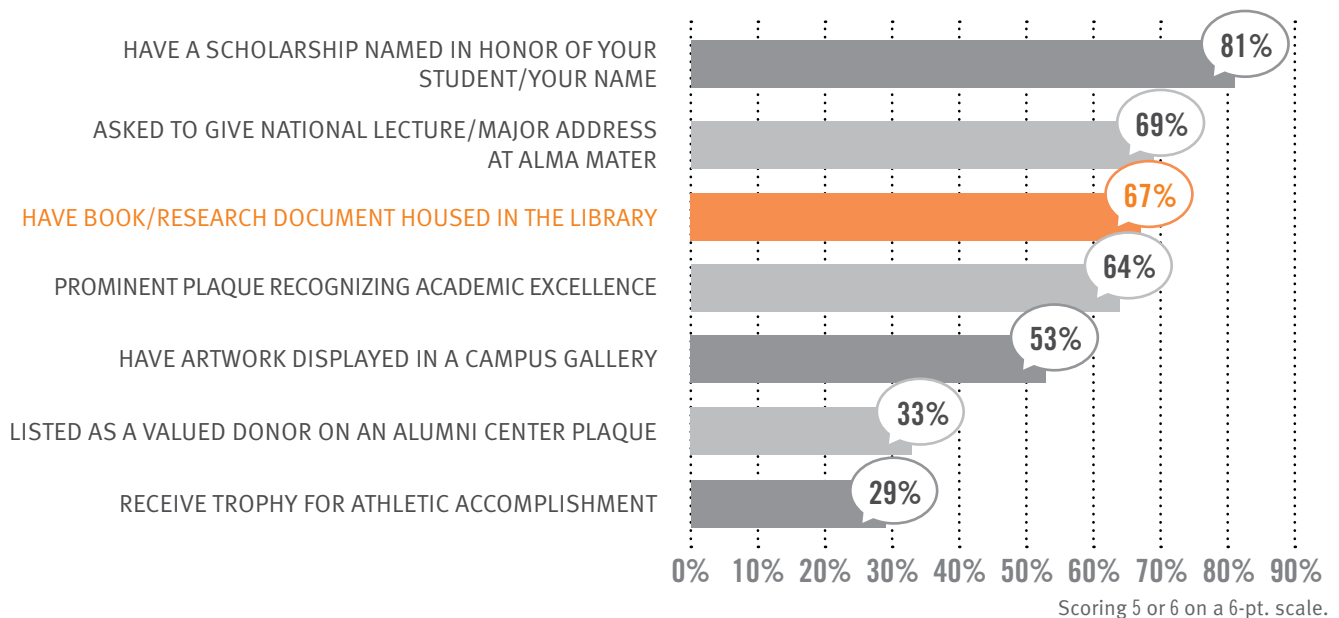**LESS POPULAR CAMPUS PLACES FOR NAMING RIGHTS**

Residence Hall (22%), Artist Studio (16%), University Archives (15%), Alumni House (15%), Sports Field House (11%), Cafeteria (8%)

OCLC

Similarly, two-thirds of parents and alumni said it would provide a great sense of pride to have their work included in a library collection. Those surveyed were asked, *"How much of a sense of pride would you have if any of the following opportunities were provided to you or your student (if parent)?"* A list of options were provided and participants were asked to rank attitudes from it "would provide no pride at all" to it "would instill a great sense of pride."

Having a scholarship in their name (or in the name of their child for the parents) ranked highest, with 81% saying it would instill a great sense of pride. The opportunity to give a lecture (69%) and have their books or research housed in the library (67%) were also seen as great honors.

PROUD TO HAVE MY WORK IN THE LIBRARY

% AGREE THE ACCOMPLISHMENT WOULD GIVE THEM A "GREAT SENSE OF PRIDE"

HAVE A SCHOLARSHIP NAMED IN HONOR OF YOUR STUDENT/YOUR NAME	81%
ASKED TO GIVE NATIONAL LECTURE/MAJOR ADDRESS AT ALMA MATER	69%
HAVE BOOK/RESEARCH DOCUMENT HOUSED IN THE LIBRARY	67%
PROMINENT PLAQUE RECOGNIZING ACADEMIC EXCELLENCE	64%
HAVE ARTWORK DISPLAYED IN A CAMPUS GALLERY	53%
LISTED AS A VALUED DONOR ON AN ALUMNI CENTER PLAQUE	33%
RECEIVE TROPHY FOR ATHLETIC ACCOMPLISHMENT	29%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

Scoring 5 or 6 on a 6-pt. scale.

Online Learners and Using the Library

> "*I absolutely needed a library, particularly for online resources.* I picked online learning for its flexibility away from a campus and libraries are crucial for that."
>
> **FEMALE, AGE 29**

The physical campus library is a valued symbol of longevity, stature and prestige. Libraries are the place where work gets done. Libraries provide tools and access to current, relevant information. Students can rely on the library.

How are these perceptions of the libraries on a physical campus translating to an online learning landscape? What roles are libraries currently playing for online learners?

To augment the research conducted about the physical campus library, the OCLC Market Research team asked current online learners to share their experiences with using the library. A third (39%) of learners who have taken an online class toward a degree used the library or library services. For learners looking to online classes or tutorials to advance learning when not pursuing a degree, a quarter (27%) had used the library or library services to support their work.

Degree seekers were far more likely to use online library resources (28%). While the rates are low, both degree seekers (14%) and non-degree learners (12%) use the physical library at roughly the same rate.

USED THE LIBRARY FOR ONLINE LEARNING

DEGREE CLASS		NON-DEGREE CLASS
14%	Used physical library	12%
28%	Used library online	19%
12%	Used librarian at the library	7%
7%	Used librarian online	5%

AT A TIPPING POINT

The majority of online learners are not using the library. The most frequently cited reason for not considering or not choosing to use a library to assist with degree classes: "the library just didn't come to mind." Others felt the library would not be helpful to them, that it would be too inconvenient or thought it would take too long.

Online learners who were not seeking a degree were less likely to consider using the library; 55% said it just didn't come to mind compared to 43% of learners taking an online degree class.

Online learners who use the library and library resources have great success.

Eighty-three percent (83%) of degree seekers who used the library said that the library was valuable in helping them meet their goals. Three-quarters (75%) of learners who used the library to assist with their non-degree classes also said the library was valuable.

WHY NOT USE THE LIBRARY?

Didn't come to mind for most online learners

DEGREE CLASS		NON-DEGREE CLASS
43%	**Library just didn't come to mind**	**55%**
16%	Did not think it would be helpful	9%
17%	Thought it would be too inconvenient	8%
13%	Thought it would take too long	7%

Base: Have taken an online class/tutorial and did not consider or chose not to use the library.

75% of online non-degree learners feel the library was valuable in helping meet their goals

83% of online degree learners feel the library was valuable in helping meet their goals

LIBRARIES HELPED ME MEET MY GOALS

Found library resources valuable in helping meet my goals

Very valuable or valuable ratings
Base: Used library resources to assist with an online class or tutorial.
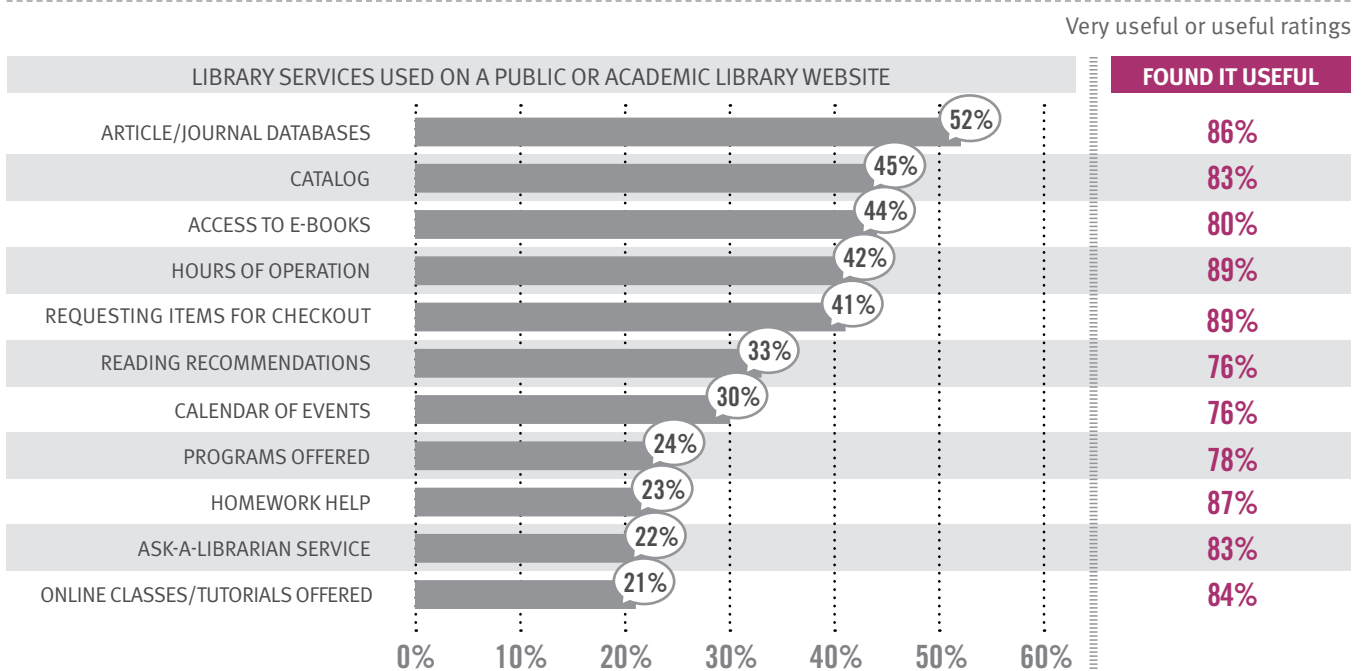
OCLC

Finding and Using the Library Website

Seventy-nine percent (79%) of Internet users begin their online information search on a search engine. There has been little change in this information search behavior over the last decade—82% began their search on search engines in 2005; 84% in 2010 and 79% today. Search habits of online learners are no different; 79% begin their search for information in support of online learning via a search engine.

Online learners are having better success finding library resources when beginning their search on a search engine compared to the overall online population. While 32% of the overall online population begin their search via a search engine and end up at a library website, 41% of online learners did so. Once discovered, the library website is used by 83% of online learners.

Accessing article and journal databases (52%) was the most-used service on the library website. The use of the library's catalog, accessing e-books and checking hours of operation round out the list of most-used services among these online learners. The vast majority found all of the items they used from the library website to be useful.

WEB SEARCHES LEAD TO LIBRARY WEBSITE USE

Online learners who discover the library website via a search engine find it useful

Very useful or useful ratings

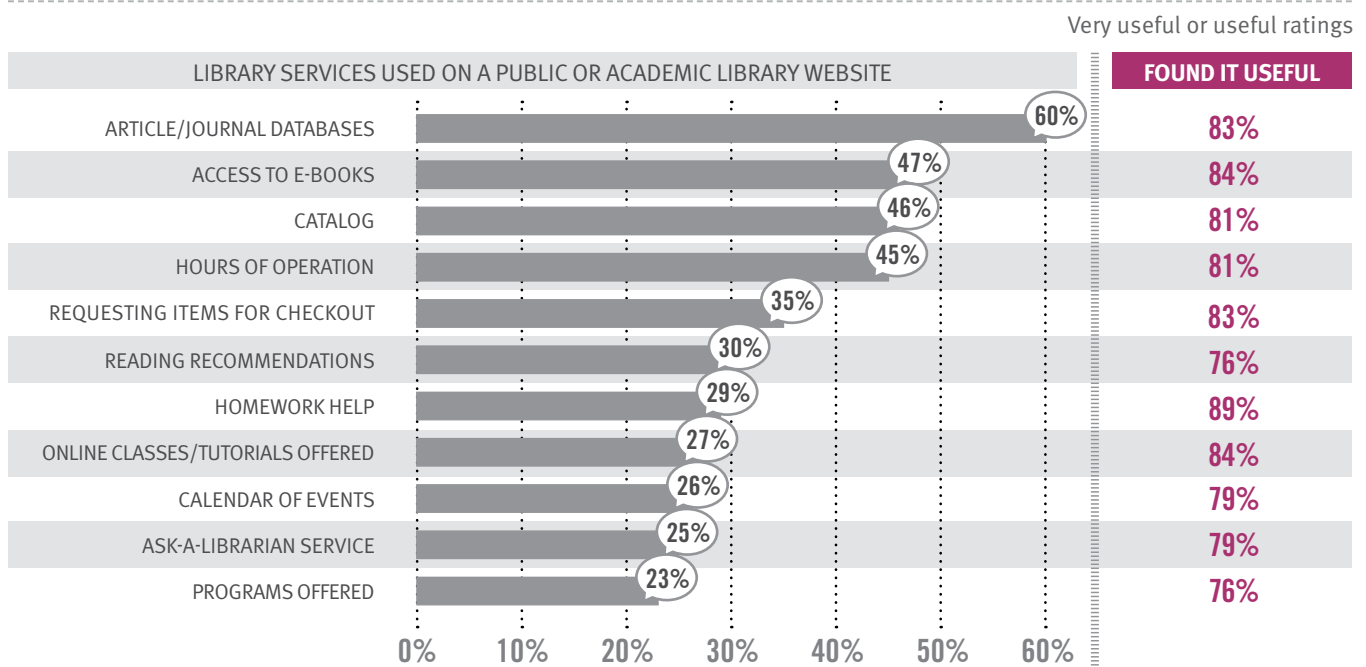| LIBRARY SERVICES USED ON A PUBLIC OR ACADEMIC LIBRARY WEBSITE		FOUND IT USEFUL
ARTICLE/JOURNAL DATABASES	52%	86%
CATALOG	45%	83%
ACCESS TO E-BOOKS	44%	80%
HOURS OF OPERATION	42%	89%
REQUESTING ITEMS FOR CHECKOUT	41%	89%
READING RECOMMENDATIONS	33%	76%
CALENDAR OF EVENTS	30%	76%
PROGRAMS OFFERED	24%	78%
HOMEWORK HELP	23%	87%
ASK-A-LIBRARIAN SERVICE	22%	83%
ONLINE CLASSES/TUTORIALS OFFERED	21%	84%

0% 10% 20% 30% 40% 50% 60%

Base: Online learners who started their search with a search engine and ended up at a library website.

Library website use has increased for college students—42% of college students used the public library website annually in 2010; 67% in 2014. Academic library website use among college students also increased—44% of college students used the academic library website annually in 2010; 61% in 2014.

College students who have taken an online class or tutorial are also finding success discovering library resources after starting with a search engine—64% of college student online learners said they have ended up at a library website and 86% of them used the library website. College students who use a library website find it useful.

WEB SEARCHES LEAD TO LIBRARY WEBSITE USE FOR COLLEGE STUDENTS

College student online learners who find the library website via a search engine find it useful

Very useful or useful ratings

LIBRARY SERVICES USED ON A PUBLIC OR ACADEMIC LIBRARY WEBSITE		FOUND IT USEFUL
ARTICLE/JOURNAL DATABASES	60%	83%
ACCESS TO E-BOOKS	47%	84%
CATALOG	46%	81%
HOURS OF OPERATION	45%	81%
REQUESTING ITEMS FOR CHECKOUT	35%	83%
READING RECOMMENDATIONS	30%	76%
HOMEWORK HELP	29%	89%
ONLINE CLASSES/TUTORIALS OFFERED	27%	84%
CALENDAR OF EVENTS	26%	79%
ASK-A-LIBRARIAN SERVICE	25%	79%
PROGRAMS OFFERED	23%	76%

Base: College student online learners who started their search with a search engine and ended up at a library website.
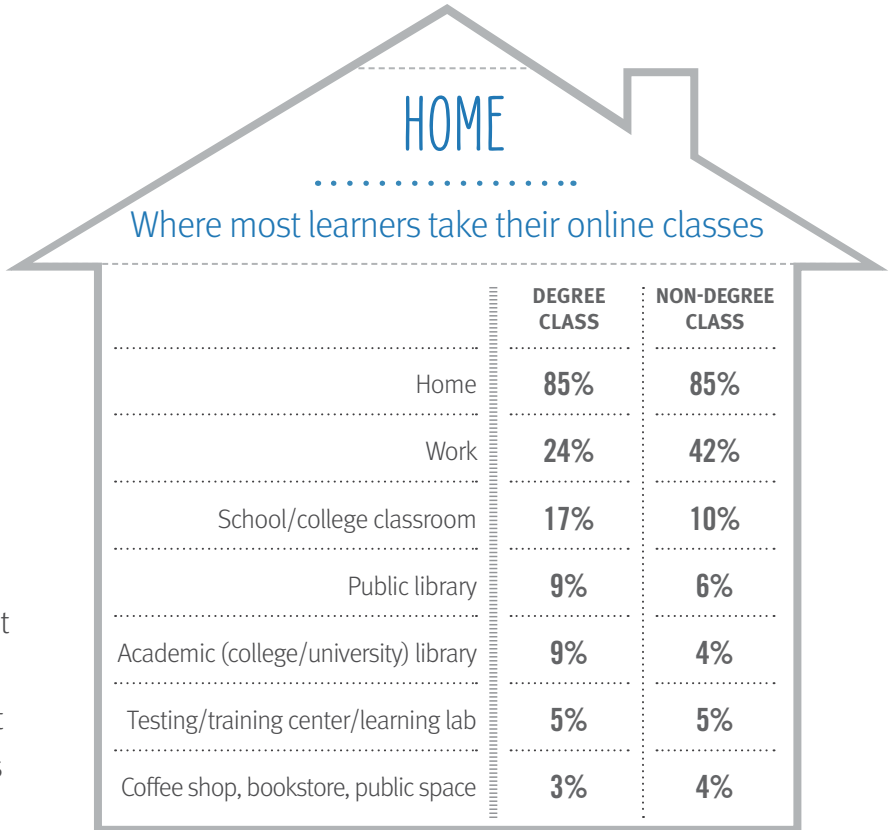
What Online Learners Want

The vast majority of learners take their online classes or tutorials from home. Work is a distant second.

About 10% of online learners have taken an online degree class while in a public or academic library.

What do online learners want from their libraries? Mirroring what we learned about the perceptions and the distinct role of the campus libraries, online learners want libraries to provide the spaces and access to tools to get their work done.

Half or more of online learners, whether they have taken a degree or non-degree online class, say it is important for the library to provide access to and instructions on how to use the library's materials and resources. Access to freely available information on the Web, as well as tools, consultation and instructions on how to conduct research topped the list of needs.

Even though the majority of online learners are taking their classes at home, more than half say a place to meet/study in-person is needed. Equipment to take online classes, librarians and research support are more important for online degree class learners.

HOME
Where most learners take their online classes

	DEGREE CLASS	NON-DEGREE CLASS
Home	85%	85%
Work	24%	42%
School/college classroom	17%	10%
Public library	9%	6%
Academic (college/university) library	9%	4%
Testing/training center/learning lab	5%	5%
Coffee shop, bookstore, public space	3%	4%

Base: Have taken an online class or tutorial. **Note:** Could select multiple responses.

WHAT ONLINE LEARNERS WANT
It is important for the library to provide services

DEGREE CLASS		NON-DEGREE CLASS
71%	Access to library materials	69%
69%	Access to freely available information on Web	61%
66%	Tools for conducting research	57%
65%	Instruction on using library resources	62%
61%	Consultation on how to conduct research	52%
59%	A place to meet/study in-person	51%
58%	Ask-a-librarian services	49%
57%	Equipment (e.g., computers)	47%

Very important or important ratings
Base: Have taken an online class or tutorial.

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EDUCATION AT A TIPPING POINT

"The online experience for myself has rewarding aspects such as: flexible scheduling, less gas burned, and *most important— experience with the future trend of education*."

MALE, AGE 26

Learners are reimagining what education can become. In this chapter we review what we learned.

Confidence, easy-to-use Web platforms, the ubiquity of mobile devices and the steep cost of higher education are fueling consumers' appetites for more convenient, more cost-effective education options.

In 2007, 24% of Internet users who used the Internet had taken an online class. In seven years, that number has doubled. Today, about half of the American online population is now learning online. Those who have tried it like it, and they believe that online classes, courses, MOOCs and tutorials will get better and more popular. Those who have not yet tried online learning are also enthusiastic. Influenced by what they hear, read and observe, they, too, predict that online learning will gain steam.

A summary of findings—highlights are provided on the next three pages—show that:

- Online learning is **meeting a need**

- Online learning is **life-based learning**

- Users' expectation of libraries is books...and a **place to get some work done**

- And MOOCs are a massively interesting **case study** on the **future of education.**

RESEARCH SUMMARY:

ONLINE LEARNING IS MEETING A NEED

Americans are learning online. Nearly half of all Internet users have taken a course, class or tutorial online.

The digital divide may be closing—across income, education and age levels.

Online learning is effective. Users' goals are met, and most believe that quality and popularity will continue to grow. They recommend it.

The general public is not yet familiar with MOOCs. The ones who have taken a MOOC say their goals are being met.

College students are more familiar with MOOCs. Twenty-seven percent (27%) know about MOOCs; 8% have taken a MOOC. Students say their goals for taking a MOOC are being met.

Cost is the top-of-mind perception of a **college education** for parents.

The **cost** of a college education **is out of balance with the value received** according to most parents and students funding a college education.

Affordability is the top selection criteria for parents and students when choosing a postsecondary institution.

Online education is expected to lower the cost of higher education. Retailers have conditioned consumers that online saves money.

OCLC

RESEARCH SUMMARY:

ONLINE LEARNING IS LIFE-BASED LEARNING

Convenience wins—on and off the Web.

Convenience is the #1 benefit of taking an online class. Cost savings are important and expected, but convenience is the most valuable benefit.

Online learning happens at home—at learners' convenience, in suits or pajamas, at their pace.

Ageless. More than a third of the online population over age 60 have already taken an online class or tutorial.

Online learning will go mobile. Nearly a quarter of online learners have already taken a class from a phone or tablet.

College classes will go online. Nearly half of college students predict that students will be taking at least half of their classes online within five years.

Classes in the social sciences and humanities are equally effective online as in person. Students who have taken online and in-person degree classes say that learning social sciences or humanities online is as effective as learning in the classroom. Business, engineering and other applied sciences are better taught face-to-face.

RESEARCH SUMMARY:

THE LIBRARY IS BOOKS … AND A PLACE TO GET WORK DONE

The library brand, "books," has solidified. Attitudes across age groups are converging. Library nostalgia has faded for seniors. For youth, the library is less of a "dull place."

An on-campus college experience matters to parents and students— even more so for those paying the tuition bills.

**Campus libraries hold a distinctive place** in the minds of alumni and college parents.

Campus libraries are "a place to get work done." The academic library is not the "heart of the campus." It is not the place "where everything [on campus] comes together." It's where work happens.

Libraries improve learning. Users say that libraries help them achieve their goals—both classroom learning and online learning.

"It didn't cross my mind." Most online learners don't think about using library resources or a librarian's assistance when learning online.

Libraries have a context challenge, a brand category problem. Relevance is determined by perceptions, not products, not services, not reality.

MOOCs: A Case Study on the Future of Education
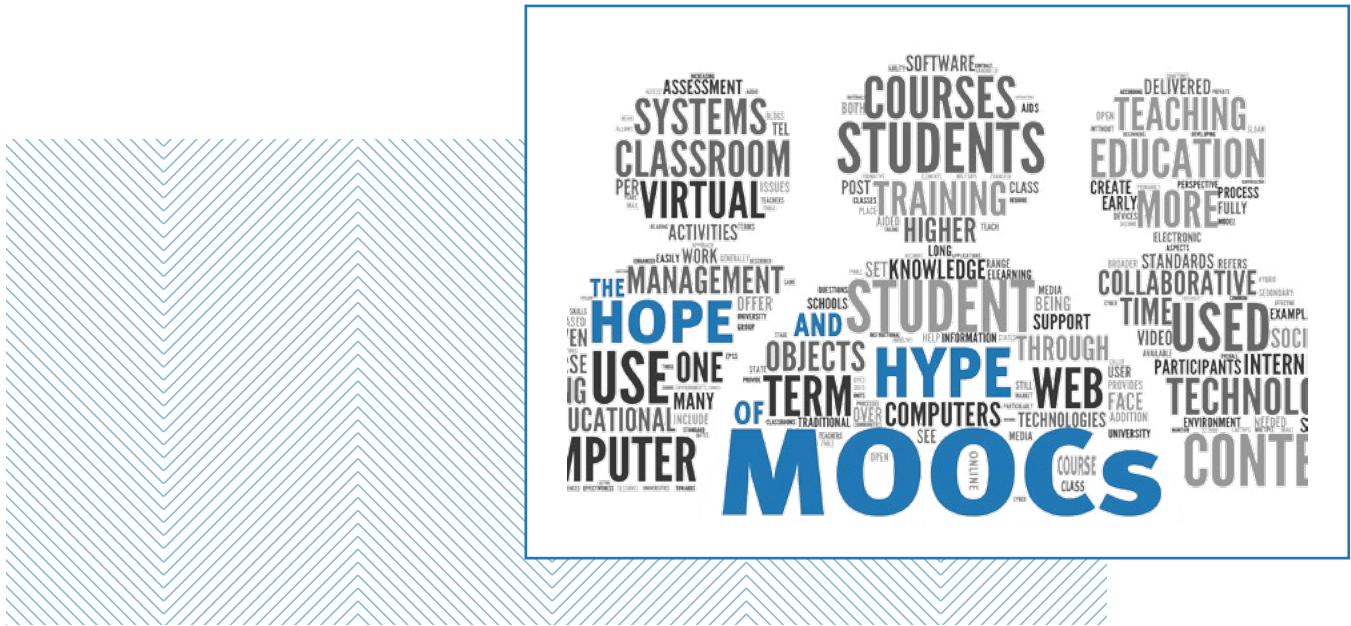
The Web and mobile expectations now placed on commercial organizations—e.g., shops and banks—to be fast, mobile and personalized will be expected from schools, colleges and libraries. Expectations drive change—ready or not.

MOOCs are resetting expectations for education.

It's not that online education is new. As our 2007 study, *Sharing, Privacy and Trust in Our Networked World*, illustrates, a large number of Internet users have been learning online for years, and dozens of online companies have generated thousands of classes and tutorials. MOOCs, however, are doing something new. Not just delivering education online, MOOCs are changing how thousands of learners feel and think about education. They are pushing the boundaries of consumers' imaginations further and faster.

MOOCs may not be the ultimate answer, but thankfully, MOOCs are rapidly discovering the right questions to ask. They are massively interesting learning laboratories. And, they are applying marketing techniques that are creating awareness and interest not before seen in education. By adopting the "immutable laws of marketing," principles of marketing success established by Al Ries and Jack Trout, MOOCs are leading change and getting consumers to pay attention and join in.

MOOCs: Massively Interesting Learning Laboratories

LAW #1: THE LAW OF LEADERSHIP
It's better to be first than it is to be better.

—Al Ries and Jack Trout, *The 22 Immutable Laws of Marketing*

Quick addition of the participation rates reported by MOOC providers suggests that more than 15 million learners of all ages, education levels, income levels and from most countries have already participated in a MOOC—or have at least signed up to receive a user ID to find out what massive open online courses are all about.

Even registrants who have not participated in a single hour of a single class are receiving e-mails, promotions and updates. MOOC providers are educating millions of consumers, participants and observers about online courses, learning platforms and how learners are having success with this new mode of learning.

MOOCs are bringing the benefits of easy access, vitality, energy and flexibility to education.

Education at "MOOC scale" provides an ability to collect consumer intelligence data not previously available. MOOC learners generate real-time information about learning styles, preferences, success indicators and potential blockers. This data will bring new insights and highlights potential learning levers not previously visible.

The advent of MOOC platforms enable the collection of consumer intelligence that other Web platform providers—Amazon, Google, YouTube, Facebook—have leveraged to redefine shopping, information access, entertainment and communications. Scale creates the data, intelligence and the ability to set consumer expectations on a very large canvas. Successful Web platform providers have proven that it is possible to reset user expectations, even if the quality of the product delivered is inferior to current alternatives.

MOOCs are poised to take this leadership position for education—resetting the expectations for all others.

The Marketing of MOOCs

LAW #2: THE LAW OF THE CATEGORY
If you can't be first in a category, set up a new category you can be first in.

—Al Ries and Jack Trout, *The 22 Immutable Laws of Marketing*

The marketing strategies and consumer engagement practices being deployed by MOOCs mirror the successful tactics and programs of other large Internet platform companies. These education entrepreneurs are not positioning themselves to compete head-to-head with traditional education institutions or services. They are building a new class of education, one designed to supersede, not compete with, the current rules. In marketing terminology, MOOCs are creating a new product category.

A quick look at the marketing and engagement practices of three online learning suppliers, Coursera, edX and TED-Ed, illustrate these strategies in action. These entrepreneurs were selected for review, not because it is anticipated that any one of them will change the game singlehandedly, or even that these early leaders will continue to lead. They were selected because they provide good examples of how MOOC providers are using proven online consumer engagement and marketing tactics to reshape user experiences and create new expectations for how education can work and should work.

MOOCs have brought consumer marketing to education. Familiar practices—promotions, invitations, recommendations, mobile apps, crowd sourcing, etc.—are helping millions of online learners find, enroll and consume education in new ways. Partnerships with universities, technology providers and commercial vendors reinforce the perceptions of the quality and reliability of MOOCs and increase their reach.

By attracting and engaging very large audiences, MOOCs are experimenting and innovating, learning and adapting at rates not previously imaginable for higher education. TED-Ed advertises on its website that it has enabled the creation of more than 78,000 lessons and helped answer 2.5 million questions. The edX website outlines its commitment to "research that will allow us to understand how students learn, how technology can transform learning, and the ways teachers teach on campus and beyond." Coursera's site notes education partners in 21 countries, with over 700 courses, creating the ability to explore differences and similarities in learning styles across a vast geography for a single course or session. MOOCs are gathering data about learners' needs and habits never before available and, most importantly, MOOCs are inviting and empowering learners to reinvent education together.

MOOCS ARE MARKETING THE FUTURE OF EDUCATION

· · · · · · · · · · · · · · · ·

Marketing practices utilized by online retailers, banks
and social networks have come to education:

Energy! It's easy. It's fun. Sign up now!

Invitations. You're invited vs. please apply.

Tutorials. Demos and quick tips on how to succeed.

Communities. Peer-to-peer learning.

Customer-centric. Customer success over student outcomes.

Easy. Quality is experienced, but ease is marketed.

Mobile, mobile, mobile. My device, my timeline, my location—coming soon.

TED-Ed   6.12.2014

Incentives. Matched to personal goals: Scholarships for degree seekers. Badges and certifications for life-based learners.

Teasers. 'Coming soon'—currency, relevance and energy.

Up-selling and cross-selling. 'You liked that, try this.' From classes to course paths. Personalized learning plans.

Advertising. Customer success stories. Testimonials.

Recommendations. User ratings.

Notifications. Reminders—we're students. ☺

Note: Font increased   Coursera   6.12.2014

edX   6.12.2014

Promotions. Engaging instructors market and promote classes.

Celebrations. Successes, milestones, achievements—even birthdays.

Partnerships. Platforms power partnerships—universities, mobile carriers, advertisers, textbooks…libraries.

LIBRARIES AT A TIPPING

Resetting the Context, Reframing the Library

In this chapter we conclude our studies with observations and recommendations for how libraries can take advantage of this shift.

Libraries deliver.

Overwhelmingly, online learners say that the library is valuable in helping them achieve their learning goals—when it is used.

But perceptions are hindering delivery of that value. Usage of the library by online learners is far too low. Value is there, but mindshare is missing.

The library just "didn't come to mind" for the majority of online learners. Other non-users perceive the library as inconvenient or that it takes too long to be helpful. The tipping point that is comimg to education creates an opportunity point for libraries to reset these perceptions.

As education consumers change learning behaviors and attitudes, libraries have an opportunity to reframe how online learners think about and experience libraries.

Just as MOOCs are applying Ries' and Trout's "immutable laws of marketing" to education, so, too, can libraries use these marketing principles to reset the context for how libraries are viewed and reframe both the library and the library brand.

Tipping Points are Opportunity Points

LAW # 4: THE LAW OF PERCEPTION

Marketing is not a battle of products, it is a battle of perceptions.

—Al Ries and Jack Trout, *The 22 Immutable Laws of Marketing*

Tipping points create opportunities.

When large numbers of consumers are adopting new services, changing their behaviors and setting new expectations, a window of opportunity is created for those organizations that see the change—that see an opportunity—and act.

When behaviors change, the lens through which consumers view services, organizations and brands can change. This is certainly the case for those organizations and services being tipped (colleges and online education), but it can also be true for organizations that serve those same customers. Organizations aware of behavior and perception shifts can communicate and market from new or modified vantage points. A brand, product or service that may not have been as valued or seen as relevant in a previous setting can become more attractive, more relevant. Likewise, services, brands or product features once seen as relevant can lose value.

An example helps illustrate the point.

Prepackaged, frozen meals, today a multibillion dollar market, began in 1953 when C.A. Swanson & Sons offered consumers frozen turkey dinners. A TV dinner (the full original name was "TV Brand Frozen Dinner") usually consisted of a cut of meat, typically turkey, beef or chicken; with a vegetable, such as peas, carrots, corn or potatoes; and sometimes a dessert, served in an aluminum tray that could be heated in the oven (Wikipedia, 2014). This product was a perfect product fit for a country eager to increase its recreation time, in this case, television time, over time spent in the kitchen.

FROZEN DINNER—THEN

Over the next half-century, the market and the marketing for the frozen meal evolved. As consumer preferences and technologies changed, so did the messaging and value proposition of the TV dinner.

The microwave created the potential, a new consumer context, for TV dinners. Frozen dinners became lunchtime meals—perfect for a quick meal at work or at school for working families. Frozen breakfasts for busy households and meals tailored to the taste preferences of children were introduced.

Fast forward to 2014, many of the frozen meals today are marketed as 'healthy' or 'lean' meal options, focused on delivering value to a culture concerned with convenience, but now also conscious about the health and dietary features of its meals.

FROZEN DINNER—NOW

The basic ingredients of the frozen dinner, the product, have remained remarkably stable—meat and vegetables. But the context in which consumers value and evaluate the relevancy of the product has moved considerably.

The product messaging and positioning of the frozen meal have been energized, updated and reinvented as consumer habits and needs evolved. Frozen meals are as relevant to consumers today as they were 10, 20 or 50 years ago.

Relevancy is about fitting services to consumer context. Relevancy is about perception, not product.

Changing landscapes and marketing tipping points provide organizations new opportunities to reset their product messaging based on the current consumer context. What's changing? Where is consumer value moving?

A new landscape for education creates an opportunity for all organizations that serve learners to reframe and reset user expectations for their services. It creates a great opportunity for libraries.

"The library has always been my go-to place, now I can *just plug in*."
COLLEGE STUDENT, FEMALE, AGE 62

What Online Learners Need

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LAW #21: THE LAW OF ACCELERATION
Successful programs are not built on fads, they're built on trends.

—Al Ries and Jack Trout, *The 22 Immutable Laws of Marketing*

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Online learning is a trend gathering steam, not just a passing fad.

Success strategies for libraries are built on matching future user needs with relevant library services and value. What do online learners need?

Certainly learners, online and off, need quality classes, tutorials and instructors. But great class content and energizing instructors are just part of what is required for successful online learning.

Online learners need a support ecosystem.

Survey respondents shared that there are challenges associated with online learning: Self-discipline, space to work, tools for peer-to-peer and student-to-instructor interaction, and the need for ready access to information resources.

The online learning ecosystem is just beginning to be fully understood. It is in its early days.

Libraries are in a unique position to both shape and deliver many of the services and resources online learners need to succeed.

WHAT ONLINE LEARNERS NEED

➢ **A place to get work done**
- Equipped, convenient, comfortable, nearby

➢ **Tools to get learning done**
- Monitors, printers, Wi-Fi, electricity
- Technical support

➢ **Information**
- Quick links to support materials
- Easy-to-use and easy-to-cite
- Videos
- Awareness—what support materials exist?

➢ **Support communities**
- Help when needed
- Discussion groups and peer-to-peer dialogue
- Text-an-expert

➢ **Incentives**
- Degrees, certificates, badges
- Ability to help shape education

➢ **Tools to track progress**
- Dashboards, reminders
- Personalized learning plans

Resetting the Context, Reframing the Library

STATUS QUO

POINT

RESET

"A brand needs to gain and maintain relevance, or no amount of differentiation and loyalty will matter."

—David Allen Aaker, *Brand Portfolio Strategy* (Epilogue)

Library brand = books. Seventy-five percent (75%) of information consumers—across all ages—believe that libraries equal books. And that brand association is growing stronger.

The library does not have a product problem. The library does not have a book problem. The library has a context problem.

Libraries must reset their brand context. As consumers' perceptions and needs are reshaped by online learning, a new window of opportunity opens. By messaging consumer needs, not products, the library brand can build new relevance for online learners.

Changing library context is not about changing library products—it is about actively putting library services into a new context—focusing attention only on the benefits most relevant to learners.

What actions are needed to seize this opportunity? Turning again to the work of branding expert David Allen Aaker, organizations that thrive over time update their brands and brand image by doing three things:

>> **Adapting** their product **features** and **messages** to match market dynamics

>> Continuously **energizing** service offerings to remain vibrant

>> Creating and promoting the **differentiators** that match the consumer needs while **retaining congruency** with the expectations of the brand.

Adapt library offerings to meet market dynamics

Which consumer benefits will grow in value as learning moves online, as the cost of education continues to climb, as mobile phones become the device for life for consumers? A few possibilities:

- Students and parents—very concerned about the economics of higher education—value **places** optimized to "get work done" that increase the learning achieved for the price paid, that **provide support to help students graduate on time**.

- Students and parents—anxious about the prospects of employment after graduation—value places equipped with tools, technologies and expertise to **increase the probability of individual success**.

- Faculty and scholars—serving students in a virtual classroom—value the support **ecosystems** that help learners succeed.

- Learners—dependent on their phones, tablets, PCs and reliable Internet access to **learn, apply for jobs and take a class**—will increasingly value technological support, Wi-Fi access and backup technology.

- Learners—taking classes at home—will increasingly value immediate access to articles, journals and videos to **support their learning goals**.

These consumer benefits—from reliability to personalized service—will grow in value as learning moves online, as the expectations of what education can be are reshaped.

> **Convenience**. Space optimized to **get work done**.
> **Reliable, free** Wi-Fi. Technology **assistance**.
> **Immediate** 24x7 access to current information.
> **Personalized** support.

Convenient access, personalized support, work spaces, ready access to materials—are inherent in today's library products. And data show that online learners who use these library services see increased success (75% of learners taking online non-degree classes and 83% taking online degree classes said the library helped them reach their goals).

But usage rates will continue to be low if the consumer view into libraries is not reframed. Libraries can reframe their current services by reframing their messages.

For example, library spaces can be reframed in today's context. This idea, the value of library facilities to meet learner needs, is certainly not new. Many articles have been published that identify and validate the important and unique benefits of "library as place" or the library as "a third place." But, the lens on that value needs to be updated to meet current consumer needs. The need is not a place, but what happens in the place—work gets done.

It is critical to differentiate between the need and product when reframing value. The library space is a product. "Getting work done" is the need.

Repositioning the library offerings to shift the focus from 'place' to 'get work done' creates a new point of relevance to online learners. Making work personal reinforces the benefits and increases the relevancy.

> *Get work done.*
> *Get work done—We provide the space.*
> *Get work done—We provide the tools.*
> *Get work done—We provide expert support.*
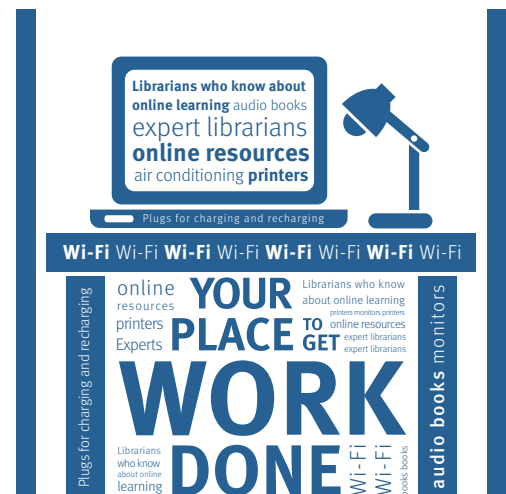
Likewise with library materials and service: the library products include articles, books and ask-a-librarian services. But the need is "convenience," "immediacy" and "help now." Reframing the value creates new relevancy.

> *The library delivers.*
> *The library delivers—at 2:00 am.*
> *The library delivers—We make house calls.*
> *The library delivers—We're online. Need help? Text us.*

Adapting messaging around library offerings to meet new education market dynamics will create new relevancy for online learners.

Energize!

Successful organizations continuously energize service offerings to remain vibrant.

The only constant to online life is change. Commercial websites change daily—if not hourly. Promotions, new offers, tweets and invitations to join discussions or share our ratings fill our e-mail and texts—and demand our mindshare.

Change creates energy. Energy conveys relevance.

Out of sight, out of mind. But, on my mobile, on my mind.

Changing and personalizing library messages, websites and promotions with increased frequency will create energy and increase mindshare.

The Marketing of MOOCs (see Chapter Five, page 82) highlights examples of how online educators are bringing new energy to learning. Videos, invitations, vibrant class descriptions and personalized messages from instructors change how users will view, and feel about, learning.

Libraries have the opportunity to energize their brand using these same techniques.

The research reminds us that libraries are seen as institutions that will last. Libraries have longevity, they "help students learn from the past." They are stable, reliable, steady. These beliefs about the library are valuable—but they also work against the perceptions of the library as a vibrant, current organization.

We can learn from banks how to energize traditional services as consumer value shifts. Banks have shifted their offer to place a focus on convenience, mobile access and personalized assistance. Banks must still be seen by consumers as stable, reliable, steady—to market those values only reinforces the well-established brand image. But by energizing the brand by focusing on speed and mobile access, they have increased relevance for consumers.

Libraries have this same opportunity.

Differentiate, Focus

Great brands create and promote differentiators that match current consumer needs. Great brands, those that endure over time, ensure that any new differentiators also remain congruent with the expectations of the brand and the values of the organization.

Adapting offers to match consumer needs and **energizing** the brand through messaging builds relevance. But **focus** is also required.

Selecting which benefits to put center stage is often the hardest, riskiest part of brand revitalization. Most organizations, including libraries, offer many valuable services. The pressure to share "all we do" is great. The fear of placing all of the focus on one or two benefits, at the risk of selecting incorrectly, often overpowers even the strongest marketers and boldest leaders.

But, **focus** requires **sacrifice**.

Where should libraries focus their value offer?

The evidence is strong. By far, the primary benefit of online learning is convenience. Education, learning and library services that are viewed as convenient will be viewed as relevant.

Inconvenient = irrelevant. Out of sight, out of mind. On my mobile, on my mind.

The evidence is strong. Students, parents and online learners see library spaces as convenient places to work. They value online access to materials. They say that libraries provide the tools to get work done and offer relevant, current information.

LAW # 3: THE LAW OF SACRIFICE

You have to give up something in order to get something.

—Al Ries and Jack Trout,
The 22 Immutable Laws of Marketing

Putting library convenience center stage will increase library relevance.

A stronger focus on the convenience benefit will drive greater value. Libraries must create energy and awareness around library **convenience**—or no amount of library brand loyalty will matter.
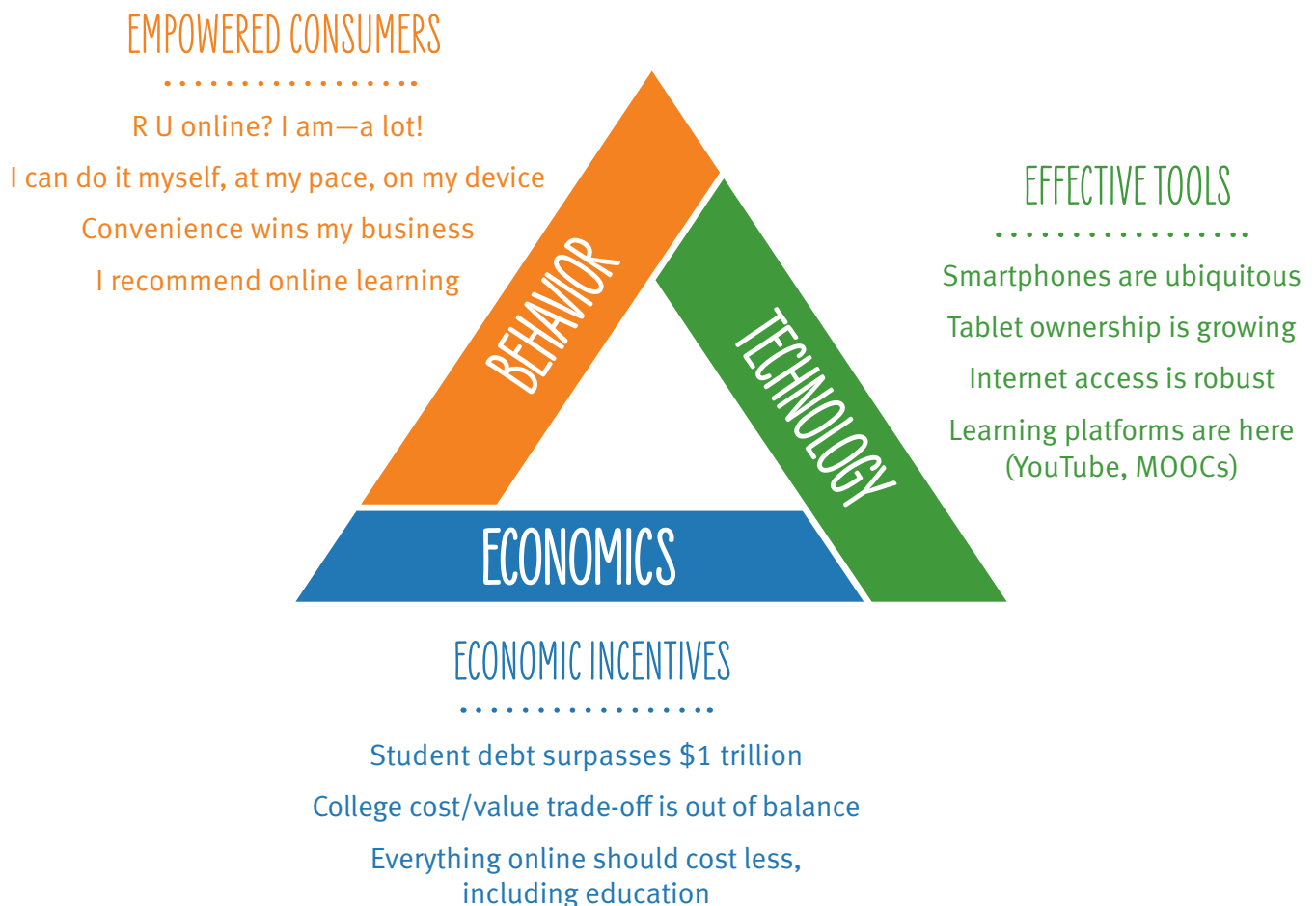
OCLC

A Tipping Point is Coming to Education

The research shows that the forces of change are aligned. Consumers want online education. It meets their goals. They recommend it. College = cost. Education is worth it, but the cost/value imbalance leaves learners no choice but to find alternatives. MOOC platforms are serving thousands. Mobile phones are ubiquitous.

The predictors of change are visible—consumer confidence, enabling technologies and economic incentives—are all pressing together against the traditional practices of education, tipping the tables toward a new model of learning—life-based, dynamic, not yet perfect, but continuously advancing.

Library services match the needs of online learners, but the perceptions do not. This tipping point in education is an opportunity point for libraries. A brand, locked in time by the physical book, can be released, energized, adapted, and made relevant.

FORCES OF CHANGE FOR EDUCATION

EMPOWERED CONSUMERS

R U online? I am—a lot!

I can do it myself, at my pace, on my device

Convenience wins my business

I recommend online learning

BEHAVIOR

TECHNOLOGY

ECONOMICS

EFFECTIVE TOOLS

Smartphones are ubiquitous

Tablet ownership is growing

Internet access is robust

Learning platforms are here
(YouTube, MOOCs)

ECONOMIC INCENTIVES

Student debt surpasses $1 trillion

College cost/value trade-off is out of balance

Everything online should cost less,
including education

Next Steps

Watch the development of MOOCs today and 'MOOC 2.0.' Watch both the courses and the marketing—users are. Chart user satisfaction rates along with completion rates. Better yet, join in.

Create online classes for the community, embed library services into life-based learning. Showcase library convenience—and deliver it on MOOC platforms and on mobile devices.

Energize the library brand. Online learners need libraries. They said so.

Library users are online learners. **Making convenience the new context for libraries can make all online learners library users.**

The road ahead is not yet paved. In the words of Bill Gates, "We always overestimate the changes that will occur in the next two years." But the scope and value of online learning to consumers eager for life-based learning will be far greater than we now imagine—"we underestimate the change that will occur in the next ten years."

Don't miss the cues.
The sparks are visible.

"Online learning allows you to *take control of your education* in a way that in-person learning lacks...

...Although it provides you with a *flexibility* in time and lets you *choose your own schedule* that fits your life...

...it forces you to be *motivated* and *responsible* on your own because you don't have a professor there with you....

...I've learned how to *better manage my time* with the use of online learning and how to *improve my study skills*."

COLLEGE STUDENT, MALE, AGE 33

APPENDIX A

Methodology

Two national research studies were conducted by the OCLC Market Research team.

OCLC commissioned two national research companies, Harris Interactive (2014) and glass box research company (2012), to conduct the online surveys. Both studies were open to residents of the United States and were conducted in English.

Harris drew a sample of people from the Harris Poll Online, and glass box research drew a sample of people from the Research Now panel. Sample participants did not get paid but earned reward points for their participation.

The OCLC Market Research team analyzed and summarized results to produce this report.

While our two studies were conducted in the United States, equitable access to quality higher education is not a U.S.-specific concern. Access to higher education is a pressing issue in many countries around the world with the costs for private institutions getting more expensive and the capacity of publicly funded institutions becoming less sufficient to meet increasing enrollments (ACE, 2014). The potential impact that expanding options for online learning can have on higher education accessibility is not limited to the United States. In fact, demographic studies of MOOC participants indicate that the majority are not from the U.S. (Christensen et al., November 2013; Nesterko et al., 2014). Technological advancements are fueling the online learning opportunities, leading to a tipping point that goes beyond any one country or region.

Harris Interactive/Harris Poll Online

Harris Interactive drew a sample from the Harris Poll Online panel and surveyed 3,728 respondents, age 16 or older, in December 2013–January 2014.

The survey pool consisted of higher education customers, i.e., parents of children who will be attending college over the next four years (high school juniors and seniors as well as college freshmen and sophomores), and students themselves currently in these grades. The study was designed to focus on libraries and the online learning environment. In addition to parents and students, additional adults were also surveyed to investigate online learning in all of its formats for all ages, not limited to higher education settings.

Data were weighted in order to allow for inferences to be made about the U.S. online population. Sampling error: +/- 1.61 at the 95% confidence level for the total respondents.

RESPONDENTS

TOTAL RESPONDENTS	**3,728**
HIGH SCHOOL STUDENTS	5%
ADULTS 18–24	8%
ADULTS AGES 25–35	14%
ADULTS AGES 36–50	32%
ADULTS AGES 51–59	22%
ADULTS AGES 60+	19%
	100%

HIGHEST LEVEL OF EDUCATION

TOTAL RESPONDENTS BY EDUCATION	**3,728**
CURRENT HIGH SCHOOL STUDENTS	5%
HIGH SCHOOL DEGREE OR LESS	21%
SOME COLLEGE OR TRAINING AFTER HIGH SCHOOL	28%
ASSOCIATE'S DEGREE	9%
BACHELOR'S DEGREE	23%
SOME GRADUATE WORK OR DEGREE	14%
	100%

HOUSEHOLD INCOME

TOTAL RESPONDENTS BY INCOME	**3,728**
LESS THAN $25,000	11%
$25,000–$49,999	19%
$50,000–$99,999	37%
$100,000 OR MORE	28%
DECLINED TO ANSWER	5%
	100%

COLLEGE STUDENTS BY AGE

COLLEGE STUDENTS	856
COLLEGE STUDENTS AGES 18–19	34%
COLLEGE STUDENTS AGES 20–24	26%
COLLEGE STUDENTS AGES 25–34	25%
COLLEGE STUDENTS AGES 35+	15%
	100%

COLLEGE STUDENTS BY COLLEGE TYPE

COLLEGE STUDENTS	856
TRADITIONAL FOUR-YEAR	49%
COMMUNITY/VOCATIONAL	61%
ONLINE-ONLY	11%

Note: Could have selected more than one college type.

PARENTS

TOTAL PARENTS	852
PARENTS OF HIGH SCHOOL STUDENTS	427
PARENTS OF COLLEGE STUDENTS	425
PARENTS OF TRADITIONAL FOUR-YEAR COLLEGE STUDENTS	63%
PARENTS OF COMMUNITY COLLEGE/VOCATIONAL COLLEGE STUDENTS	37%
PARENTS OF ONLINE-ONLY COLLEGE STUDENTS	3%

Note: Could have selected more than one college type.

Definitions:

Online degree classes—classes taken online toward a degree, certificate or license at a traditional four-year, community college or online-only college.

Online non-degree classes—classes or tutorials taken online for work (e.g., computer/software, management skills, etc.), continuing education (e.g., offered by professional associations) or personal growth/skill enhancement (e.g., recreation/hobby-related, do-it-yourself, health-related, learning new language, etc.).

Funders—Parents and students were asked if they are or will be funding all or a portion of their child's or their own college education. Survey results describing those who are "helping to pay for (or fund) the cost of college" or "funders" are those who are or will be funding some or all of the college education.

% FUNDING A COLLEGE EDUCATION

PARENTS WHO ARE OR WILL BE FUNDING	**73%**
COLLEGE STUDENTS WHO ARE FUNDING	**73%**
HIGH SCHOOL STUDENTS WHO WILL BE FUNDING	**65%**

WHERE DO ONLINE USERS BEGIN THEIR INFORMATION SEARCH?

TOP FOUR SELECTIONS	ALL RESPONDENTS	ONLINE LEARNERS	COLLEGE STUDENT ONLINE LEARNERS
SEARCH ENGINE	79%	79%	66%
WIKIPEDIA	4%	5%	7%
LIBRARY WEBSITE	2%	2%	6%
ONLINE DATABASES	2%	3%	6%

LIBRARY WEBSITE DISCOVERY VIA SEARCH ENGINE

	ALL RESPONDENTS	ONLINE LEARNERS	COLLEGE STUDENT ONLINE LEARNERS
% WHO STARTED WITH A SEARCH ENGINE AND ENDED UP AT LIBRARY WEBSITE	32%	41%	64%
% WHO USED THE LIBRARY WEBSITE (from the search via a search engine)	79%	83%	86%

glass box research/Research Now

glass box research company drew a random sample of people from the Research Now panel and surveyed 1,610 adults in July 2012.

The survey pool consisted of university customers (alumni and parents); half were alumni with a bachelor's degree or higher from a four-year college or university, and the other half were parents of children currently attending a four-year college or university. The study was designed to understand how the perceptions of the university customers shape their beliefs and attitudes of the university experience and what role the library plays.

Data were weighted in order to allow for inferences to be made about the U.S. general population. Sampling error: +/- 5.7 at the 90% confidence level for the total respondents.

TOTAL RESPONDENTS	1,610
PARENTS OF CHILDREN CURRENTLY ATTENDING A FOUR-YEAR COLLEGE	805
ADULTS WITH BACHELOR'S DEGREE OR HIGHER FROM A FOUR-YEAR COLLEGE	805

Perceptual Mapping

Study participants were asked to evaluate a subset of 17 campus elements—services and facilities that are common across most campuses—against 60 different attributes, indicating the degree to which the attributes describe each element.

The results were analyzed using correspondence analysis mapping to understand the emotional and functional dimensionality of the elements tested. Because some campus elements that are more popular or well-known tend to score higher overall, perceptual mapping allows researchers to rank not popularity, but rather distinctions, to better understand which attributes best describe each of the campus elements.

The placement of the 17 campus elements and 60 attributes on the Campus Perception Map (presented in Chapter Four) was generated by using a correspondence analysis technique. There were no preconceived outcomes or suggested grid placements of any elements or attributes prior to the research outcomes.

Reading the Perception Map

The distance from the center of the map indicates how distinct a point is. The farther the distance a point is from the origin (center of the map) signifies how differentiated (distinctive) it is from the other points.

Points closer to the origin (center) have more in common or are more similar.

PERCEPTION MAP

DISTINCTIVE

DISTINCTIVE

COMMON

DISTINCTIVE

DISTINCTIVE
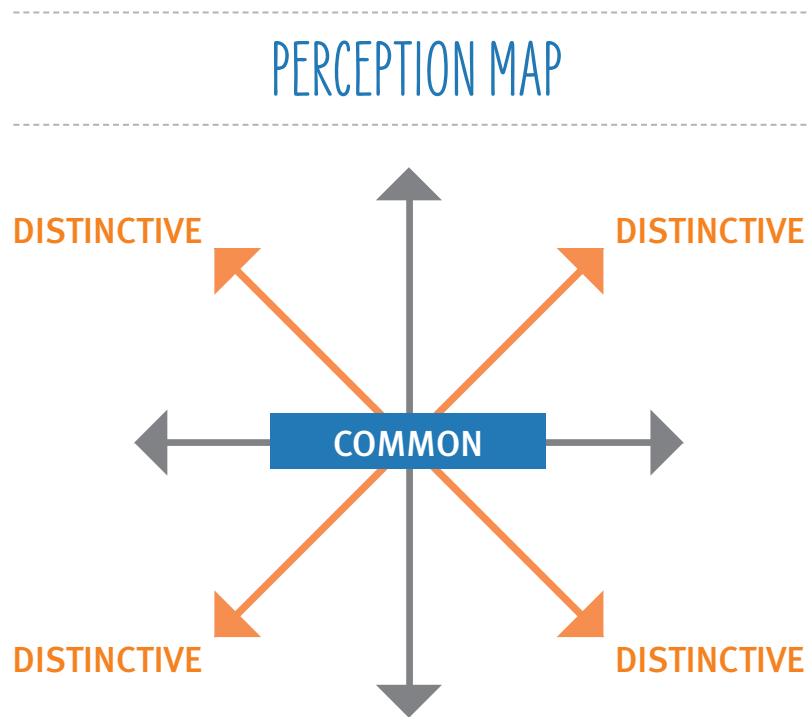
Comparing Elements

The distance that an element falls along an attribute line indicates the degree to which the element is associated with that particular attribute. Elements farther along an attribute line are more associated with that attribute compared to elements closer to the origin.

For example, in the sample perception map provided, Element A (farther from the map's center) is more distinct than Element B. Element A is more associated with Attribute 1 because it is plotted farther along Attribute 1's attribute line (the blue dotted line).

COMPARING ELEMENTS
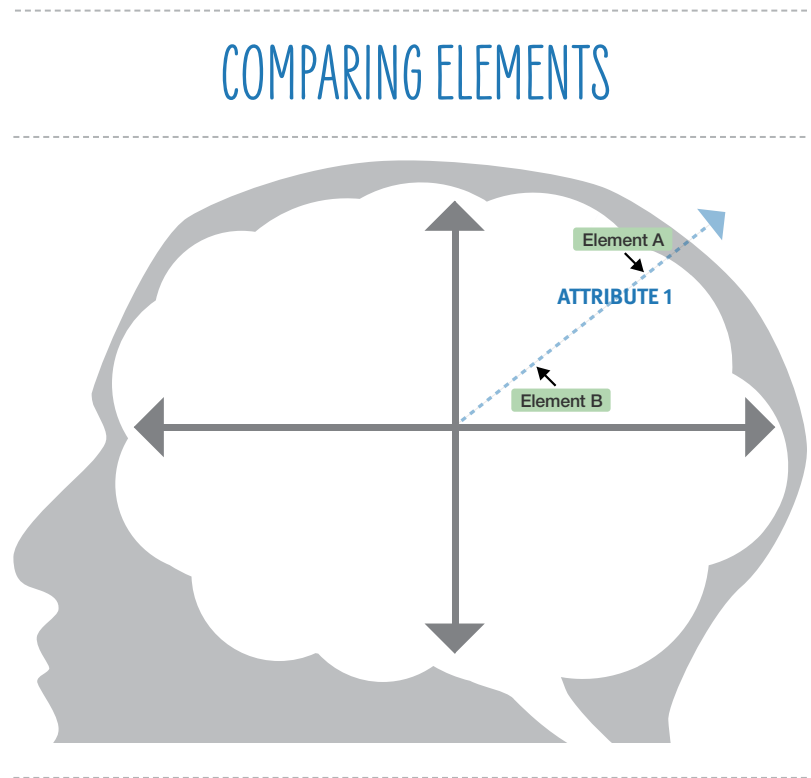
APPENDIX B

OCLC Research Reports

OCLC is a nonprofit membership organization that promotes cooperation among libraries worldwide. Working together, OCLC and its member libraries produce and maintain WorldCat, which now contains over 320 million bibliographic records and more than two billion library holdings. In addition to the many services offered, OCLC funds library advocacy programs that are part of a long-term initiative to champion libraries to increase their visibility and viability within their communities. Programs include market research reports that identify and communicate trends of importance to the library profession. OCLC is headquartered in Dublin, Ohio, U.S., and has offices throughout the world.

Perceptions of Libraries, *2010*, a sequel to the 2005 *Perceptions of Libraries and Information Resources*, explores how changing contexts impact perceptions and behaviors concerning libraries and information sources. The report provides updated information and new insights into information consumers and their online habits, preferences and perceptions. Particular attention was paid to how the economic downturn affected the information-seeking behaviors and how those changes were reflected in the use and perception of libraries.

TO ACCESS THE REPORT, VISIT THE OCLC WEBSITE AT: http://www.oclc.org/reports/2010perceptions.en.html

Sharing, Privacy and Trust in Our Networked World (2007) is based on a survey of the general public from six countries—Canada, France, Germany, Japan, the U.K. and the U.S.—and of library directors from the U.S. The research provides insights into the values and social networking habits of library users, and explores the web of social participation and cooperation on the Internet and how it may impact the library's role.

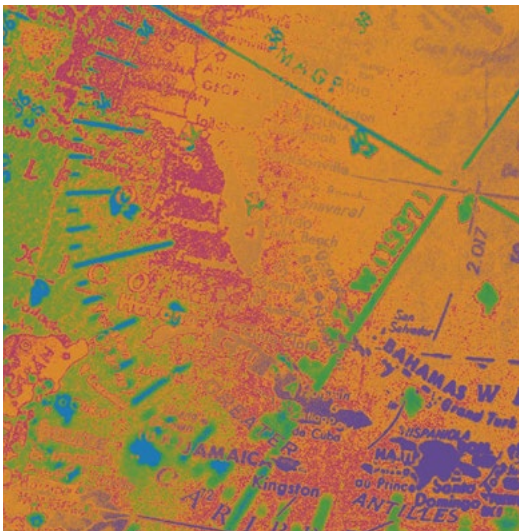TO ACCESS THE REPORT, VISIT THE OCLC WEBSITE AT: http://www.oclc.org/reports/sharing.en.html

OCLC

The Perceptions of Libraries and Information Resources (2005) and *College Students' Perceptions of Libraries and Information Resources* (2006) reports summarize findings of an international study on information-seeking habits and preferences. The study was conducted to learn more about: library use; awareness and use of library electronic resources and Internet search engines; use of free vs. for-fee information; and the 'Library' brand.

TO ACCESS THE REPORT, VISIT THE OCLC WEBSITE AT:
http://www.oclc.org/reports/2005perceptions.en.html
http://www.oclc.org/reports/perceptionscollege.en.html

The 2003 OCLC Environmental Scan: Pattern Recognition was published in January 2004 for OCLC's worldwide membership to examine the significant issues and trends impacting OCLC, libraries, museums, archives and other allied organizations, both now and in the future. *The Scan* provides a high-level view of the information landscape, intended both to inform and stimulate discussion about future strategic directions.

TO ACCESS THE REPORT, VISIT THE OCLC WEBSITE AT:
http://www.oclc.org/reports/escan.en.html

APPENDIX C

Sources Consulted

About our sources

Unless otherwise noted, the data points presented in this report result from the OCLC Market Research team's analysis of the OCLC-commissioned survey results.

Other sources were consulted throughout our research efforts as noted throughout the report; those sources are cited here.

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Marketing examples from MOOC providers in Chapter Five:

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edX: https://www.edx.org/blog/edxs-2nd-birthday-celebration#.U6nRsY1dWIk

TED-Ed: http://ed.ted.com/

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