

2014

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Recommended Citation

Strauch, Katina and Worlock, Kate (2017) "Outsell's End-User Study: Faculty and Students," *Against the Grain*: Vol. 26: Iss. 2, Article 53.

DOI: <https://doi.org/10.7771/2380-176X.6738>

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Outsell's End-User Study: Faculty and Students

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Introduction

The information industry is worth more than \$700 billion and end-users consume this value for either personal or professional reasons.

1,922 knowledge workers responded to **Outsell's** online end-user study, including 429 completed responses in education, (150 faculty, 250 full-time students, and 29 administrators). There are lots of meaty takeaways!

Obstacles to Getting Information

The three major obstacles for faculty are not having enough time or enough budget, and lack of availability of fulltext.

- 57% of faculty say they lack time. Science faculty feel less time pressure than social science and humanities colleagues.
- Lack of budget was highlighted more strongly by science faculty (44%) than humanities and social science faculty (38%).
- Science faculty (31%) found the lack of fulltext more of a problem than HSS faculty (27%).
- Higher education faculty are also concerned with determining the quality and credibility of resources. This is of particular importance in humanities and social science.

Information Types Used

Overall, respondents rated education and training (41%) as well as STM (36%) materials as the most important types of material used for work.

- Textbook content comes out on top in the U.S. K-12 and higher education systems. Community college faculty (87%), followed by K-12 faculty (65%), and faculty at four-year universities (60%) considered textbooks their most important types of content.
- Contrasts between students and faculty: 41% of faculty and only 8% of students picked instructional material as one of their top five choices. Academic journals were picked (37%) by faculty and 20% by students.
- Science faculty rely on textbooks slightly more than HSS faculty (70% vs. 65%) but far less on journals (19% vs. 48%) and not at all on reference content (3% for science faculty vs. 16% for HSS faculty).

Formats and Platforms

Despite the proliferation of tablets and smartphones, desktops and laptops remain the preferred points of access of content used for work. The percentage of users choosing to access content either from a tablet or a smartphone is no more than 10%.

- 79% of faculty prefer to access textbook content in print with this strongest among science faculty (88%) than HSS faculty (79%). Despite their reputation as "digital natives" 86% of students prefer to access textbook content in print.
- 43% of faculty and 25% of students prefer to access journal content in print.
- Given the figures above, the market for delivering educational content via smartphones remains at a very nascent stage of development.

Learning Management Systems and the Library

Both students and faculty (74%) report using LMS with Blackboard the most prevalent. Science faculty and students use their LMS more than HSS counterparts. Students and faculty who use the LMS log in daily with HSS students leading the way. 65% of faculty and students knew that library services were available through their LMS with students more aware of the library presence (74%) than faculty (50%). Science faculty are the least aware (33%). 45% of HSS faculty access the library online weekly as compared to 17% of science faculty.

- Students are much more prolific online library users than

faculty and 41% of students access the library online; there were no significant differences between science and HSS students.

b) The most popular LMS task is submitting assignments (some are mandatory). HSS students are more likely to submit assignments via the LMS while science students are more likely to check grade details.

Purchasing Behaviors for Educational Materials

Textbooks attracted the largest share of spending by both students and faculty. Science faculty spend almost twice as much as HSS faculty (\$388 vs. \$166 per semester). HSS students spend more on textbooks than science students (\$330 vs. \$300).

- Students get textbooks by the cheapest possible means. 67% buy used textbooks. In the future, students expect to buy fewer print textbooks, renting them, or moving to digital.
- 11% of HSS and science students do not intend to buy print textbooks in the future. Both students and faculty (76%) believe publishers charge too much for textbooks.

Spending and Purchasing Information

Respondents were asked about their level of involvement in the procurement of external information resources. Not surprisingly, science faculty have a much stronger role than HSS faculty.

- Faculty are more likely to spend their budgets for their own use. Science faculty report that 11% of buying decisions are outsourced to a library or information center as opposed to 22% of HSS faculty. There may be a disconnect between the type of materials purchased or reported by the two types.
- Faculty members are more loyal to print but they expect to increase their spend on print/digital bundles. **Outsell** predicts a stronger shift to digital in the higher education market than the K-12 and expects this to persist over the next three to five years.
- 55% of total budget is spent on digital content among knowledge workers with 41% for faculty. Print is 19% of the market as a whole but higher for faculty at 36%.
- 70% of faculty expect their digital spend to increase over the next 12 months and only 14% expect their print spend to rise. As more relevant and appropriate digital solutions come to market, spending on ones that deliver on saving institutions money or improving learning outcomes will rise and this will be at the expense of print resources almost exclusively.
- 19% of faculty are cautiously optimistic in expecting an increase in budgets for external content. 68% expect budgets to remain stable and 7% expect a decrease.

Desktops, Tablets and Smartphones

Surprisingly, both students and faculty are behind overall knowledge workers in ownership of smartphones. 86% of knowledge workers own a smartphone compared with 76% of faculty and 80% of students.

- Faculty lead in ownership of laptops, 92% to 79%. 48% of faculty have their laptops provided by their employers.
- 66% of higher education faculty own a tablet compared to 84% of knowledge workers. Tablet penetration of the student user population is only 41%, though 28% plan to buy one in the next six months. In personal budget allocation, students tend to select the laptop/smartphone as the best value.
- Students use their smartphones almost twice as much as faculty and their laptops for more than double the time. Users are also "doubling up," using a smartphone while also using a laptop. Students appear to be staring at a screen of some sort 10 hours a day.
- Conducting research is the most common activity undertaken by almost half of the faculty, followed by preparation and plan-

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ning. There is a clear desire among faculty and end users to access offerings through multiple interfaces at their own convenience. Solely mobile use is not enough given the continuing desire to use laptops and desktops as part of the mix.

Digital Textbooks

A surprisingly high proportion of students and faculty (63%) had never accessed a digital textbook platform though respondents may have been confused by the use of the word "platform." Of the platforms used, CourseSmart was the most popular. The market is clearly beyond the nascent stage regarding digital textbooks and platforms but it is still some distance from widespread acceptance and penetration.

a) **Outsell's** hypothesis about the digital textbook space is that flat replica digital textbooks (PDFs with bookmarking and highlighting capabilities) will act as little more than stepping stones for a more integrated digital future. Whole course solutions such as **Pearson's MyLab**, **WileyPLUS**, **McGraw-Hill Connect**, and **Cengage Learning's MindTap** seem better placed for long-term success. Surprisingly, 39% of users claim not to have used a solution of this sort, though as stated earlier, this may be because of confusion in the use of the term "platform." HSS students and faculty are much more likely than science students which may reflect the bias of packages toward science than toward humanities disciplines.

b) **Outsell** also looked at the use of OERs (Open Educational Resources). 78% of faculty agreed that they recommend OERs in addition to other paid-for digital resources

c) 46% of faculty expect to be using only digital textbooks within the next two years.

d) 90% of students feel that digital textbook content should be cheaper than print.

e) The only area in which science and HSS students differed significantly was around the area of trust of digital materials. 58% of science students compared with 48% of HSS students say that they trust print materials more than digital materials.

f) Despite concerns about price, students value accessibility above everything else. Features like search and multimedia content do not figure very heavily, suggesting that there is work to be done on improving the usability experience in the digital textbook arena.

g) Customization was valued by just under one-third of faculty and anecdotal evidence from solutions providers suggests that faculty who undertake customization is marginal. Nevertheless, offering a customization solution to the market is important even if this option is not strongly taken up.

h) Like students, faculty find digital textbooks more difficult to work with than their print counterparts.

Mobile Apps

When it comes to the number of mobile apps purchased and used, student and faculty behaviors are consistent with those displayed in the wider knowledge user community. Students try to find free apps for both personal and professional reasons. Apps are more likely to be used for personal reasons (44%) than professional reasons (33%). The browser remains dominant when undertaking tasks for work purposes.

Social Media

The use of social media is pervasive among both students and faculty. 100% of science faculty and 95% of HSS faculty who responded to the survey use one or more social media sites. Student usage is also ubiquitous with 98% of science and 97% of HSS students using one or more social media services.

a) Students do not use LinkedIn as much as faculty or the overall knowledge worker community as LinkedIn is a recruitment and career progression tool.

b) Within the faculty community, there was no statistically significant difference in the use of LinkedIn by science and HSS faculty, but there was far greater use of LinkedIn by higher education faculty than K-12 faculty.

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c) The proportion of faculty using Facebook for professional and personal reasons is double that of students, suggesting that networking is between colleagues rather than between faculty members and students.

d) Faculty are more comfortable with social media sites collection and storage of data about their information habits than students. In fact students are more uncomfortable than your average knowledge worker.

Outsell's Essential Actions

Build Products That Save Users Time — Time is a key pain point as is budget so time-saving solutions cannot be prohibitively expensive.

Bear Age in Mind — Higher education faculty are on average older than K-12 faculty. Their reaction to digital take up such as being less likely to have a smartphone or laptop may be a hindrance.

Build for Mobile as Part of a Package — There is a clear desire amongst faculty to use mobile devices for work purposes. This is an opportunity for solutions providers to build mobile interfaces to existing solutions. End users require access to offerings through multiple interfaces at their own convenience.

Mind the Textbook Gap — Digital textbooks are still not igniting the imagination of today's students and faculty. These products have to deliver significantly more value than their print counterparts. It will be vital to look toward institutional purchasing models as a way of guaranteeing revenues and achieving higher sell-through on a per-class basis.

Integrate Reference Content with Other Services — The wealth of high-quality reference material held by solutions providers is being underused and undervalued by student and faculty audiences. Making these services more visible through connectivity with other offerings would bring their value more to the forefront and boost their value to the end-user audience. 🌱