RE-OPENING BRITISH COUNCIL LIBRARIES IN PAKISTAN

In response to the desire to engage with new audiences and understand the changing consumer preferences in Pakistan, REMU circulated an online survey between the 23rd and 29th of July 2014 in an attempt to source information on audience demographics, materials, events and activities, access, and membership.

Preface

The project to re-open the library in Lahore and the creative space in Karachi supports the cultural relations agenda of the British Council in Pakistan. This report is part of our ongoing work into market insights in Pakistan.

The report outlines our new audiences and customer base in Pakistan and analyses their subject preferences alongside other choices including methods of access, types of events they would attend, membership options and pricing. The report also reviews other institutions in Pakistan that have a similar offer and details the global leaders in digital libraries.

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Executive summary

*This project further demonstrated the demand which exists for British Council libraries in Pakistan. It became clear that this demand comes with large expectations that are wrapped in nostalgia. It is crucial that we cater to new audiences and exploit the interest which is present across the country - 72% of people asked are **not** currently a member at a library or cultural centre.*

Furthermore, despite only 67 people saying they are unlikely to be able to visit either library site, 133 people said they would become a member at a linked centre if we opened them in other towns, and many comments requested for a library to be built in Islamabad; this all indicates a huge, untapped customer base.

The most common profile of the 396 people who replied to our survey is a 25-30 year old male student, from a middle class background. This is likely a result of bias in our methodology, but also indicates which strata of Pakistan are interested in British Council libraries. A disproportionate number of respondents recorded themselves as upper-middle or upper class which indicates that the British Council currently engages with an attracts a more wealthier section of the Pakistan population.

When asked what would cause someone to become a member, 73% said the available materials were a very important factor, thus demonstrating the need for interesting and appropriate content. (This was followed by facilities and digital access). As expected the most popular subject area was 'English language and literature' (55%), this remained the top choice when analysed against all other variables. However, when asked how they would like to use the libraries, only 39% would visit to improve their English language skills, ranking 8th out of fifteen given options.

Overall, other popular subject areas were business & economics, (42%) and social sciences & psychology (41%). Respondents from Karachi had a markedly higher interest in Science and mathematics than Lahore (46% compared to 23%). Surprisingly, the topic of exams was shown as the least popular, with just 12% of people selecting it as a subject area they were interested in. This was also seen with our membership options; only 2% would want to register at the library as an IELTS candidate. However, of the other institutes in Pakistan we assessed, a majority found they were busiest around exam time – perhaps more as a study venue.

The main reason people would visit our centres is to access materials in the library (68%), to study or access training materials (51%) or to read magazines and newspapers (47%). Surprisingly, only 21 people were interested in accessing online resources through a loaned device, and fewer showed interest in tablets. This can be explained by the ease of access the majority of respondents have to technology - 89% own a computer or laptop, 49% go online through their phone or tablet, and only two people did not have access to the internet.

97% of people asked would like to access our materials remotely; it was therefore surprising that only 15% were interested in E-books and E-journals. Contrary to our assumptions, the more traditional book lending model was the popular choice; with 31% wanting hard copies of materials to take home, and 16% wanting hard copies of materials to read in the library. When looking at the cities separately, Karachi had a 20% preference to access the materials on computers or laptops.

44% of respondents registered an interest in attending British Council activities and events, despite 31% saying they do not currently attend any. In both cities, 'trainings and workshops' were in highest demand; Karachi showed more evenly spread ratings between the different options and had a significantly higher uptake for English conversation classes when compared to answers from Lahore. Teacher clubs were disappointingly unpopular overall (16%) but only 26 of our respondents were teachers. The most popular frequency for events was monthly, and people would like to participate in events through a combination of face-to-face, VC and online.

Overall the most popular membership was student at 28% (reflecting our sample bias) followed by standard (25%) and Premium lifetime (18%). Lahore had a three percent higher response for premium membership. Most people would be willing to pay up to 500PKR a month for membership which reflects the average membership cost we found in other institutes. However, ninety-nine people chose between 500-1000, and fifty-one opted for 1000-5000 as a monthly membership rate. This likely mirrors the disproportionately high middle and upper class audiences who engaged with this survey. The majority of people would like to pay in a single cash payment, or in monthly instalments.

RECOMMENDATIONS:

Cater to audiences other than students
It is clear that we have a large interest from student audiences, and many libraries we contacted in Pakistan see students as their main customer base. This raises a question around our branding – do we want to follow curriculum, or stay truer to areas which are of interest to the British Council? Consideration also needs to be given to other members; a student majority could be off putting to more academic or corporate audiences, perhaps a separate study area for students or designated revision days may help.

Opening other centres
Once the Lahore and Karachi libraries are established, there is a strong demand for further reach. Satellite centres should be created as hubs linked to the main two libraries. Islamabad has a demand too, with some residents saying they would travel to Lahore to use the libraries materials and facilities.

Outreach programmes
There is a concern that we are not reaching the population that could benefit the most from having access to materials and the internet. Outreach programmes could be developed to spread awareness of our libraries to people who cannot access the internet. Transport could be offered for visits from more rural areas, or books could be ordered and delivered.

Introduction

Legacy and lessons from the region:

British Council Pakistan operated a traditional library in Lahore and Karachi until 2003; this is reflected upon with great nostalgia from many Pakistani's. We have fourteen libraries in South Asia (nine in India, three in Sri Lanka, and two in Bangladesh) which are undergoing an expansion and modernising programme to coincide with the re-opening of the library in Lahore and the creative space in Karachi. A new regional library strategy is being developed to utilise new methods of delivery, support our objective of becoming a thought leader, improve partnerships with government, and reach new audiences.

Pakistan is in a position to learn from experiences in the region and take this new direction forward in a way which will contribute to the Pakistan mission, whilst creating a renewed public presence by meeting the needs and interests of our fresh customers.

Three main lessons arose from discussions with the regional library group;

Subjects beyond SBUs
- India's library model purchases materials and content defined by their SBUs, but other countries in South Asia have found this to be limiting. Sri Lanka saw a sharp drop in membership after they changed their book collection to be more in keeping with our internal departments. The point was made that we need to be clear on who our target audiences are, and have and contacts in a useable database which should be shared between SBUs in country.
- Q – If there is a demand from customers which is not directly in keeping with the British Council Pakistan mission and/or target audiences, will we cater to their needs to increase memberships?

Marketing
- Many countries are facing difficulties with the promotion and awareness building of their new library offer. Bangladesh has further struggles over the naming of their new library. There is often a demand to increase the reach to beyond the city but struggles over how to best achieve this. India has seen membership rates drop since the initial surge of interest facing difficulties with retention.
- Q – How can we change the mind-sets of people in Pakistan who may only imagine libraries in the traditions sense, can we articulate what a creative space can be used for?

Sustainability
- India and Bangladesh both saw an understandable decline in income generation after the first year. Many feel the business targets we're too ambitious and the library head in India is working on rationalising the annual budget aims. We can begin to look more creatively at how to ensure the libraries are financially sustainable. This may include allowing franchises to bid for an onsite location, increasing our activities and events, or allowing companies to rent out spaces.
- Q – If remote access will be heavily utilized in Karachi, how can we ensure the investment into the physical library space is exploited?

Audience profiling:

From discussions with SBUs and by using the demographic data gathered through our questionnaire we have segmented our prospective new customers into four categories: students, teachers & parents, professionals, and remote users. We interviewed one survey respondent[1] from each category to gain a better understand of their motivation, and expectations of a British Council library.

REMOTE USER: Hassan Akhtar

Story: I am currently working in IT Security for a bank in Islamabad. I have an MBA and I have studies Business in the past. My ambition is to further my education in Canada.

Digital: I go online from my laptop for work and personal purposes. I use Facebook, twitter and I also like to read online Business journals.

What would interest you? I would like to to improve my English and IELTS preparation. I would like there to be a wide variety of magazines and newspapers.

How would you use the library? I live in Islamabad but I will be willing to travel to Lahore every weekend, as long as the library hours allow it. Mostly, I will be accessing remotely during weekdays. I hope I can have the full access to catalogues online.

PROFFESSIONAL: Mubina Talat

Story: I am a professor at QUA, I have an MA Phil from Nottingham University, PhD from BZU, and wrote my English Linguistics, PhD thesis on Pakistani English.

Digital: Web-surfing, active in SPELT, Pakistan Teachers Forum, TILLER or Team for Intensive Linguistics and Language Education Research.

What interest you? I have several influences, which I can't all list, but I work day and night to promote all the figures in Hallidayan Linguistics in Pakistan, particularly at Quaid-I-Azam University.

How would you use the library? The British Council can help provide the richest academic and research development resource for students and faculty. This is a need for the whole country.

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[1] (who had given permission to be contacted)

TEACHER: Mohammed Yousaf (34)

Story: I am District teacher in the Educators School in Bawalnagar. I am also one of the teachers receiving training and the Director of Staff Development in my District.

What would interest you? I am interested to see what impact the British Council libraries will have on the wider society. I hope the resources will not just be educational but also provide a wider insight into worldly affairs. I hope this is a place I can bring the class children for a field trip.

How would you use the library? I will mostly use the library to train my teachers and learn from the resources. In the past I have used the British Council libraries to read the newspapers and magazines.

STUDENT: Zain Butt (19)

Story: I am student in computer sciences in Lahore. My background is in pre-engineering. I am a member at my university library but have never been part of any other library. I am very interested to see if the British Council lives up to its name.

How would you use the library? I am interested in British culture, comedy and motorsport magazines. I want the British Council libraries to have a wide remote catalogue that I can access at my university and home. If there is not a book available it would be helpful if there is a request or reserve feature.

PROFFESSIONAL: Catalina Alliende

Story: I am owner and Principal of University College of Islamabad – a registered college with University of London. I have a PhD in Plant Biology from University of Wales and have lectured in Universities in Chile. In Islamabad, I teach one course for the UOL EMFSS programme 'Society and the Environment'.

What would interest you? In my work doing British degrees ...all things British! I would also love to have access to British cartoons, dramas, BBC documentaries and Shakespeare.

How would you use the library? I would like the libraries of the British Council to support the UOL programs and have some of the main books so that our students could also borrow from there and support the independent student.

Digital: I personally still do not have Facebook, but I use internet, email and the UOL gives me access to lexis nexis, Jstor etc. I use whatsapp and I enjoy reading the news from BBC app.

SBUs projected usage:

Prior to the customer survey, each SBU[2] provided details of how their programmes could make best use of the new library spaces and facilities. All of our teams believe the facilities in the new libraries will help their programmes engage with desired audiences which they cannot currently reach. They all also agreed that it would be beneficial for their department to hold activities and events in the library spaces. One colleague noted that "it would create a more professional image to our partners" as the ownership would be vested in the British Council opposed to a partner. A few concerns were raised around event facilities; the space needs to be fully equipped and able to offer catering and transport to accommodation as required. The suggestions below include quotes from the survey responses of relevant subject specialists:

Exams
- **How would your audiences use the libraries?** Exams candidates would want access to past papers and E-books relevant to their studies. They could also register for examinations through the library front desk.
- **What would they want?** Opportunities to network online with an exam board representative from the UK. Students and budding entrepreneurs could have a facilitated space to encourage new business ideas.
- **How could your programme best utilize the libraries?** Exams could use its networks to support the schools offer, we could use the space for conferences or principal forums.
- **Which of your current activities and events could be held in the libraries?** Small one off exams
- *"Textbooks required by students studying in London are difficult to get here. For ACCA and CIMA, we would like the examination preparation CDs. We would like a library in Islamabad too!"[3]*

Education
- **How would your audiences use the libraries?** Teachers would use online resources and courses through the BCSO portal. HE students and VCs would want information or ideas for research.
- **What would they want?** To participate in video conferences among teachers, head teachers, and/or students from Pakistan and the UK. Focus group sessions on citizenship or student led social action projects.
- **How could your programme best utilize the libraries?** We could use the spaces and digital resources to deliver teachers and head teachers training. From higher education and skills; we could place the outcome publications and materials from our funded projects in the libraries. There is huge content generated from our partnerships, policy dialogues, and researches which we could share with our users.
- **Which of your current activities and events could be held in the libraries?** School education conferences, orientations sessions, meetings, policy dialogues and seminars.

English & PEELI
- **How would your audiences use the libraries?** To complete academic research or access online materials. PEELI's trainees would use the book resources for extended assignments and as a reference for the training consultants.

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[2](Unfortunately the society team were unable to give an answers)
[3] Catalina Alliende, Principal, University College of Islamabad

- **What would they want?** To have access to the resources from their schools or homes. PEELI suggests an interest exists in teaching methodology books and personal professional development (PPD) materials.
- **How could your programme best utilize the libraries?** English is looking at increasing its work through media channels, these online resources could be shown to parents and teachers. A digital portal would also support our want to reach teachers in remote locations. We could organise reading days or other activities to improve English language capabilities.
- **Which of your current activities and events could be held in the libraries?** Some of the smaller workshops and PEELI would like to run training events in the library spaces, and use the digital facilities to broadcast their sessions to government venues across Punjab.
- *"We would like books on all aspects of Descriptive Linguistics as well as Applied Linguistics, and access to online resources for our faculty and students in Islamabad."*[4]

Arts
- **How would your audiences use the libraries?** They would look at the library as a prospective venue as well as a centre to receive information and meet relevant peers.
- **What would they want?** To get connected to UK experts in their respective fields.
- **How could your programme best utilize the libraries?** Arts would use the space for policy dialogues, award ceremonies, seminars and visual arts exhibitions (if suitably equipped).

Statistical findings:

The survey was circulated to email addresses provided by our SBUs, displayed on our British Council homepage for one week, and shared on our social media channels. A total of 396 people completed the survey.

DEMOGRAPHICS – who replied to our survey?

Answer Choices	Responses	
Middle class	51.28%	200
Upper middle class	26.41%	103
Lower middle class	8.72%	34
Skilled working class	6.41%	25
Prefer not to say	5.38%	21
Unemployed	1.54%	6
Unskilled working class	0.26%	1
Total		390
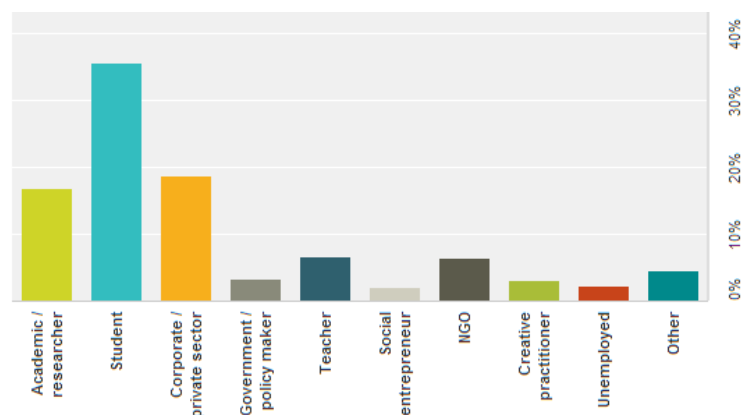
Typical correspondents to our online survey were 25 to 35 year-old males rooting from middle-class homes. The male to female ratio for this survey was 60:40 and over half of

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[4] Prof Mubina Talaat, Chair, Department of Linguistics, Quaid-I-Azam University, Islamabad.

the correspondents identified as middle class and a further 26% were said to be upper middle class.

More than 38% of survey correspondents were 16-25 which corresponds to the most popular occupation choice of being student (36%), this was followed by 19% identifying themselves to the corporate and private sector, and 17% relating to the academic field.

Question nine asked our respondents which library they would be most likely to visit; Lahore, Karachi or neither. Of the 294 people who answered this question, 67 (23%) of respondents chose neither, leaving those able to visit Karachi at 119 (40%) and Lahore at 108 (37%). From a sample of replies to 'neither', the majority were males, aged between 20-30 years, mostly from the corporate/private sector.

Lahore
Lahore's male to female ratio fared better than the overall general result (54:46). Most correspondents were in the 26-35 age groups - an overall older audience than the general survey average.

Karachi
Karachi's gender ratio is almost identical to the overall survey – 60:40. However, Karachi possesses a more diverse range of age groups. For example, the most common age group was 26-30yrs (26%) followed by 16-20yrs (20%) whilst 21-25yrs, remains at only 14% - this would include university graduates.

MATERIALS AND ACCESS

A ranking option was made to establish which subject materials were most popular with survey respondents. On an average of five rankings, over half of the correspondents chose English language and literature (55%) as their preferred study subject. The least popular topics overall were medicine and health (16%) and accountancy and exams (12%).More than 68% of potential library users would like to access these subject materials within the library premises.

Most popular subject areas:
1. English language and literature (55%)
2. Business and economics (42%)
3. Social Science and psychology (42%)
4. History and politics (37%)
5. Science and mathematics (32%) and Schooling, parenting and education (32%)

Highest ranking usages for the library:
1. Reading books in library (68%)
2. Borrowing materials (68%)
3. Studying (52%)
4. Using professional development and training materials (51%)
5. Accessing academic articles (51%)

Preferred devices for access of materials and resources:

More than a quarter of correspondents would prefer taking reading materials home (30%). This is closely followed by those wishing to read on the library premises (16%) and those wishing to subscribe to E-Books (15%).

The digital figures correspond to the 98% of participants who would said they already have regular access to the internet, and could use resources online if they cannot physically enter a British Council library.

How would you like to access the materials?		
Answer Options	**Percent**	**Count**
Hard copies - read in library	15.9%	47
Hard copies - take home	30.7%	91
E- books	15.2%	45
E- Journals	4.1%	12
On tablets - in library	4.4%	13
On tablets - take home	11.5%	34
On computers / laptops	13.2%	39
E-subscriptions	5.1%	15
answered question		*296*
skipped question		*100*

Ranking differences between cities:

From the table below, you can see that the top three subject areas remain the same when evaluated by location. Respondents from Karachi have a comparatively larger interest in Science and Mathematics (double that of responses Lahore). No difference was found for usage, and Karachi shows the only variant in access – with 20% desiring to access our materials and resources on computers or laptops that would be provided by the British Council.

	Subject Area	Usage	Access
Lahore	English literature & language (43%)	Borrowing materials (63%)	Hard copies – take home (26%)
	Science & Mathematics (23%)	Reading magazines and newspapers (17%)	E-books (26%)
	Business & Economics (14%)		
Karachi	Science & mathematics (**46%**)	Borrowing materials (68%)	Hard copies – take home (29%)
	English language & literature (37%)	Reading magazines and newspapers (14%)	On computers or laptops (**20%**)
	Business & Economics (6%)		
Neither	English language & literature (40%)	Using internet on own device (27%)	Hard copies – take home (27%)
	Business & economics (**20%**)	Reading magazines and newspapers (20%)	E-books (27%)
	Science and mathematics (13%)		

SUBJECTS by DEMOGRAPHICS:

We also analysed the subject choices against the demographics answers in an attempt to understand the varying preferences of different audience types.

Subject area (in order of overall popularity)	Gender %		Occupation	
English Language and literature	**Female**	51	**Student** Academic/researcher	36% 18%
Business and economics	**Male**	72	**Corporate/private** Student	28% 27&
Social sciences and psychology	**Female**	52	**Student** Academic/researcher	34% 26%
History and politics	**Male**	53	**Student** Academic/researcher	36% 21%
Science and mathematics	**Male**	72	**Student** Corporate/private	49% 17%
Schooling, parenting and education	Female	**54**	**Research/academic** Student	25% 20%
Popular culture	**Male**	54	**Student** Corporate & Academic	33% 20%
Medicine and health	**Female**	54	**Student** Corporate/private	40% 19%
Accountancy and exams	**Male**	73	**Student** Corporate/private	46% 22%

EVENTS & ACTIVITIES

31% of correspondents said they do not currently attend events or activities at libraries or cultural centres. However, cooperatively most correspondents attended events on an annual (9%), monthly (24%), weekly (24%), fortnightly (6%) or daily basis (5%).

Sample of events and activities our correspondents attend:

"Reading club, book launches, sale of old books, competitions and activities for kids"

"IBA youth entrepreneurship conference, IBA HR conference, "Book the best companion"

"Daily visit to school as a district teacher educator, to mentor, encourage students to involve in activities related to their "student learning outcomes", also has a regular visit to our own
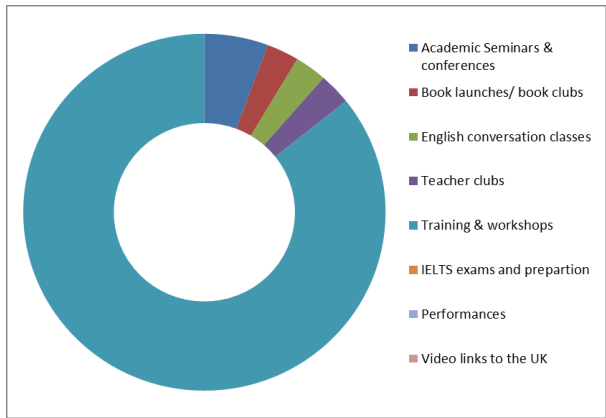
"British Council training activity at PITE nawab shah"
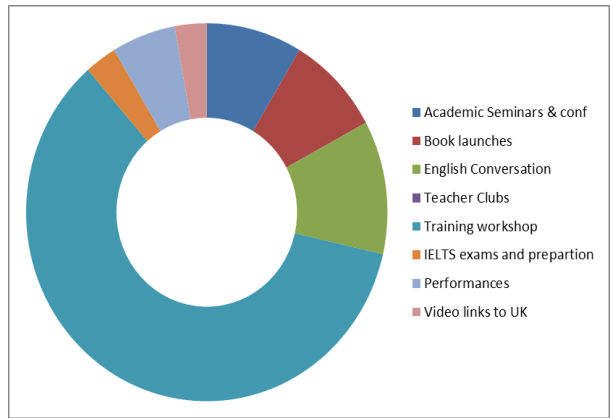
"Library seminars and conferences"

"Educational expo 2014, pet show in park towers, sadequain gallery"

"British Council event in Avari hotel on IT sector"

Lahore and Karachi

Lahore

Karachi

In both cities, it is evident that 'training and workshops' are the most popular choice of events and activities with 86% of correspondents from Lahore and 60% of the correspondents in Karachi. Respondents from Karachi chose more of a variety of event and/or activities, it can also be gathered that English conversation classes have a niche here – holding more than 10% of the sample size.

MEMBERSHIP (Payment methods and Pricing)

All of the library or cultural centres in Pakistan that we assessed (six) have a monthly fee of **0-500 PKR.** We asked respondents to select a membership options which appealed to them and then state how much they would be willing to pay per month for this. The most popular payment method is a single-cash payment, with 49% of correspondents choosing this as their preferred choice. This is followed by payment in monthly instalments at 19% and online payments at 12%.

The single cash payment method also corresponds to the preferred membership of student membership (28%) followed by the standard membership (24%). While there seems to be a clear audience for a premium membership (18%), 79% of correspondents opted for a monthly membership fee between 0 – 1000 rupees. Furthermore, comments such as *"I can't afford, it's my dream to study in UK"* (sic) and *"they should be free of cost for visitors"* reinforce the views that correspondents desire a cheap membership fee with an easy payment method.

Lahore

40% of correspondents in Lahore opted for the Standard Membership followed by 14% of correspondents opting for premium lifetime membership. Over half the correspondents would be willing to pay 500 – 1000 rupees for their chosen package, whilst 23% indicated a preference for a monthly charge of just 0-500 rupees.

Correspondents that opted for the Standard membership were more favourable for the 500-1000 rupees per month costing, and 64% of standard membership correspondents chose this as their preferred choice.

Participants who chose premium lifetime membership, 37% preferred the 1000-5000 rupees per month package; a separate 37% also opted for the 500-1000 rupees per month package.

Karachi

Similar to Lahore, the most popular membership type is the Standard membership (37%). However, unlike Lahore, this is followed by student membership (26%) and premium lifetime (17%).

38% of those favouring standard membership chose 500 -1000 rupees per month. 66% of potential student memberships opted for the minimum package of 0-500 rupees per month. An equal 40% opting for the premium memberships favoured 0-500 rupees per month and 1000-5000 rupees per month.

Neither

The most popular membership option for those unable to visit the Lahore or Karachi libraries in person are as follows:

- Membership type: remote access, student, teacher, standard and corporate
- Price bracket: PKR 0-500 followed by PKR 500-1000
- Payment type: single cash payment followed by monthly instalments

Membership options against costing:

We asked our survey respondents which membership option appealed to them, and then asked how much they would be willing to pay. Italics indicates a membership option that was listed, but not in the original menu of services.

Membership type & proposed cost (in order of popularity)	Responses	Occupation		Selected cost (per month, top three)	
Student membership	28%	Student	84%	**0-500**	**58%**
				500-1000	35%
				1000-5000	8%
Standard membership – 1500PKR per year	25%	Corporate/private sector	29%	**500-1000**	**44%**
				0-500	36%
				1000-5000	19%
Premium lifetime	18%	Academic/ researcher	27%	**1000-5000**	**40%**
				500-1000	31%
				0-500	23%
Remote access only	12%	Corporate/private sector	24%	**0-500**	**42%**
				500-1000	36%
				1000-5000	18%
Teachers resources – 500PKR per year	9%	Teacher	48%	**0-500**	**74%**
				500-1000	23%
				1000-5000	4%
Daily rate	3%	NGO	33%	**0-500**	**44%**
				500-1000	33%
				1000-5000	22%
Corporate rates – 10% discount for groups of 10 or more	2.8%	Corporate/private sector	38%	**0-500**	**50%**
				500-1000	25%
				5000-10,000	13%
IELTS candidates – free (exams to pay 500PKR per user)	2.1%	Student & Corporate	33%	**500-1000**	**67%**
				1000-5000	17%
				0-500	16%

Competitor analysis

Global leaders of digital libraries:

This section contains a general review of some of the unique features of the leading digital libraries around the world.

World Public Library [5]

- On the home page it has a tutorials section, which displays short videos (3-5mins) explaining how to use the digital library and download e-books.
- This particular websites charges only $9 annual fee to access over 2 million books/articles/comics/journals.
- It uses a simple interface where homepage has a number of sections (Daily Picks, Featured authors, featured titles) to attract users.
- There is a section titled 'get published' which allows authors to publish their work own work on the website.

Tutorials could be a useful tool for many first time users as most users in Pakistan are not familiar with the concept of a digital library and how to make full use of its facilities.

The self-publishing service is quite unique in the sense that it allows authors to publish their book on the digital library free of cost. Those authors, who cannot bear the costs of getting their book published via a publisher, can use this service so their work can reach a larger audience. This also helps the website collect, and therefore advertise, access to a large volume of content.

Texas Digital Library (TDL) [6]

TDL is a consortium of higher education institutions in Texas that provides shared services in support of research and teaching. Therefore members of libraries of these institutes have free and open access to information from other libraries.

- They have free trainings for members which are online (webinars)
- TDL offers a number of unique services to its members such as online conference management, Support for publishing fully online, peer-reviewed journals, create TDL WordPress sites.
- Another service called Vireo allows research students to submit their thesis & dissertation for other members to read and comment on.

TDL is a member oriented digital library which is primarily catering for the member institutes (Universities) and their students and faculty. TDL works as a central management tool to bring all the information together and provide it to a bigger audience within the same field.

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[5] http://worldlibrary.org/default.aspx
[6] http://www.tdl.org/

The British Council libraries could form a similar consortium with top universities of Pakistan (LUMS, NUST, IBA) and have a structure similar to this where Pakistani students and faculty could have access to research papers and journals from Pakistan and from the UK. At this point in time, it is difficult to get such information, as there is no easily accessible or centralized portal where research is collected and shared.

J-Stor [7]

This library primarily caters for University students and faculty, is well known globally and highly used in the UK. There is free content available, but generally universities pay a premium to allow its students and faculty to access the material from their Universities network.

- The free journals and research papers are mostly 3-5 years old. Access to new journals is charged.
- Individuals can also sign up by making a payment and will get an online, library card – J-Pass – It allows to them unlimited access to reading materials online and limited downloads per month.
- For free registration, individuals have their own 'J-Stor Shelf'. You may have up to three items on your shelf at any time, for as long as you need. An item must stay on the shelf for a minimum of fourteen days before it can be removed and replaced with a new item. Thus ensuring limited access.

British Council Library can use similar model for individuals who will use digital library. Access certain publications could be given for free, with other research and downloads limited to members, or pay per copy. This could also be used as a platform to advertise the physical library facilities and options in Lahore and Karachi to improve membership uptake.

Libraries and cultural centres in Pakistan:

KARACHI:

	The Second Floor	Karachi Gymkhana (KG) Libraries	Institute of Business Administration	Pakistan American Cultural Centre	Alliance Francaise
Demogr aphics	Open for all ages /to all of Karachi. disadvantage is in terms of the location (Defence area) which naturally excludes some people	Children's library for 7-13 year olds; content for 2-3 year olds is also available Adult library for above 13 year olds with special section in front for 'senior members'	City and Main Campus libraries both temporary; new ones under construction Only students and faculty members are allowed to visit	Only students (around 2000 overall including both morning & evening shift) can access the library resources Revamping their system	Students & anyone else who walks in can borrow books Proper membership system for library is not operational yet because of no

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[7] http://www.jstor.org/

				after which members will have access	full-time person in charge of library
Materials & Access	A book store (2 shelves full of books on ground floor) from

In the cafe on the first floor, there are selected books and articles for the purpose of being read only - no take home system | Books for children, dictionaries etc.

Books, magazines, audio tapes, online reference section

Read/Use in library or take home system

50-100 members visit every day | Intl. & local books, periodical & e-books

Read/Use in library or take home system | Books, newspapers, 2 computers and audio tapes with recorders

E-resources include access backed by/to American International Resource Centre | N/A |
| **Popular subjects, events and other points of interest** | Entertainment (classics) and academia (science, business)

Qawwalis are the most popular followed by Art exhibitions and Musical shows

- No. of daily visitors is sporadic; busy for exams in Jan-Feb

non for-profit organization

 Open art gallery, 'Frar' shop, and a study area | Fiction, classics history, and unique subjects like ACCA, CSS.

Involved with most of the events like Art & Writing competitions for children

Computerized data management system

Has linkages with Lahore Gymkhana- facilities can be availed with issuance of a letter

Latest materials are added as per member suggestions | Society events do not fall in libraries' domain

New libraries will have a modern structure as students learnings style has changed

Hard copies + digital libraries are now 'learning commons' to allow for complete research | Stand-up comedy, theatre, musical events

Leadership training

Backed by American Consulate (provides resources)

Other facilities include: Language courses, activities like yoga & swimming, computer and tuition

Currently a summer camp for children is underway | Art exhibitions (e.g. 6 local painters exhibited recently)

 language workshops, concerts (Western and traditional)

shows on FM Radio and Cine Club (French movies with English subtitles)

Urdu workshops, book store, Music & Photography classes

Plan of summer camp for 3-5 and 14 + |
| **Membership** | There is no membership

No book borrowing

Entrance fee charged for the events ranging | Each member is given 6 book tokens per month

40PKR charged per month irrespective of borrowing

25 days limit for | Initially a separate library card was issued however now only student's / faculty member's IBA ID is needed | Only students can use resources

Life, Annual and Associate members

Open to any | 1. General membership: Suitable for families - 200 PKR deposit and 200 PKR annually

2. Government |

from 50- 500PKR T2F collaborates with artists, musicians etc. for events to take place	borrowing books with 3PKR change per day of delay of 50 PKR charge for damage/loss	Alumni card will be developed in future	citizen of Pakistan or the U.S.A, 18 years or older. Any person who is not Pakistani or an American is eligible to become an Associate Member	schools: Free membership. 3. Outreach programme membership: Free.

LAHORE:

	Quaid-e-Azam library	Children Library Complex
Demographics	University students, 16+, CSS exam contesters (below 35)	4- 14 year-olds, families. Complex are trying to extend to 18+
Materials & Access	Foreign and local book journals Limited access to online journals for general memberships. If member is a LUMS student they receive full access at the library and remotely 30 Desktop computers and photocopy machines WIFI available throughout the library	100 new desktop computers. Air-conditioning in new part of the library
Popular subjects, events and other points of interest	English literature, Management, Law and Politics CSS exam materials Lectures, seminars, launches, book days Library is funded by private donors Approx. 300 daily visits a day from 8am-8pm	Natural sciences and Geography Activities are very popular in this complex for libraries. Activities include; summer schools, sports, reading classes Library funded by the Punjab Government The Library has several outreach programmes aimed at local Government schools Approx. 400 daily visits by families
Membership	1. General membership: Open to all graduates. Deposit of 500PKR and 300PKR annually 2. Student membership: A deposit of 500 PKR and 100 PKR annually 3. Lifetime membership: A one-off payment of 10,000 PKR 4. Casual membership: a deposit of 200 PKR and 100 PKR per visit	1. General membership: Suitable for families - 200 PKR deposit and 200 PKR annually 2. Government schools: Free membership 3. Outreach programme membership: Free

Conclusion

In summary, the major findings are as follows:

• **Demographics** - The typical correspondents were 25-35 year old males belonging to middle-income households and were mostly students and that part of the corporate and academic world. The Karachi, and neither Lahore nor Karachi respondents, were younger than the Lahore correspondents and were more diverse in terms of their employment. Males were the primary respondents in all cases.

• **Materials and access** - The top five subject areas overall were English Language and Literature (55%), Business and Economics (42%), Social sciences and psychology (42%), History and politics (37%), Science and mathematics and Schooling, parenting and education (32%). English language and literature is the most popular subject area in the case of Lahore and Neither Lahore nor Karachi and it is the second most popular in Karachi. There are slight differences in the three cases with respect to the rest of the popular subject areas. Overall, the top 5 usages of the library are Reading books in library (68%), Borrowing materials (68%), Studying (52%), Using professional development and training materials (51%) and Accessing academic articles (51%). Lahore and Karachi respondents both opted for borrowing materials and reading magazines and newspapers as the top two usages however the top usage for neither Lahore nor Karachi respondents, was using the internet via your own device. The preferred devices for access overall are hard copies – take home followed by hard copies – read in library and E-books (corresponds with 98% figure demanding remote access). This finding is similar in all cases except the Karachi respondents prefer computers/laptops as well.

• **Events and activities** - Overall respondents do not currently attend events and activities (31%) at libraries or cultural centres and if they do, it is usually on a weekly or monthly basis (24%). The most popular events and activities are Trainings and workshops in all cases (Karachi-86%, Lahore-60% and Neither-73%) however there is demand for English conversation classes by Karachi and Neither respondents. The most preferred participation type overall is a combination of face-to-face and online (50%).

• **Membership** - The most popular payment method overall is a single-cash payment (49% and followed by monthly instalments and online payment). This corresponds with the most preferred membership type that is student membership (28%) followed by standard membership (24%). Remote access is demanded by the neither Lahore nor Karachi respondents. While there seems to be a clear audience for a premium membership overall (18%), 79% of correspondents opt for a monthly membership fee between 0 – 1000 rupees per month.

Annexes

Research methodology:

This market research project came out of a need to understand who are new audiences are and what they would want from the British Council library in Lahore and creative space in Karachi. The methodology was constrained by limited financial and human resources, we therefore opted for an online survey through Survey Monkey in hope to reach a larger sample size more easily.

All SBU leads were asked to provide ideas on how there programmes would best utilize the new libraries, these suggestions fed into the choices given on certain questions of our survey. The developed questionnaire was shared and approved from SBU leads and wider colleagues before publication.

The survey link was advertised on our British Council homepage and shared on our social media channels, using a prize draw as an incentive (see below). This was also a great way of promoting the reopening of the libraries and we received many positive comments on our Facebook page. The other method of survey circulation was individual emails – each SBU provided of details of over fifteen subject specialists, and exams gave us access to their candidate database. Personalised email invites were shared using mail merge.

We received 387 responses from the website link and only 9 responses from the emails. Unfortunately, as Survey Monkey allows participants to skip questions, only 285 people of the total 396 gave an answer to every question. To look for any variance by city, we separated responses to Q9 (Whist library are you most likely to visit?) A random sample of 22% (fifteen responses) was taken from the 'neither Karachi nor Lahore' responses to present the responses as a separate identity that would indicate a trend for other locations.

For the audience profiling, we first categorised our customers into four types and then contacted people from each group randomly from those who had selected the option on the survey and given their email. A structured phone interview aimed to get a feel for why and how they would engage with our libraries.

The competitor analysis section was largely completed by desk based research, site visit were also used where possible.

Limitations: The main limitations of this methodology relate to the sampling. Firstly, the sample size is smaller than desired; this is likely due to the way in which we circulated the survey. Though more time consuming, it may have proved better to target different demographic groups in different way. People whose contact details our teams know, or audiences who are already viewing our homepage and/or social media channel, are clearly already engaged with the British Council. Although these people will form part of our target audiences, it is far from representative of potential customers in Pakistan. As the survey was online, it is unsurprising that 99.9% of responders have regular access to the internet – we excluded potential audiences from adding their view. We also had replies from a majority of students; this again may come from the digital channels we chose. Though it would be very hard to quantify, we also feel that some colleagues completed the survey – this clearly will skew the results.

Competition mechanism:

To maximise the response rate to the online customer survey, British Council Pakistan will introduce the incentive of winning a Tablet for one participant who has completed the questionnaire. All respondents will be informed that if they wish to be entered into the prize draw, they need to provide an email address which will be temporarily retained. An opt-out tick box will also be available for participants wishing to remain anonymous.

All entries wishing to take part in the competition will be exported onto an Excel spreadsheet. If this is not possible, the names will be manually entered to ensure a completely random participant is selected. By using the Random Function (see figure 1), Excel will be able to produce a number between one and the total number of entries. Excel will generate a random number which will correspond to a single name (see figure 2).

The winner will be contacted by email and have a certain time to respond (to be agreed and stated in the terms and conditions). If the participant does not respond within this time, a separate winner will be chosen using the same method.

The Tablet will be held in Islamabad and posted to an address provided by the winner. The winner will be announced on Facebook for publicity of the library project. Staff of British Council Pakistan will be unable to participate in this competition.
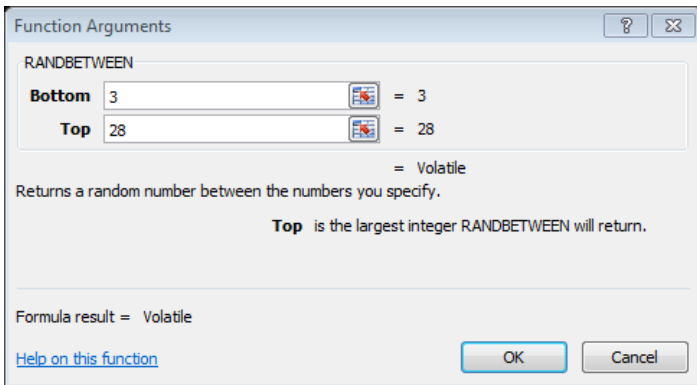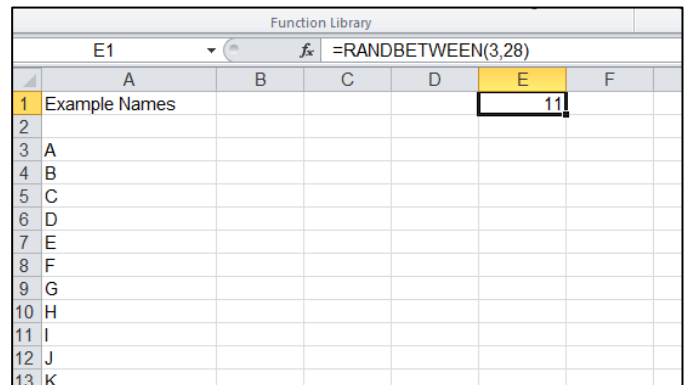

Figure 2: Random Function Argument

Figure 2 Generated random number

← Advertisement

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