



E-books in the academic library market in 2009
Or why is it not easier to turn the page?

Results of a survey completed by Publishers Communication Group

October 2009

Following their 2008 study¹ on American librarians' views of e-books, Publishers Communication Group conducted a new survey in 2009 in order to probe for additional information and gain a deeper understanding of their opinions. The new study was broader and introduced new questions which aimed to not only capture librarians' attitudes towards e-books but also to gain some perspective on the end-users' experience.

E-books are gaining popularity at a relatively rapid pace these days and the latest mobile devices have provided new avenues for customers and publishers alike. The 2008 findings showed that e-books had great potential in the library market but that supply was not meeting demand – or at least practical expectations – yet. More than a year later, are librarians still expressing similar concerns or have they come closer to working with publishers on solutions that work for all the players involved in this chain?

The results presented below aim to answer these questions but also to gauge the impact of e-books on libraries' workflows and budgets; to better understand librarians' perception of the current e-book offerings and of their patrons' experience; to learn more about their preferred purchasing models and subject areas.

METHODOLOGY

In February and April 2009, Publishers Communication Group telephoned 119 academic librarians in the US who have experience dealing with e-books. Academic institutions were randomly selected to ensure representation from the main Carnegie Classifications and all geographic regions. In addition, all the respondents in this sample are currently purchasing e-books. To supplement this data, 111 librarians participated in the same survey online. The results in the following report include answers from the 230 surveys completed overall.

The sample was selected based on the 2007 Carnegie Classification list and institutions were classified by the CC2000 field. The breakdown of institutions contacted by classification is as follows:

- 24% Doctoral/Research Universities (Extensive and Intensive)
- 30% Master's Colleges and Universities (I and II)
- 23% Baccalaureate Colleges (Liberal Arts and General)
- 16% Associate Colleges and Specialized Institutions
- 7% Not provided

During interviews with librarians, e-books were referred to in general term encompassing electronic monographs, textbooks and reference works. Names of service providers were not probed for and occasional mentions are not included in the results. Librarians responded to a series of eleven questions including a mix of multiple choice and open-ended probes. The respondents held positions within the library such as Collection Development or Electronic Resources Librarian. The complete questionnaire is included in Appendix A.

¹ http://www.pcgplus.com/Newsletter/Issue10/E-Book_Survey_Results.pdf

KEY FINDINGS

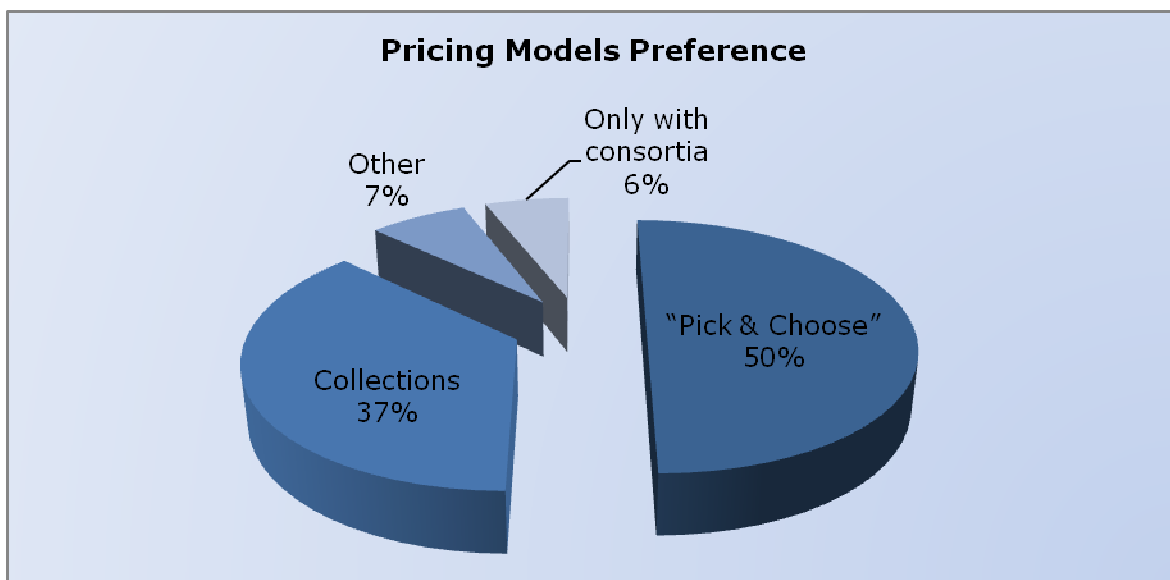
- 60% of the libraries surveyed do not expect to cut their spending on e-books in 2010 in spite of the current economic context.
- Titles in the areas of reference, STM and business remain the most popular for e-books.
- "Pick & Choose" models and front list titles are largely preferred by librarians.
- This year, librarians are particularly cautious about duplicating content in multiple formats: 72% will not buy a book in both in print and electronic form.
- Internal challenges and workflow changes cannot be underestimated and only 7% of the libraries in this study have a formal migration plan in place.
- Librarians and end-users are adapting to e-books, but technology and practical issues are creating a learning curve for everyone involved.

RESULTS

Purchasing Preferences

- **Pricing Models**

Exactly half of the librarians surveyed expressed a strong preference for the "Pick & Choose" pricing models which give them the most flexibility when they make their selections. Just over one third preferred the collection models (by subject or multidisciplinary), which many saw as an opportunity to gain access to titles they may not otherwise be aware of. This model also implies that libraries can at times be forced to buy titles they do not need. Generally, an additional emphasis was placed on their preference to negotiate deals for collections through a consortium in order to benefit from deeper discounts. However, it was interesting to see that more librarians currently purchase their e-books by collection or platform (158 and 102 respectively) than on a title-by-title basis (113).



- **Front list vs. Back list**

Librarians' preference for developing their front list collections was also clear this year: 3 in 4 respondents indicated that they spend at least 70% of their e-books resources on front list titles, while only 9% spend more than 50% on back list content. It is also worth noting that 15% solely acquire recent e-books and allocate no funds for older titles. In 2008, similar preferences were expressed, even though librarians acknowledged in both surveys that their decision is in part based on the subject area in question.

- **Subject Areas**

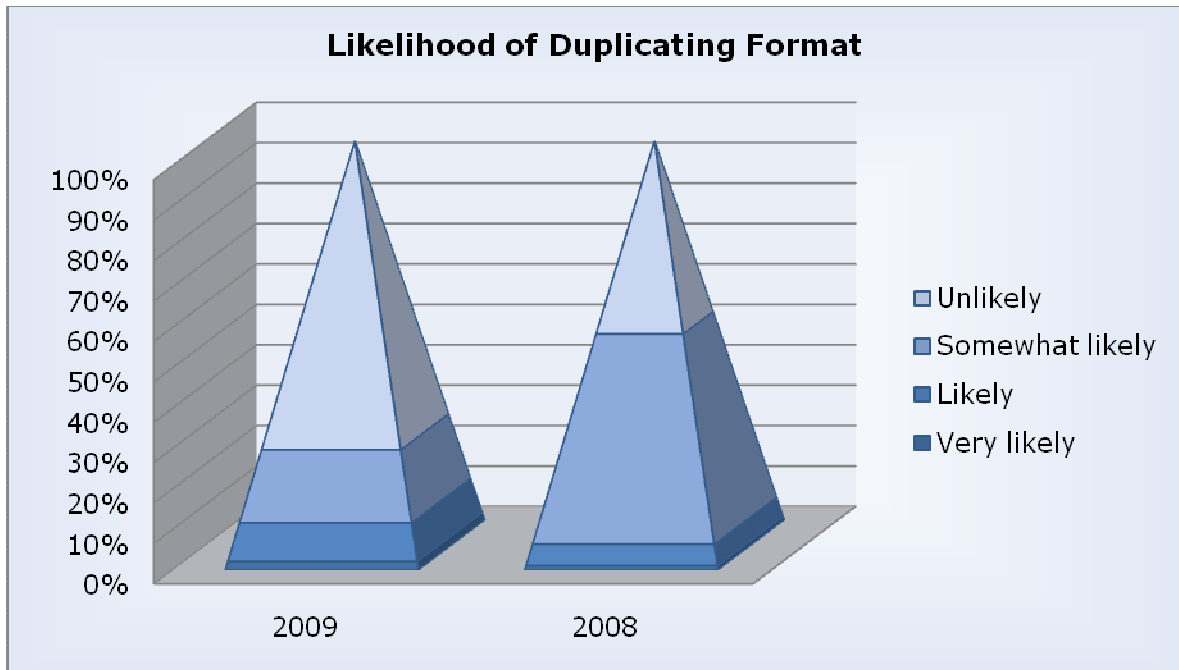
Echoing the findings from 2008, librarians largely felt that the e-book format was most practical and sensible for reference titles, STM, business and computer science monographs. Social sciences and humanities were mentioned as well but to a much lesser degree and several librarians commented on the fact that the options are simply not available as much as in STM. The necessity to access time-sensitive information and the fact that researchers in the STM fields already conduct most of their research online are probably significant factors behind the ranking in the table below.

Table 1. Top 12 Subject Areas Most Suitable for E-Books

Subject	Number of mentions in 2009 (n=230)	Number of mentions in 2008 (n=100)
Reference	59	33
Science	54	23
Health sciences	54	14
Business	39	14
Technology	33	-
Computer science	29	18
Social sciences	15	12
Education	13	4
Religion	13	-
Psychology	12	3
History	10	2
Humanities	7	6

- **Print vs. Electronic**

As shown in the graph below, an important shift occurred during the 12 months between the two sets of interviews. Last year, the majority of librarians indicated that they were likely or somewhat likely to buy a copy of a book in print even if they had electronic access to it (6% and 45% respectively). However this year, an overwhelming 72% of the respondents said that they would no longer duplicate access to book content in multiple formats. This shift can be linked to the current economic crisis librarians are forced to deal with given the most recent budget cuts they endured. The shift can also be partially attributed to their increased level of awareness and comfort with e-books.



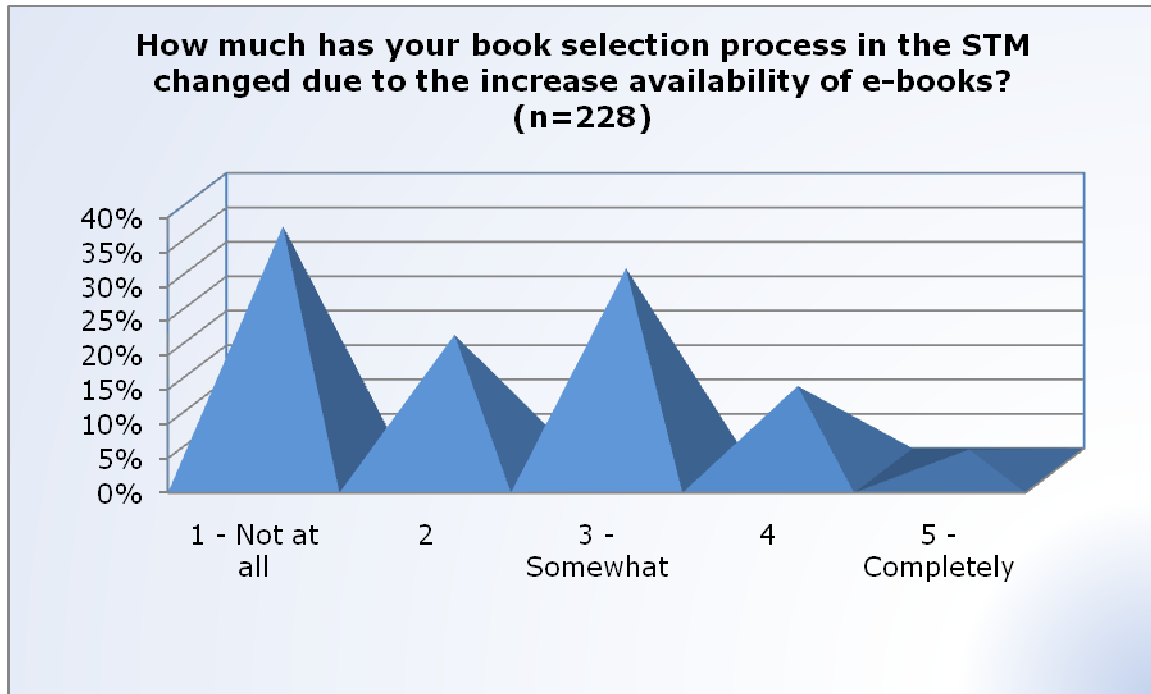
Impact on Workflow

- **Migration Plan**

Last year’s feedback shed some light on new challenges librarians had to deal with when working with e-books. From the selection process to cataloging and dealing with vendors, their workflows need to be adjusted to accommodate the differences in dealing with the electronic form versus a print book. This year, we asked librarians how much these adjustments had impacted them over the last few years. We found that only 7% had a formal migration plan already in place. An encouraging result was that all Carnegie Classifications were represented in this small sample of libraries. From our conversations, we can understand how librarians are simply still ironing out their procedures before implementing a formal plan.

- **Selection process**

As shown in the graph below, the selection process for STM books is still fundamentally the same even though it needed to be adapted to match requirements set by the new format. Subject selectors are still involved but they now also need to coordinate more with their Electronic Resources colleagues. Some vendors also still offer the flexibility of approval plans even if the steps need to be tweaked. Respondents felt that the selection process itself changed a little or somewhat, but that actual workflows following the decision to order a book had evolved more significantly.



- **Internal challenges**

Reports of internal challenges are numerous as libraries set up their new workflows, but it is worth pointing out that 21% of the respondents indicated that they had no new problems because of their adoption of e-books. However, concerns over the quality and consistency of MARC records or license agreements terms on fair use, ILL, electronic reserve or perpetual access are very present for the great majority. Moreover, DRM restrictions create new roadblocks by placing limits on basic functions such as printing, copying and pasting or saving chapters on an external drive.

Further concerns stem from the difficulty of finding funds for e-books: not only because of existing budgetary restrictions, but also because of the occasional lack of support from other departments or the faculty. Allocating funds from another part of the budget becomes a question as well.

From a technological standpoint, the lack of consistency across platform, the occasional need to install proprietary software, the untimely announcement of a new edition or the inconsistency in usage statistics data provided create frustrations. Finally, the fact that electronic books may at times become available after a print copy, or be more expensive raises questions about the supply chain in general.

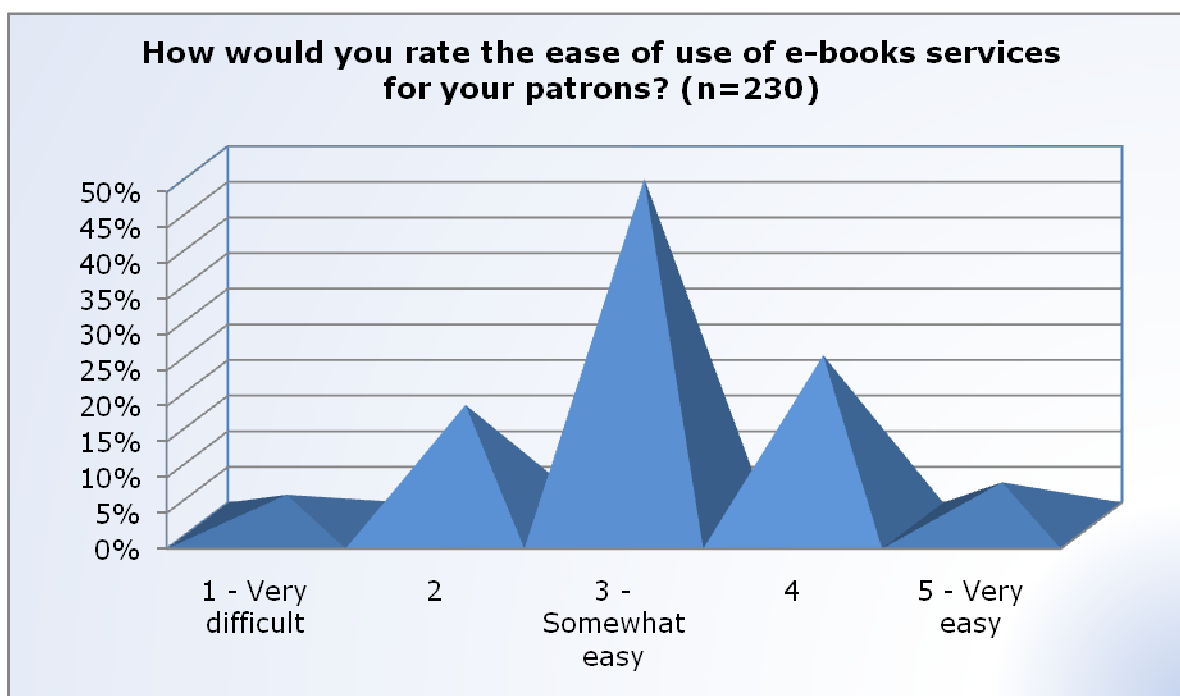
Librarians are willing to adapt and redefine their workflows but do also expect publishers to deliver a more user-friendly and standardized range of product.

End-users experience

E-books do not introduce any new technology, but they do require a certain shift in research habits. Most people are not used to reading more than a few pages on a computer screen, nor are they comfortable doing so. Librarians also find it challenging to explain existing concurrent use limitations or to direct users to the right place on their website to make full use of available resources. With so much content already in electronic format and so much

research already done online, wouldn't end-users adopt e-books right away? As shown in the graph below, the adoption is not as smooth as we might expect: librarians indeed report that only 30% of their patrons find e-books easy or very easy to use.

The increased availability of additional content 24/7 remotely is most appreciated, but technical difficulties generate a learning curve for end-users, which in turn negatively impact usage statistics. The main difficulties come from the lack of consistency between the different platforms and search functions. The lack of robust MARC records also impact end-users by making e-books less discoverable in the library's catalog. Finally, DRM restrictions have the most practical impact on end-users who do not always understand the limits set for them.

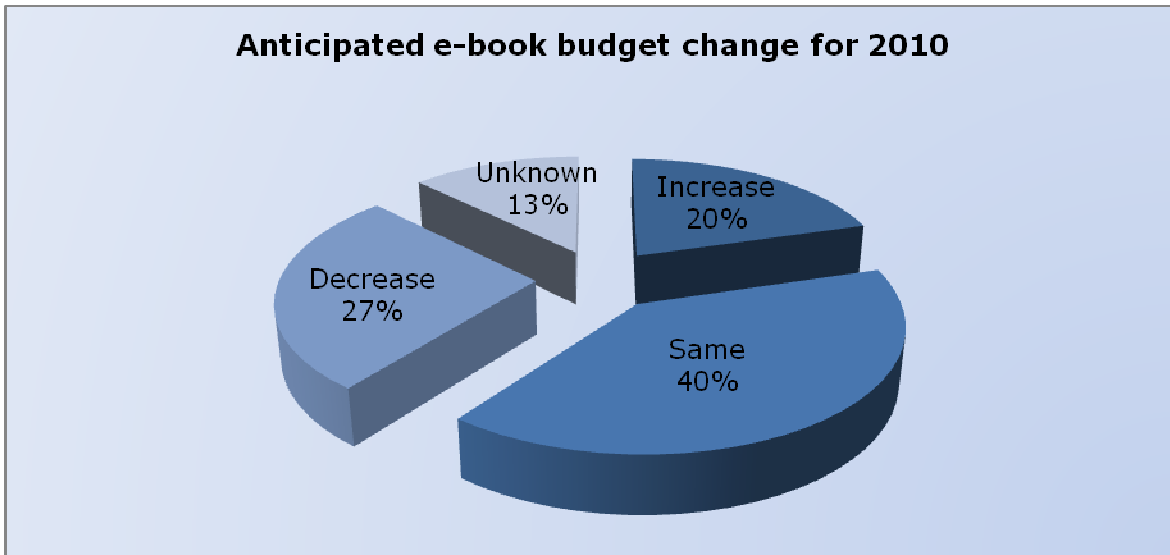


Opportunities for publishers and librarians

- **Available budget for e-books**

Libraries around the world are very affected by this economic context and these are challenging times to expand a collection. However, given the current situation, it was encouraging to hear that 40% of the librarians interviewed anticipated maintaining their level of spending on e-books in 2010. 1 in 5 librarians even anticipated an increase in their e-book budget compared to this year (15% on average). It is important to note that these figures do not usually result from a budget increase, but from a re-allocation of resources across the different areas. With the increased need to serve a growing community who uses the library remotely, the shift of resources to electronic books is becoming necessary.

Anticipated e-book budget change for 2010



- **Faculty support**

As publishers continue to develop user-friendly platforms, the support from faculty and students for e-books will continue to increase. While a certain learning curve does exist with e-books, the benefits of 24/7 access to a wide range of resources increasingly outweigh the disadvantages. In fact, one third of the respondents have reported an increase in faculty requests for e-books in the last two years.

- **Publisher offerings**

Publishers are also making a lot of effort to listen to librarians' concerns and are adjusting their business models and workflows from print to online as well. Their position in the supply chain is changing, but they are attentive to the new services they need to offer to meet their customers' needs. As technology improves and standards become more uniformly adopted in the industry, both librarians and publishers benefit from this collaboration during what is clearly still a period of transition.

CONCLUSION

This overview of e-books in the American academic market presents a mixed picture, but also many opportunities for both publishers and librarians. While demand exists, particularly in reference and STM, so does a clear need for more standardization in delivery and practices across the industry. The technology has not met the librarians' needs yet and several practical issues need to be addressed before book collections can shift the way journals did. While the journal model can not exactly be replicated, it does provide valuable examples of what libraries need in terms of licensing, technical and cataloging requirements.

Libraries' goals to support researchers at their institutions and to make relevant, high quality content available to as many patrons as possible position them as a prime market for e-book publishers. However, the current adoption of this offering would be enhanced by promoting more dialogue between the different parties to address users' needs as well as the libraries' challenges. To do this, we need to use these findings to work on solutions and refine offerings that satisfy both the suppliers and buyers.

Appendix A

PCG E-Books Survey Questions

Q1) Are you currently purchasing any e-books?

- If yes,
 0. Singly? Collections? By platform? By aggregators?
 1. Do you have a formal migration plan?
- If no, why not?

Q2a) By what percentage do you anticipate your budget for e-books for 2009 to change compared to 2008?

Q2b) If a decrease, is it due to recent budget cuts?

Q3) Have you seen an increase in requests for e-books from your faculty in the last 2 years?

Q4) Which purchasing model do you like the best? (subject collections, pick and choose, token access)

Q5) What proportion of e-book spending is going towards front list vs. back list?

Q6) If you buy a book in electronic form (either singly or from an aggregator), how likely are you to also buy it in print?

Q7) How much has your book selection process in the STM changed due to the increased availability of e-books? (rate from 1-not at all to 5-completely)

Q8) Which subject clusters do you find to be an attractive and/or sensible purchase option for your library?

Q9) How would you rate the ease of use of e-books services for your patrons? (rate from 1-difficult to use to 5-very easy to use)

- If 1 or 2, which challenges in particular have deterred you from ordering them for your patrons?

Q10) What do you see as advantages and disadvantages of using electronic books from your patrons' perspective?

Q11) Internally, what do you see as challenges when purchasing electronic books for your library staff?

About Publishers Communication Group, Inc.

PCG was founded in 1989 to help European publishers gain exposure in the North American marketplace. PCG's aim was to direct publishers to the gateway of North American libraries and the goals they could achieve. Our services quickly expanded to include the needs of North American publishers and our focus shifted to the global library community. Our work has become more intricate and involved, allowing PCG to provide comprehensive marketing services that expand and maintain publishers' presence in the world's libraries.

PCG now offers an extensive range of specialized and comprehensive marketing and research services, customized to meet the needs of scholarly and professional publishers. All of our services, tailored to meet specific goals, can be implemented in conjunction with one another or independently.

Our *Market Intelligence Services* are designed to uncover the valuable market information that is not available from other sources because each campaign addresses the unique issues and concerns of your organization.

PCG's *Promotion Services* expand the awareness of your publications or products to a carefully identified and strategically compiled audience, encouraging them to initiate a subscription or expand their current holdings.

Maintaining an office in another country is expensive and difficult to manage. PCG's *Representation Services* offer programs to publishers worldwide that will minimize costs and provide customers with easy, direct contact with you. Take advantage of our global presence and ability to provide this valuable service in North America, Latin America and Europe.

PCG is a division of Publishing Technology, www.publishingtechnology.com.

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