E-books in the academic library market in 2009

Results of a survey completed by Publishers Communication Group

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Overview

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- Results
  - Purchasing preferences
  - Subject areas
  - Librarians’ and End-users’ perspective
- Librarians’ wish list
- Q&A
About Publishers
Communication Group

- Consulting group based in Cambridge, MA and Oxford, founded in 1990

- International staff of 24 with either a publishing or library background

- Offers sales, marketing and research services for publishers

- Works with over 30,000 libraries around the world
Survey Methodology & Scope

- 230 librarians in the US interviewed over the phone & online in Spring 2009
- Similar survey conducted a year ago
- Sample selected at random, but all currently buying e-Books
- Librarians held authoritative position in the e-Books acquisition decision-making process
- 11 questions: multiple-choice and open ended
- Included monographs, textbooks and reference works
Sample breakdown

- Based on 2007 Carnegie Classification
- Institutions classified by the CC2000 field
SURVEY RESULTS
Purchasing Preferences

- “Pick & choose” is the preferred model over collections (50% vs. 37%)

- 3 out of 4 respondents focus on developing their front list collection
  - 75% spend at least 70% of their resources on recent books
  - 9% spend more than 50% on back list content

- Librarians currently buy e-Books:
  - By collection (69%)
  - As single titles (49%)
  - By publishers’ platform (44%)
93% do not have a formal migration plan

72% are unlikely to buy the same book in print in 2009
  - Consistent trend across all types of institutions
  - Significant change from last year’s results
Likelihood of buying print and online copies of the same book (%)
## Most popular subject clusters for e-Books purchases

<table>
<thead>
<tr>
<th>Subject</th>
<th>2009 (N=230)</th>
<th>2008 (N=100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference works</td>
<td>59</td>
<td>33</td>
</tr>
<tr>
<td>Science</td>
<td>54</td>
<td>23</td>
</tr>
<tr>
<td>Health/Nursing</td>
<td>54</td>
<td>14</td>
</tr>
<tr>
<td>Business</td>
<td>39</td>
<td>14</td>
</tr>
<tr>
<td>Technology</td>
<td>33</td>
<td>15</td>
</tr>
<tr>
<td>Computer science</td>
<td>29</td>
<td>18</td>
</tr>
<tr>
<td>Social sciences</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Education</td>
<td>13</td>
<td>4</td>
</tr>
<tr>
<td>Religion</td>
<td>13</td>
<td>-</td>
</tr>
<tr>
<td>Psychology</td>
<td>12</td>
<td>3</td>
</tr>
<tr>
<td>History</td>
<td>10</td>
<td>2</td>
</tr>
</tbody>
</table>
End-users’ experience - Positive

- Generally well-received (especially with younger users)
- Increased convenience with 24/7 and remote access
- Searchability to get access to quick facts
- Breadth of collections
- Yet...
How would you rate the ease of use of e-books services for your patrons? (N=230)
End-users’ experience – Less Positive

- Lack of consistency across platforms
- Logistics of reading a whole book online
  - Software requirements
  - Firewall issues
  - Comfort
- Printing limits
- Copy and paste functions
- Concurrent use limitations
- Finding e-Book in library catalog
Libraries’ internal challenges

- 21% reported having no new challenges

Others commented on:
- Cataloging & software requirements
- Funds allocation & gaining administration and faculty support
- Generating usage & evaluating stats
- Perpetual access & license agreements
- Pricing models
- Redefining workflows and roles
- Yet...
How much has your book selection process in the STM changed due to the increased availability of e-books? (N=228)
<table>
<thead>
<tr>
<th>Librarians’ wish list for standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>• License agreements</td>
</tr>
<tr>
<td>• Perpetual access</td>
</tr>
<tr>
<td>• Concurrent use</td>
</tr>
<tr>
<td>• ILL &amp; e-reserve</td>
</tr>
<tr>
<td>• Usage statistics</td>
</tr>
<tr>
<td>• Software</td>
</tr>
<tr>
<td>• Printing &amp; other DRM restrictions</td>
</tr>
<tr>
<td>• Delays in publication</td>
</tr>
<tr>
<td>• Pricing models</td>
</tr>
<tr>
<td>• MARC records</td>
</tr>
<tr>
<td>• Other... Yes?</td>
</tr>
</tbody>
</table>
- Very active market, leading to innovations
- Direct communication between librarians, end-users and publishers is key AND happening!
- Flexibility and standardization required from publishers
- Opportunities to unbundle and consider books at chapter level, or for rent or interactive, or...
Thank you!!!

Questions and comments are most welcome!

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