

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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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

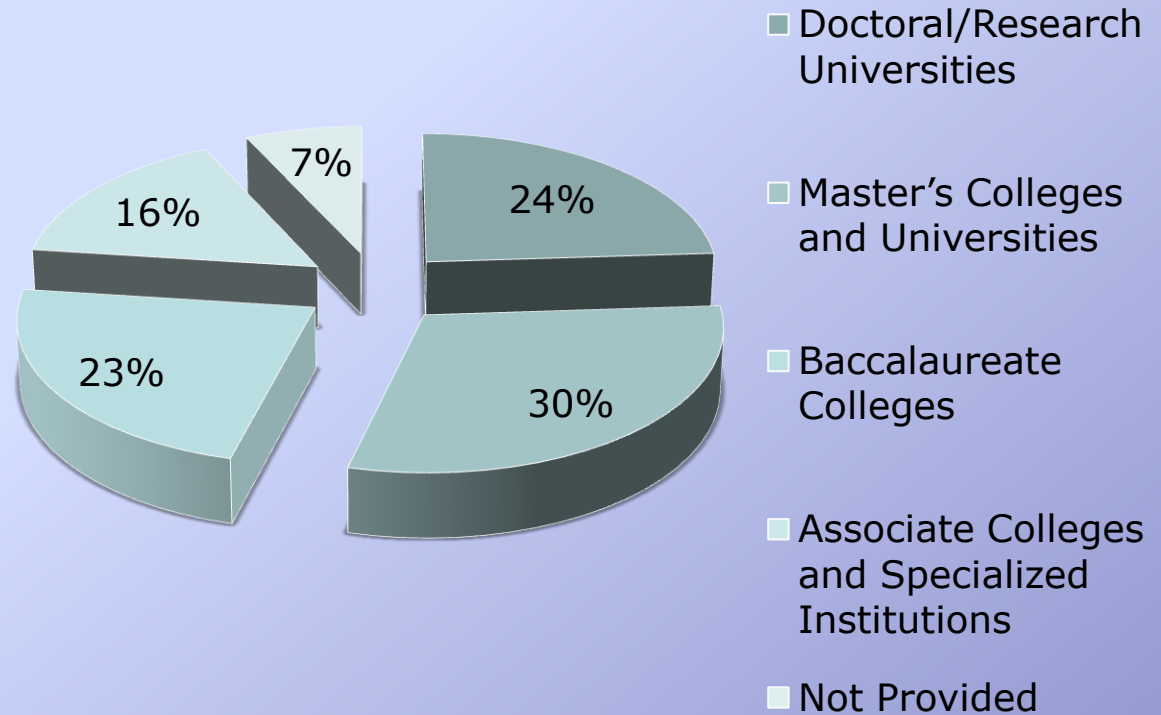
Survey Methodology & Scope

- 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

Type of Institutions





SURVEY RESULTS

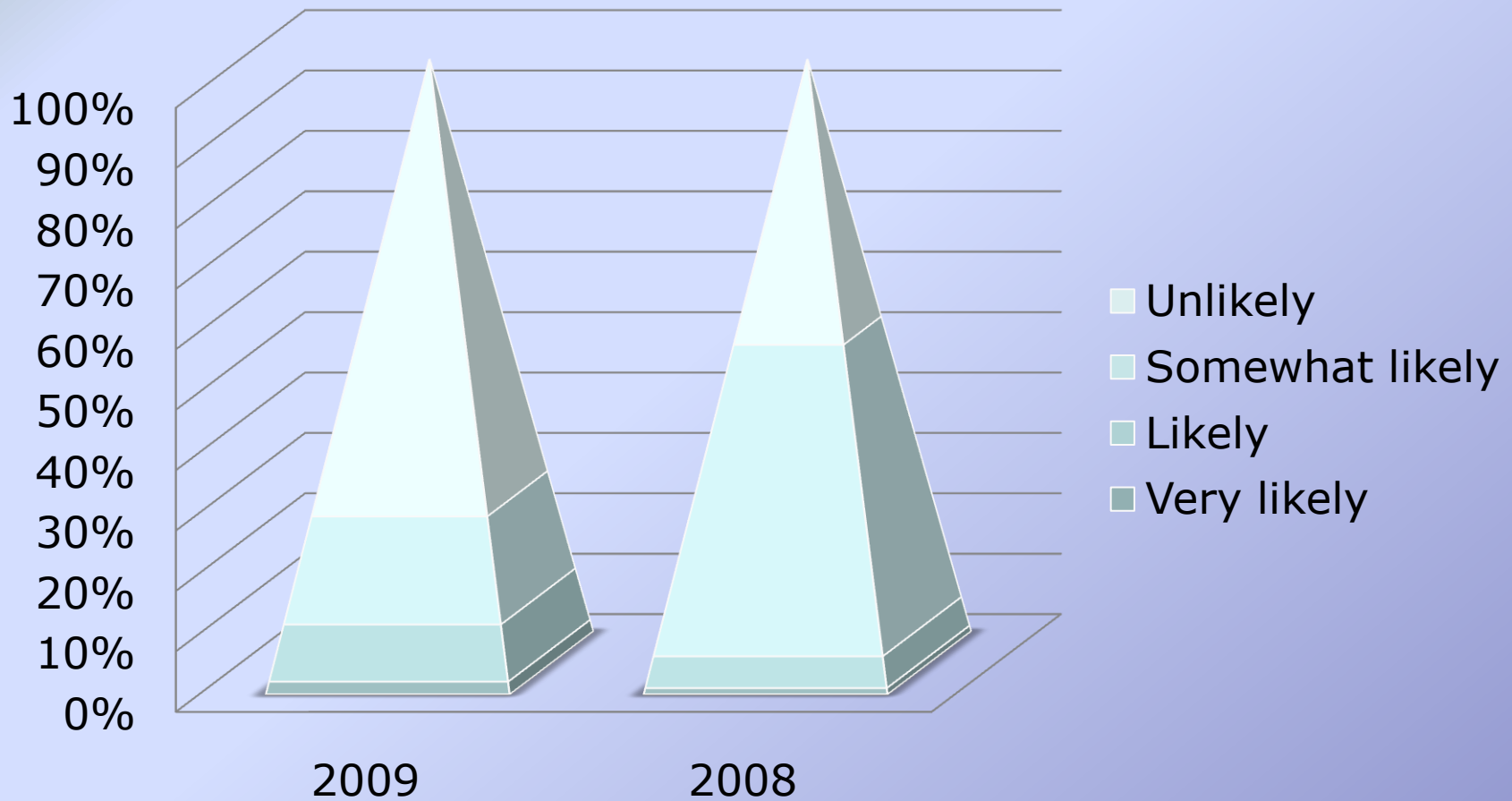
Purchasing Preferences

- “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%)

Print vs. Online Policies

- 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 (%)



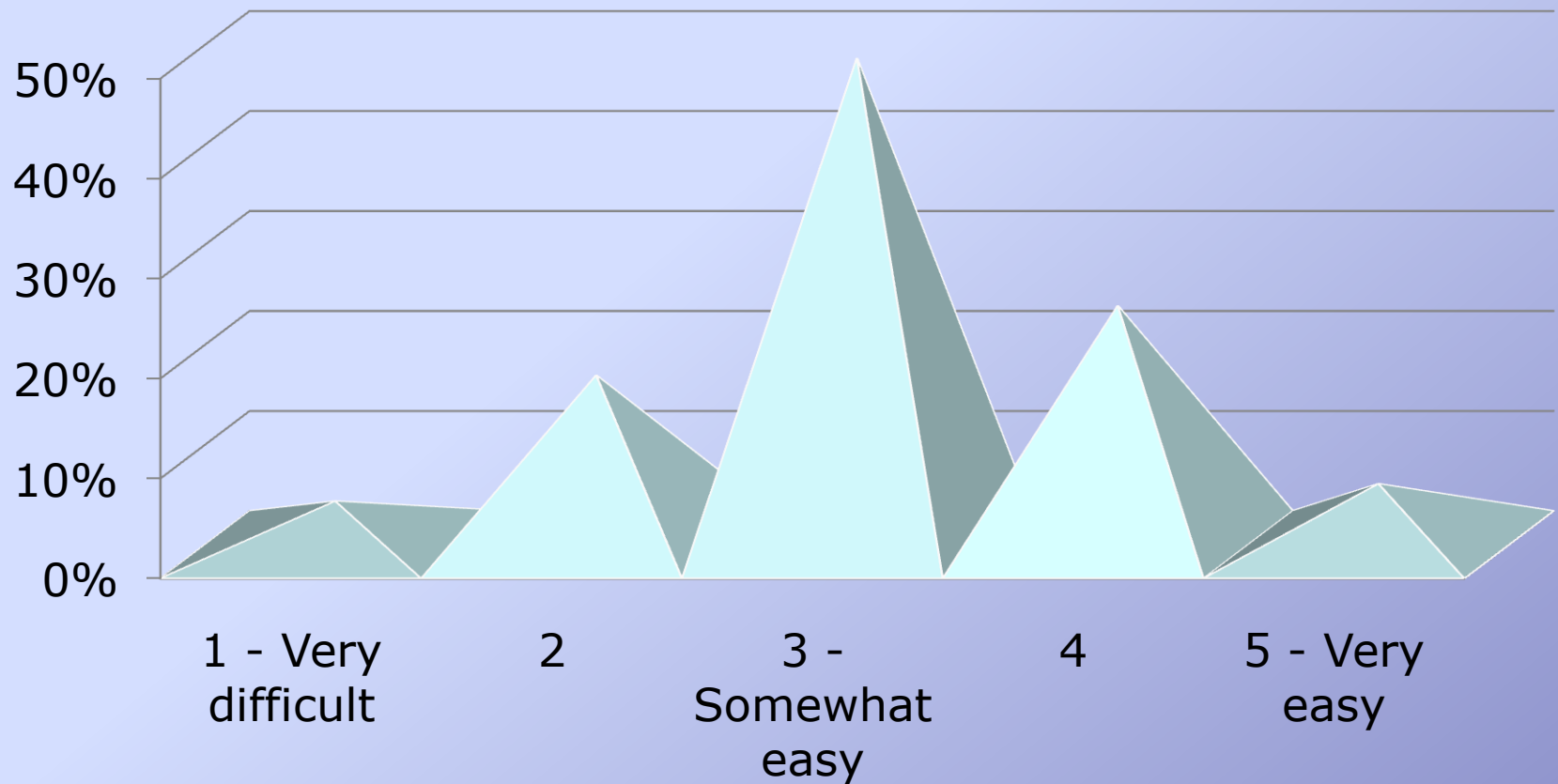
Most popular subject clusters for e-Books purchases

Subject	2009 (N=230)	2008 (N=100)
Reference works	59	33
Science	54	23
Health/Nursing	54	14
Business	39	14
Technology	33	15
Computer science	29	18
Social sciences	15	12
Education	13	4
Religion	13	-
Psychology	12	3
History	10	2

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)



- 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

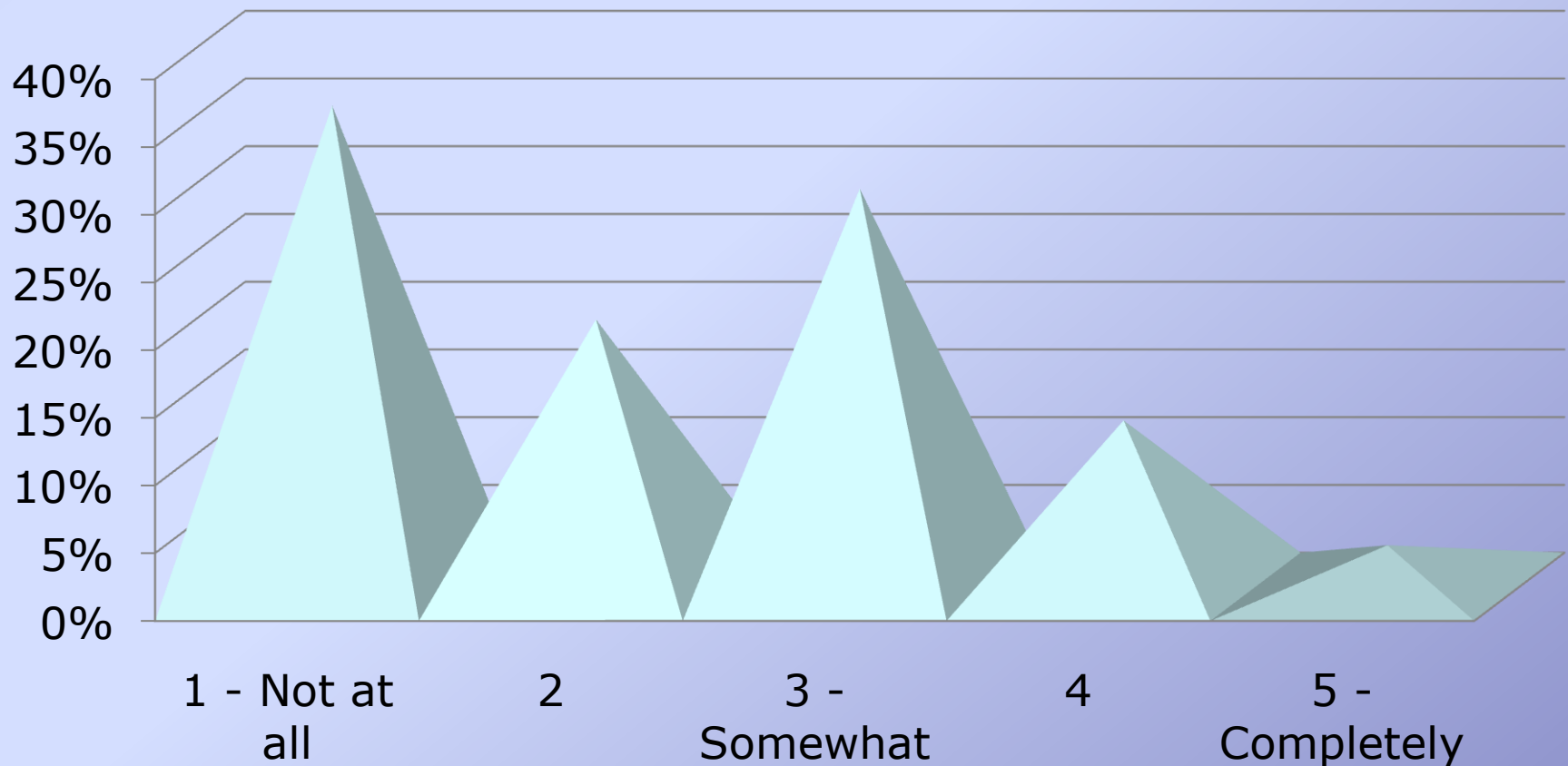
Libraries' internal challenges

- 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)**



Librarians' wish list for standards

- . License agreements
- . Perpetual access
- . Concurrent use
- . ILL & e-reserve
- . Usage statistics
- . Software
- . Printing & other DRM restrictions
- . Delays in publication
- . Pricing models
- . MARC records
- . Other... Yes?

Time to click the page?

- 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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