



E-books in 2008 Are librarians and publishers on the same page?

Results of a telephone survey completed by Publishers
Communication Group

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Publishers Communication Group recently conducted a telephone survey to gain a better understanding of American librarians' experience with e-books. Publishers have introduced an increasing number of options to purchase monographs, textbooks and reference works in electronic format. There are also a variety of new delivery options for these new electronic products. Given these changes could we assume that the transition from print to online, which has been happening over the last 10 years for serials, is a clear indication that the same shift will occur with books? PCG conducted this study to provide insight into the impact of these new offerings. The results aim to gauge e-books' impact on libraries' budgets, to better understand preferred purchasing models and subject areas of interest, the effect on print collections and librarians' perception of the current e-book options.

METHODOLOGY

In January and February 2008, Publishers Communication Group telephoned 100 academic librarians in the US with experience dealing with e-books. The institutions of the surveyed librarians were randomly selected to ensure representation from the main Carnegie Classifications and all geographic regions. In addition, all the institutions in this sample are currently purchasing e-books.

The sample was selected based on the 2007 Carnegie Classification list and institutions were classified by the CC2000 field (code 15-40 and excluding Specialized Institutions). The breakdown of institutions contacted by classification is as follows:

- 39% Doctoral/Research Universities (Extensive and Intensive)
- 22% Master's Colleges and Universities (I and II)
- 26% Baccalaureate Colleges (Liberal Arts and General)
- 13% Associate Colleges

During the interviews with librarians, e-books were referred to in general terms 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 eight questions including a mix of multiple choice and open-ended probes. The participants held positions within the library such as Collection Development or Electronic Resources librarians. The complete questionnaire is included in Appendix A.

KEY FINDINGS

- 43% of the librarians contacted anticipate an increase of their budget for e-books for 2008 compared to last year; 1% expect this part of their budget to decrease. In most cases, these funds will be allocated from the book budget.
- 85% of the librarians contacted purchase e-books as part of a collection and 45% currently acquire individual titles.
- For 78% of the respondents, the priority is placed on purchasing frontlists before backlists from publishers.

- The subject clusters most attractive for e-books for the librarians interviewed are reference, science or computer science titles.
- 45% of the librarians are unlikely to purchase a book in print format if they are purchasing it electronically. 6% are likely or very likely to duplicate the information. For the remaining of the sample, the decision varies greatly based on the subject area and is made on a case-by-case basis.
- E-books are perceived as a very convenient tool to broaden library patrons' access to quality content but too many technical and practical problems still create barriers.

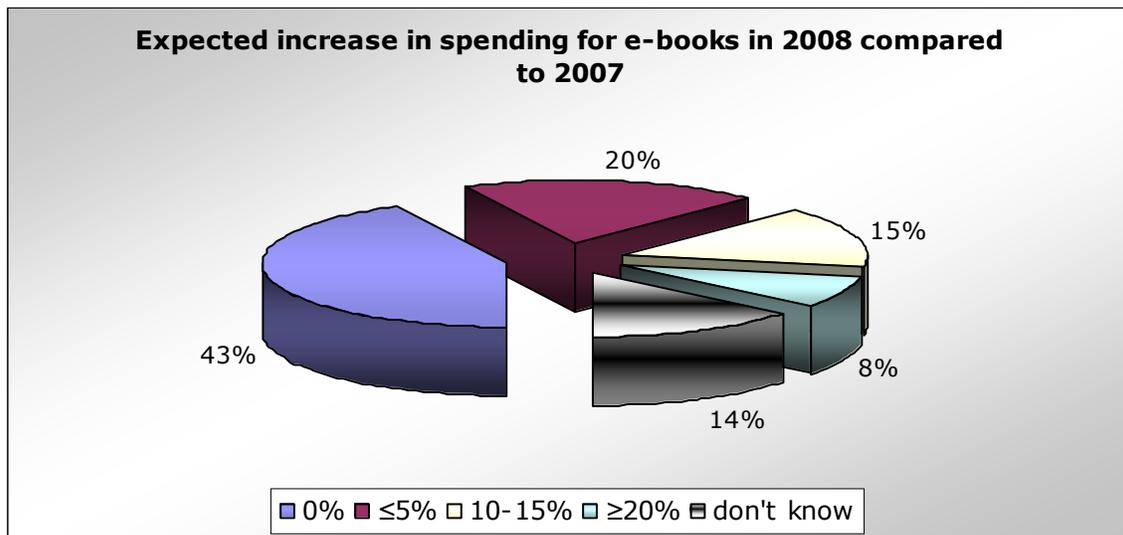
RESULTS

Budget for e-books

43 of the surveyed librarians anticipate an increase of their budget for e-books in 2008 compared to last year while 42 estimated that their level of spending in this area would remain the same. Only 1 librarian said that they planned on spending less on e-books in 2008 than they did in 2007.

When a librarian reported an increase in their spending on e-books, it was on average by 11%. However, 20% of the librarians anticipated a marginal increase of less or equal to 5%. A minority, 8%, anticipates that the increase will be greater than 20%.

It is also interesting to note that most librarians will draw these additional funds from their traditional book budget. In fact, 63% of the librarians reporting an increase for 2008 will assign funds for e-books from the book budget and 19% from the e-resources budget.



Purchasing models

While comments from librarians suggest that they are still experimenting with e-books, they are generally more inclined to purchase collections and bundles of titles over individual e-books at the moment. Among the participants surveyed, 85 were currently collecting e-books collections while buying single titles was a popular practice in 45 libraries. Access to e-books through a third party aggregator was only adopted in 27 libraries.

Concurrently the preferred pricing model for the librarians in this sample is a one-time purchase of the resource (62%). Annual subscriptions were the preferred option for 14% of the participants. While alternative models such as a one-time payment plus an annual maintenance fee is also acknowledged in the academic market, librarians continue to express the same concerns over perpetual access that they had with e-journals.

Consequently, it is also clear one pricing model does not fit all the situations and the decision is often made based on the product, the subject area, the expected usage and the terms of the license agreements. As Chuck Hamaker points out in the attached interview, publishers have not yet experimented enough with pricing options.¹

As is the case with e-journals, librarians have come to rely heavily on their consortia when considering large collections. Therefore it was not surprising to hear many librarians comment on the importance of available group pricing models.

Subject areas

For 78% of the respondents, the priority is placed on purchasing a publisher's frontlists before the backlists. In fact, the great majority of these librarians also explained that they allocate at least 80% of their resources for e-books on frontlists and at most 20% for backlists.

The discipline in question is usually a determining factor in these decisions. When asked which subject clusters were most attractive and/or sensible to purchase e-books, reference, science and computer science titles led the other disciplines. A summary of the subjects cited the most often is included in the table below.

Subject	Number of mentions
Reference	33
Science	23
Computer science	18
Health sciences	14
Business	14
Social sciences	12
Humanities	6
Education	4
Psychology	3
History	2

¹ Publishers Communication Group, *Interview with Chuck Hamaker*, available from <http://www.pcgplus.com/Newsletter.html> ; Internet; accessed May 22, 2008

Print vs. electronic

The last five years have shown the fragile necessity of maintaining a print copy for periodicals. While it is still unclear at this point whether this movement is applicable to the book sector, it is worth noting that 45% of the surveyed librarians are unlikely to purchase a book in print if they already have it electronically. Limited funds make it difficult for them to justify paying for the same content twice. Even though only 6% overall were likely or very likely to duplicate the content in both print and electronic formats, it is important to highlight the reservations expressed in response to this question. As was mentioned earlier, concerns over perpetual access are still very prominent for librarians across North America but e-books also bring forth a new set of issues.

For example, the current offerings can lack technical flexibility, homogeneity across the different readers, and present implementation challenges for libraries. Moreover, while an increasing number of patrons are accustomed to reading content online, reading an entire book on the computer screen requires a change in reading culture and increased availability of portable book readers. Issues with printing and copyright are also even bigger barriers than they were with journals.

For nearly half of the participants, buying a book in both print and electronic form is somewhat likely at their institution since they often decide on a case-by-case basis. Factors taken into consideration include the terms of the license agreements, the electronic version's ease of use, the faculty's preference, the expected usage but also the subject area or accreditation requirements. As shown in the table below, the answer varied greatly depending on the institution's classification.

<i>If you buy a book in electronic form, how likely are you to also buy it in print? (n=100)</i>	Overall	Doctoral / Research Universities	Master's Colleges and Universities	Baccalaureate Colleges	Associate Colleges
Very Likely	1%	-	-	4%	-
Likely	5%	5%	5%	8%	-
Somewhat likely	49%	54%	32%	58%	46%
Unlikely	45%	41%	64%	31%	54%

Advantages and disadvantages

At the end of the survey, librarians were invited to comment on the advantages and disadvantages they saw in the current e-books offerings. Participants particularly appreciated the convenience offered to their patrons. Being able to provide concurrent access to their students and faculty on and off campus 24 / 7 has a great appeal. In addition to this, the younger students are now fully accustomed to finding everything on their computer and are more likely to look for information online than in the physical library. This factor combined with the ease of searching across several books at once will likely lead to increased usage.

For the libraries' processes, e-books simplify or eliminate certain workflows such as binding, shelving, repairing or replacing damaged or stolen books and cataloging. Moreover, as products continue to improve, librarians gain access to a broader range of titles they couldn't otherwise afford to prioritize, while saving space in their building.

Nevertheless, librarians also expressed some concerns in regards to their patrons' level of comfort and familiarity with e-books. Students and faculty still do not prefer to read material online for an extended period of time and favor the print edition. E-books end up not being read cover-to-cover and still require a cultural shift along with more adequate portable device. The e-book format is perceived as being more practical for reference work titles but seem less practical for some resources. Students can also be confused about whether they can print, download or email some of the content they find in e-books.

The impact on libraries' workflows is significant as well because offers and platforms lack consistency. Each offer and license agreement still needs to be examined carefully since copyright, printing or concurrent usage rules vary greatly between platforms. In addition to the time-consuming set up process, librarians are concerned about the imperfect technology currently available. For instance, some platforms can be difficult to browse, search, install or catalog, particularly if they require proprietary software. As a result, librarians find it challenging to train patrons on how to use them, which in turn negatively impacts usage.

As many e-book products are still in the development stage, librarians find their cost to often be prohibitive. They also prefer to have the ability to select titles instead being forced to purchase preselected bundles in order to limit their collection to resources they really need. Finally, they are concerned about the current lack of insurance for perpetual access and wish more consistent guarantees existed.

CONCLUSION

This overview of e-books in the American academic market presents a mixed picture. While demand and budget to meet it do exist, particularly in reference, science, technology and medicine, so does a clear need for more standardization in delivery and pricing 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 and the library and users learning curve.

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 new offering would be enhanced by promoting more dialogue between the different parties to address users' needs as well as the libraries' challenges. Given that libraries are the prime market for e-book publishers, it is imperative that the suppliers work to support their goals. To do this, we need to use these findings to find solutions and refine offerings to satisfy both the suppliers and buyers.

APPENDIX A
PCG E-Book Survey Script

Hello, my name is... and I am calling with Publishers Communication Group. We are conducting a survey among professional librarians in the United States regarding E-Books and your purchasing preferences for this fairly new offering. We hope to gain a better understanding of what librarians prefer in terms of electronic books.

If you are able to help us, we will provide back to you a free copy of an analysis of our findings. The identity of your library will be kept confidential and the results will only be used as aggregate numbers.

Q1) Are you currently purchasing any e-books?

- (If yes, Singly? Collections? By platform? By aggregators?)
- (If no, why not?)

Q2) By what percentage do you anticipate your budget for e-books for 2008 to change compared to 2007?

Q3) Which part of the budget will these funds come from (book, journals, e-resources, separate line item, other)?

Q4) Which purchasing models do you like the best? (one-time purchase, subscription, timed access, etc.)

Q5) If you buy a book in electronic form (either singly or from an aggregator), how likely are you to also buy it in print?

Q6) Which subject clusters do you find to be an attractive and/or sensible purchase option for your library?

Q7) What proportion of e-book spending is going towards frontlist vs. backlist?

Q8) What do you see as advantages and disadvantages of using and purchasing electronic book?

Thank you very much for your time.

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 both North American and Europe.

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

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