HighWire Press

2009 Librarian eBook Survey

Survey Results Analysis by
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Foreword

With the recent explosion in the ebooks arena—diversity of products and business models, increase in market demand, and the emerging technological options—HighWire Press has found itself in the position of both looking forward and looking back. Like others in the industry, we are gazing into the future trying to understand and navigate this quickly evolving landscape nimbly and responsibly on behalf of our publisher customers and their own constituents: readers, researchers, and librarians. There is much to learn about how best to proceed in disseminating academic and scholarly ebooks. But, having spent 15 years working on online journals (and occasionally reference books, databases, and proceedings as well), we find that there is also much that feels familiar about this current stage in ebook evolution. Experience tells us, for instance, that fine-tuning discoverability will be important, that collecting and offering usage data in a meaningful way will be critical, that finding ways to responsibly integrate scholarly content in a way that fits with the reader's workflow will be key. It also tells us though that it is important to test any assumptions about what librarians and users will want and need from ebooks, especially when the technology and market are changing so rapidly that they may not sometimes know themselves.

HighWire has always embraced the concept of "evidence-based" publishing. We seek to validate our assumptions and develop our core offerings by collecting information about users and their usage. We share that information with our community of publishers and in turn learn from the information that they have gathered. In September-October 2009, we conducted a survey of librarians in order to learn more about how they find and purchase ebooks. We are extremely fortunate to have access to a large and knowledgeable group of librarians in primarily academic and research institutions. We are also extremely fortunate, through our affiliation with Stanford University Libraries, to be able to be able to enlist the services of Michael Newman, Head Librarian and Bibliographer at the Falconer Biology Library at Stanford, to analyze the data that we collected and lend his librarian's perspective on what his colleagues had to say about ebooks. His findings make up the report that follows.

This survey represents one facet of the research we are conducting into ebooks, which also includes interviews with scholars and publishers. We hope it proves a useful addition to the body of qualitative and quantitative research being published on the ebook market. We look forward to presenting more of such research in the future, and in the meantime welcome your comments and questions.

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February 2010

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Executive summary

In the fall of 2009, HighWire Press invited librarians to participate in a survey on attitudes and practices related to digital books (ebooks). One hundred thirty-eight librarians from 13 countries responded to the survey conducted via surveymonkey.com. Sixty-two percent of participants work in graduate/professional or undergraduate academic institutions, and participants represent a variety of roles in libraries, including reference, instruction, technical services, acquisitions, serials, digital resource management, and administration.

Participants predict significant growth in library ebook budgets in the next five years. Most participants work in libraries that have large budgets for digital resources, with 79 (59%) reporting that their budgets are greater than $250,000. However, in most cases a small percentage of this is currently spent on ebooks, with 60 participants (44%) indicating that their library owns or subscribes to 10,000 or fewer ebooks.

Most of the results were consistent with other market research and analysis done on ebooks in recent years, reflecting the now familiar themes:

- Simplicity and ease of use are ebook features that are valued by librarians, over and above more sophisticated end-user features.
- Traditional sources of book discovery continue to be important for ebooks as well. Librarians find and learn about ebooks from book vendors and by inclusion in content bundles. They believe that users discover ebooks through the library catalog and through Internet search engines.
- Participants indicated that users prefer ebooks in PDF format, but as one participant stated, format preference will change as technology changes.
- Digital rights management is the single most important factor that hinders ebook use for library patrons.
- Purchase with perpetual access is the most acceptable business model for ebooks, with 83% of participants indicating that this model is very acceptable. However, significant numbers of participants indicated that other very different models are also acceptable.

Part A: Survey results

1. What is the [name and] location of your library?

Country:

Australia	2	New Zealand	1
Canada	6	South Africa	3
China	1	Sweden	1
France	3	Taiwan	1
Ireland	1	United Kingdom	4
Italy	3	United States	94
Netherlands	2	Unspecified	16

2. Which of the following best describes your library or branch?

Corporate/Industry	2
Government/National	4
Graduate/Professional Academic: Humanities	6
Graduate/Professional Academic: Science, Medicine, Technology	48
Graduate/Professional Academic: Social Science, Law	1
K-12 School	1
Public	1
Undergraduate Academic	37
Other	38
Total responses	138

Other (please specify)

- Academic Science, Medicine, Technology, Humanities, Social Sciences
- Graduate/professional Humanities, Science, Medicine, Technology, Social Science, Law (7)
- Branch library for mathematics
- Carnegie classification Master's/L: Master's Colleges and Universities (larger programs)
- Community college
- Community College with some undergraduate degree programs
- Comprehensive Academic library (2)
- Doctorate-granting institution with career focus
- Graduate
- Graduate/Professional Academic
- Graduate/Professional Academic: Education, Psychology, Business
- Graduate/professional general
- Hospital medical library (3)
- Library system serving undergraduates, graduates, professional, and medicine
- Philosophy, history, religion, and museum
- Museum
- Nonprofit research institute
- Ph.D. level academic, all disciplines

- Private library but open to public for research
- Private non-profit biomedical research institute
- Public nonprofit research institute
- Research Institute
- Special library
- Undergraduate/Graduate Academic: Liberal Arts

- University Library (2)
- Undergraduate/graduate library in humanities, sciences and social sciences
- University undergraduate and postgraduate - Business, Law, Social Sciences, Art, Architecture
- Very large Carnegie, Research Intensive

3. What is your role in the library? Please select the role that best describes your job.

Administration/Management	27
Collection Development/Acquisitions Librarian	49
Reference Librarian	21
Technical Services Librarian	11
Instruction/Training Librarian	2
Other	28
Total responses	138

Other (please specify):

- Administration/management, collection development/acquisitions librarian, and technical services librarian
- Administration/management, collection development/acquisitions librarian, technical services, and instruction/training librarian (2)
- Archives and web librarian
- Branch librarian and subject liaison
- Cataloging and reference librarian
- Chief librarian
- Clinical medical librarian
- Collection development, acquisitions, serials, and technical services librarian
- Collection development, acquisitions, technical services librarian

- Coordinator of electronic resources and serials
- Digital information resources manager
- eBook technical services specialist
- Electronic Resources Librarian (4)
- Head librarian and bibliographer
- Head of information services
- Hospital librarian
- Library policies librarian
- Professor
- Reference assistant
- Science librarian
- Solo librarian
- Special collections librarian
- Subject librarian
- Teacher library leader

4. What is your library's annual budget for electronic resources, including journal article index databases, digital journals, digital books, and factual databases that are leased or purchased and maintained locally or remotely?

$0-$5,000	5
$5,001-$10,000	2
$10,001-$25,000	4
$25,001-$50,000	1
$50,001-$100,000	10
$100,001-$250,000	14
>$250,000	79
Don't know/decline to answer	19
Total responses	134

5. How many ebooks does your library subscribe to or own?

0-250	31
251-1,000	11
1,001-5,000	18
5,001-10,000	9
10,001-25,000	10
25,001-50,000	15
50,001-100,000	14
100,001-500,000	10
>500,000	6
Don't know/decline to answer	11
Total responses	135

6. What percentage of your library's acquisitions budget do ebooks currently represent?

0%	14
1%-10%	77
11%-25%	12
26%-50%	6
51%-75%	0
>75%	1
Don't know/decline to answer	26
Total responses	136

7. What percentage of your library's acquisition budget do you think ebooks will represent in 5 years?

0%	3
1%-10%	20
11%-25%	55
26%-50%	20
51%-75%	6
>75%	5
Don't know/decline to answer	27
Total responses	136

8. How do you find and learn about ebooks? Please rate how significant the following methods are to your discovery of ebooks.

Response	Not significant	Somewhat significant	Significant	Very significant	No opinion / Don't know	Total responses
Request from individual (patron, faculty, student)	38	23	19	35	6	121
Colleagues	21	35	40	17	4	117
Reference in the research literature	24	33	38	18	7	120
Book review (e.g., CHOICE review)	25	39	26	17	8	115
Blog or other social media	48	37	14	6	11	116
Website recommendation feature (e.g., "others who bought this also bought…")	62	26	12	4	10	114
News item	23	55	17	14	8	117
Inclusion in content package/bundle	15	24	31	43	5	118
Book vendor	10	27	34	44	6	121
Publisher marketing material (press release, ad, etc.)	11	29	38	30	8	116

Other (please specify):

- Acquisitions list of same subject area collection libraries
- Consortial purchase (8)
- Direct work with publishers
- Ebooks have not yet caught on in the medical world, even among medical students
- Free websites such as PubMed Bookshelf, FreeBooks4Doctors
- Google Books
- Patrons are not yet requesting ebooks
- Proactive searching (2)
- Professional associations, meetings, and exhibits at conferences (3)
- Vendor newsletter

Question 8

- Request from individual (patron, faculty, student)
- Colleagues
- Reference in the research literature
- Book review (e.g., CHOICE review)
- Blog or other social media
- Website recommendation feature (e.g., "others who bought this also bought…")
- News item
- Inclusion in content package/bundle
- Book vendor
- Publisher marketing material (press release, ad, etc.)
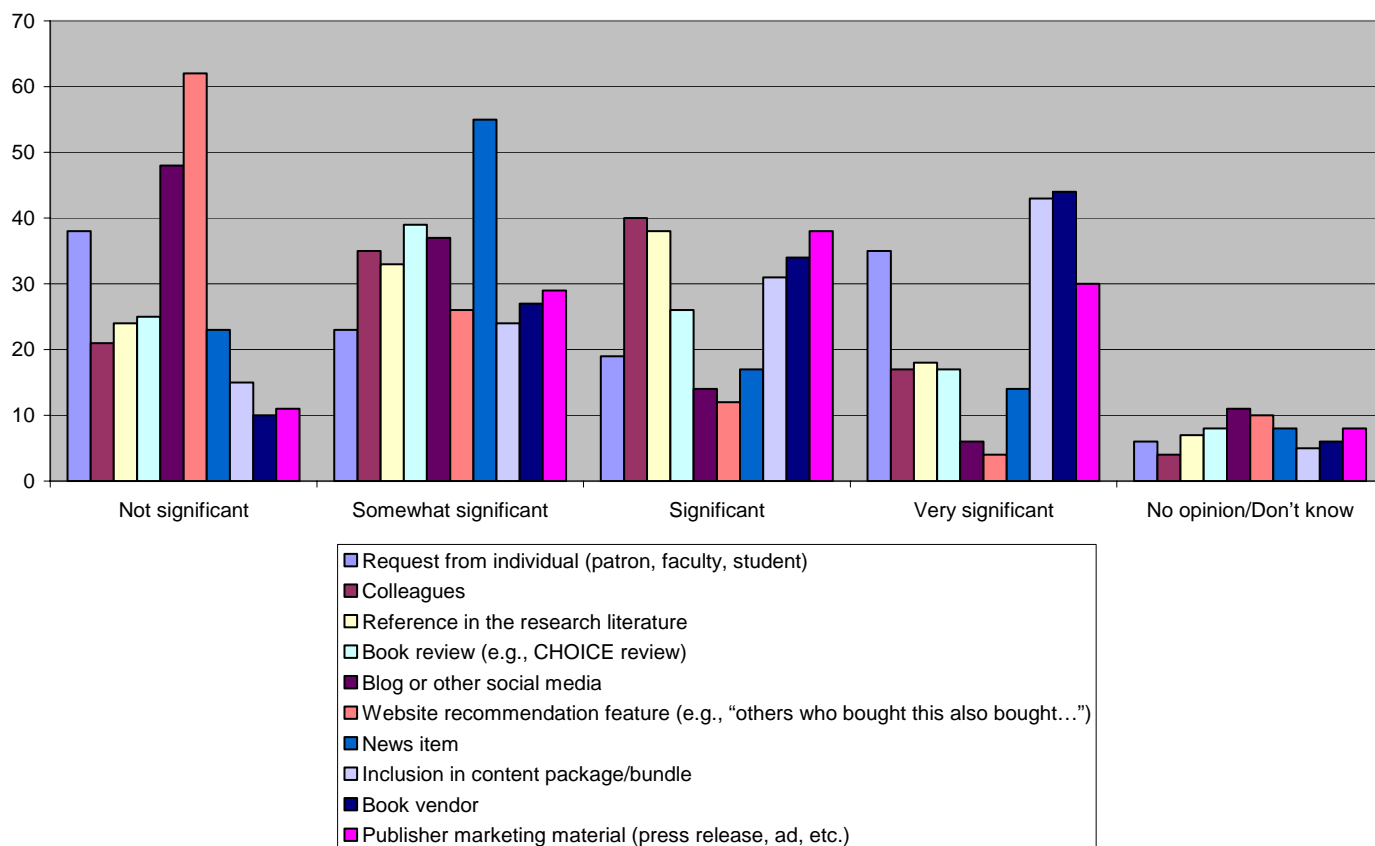
9. In which format do users generally prefer ebooks? Please select one.

PDF	53
Full-text HTML	16
Optimized for dedicated ebook device (e.g., Kindle, Sony Reader)	4
Optimized for other mobile device (e.g., iPhone)	0
Don't know	37
Other	18
Total responses	128

Other (please specify):

- Library preference is for format that allows downloads to users' various mobile devices
- Multiple formats are needed: PDF, HTML, optimized for ebook device, and optimized for other mobile device (2)
- Our users like the following - but they rank equally -- HTML for online reading -- PDF for offline printing & reading -- Optimized for mobile device
- PDF and HTML both popular (3)
- Preference varies as new devices appear. The current preference is use of PDF or HTML on a laptop
- So far there has not been much interest for sustained reading (as opposed to spot-checking) because titles aren't available or screen fatigue sets in.
- There is not a clear preference up to now
- Users have a strong preference for the JSTOR format. This is a great model to emulate for monographs.
- We have assumed PDF is preferred but mobile device access may soon be preferred by most users
- XML

10. In your opinion, what are the most common methods your users use to discover ebook content? Please rate the significance of each of these methods.

Response	Not significant	Somewhat significant	Significant	Very significant	No opinion / Don't know	Total responses
Internet search engine (e.g., Google)	12	28	30	41	11	122
Online bookstore (e.g., Amazon)	22	28	24	25	21	120
Other online aggregator/distributor	22	31	27	17	21	118
Library catalog (OPAC)	1	23	43	49	7	123
Library website	7	26	43	39	5	120
Publisher website/platform	20	34	35	15	19	123

Other website (e.g., blog)	30	37	10	5	35	117
Class/course syllabus	15	15	40	34	15	119
Reference in the research literature	21	37	32	10	22	122
Recommendation by colleague/friend/librarian	8	27	48	26	11	120

Other (please specify):
- Course syllabus will become very significant very soon
- Courseware course resource pages (e.g. BlackBoard) is the most important access point for users.
- Federated search engine (2)
- Google Books
- OpenUrl and DOI play a role here, and can play a more significant one in the future
- Professional association
- Social media
- Vendor trial access
- WorldCat

Question 10

Legend:
- Internet search engine (e.g., Google)
- Online bookstore (e.g., Amazon)
- Other online aggregator/distributor
- Library catalog (OPAC)
- Library website
- Publisher website/platform
- Other website (e.g., blog)
- Class/course syllabus
- Reference in the research literature
- Recommendation by colleague/friend/librarian
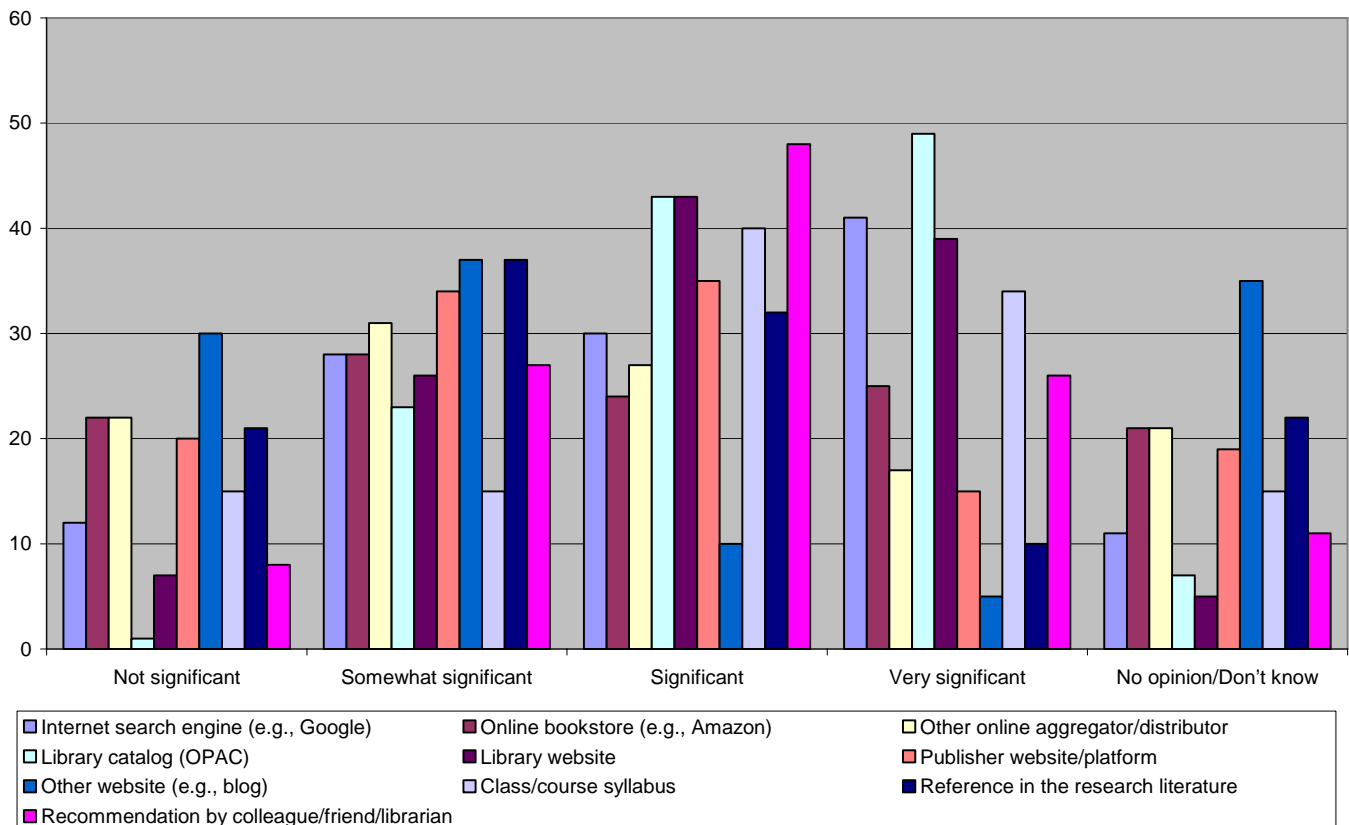
11. What hinders your patrons the most in their use of ebook content? Please rate the significance of each of the factors below.

Response	Not significant	Somewhat significant	Significant	Very significant	No opinion / Don't know	Total responses
Difficult to find /discover	10	36	33	32	12	123
Difficult to read onscreen /online	12	30	37	32	12	123
Difficult to annotate	21	27	35	20	20	123
Digital rights management (e.g., limited printing)	9	14	30	55	15	123
Not available for preferred devices	21	30	29	9	29	118
Prefer print	8	34	40	28	12	122
Lack of content	28	28	22	25	19	122
Lack of training	30	33	25	16	18	122

Other (please specify):
- Concurrent seat access model does not allow for exam times or other brief periods of heavy use (2)
- Cost and pricing: the difficulty of purchasing content in multiple formats; cost of site licenses for heavily used books (2)
- Digital rights management: downloading of entire book is not possible; textbooks are not licensed to institutions; offline viewing is prevented; printing is limited or prohibited (4)
- Interface usability: slow to move from page to page; limited view options; no linking from table of contents or index; print book can be easier to use when quick answers are needed (3)

- It is not possible to search across "silos" of content created by publishers
- Lack of availability via interlibrary loan
- Lack of Internet connectivity for poorer students, students living in rural areas lack high speed access
- No color on Kindles
- No demand for ebooks from users yet
- Poor support for visually impaired readers on some platforms.
- Refer to the JISC eBooks National Observatory Project Report-
- Timing and production issues: in some cases, ebook lags print (2)

Question 11
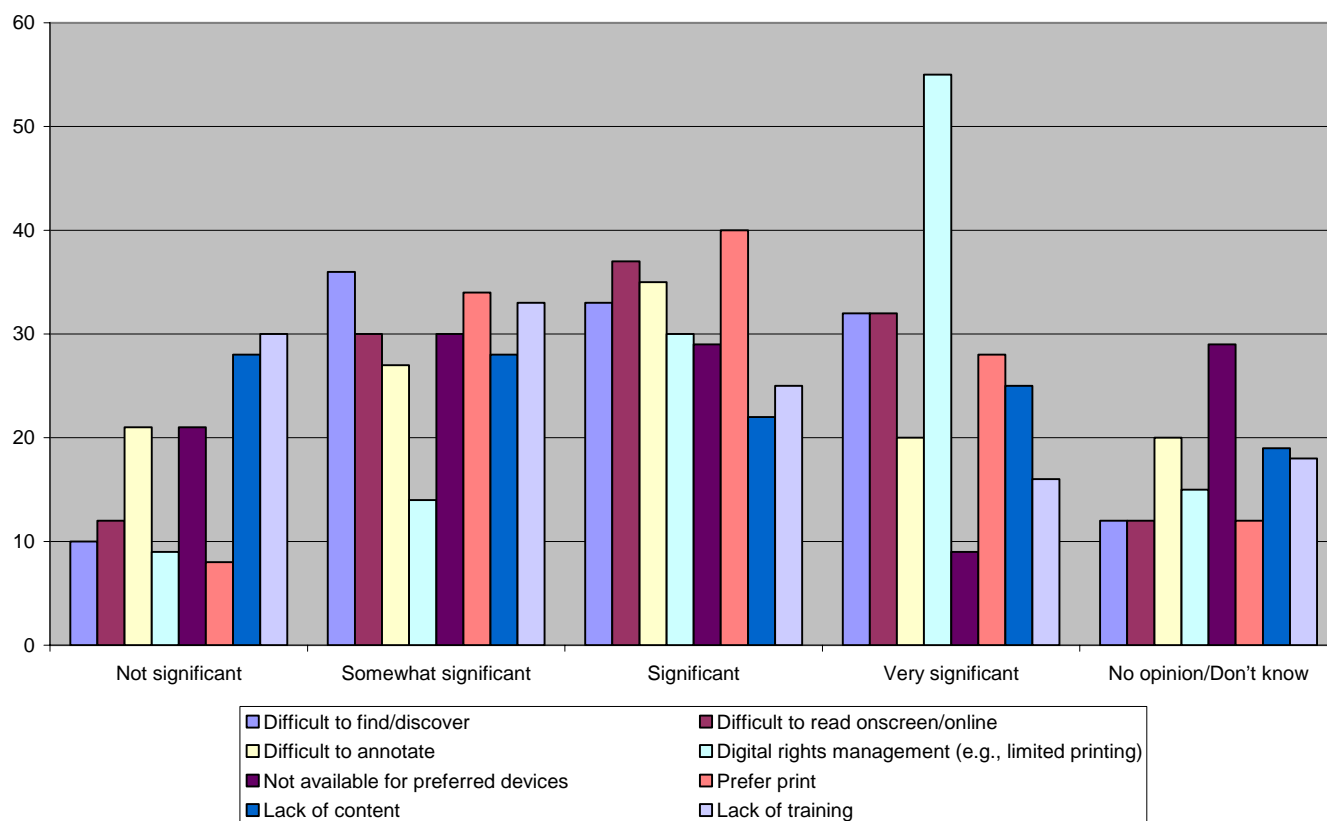
12. How acceptable is each of the following business models for acquiring ebooks? Please rate each model.

Response	Unacceptable	Somewhat acceptable	Acceptable	Very acceptable	No opinion / Don't know	Total responses
Purchase with perpetual access	2	2	13	96	2	115
Purchase with perpetual access through self-hosting	22	38	23	19	10	112
Subscription	16	48	38	9	1	112
Pay-per-use	43	40	14	8	9	114
Lease to own	27	44	17	5	19	112
Concurrent seat access	13	32	30	21	18	114
Bundled with other content	16	45	33	10	9	113
Patron-driven acquisition	19	22	32	24	16	113

Upfront purchase + maintenance fee	20	34	42	9	9	114
Upfront purchase + update fee	8	43	43	9	11	114

Other (please specify):
- Consortial purchase with perpetual access thru self-hosting
- Even large libraries may need to change their ownership models of the past as ebooks change the publishing world.
- I want to purchase all books on a title by title basis without bundling.
- Mixed palette of concurrent options
- Open Access/Free
- Pricing needs to be competitive with paper bound price, not the cloth. Flat maintenance fee or low threshold fee like ebrary.
- Single user for life of edition, with multiple users allowed during exam periods

13. What are the most important drivers for your library's ebook purchasing decisions? Rank the following five drivers in the order in which they factor into those decisions.

Driver	1—Least significant	2	3	4	5—Most significant	Total responses
Inclusion in bundles/packages	34	23	14	13	12	96
Patron request/recommendation	13	12	21	24	19	89
Book reviews	41	36	14	8	2	101
Selection by subject expert	5	16	33	29	22	105
High usage statistics	2	11	21	28	49	111

Other (please specify):
- Availability as a single title purchase, not part of a bundle and not on an aggregator's website
- Bundles have worked well for us in that we find those to be very similar to journal models and to date the best bundles have been provided by the big journal publishers
- Consortial decision for purchase and contribution to that purchase (2)
- Distance education needs
- General interest, widely used textbooks
- Limited space to shelve new print materials
- platform features and restrictions on use
- Reading List resources
- Required use in curriculum
- The strongest driver for purchasing ebooks is the 24-hour availability
- We do not subscribe to ebooks
- We don't buy an e-book if the model is not workable for us. If the title doesn't behave like an e-journal and carry the same type of usage rights we are very likely to buy it no matter who requests it.

14. How influential is each of the following ebook platform features on your ebook purchasing decisions? Please rate the significance of each feature.

Response	Not significant	Somewhat significant	Significant	Very significant	No opinion /Don't know	Total responses
Simplicity/ease of use	1	4	26	83	0	114
User personalization services (e.g., saved preferences)	14	33	43	19	4	113
Notetaking/annotations capability	11	34	39	20	7	111
Metadata/MARC record availability	6	22	28	54	2	112
Integration with OPAC	3	17	20	71	2	113
Print on demand capability	13	29	34	32	4	112
Restrict user searches only to subscribed content	14	25	32	26	13	110
Compatibility with e-readers/devices	22	30	32	16	11	111
Integration with other content, such as journals	18	34	35	17	8	112
User sharing (e.g., social bookmarks, comments, voting)	26	47	20	7	12	112

Other (please specify):

- Ability to download/print an entire chapter rather than only one page at a time is very important (2)
- Ability to load into consortial ebook platform and share with consortial partners (2)
- Interface usability: searchability; ease of use and connection; speed and recognized normal behavior; 24-hour access; all the functionality of ejournals (3)
- Interlibrary loan rights (2)
- K.I.S.S. is the most important feature.
- No proprietary reader should be required

Question 14

Simplicity/ease of use	User personalization services (e.g., saved preferences)
Notetaking/annotations capability	Metadata/MARC record availability
Integration with OPAC	Print on demand capability
Restrict user searches only to subscribed content	Compatibility with e-readers/devices
Integration with other content, such as journals	User sharing (e.g., social bookmarks, comments, voting)
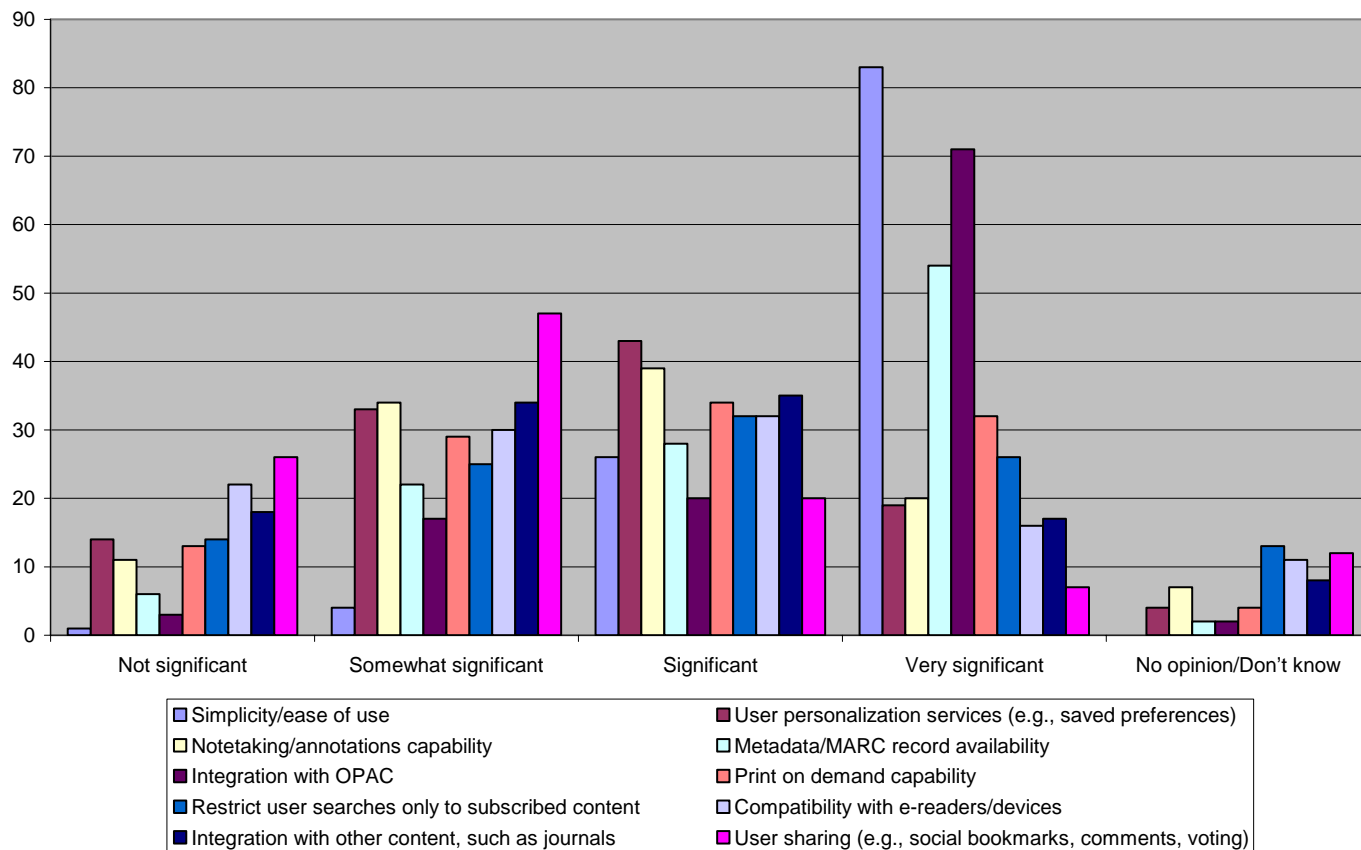
15. How acceptable is the use of certain forms of digital rights management (DRM) on ebooks? Please rate the acceptability of each of the following forms of DRM.

Response	Unacceptable	Somewhat acceptable	Acceptable	Very acceptable	No opinion / Don't know	Total responses
Limited downloading	39	46	19	3	6	113
Limited printing	50	45	8	4	6	113
Limited saving	42	47	15	1	8	113
Limited cut/paste	54	41	10	2	6	113
Limited length of access	68	18	14	4	6	110
No inter-library loan	61	22	16	4	8	111

Legend: Limited downloading | Limited printing | Limited saving | Limited cut/paste | Limited length of access | No inter-library loan
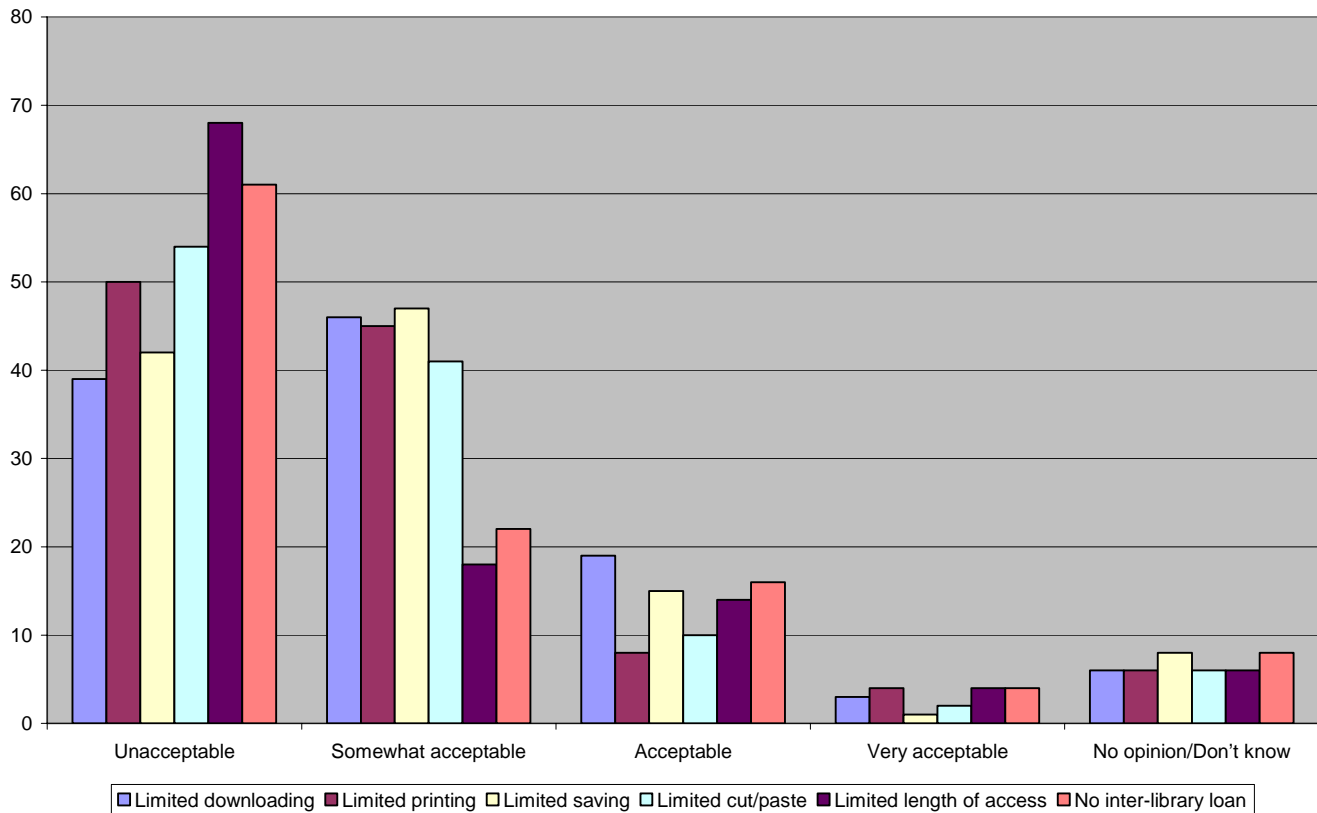
16. From which vendors do you currently purchase/subscribe to ebooks? Please check all that apply.

Vendor	Count
NetLibrary	60
Ebrary	44
Safari	38
OverDrive	2
MyiLibrary	22
EBL	11
Cengage/Gale	45
CredoReference	18
Book vendor or subscription agent	44
Directly from publisher	73
None	7
Other	34

17. From which vendors do you *prefer* to purchase ebooks? Please check all that apply.

NetLibrary	18
Ebrary	32
Safari	12
OverDrive	3
MyiLibrary	17
EBL	4
Cengage/Gale	17
CredoReference	7
Book vendor or subscription agent	46
Directly from publisher	53
None	13
Other	21

18. For the vendors that you selected in the previous question, please indicate any qualities—positive or negative—that influenced your preferences.

Summary of Comments:

- Ability to find digital version if the print version is known
- Ability to search individual titles or all titles within a platform
- Acquisitions process that mimics the procedure for printed books and integration with book vendors (3)
- Aggregators are preferred because titles from different publishers can be selected
- Automatic updates to content
- Availability of consortium contracts
- Availability of individual (unbundled) titles (3)
- Availability of relevant titles (9)
- Availability of user support
- Book publishers and vendors are preferred to aggregators because aggregators place too many restrictions on use (3)
- Digital rights management that allows printing or downloading of chapters, not single pages or a few pages (5)
- Discoverability
- Ease of access and use (8)
- Ease of purchase and integrated purchasing with print book purchasing (5)
- Ebook is available when print version is published without delay
- Ebooks must be kept current with new editions published during the life of the ebook subscription
- Excellent customer service and usage data (2)
- Exclusive publishing with one vendor is not recommended
- High quality content (4)
- In the future, use on ebook readers will be more important
- Indication of purchased content in search results
- Integration of content with other resources

- It is easier to add titles to existing agreements
- LOCKSS participation
- MARC record availability (4)
- Multiple simultaneous users (4)
- New content is integrated into existing platform
- No minimum package required to purchase
- Open URL (SFX) linking
- Patron-driven acquisition (3)
- PDF is the preferred format. No proprietary reader (3)
- Perpetual access (3)
- Pricing is reasonable in comparison with print and in comparison with other ebooks (6)

- Purchase is better than subscription (2)
- Recurring maintenance fees are undesirable, and often these are avoided by purchasing directly from publishers.
- Reliability of access and quick response time
- Simplicity of licensing conditions
- Strong relationship between the vendor and the publisher that allows the vendor to advocate for the release of more e-content
- Title list is readily viewable in the platform

19. If an ebook were available from multiple sources, what would lead you to purchase directly from the publisher? Please check all that apply.

Price	101
Business model	65
End-user features	75
Fewer DRM-related limits	66
Bundling with other desirable content	40
Co-hosted with other content I administer	39
Ease of account administration	66
None	3
Other	16

Other (please specify):
- Ability to load data locally or consortially
- Ability to work with the publisher as the copyright holder
- Annual title bundles
- Consortial licensing and access (2)
- Few license problems, perpetual access (2)

- Interface usability: simplicity and ease of use
- Interlibrary loan rights
- Off-campus IP access
- Publication simultaneously with print
- Usage reports:easy to obtain and easy to use (2)

20. Are there any additional important factors not covered above that publishers should consider when publishing ebooks?

Summary of comments:

- A common or dominant user interface for ebooks is needed. This could be an open-source product.
- Allowing modes of participation (subscription, pay-per-use, purchase, etc.) at the same time by the same institution.
- Availability and content of MARC records needs to be improved.
- Both individual titles and subject packages should be offered. (3)
- Bundled content is not preferred when individual ebooks are very limited in scope.
- Consortial licensing and access is important.
- Content should be available for course reserve.
- Content that is sold to individuals only and not to institutions causes great frustration for librarians.
- Ebook are most useful in medicine, computer science, and other areas where frequent updates are important.
- Ebook packages should not contain old titles mixed with new titles.
- Ebooks must be published at the same time as print. (3)
- Ebooks must be published before the print version
- Ebooks should be available via library catalog.
- Ejournals have shown that it is possible for electronic publishing to transform the delivery and use of information, and the same can happen with ebooks.
- Even if an ebook is available directly from the publisher, sales would be increased if it is sold through book vendors.
- If ebooks are to replace print (and they must), they need to be released simultaneously, priced comparably, and platform-agnostic.

- It is important that ebooks include images. These should not be omitted because of copyright issues.
- More student textbooks need to be available as ebooks (at a reasonable price) (2)
- Offline viewing needs to be sorted out in order to accommodate reading and studying in areas without Internet access.
- Preference for IP-based access with no concurrent user limit.
- Promote title-level and page-level linking via social software and course management software.
- Provide both HTML and PDF formats.
- Purchase models are important.
- Quality of digitization is very poor in some cases as ebooks are produced.
- Searching browsing and linking index to actual page numbers are important features.
- Some ebook platforms are limited in that they combine several titles without allowing the user to view individual titles separately.
- Some publishers seem to offer less popular titles in p+e and more popular titles in print only and this model does not serve users well.
- The Springer ebook model is great because of its lack of DRM controls.
- Users use ebooks to answer a particular question, not to find a particular book. Therefore, a critical mass of material within one collection is important.

Part B: Discussion

Overview of Survey Respondents

One hundred thirty-eight librarians submitted responses to the Librarian eBook Survey, though many did not answer all questions. Most work at large academic institutions, but museums, small colleges, public libraries, hospitals, and national libraries are represented among those who completed the survey. The responses represent 13 countries.

Question 2: Academic librarians are well represented.

Over one-third of participants (48) indicated that they work in graduate/professional academic libraries in science, medicine, or technology. Twenty-seven percent (37) work in undergraduate institutions. Another 28% (38) selected "other" from among the choices offered. These participants work in a wide variety of organizations: colleges, museums, non-profit organizations, hospitals, and research institutes. Several who selected "other" indicated that they work in undergraduate or graduate academic institutions whose focus varies to some degree from that of the choices offered. For example, some participants who selected "other" specified that their institution is a graduate institution in all disciplines. All responses entered in "other" are listed above. Some of these were edited to remove information that identifies specific institutions or to cluster very similar responses.

In the analyses below, answers to some questions are correlated with the type of the librarian's institution. Institutions are classified as either graduate/professional academic or undergraduate academic. Other types of institutions are not represented in numbers large enough for useful analyses. Some participants who marked "other" in Question #2 clearly indicated that their institution is either a graduate/professional institution or an undergraduate institution. Others were less clear. Those that were clear were categorized appropriately for the analyses below. This gave a total of 65 responses from participants at graduate/professional institutions and 39 from participants at undergraduate institutions. All others were categorized as "other" and not used in these more narrow analyses.

Question 3: Librarians in a variety of roles are represented.

The largest group of participants, 36% (49) identified themselves as collection development/acquisitions librarians, while 16% (23) were reference librarians or instruction/training librarians. At least in theory, reference and instruction librarians could provide more reliable answers to questions related to the user experience (Questions 10 and 11), while collection development, acquisitions, administration, management, and technical services librarians would provide more reliable answers to questions related to the acquisition

and management of ebooks, but in practice, this difference would be difficult to detect in a sample size of 138. In addition, most collection development librarians have duties in reference and instruction, and many reference librarians have at least some collection development responsibilities.

Twenty percent (28) marked "other" as their role in the library. Most of these indicated that their jobs combined several roles, while others indicated that they are responsible for digital resources. Others listed a variety of other jobs. Among these are:

Archives and Web Librarian
Clinical Medical Librarian
Collection Development, Acquisitions, and Technical Services Librarian
Digital Information Resources Manager
Electronic Resources Librarian
Science Librarian

Questions 4-7: Rapid growth of ebooks in libraries is predicted.

Most participants in this survey work in libraries that have large digital collections. Fifty-nine percent (79) reported that their library's annual budget for electronic resources is over $250,000, and 62% (83) reported a budget over $100,000. Fourteen percent (19) do not know or declined to answer.

Within an institution, individual libraries may be more or less autonomous, and responses to questions 4-7 may reflect this autonomy. The medical library's budget, for example, may be separate from that of other libraries, and responses from the medical library may show only that library's budget and collection and not the collection and budget of the institution as a whole.

While most participants reported that their libraries spend more than $250,000 per year on digital materials, most also reported that their libraries spend little on ebooks at present. Sixty (44%) subscribe to or own fewer than 5,000 ebooks. For 67%, ebooks account for 10% or less of the acquisitions budget, and only one library currently spends more than 50% (in fact, more than 75%) of its acquisitions budget on ebooks. This may be an error, as this participant works at a medical college library and reported that this library owns or subscribes to 251-1,000 ebooks. This medical college library would have a very small collection if it spends more than 75% of its collection budget on fewer than 1,000 books.

Responses to Question #7 indicate that librarians predict rapid growth in ebooks in the next five years but that they expect to continue to purchase printed books also. In Question #6, 91 participants (67%) reported that ebooks currently represent less than 11% of their library's acquisitions budget. In Question #7, a similar number (86, 63%) indicate that in five years ebooks will represent 11% or more of their library's acquisitions budget.

The migration to ebooks suggested by the responses to Question #7 may be more dramatic than it appears at first. The question asks about ebooks in relation to the overall acquisition budget. In STM libraries, monographs account for a small part of the overall acquisitions budget, and if ebooks completely replace printed monographs, their percentage of the total budget would remain small. ARL statistics show that even for ARL libraries, which cover all subjects, the mean expenditure (2007-08) for monographs is 24%. Therefore, the 75 participants (55%) who indicated that ebooks will represent 11%-50% of their library's acquisition budget in five years may believe that by that time ebooks will represent nearly 100% of their monographic purchases.

Unfortunately this question is easily misinterpreted, and if the survey were repeated, the question could be presented more clearly. Eleven participants indicated that in five years ebooks will represent over 50% of their library's acquisition budget. Several of these participants work in academic health science libraries or other large academic libraries with large serial budgets, and it is unlikely that monographs, either print or digital, will ever represent more than 50% of their overall acquisition budgets. It is likely that they interpreted the question in relation to monographic acquisition budgets only. Still, their responses indicate a high degree of optimism regarding the future of ebooks in libraries.

In order to determine whether responses varied by institution type, responses to Question #7 were sorted on responses to Question #2 and summarized below. The first column shows responses from graduate/professional academic institutions (science, medicine, technology, humanities, social science, and law). The second shows responses from undergraduate academic institutions. Responses from other types of institutions are not shown. Participants who selected "Other" and entered a type that could be categorized as either a graduate or undergraduate academic institution are included as described above.

7. What percentage of your library's acquisition budget do you think ebooks will represent in 5 years?

Response	Graduate/Professional institutions	Undergraduate institutions
0%	0 (0%)	0 (0%)
1%-10%	13 (20%)	5 (13%)
11%-25%	25 (38%)	18 (46%)
26%-50%	10 (15%)	6 (15%)
51%-75%	3 (5%)	1 (2%)
>75%	4 (6%)	1 (2%)
Don't know/decline to answer	10 (15%)	8 (20%)
Total responses	65	39

It is difficult to see a trend in these numbers. However, one-fifth of participants from graduate institutions make the conservative prediction that ebooks will represent 1%-10% of their library's acquisition budget in five years, while only 13% of participants from undergraduate institutions indicated this. These results suggest that librarians at graduate institutions predict that in the future a smaller percentage of their collection budget will be spent on ebooks than librarians at undergraduate institutions. A possible reason for this is that at graduate institutions, a larger percentage of the collection budget is spent on journals. Therefore, while the migration to ebooks may occur at the same pace in the two types of institutions, the impact on the overall collection budget in graduate institutions will be smaller.

Question 8: Publishers and vendors are important sources of ebook information for librarians.

Survey responses indicate that librarians learn about ebooks in a variety of ways, but that actions by publishers and book vendors are very important in the process. Book vendors and inclusion in content packages were most frequently marked as very significant methods for learning about ebooks. However, these methods were also frequently marked as significant or very significant: request from patron (54), colleagues (57), reference in the research literature (56), inclusion in content package (74), book vendor (77), and publisher marketing material (68).

These results are not surprising. Currently, collection development in large academic libraries relies heavily on slips and approval books from book vendors and on announcements from publishers. Requests from patrons are best for ensuring that the collection conforms to the needs of the user community but in a good library, at least some of the patron's needs are anticipated by discovering and purchasing books before they are needed. Book vendors have developed ways in which librarians can select individual print titles quickly and easily from printed slips or, more recently, from similar electronic products. Equivalent selection tools are not widely available for ebooks, and they need to be purchased either individually or in packages. As ebooks are purchased in larger quantities by libraries, publishers and vendors need to develop tools that will help librarians with the selection process.

The least significant methods for learning about ebooks are blogs or other social media and website recommendations.

Twenty-two significant comments were made in response to the final part of Question 8: "If there is another important method not listed above, please describe it here". Eight of these emphasized the importance of consortia in discovery and acquisition of ebooks. Consortia are important in acquisition of ejournals and clearly librarians want to extend this familiar model to the less familiar format of ebooks. Three other participants mentioned that professional associations and meetings are useful for learning about ebooks.

Question 9: PDF is the preferred format but librarians want options.

Forty-one percent (53) of participants indicated that users prefer ebooks in PDF format. This strong preference for PDF is not surprising. Ebooks are new and most users have little experience with them in formats other than PDF. Only 12% of participants (16) indicated that HTML is the preferred format. This is a little surprising given that the standard for journals, both commercial and non-commercial, is to offer articles in both HTML and PDF.

Fourteen percent (18) of participants selected "other". Six of these commented that availability of ebooks in multiple formats is preferred, and four of these stated that both HTML and PDF formats are desirable.

Only four participants (3%) indicated that users prefer ebooks optimized for dedicated ebook devices or other mobile devices.   Two others selected "Other" and mentioned mobile devices. These results indicate librarians believe that there is a very low demand for ebooks optimized for ebook or mobile devices. However, the market for mobile ebook readers is changing rapidly and as one participant stated, "mobile device access may soon be the most important factor for most users."

Question 10: Users discover ebooks through the library catalog and through Internet search engines.

Librarians believe the library catalog is a very significant method for discovering ebook content. Only one participant indicated that the library catalog is not significant and 49 (40%) indicated that it is very significant. Google and other Internet search engines are also very significant. Other than this, it is difficult to detect any trends in the responses to this question. It might be worth noting that publisher websites are not particularly significant for discovering ebook content.

It is likely that librarians exaggerate the importance of the library catalog to their users and that a survey of users would show that the catalog is less significant as a tool for finding ebooks than librarians think it is. However, this does not change the fact that the catalog is the best tool for finding locally purchased content.

Only 12 participants made comments in the second part of Question 10: "If there is another important method not listed above, please describe it here." These comments did not show any common theme. Two described courseware or course syllabi, two others described federated search software, one mentioned social media, and one mentioned free trial access from publishers or vendors.

Question 11: Digital rights management hinders the use of ebooks.

The important message of the answers to this question is that the most significant factor that hinders users in their use of ebook content is digital rights management (DRM). Fifty-five participants (45%) rated this factor very significant, and 85 (69%) rated it significant or very significant. The preference for print is the second most important factor that hinders users in their use of ebooks. Lack of training and lack of content are not seen as significant factors that hinder use.

Ebooks can be difficult to navigate. This may or may not be related to DRM. It would have been useful to ask whether poorly designed interfaces are a significant factor that hinders use. "Difficult to read onscreen/online" may include navigation difficulties, and responses show that this is a moderately important factor that hinders use.

Reference and instruction librarians have more direct contact with users, and their answers to questions regarding the user experience may be more accurate than those of librarians in technical services, serials, collection development, digital resource management, administration, or other roles. In Question #3, 21 participants indicated that their role is Reference Librarian, while two others selected Instruction/Training Librarian. An additional 28 selected Other, and of these, two indicated that they have roles that are clearly in the reference and instruction area, while others were less clear. These two, along with the others who indicated that they work in reference and instruction roles, were included in the analysis below.

The analysis indicates that reference/instruction librarians do not differ significantly in their opinions on this question from other participants. Reference/instruction librarians have a slightly more negative opinion of digital rights management, with 48% indicating that this factor is very significant in hindering patrons in the use of ebook content. They also indicate that the preference for print is a more significant factor. It should be noted that no reference/instruction librarians indicated that "Difficult to read onscreen/online" is not significant. This suggests that this group sees current ebook interfaces as a problem for users.

11. Responses of Reference/Instruction Librarians. What hinders your patrons the most in their use of ebook content? Please rate the significance of each of the factors below.

Responses of Reference / Instruction Librarians	*Not significant*	*Somewhat significant*	*Significant*	*Very significant*	*No opinion / Don't know*	*Total responses*
Difficult to find/discover	3	5	5	4	3	20
Difficult to read onscreen/online	0	3	7	5	4	19
Difficult to annotate	2	5	7	2	4	20
Digital rights management (e.g.,	1	1	7	10	2	21

limited printing)					
Not available for preferred devices	4	4	4	0	7	19
Prefer print	0	4	6	6	4	20
Lack of content	6	1	5	4	5	21
Lack of training	3	6	4	3	4	20

11. Responses of other librarians. What hinders your patrons the most in their use of ebook content? Please rate the significance of each of the factors below.

Responses of other librarians	*Not significant*	*Somewhat significant*	*Significant*	*Very significant*	*No opinion / Don't know*	*Total responses*
Difficult to find/discover	7	31	28	28	9	103
Difficult to read onscreen/online	12	27	30	26	8	103
Difficult to annotate	19	22	28	18	16	103
Digital rights management (e.g., limited printing)	8	13	23	45	13	102
Not available for preferred devices	17	26	25	9	22	99
Prefer print	8	30	34	22	8	102
Lack of content	22	27	17	21	14	101
Lack of training	27	27	21	13	14	102

Nineteen participants made comments in the second part of Question 11: "If there is another important factor not listed above, please describe it here." Two describe the "clunky" interface of ebooks and the difficulty of moving from one page to another as a significant problem. At least one other comment addresses an interface issue in stating that color is not available on the Kindle. Three comments emphasize barriers related to printing and digital rights management. Two state that textbooks, which are the books in greatest demand, are not available to libraries. Another indicates that ebooks are in publisher "silos" that do not permit searching across content. However, it seems that this is the purpose of library catalogs (and Internet search engines), just as abstracting and indexing databases (and Internet search engines) serve this function for journals. Another participant comments that for clinical purposes, printed books are preferred because they allow quicker access, but it would seem that this point is at least debatable. Possibly this comment is really stating in another way that the ebook interface is generally "clunky". One comment states that ebooks are not available via interlibrary loan. Interlibrary loan and short-term access is a very serious concern that is not adequately addressed in this survey. A few comment in various ways on the price of ebooks. One comment expresses concern that poor students lack Internet connectivity and that rural areas lack high-speed access, while another notes poor support for visually impaired readers on some platforms.

One comment refers to the JISC National E-books Observatory Project Report, an excellent resource for studies of actual use:
http://www.jiscebooksproject.org/reports/finalreport

Question 12: Purchase with perpetual access is the most acceptable business model.

Librarians feel that the most acceptable model for acquiring ebooks is purchase with perpetual access. Ninety-six (83%) responses rated this option as very acceptable. Purchase with perpetual access through self-hosting is much less acceptable, probably because self-hosting is not a realistic option at many institutions. The subscription, purchase with maintenance fee, and purchase with update fee models are less acceptable than purchase with perpetual access, but none of these was strongly favored or disfavored. It is very likely that the size of the annual fee and the value or perceived value of the annual service or updates would determine the acceptance of an annual fee for ebooks.

The pay-per-use model was rated unacceptable by 43 participants (38%), more than any other model. This is a little surprising because pay-per-use has been used successfully to distribute journal article content to users who do not have subscribed access. However, in journal article pay-per-use, the library is not involved, and it is difficult to imagine a widely used ebook business model in which libraries would participate in pay-per-use. Libraries have experimented with pay-per-use in various forms, but because it is at odds with the need for predictable expenditures, the model has never been adopted on a large scale. Typically, early in the fiscal cycle, an allocation would be made to each of the library's programs. If one of those programs is pay-per-use, and if that program is more heavily used than expected, the allocation may be exhausted before the end of the fiscal cycle and users will be frustrated. If the program is less heavily used than expected, the library risks losing unused funds. All this does not mean that pay-per-use has no place in ebook business models, however. This model might be very useful in connecting users to unowned content.

Thirteen participants (11%) rated the concurrent seat access model unacceptable, while 21 (18%) indicated that it is very acceptable. It's surprising that this model is rated acceptable by a large number of participants, as it does not allow for spikes in usage and it requires the institution to purchase seats that remain unused much of the time in order to be in reserve for peak times. Possibly this model is considered acceptable because it is familiar and not because it serves libraries well.

Sixteen participants (14%) rated bundling of content unacceptable, while 10 (8%) indicated that it is very acceptable. This area needs further research. A large number of librarians believe that bundling of content by publishers without the option to purchase unbundled parts is the cause of much of what is bad in digital collection development. However, the option to purchase bundled content cannot in itself be considered bad.

Only nine participants made comments in the second part of Question 12: "If you prefer another model not listed above, please describe it here." One of these suggests a mixed palette of concurrent options to fit a variety of needs. Another suggests a consortium purchase with perpetual access through self-hosting. A third suggests open access. One participant states that the pricing of ebooks needs to be competitive with the paper-bound price, not with the cloth-bound, and that the ebrary model of a low threshold fee or flat maintenance fee is desirable. One participant emphasizes that bundling is not desirable and that it should be possible to select books on a title by title basis.

One interesting comment: "While I'm from a large library whose goal is to own things, e-books may change the landscape enough that providing access to more material might be preferable to limiting expenditures to what can be owned." The environment in which libraries exist will determine the ways in which they acquire and maintain information.

In order to determine whether responses varied by institution type, responses to Question #12 were sorted on responses to Question #2 and summarized below. The first table shows responses from graduate/professional academic institutions (science, medicine, technology, humanities, social science, and law). The second shows responses from undergraduate academic institutions. Responses from other types of institutions are not shown.

The most noticeable difference between the two tables is that over 18% of librarians at graduate institutions indicate that the subscription model is unacceptable, while only 16% of librarians at undergraduate institutions marked this choice. Librarians at undergraduate institutions also have a more favorable view of concurrent seat access. These findings are not surprising, as ownership of data is more important to graduate institutions, while serving immediate needs is more important at undergraduate institutions.

12. Response from graduate/professional academic institutions: How acceptable is each of the following business models for acquiring ebooks? Please rate each model.

Response from graduate/ professional academic institutions	Unacceptable	Somewhat acceptable	Acceptable	Very acceptable	No opinion / Don't know	Total responses
Purchase with perpetual access	1	2	5	45	1	54
Purchase with perpetual access through self-hosting	11	20	11	7	5	54
Subscription	10	20	18	6	0	54
Pay-per-use	21	21	5	5	3	55
Lease to own	12	23	9	1	7	52
Concurrent seat access	4	24	18	5	3	54

Bundled with other content	6	26	16	2	4	54
Patron-driven acquisition	10	8	17	11	8	54
Upfront purchase + maintenance fee	9	14	20	6	5	54
Upfront purchase + update fee	3	17	22	6	6	54

12. Response from undergraduate institutions: How acceptable is each of the following business models for acquiring ebooks? Please rate each model.

Response from undergraduate institutions	Unacceptable	Somewhat acceptable	Acceptable	Very acceptable	No opinion / Don't know	Total responses
Purchase with perpetual access	0	0	5	28	1	34
Purchase with perpetual access through self-hosting	5	13	8	2	5	33
Subscription	5	12	13	1	1	32
Pay-per-use	13	10	6	2	2	33
Lease to own	8	12	3	3	7	33
Concurrent seat access	5	3	4	9	12	33
Bundled with other content	5	9	10	4	4	32
Patron-driven acquisition	4	5	9	9	5	32
Upfront purchase + maintenance fee	5	10	14	2	2	33
Upfront purchase + update fee	4	13	12	3	1	33

Question 13: Ideally, usage drives selection decisions.

Usage statistics are the most important driver in ebook purchasing decisions, with 49 participants (44%) indicating that this is the most significant driver. It is difficult to know exactly what this means for the purchase of monographs. Do librarians review use of previous editions or of print versions before purchasing ebooks? Do they review usage statistics by subject or by publisher before purchasing additional books in a subject or from a publisher? Or are they trying to extend their experience with ejournals, where usage statistics are very valuable, to the new format? Even for ejournals, usage statistics are of little use in evaluating a new title for possible purchase unless trial access has been available for some time. Perhaps the message is that usage statistics are the best measure of the value of an ebook (or indeed of any bibliographic entity) to

a library's user population, and publishers and vendors can facilitate the selection of ebooks by offering free trials through other programs that give librarians the local usage statistics they need.

Book reviews are the least important driver, with 41 participants (40%) indicating that it is the least significant driver.

Bundling is a complex issue. A large number of participants indicated that inclusion in bundles is not a significant driver in purchasing decisions. In reality, bundles are important in purchasing decisions because large publishers offer some titles only in bundles. However, the large percentage of participants who indicate that bundling is not significant reflects the desire of librarians to control purchases on a title-by-title basis. In general, librarians want content to be available in unbundled form, as this gives them maximum control over purchasing decisions. Unbundled content prevents acquisition of lower-quality or out-of-scope materials with needed items. However, with bundles, publishers offer attractive pricing, and bundles can save time in selection, acquisition, and processing. Therefore, it is probably accurate to say that librarians want the option to purchase on a title-by-title basis but they also want the convenience of bundles. One participant stated in reply to this question, "availability as a single title purchase, NOT part of a bundle and NOT on an aggregator's website" is the most important driver of ebook purchasing decisions. Another stated, "…bundles…have worked well for us…we find those to be very similar to journal models and to date the best bundles have been provided by the BIG journal publishers."

Twelve participants made comments in the second part of Question 13: "If a driver not listed above is important, please describe it here." There is no consistent pattern in these comments. Two cite consortial purchases as important drivers. Other drivers that are mentioned are: availability as single-title purchases and not as bundles; distance-education needs; general interest and wide use of books are more likely to be purchased as ebooks; limited shelf space as a driver of ebook purchases; features and digital rights management restrictions; required use of titles in the curriculum; and 24-hour access. One longer comment emphasizes resistance to purchasing ebooks with restrictions on usage rights.

Question 14: A simple interface and the ability to discover content through the library catalog are important.

Simplicity and ease of use is the most important platform feature that influences ebook purchasing decisions. Eighty-three participants (73%) indicated that this feature is very important, and only one indicated that it is not significant.

Other significant factors are metadata/MARC record availability and integration with the OPAC. This is not surprising. Journal article indexes have long provided access to journal literature, but

aside from the library catalog, there are few well-established paths that provide access to book content.

Aside from simplicity and ease of use, this survey reveals little enthusiasm among librarians for added features in ebooks, including print on demand, compatibility with ebook readers, notetaking, personalization, and user sharing. Clearly there is support for these features. Sixty-two participants (55%) indicated that user personalization features are significant or very significant, and 27 (24%) indicated that user sharing features are significant or very significant. But these numbers are far below the value seen for the more basic simplicity and ease of use. Possibly a survey of ebook users would yield different results, but I think it reflects frustration with ebook designs that currently dominate the market in which interfaces are not intuitive and digital rights management is more important than ease of use.

Question #11 asks participants about the experience of users in relation to several features of ebooks. In Question #14, participants are asked about the influence of a similar list of factors on their ebook purchasing decisions. One wonders how directly the user experience as librarians see it influences purchasing decisions. To determine this, Question #11 was compared with Question #14 to determine which features listed in Question #11 seemed to relate most directly to the potential influences on purchasing decisions listed in Question #14. "Difficult to find/discover" could be remedied by "Metadata/MARC record availability" or by "Integration with OPAC". "Difficult to find/discover" could be mitigated by "Simplicity/ease of use".

After identifying these three pairs of hindrances/influences, responses of individual participants to these pairs of questions were compared in the tables below. For example, the first table shows that 23 participants who marked "Very significant" in Question #11 next to "Difficult to find and discover" also marked "Very significant" in Question #14 next to "Integration with OPAC".

These tables suggest that in general purchasing decisions do follow librarians' perceptions of the experiences of users. In the first table, nearly all participants who indicated that "Difficult to find and discover" is very significant in hindering the use of ebooks also indicated that integration with the OPAC is significant or very significant in purchasing decisions. Those who indicated that "Difficult to find and discover" is not significant or somewhat significant were less likely to indicate that integration with the OPAC is significant or very significant.

The second table compares "Difficult to find and discover" with "Metadata/MARC record availability". Here the correlation is less strong but it is still good. The third table compares "Difficult to read onscreen/online" with "Simplicity/ease of use". Here also the correlation is less strong. Forty-seven participants who indicated that "Difficult to find/discover" is a significant or very significant factor that hinders patrons in their use of ebook content also indicated that "Simplicity/ease of use" is very significant in their ebook purchasing decisions. However, 29 participants who indicated that "Difficult to find/discover" is not significant or somewhat significant indicated that "Simplicity/ease of use" is very significant. This analysis suggests that

when making ebook purchasing decisions, librarians consider the factors that hinder their patrons in their use of ebook content but that other factors are considered also.

Comparison of Question #14 with Question #11: Table 1

	Question 14: **Influential platform features—Integration with OPAC**				
Question 11: What hinders use of ebook content?— Difficult to find and discover		Not significant	Somewhat significant	Significant	Very significant	No opinion /Don't know
	Not significant	0	4	2	4	0
	Somewhat significant	2	4	9	19	1
	Significant	0	5	6	19	0
	Very significant	1	0	3	23	1
	No opinion / Don't know	0	3	0	6	0

Comparison of Question #14 with Question #11: Table 2

	Question 14: **Influential platform features—Metadata/MARC record availability**				
Question 11: What hinders use of ebook content?— Difficult to find and discover		Not significant	Somewhat significant	Significant	Very significant	No opinion / Don't know
	Not significant	0	3	4	3	0
	Somewhat significant	3	10	4	18	0
	Significant	0	6	10	13	0
	Very significant	0	1	9	15	0
	No opinion / Don't know	0	2	1	4	2

Comparison of Question #14 with Question #11: Table 3

	Question 14: **Influential platform features—simplicity/ease of use**				
Question 11: What hinders use of ebook content?— Difficult to read onscreen/online		Not significant	Somewhat significant	Significant	Very significant	No opinion / Don't know
	Not significant	0	1	5	6	0
	Somewhat significant	1	2	3	23	0
	Significant	0	1	9	23	0
	Very significant	0	0	5	24	0
	No opinion /Don't know	0	0	3	7	0

Eleven participants made comments in the second part of Question 14: "If a feature not list above is important, please describe it here." Two of these emphasize the importance of the ability to print at least a chapter at a time without digital rights management rights restrictions. Two others indicate that interlibrary loan rights are important. Two others indicate that it is important to be able to share content with consortium partners. Finally, two participants emphasize that basic functionality, ease of use, and ability to print are basic but important features and that at least some of the features listed in the matrix of this question might be nice to have but are not very important in comparison with basic functionality. This sentiment is clearly reflected in the answers above, in which a very large percentage of participants indicated that simplicity and ease of use are very significant factors in influencing purchasing decisions.

Question 15: Librarians dislike digital rights management restrictions in their current forms.

Participants in this survey generally expressed a negative opinion of digital rights management. Limited downloading received the least negative response, with 22 participants (19%) indicating that it is acceptable or very acceptable and only 39 (34%) indicating that it is unacceptable. Limited length of access and no interlibrary loan are the most unacceptable forms of DRM. While the reaction to limited printing was negative (44% indicated it is unacceptable), it is not the most unacceptable form of DRM. This is surprising given the extreme frustration it regularly causes library patrons.

Question 16: Most participants report purchasing at least some ebooks directly from publishers.

Most participants in this survey purchase some ebooks. Only seven participants indicated that they do not purchase ebooks from any source. Most purchase ebooks directly from the publisher. Taken together, the aggregators listed in this question have a large market share, but direct purchases from publishers have a market share of similar size. Thirty-four participants listed vendors other than those listed in the survey from which they purchase ebooks. The vendors listed by participants are:

- Books@Ovid (12)
- StatRef (7)
- AccessMedicine (6)
- MD Consult (6)
- Oxford Reference (4)
- R2Library (Rittenhouse) (4)
- Elsevier (3)
- Springer Ebooks (3)

- Books 24x7 (2)
- Knovel (2)
- SAGE (2)
- Dawson
- Early English Books Online
- EBSCO
- ENGnetBase
- Gale

- Greenwood
- History Ebooks
- IGI
- Karger
- Lange

- Lippincott
- McGraw-Hill
- SuperStar
- Thieme Verlag
- Wiley-Blackwell

Question 17: Preferred ebook sources include publishers, vendors, and aggregators.

It is interesting to notice the difference between the number of participants who indicated that they purchase or subscribe to ebooks from the vendors in Question #16 and the number who prefer to purchase ebooks from that vendor as indicated in Question #17. Less than one-third of NetLibrary's subscribers indicated that they prefer to purchase ebooks from that vendor. Safari's percentage is about the same, but ebrary does considerably better with more than half of subscribers naming that platform as a preferred one. It appears that librarians are more satisfied with book vendors and subscription agents and with publishers as providers of ebooks than they are with aggregators.

Twenty-one participants listed vendors other than those listed in the survey from which they prefer to purchase ebooks. The vendors listed by participants are:

- R2Library (Rittenhouse) (4)
- AccessMedicine (2)
- Books@Ovid (2)
- Oxford Reference (2)
- SAGE (2)
- ABC-Clio
- Dawson

- EBSCO
- Elsevier
- History Ebooks
- McGraw-Hill
- Springer Ebooks
- StatRef
- Wiley-Blackwell

Question 18: Content influences the choice of ebook vendors.

Sixty-seven participants answered this open-ended question and some wrote quite lengthy answers regarding qualities that influence preferences for ebook vendors. Those comments are summarized above.

There are several recurring comments among the responses to this question. Thirteen participants indicated that relevance and quality of content are important with nine stating that that the availability of relevant titles, and four others stating that high quality of content, are important factors that influence preferences for ebook vendors. A cluster of participants also focused on ease of access and use, quick access and response time, searching, and other interface features. Others focused on digital rights management and the ability to view and print

entire chapters and to download chapters in PDF format. Related to this was one negative comment regarding proprietary ebook reader software.

Several comments indicate that librarians are concerned with integrating ebooks into their existing print book acquisition and cataloging systems. They want to be able to purchase ebooks through their print book vendors, to obtain the content at the same time as the print book, and to pay for the content in the same way. At least some want to be able to select titles individually, though in Question #12 above, a significant minority indicated that bundling is an acceptable or very acceptable business model for ebooks. They want the price of the ebook to be comparable with that of the print book also, though comparable price is not precisely defined.

Responses to Question #17 indicate that a large percentage of participants prefer to purchase ebooks directly from publishers. In the comments submitted in response to Question #18, participants suggested that they prefer purchasing from publishers because aggregators place too many restrictions on use. This is not surprising. Responses to Question #11 show that librarians regard digital rights management as an important factor that hinders the use of ebooks and DRM is generally more restrictive in aggregator sites than in publisher sites. However, one participant noted that aggregators are preferred because they can offer titles from a variety of publishers.

Finally, several participants value discoverability. This includes the availability of MARC records, but includes the ability to find the digital version if the print version is known, and the availability of a list of available titles on the ebook website.

Question 19: Price, business model, and end-user features are the most important considerations when an ebook is available from multiple sources.

Price is the most important factor in determining which source is selected when an ebook is available from multiple sources. Other important factors are end-user features, fewer DRM-related limits, ease of account administration, and business model.

Sixteen participants marked "Other (please specify)" and made comments. One of these indicated that the ability to load data locally or consortially would lead to purchasing directly from the publisher. Another indicated that it is desirable to work directly with the copyright holder and not with an aggregator. A third noted that systems offered by publishers are often better because they are simpler. The reason for this may be because publishers develop less elaborate DRM tools. This participant stated:

"Simplicity for us and the user is more important than feature sets which most users will not learn and libraries do not have time or access to teach. All the web tutorials in the world, won't

get most users to learn feature sets beyond the most basic. Most college students don't exploit even the Advance Search screen in Google.”

Two participants suggested that consortial agreements would lead to purchasing directly from the publisher. Other comments were: title bundles, ease of obtaining usage reports, few license problems, interlibrary loan rights, simultaneous publication with print, off-campus IP access, and a perpetual access agreement. It seems that DRM and perpetual access are two areas where publishers could work directly with subscribing institutions.

Question 20: Price, content, ease of use, discoverability, bundling, rights, and licensing are all important to librarians purchasing ebooks.

Forty-two participants made comments in response to Question #20: "Are there any additional important factors not covered above that publishers should consider when publishing ebooks?” Those comments are summarized above.

Many of the themes seen in these comments have appeared in earlier questions. Librarians want MARC records. They want the freedom to select ebook titles individually or in subject packages. They want ebook content to be released simultaneously with print if not sooner. They see room for improvement in user interfaces and they complain that DRM interferes with printing and downloading.

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