SECOND ANNUAL SURVEY
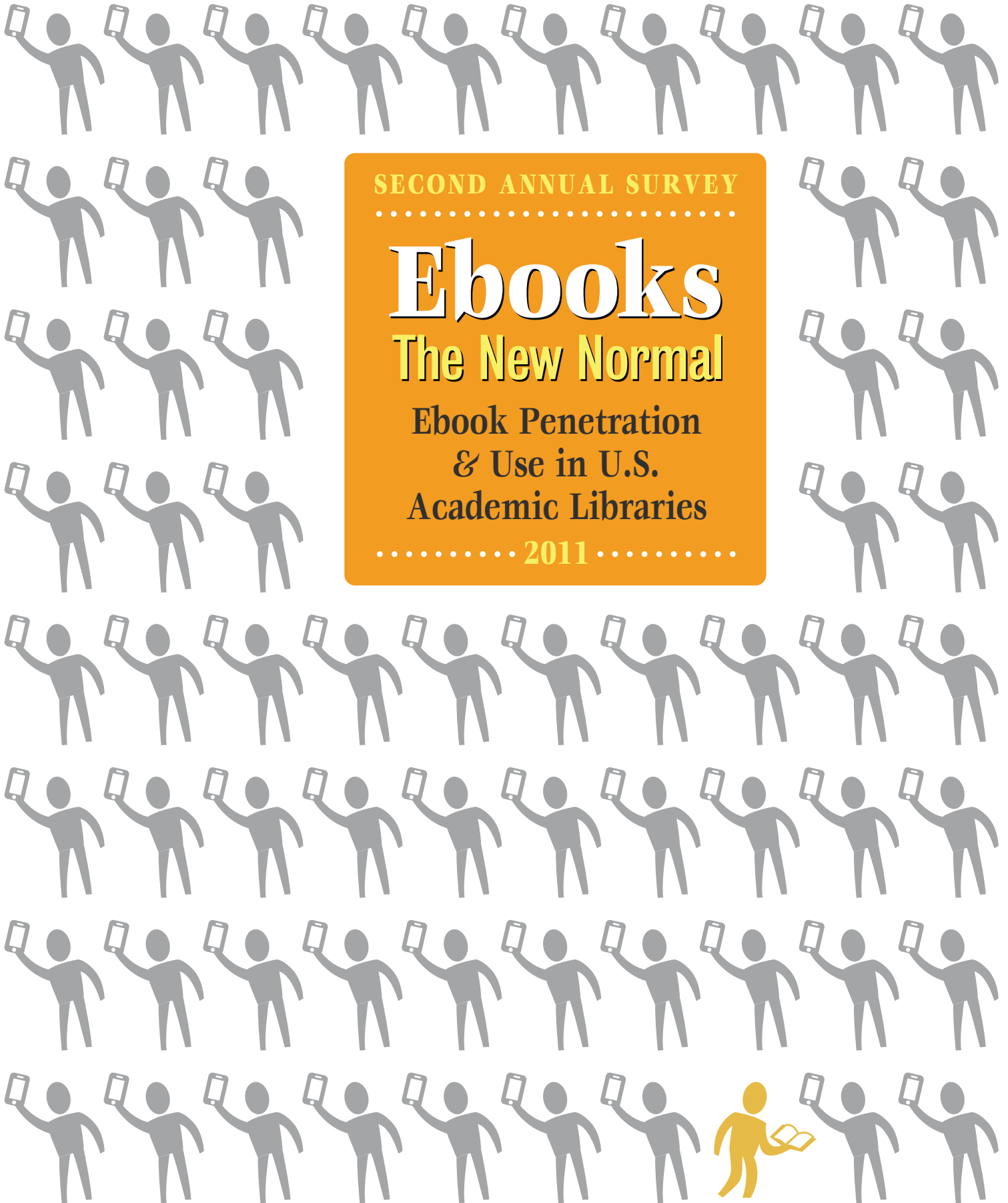
Ebooks
The New Normal

Ebook Penetration & Use in U.S. Academic Libraries

2011

RESEARCH
LIBRARYJOURNAL / School Library Journal

Survey of Ebook Penetration & Use in U.S. Academic Libraries

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EXECUTIVE SUMMARY

Almost all academic libraries are now offering ebooks, and demand for them is on the rise. A full 95% of the 488 respondents to our second annual survey currently offer ebooks to users, inching up one percentage point from last year. When asked if academic libraries had seen an increased demand for ebooks from users in the past year, more than half of respondents (58%) agreed they had —13% reported they saw a "dramatic" increase.

Growing Ebook Collections

The breadth of library ebook offerings is the real story to come from this survey. The average size of academic library collections has almost doubled in the past two years. The number of ebooks carried increased from an average of 33,500 ebooks in 2010 to more than 65,000 a year later. Graduate and professional institutions are likely to have more ebooks than undergraduate or community colleges, and saw the biggest increases in titles offered.

Average number of ebooks offered in…	2010	2011
Graduate/Professional libraries	37,480	97,507
Undergraduate libraries	30,964	60,593
Community College/2-year libraries	21,489	25,214

Projected usage and faculty requests are driving ebook purchasing at academic institutions.

> "The faculty are just waking up to the possibilities. We expect that ebooks will take off soon."

Looking ahead, two-thirds of academic libraries (67%) are confident ebook circulation will continue increasing over the 2011-2012 academic year. When our sample was asked to estimate the percentage change in ebook circulation, the overall average computes to +17%.

Undergraduate institutions and community colleges project slightly larger circulation increases for 2011-2012 than in the previous academic year while graduate/professional level institutions anticipate fairly flat circulation growth. This is not too surprising, given that many of the ebook titles owned by graduate level libraries are reference materials and these holdings generally do not circulate.

Ebook Spending

Spending on ebooks has been impacted, and is also expected to keep rising. The average amount spent on ebooks by respondents during the 2010–2011 academic year was $65,000 (median $17,500). If projected over the library universe (and accounting for libraries not offering ebooks), academic libraries nationwide spent close to $249 million on ebooks last year.

Average amount spent on ebooks in 2010-2011 academic year	*2011*
Graduate/Professional libraries	$142,000
Undergraduate libraries	$36,000
Community College/2 year libraries	$14,000

Currently, ebooks represent an average of 8.7% of academic libraries' total acquisitions budgets, up 2% over last year. Graduate/professional institutions (10.5%) and community colleges (9.9%) dedicate the highest percentage of acquisition budgets toward ebooks.

Five-year off projections for ebook spending are tremendous, with more than a third of respondents speculating that ebooks will represent greater than 25% of their acquisition budgets. On average, institutions that offer ebooks predict that ebooks will represent 19.1 % of their acquisition budgets by 2016.

Ebook Subjects

By far the largest categories of ebooks carried by academic libraries are general non-circulating reference materials and scholarly monographs. General trade fiction and bestsellers are not generally offered. Science, technology, social science and business titles are the most likely disciplines presently offered in digital form.

When asked to predict which disciplines would increase in ebook usage over the next 2 to 3 years, no real breakaway emerged. Science and technology head the list, but the numbers are somewhat even with last year. It is logical that growth in certain disciplines will flatten, as libraries accumulate many backlist or "evergreen" titles. Expectations for ebook collection growth is lowest for law and humanities titles.

In which discipline(s) do you project the greatest growth…	*2010*	*2011*
Science	66%	61%
Technology	62%	59%
Social Sciences	63%	54%
Business	n/a	54%
Medicine	54%	53%
Humanities	50%	42%
Law	35%	29%
Other	36%	7%

User Experience

Library users confront a variety of barriers to access of ebooks in academic libraries. The top factor remains "unaware of ebook availability." Surprisingly, "users prefer print" rose to second place. Last year's number two issue, "difficulty with DRM," dropped below discovery issues.

> "When looking for an article students love electronic. When looking for a book, they want to hold it and physically turn its paper pages."

Some users may prefer print, but ebooks' 24/7 availability and remote access are big selling points with students.

Barriers to user ebook access...	2010	2011
Unaware of ebook availability	62%	58%
Users prefer print	40%	47%
Difficult to read onscreen/online	52%	45%
Difficult to find/Discover	32%	38%
Digital rights management issues	55%	35%
Not available for preferred devices	23%	32%
Lack of training	26%	28%
Difficult to annotate	32%	26%
Ebook titles not available concurrent with print release	n/a	22%
Limited access to ereading devices	20%	19%
Faculty resistance	n/a	18%
Complex downloading process	14%	18%
High demand titles not available for libraries	n/a	17%
Long wait times for ebooks	n/a	4%
Awkward interface	35%	n/a
Limited titles available	41%	n/a
Other	7%	10%

In some good news, the number of libraries citing that users never report technical problems grew from 8% last year to 19%. A third of respondents (35%) still reported that users sometimes encounter technical problems when downloading ebooks.

Ebook Readers and Formats

The personal laptop or computer remains the top hardware device on which students/faculty read ebooks, cited by 72% of respondents—down from 84% last year. Other devices used to read ebooks are diversifying slowly, with minor growth in dedicated ebook readers (16%, up from 12% last survey). Reading on other portable devices such as mobile phones lost a little ground as an application overall, but remains popular among graduate level users (24%).

> "Students have said they might use an ebook reader if they could have access to textbooks and be able to highlight and take notes the way they do with textbooks."

Device(s) on which library users most often read ebooks...	2010	2011
Personal laptop/ Computer/Netbook	84%	72%
Library computer	70%	62%
Other portable device	22%	17%
Dedicated ebook reader	12%	16%
Don't know	9%	16%
Other	1%	4%

As for ebook formats, basic PDF remains the preferred format for academic users, however those optimized for ereading devices and mobile did make gains from 13% to 23%, and 14% to 22%, respectively last year.

Preferred ebook format(s) by users...	2010	2011
PDF	53%	54%
Full text HTML	32%	28%
Optimized for dedicated ebook device	13%	23%
Optimized for other mobile device	14%	22%
ePub	16%	19%
Other	2%	4%
Don't know	40%	33%

Towards a Fair & Realistic Licensing Model

The ideal ebook licensing model remains beyond the horizon. More often than not academic libraries purchase ebooks with "perpetual access," or through a subscription. "Concurrent seat access" has gained in popularity in the past year, climbing from 21% to 44% of academic libraries.

Asked what they feel would be a fair and realistic ebook licensing model, an overwhelming 73% of all respondents noted "maximum access" through which multiple users are allowed simultaneous access. Patron driven acquisition, which is being widely experimented with, ran a distant second at 49%.

Fair and realistic purchasing model...	
Maximum access (multiple users allowed simultaneous access)	73%
Patron driven acquisition model (multiple titles available, purchase based on holds)	49%
Unlimited circs using one reader/one book model	42%
Opportunity to license for varying # of circulations	27%
2 year interval	8%
Lending cap model	6%
1 year interval	5%
Other	7%

Libraries & Their Vendors

NetLibrary, Gale/Cengage, and Ebrary are the top three most patronized ebook vendors. As for the most preferred ebook vendors, Yankee Book Peddler received the majority of responses (25%) from graduate/professional level libraries. Ebrary topped the list for undergraduate institutions and NetLibrary edged out among the community college libraries.

The most vitally important attribute of ebook vendors is "ease of use for library users"—this was either very important or important for just about every respondent to this survey. Other top attributes were "free MARC records for the library OPAC to support discovery," "print-on-demand capability," and "easy to use administrative portal."

> "The more "book-like" the ebooks are, the more the students seem to like them. (in other words, they have page numbering just like the print book has, illustrations, table of contents, book cover art, etc.) With those features, they identify the ebook as a "book" more easily, and feel more comfortable with using it as a "book" source for their papers and assignments. If it is just html with no pagination, they see the ebook as just another website."

Conclusions

Ebooks have a firm footing in academic libraries. Nearly all academic libraries offer at least some ebooks. The average size of their ebook collections has almost doubled since 2010 and circulation experienced year over year double digit increases, largely driven by patron demand.

Libraries now need to address the obstacles to student and faculty use of ebooks. At the top of the pile of issues are basic awareness that ebooks are available and a continued emphasis on the use of print for research. Our research indicates a preference by users of digital for articles and abstracts and of print for long-form reading.

As ebooks become more common it seems likely that they'll see more and more adoption in the academic sphere, especially as libraries market them better, as they get integrated into the research process as distinct from articles, and as the process of discovery gets simplified.

INTRODUCTION

About the 2011 Library Journal *Ebook Survey*

Our latest survey repeats the majority of questions from last year's survey, and in many places yields some interesting trends, even if the changes aren't as pronounced as what we found in the public libraries version of this study. After al1, academic libraries were largely ahead of the curve, so changes from last year to this year have been more incremental and less dramatic than we have seen in other versions of this survey.

We asked some new questions, some follow-up questions to what was asked on the first survey, and used the results of that first survey to tailor some of the answer choices on the questionnaire.

Two open-ended questions were included, the first of which solicited comments from academic libraries' about ebooks in general. We had a limited response to this question relative to the general response of the survey as a whole, and a disproportionate amount of these write-ins skewed toward those who were skeptical about ebooks or who were experiencing limited demand or integration with their collections. These verbatim responses seemed somewhat discordant with the quantitative data gleaned from this survey, but with this caution in mind, still provide some valuable insights and express important and relevant concerns. A selection of these responses are added at the ends of Chapters 2, 3, and 4.

We also repeated the open-ended question from last survey, "What do you need from publishers/vendors to make incorporating ebooks easier?" These responses appear at the end of Chapter 5.

The methodology and questionnaire are included in the Appendix.

Structure of this Report

The bulk of each chapter provides top-level survey results in chart form—in essence, the "all responses" results, or what all libraries surveyed said about a specific question. This gives an overall idea of the prevailing attitude.

Each chart includes both the 2011 data as well as the 2010 data (where the same question was asked in 2010) for comparison. We've indicated on the charts where we altered some of the response choices from the last survey. Phrasing of responses and even the order of responses on a questionnaire can have profound effects on the results one gets, but we feel confident that the vast majority of the responses support a comparison with last year's survey. However, in those cases where data are not completely congruent, we've called attention to it. In some cases, adding both surveys' datasets would have made a chart unreadable, so we elected to use just the 2011 data and highlight any substantial changes in the accompanying commentary.

Each chart is followed by a corresponding table that breaks down the survey responses by type of library (graduate, undergraduate, or community college),

whether it is public or private, and size of acquisition budget. We also included the 2010 data for those who want to compare the entirety of both datasets.

For More Information

For questions or comments regarding this study, please contact our research manager Laura Girmscheid by phone (646) 380-0719 or by e-mail at lgirmscheid@mediasourceinc.com.

1. PROFILE OF RESPONDENTS

Type of Library

As the chart below shows, 44% of the academic libraries responding to this questionnaire described themselves as "undergraduate," while 44% described themselves as "graduate/professional." Twenty-two percent were community colleges.

Figure 1. Q3: Which of the following best describes your library? —All academic libraries
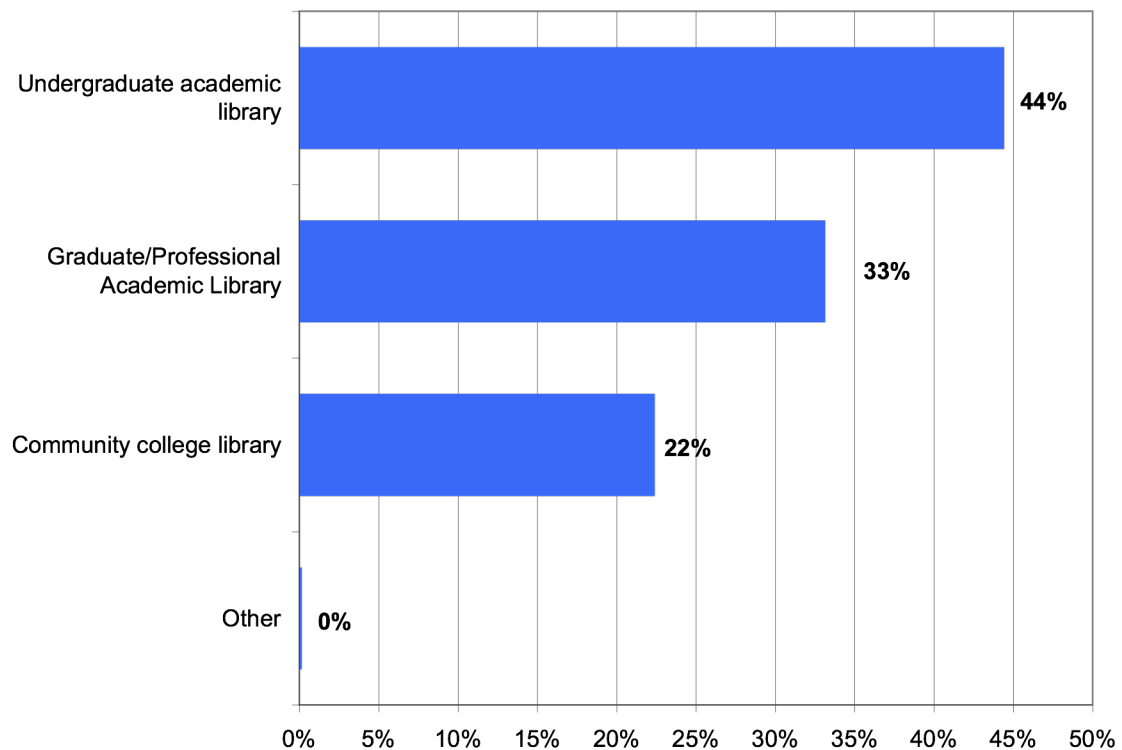
We had also asked about specific disciplines covered in graduate/professional institutions:

Graduate/Professional: Science, Medicine, Technology	12%
Graduate/Professional: Humanities	10%
Graduate/Professional: Social Science/Law	8%

Public or Private

Nearly six out of 10 (59%) academic libraries responding to our survey serve public institutions, while 41% serve private academic institutions.

Figure 2. Q4: Is your institution public or private? —All academic libraries

Private
41%
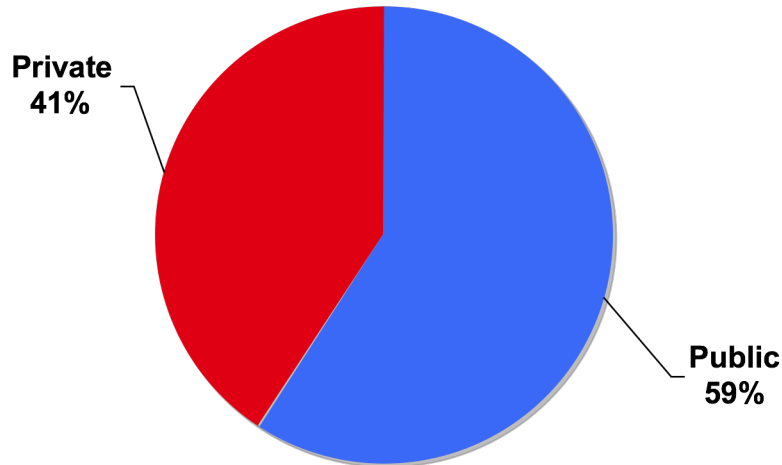
Public
59%

The following table breaks the public/private data down by type of institution and acquisition budget.

Table 1: Q4: Is your institution public or private? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Acquisition Budget		
	Graduate/ Prof'l	Undergrad	Community College	< $100K	$100K– $999K	$1 Mil+
Public	52%	49%	90%	57%	57%	63%
Private	48%	51%	10%	43%	43%	37%

Number of Volumes in Library

Academic libraries responding to our survey have an average of 806,000 volumes in their collections (mean: 796,400/median 207,400).

Figure 3. Q5: What is the total number of volumes in all subject areas in your library? —All academic libraries
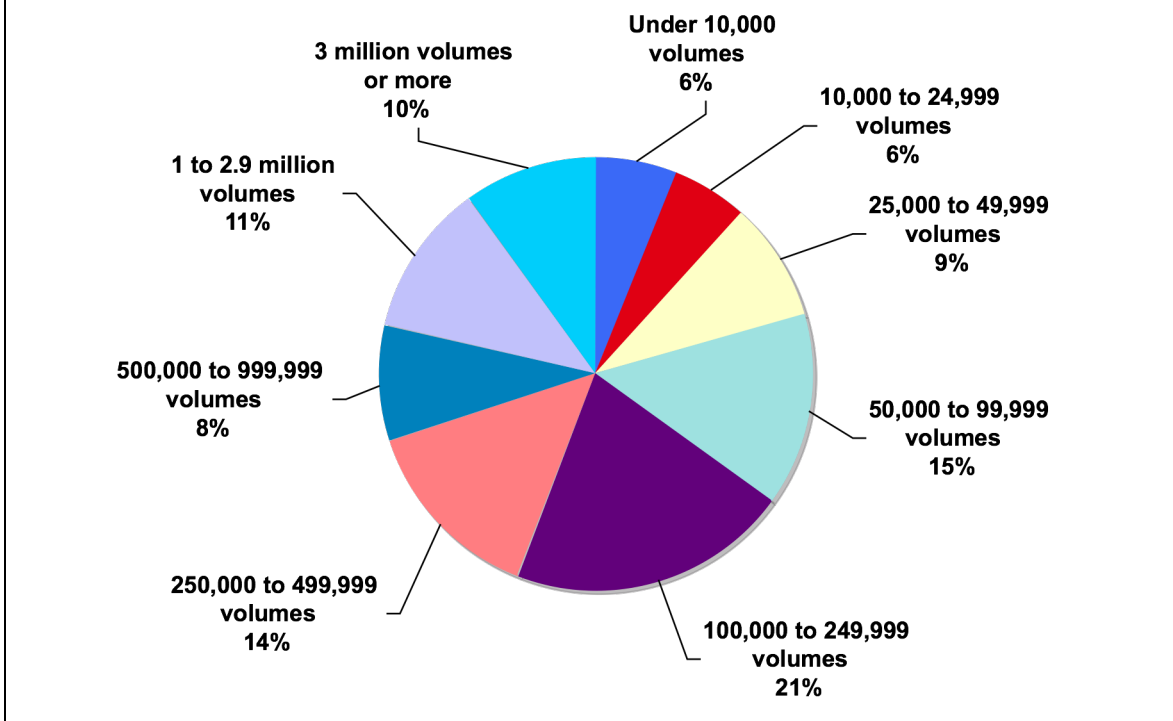
Table 2. Q5: What is the total number of volumes in all subject areas in your library? —Academic libraries by institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Under 10,000 volumes	5%	3%	13%	5%	8%	19%	2%	0%
10,000 to 24,999	5%	3%	13%	5%	7%	13%	4%	2%
25,000 to 49,999	5%	4%	23%	10%	6%	19%	6%	3%
50,000 to 99,999	8%	9%	36%	16%	12%	30%	14%	2%
100,000 to 249,999	14%	30%	14%	14%	33%	17%	37%	3%
250,000 to 499,999	11%	24%	1%	15%	14%	1%	26%	14%
500,000 to 999,999	11%	11%	0%	10%	6%	1%	9%	15%
1 to 2.9 million	18%	12%	1%	15%	6%	0%	2%	34%
3 million+	23%	5%	0%	10%	6%	0%	2%	27%
Mean # volumes (000)	1,456.40	653.63	85.68	870.56	553.78	72.90	332.91	1,942.46
Median # volumes (000)	606.93	261.36	52.02	249.95	174.95	48.86	200.27	1,659.24

Acquisition Budget

The mean acquisition budget for the current school year for academic libraries responding to our survey was $1.375 million (median acquisition budget was $368,100). Just over one-fourth of respondents (28%) reported that their total acquisition budget for the current year was less than $100,000, while 33% reported that their total acquisition budget was over $1 million.

Figure 4. Q6: What was your library's total acquisition budget (print and digital) for this school year? —All academic libraries
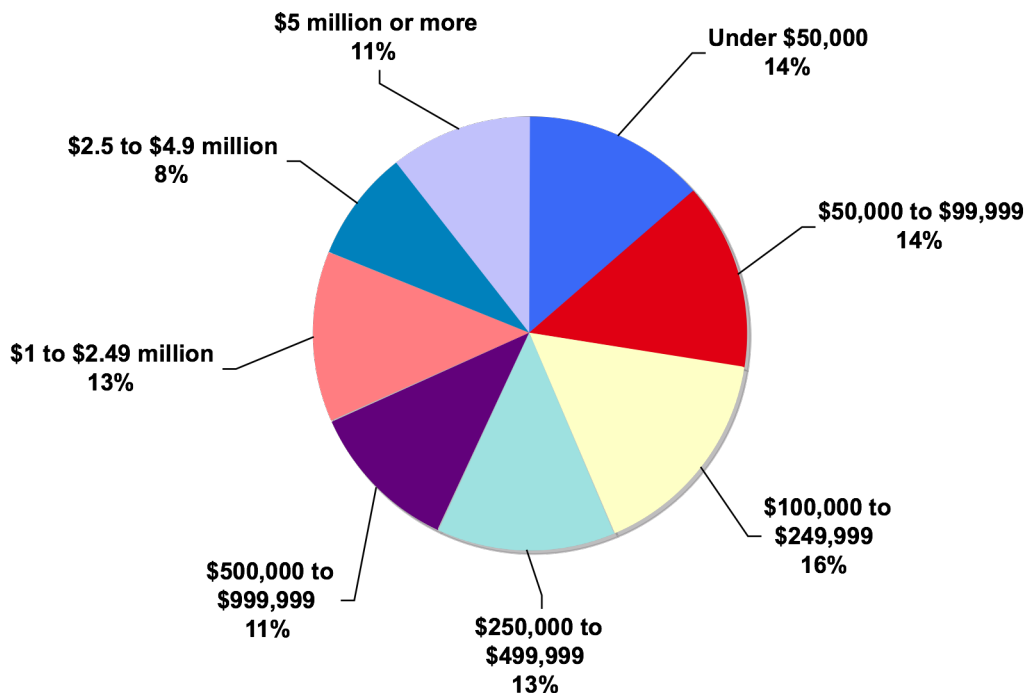
Acquisition budgets in graduate/professional level academic libraries are, on average, more than twice as high as those in undergraduate libraries. Public academic institutions have library acquisition budgets roughly one and a half times that of private institutions.

Table 3. Q6: What was your library's total acquisition budget (print and digital) for the 2010/2011 school year? —Academic libraries by type of institution

	Graduate/ Prof'l	Undergrad	Community College	Public	Private
Under $50,000	9%	7%	34%	13%	15%
$50,000 to $99,999	6%	11%	32%	14%	14%
$100,000 to $249,999	9%	18%	24%	14%	19%
$250,000 to $499,999	8%	21%	7%	14%	15%
$500,000 to $999,999	9%	18%	3%	12%	10%
$1 to $2.49 million	20%	14%	0%	10%	16%
$2.5 to $4.9 million	15%	7%	0%	12%	3%
$5 million+	26%	5%	0%	10%	8%
Mean	2,619,500	1,073,900	125,700	1,436,900	1,054,300
Median	1,778,300	426,400	74,500	404,000	277,700

Library Location

The following figure shows the geographical location of the libraries responding to our survey, based on U.S. Census Bureau regional classifications:

- New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

- Mid-Atlantic: New Jersey, New York, Pennsylvania

- South Atlantic: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia, District of Columbia

- East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin

- West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota

- East South Central: Alabama, Kentucky, Mississippi, Tennessee

- West South Central: Arkansas, Louisiana, Oklahoma, Texas

- Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming

- Pacific: Alaska, California, Hawaii, Oregon, Washington

These nine regions are also grouped into four larger U.S. regions:

- Northeast: New England and Mid-Atlantic

- Midwest: East North Central and West North Central

- South/Southwest: South Atlantic, East South Central and West South Central

- West: Mountain and Pacific

Figure 5. Q1: In which region of the country is your library located? —All academic libraries
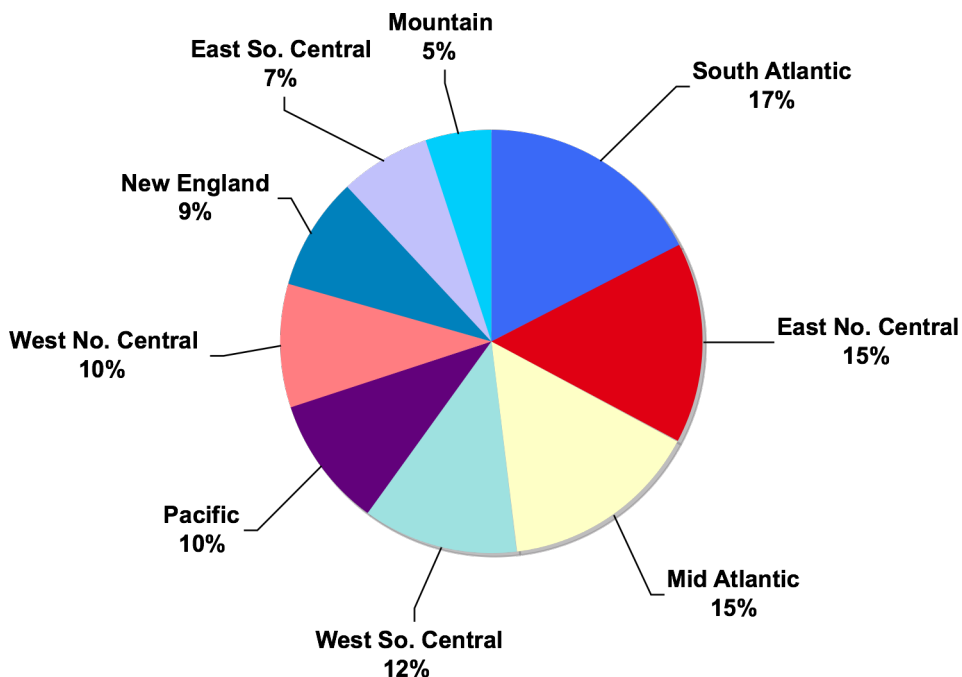
The following table sorts the academic library respondents by the four larger regional classifications:

SOUTH/SW	36%
MIDWEST	25%
NORTHEAST	24%
WEST	15%

Table 4. Q1: In which region of the country is your library located? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
South Atlantic	18%	17%	18%	20%	15%	19%	16%	18%
East No. Central	16%	15%	15%	15%	16%	15%	16%	14%
Mid Atlantic	15%	19%	8%	12%	19%	9%	17%	17%
West So. Central	11%	10%	16%	17%	5%	11%	14%	10%
Pacific	12%	9%	10%	10%	10%	10%	8%	12%
West No. Central	6%	11%	12%	10%	10%	11%	9%	10%
New England	11%	9%	5%	5%	13%	10%	8%	8%
East So. Central	4%	8%	8%	6%	8%	9%	8%	4%
Mountain	6%	4%	6%	5%	4%	4%	4%	8%
MIDWEST	22%	26%	28%	25%	26%	26%	25%	24%
NORTHEAST	26%	27%	13%	18%	32%	20%	26%	25%
WEST	18%	12%	16%	15%	14%	15%	12%	20%
SOUTH/SW	33%	35%	43%	42%	28%	39%	38%	32%

Respondent Job Title/Ebook Recommendation Authority

Who in the library specifically answered our survey?

Most respondents identified themselves as the library director/assistant library director (28%) or the reference or information services librarian (19%). Ten percent identified themselves as the head librarian or department head.

Figure 6. Q2: Which of the following comes closest to your job title? —All academic libraries

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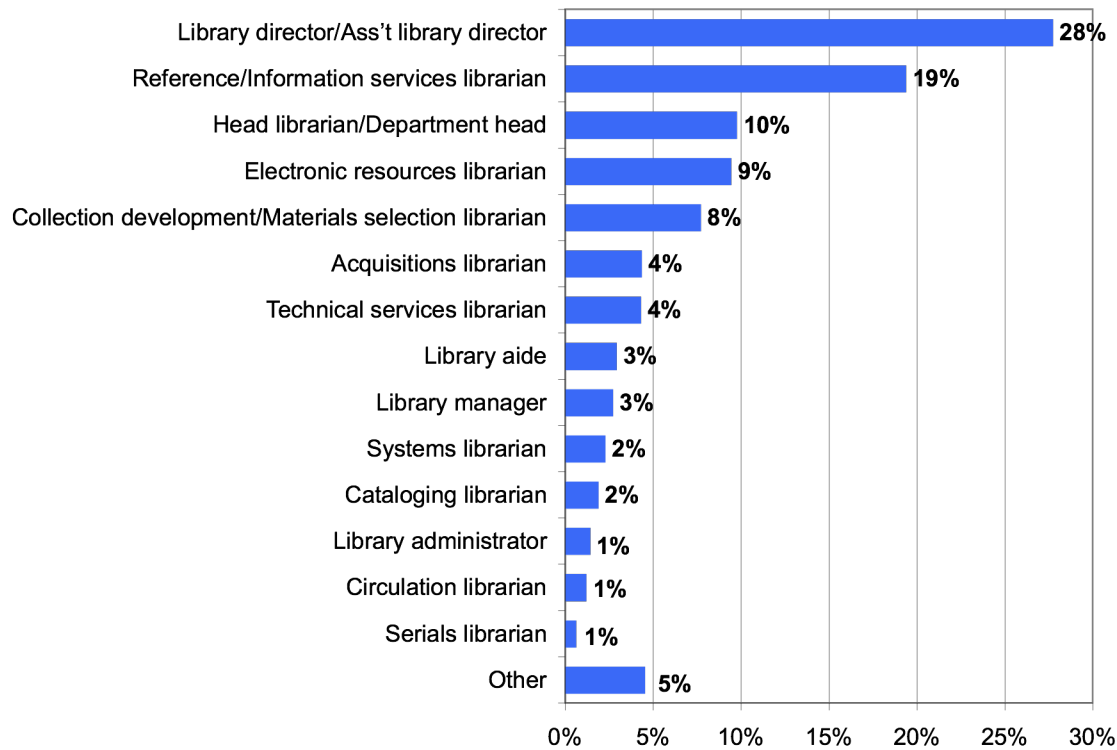
In private institutions, our survey was most likely to be filled out by the library director or assistant director (36%), while in public institutions, it was equally likely to have been completed by the library director/assistant director or the reference/information services librarian (both 22%).

Table 5. Q2: Which of the following comes closest to your job title?
—Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Library director/Ass't library director	27%	26%	32%	22%	36%	34%	31%	19%
Reference/Information services librarian	20%	18%	23%	22%	15%	15%	19%	21%
Head librarian/ Department head	11%	9%	10%	11%	7%	12%	8%	10%
Electronic resources librarian	7%	11%	10%	11%	7%	9%	9%	12%
Collection development/ Materials selection librarian	11%	8%	2%	8%	7%	2%	7%	13%
Acquisitions librarian	5%	5%	2%	5%	3%	0%	5%	8%
Technical services librarian	3%	5%	5%	5%	3%	5%	5%	4%
Library aide	5%	2%	2%	2%	4%	5%	3%	1%
Library manager	2%	3%	5%	3%	3%	4%	3%	2%
Systems librarian	2%	3%	1%	2%	3%	3%	2%	3%
Cataloging librarian	5%	1%	0%	1%	3%	2%	2%	1%
Library administrator	1%	2%	2%	1%	1%	2%	2%	1%
Circulation librarian	1%	2%	0%	1%	2%	2%	2%	1%
Serials librarian	0%	0%	2%	1%	1%	1%	1%	0%

Ebook Purchase/Recommendation Authority

The vast majority of respondents (84%) said that they *are* involved in the ebook purchasing or recommendation process.

Figure 7. Q31: Are you involved in the recommendation/purchasing process of ebooks for your library? —All academic libraries
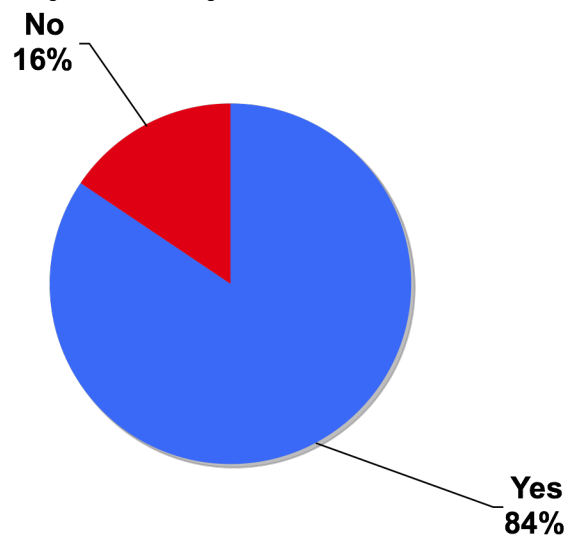
Table 6. Q31: Are you involved in the recommendation/purchasing process of ebooks for your library? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
Yes	85%	84%	83%	88%	77%	82%	85%	86%
No	15%	16%	17%	12%	23%	18%	15%	14%

Onward

Our sample of academic libraries was evenly distributed throughout all geographical areas, types of institutions, and acquisition budgets, which will give us a good overall picture of the total ebook experience. The respondent profile of the present survey is congruent with that of the 2010 survey, facilitating comparisons and the identification of trends.

Questions pertaining directly to ebook purchasing habits and vendor preferences (Questions 32 through 41) were answered by respondents who said they are involved in the recommendation/purchasing process of ebooks at their library.

2. EBOOK COLLECTIONS

Offer Ebooks

In last year's survey, we found that 94% of academic libraries surveyed did in fact carry e-books, and in our 2011 survey we found that number ticked up one percentage point. Ebooks have almost achieved a saturation level in academic libraries.

Figure 8. Q7: Do you offer ebooks? —All academic libraries
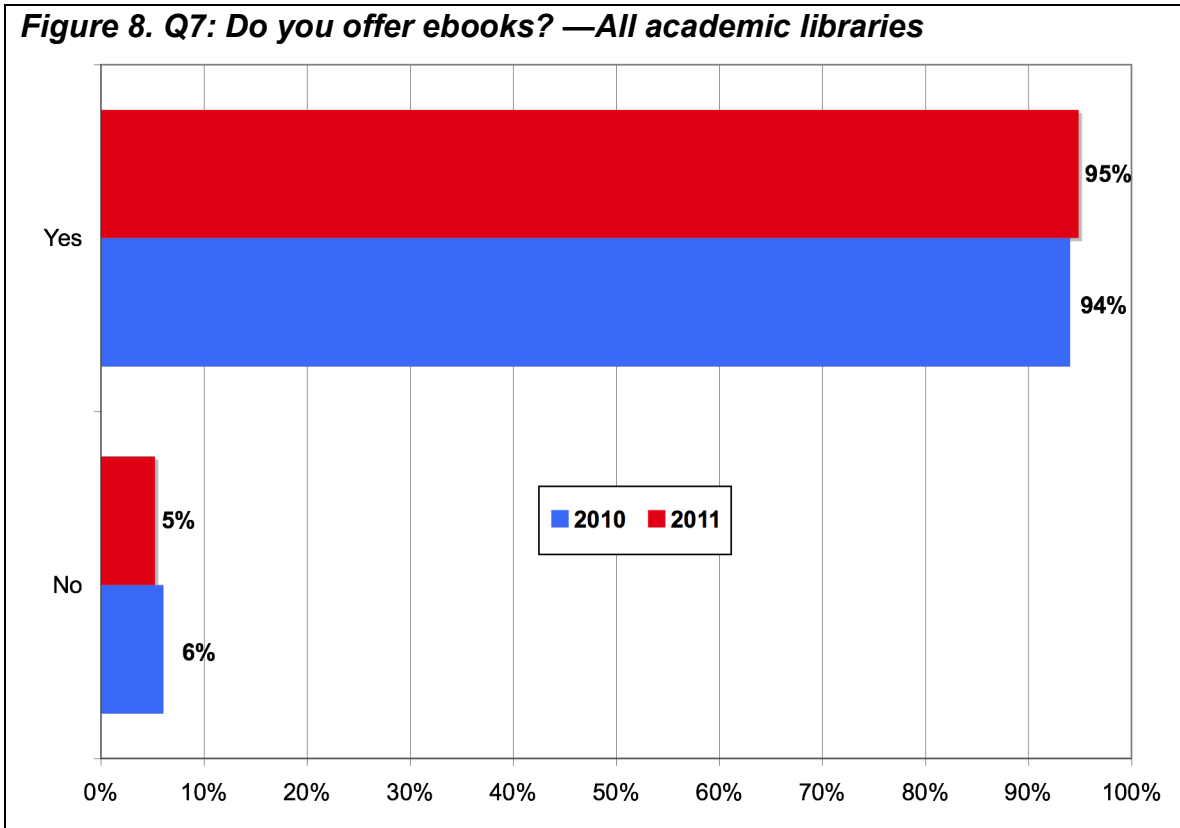
Table 7. Q7: Do you offer ebooks? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
No	5%	4%	9%	5%	5%	11%	4%	1%
Yes	95%	96%	91%	95%	95%	89%	96%	99%
2010								
No	3%	7%	8%	3%	10%	16%	2%	0%
Yes	97%	93%	92%	97%	90%	84%	98%	100%

Of those few academic libraries that do *not* currently offer ebooks (5% of all academic libraries surveyed), the majority of them (54%) say they *may* purchase ebooks in the next two years, but it is not a priority, while 26% say they *definitely* will be adding ebooks to their collections in the next two years. Only 7% insist that they will not carry ebooks.

Figure 9. Q44: What are your library's plans for ebook purchases in the next two years? —All academic libraries
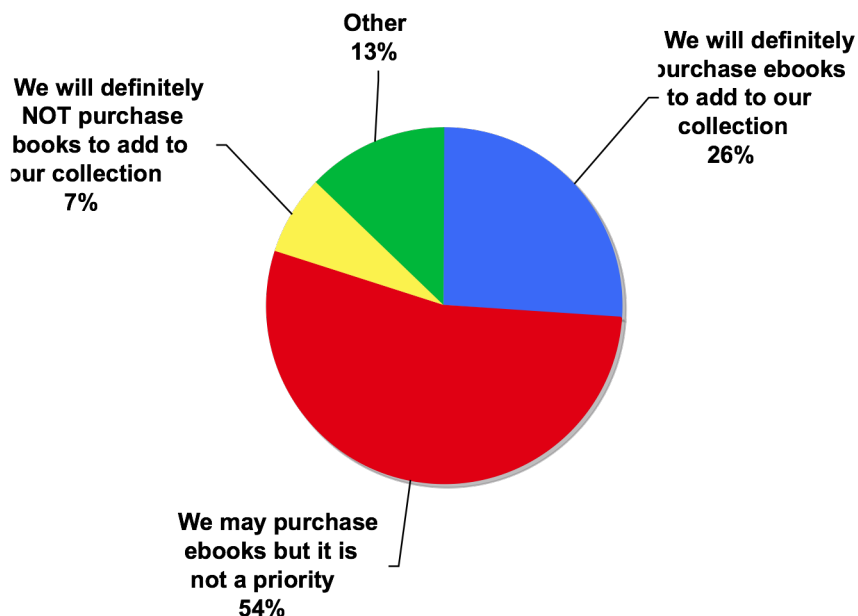
(We asked this question in a different way this year, precluding direct comparisons to last year's data. What we had found last year was that about 48% of 2010 survey respondents planned to add ebooks in the next 12 to 24 months, while about the same amount—47%—had no plans to add ebooks.)

Given that the base for this question was very small, the data were too thin to break down by type of institution or acquisitions budget.

As for why academic libraries don't or won't carry ebooks, the top reason was "lack of ereading devices," cited by 50% of respondents. "Waiting to see what the best platform will be," "no demand for them from users," and "no money for ebooks" were all cited by about the same percentage of respondents (33% to 35%).

Figure 10. Q43: Why doesn't your library offer ebooks? —All academic libraries (multiple responses permitted)

Reason	Percentage
Lack of ereading devices	50%
Waiting to see what the best platform will be	35%
No demand for them from users	33%
No money for ebooks	33%
Lack of technical support	30%
Don't understand logistics of ebooks	17%
Other	25%
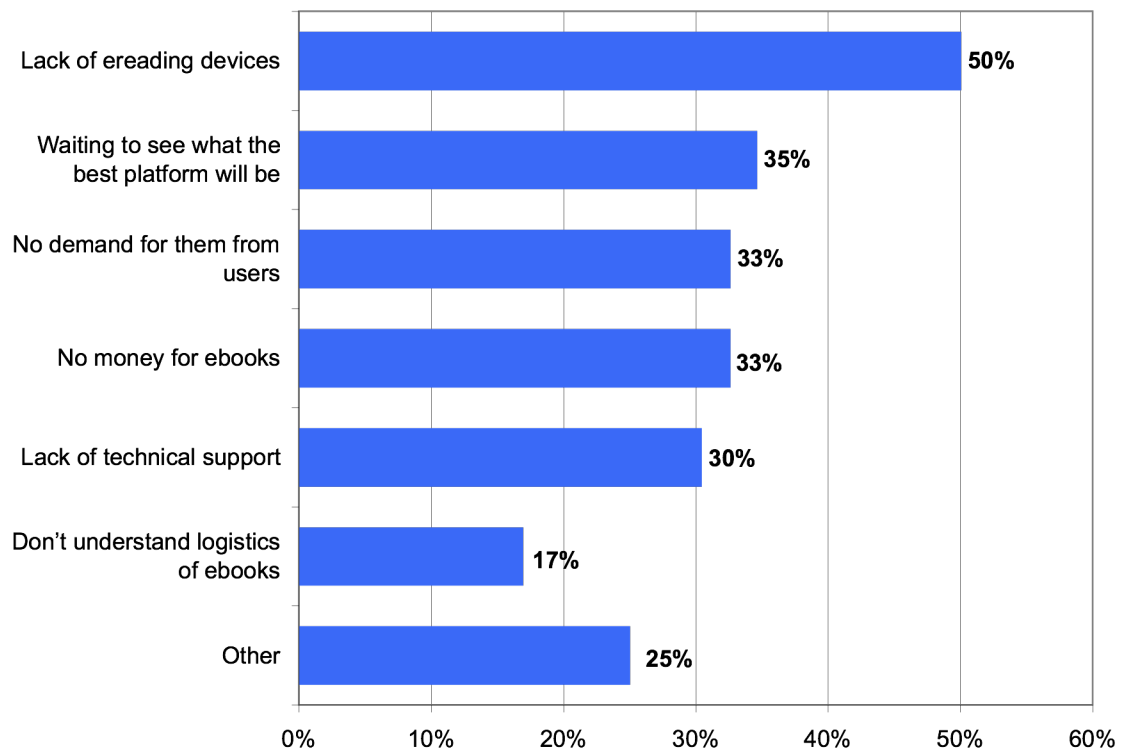
Again, the response base was a bit too thin to cross-tabulate by institution or acquisitions budget. (We also did not ask this question in last year's survey.)

Number of Ebooks Carried

In our 2010 survey of academic libraries, we found that libraries carried more than 33,500 ebooks on average (mean 33,830; median 16,666). A year later, that number has grown substantially to more than 65,000 (mean 65,208; median 17,500).

Figure 11. Q7: How many ebooks does your library currently subscribe to or own? —All academic libraries
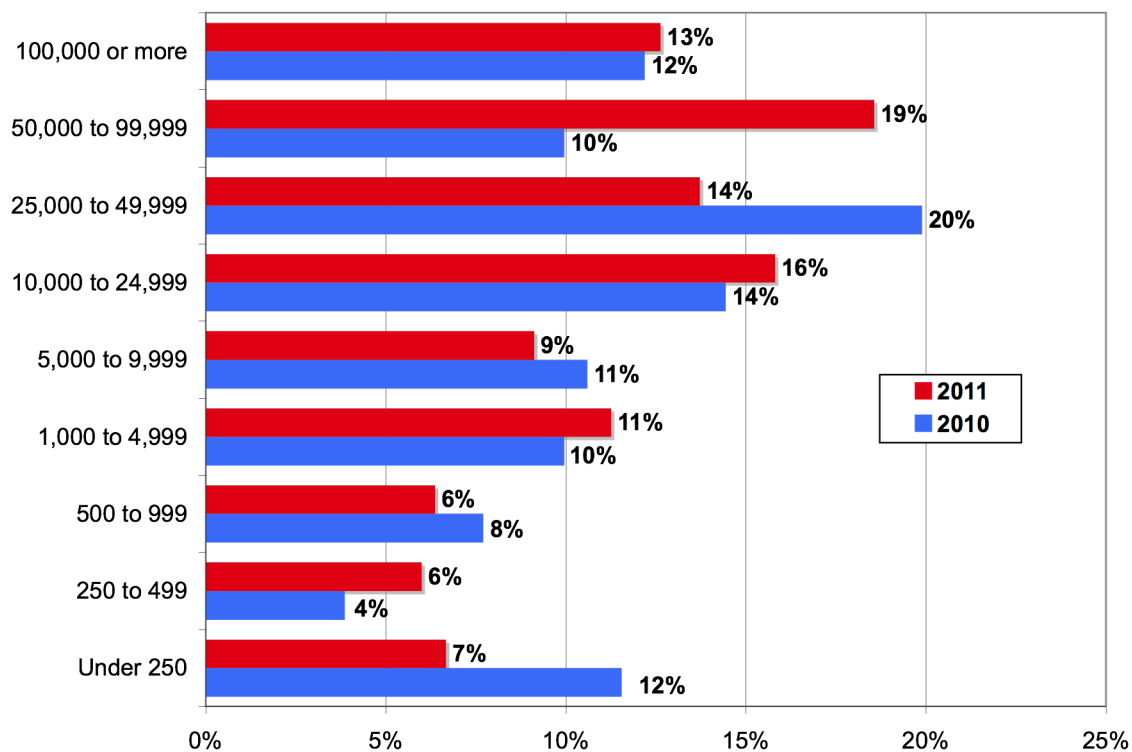
Graduate and professional institutions are likely to have more ebooks than undergraduate or community colleges, and saw the biggest increase in titles offered from 2010 to 2011. Not surprisingly, institutions with the largest acquisitions budgets also saw the biggest increase in the number of ebook titles offered (from 48,000 last year to 129,000 this year). Also, it bears mentioning that there are more titles available this year than last year, which also helps increase these numbers.

***Table 8. Q7: How many ebooks does your library currently subscribe to or own? —Academic libraries by type of institution and acquisition budget***

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Under 250	9%	6%	4%	5%	8%	6%	8%	2%
250 to 499	6%	4%	9%	7%	4%	9%	4%	4%
500 to 999	6%	5%	8%	7%	6%	5%	7%	6%
1,000 to 4,999	11%	11%	12%	12%	9%	15%	10%	10%
5,000 to 9,999	10%	8%	12%	8%	10%	9%	8%	10%
10,000 to 24,999	10%	17%	22%	17%	16%	19%	16%	15%
25,000 to 49,999	7%	16%	18%	13%	16%	20%	17%	9%
50,000 to 99,999	17%	23%	13%	19%	19%	13%	26%	15%
100,000 or more	23%	10%	2%	12%	11%	4%	4%	28%
Mean	97,507	60,593	25,214	64,833	57,183	27,925	38,032	129,352
Median	17,500	17,500	17,500	17,500	17,500	17,500	17,500	37,500
2010								
Under 250	11%	13%	14%	11%	12%	21%	7%	10%
250 to 499	5%	3%	2%	4%	4%	2%	6%	3%
500 to 999	8%	6%	10%	6%	11%	11%	5%	8%
1,000 to 4,999	10%	13%	7%	12%	7%	8%	6%	14%
5,000 to 9,999	10%	15%	8%	11%	10%	7%	14%	9%
10,000 to 24,999	14%	10%	25%	15%	12%	21%	13%	10%
25,000 to 49,999	16%	20%	27%	20%	20%	21%	29%	10%
50,000 to 99,999	11%	11%	5%	9%	11%	7%	14%	9%
100,000 or more	16%	10%	2%	12%	13%	1%	5%	28%
Mean	37,480	30,964	21,489	32,975	35,145	19,302	31,253	47,865
Median	17,124	9,999	15,499	16,160	17,499	10,416	22,320	20,226

Increased Demand for Ebooks

One question we added to our 2011 survey asked if academic libraries have been experiencing an increased demand for ebooks. More than one-half (58%) of respondents said they *had* seen an increased demand for ebooks—13% of which reported that it was a "dramatic" increase. Three out of 10 (31%) said the request level was unchanged, while 11% said they get no requests at all for ebooks.

Figure 12. Q8: Has your library experienced an increase in requests for ebooks since this time last year? —All academic libraries
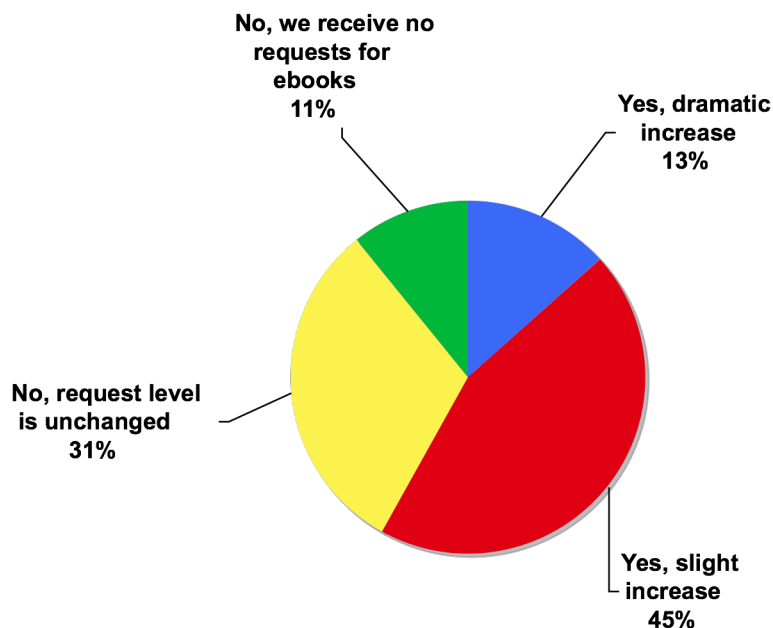
Graduate and professional institutions are the most likely to have seen a dramatic increase in demand for ebooks (20%) while community colleges are most likely to have experienced no requests for ebooks (16%).

Table 9. Q8: Has your library experienced an increase in requests for ebooks since this time last year? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Yes, dramatic increase	20%	9%	12%	16%	10%	7%	10%	24%
Yes, slight increase	43%	49%	38%	45%	42%	34%	48%	48%
No, request level is unchanged	28%	32%	33%	30%	35%	41%	30%	26%
No, we receive no requests for ebooks	8%	10%	16%	9%	13%	17%	13%	2%

Ebook Formats and Devices

One of the biggest barriers to ebook adoption among the students and faculty has been the confusion surrounding formats and devices. Competing formats and devices are often incompatible with each other, although the field is being winnowed down a bit so there are fewer "true" competing devices. Still, academic libraries face situations where many of the titles they need to carry cannot be downloaded to conventional ereaders and need to be read on computer screens—which prompts some users to resort to the print editions of those titles.

Ebook Formats

As the chart below shows, basic PDF remains the top preferred format, chosen by 54% of academic libraries, up one percentage point from last year.[1] A distant second is full-text HTML, selected by 28% of respondents, down from 32%. Ebook formats for specific ebook reading devices and for specific mobile devices are up from last year (from 13% to 23%, and 14% to 22%, respectively).

Academic journals, articles, and studies are increasingly available online as PDFs or as straight HTML which appears to be what these libraries are considering as "ebooks." This is not incorrect, but should be considered somewhat distinct from what publishers and others consider "ebooks." We also note that 33% of respondents selected "don't know," down from 40% last year.

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[1] In many cases, it is possible to simply download a PDF and copy it to an iPad, which is a very simple process. On the Mac platform at least, HTML can be "printed" to PDF and then copied to an iPad, which makes portable offline ereading of course material that much easier.

Figure 13. Q19: In which format do users prefer ebooks? —All academic libraries (multiple responses permitted)
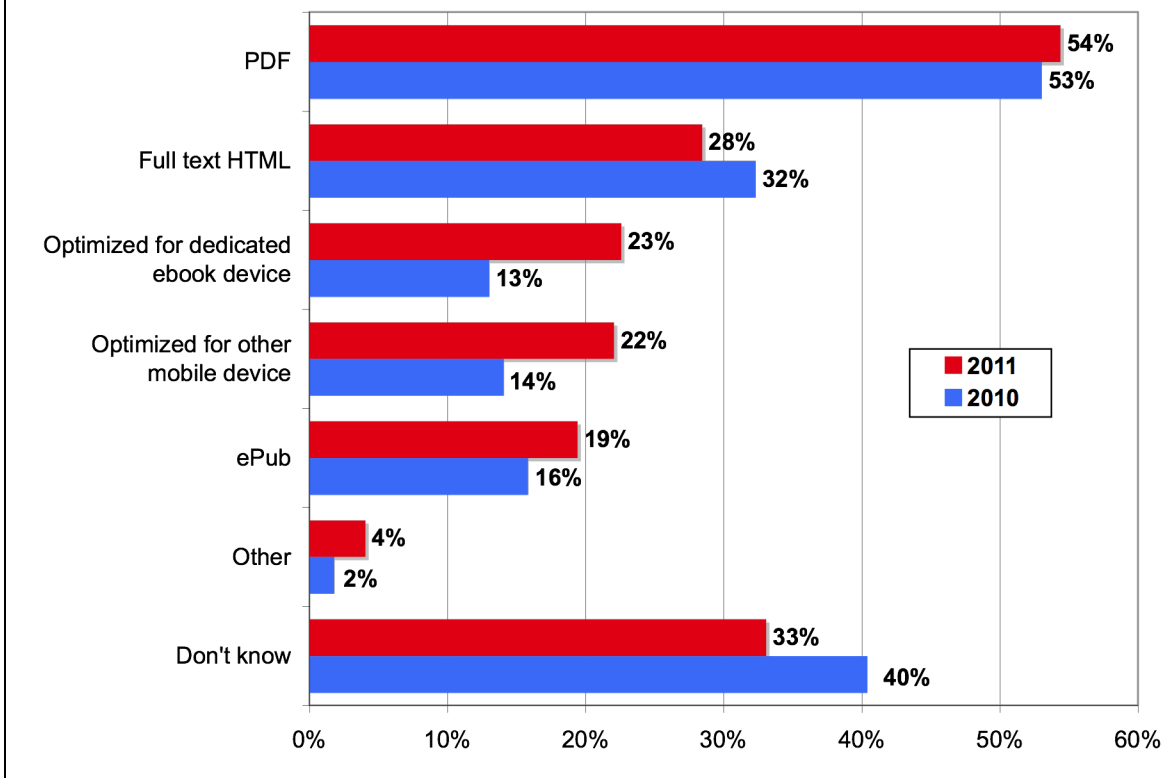
Graduate and professional institutions are more likely than others to say their users prefer their ebooks in PDF (68%) or optimized for a dedicated ebook device (34%) or mobile device (34%).

Table 10. Q19: In which format do users generally prefer ebooks? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
PDF	68%	49%	46%	54%	55%	50%	49%	64%
Full text HTML	32%	24%	32%	28%	27%	26%	29%	28%
Optimized for dedicated ebook device	34%	16%	20%	22%	19%	18%	21%	25%
Optimized for other mobile device	34%	15%	19%	21%	21%	19%	17%	29%
ePub	25%	18%	14%	20%	17%	16%	15%	27%
Other	1%	7%	4%	3%	6%	6%	6%	1%
Don't know	22%	40%	35%	33%	35%	34%	38%	27%
2010								
PDF	64%	46%	46%	53%	52%	50%	49%	58%
Full text HTML	33%	29%	32%	32%	34%	38%	27%	34%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
ePub	20%	12%	11%	16%	16%	9%	16%	21%
Optimized for other mobile device	19%	11%	9%	15%	13%	1%	16%	23%
Optimized for dedicated ebook device	15%	13%	7%	12%	13%	4%	16%	18%
Don't know	32%	47%	48%	40%	41%	41%	43%	37%
Other	1%	3%	2%	1%	3%	1%	4%	0%

Ebook Reading Devices

We also asked about the hardware devices on which library users read ebooks.

As the chart below shows, the personal laptop computer or netbook was the top hardware device on which library users read ebooks, cited by 72% of respondents, although this is down from 84% last year. A library computer was selected by 62%, down from 70%.

As we noted elsewhere, many academic titles can only be read on a proper computer and cannot be downloaded to a dedicated ereader. A dedicated ebook reader was cited by 16% of respondents, up from 12%, while "other portable device" (for instance a smartphone or tablet computer like an iPad) dropped from 22% to 17%.

The number of respondents that don't know which hardware is preferred rose from 9% last year to 16% in 2011. Possibly this is due to increased distance learning students; librarians would have little idea how remote users are reading library ematerials.

Figure 14. Q20: What device(s) do your library users most often use to read ebooks? —All academic libraries (multiple responses permitted)
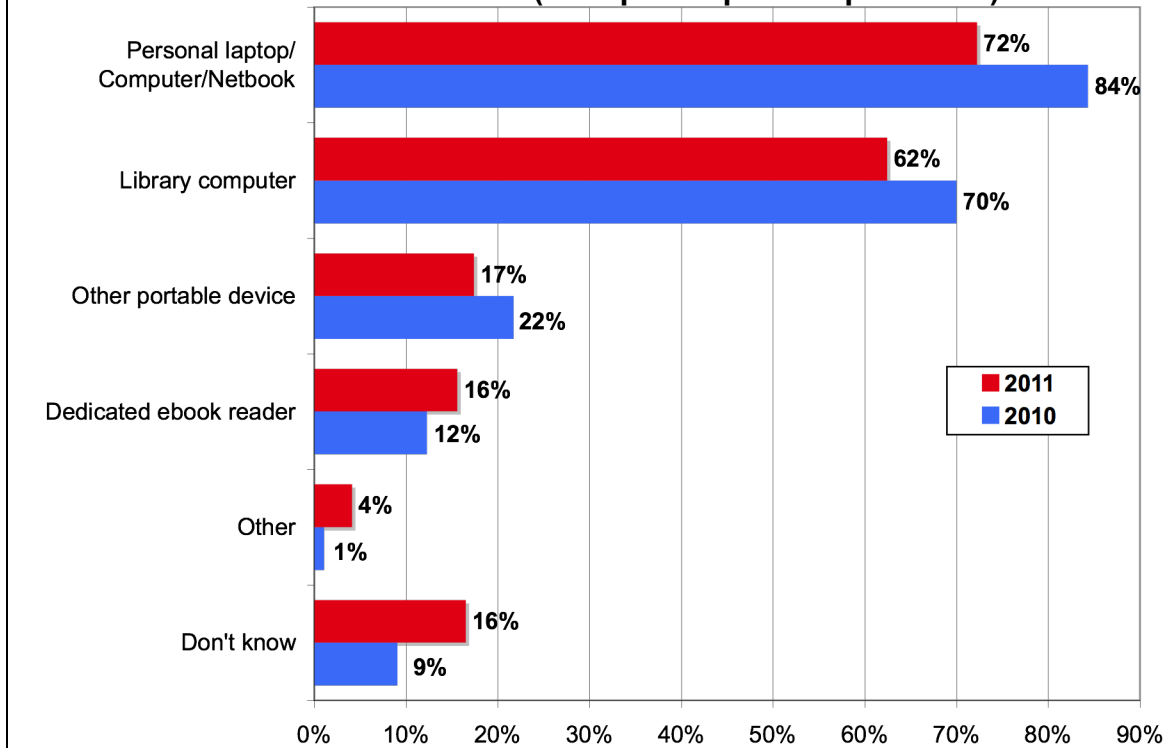
Community college users are more likely to use the library's computer and less likely to utilize a portable device or dedicated ebook reader.

Table 11. Q20: What device(s) do your library users most often use to read ebooks? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Personal laptop/ Computer/ Netbook	73%	71%	73%	74%	69%	76%	70%	74%
Library computer	49%	64%	76%	66%	58%	72%	61%	60%
Other portable device	24%	14%	15%	17%	16%	14%	11%	25%
Dedicated ebook reader	18%	16%	12%	17%	12%	14%	16%	13%
Other	4%	4%	4%	2%	7%	3%	6%	2%
Don't know	22%	17%	8%	15%	18%	11%	19%	16%
2010								
Personal laptop/ Computer/ Netbook	84%	84%	84%	87%	80%	75%	83%	92%
Library computer	61%	68%	89%	75%	64%	78%	71%	63%
Other portable device	25%	21%	11%	25%	17%	8%	20%	35%
Dedicated ebook reader	14%	15%	2%	14%	10%	5%	14%	15%
Other	1%	0%	2%	1%	0%	1%	1%	0%
Don't know	14%	10%	0%	5%	14%	9%	12%	7%

Onsite vs. Offsite Ebook Downloads

Where do library users download ebooks? One-half of academic libraries said they allow users to download ebooks on the library's Internet computers, although only 3% have a dedicated ebook download station. Forty-seven percent of academic libraries require that ebook downloads be made offsite.

Figure 15. Q21: Are users able to download ebooks to their own devices inside your library? —All academic libraries

Yes, we have a dedicated download station 3%

No, downloads must be made offsite 47%

Yes, on our internet computers 50%
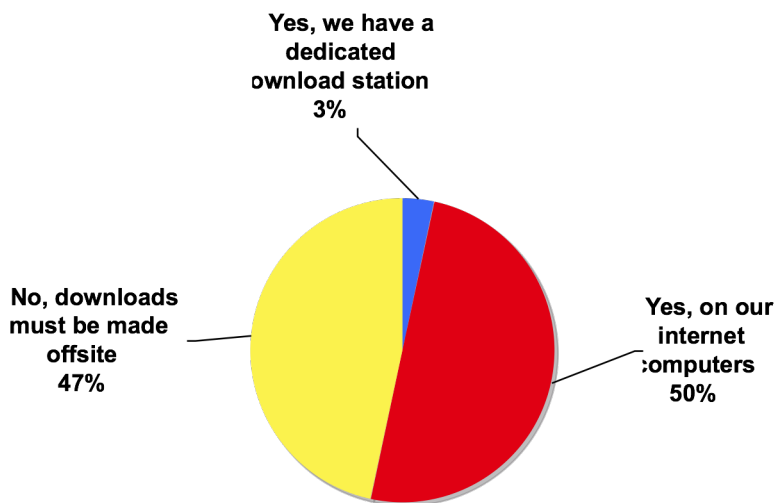
Table 12. Q21: Are users able to download ebooks to their own devices inside your library? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Yes, we have a dedicated download station	4%	1%	6%	3%	3%	5%	3%	2%
Yes, on our internet computers	57%	56%	34%	49%	52%	41%	47%	62%
No, downloads must be made offsite	40%	43%	63%	49%	45%	58%	50%	36%

Student Training

Another question we added to our 2011 survey asked if academic libraries offered student training sessions on downloading content to ereaders. And the short answer is "no," selected by 94% of libraries. Six percent of academic libraries said that they do offer ebook downloading training sessions.

Figure 16. Q22: Has your library offered student training sessions on how to download content to ereading devices? —All academic libraries
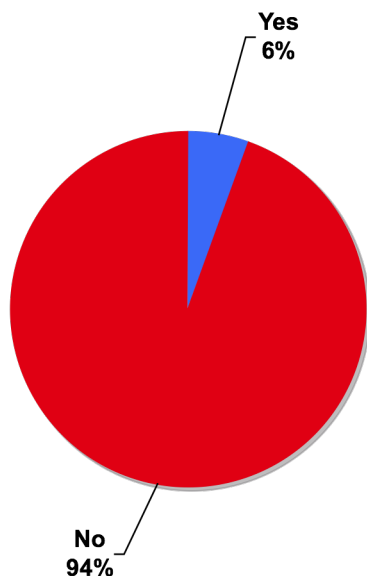
Table 13. Q22: Has your library offered student training sessions on how to download content to ereading devices? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Yes	6%	6%	5%	6%	5%	5%	5%	6%
No	94%	94%	95%	94%	95%	95%	95%	94%

Ebook Categories and Disciplines

Today, ebooks are available in just about every category in which printed books are available. For academic libraries, we asked about general subject categories and specific disciplines.

In terms of general categories, academic libraries are apt to offer general non-circulating reference materials and scholarly monographs (90% and 83%, respectively) as ebooks. The former are up six percentage points from last year, while the latter are down six points. Last year, academic libraries were less likely to offer general trade fiction and nonfiction books in ebook format, and this year they are even less likely. In our 2011 survey, we added the categories "classic literature" and "textbooks", and they were selected by 43% and 28% of respondents, respectively. Two percent of academic libraries said they *only* carry non-circulating reference materials as ebooks.

Figure 17. Q9: Which categories of ebooks does your library currently offer users? —All academic libraries (multiple responses permitted)
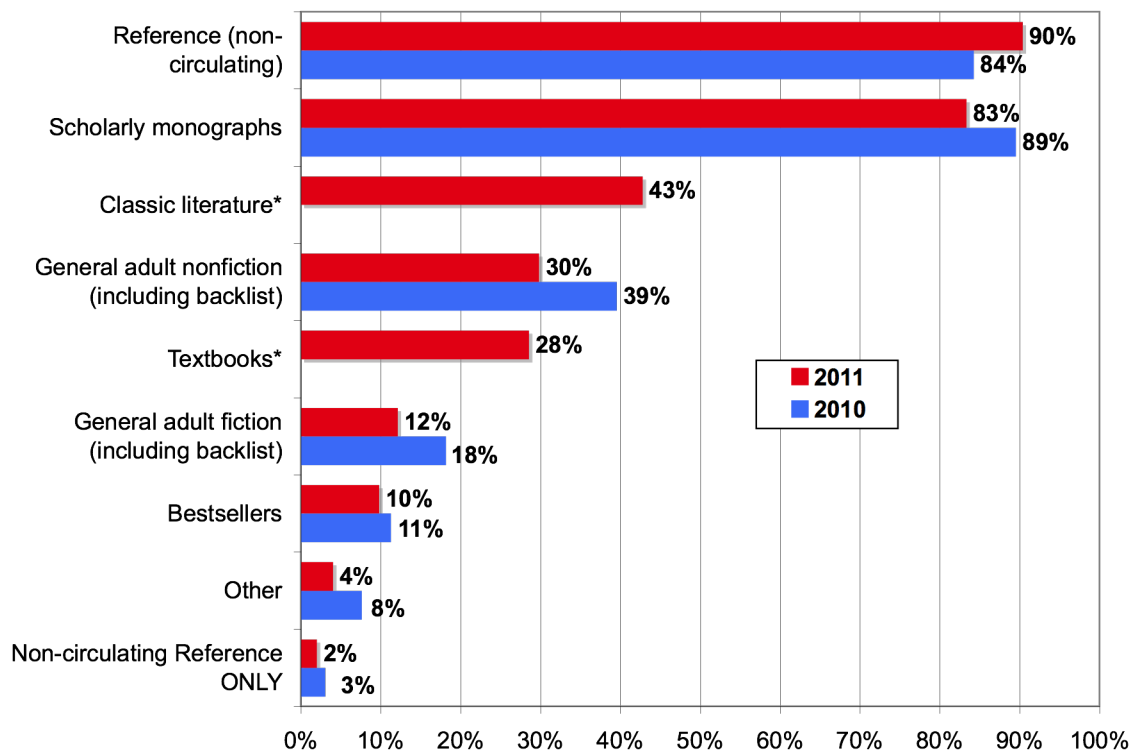
Added in 2011 survey.

Graduate and professional institutions are more likely than others to offer scholarly monographs (90%) and textbooks (40%) as ebooks, while community colleges are more likely to offer classic literature (58%) and general adult nonfiction (47%) as ebooks.

***Table 14. Q9: Which categories of ebooks does your library currently offer users? —Academic libraries by type of institution and acquisition budget* (multiple responses permitted)**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Reference (non-circulating)	93%	89%	88%	89%	91%	86%	89%	96%
Scholarly monographs	90%	85%	69%	83%	82%	67%	85%	93%
Classic literature	41%	37%	58%	49%	33%	49%	40%	43%
General adult nonfiction (including backlist)	23%	26%	47%	35%	21%	35%	34%	20%
Textbooks	40%	26%	16%	26%	30%	27%	28%	25%
General adult fiction (including backlist)	13%	11%	13%	15%	7%	11%	12%	12%
Bestsellers	8%	10%	11%	11%	6%	11%	9%	10%
Other	5%	4%	3%	3%	5%	5%	3%	5%
Non-circulating Reference ONLY	0%	2%	4%	2%	2%	5%	2%	1%
2010								
Scholarly monographs	96%	89%	78%	89%	90%	72%	94%	98%
Reference (non-circulating)	85%	82%	83%	84%	85%	76%	85%	90%
General adult nonfiction	36%	35%	53%	43%	34%	48%	39%	35%
General adult fiction	20%	14%	14%	19%	18%	13%	22%	19%
Bestsellers	13%	8%	7%	13%	9%	6%	10%	17%
Other	6%	5%	12%	7%	9%	11%	6%	6%
Non-circulating Reference ONLY	2%	4%	3%	4%	2%	7%	2%	1%

Disciplines

Looking at which specific disciplines are offered as ebooks, most disciplines are fairly evenly represented, with slight drops from 2010 to 2011. "Technology" is on top at 79% (down one percentage point), followed by "science" at 78% (down four percentage points from last year). We added the discipline "business" in the 2011 survey, and it came in at 75%. "Other" dropped from 50% to 5%, suggesting that last year most of those "other" responses were in fact business titles.

**Figure 18. Q10: For which disciplines are you most likely to offer ebooks?
—All academic libraries** (multiple responses permitted)
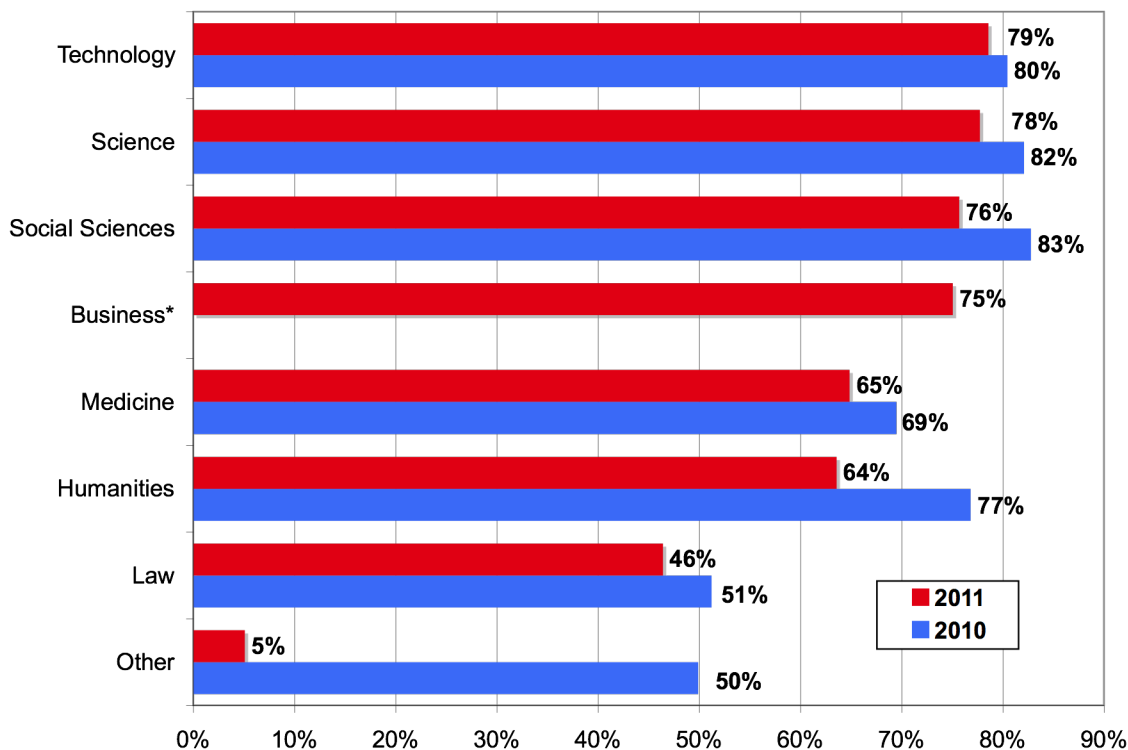
Added in 2011 survey.

Among graduate/professional institutions, ebook collections concentrate in the discipline of the specific type of institution (medical school, law school, etc.). Community colleges have all disciplines fairly evenly represented. Business ebooks spike in undergraduate institutions and community colleges. Law and medicine ebooks spike in community colleges.

Table 15. Q10: For which disciplines are you most likely to offer ebooks? — Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K–$999K	$1 Mil+
2011								
Technology	66%	82%	90%	86%	70%	76%	78%	84%
Science	73%	81%	78%	83%	70%	71%	76%	85%
Social Sciences	65%	78%	86%	81%	69%	79%	79%	71%
Business	59%	80%	89%	79%	70%	77%	80%	70%
Medicine	63%	56%	86%	67%	60%	68%	64%	59%
Humanities	50%	67%	76%	67%	59%	65%	72%	51%
Law	37%	43%	67%	51%	39%	50%	50%	37%
Other	8%	4%	4%	3%	7%	7%	4%	4%
2010								

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Social Sciences	76%	89%	89%	82%	83%	85%	91%	73%
Science	78%	82%	89%	89%	73%	76%	84%	84%
Technology	76%	79%	91%	89%	69%	76%	81%	84%
Humanities	67%	84%	91%	80%	73%	76%	86%	68%
Medicine	66%	63%	88%	71%	67%	73%	72%	64%
Law	44%	53%	67%	53%	48%	54%	52%	47%
Other	41%	55%	61%	53%	45%	50%	53%	45%

Discipline Growth

Which disciplines are likely to see the biggest ebook growth among academic libraries in the next two to three years? Science and technology ebook titles lead the pack at 61% (down from 66%) and 59% (down from 62%), respectively. Law ebooks lag the rest of the pack at 24% (down from 35%). We added business ebooks to the 2011 survey, and it checked in at 54% of all respondents.

It is logical that growth in certain disciplines will slow down, as libraries have already accumulated many of the backlist or "evergreen" titles.

Figure 19. Q11: In which discipline(s) do you project the greatest growth in ebook usage in the next 2 to 3 years? —All academic libraries (multiple responses permitted)
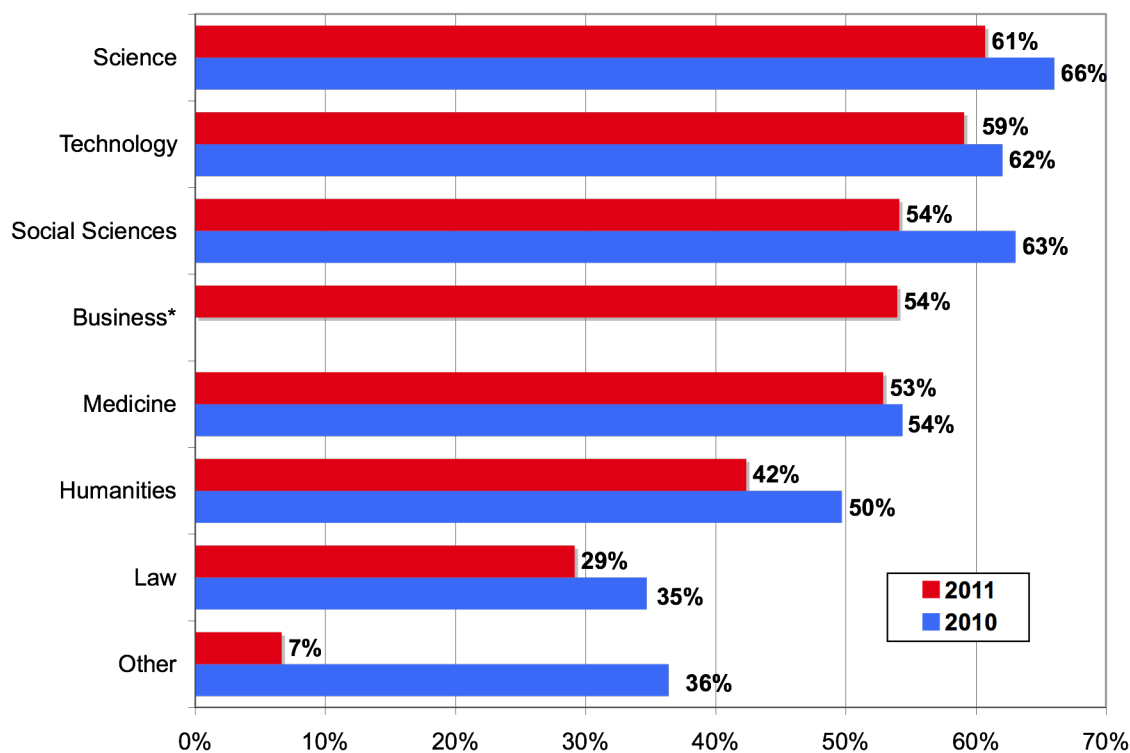
*Added in 2011 survey.

While science is the top growth discipline for both graduate and undergraduate libraries, medicine is the up-and-coming growth discipline projected for community colleges.

Table 16. Q11: In which discipline(s) do you project the greatest growth in ebook usage in the next 2 to 3 years? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Science	63%	63%	54%	66%	51%	50%	59%	69%
Technology	58%	60%	59%	65%	52%	49%	58%	69%
Social Sciences	58%	50%	57%	57%	48%	50%	54%	55%
Business	55%	57%	46%	53%	54%	39%	56%	63%
Medicine	53%	46%	66%	53%	49%	52%	53%	51%
Humanities	46%	41%	40%	40%	44%	37%	45%	40%
Law	33%	28%	27%	30%	26%	20%	30%	33%
Other	8%	6%	5%	6%	7%	7%	6%	6%
2010								
Science	68%	66%	58%	70%	59%	50%	70%	75%
Social Sciences	63%	59%	63%	65%	61%	60%	65%	62%
Technology	63%	60%	63%	66%	55%	58%	58%	69%
Medicine	56%	47%	67%	56%	52%	51%	55%	53%
Humanities	49%	49%	51%	51%	48%	44%	54%	49%
Law	32%	35%	37%	37%	32%	25%	37%	37%
Other	33%	38%	40%	40%	32%	30%	37%	37%

Ebook Marketing

How do academic libraries market their ebooks to users, or tell them which titles are available in ebook format? The top method (85%) is via the library's general online/open public access catalog (OPAC). Two-thirds (67%) have a digital collection on the library's website, while 50% rely on word of mouth.

***Figure 20. Q12: How does your library market the availability of ebooks in your library? —All academic libraries** (multiple responses permitted)*
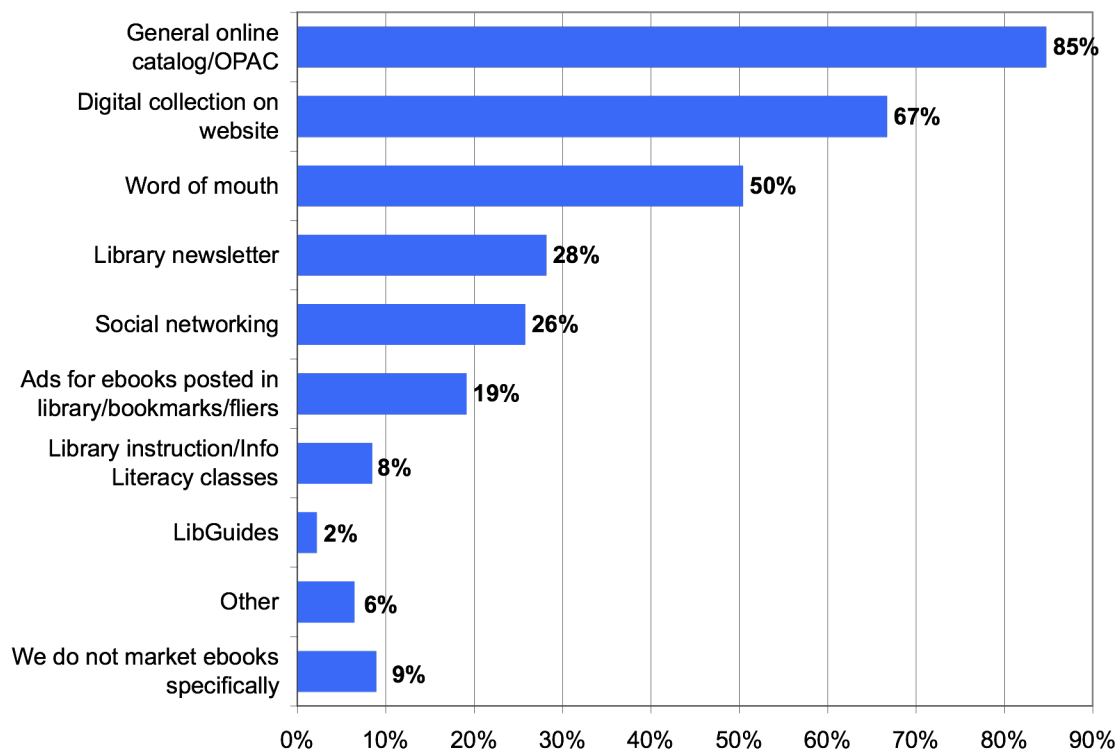
Graduate/professional academic libraries are more likely to market ebooks using social networking.

Table 17. Q12: How does your library market the availability of ebooks in your library? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
General online catalog/OPAC	87%	84%	82%	85%	83%	79%	85%	88%
Digital collection on website	73%	62%	68%	67%	66%	65%	68%	65%
Ads for ebooks posted in library/bookmarks/fliers	21%	15%	25%	19%	19%	22%	21%	13%
Library newsletter	32%	27%	25%	31%	24%	20%	30%	32%
Social networking	36%	23%	17%	24%	25%	17%	27%	31%
Word of mouth	57%	44%	53%	50%	49%	51%	49%	50%
Library instruction/Info Literacy classes	8%	5%	17%	9%	6%	12%	10%	3%
LibGuides	0%	4%	2%	2%	2%	1%	4%	2%
Other	9%	6%	3%	6%	7%	7%	5%	6%
We do not market ebooks specifically	6%	11%	10%	8%	10%	9%	9%	9%

General Conclusions

Like other types of libraries, academic libraries are actively involved in adding ebooks as an option for users, and expanding their collections of them, although we found last year that academic libraries were already well on their way to having a fairly mature collection of ebook materials. Science and technology are currently the most highly represented and the top growth disciplines for ebooks in academic libraries overall.

Academic libraries are more likely to consider an "ebook" a PDF or HTML version of a text; such as a monograph, scholarly paper, journal article, or other material. These materials are generally unavailable in commercially popular formats such as those often used on the Amazon Kindle or Barnes & Noble Nook.

As a result, the laptop or other computer is the primary means of accessing this content for academic library users. As the verbatim comments at the end of this chapter indicate, this is of no small consternation to academic librarians. The verbatim comments at the end of Chapter 5 also indicate that ability to download a lot of scholarly and other academic ematerials to commercially available ereaders is one big wish list item for academic libraries.

As more and more institutions offer distance learning programs, remote access to library materials is necessary, thus driving the demand for electronic media. This also makes the specific means of access invisible to the library staff.

In Their Own Words...

On our questionnaire, we added an open-ended question soliciting academic libraries' thoughts and concerns about ebooks in their library, and we present a handful of these verbatim responses here, and at the ends of Chapters 3 and 4 (lightly edited).

- ebooks mark the end of civilization.

- Resistance from faculty and students is surprising, especially as I am the science librarian, subjects that would seem to support ebook use.

- The biggest selling point to users is the 24/7 availability.

- Ours are all NetLibrary, only readable on-screen. Students don't use them often as they prefer print.

- Last year was the first that I would say the majority of students did not react to seeing an e-book with "I have to read it on the computer?!"

- The Harper Collins model/issue is HORRIBLE.

- I think they will become increasingly more important.

- I really dislike that we have to have so many different interfaces for ebooks. I think it makes it much harder for students to find/access—even when they are in the OPAC.

- We have a very small collection that is hard to find on the website, and patrons rarely use.

- I hope/would like for better communication between vendors of ebooks and libraries

- The technology and competition and business models are moving so fast it is really hard to keep up with. We are really wanting to find a way to consolidate this somehow. We are not using OverDrive right now but are looking into this for the future.

- We use consortium-group deal ebooks only—none are downloadable; however ebooks will not "take off" until they are downloadable to several devices—for a limited circ period.

- We have a collection that is primarily NetLibrary books, and don't want to confuse students with too many platforms, but the one book, one user model doesn't always work well.

- I was really surprised by the drop in use of ebooks in our library this year.

- Some of the questions on this survey were difficult to answer. The questions seemed geared toward a library that uses a service like OverDrive or lends ereading devices. While we do lend Kindles and Sony Readers loaded with ebook content, for the most part, our ebook collection is largely internet resources that don't have downloadable or checkout components. Our vendors don't uses systems like Overdrive that

allow a patron to checkout and download an ebook to a device for a loan period. Instead, patrons follow URLs to vendor sites that provide them access to ebook content. Depending on the license, patrons are usually able to download only as much content as is provided by fair use.

- Humanities faculty here are very skeptical about e-books; if forced to decide between print and e-book, they want print.

- As our online/distance course offerings expand, so too will demand for ebooks.

- We need more effective ways to locate and access them.

- Libraries are poised to give corporations control over our content, which means we are abandoning our role when it comes to defending intellectual freedom, local curation, and preservation. We are also abandoning our principle that everyone deserves access to information because when the only way you can read a book is through a device, you are reducing access to those who can't afford it—now they'll have to wait in line for a library computer. I think this wholesale abandonment of our principles in pursuit of pleasing consumer-oriented patron desires and being trendy is disgraceful.

- Our patrons aren't really demanding them, not even our undergraduates. I'm kind of tired of hearing that patrons are pushing for them since I don't see it happening. I think it's being pushed by administrators to save space and possibly cost.

- I continue to be dismayed that regardless of age or technical ability, students want paper books. When looking for an article they love electronic. When looking for a book, they want to hold it and physically turn its paper pages. Go figure.

- The most common question or request for ebooks is if they can print the book. Interestingly, most shy away from checking out a book as well. For many, reading at the computer (either on campus or at home) is something patrons do not want to do. We don't have support for ereaders. Our patrons in general don't have e-readers, however if we had the option to we would integrate an e-reader feature we would.

- Since none of our ebooks currently offers downloads, difficulty of printing chapters is the biggest complaint. We would like to buy more ebooks but so far the process is still daunting.

- Students have said they might use an ebook reader if they could have access to textbooks and be able to highlight and take notes the way they do with textbooks.

- Our patron-driven ebook acquisitions beta project this semester has been an outstanding success. A graduate student wrote to me that an ebook he needed that was over our price limit was crucial for his M.S. thesis. I

ok'ed the purchase and he wrote a wonderful thank you note on how impressed he was with the library's ability to listen to the students.

- I am excited to further explore patron driven acquisition and hope to implement it next year.

- It's a challenge to separate what users want, in terms of ebooks, from what librarians THINK they want.

- Wow, you could write 100 pages about ebooks in 2011, as so much has changed. We're looking at it from an academic library perspective, so much of the things that have happened with OverDrive don't really apply, but I like the ability to (as a library user) go to the public library and get ebooks for my Nook, and I wish there would be a similar option for academic libraries. Ebrary has potential, but EBSCOhost is such a nicer interface, I hope that EBSCO makes ebooks work. Right now the hot thing is downloading ebooks, but I expect in a few years people will all have tablets and then it might be moot, still, it's nice to be able to read offline, so I think there is a future in offline downloading of ebooks.

- When we purchase print books, the pricing is never based on the number of users. Why are ebooks priced according to the number of users or downloads? Additionally, we do not circulate ebooks. How can you circulate an ebook, anyway? People read them online, they don't check them out. (They don't leave the host server!) We have usage statistics for e-books, but no "circulation" statistics, per se.

- We use ebooks from NetLibrary & Ebrary (single or multi-user access no download) so many of the questions don't seem to apply. Primarily purchasing from Ebrary now since multi-access is available (depending on title) and they have better tools. BUT NetLibrary is becoming ebooks on EBSCO later this summer and the preview looks awesome.

- The ebook industry seems to be about where ejournals were 15 years ago. I hope it doesn't take 15 years for these things to be standardized.

3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

Acquisition

The top factors that influence an academic library's decision to purchase an ebook haven't changed significantly over the past year, and remain a combination of economics and demand. "Usage statistics/projected usage" climbed to number one from number three (selected by 72% of respondents, up from 59%). The former number one, "faculty request," drops to number two (63%, down from 66%). "Inclusion in bundles with attractive pricing" drops from number two to number three (59%, down from 62%). In the 2011 survey, we added "licensing terms/lending caps," which was selected by 22% of all respondents.

***Figure 21. Q36 What factors influence your decision to purchase an ebook for your media center? —All academic libraries** (multiple responses permitted)*
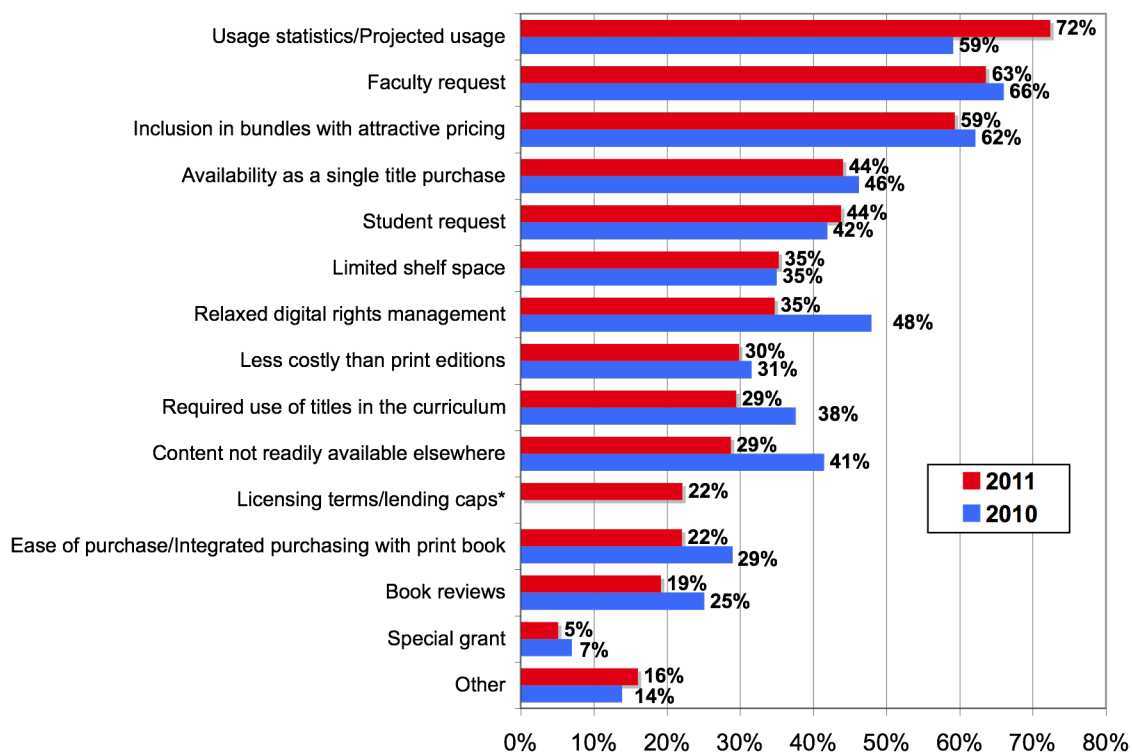
Added in 2011 survey.

Faculty requests have a greater influence among graduate/professional libraries. "Inclusion in bundles with attractive pricing" is most attractive in undergraduate institutions. Book reviews hold more weight at community colleges, indicating that they carry more mainstream ebooks.
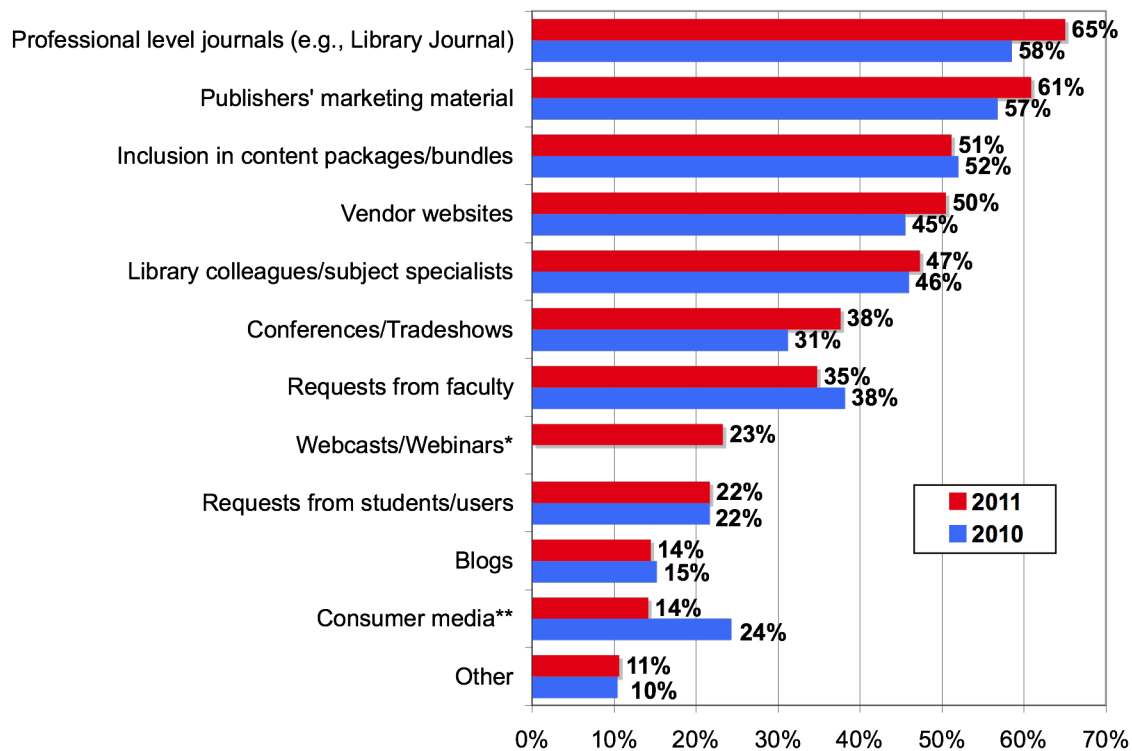
***Table 18. Q36: What factors influence your decision to purchase an ebook for your media center? — Academic libraries by type of institution and acquisition budget* (multiple responses permitted)**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
2011								
Usage statistics/ Projected usage	81%	71%	63%	71%	73%	63%	72%	77%
Faculty request	79%	65%	40%	61%	66%	40%	63%	82%
Inclusion in bundles with attractive pricing	49%	67%	59%	64%	56%	54%	63%	57%
Availability as a single title purchase	51%	50%	25%	38%	52%	32%	41%	58%
Student request	58%	43%	25%	40%	44%	21%	43%	59%
Limited shelf space	38%	36%	31%	34%	37%	31%	33%	43%
Relaxed digital rights management	43%	36%	22%	35%	31%	16%	36%	44%
Less costly than print editions	31%	28%	31%	33%	22%	26%	29%	34%
Required use of titles in the curriculum	36%	27%	25%	28%	32%	16%	32%	32%
Content not readily available elsewhere	26%	30%	29%	27%	29%	26%	33%	25%
Licensing terms/lending caps	22%	23%	21%	24%	22%	19%	20%	24%
Ease of purchase/ Integrated purchasing with print book	27%	21%	16%	21%	19%	15%	21%	26%
Book reviews	13%	20%	25%	19%	18%	18%	25%	13%
Special grant	4%	5%	7%	7%	2%	9%	3%	5%
Other	17%	16%	15%	13%	19%	16%	19%	13%
2010								
Faculty request	73%	58%	64%	70%	61%	58%	57%	81%
Inclusion in bundles with attractive pricing	63%	61%	52%	61%	64%	53%	66%	62%
Usage statistics/ Projected usage	63%	51%	64%	66%	50%	54%	49%	70%
Relaxed DRM that allows printing or downloading	50%	50%	40%	50%	45%	39%	48%	54%
Availability as a single title purchase	51%	40%	45%	45%	47%	37%	44%	53%
Student request	51%	33%	40%	45%	38%	34%	33%	56%
Content not readily available elsewhere	39%	40%	48%	37%	47%	53%	31%	42%
Required use of titles in the curriculum	42%	32%	36%	38%	37%	32%	34%	46%
Limited shelf space	32%	37%	40%	33%	38%	32%	40%	33%
Less costly than print editions	30%	32%	36%	32%	31%	39%	29%	28%
Ease of purchase/ Integrated purchasing with print book	32%	29%	21%	31%	26%	15%	29%	37%
Book reviews	27%	20%	26%	27%	22%	22%	22%	30%
Special grant	4%	4%	17%	10%	3%	5%	9%	5%
Other	13%	17%	12%	14%	14%	10%	16%	14%

Learn About Ebooks

The top method that libraries find and learn about ebooks remains "professional level journals" (65%, up from 58%), while "publishers' marketing materials" is a close second at 61% (up from 57%). "Inclusion in content packages/bundles" is number three at 51% (down a tick from 52%). Despite "faculty request" being one of the top influencing factors of ebook acquisition, when it comes to learning about new ebooks, "requests from faculty" is far down the list at 35% of academic libraries—and is down from 38% last year. In the 2011 survey, we added "Webcasts/Webinars" which checked in 23% of all respondents.

Figure 22. Q38: How do you generally find and learn about ebooks?
—All academic libraries (multiple responses permitted)

	2011	2010
Professional level journals (e.g., Library Journal)	65%	58%
Publishers' marketing material	61%	57%
Inclusion in content packages/bundles	51%	52%
Vendor websites	50%	45%
Library colleagues/subject specialists	47%	46%
Conferences/Tradeshows	38%	31%
Requests from faculty	35%	38%
Webcasts/Webinars*	23%	
Requests from students/users	22%	22%
Blogs	14%	15%
Consumer media**	14%	24%
Other	11%	10%

*Added in 2011 survey.
**Was listed in 2010 survey as "General interest news & journals."

As the responses to the previous question suggest, among graduate/professional institutions, "request from faculty" at 51%, is higher than average.
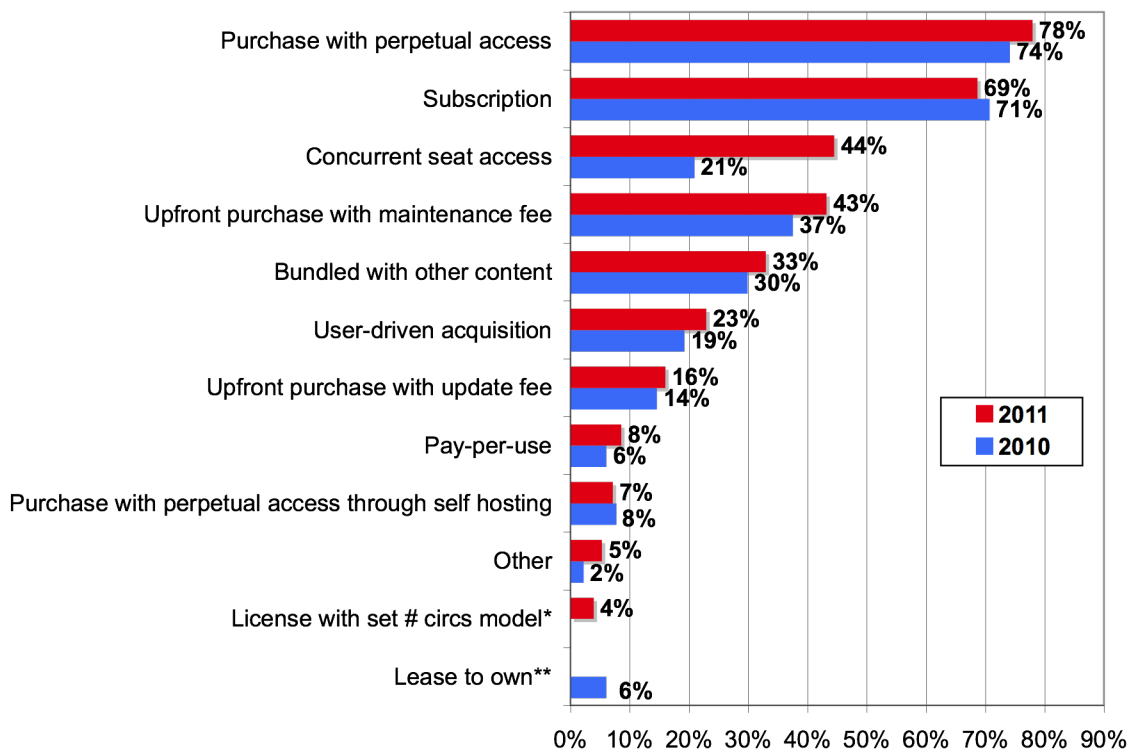
Table 19. Q38: How do you generally find and learn about ebooks? *—Academic libraries by type of institution and acquisition budget* **(multiple responses permitted)**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Professional level journals (e.g., Library Journal)	55%	66%	76%	64%	68%	82%	61%	59%
Publishers' marketing material	60%	59%	64%	64%	59%	63%	58%	61%
Inclusion in content packages/bundles	51%	50%	54%	49%	53%	49%	50%	52%
Vendor websites	58%	49%	43%	51%	47%	38%	53%	56%
Library colleagues/subject specialists	52%	47%	42%	47%	43%	45%	44%	51%
Conferences/ Tradeshows	44%	39%	27%	35%	42%	34%	39%	36%
Requests from faculty	51%	31%	21%	35%	33%	26%	30%	44%
Webcasts/Webinars	29%	23%	16%	20%	25%	22%	22%	25%
Requests from students/users	36%	18%	10%	20%	24%	12%	17%	32%
Blogs	15%	15%	12%	13%	15%	14%	16%	14%
Consumer media	15%	14%	13%	15%	14%	12%	16%	14%
Other	19%	8%	4%	7%	15%	8%	8%	16%
2010								
Professional level journals (book reviews/mentions)	55%	59%	62%	58%	60%	56%	61%	56%
Publishers' marketing material	63%	55%	52%	53%	61%	53%	52%	64%
Inclusion in content packages/bundles	57%	52%	31%	51%	54%	37%	56%	56%
Library colleagues/subject specialists	49%	47%	48%	46%	45%	41%	48%	48%
Vendor websites	52%	40%	55%	48%	42%	46%	42%	47%
Requests from faculty	46%	35%	21%	40%	36%	22%	34%	53%
Conferences/ Tradeshows	33%	36%	19%	29%	34%	19%	31%	40%
General interest news & journals (book reviews/mentions)	22%	23%	29%	25%	23%	20%	24%	28%
Requests from students/users	28%	18%	10%	25%	17%	10%	16%	36%
Blogs	16%	17%	12%	17%	13%	14%	14%	19%
Other	13%	10%	5%	11%	10%	7%	6%	17%

Ebook Purchasing Terms

When libraries purchase ebooks, more often than not (78% of all respondents, up from 74% last year) they purchase "perpetual access," while 69% (down slightly from 71%) purchase a subscription. "Concurrent seat access" has gained in popularity in the past year, climbing from 21% to 44%. Forty-three percent (up from 37%) pay an upfront cost with a maintenance fee. In the 2011 survey, we added "license with set number of circulation model," which is not particularly popular (4%).

Figure 23. Q32: What type of purchasing terms does your library typically use when acquiring ebooks? —All academic libraries (multiple responses permitted)

Added in 2011 survey.
**Appeared in 2010 survey; not included in 2011.*

Table 20. Q32: What type of purchasing terms does your library typically use when acquiring ebooks? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
2011								
Purchase with perpetual access	84%	79%	69%	77%	75%	65%	77%	91%
Subscription	71%	74%	56%	68%	68%	55%	72%	74%
Concurrent seat access	62%	40%	29%	40%	45%	27%	38%	60%
Upfront purchase with maintenance fee	44%	48%	33%	41%	48%	24%	43%	63%
Bundled with other content	37%	32%	30%	35%	26%	28%	27%	41%
User-driven acquisition	41%	17%	9%	24%	15%	8%	15%	42%
Upfront purchase with update fee	24%	17%	3%	15%	16%	0%	13%	32%
Pay-per-use	14%	8%	3%	8%	8%	3%	8%	11%
Purchase with perpetual access through self hosting	11%	6%	3%	7%	6%	6%	3%	11%
License with set # circs model	8%	2%	1%	2%	5%	1%	2%	8%
Other	8%	3%	6%	4%	7%	6%	6%	3%
2010								
Purchase with perpetual access	77%	76%	69%	75%	73%	55%	76%	83%
Subscription	74%	70%	60%	69%	73%	59%	70%	78%
Upfront purchase with maintenance fee	40%	34%	36%	38%	37%	21%	35%	52%
Bundled with other content	33%	27%	29%	34%	25%	21%	30%	35%
Concurrent seat access	31%	16%	7%	21%	20%	7%	11%	40%
User-driven acquisition	27%	21%	2%	23%	15%	5%	11%	37%
Upfront purchase with update fee	15%	15%	7%	15%	14%	2%	15%	22%
Purchase with perpetual access through self hosting	11%	5%	5%	5%	11%	7%	8%	7%
Pay-per-use	5%	6%	5%	7%	5%	3%	2%	11%
Lease to own	9%	5%	0%	7%	5%	0%	7%	10%
Other	2%	3%	2%	2%	2%	2%	2%	1%

"Fair and Realistic" Purchasing Model

On our 2011 survey, we added a question about what academic librarians feel would be a fair and realistic ebook licensing model. The overwhelming response—73% of all respondents—was "maximum access" through which multiple users are allowed simultaneous access. A "patron-driven acquisition model," through which multiple titles are available and are purchased based on holds, was selected by 49% of respondents. An "unlimited circulation" model was favored by 42% of respondents.

***Figure 24. Q37: What do you feel would be a fair and realistic model for licensing ebooks? —All academic libraries** (multiple responses permitted)*
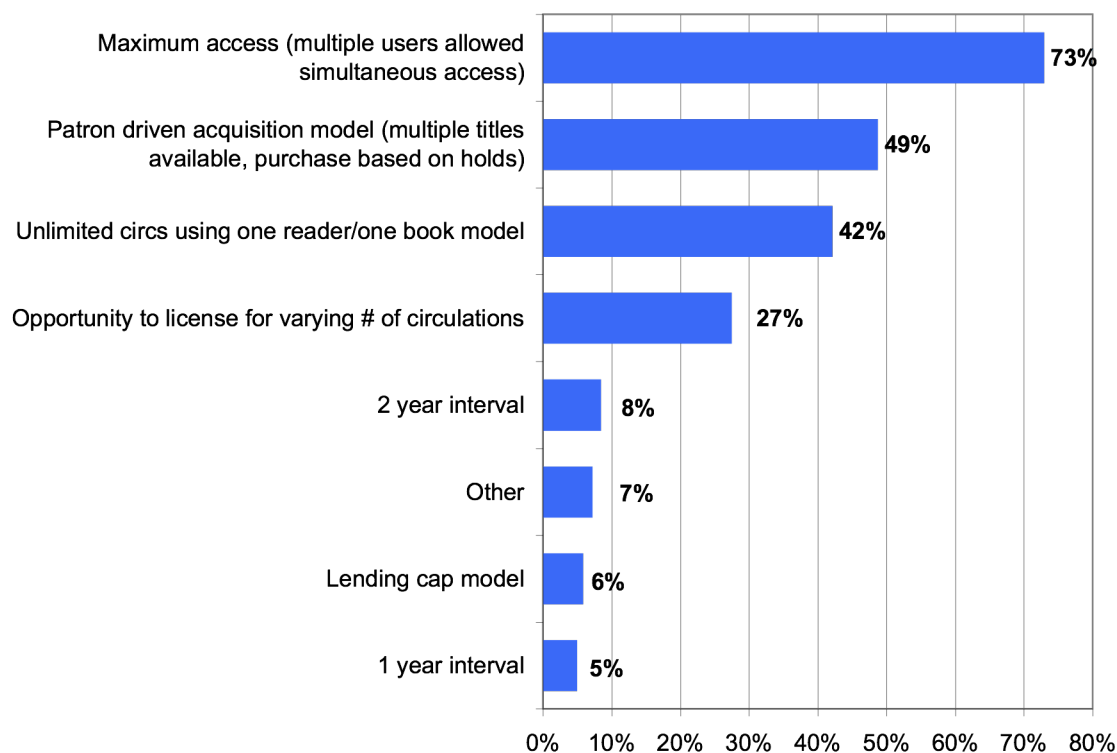
Table 21. Q37: What do you feel would be a fair and realistic model for licensing ebooks? —Academic libraries by type of institution and acquisition budget (multiple responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Maximum access (multiple users allowed simultaneous access)	79%	68%	72%	72%	71%	74%	67%	78%
Patron driven acquisition model (multiple titles available, purchase based on holds)	54%	54%	32%	43%	55%	37%	46%	62%
Unlimited circs using one reader/one book model	34%	47%	45%	42%	41%	48%	47%	33%
Opportunity to license for varying # of circulations	26%	31%	23%	22%	33%	28%	30%	26%
2 year interval	7%	8%	11%	8%	9%	6%	11%	9%
Lending cap model	4%	6%	8%	5%	7%	2%	9%	6%
1 year interval	1%	6%	8%	3%	7%	9%	4%	3%
Other	13%	4%	5%	6%	9%	3%	5%	11%

Consortium Program

Almost six out of ten (59%, down from 63% last year) of academic libraries are part of a consortium license program for ebooks, while 23% (up two percentage points from 21%) are not. Eight percent plan to join a consortium, while 4% used to belong but don't any longer.

Figure 25. Q29: Is your library part of a consortium license program for its ebook collection? —All academic libraries
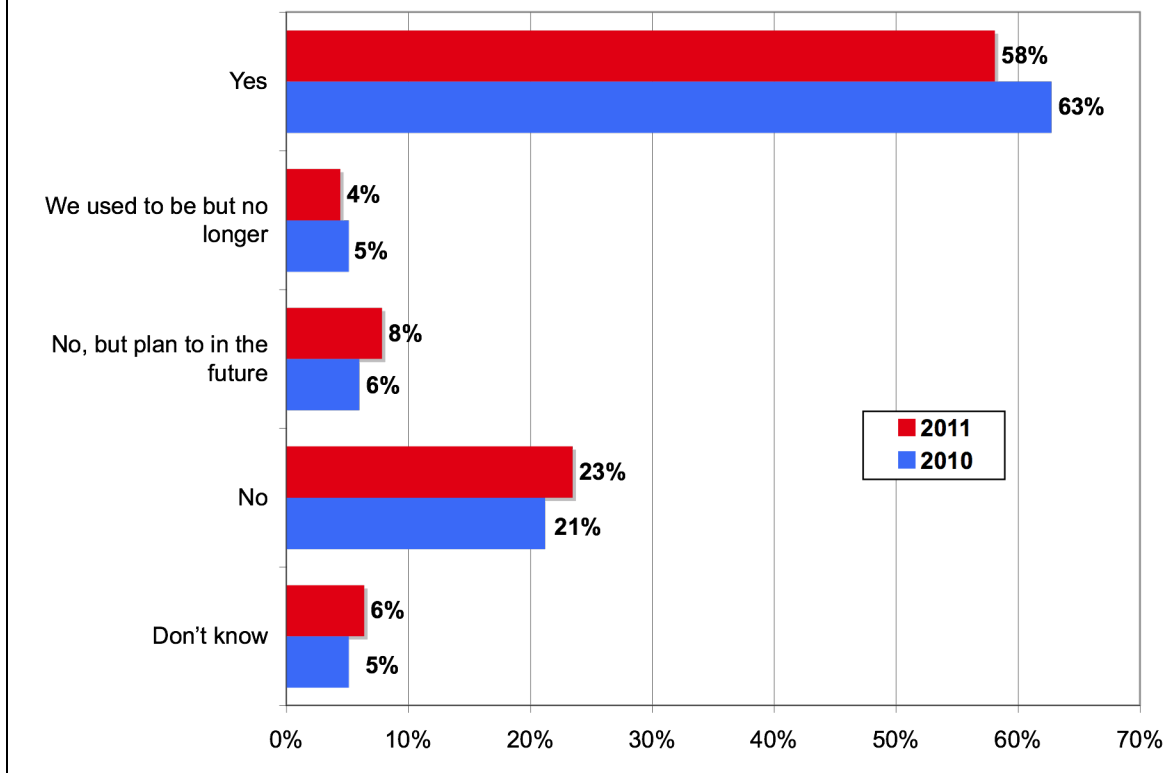

Consortium membership has decreased substantially for undergraduate 4-year institutions (53% consortium membership down from 68% in 2010). This decline appears to be happening in private institutions. Community college libraries have increased their rate of consortium membership from 62% to 73%.

Table 22. Q29: Is your library part of a consortium license program for its ebook collection? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Yes	54%	53%	73%	64%	49%	62%	60%	53%
We used to be but no longer	1%	7%	4%	5%	4%	3%	7%	3%
No, but plan to in the future	10%	7%	6%	9%	5%	5%	6%	14%
No	27%	26%	14%	17%	34%	22%	23%	25%
Don't know	9%	6%	4%	5%	8%	8%	4%	6%
2010								
Yes	56%	68%	62%	65%	60%	54%	65%	65%
We used to be, but no longer	7%	8%	2%	5%	5%	3%	7%	5%
No, but will in the future	8%	6%	2%	5%	7%	2%	8%	7%
No	21%	15%	31%	20%	23%	36%	18%	14%
Don't know	9%	4%	2%	5%	6%	5%	2%	8%

We added a follow-up question in 2011 as to whether they also purchased ebooks independently. Three-fourths (76%) of academic libraries that are part of a consortium also buy ebooks independently.

Figure 26. Q30: If yes, does your library also buy ebooks independently? — Academic libraries that are part of a consortium
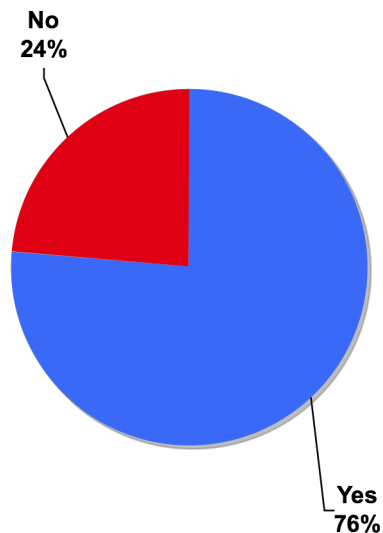
Graduate and professional institutions are the most likely (92%) to also purchase books independently as well as part of a consortium.

Table 23. Q30: If yes, does your library also buy ebooks independently? — Academic libraries that are part of a consortium, by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Yes	92%	80%	57%	75%	75%	54%	76%	96%
No	8%	20%	43%	25%	25%	46%	24%	4%

Ebook Usage License

In terms of ebook usage licensing (which is often dictated by the publisher), 65% of academic libraries say they currently license the use of only a single ebook at a time, much like a printed book model. Unlimited access or simultaneous use of ebook titles is available at 59% of libraries. In the 2011 survey, we added "multiple ebook usage, but not unlimited," which was selected by 25% of respondents. Comparisons to 2010 data are unreliable due to the added choices in 2011.

Figure 27. Q13: What ebook usage license model is currently employed at your library? —All academic libraries (multiple responses permitted)
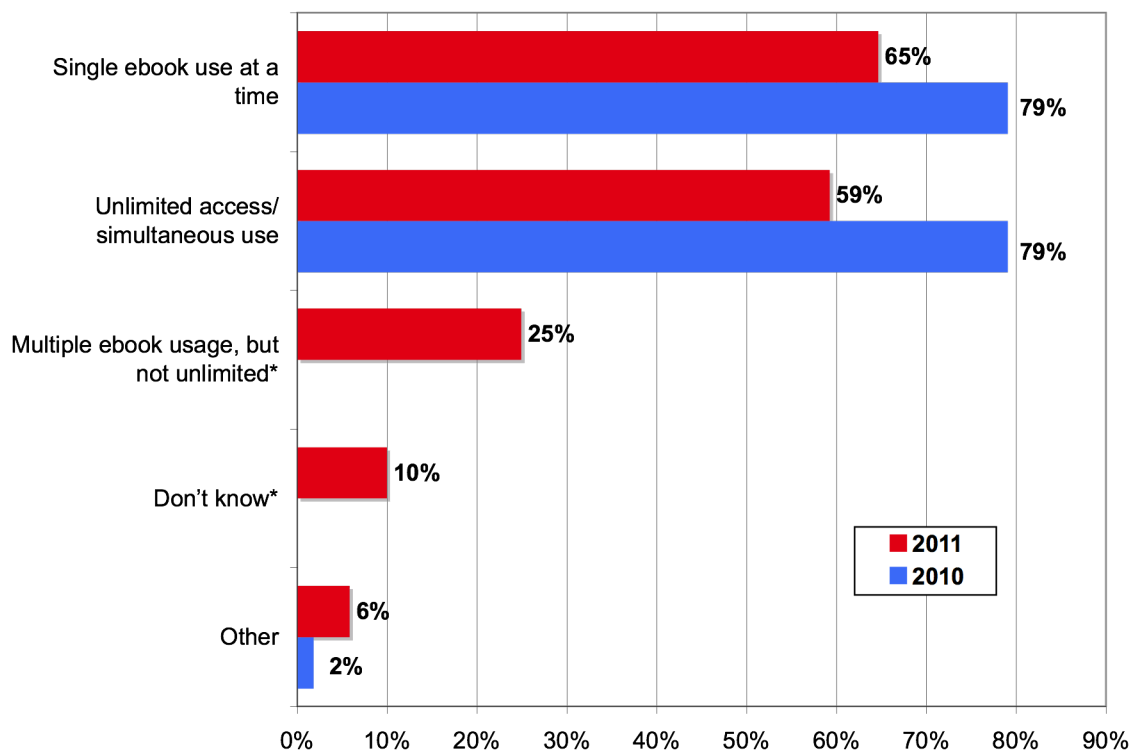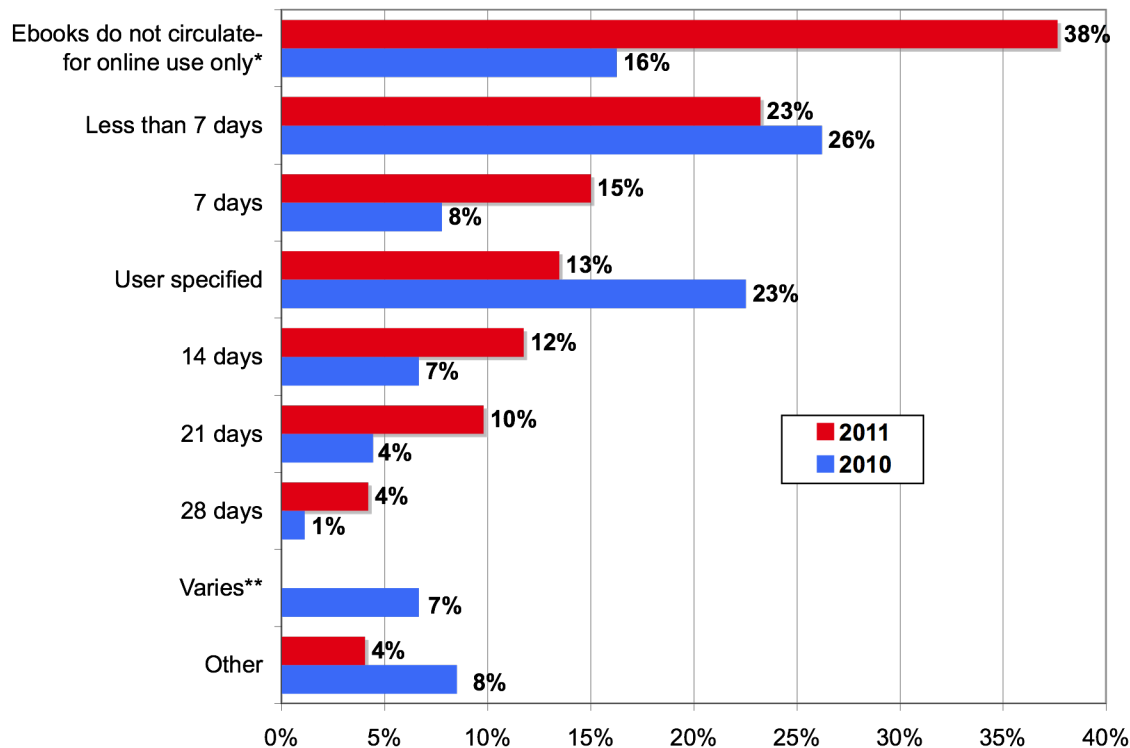

Added in 2011 survey.

Table 24. Q13: What ebook usage license model is currently employed at your library? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Single ebook use at a time	64%	65%	63%	66%	63%	59%	67%	68%
Unlimited access/ simultaneous use	69%	56%	52%	56%	61%	49%	53%	73%
Multiple ebook usage, but not unlimited	37%	22%	14%	26%	22%	9%	21%	39%
Other	9%	6%	2%	6%	5%	3%	5%	8%
Don't know	11%	10%	9%	9%	12%	13%	8%	8%
2010								
Single ebook use at a time	87%	81%	63%	79%	78%	66%	83%	87%
Unlimited access/ simultaneous use	84%	75%	68%	80%	75%	62%	74%	95%
Other	1%	2%	5%	2%	2%	4%	2%	0%

Ebook Circulation

Given that most of the ebook titles owned by academic libraries are general reference materials, it is not unusual that an increasing percentage of libraries are reporting that their ebook holdings do not circulate—"online use only" climbed from 16% last year to 38%. (Some of this change is due to our rephrasing of the question choices.) More academic libraries are discontinuing user-specified circulation intervals (down from 23% to 13%).

Figure 28. Q14: What is the circulation interval for ebooks at your library? —All academic libraries (multiple responses permitted)

Category	2011	2010
Ebooks do not circulate- for online use only*	38%	16%
Less than 7 days	23%	26%
7 days	15%	8%
User specified	13%	23%
14 days	12%	7%
21 days	10%	4%
28 days	4%	1%
Varies**		7%
Other	4%	8%

In 2010 survey, "Unlimited access, do not circulate" was not part of the question, but coded from "Other" comments.
*** In 2010 survey, "Varies" was not part of the question, but coded from "Other" comments.*

Community colleges are most likely to have circulating ebooks.

Table 25. Q14: What is the circulation interval for ebooks at your library? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
2011								
Ebooks do not circulate – for online use only	41%	37%	34%	34%	41%	42%	35%	34%
Less than 7 days	26%	23%	20%	24%	20%	18%	25%	26%
7 days	11%	19%	13%	16%	15%	11%	15%	21%
14 days	12%	12%	11%	14%	8%	8%	10%	16%
21 days	7%	12%	10%	10%	10%	10%	13%	6%
28 days	7%	3%	3%	5%	3%	2%	2%	8%
User specified	18%	10%	14%	12%	14%	11%	12%	16%
Other	4%	4%	4%	3%	4%	5%	2%	6%
2010								
Less than 7 days	22%	27%	36%	24%	29%	35%	28%	17%
7 days	9%	10%	4%	8%	7%	8%	11%	4%
14 days	8%	5%	4%	8%	4%	3%	9%	8%
21 days	7%	2%	4%	6%	3%	4%	7%	2%
28 days	0%	3%	0%	1%	1%	1%	0%	2%
User specified	21%	25%	21%	21%	25%	21%	19%	29%
Varies	10%	6%	0%	8%	5%	3%	4%	13%
Unlimited access, do not circulate	13%	15%	23%	16%	16%	17%	16%	13%
Other	11%	8%	9%	8%	9%	9%	5%	10%

Ebook Holds

In our 2011 survey, we asked two new questions about allowing students or faculty to place holds on ebooks—and whether the library has ever purchased additional digital copies to fulfill holds. Generally, libraries do not allow users to place holds on downloadable books (82% responded "no"). Still, 11% said they do allow holds, while a further 7% said they "sometimes" do, most likely due to special circumstances, such as a popular title or a required title for a course. This is the opposite of what we found in public libraries, where the majority did allow users to place holds on ebooks.

Figure 29. Q15: Do you allow students/faculty to place holds on downloadable books? —All academic libraries
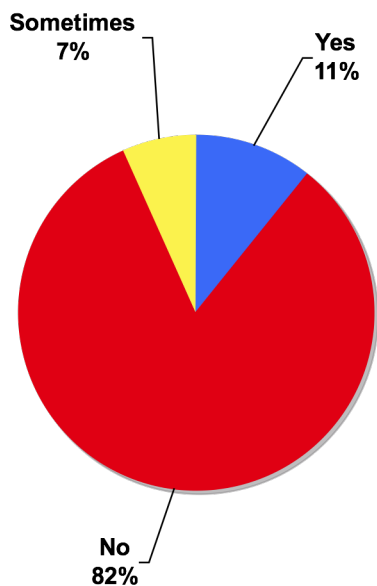
Undergraduate institutions are more likely than other types to allow library users to place holds on downloadable books.

Table 26. Q15: Do you allow students/faculty to place holds on downloadable books? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K–$999K*	*$1 Mil+*
Yes	7%	14%	11%	12%	10%	9%	10%	11%
No	85%	81%	82%	81%	84%	86%	82%	82%
Sometimes	8%	6%	7%	6%	6%	5%	8%	6%

Generally, academic libraries that do allow holds don't make a habit of buying additional copies to fulfill those holds—75% of those libraries that responded "yes" do not order extra digital copies to fulfill those holds.

Figure 30. Q16: Have you ever purchased extra digital copies to fulfill an ebook hold? —Academic libraries that allow holds on downloadable books

Yes
25%

No
75%
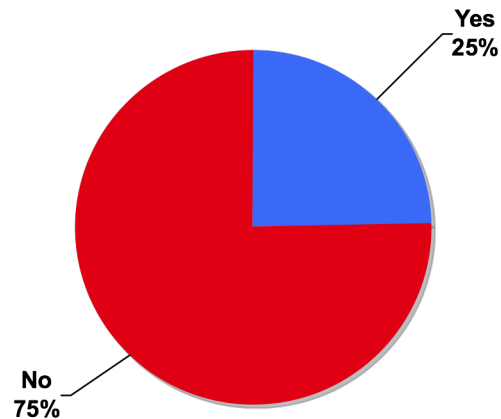
Given the very low base of respondents for this question, cross-tabulations do not yield particularly usable data.

Hardware Circulation

Do academic libraries circulate actual e-reading devices? Not generally; 66% of all academic libraries do not circulate preloaded e-readers, while 12% do. Less than one-quarter of libraries (22%) are considering it. These numbers are not significantly changed from last year's survey.

Figure 31. Q23: Does your library circulate preloaded e-reading devices? —All academic libraries

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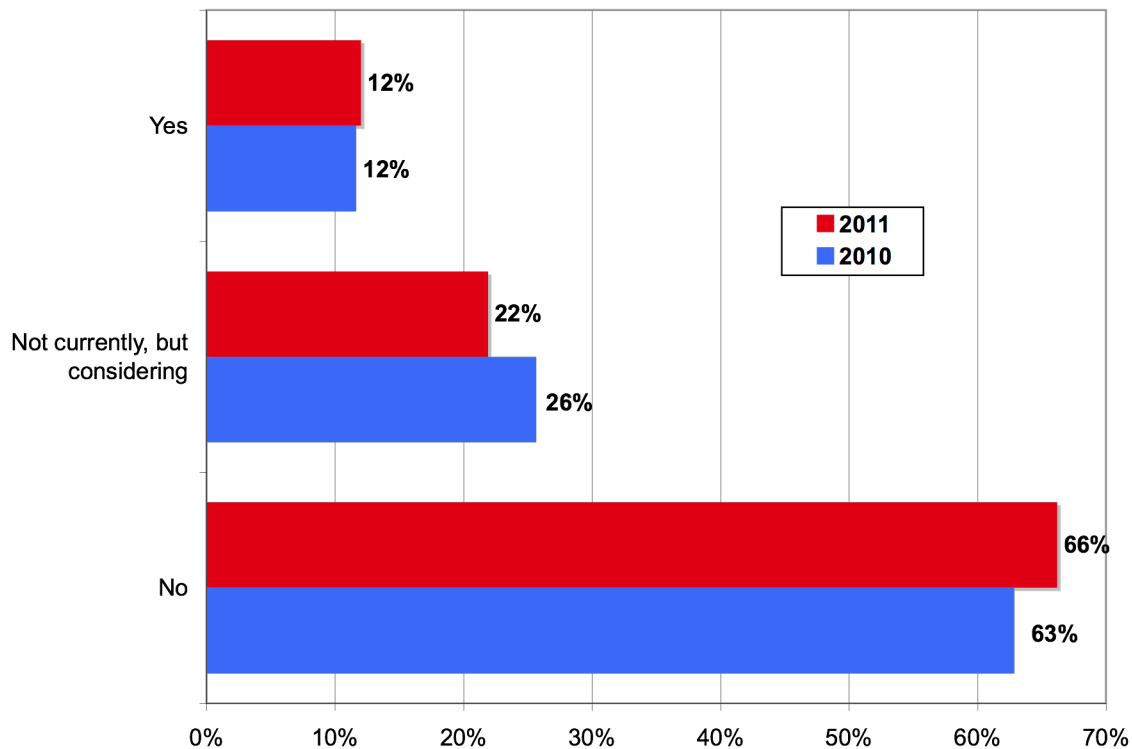
The chart above aggregates two "yes" sub-responses we added in our 2011 survey:

| Yes, for in-library use only	3%
Yes, for take home use	9%

Recall that many of academic libraries' ebooks are not available for commercially available ereaders, so there is little reason that libraries should offer them to users.

Table 27. Q23: Does your library circulate preloaded e-reading devices?
—Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K–$999K	$1 Mil+
2011								
Yes	11%	14%	11%	13%	11%	11%	13%	11%
Not currently, but considering	22%	20%	24%	21%	22%	15%	24%	26%
No	67%	66%	66%	66%	67%	74%	63%	63%
2010								
Yes	15%	11%	5%	13%	9%	4%	13%	18%
Not currently, but considering	32%	23%	25%	26%	24%	16%	27%	33%
No	54%	66%	70%	61%	66%	81%	61%	49%

In our 2011 survey, we added a question about the number of preloaded ereading devices libraries have on hand. Of the 12% that said that they circulated ereaders for library users, more than two-thirds have fewer than 10 devices (the mean is 9.2 devices, median 5.0). Fewer than 10% of respondents have 25 or more preloaded ereading devices.

Figure 32. Q24: If yes, how many preloaded ereading devices does your library maintain? —All academic libraries
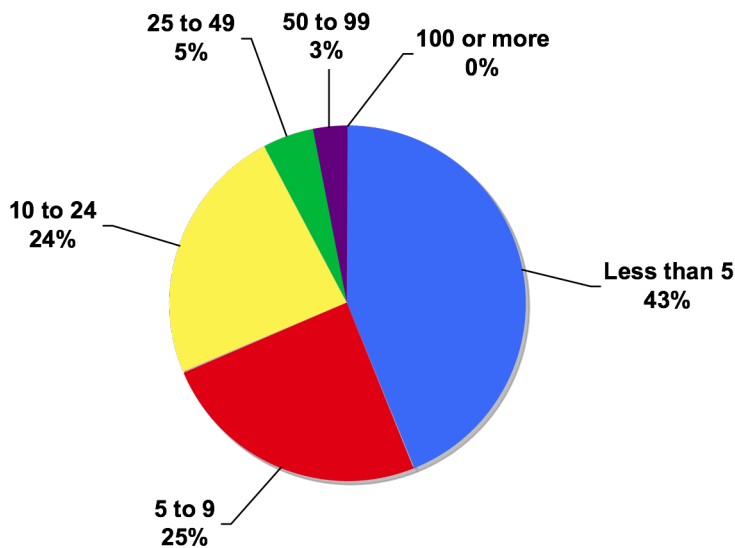
Graduate and professional institutions maintain a larger number of ereaders for users (13.1 on average). Libraries with very large acquisitions budgets also have a greater number of preloaded ereaders for users. The table below is based on a very small base, so the numbers are not projectable.

Table 28. Q24: If yes, how many preloaded ereading devices does your library maintain? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
Less than 5	30%	50%	50%	42%	53%	60%	56%	18%
5 to 9	20%	27%	25%	17%	33%	30%	28%	18%
10 to 24	40%	18%	13%	29%	13%	0%	17%	45%
25 to 49	0%	5%	13%	8%	0%	10%	0%	9%
50 to 99	10%	0%	0%	4%	0%	0%	0%	9%
100 or more	0%	0%	0%	0%	0%	0%	0%	0%
Mean	13.1	7.3	8.0	11.2	5.4	6.0	5.8	16.4
Median	8.0	4.5	4.5	5.0	4.0	3.5	4.0	12.0

Of the 12% of libraries that circulate hardware devices, the majority (72%, down from 81% last year) circulate Amazon Kindles. The Barnes & Noble Nook has seen an increase in favor—it is circulated by 41% of academic libraries that circulate ereading devices, up from 22% last year. Likely this is due to the release of the NookColor, which makes the B&N device more of a tablet PC (like an iPad) than a strict ebook reader like the Kindle. The iPad is the circulating device of choice for 32% of academic libraries, up four percentage points from last year.

Figure 33. Q25: If yes, which preloaded e-reading device(s) does your library circulate? —Academic libraries circulating e-reading devices (multiple responses permitted)
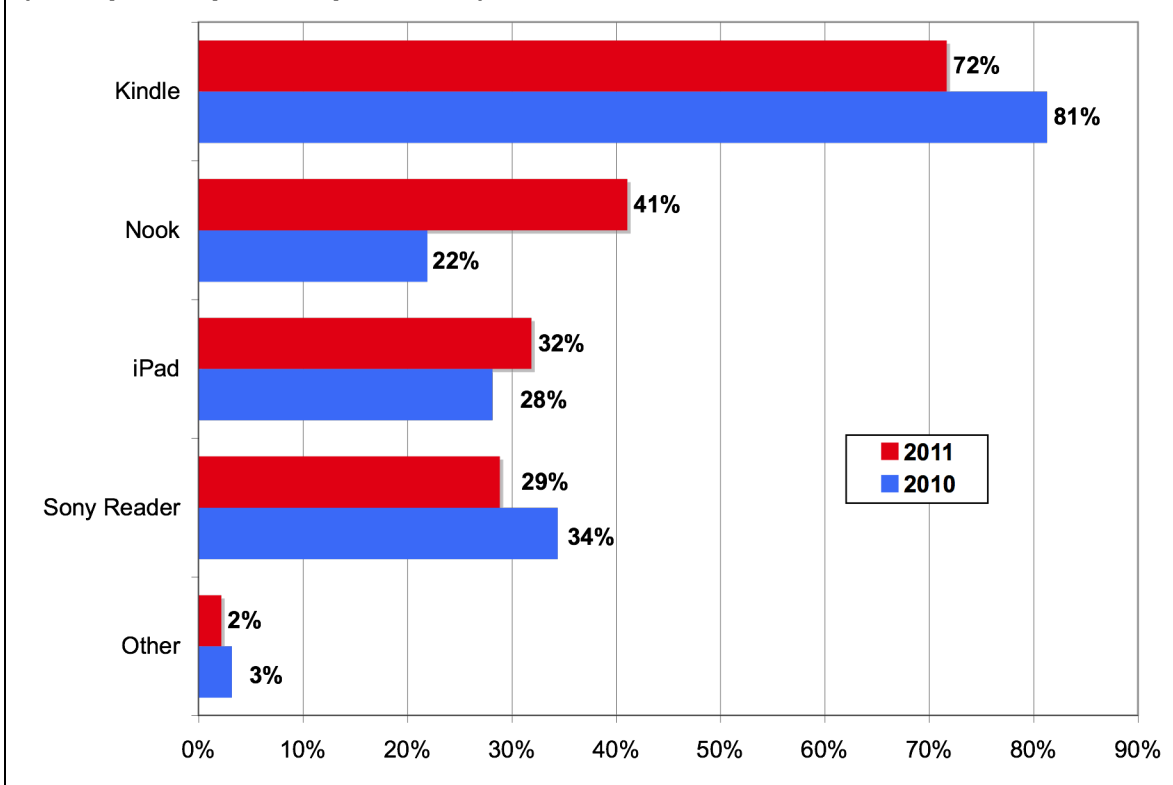
The table below breaks these data down by type of institution and acquisitions budget. Like the previous question, these data are based on a very small sample and is not projectable.

Table 29. Q25: If yes, which preloaded e-reading device(s) does your library circulate? —Academic libraries by type of institution and acquisition budget

|	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K–$999K*	*$1 Mil+*
2011								
Kindle	78%	85%	100%	76%	91%	67%	83%	82%
Sony Reader	28%	38%	0%	38%	27%	33%	33%	35%
iPad	33%	38%	0%	19%	45%	0%	42%	24%
Nook	17%	23%	0%	24%	18%	0%	25%	24%
Other	6%	0%	0%	5%	0%	0%	0%	6%
2010								
Kindle	80%	74%	56%	73%	67%	40%	70%	100%
Nook	30%	26%	89%	50%	27%	60%	25%	55%
iPad	50%	30%	11%	23%	47%	10%	30%	55%
Sony Reader	30%	26%	33%	31%	27%	30%	35%	18%
Other	0%	4%	0%	0%	7%	0%	5%	0%

Ebook Circulation Trends

Circulation Figures

In the 2011 survey, we asked specifically about ebook circulation in the 2009/2010 and 2010/2011 academic years. As the two charts below show, ebook circulation has increased considerably in the last two years. For the 2009/2010 academic year, the mean ebook circulation was 6,849 (median 2,000). For the 2010/2011 academic year, mean ebook circulation rose to 8,273 (median 2,200).

Figure 34. Q17: What was your ebook circulation in the 2009–2010 academic year? —All academic libraries
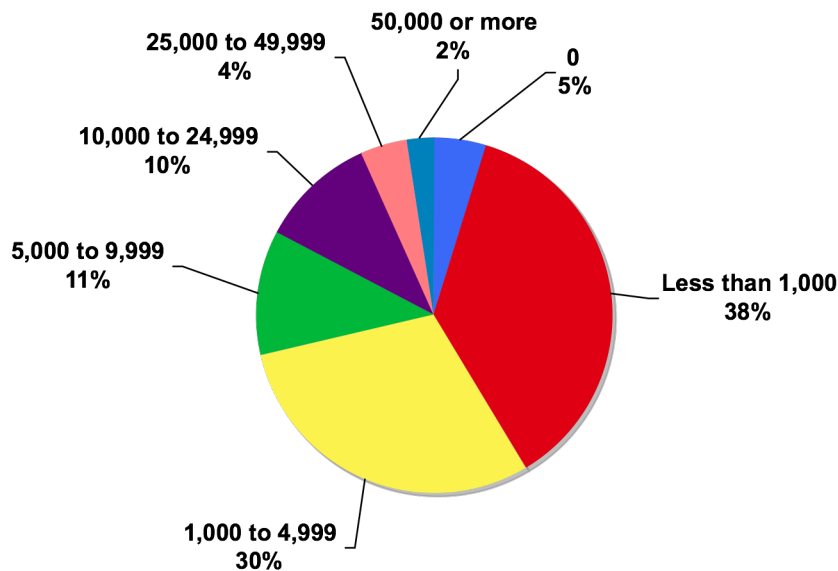
Figure 35. Q17: What was your ebook circulation in the 2010–2011 academic year? —All academic libraries
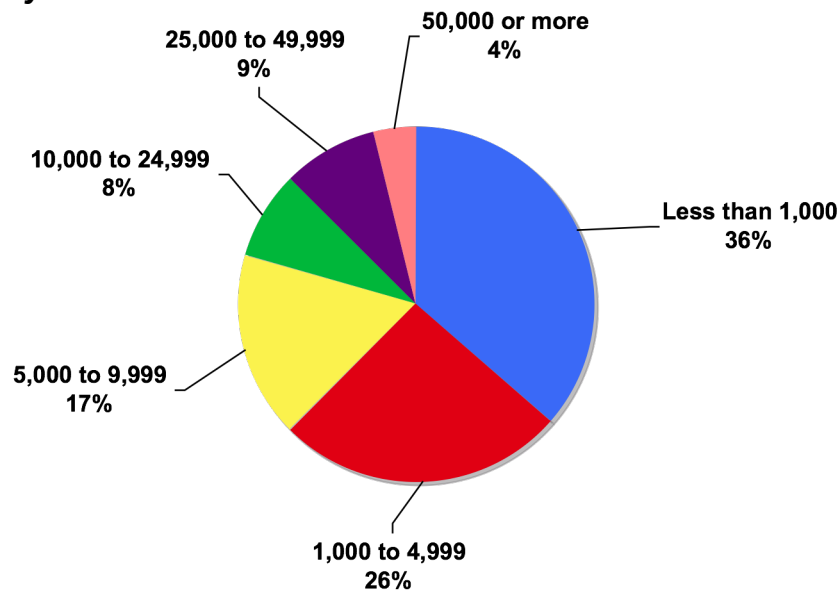
Graduate and professional level libraries have the biggest ebook circulation numbers and have seen the largest increase in mean circulation in the past year.

Table 30. Q17: What was your ebook circulation in the 2009–2010 and 2010–2011 academic years? —Academic libraries by type of institution and acquisition budget (Data from 2011 survey only)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
2009–2010								
0	6%	5%	4%	2%	6%	11%	0%	6%
Less than 1,000	19%	44%	39%	39%	40%	41%	42%	25%
1,000 to 4,999	19%	32%	36%	31%	31%	41%	28%	19%
5,000 to 9,999	6%	15%	11%	12%	9%	4%	19%	6%
10,000 to 24,999	25%	2%	11%	10%	9%	4%	7%	25%
25,000 to 49,999	19%	0%	0%	2%	6%	0%	5%	6%
50,000 or more	6%	2%	0%	4%	0%	0%	0%	13%
Mean	16,232	4,760	3,235	7,890	4,398	1,915	4,886	17,734
Median	12,500	1,000	1,870	2,362	1,345	820	1,429	4,633
2010–2011								
Less than 1,000	31%	34%	43%	39%	37%	52%	35%	19%
1,000 to 4,999	6%	32%	32%	27%	29%	37%	28%	6%
5,000 to 9,999	6%	24%	14%	14%	17%	7%	21%	25%
10,000 to 24,999	6%	7%	11%	8%	9%	4%	9%	13%
25,000 to 49,999	38%	0%	0%	6%	9%	0%	5%	25%
50,000 or more	13%	2%	0%	6%	0%	0%	2%	13%
Mean	20,780	5,585	3,329	9,114	5,648	2,187	5,988	21,137
Median	19,964	1,576	1,494	2,200	1,576	743	2,200	9,822

Ebook Circulation Increasing/Decreasing

Do academic libraries anticipate that ebook circulation will continue increasing or begin decreasing? And by how much?

Academic libraries in general are bullish on ebook circulation increasing, even if not as much as a year ago. Two-thirds (67%) of libraries expect ebook circulation to continue rising over the next school year. When asked to estimate the percentage increase or decrease in ebook circulation, the overall average computes to +17%.

Figure 36. Q18: Compared to this school year, do you expect next year's circulation of ebook titles to increase, stay the same or decrease? —All academic libraries
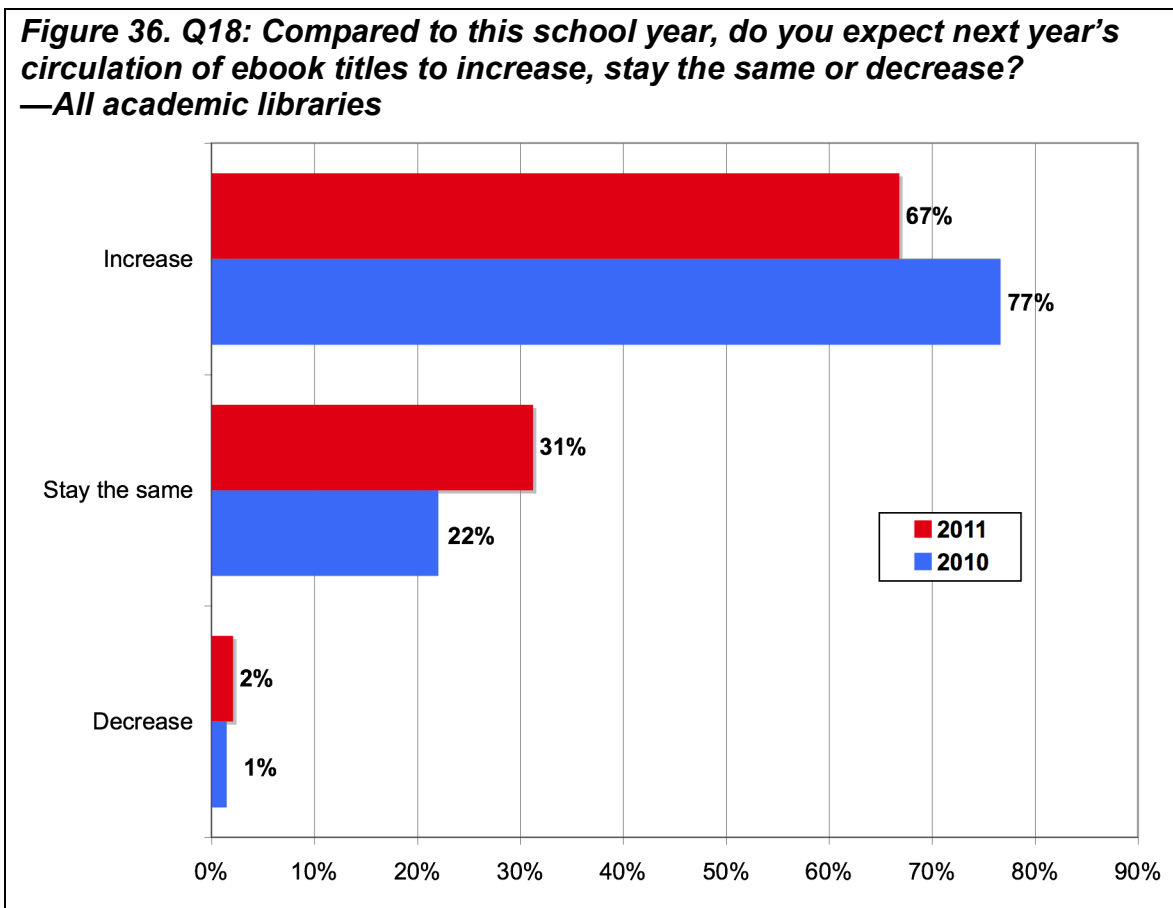
We also asked our respondents to estimate how much of an increase or decrease they expected:

	2010	2011
Average % increase	24%	25%
Average % decrease	43%	6%
Overall % change expected	*+18%*	*+17%*

Undergraduate institutions and community colleges project slightly larger increases for circulation in 2011/2012 than in the last academic year. Graduate and professional institutions anticipate circulation growth in the next year, however their expectations are a little more tempered than previously.

Table 31. Q18: Compared to this school year, do you expect next year's circulation of ebook titles to increase, stay the same or decrease? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Increase	80%	67%	51%	67%	65%	51%	67%	79%
Less than 10%	20%	20%	34%	23%	23%	31%	24%	18%
10% to 24%	45%	58%	59%	57%	54%	53%	62%	47%
25% to 49%	20%	7%	0%	11%	5%	3%	4%	18%
50% to 74%	13%	7%	6%	7%	10%	6%	6%	13%
75% to 99%	0%	1%	0%	0%	2%	0%	1%	0%
100% or more	3%	7%	9%	6%	7%	6%	7%	4%
Average % increase	23%	27%	25%	23%	29%	23%	28%	24%
Stay the same	18%	33%	44%	31%	34%	47%	31%	20%
Decrease	2%	0%	5%	2%	2%	2%	2%	1%
Average % decrease	0%	0%	6%	6%	0%	0%	6%	0%
Overall Percent change Expected	+18%	+18%	+13%	+15%	+19%	+11%	+18%	+19%
2010								
Increase	83%	71%	72%	79%	74%	60%	79%	87%
Less than 10%	6%	8%	23%	11%	10%	17%	10%	9%
10% to 24%	49%	57%	46%	49%	52%	48%	56%	46%
25% to 49%	29%	23%	18%	26%	26%	22%	21%	32%
50% to 74%	10%	10%	8%	6%	12%	11%	9%	7%
75% to 99%	1%	0%	0%	1%	0%	0%	1%	0%
100% or more	3%	2%	3%	5%	0%	2%	0%	7%
Average % increase	27%	22%	19%	26%	21%	21%	20%	29%
Stay the same	17%	28%	24%	20%	24%	35%	21%	13%
Decrease	0%	2%	4%	1%	2%	5%	0%	0%
Average % decrease	0%	10%	60%	90%	20%	43%	0%	0%
Overall Percent change Expected	+22%	+16%	+12%	+19%	+15%	+10%	+16%	+26%

Barriers to Ebook Consumption

What are those factors that hamper or hinder library users from accessing ebook content? The top item remains "unaware of ebook availability," selected by 58% of respondents (down from 62% last year). The number two item climbs up from the number five position last year—"users prefer print" (selected by 47% of respondents, up from 40%). In third place, "Difficult to read onscreen/online" drops from 52% to 45%.

Last year's number two issue, "difficulty with DRM," drops to number five, 35% (down from 55%) of respondents. On the one hand, DRM is getting a little less problematic, and on the other hand, libraries have simply become used to the issues involved with it (as our verbatim responses indicated) and it has become less of a hindrance for library users, even if librarians still have their own issues with it.

Figure 37. Q26: *What hinders students/faculty from reading your library's ebook content? —All academic libraries* (multiple responses permitted)
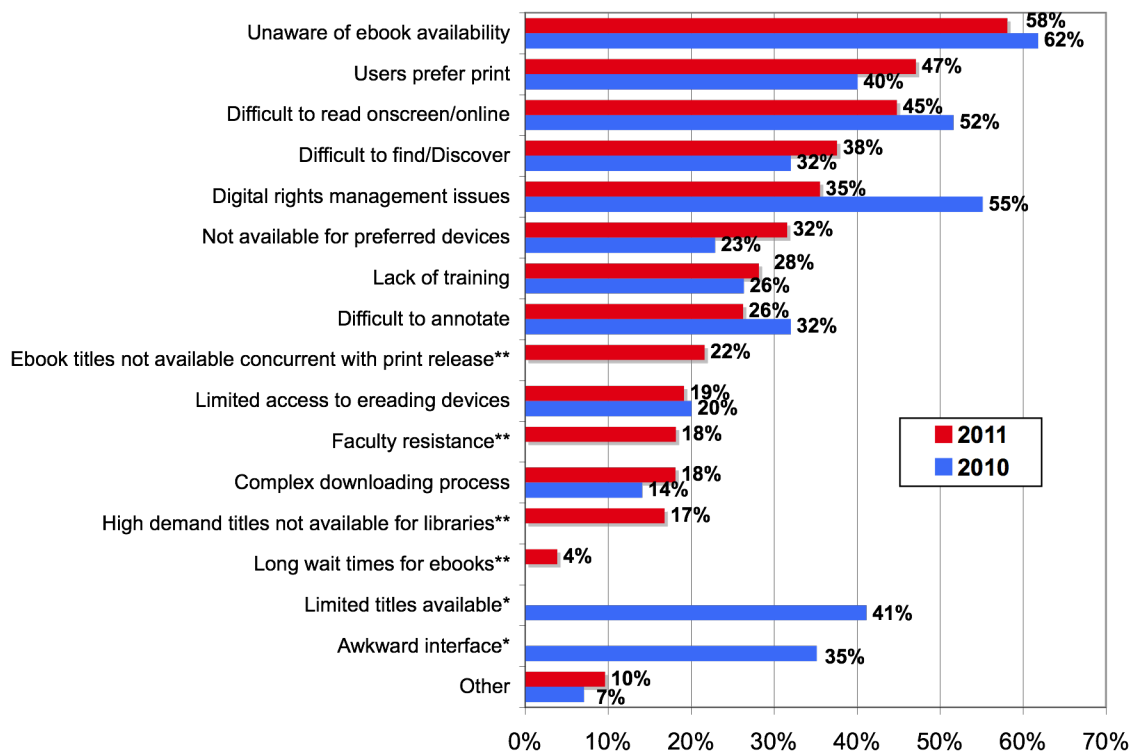
*Included in 2010 survey only.
**Added to 2011 survey.

Graduate/professional institutions are most likely of all three segments to cite "difficult to find/discover" (48%) and "digital rights management issues" (43%).

***Table 32. Q26: What hinders students/faculty from reading your library's ebook content? —Academic libraries by type of institution and acquisition budget** (multiple responses permitted)*

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Unaware of ebook availability	53%	60%	60%	57%	60%	57%	63%	51%
Users prefer print	41%	52%	46%	44%	55%	54%	51%	36%
Difficult to read onscreen/online	42%	51%	38%	44%	47%	44%	45%	48%
Difficult to find/Discover	48%	33%	32%	38%	36%	28%	38%	44%
Digital rights management issues	43%	35%	27%	34%	36%	21%	29%	57%
Not available for preferred devices	33%	32%	29%	31%	30%	25%	31%	38%
Lack of training	23%	29%	33%	29%	28%	31%	32%	22%
Difficult to annotate	33%	28%	14%	24%	29%	21%	25%	34%
Ebook titles not available concurrent with print release	28%	17%	21%	24%	15%	17%	14%	34%
Limited access to ereading devices	18%	20%	19%	21%	15%	15%	22%	18%
Faculty resistance	14%	17%	25%	20%	17%	15%	15%	24%
Complex downloading process	17%	20%	15%	15%	20%	21%	16%	19%
High demand titles not available for libraries	20%	15%	15%	15%	16%	11%	16%	20%
Long wait times for ebooks	2%	4%	6%	5%	2%	3%	3%	5%
Other	8%	9%	13%	10%	9%	16%	8%	6%
2010								
Unaware of ebook availability	61%	55%	73%	62%	62%	70%	61%	59%
Difficulty with DRM	58%	59%	46%	55%	55%	46%	54%	61%
Difficult to read onscreen/online	48%	60%	57%	52%	50%	51%	57%	45%
Limited titles available	52%	39%	21%	37%	47%	38%	32%	53%
Users prefer print	34%	36%	50%	41%	39%	42%	42%	34%
Awkward interface	35%	38%	30%	33%	38%	24%	38%	40%
Difficult to find/Discover	38%	28%	38%	32%	31%	36%	24%	35%
Difficult to annotate	34%	33%	25%	31%	33%	28%	33%	35%
Lack of training	18%	24%	41%	26%	27%	38%	29%	14%
Not available for preferred devices	26%	26%	14%	24%	20%	14%	26%	26%
Limited access to ereading devices	22%	18%	18%	22%	18%	13%	21%	24%
Complex downloading process	16%	14%	5%	18%	9%	7%	9%	26%
Other	7%	7%	5%	7%	8%	7%	6%	8%

Technical Problems

Almost two-thirds (64%) of academic libraries report that users rarely or never have technical problems with ebooks. In fact, libraries citing that users "never" report technical problems grew from 8% last year to 19% in 2011.

Figure 38. Q27: How often do your users report technical problems when downloading an ebook? —All academic libraries
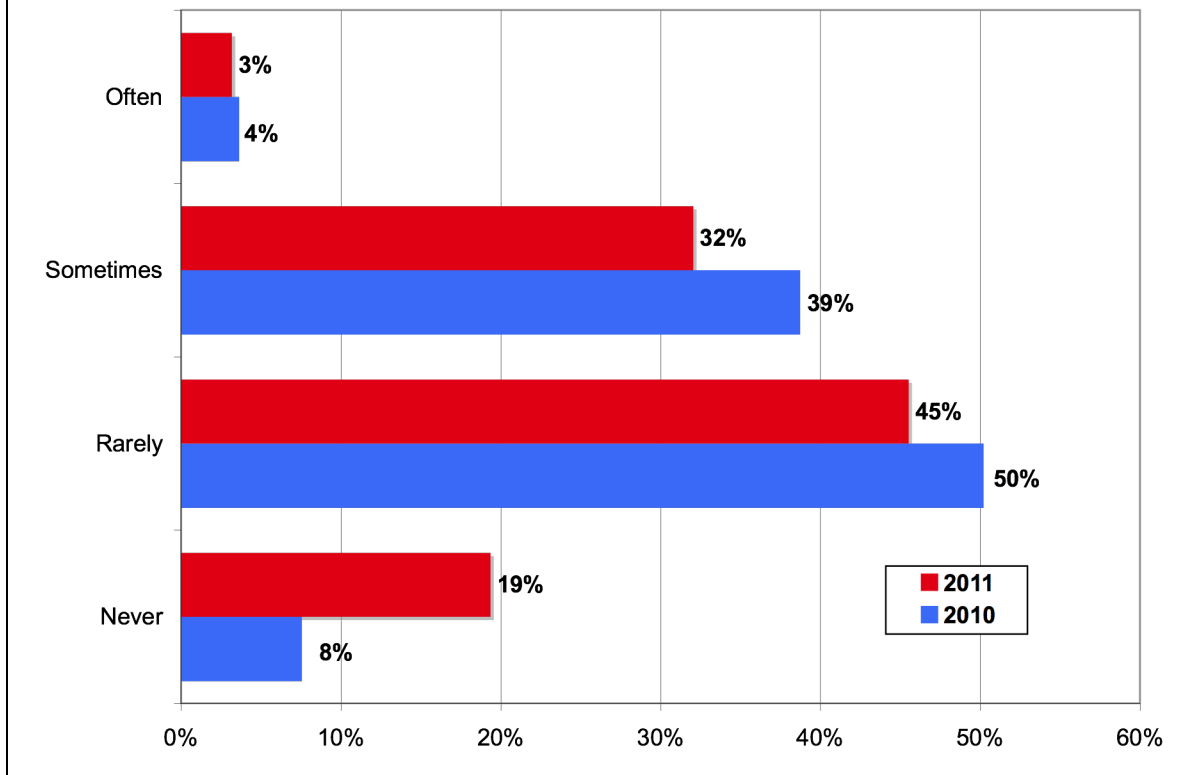
In the table below, we find the "rarely" and "never"s clustered among community colleges (77% combined "rarely" and "never" responses). Possibly, they get relatively few tech reports because they don't circulate as many ebooks as other types of institutions.

Table 33. Q27: How often do your users report technical problems when downloading an ebook? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Often	4%	4%	1%	3%	3%	3%	1%	5%
Sometimes	39%	29%	29%	32%	31%	27%	28%	41%
Rarely	45%	46%	46%	45%	44%	40%	50%	44%
Never	13%	21%	24%	19%	22%	30%	21%	10%
2010								
Often	2%	7%	0%	3%	4%	3%	6%	2%
Sometimes	50%	34%	23%	38%	41%	39%	32%	46%
Rarely	45%	50%	66%	53%	46%	41%	56%	51%
Never	3%	9%	11%	6%	9%	17%	6%	1%

General Conclusions

The decision by libraries to add ebooks to their collections has been predominantly faculty- and user-driven, and the last couple of years have seen a critical mass of demand being achieved. However, as the comments included below and at the end of Chapters 3 and 5 indicate, not every library is in complete agreement about the extent to which their users are adopting ebooks. Many users still rely on print, for practical reasons (annotation, citation) as well as logistical reasons (availability).

The biggest stated barrier to greater ebook circulation is lack of awareness that ebooks are available, and while DRM (digital rights management) issues are declining as a significant challenge, there has been a modest rise in preference for the print version of academic titles. As some of the comments suggest, DRM issues may be having an impact on a preference for a print edition.

Still, academic libraries have gone past the tipping point and have amassed ebook collections, and circulation is rising. The issue now is ironing out the wrinkles and making ebook access work for library users.

In Their Own Words...

Here we continue the comments from our open-ended question soliciting academic libraries' thoughts and concerns about ebooks in their library (lightly edited).

- NetLibrary has been excellent for faculty and students—very concerned about EBSCO takeover and limited circulation models now. Best situation is for libraries to be able to acquire perpetual access for all users with no annual maintenance fees or other licenses.

- Students and faculty require easy access and easy download/reading of ebooks; helpful if the acquisitions of these ebooks would not as costly and restrictive re: licensing.

- Free MARC records would facilitate access; need promotion ideas.

- As mentioned earlier, most librarians are not paying attention to ebooks because they've never used one on a mobile device (ereader, iPhone, or iPad) and a big hurdle is making librarians familiar enough with ereaders to ask the "right" questions of vendors. For example, I had no idea how important bookmarking and writing on a page would be, until I used my iPad as an ereader.

- Answered questions with textbooks largely in mind. Ebooks are not always the same. Answered some questions subject to what is available through our university consortium, not paid out of our budget.

- There has been a recent interest in purchasing the NookColor ereader. Librarians are trying to figure a way to incorporate them for use by either students, staff, faculty or all. Most, if not all, students that we, librarians, suggest an ebook to, even if it is the most relevant title available in order to complete an assignment, the student is reluctant and passes it over for a book in print.

- The publishers make it so difficult to offer this vital resource. It's a major struggle.

- In recent study conducted here, our professional students indicated still prefer print for studying; electronic for looking up pieces/bits of info and facts.

- At first librarians were asking when should I purchase ebooks over the hard copy. Since admin has stated a desire to see the library as a portal of information, I decided to push the idea that we should always buy the ebook when available as long as the teaching faculty are okay with using the ebook in class instead of the hard copy.

- We are a completely 100% online school, so we have no print books, our entire collection is completely digital. Ebooks are extremely important to us and we are struggling to get the e-books we need for students, but many times they are not available as ebooks (many of the SAGE research titles).

Would love for there to be more ebook availability so we have the option to purchase these books.

- While they are still harder to use than print, the advent of Ebrary and iPads make them far more serious contenders. Coupled with declines in print circulations, this appears the future of reader, for better or for worse.

- Demand is only increasing, even with slow adopters. Once they realize they can have it immediately, they are sold on the e format, even if they would have preferred print. Buying ebooks now means the librarian who follows me in this job won't have to weed print that never circulated!

- My library hopes to update and expand its ebook collection. We know we are lagging behind in this area. We do have concerns about the legalities of loaning preloaded Kindles and such. The idea of how long you actually license/own the digital content is also a concern.

- We have a large number of distant education and online students, so the ebook is a preferred format.

- We are barely getting started with ebooks. There is a lack of ebooks in the fields of Religion and Theology.

- Our patrons won't use them until the faculty "force" them to use them. The faculty are just waking up to the possibilities. We expect that ebooks will take off soon, in one or two disciplines, and then the others will be angry because they don't have ebooks, too. Then access will matter. To date, it has not.

- I do believe that ebooks are the wave of the future.

- Still encounter a good deal of patron reluctance towards them.

- The more "book-like" the ebooks are, the more the students seem to like them. (In other words, they have page numbering just like the print book has, illustrations, table of contents, book cover art, etc.) With those features, they identify the ebook as a "book" more easily, and feel more comfortable with using it as a "book" source for their papers and assignments. If it is just HTML with no pagination, they see the ebook as just another website.

- We have found that no matter which format we select (ebook or print) users will ask for the other.

- We're just learning, and so are our patrons. Kindle circulation with free content (purchased by the library at no cost to the user) has had lackluster circulation.

- Overdrive contract with KS expires Dec 2011 and we won't renew since they want 700x the fees.

- There has been resistance to ebooks due to a disconnect between users and library staff so our ebook collection is 13 years old. I hope this will change soon!

- We see an increase in usage but worry about ease of use, a single platform would be best (pie in the sky goal).

- most of our ebooks have been purchased through NetLibrary, which is now owned by EBSCO. We are in the process of setting up a "purchase on demand" system, and we hope to use Gobi (YBP/Baker & Taylor) for future individual ebook purchases. Marketing ebooks and assuring off-campus access have been our two biggest hurdles.

- By library and faculty, use is expected to increase several fold over the next 5 years.

- Providing phone support for ebooks is migraine-inducing, especially vendors like OverDrive with their double Mother May I download/update software nonsense. Patrons are frustrated, librarians are frustrated. The lack of quick and easy access to online titles, either because the title is "checked out" or incompatible with a patron's personal equipment, usually results in patrons feeling very poorly served.

4. EBOOKS, PRINT BOOKS, AND ACQUISITION BUDGETS

Ebooks and the Library's Acquisition Budget

How do libraries account for ebooks in their budget? And has that changed at all from last year? Are ebooks considered part of electronic resources, part of print resources, or are they their own budget line item?

At present, 63% of academic libraries account for ebooks as part of electronic resources/digital content (up from 50% last year), while 43% account for ebooks in the print resources budget (up from 35%). Seventeen percent of academic libraries have a separate budget line dedicated to ebooks, up slightly from 14%).

Figure 39. Q34: How are ebooks represented in your library's acquisition budget? —All academic libraries (multiple responses permitted)
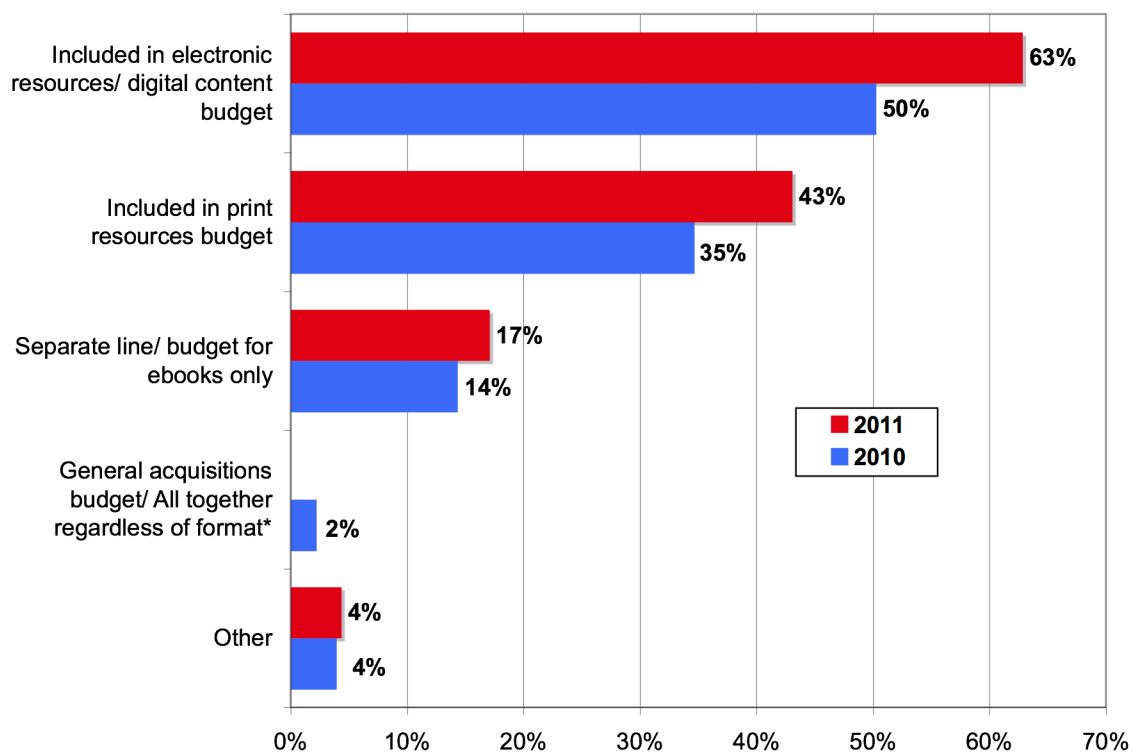
Included in 2010 survey only.

Generally, libraries with the largest budgets are most likely to have a separate line item for ebooks only, even if that is less than one-third (28%) of them.
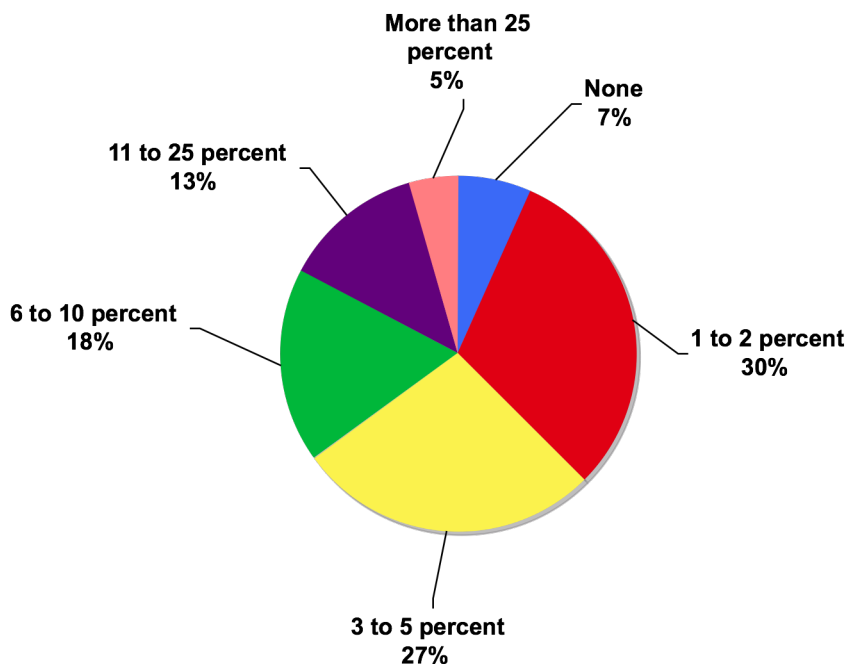
Table 34. Q34: How are ebooks represented in your library's acquisition budget? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Included in electronic resources/digital content budget	65%	61%	62%	63%	61%	62%	68%	58%
Included in print resources budget	41%	46%	41%	46%	40%	42%	40%	51%
Separate line/budget for ebooks only	27%	14%	9%	14%	19%	9%	10%	28%
Other	6%	1%	7%	4%	3%	4%	4%	3%
2010								
Included in electronic resources/digital content budget	41%	55%	55%	49%	51%	59%	55%	39%
Included in print resources budget	34%	31%	43%	39%	29%	29%	33%	41%
Separate line/budget for ebooks only	22%	11%	5%	15%	13%	13%	8%	23%
General acquisitions budget/All together regardless of format	1%	2%	3%	1%	4%	2%	1%	2%
Other	8%	4%	0%	2%	7%	0%	6%	5%

Ebooks in Last Year's Acquisition Budget

Our 2011 respondents estimated that last year ebooks comprised, on average, about 7% of their library's acquisitions budget (6.7% mean; 3.9% median).

Figure 40. Q35: What percentage of your library's acquisitions budget did ebooks represent <u>last year</u>? —All academic libraries

By type of institution and size of acquisitions budget, this broke down as follows:

Table 35. Q35: What percentage of your library's acquisitions budget did ebooks represent <u>last year</u>? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K–$999K*	*$1 Mil+*
None	6%	7%	7%	6%	9%	12%	7%	3%
1 to 2 percent	22%	37%	31%	30%	34%	27%	37%	28%
3 to 5 percent	29%	32%	18%	26%	29%	32%	26%	28%
6 to 10 percent	19%	18%	16%	19%	15%	5%	23%	20%
11 to 25 percent	17%	5%	20%	15%	8%	17%	6%	16%
More than 25 percent	6%	2%	7%	4%	5%	7%	2%	5%
Mean %	8.2	4.7	8.5	6.9	6.1	7.4	5.1	7.8
Median %	4.5	3.4	4.3	4.1	3.5	3.7	3.5	4.4

Ebooks in the Current Acquisition Budget

Currently, ebooks represent an average of 8.7% of academic libraries' total acquisitions budgets (median 5.0%); a two percent increase in just one year.

Figure 41. Q35: What percentage of your library's acquisitions budget do ebooks <u>currently</u> represent? —All academic libraries
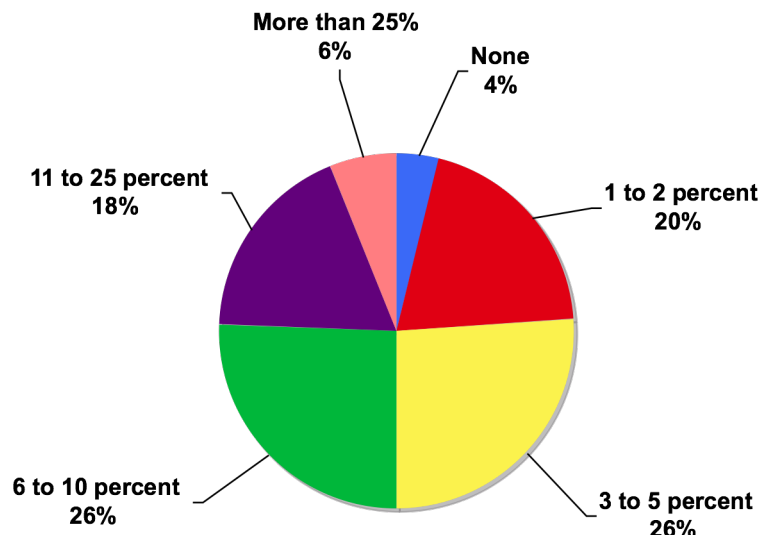
Graduate/professional institutions (10.5%) and community colleges (9.9%) are dedicating the highest percentage of acquisition budgets to ebooks.

Table 36. Q35: What percentage of your library's acquisitions budget do ebooks currently represent? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
None	3%	4%	4%	3%	5%	8%	4%	0%
1 to 2 percent	14%	22%	24%	20%	21%	24%	23%	13%
3 to 5 percent	17%	37%	18%	22%	36%	25%	31%	27%
6 to 10 percent	30%	22%	25%	27%	20%	17%	27%	28%
11 to 25 percent	29%	11%	18%	21%	12%	15%	13%	24%
More than 25%	6%	3%	11%	7%	5%	10%	3%	8%
Mean %	10.5	6.7	9.9	9.4	7.3	8.8	6.9	10.4
Median %	8.0	4.3	6.7	6.7	4.3	4.4	4.5	7.4

Ebooks in the Future Acquisition Budget

The following chart shows an increased expectation of academic libraries toward higher spending on ebooks in five years. More than one-third (35%) of respondents say that ebooks will represent more than 25 percent of their acquisition budget in five years (up from 31% last year), while another third (33%, up from 30%) say ebooks will represent 11 to 25 percent. The remaining 34% (down from 38%) forecast that ebooks will represent 10 percent or less of their acquisitions budget in 2016.

On average, academic libraries predict that ebooks will represent 19.1 percent of their acquisition budget in 2016 (median 18.5 percent). This is greater than last year's respondents, who felt that ebooks would represent on average 18.0 percent of their acquisitions budget five years hence (that is, in 2015).

Figure 42. Q35: What percentage of your library's acquisitions budget do you predict ebooks will represent <u>in 5 years</u>? —All academic libraries
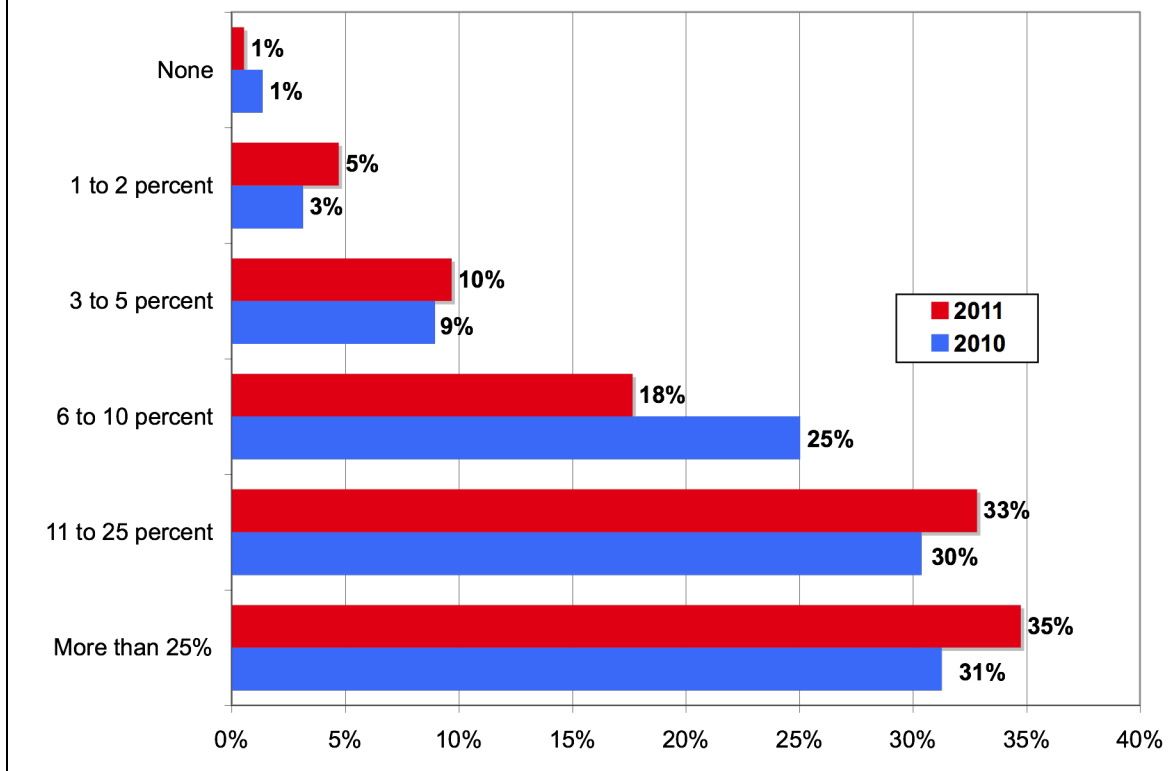
Over 40% of graduate/professional institution libraries (41%) anticipate spending more than a quarter of their acquisitions budgets on ebooks in five years. Percentage-wise spending by community colleges approaches the same level (38%). Undergraduate institutions' ebook spending expectations are more tempered.

Table 37. Q35: What percentage of your library's acquisitions budget do you predict ebooks will represent _in 5 years_? —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< $100K	$100K– $999K	$1 Mil+
2011								
None	2%	0%	0%	0%	1%	2%	0%	0%
1 to 2 percent	3%	4%	7%	6%	4%	8%	5%	3%
3 to 5 percent	5%	15%	7%	9%	13%	8%	14%	7%
6 to 10 percent	11%	23%	16%	14%	25%	17%	23%	11%
11 to 25 percent	38%	30%	31%	37%	26%	31%	29%	40%
More than 25%	41%	28%	38%	35%	30%	34%	29%	40%
Mean %	21.4	17.0	19.7	19.6	17.0	18.3	17.1	21.4
Median %	21.8	14.8	19.6	19.3	14.2	17.6	14.7	21.5
2010								
None	1%	3%	0%	1%	2%	2%	2%	0%
1 to 2 percent	3%	5%	3%	2%	4%	9%	2%	0%
3 to 5 percent	8%	5%	18%	9%	9%	14%	7%	8%
6 to 10 percent	27%	27%	13%	19%	32%	16%	27%	29%
11 to 25 percent	31%	31%	33%	35%	25%	36%	29%	29%
More than 25%	29%	30%	35%	35%	27%	23%	32%	35%
Mean %	17.7	17.5	19.0	19.4	16.3	16.0	18.1	19.2
Median %	15.7	15.7	18.5	18.8	12.2	14.5	16.3	17.7

2010-2011 Spending On Ebooks

In a new question, we asked how much academic libraries spent on ebooks during the 2010–2011 academic year. On average, academic libraries spent $65,000 on ebooks (median $17,500). One-fourth of libraries spent $25,000 or more on ebooks in the last academic year.

Figure 43. Q33: Approximately how much would you estimate your library spent on ebooks during the current (2010-2011) academic year? —All academic libraries
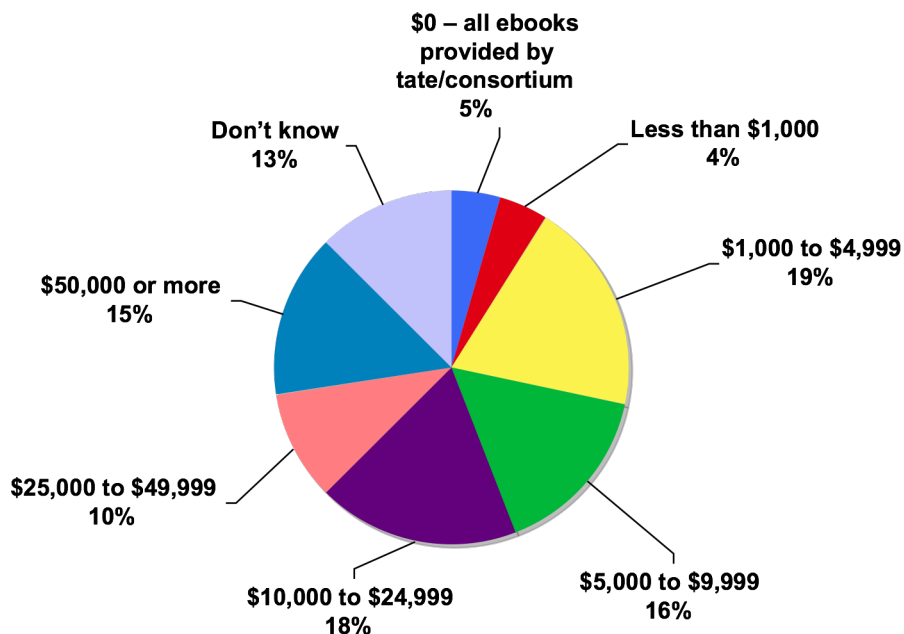
Graduate/professional academic libraries spent, on average, $142,000 on ebooks in the 2010-2011 academic year. Undergraduate libraries spent $36,000 and community colleges spent $14,000.

Table 38. Q33: Approximately how much would you estimate your library spent on ebooks during the current (2010-2011) academic year? — Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
$0 – all ebooks provided by state/consortium	3%	4%	9%	4%	5%	11%	4%	0%
Less than $1,000	3%	4%	7%	5%	4%	7%	5%	1%
$1,000 to $4,999	11%	20%	29%	20%	21%	46%	17%	3%
$5,000 to $9,999	8%	19%	22%	14%	21%	17%	26%	6%
$10,000 to $24,999	15%	23%	16%	18%	21%	11%	26%	14%
$25,000 to $49,999	8%	14%	7%	11%	9%	3%	8%	20%
$50,000 or more	35%	7%	1%	15%	12%	0%	2%	41%
Don't know	18%	11%	9%	15%	8%	4%	12%	15%
Mean	142,272	36,356	14,123	59,364	48,964	6,836	16,986	159,105
Median	37,500	12,500	7,500	17,500	7,500	3,000	7,500	37,500

General Conclusions

In terms of budgeting, ebooks still represent a small percentage of academic libraries' overall acquisition budget, although it has grown from around 8% to 10% of the total acquisitions budget in the past year. Libraries expect that percentage to double in the next five years. On average, academic libraries spent $65,000 on ebooks in the 2010-2011 academic year.

In Their Own Words...

Here, we continue the write-in "verbatim" responses to the questionnaire item soliciting comments about ebooks.

- We originally purchased large e-book collections from NetLibrary to launch this service and get a toehold. We later transitioned to concentrating upon replacing print reference materials as we are a four campus college and the duplication of reference materials for each campus library was very expensive. We find however that there isn't always an exact match between print and digital due the missing text related to DCMA and just plain old sloppy omissions and mistakes. So we maintain a backup collection of such things as the Gale literature ref. collections. Over the past ten years when asking other librarians the question at various university library meetings the answer to "how much use are you experiencing on ebooks?" was always the same "not much." I blame this on the purchase of large, cheap, general subject and generic ebook collections that appealed to few students but looked good on the collection development records. Ebook collections like Safari do quite well as they are more specific and targeted at audiences. This is especially true when this style (pick and choose) of collection is given the same amount of attention as the book collections.

- We have just subscribed to a large academic collection of ebooks, and we will be taking a close look at how and how much they will be used by patrons over this academic year.

- The lack of significant content available for art and design is a major factor in our ebook use.

- We only just started this subscription and want to see how it goes. Right now the faculty and staff are the largest users. We will really know better during the next academic year.

- Patrons are becoming more interested in using ebooks.

- Every vendor has different rules and options and it makes it difficult to teach ebooks to students. We prefer to purchase individual titles rather than bundles since many titles are not relevant.

- Ebooks are about 2/3 of our monograph budget and are used much more than print books. I think in the next 5 years, we will have moved most of our print collection offsite. We have already disbanded our reference collection because ebooks are a better option.

- We don't really circulate ebooks, not like print books circulate. We collect usage statistics (usually based on COUNTER) for them.

- Since we specialize in social sciences, and have business and education as our main fields, articles are better for students to read. Undergraduates often don't come to the library but use their own computers anywhere.

- Many questions on the survey talk about how we deal with the "ebook collection" but it really isn't one collection—it is content from multiple sources (vendors, publishers, aggregators) on multiple platforms and one answer couldn't really apply to many of the questions. Being able to purchase all or most through a vendor (e.g. YBP) would help us buy more and manage better, but it seems the publishers and vendors are not playing well together in many cases.

- They're extremely popular, even in the arts and humanities.

- Plans to add Safari and Coutts/myiLibrary when funding becomes available.

- NetLibrary books are last resort for students when physical books unavailable in their topic.

- We are just researching ebooks as an option. Currently we only offer Netlibrary offerings and they are outdated. We are interested in what EBSCO will offer now that they have taken over.

- I expect that we will be adding more as preferred platforms and purchase or licensing models are designated and when the ebook is available as soon as the print is available.

- One factor we are still overcoming is Librarian Resistance.

- Data: percentages/numbers listed here are our own, not our collections thru our consortium purchasing. ARL research environment is smaller than the audiences the media is writing about—no bestsellers, we don't do textbooks. Textbook publishers do need to come to market, it's a game-changer. Academics want multiple user rights and want to own the content. The ejournal market started slow 15 years ago and then exploded....the ebook market is expanding at a more vertical rate, due to the prevalence of mainstream technological devices. A digital book on a computer is not an ebook—it's a computer book. Only if the ebook can be put on a Nook, iPad, etc., will the audiences consider it to be useful, and thus embrace it. Research students so far: "don't want to use" because the content we get is still just a book on the computer. Very disappointing, but we are hopeful that our markets will see some rapid change soon.

- We have more than one ebook collection. Books 24 x 7, Safari & NetLibrary. Our policy is to support the content regardless of the device. We do not have OverDrive.

- We have ebooks for our online course users. Our use has been limited due to technical issues with loading the MARC records into our online catalog. We have several NetLibrary collections, which are being converted to the EBSCOHost platform. I hope that our students will make more use of them if they are on EBSCO. Also, I hope that EBSCO will give us better usage statistics. It was impossible to get usage statistics from NetLibrary.

- When students are aware that they can access ebooks, they seem to enjoy using them. They are easy access on and off campus through the library website and they are quick reference for those who wait to do research.

- We are still grappling with this issue. We don't feel (at this time) we want to use downloadable ebooks on devices but rather use the web as the platform, generally.

- We added Ebrary's education subject set last year and it's enormously popular with students and faculty. At this time we do not circulate ebooks. I am thinking about it, but honestly, no one is asking...

- Our students don't have a real appetite for books let alone ebooks. They are not really readers.

- Ebook purchases are still very much haphazard and in the hands of the librarians with "leftover" funds. This year we had the faculty indicate whether they wanted print or e. If they did not indicate which on their order we assumed they did not care which format. Only 2 out of 100 indicated print.

- Because ebooks at my library do not download at this time to a device that is easy on the eyes like Kindle and Barnes and Noble devices, I'm left with a PC which isn't as easy on the eyes, at least for reading text long-term. Most branches of our local public library system do have the ability to download onto personal devices and have become quite popular.

If/when my library offers downloading, it might make a difference to circ stats. In fact, if I remember correctly, when ebooks were first introduced about 15 years ago, they did not achieve popularity and the fad died. I think the main difference between now and then is the technology that has made them easier to read for longer periods of time. I like both the Kindle and the Nook, very easy on the eyes, but at this time I'm not ready to buy the same books I can check out from my libraries for free!
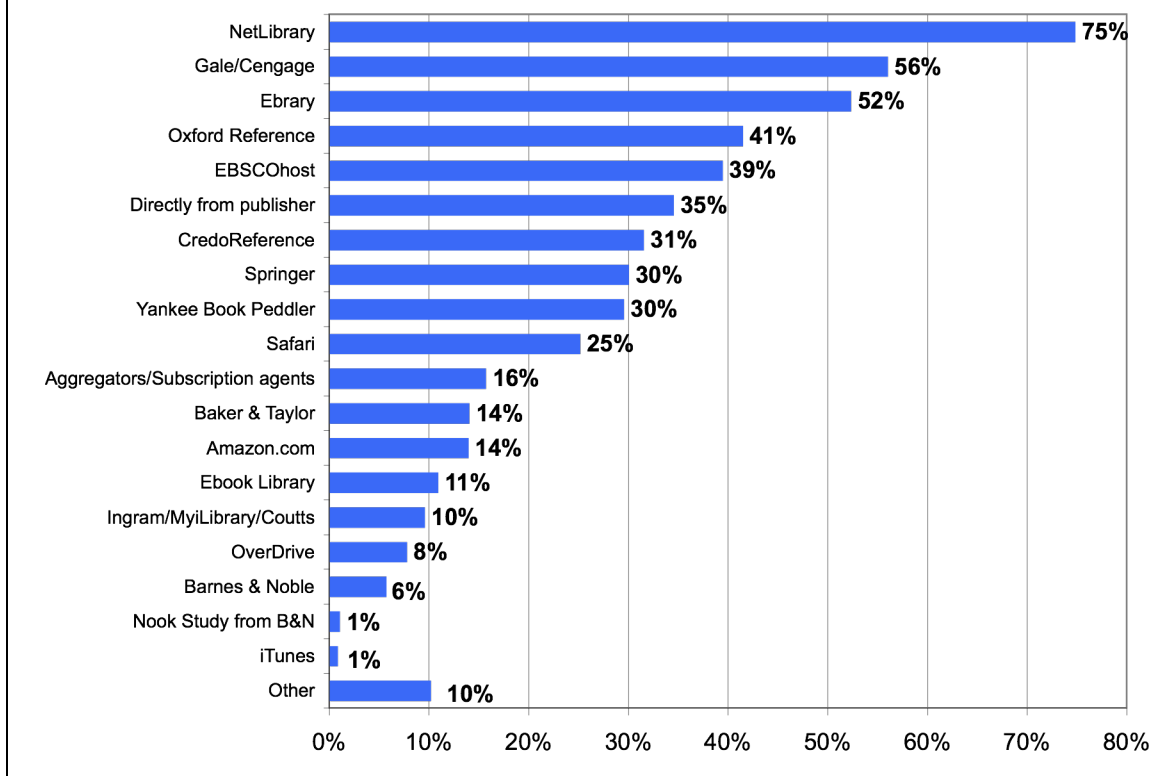
- Users love them.

5. LIBRARIES AND EBOOK VENDORS

Vendors Patronized

NetLibrary is the top vendor patronized by academic libraries for ebooks; 75% buy through NetLibrary, unchanged from last year. A somewhat distant second and third are Gale/Cengage at 56% and Ebrary (52%). A smaller percentage (35%, down from 42%) of academic libraries buy ebooks directly from the publisher. (For clarity, we only included 2011 survey data in Figure 44.)

Figure 44. Q40: *From which vendor(s) does your library purchase ebooks?—All academic libraries* (multiple responses permitted)

Vendor	Percentage
NetLibrary	75%
Gale/Cengage	56%
Ebrary	52%
Oxford Reference	41%
EBSCOhost	39%
Directly from publisher	35%
CredoReference	31%
Springer	30%
Yankee Book Peddler	30%
Safari	25%
Aggregators/Subscription agents	16%
Baker & Taylor	14%
Amazon.com	14%
Ebook Library	11%
Ingram/MyiLibrary/Coutts	10%
OverDrive	8%
Barnes & Noble	6%
Nook Study from B&N	1%
iTunes	1%
Other	10%

Where a library purchases an ebook varies by type of institution. Graduate/Professional level libraries appear to order from a broader assortment of sources than community colleges.

The top three ebook vendors utilized by graduate/professional level libraries are:

- Ebrary (72%)
- NetLibrary (69%)
- Gale/Cengage (53%)

The top three ebook vendors utilized by undergraduate level libraries are:

- NetLibrary (74%)
- Gale/Cengage (57%)

- Ebrary (55%)

The top three ebook vendors utilized by community college libraries are:

- NetLibrary (84%)
- Gale/Cengage (58%)
- EBSCOhost (37%)

***Table 39. Q40: From which vendor(s) does your library purchase ebooks?
—Academic libraries by type of institution and acquisition budget*** (multiple
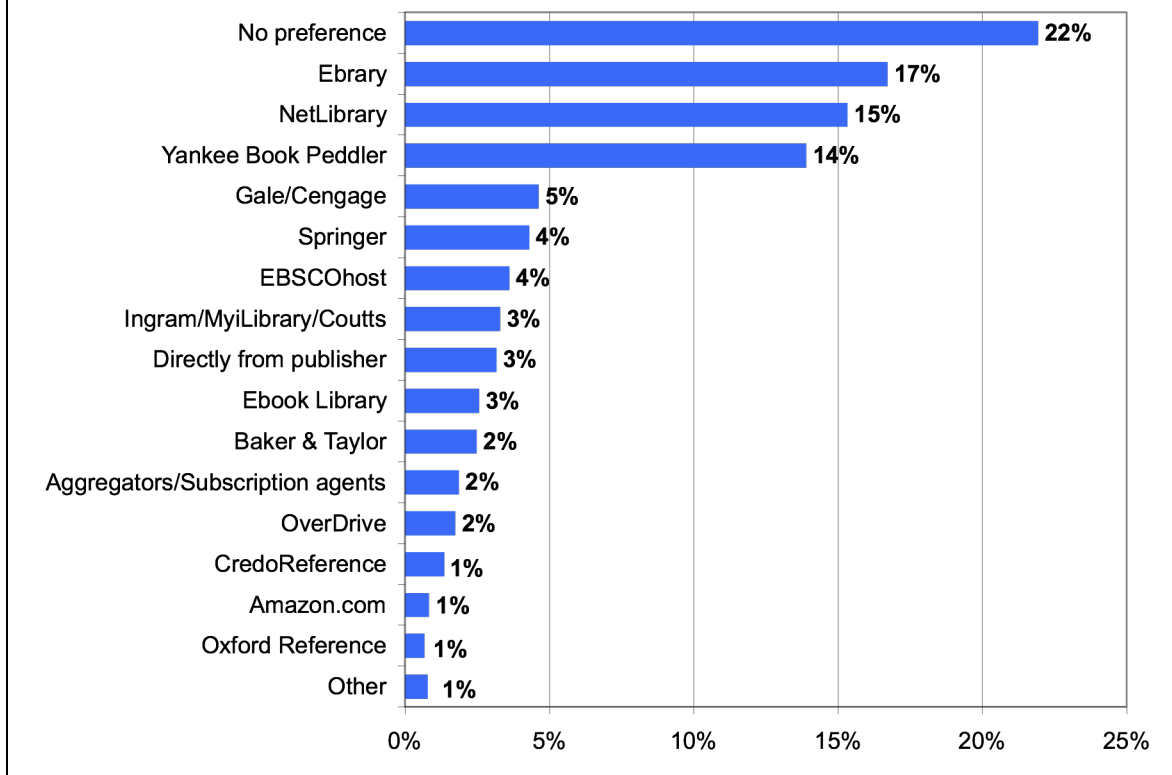responses permitted)

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
NetLibrary	69%	74%	84%	77%	72%	79%	77%	72%
Gale/Cengage	53%	57%	58%	58%	51%	48%	54%	66%
Ebrary	72%	55%	22%	48%	56%	27%	50%	74%
Oxford Reference	53%	46%	18%	39%	44%	21%	37%	64%
EBSCOhost	45%	36%	37%	41%	38%	27%	46%	40%
Directly from publisher	52%	31%	18%	33%	34%	19%	27%	53%
CredoReference	21%	37%	36%	30%	36%	36%	34%	29%
Springer	49%	29%	6%	31%	28%	9%	15%	63%
Yankee Book Peddler	48%	30%	4%	31%	24%	6%	21%	59%
Safari	37%	21%	16%	26%	20%	4%	23%	42%
Aggregators/ Subscription agents	21%	16%	7%	14%	16%	7%	11%	26%
Baker & Taylor	8%	15%	21%	17%	10%	12%	18%	10%
Amazon.com	20%	13%	7%	14%	11%	4%	15%	19%
Ebook Library	20%	8%	3%	8%	12%	1%	6%	21%
Ingram/MyiLibrary/ Coutts	20%	6%	1%	6%	12%	3%	4%	19%
OverDrive	8%	7%	9%	10%	4%	10%	6%	7%
Barnes & Noble	8%	5%	4%	8%	1%	1%	5%	9%
Nook Study from B&N	0%	2%	1%	1%	1%	3%	1%	0%
iTunes	1%	0%	1%	1%	1%	1%	1%	0%
Other	12%	8%	12%	10%	9%	7%	12%	9%
2010								
NetLibrary	73%	76%	79%	74%	77%	72%	78%	72%
Ebrary	61%	49%	36%	53%	51%	33%	48%	67%
Cengage (Gale)	46%	45%	55%	55%	42%	36%	52%	54%
Directly from publisher	54%	43%	14%	48%	35%	19%	33%	68%
Oxford Reference	42%	47%	24%	41%	41%	12%	46%	56%
CredoReference	24%	31%	21%	27%	33%	24%	37%	24%
EBSCO	27%	31%	17%	29%	27%	26%	23%	34%
Safari	37%	26%	12%	32%	21%	9%	17%	52%
Aggregators/ Subscription agents	33%	22%	14%	28%	22%	7%	19%	46%
Baker & Taylor	22%	17%	31%	26%	18%	14%	22%	30%
StatRef	27%	9%	10%	22%	11%	3%	8%	35%
Amazon.com	12%	20%	2%	16%	14%	5%	13%	24%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
Books@Ovid	20%	8%	5%	15%	11%	0%	5%	28%
MD Consult	24%	5%	2%	15%	9%	2%	4%	28%
MyiLibrary (Ingram)	16%	7%	7%	12%	9%	2%	2%	23%
AccessMedicine	16%	2%	5%	12%	6%	2%	5%	19%
OverDrive	2%	6%	10%	6%	5%	7%	5%	4%
R2Library	8%	2%	5%	7%	3%	2%	2%	10%
iTunes	2%	2%	0%	2%	2%	0%	2%	3%
Audible.com	1%	2%	0%	1%	2%	0%	1%	3%
Other	22%	19%	5%	15%	19%	17%	14%	20%

Preferred Vendors

When asked to select the one ebook vendor they would most prefer to use, Ebrary received the most significant response (17%, down slightly from 21% last year) followed by NetLibrary (15%, down from 18%). Twenty-two percent of academic libraries selected "no preference" (down from 25%).

Figure 45. Q41: Which is your <u>preferred</u> ebook vendor? —All academic libraries (only one response permitted)

Yankee Book Peddler received the majority of responses (25%) from graduate/professional level libraries. Ebrary topped the list for undergraduate institutions and NetLibrary edged out among the community college libraries.

***Table 40. Q41: Which is your preferred ebook vendor? —Academic libraries by type of institution and acquisition budget** (only one response permitted)*

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K–$999K	$1 Mil+
2011								
Ebrary	17%	22%	6%	12%	26%	13%	21%	16%
NetLibrary	7%	12%	33%	16%	14%	33%	16%	2%
Yankee Book Peddler	25%	13%	0%	15%	10%	1%	9%	29%
Gale/Cengage	0%	4%	12%	5%	4%	4%	5%	5%
Springer	4%	6%	1%	3%	7%	0%	4%	7%
EBSCOhost	1%	3%	7%	4%	4%	3%	5%	3%
Ingram/MyiLibrary/ Coutts	8%	2%	0%	2%	3%	0%	1%	8%
Directly from publisher	5%	2%	3%	4%	1%	3%	3%	3%
Ebook Library	3%	3%	1%	2%	2%	0%	3%	5%
Baker & Taylor	0%	2%	6%	3%	2%	4%	3%	0%
Aggregators/ Subscription agents	3%	2%	0%	1%	3%	1%	1%	2%
OverDrive	0%	2%	3%	2%	2%	3%	3%	0%
CredoReference	0%	2%	1%	1%	2%	4%	1%	0%
Amazon.com	1%	0%	1%	1%	1%	1%	0%	1%
Oxford Reference	0%	2%	0%	1%	0%	0%	1%	1%
Barnes & Noble	0%	0%	1%	1%	0%	1%	0%	0%
iTunes	0%	0%	1%	1%	0%	1%	0%	0%
Safari	0%	1%	0%	1%	0%	0%	0%	1%
Nook Study from B&N	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	1%	0%	1%	1%	0%	1%	1%
No preference	24%	21%	21%	25%	17%	24%	24%	14%
2010								
Ebrary	21%	19%	21%	19%	23%	22%	25%	15%
NetLibrary	11%	17%	29%	16%	21%	34%	21%	4%
Amazon.com	3%	4%	2%	3%	3%	3%	5%	1%
Cengage (Gale)	2%	1%	10%	3%	3%	5%	2%	3%
Baker & Taylor	3%	1%	5%	4%	1%	2%	1%	5%
Directly from publisher	4%	2%	0%	2%	3%	5%	1%	3%
Oxford Reference	2%	2%	2%	2%	3%	2%	1%	4%
Safari	1%	4%	0%	2%	3%	0%	4%	3%
EBSCO	1%	2%	2%	3%	0%	3%	1%	1%
Aggregators/ Subscription agents	2%	3%	0%	3%	0%	0%	1%	4%
CredoReference	0%	1%	0%	2%	0%	2%	1%	0%
MD Consult	2%	0%	0%	1%	1%	0%	0%	3%
MyiLibrary (Ingram)	1%	1%	0%	1%	1%	0%	0%	3%
OverDrive	1%	1%	2%	1%	1%	2%	1%	0%
R2Library	1%	0%	2%	2%	0%	0%	1%	0%
Audible.com	0%	1%	0%	0%	1%	2%	0%	0%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under-grad	Com-munity College	Public	Private	< $100K	$100K–$999K	$1 Mil+
StatRef	1%	0%	0%	0%	1%	0%	0%	1%
AccessMedicine	0%	0%	0%	0%	0%	0%	0%	0%
Books@Ovid	0%	0%	0%	0%	0%	0%	0%	0%
iTunes	0%	0%	0%	0%	0%	0%	0%	0%
Other	14%	12%	5%	11%	11%	7%	9%	17%
No preference	29%	28%	19%	27%	23%	10%	25%	35%

Important Attributes

The most vitally important attribute of ebook vendors for academic libraries, this survey and last year's, is "ease of use for library users"—this was either very important or important for almost every respondent to this survey (99%). "Free MARC records for the library OPAC to support discovery" was number two at 82%, and "easy to use administrative portal" was selected by 77%. "Multiple device options offered" increased from 64% to 74% of all respondents. The one attribute that dropped substantially from last year was "print-on-demand capability," which declined from 74% to 63% of respondents.

Figure 46. Q39: Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) —All academic libraries
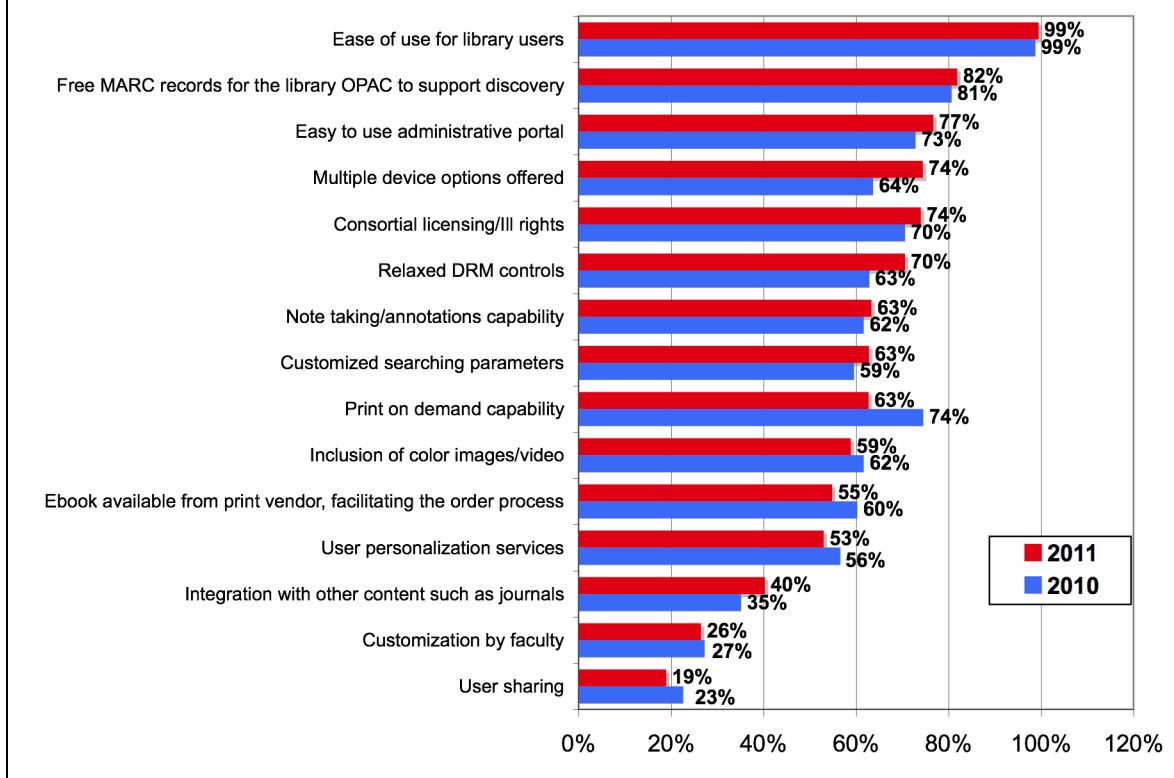
"Ease of use for library users" is the number one choice for all three types of academic libraries. "Multiple device options offered" is of greater importance to graduate/professional institution libraries. "Customized searching parameters" holds more importance in community college libraries.

Table 41. Q39: Please rate the importance of the following attributes when considering an ebook (Very Important/Important) —Academic libraries by type of institution and acquisition budget

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under-grad*	*Com-munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
2011								
Ease of use for library users	100%	99%	99%	99%	99%	100%	98%	100%
Free MARC records for the library OPAC to support discovery	78%	82%	87%	84%	81%	84%	83%	84%
Easy to use administrative portal	75%	78%	76%	77%	76%	78%	79%	73%
Multiple device options offered	81%	73%	69%	76%	69%	66%	73%	80%
Consortial licensing/ILL rights	77%	75%	68%	76%	68%	67%	74%	80%
Relaxed DRM controls	74%	72%	63%	75%	64%	58%	68%	85%
Note taking/annotations capability	66%	65%	58%	64%	62%	56%	64%	67%
Customized searching parameters	56%	59%	77%	68%	57%	68%	65%	55%
Print on demand capability	58%	65%	65%	65%	59%	67%	64%	59%
Inclusion of color images/video	63%	58%	55%	65%	52%	41%	62%	71%
Ebook available from print vendor, facilitating the order process	61%	54%	48%	59%	48%	45%	49%	71%
User personalization services	59%	48%	54%	51%	56%	48%	57%	51%
Integration with other content such as journals	42%	36%	45%	43%	35%	42%	41%	38%
Customization by faculty	30%	23%	28%	32%	18%	22%	27%	30%
User sharing	18%	17%	23%	23%	11%	19%	18%	21%
2010								
Ease of use for library users	97%	100%	100%	100%	97%	98%	100%	97%
Multiple device options offered	59%	66%	69%	63%	64%	67%	67%	61%
Easy to use administrative portal	68%	75%	83%	72%	73%	81%	79%	64%
Free MARC records for the library OPAC to support discovery	76%	83%	89%	82%	78%	73%	89%	76%
Consortial licensing (ILL rights)	74%	73%	57%	71%	69%	56%	72%	79%
Customized searching parameters	55%	64%	61%	62%	55%	73%	56%	57%
User personalization	57%	60%	58%	58%	54%	60%	60%	51%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	*Under- grad*	*Com- munity College*	*Public*	*Private*	*< $100K*	*$100K– $999K*	*$1 Mil+*
services								
Ebook available from print vendor, facilitating the order process	60%	58%	61%	68%	49%	57%	51%	75%
Notetaking/annotation capability	58%	67%	57%	62%	60%	63%	64%	58%
Print-on-demand capability	72%	79%	74%	73%	76%	81%	76%	70%
Integration with other content, such as journals	32%	37%	36%	39%	29%	40%	37%	33%
User sharing	19%	26%	22%	26%	18%	15%	32%	19%
Relaxed DRM ciontrols	68%	60%	57%	63%	62%	48%	66%	67%
Inclusion of color images	67%	61%	59%	61%	62%	52%	59%	71%
Customization by faculty	26%	28%	36%	31%	21%	26%	27%	28%

General Conclusions

Ebrary and NetLibrary are the most-preferred vendors of ebooks, but as the verbatim comments throughout this report have indicated, not everyone is entirely happy with NetLibrary—or even Ebrary. (The recent acquisition of NetLibrary by EBSCO is a source of either some trepidation or some hope—depending on whom you ask.)

"Ease of use for library users," "free MARC records to support discovery" and "easy to use administrative portal" are the most important ebook vendor attributes academic buyers are looking for. .

Publishers and vendors should pay particular attention to these attributes, and read them in the context of the verbatim comments provided at the end of this chapter. The demand for electronic content may be becoming the new normal, but access for libraries is still restricted by cumbersome interfaces, limits on multiple access, and discovery issues. These can act as serious deterrents to the use of ebook collections, potentially short-circuiting this still developing technology.

In Their Own Words...

"What do you need from publishers/vendors to make incorporating ebooks easier?" We present a selection of those verbatim comments here (lightly edited). The vast majority of the write-in comments wanted DRM to go away, standardization of formats, and compatibility with multiple devices.

- Open source access.

- Complete MARC records, no DRM issues.

- Uniformity in format so they can be downloaded and read on all readers.

- The right to actually own the content, without restrictions or limitations.

- Quality cataloging records for discovery including toc, summary notes and reviews, ability to read easily on variety of platforms, ability to read offline.

- Make all formats compatible between all devices, stop this proprietary format nonsense.

- Less cumbersome interfaces.

- Annotation capability; interface supporting the way people actually read; easy, transparent download process; minimal DRM.

- DRM free, device neutral, open source format, some type of perpetual access, participation in SERU.

- Cheaper prices for institutions, promotional items such as posters, bookmarks, etc.

- One login for the download of a book; one format for ebook.

- ILL options built in; images need to be included not wiped out due to copyright restrictions; better cross-platform capability; simultaneous access and sharing; annotation and page turning capability.

- Concurrent release of the electronic version with the print version AND advertising of all versions in the same place (website, mailing, etc)... I many times PREFER to buy the ebook but frequently must hold my purchase for 3-9 months to find out whether it will be available in an ebook version.

- STANDARDS!!!!

- Better Interlibrary Loan policies for ebooks.

- None of our ebooks can be downloaded. We need our vendors to make scholarly books downloadable.

- Reasonable prices for ebooks.

- 1-Institutional licensing options for libraries. 2-Easy bib loading into ILS systems. 3-Marketing so librarians know what is available and at what cost.

- Better integration with third party MARC record providers, like Serials Solutions. Higher quality MARC record metadata.

- The ideal thing would be for publishers to offer multiple access points: ebooks available to read from regular computers, but also downloadable to devices like Kindle, Nook, iPad, Smartphone, or whatever mobile device is popular. Flexibility is the key.

- I am opposed to libraries giving up all rights to fair use, first sale, preservation, and censorship-proofing not to mention having some assets to show for our expenditures. When we license, we lose all of that. And we're poised to repeat the problems that came with the Big Deal—artificial funding for publishing things nobody needs. It's bad for the entire information ecology.

- Less DRM and better support for e-reading and mobile devices

- An end to the nonsense

- Allow books to be downloaded onto reading devices (our vendor does not allow this).

- Do not restrict access for libraries (e.g., only allowing a fixed number of downloads/views).

- Help us work it into our workflow, and also, we need to have a very diverse availability of publishers and titles available in e-book form. If it's only a small subset of titles available as e-books, it can't really replace the printed book. Also, we need the whole process to be very simple. I think right now everybody wants a Nook, but maybe as tablets take off more people will want to read on that, either way, downloading the whole book and reading offline is preferable to an online experience.

- We are very pleased with the vendor model of patron-driven acquisitions. Allowing us to add to our catalog titles that patrons may or may not select is very satisfying.

- Offering textbooks from major publishers at universities in all formats....not just a few... make all formats available.

- More sharing of titles within a consortium and flexible license agreement.

- Standardization; a la carte licensing; have great hopes for new NISO committee on e-books.

- Managing MARC records (addition and deletion); seamless ordering; less complicated start-up process.

- MUPO licenses for textbooks, simultaneous ebook release, PDF format.

- Downloadable content for our core titles—all of our titles are currently provided online only, and cannot be downloaded to a device for offline browsing.

- No concurrent user limits, and no limited check outs. looked into EBL, but even when you buy the book, there is still limited check outs. It's an e-book, not a paper book, it shouldn't be treated the same.

- Reasonable prices and access. Some ebooks I would like to have access to as they are of "historical" or "author" significance. I purchase those in print. Others are not items I would keep for over 5 years. Publishers/vendor make available items in groups and many say they will only be available to us for 3 years (as an example) and they can only be used one person at a time. For the price, it would cost me more to purchase an ebook than to have one hard copy that can be return and used again more quickly. Basically it is not efficient or cost effective. With smaller and smaller budgets, I purchase less, especially things that we can get physically through our consortium. Yes, publishers have told everyone how great it is to have books on devices but we are finding that those who can afford to purchase their own do so and those who cannot are at a disadvantage, using all libraries to access what ever form they can get it in.

- Loanable using the OverDrive model. Multiple formats: ePub, kindle, pdf, mobi, etc.

- Downloadable ePub/mobi format for ereaders. Better interfaces for viewing ebooks and extensive annotation capability. Easier downloading—I understand their desire for DRM, but it *has* to get better or gotten rid of altogether. Simultaneous access.

- Better Digital Rights Management practices and better selections among publishers. I hate that I have to decide if I am going to be locked in to one platform with one publisher (Netlibrary/EBSCO) who only offers a certain selection and interface vs. another publisher who may offer better selection (Ebrary), but not such a great interface. I don't want the students to have to deal with too many interfaces, so why can't you just provide us with the content, and stop dictating how to display it. Give us a single user interface for eBooks and just be the distributor.

- Increase the audio titles and options for academic collections.

- More liberal printing policies. A business model, like Safari Tech Books Online, which allows the library staff to switch out individual titles in its bookshelf' to keep the e-book collection vital and up to date with ever changing needs of students.

- More features like the apps now currently available, i.e. page turning.

- More stable pricing models and the idea that library budgets are not unlimited.

- More interactivity—highlighting, annotating, etc., and format options. Some using want to choose between say a PDF or an ePub. Price—list price should be EQUAL to print and availability pervasive (i.e., not just on one platform or as part of a package subscription—the latter is not a model

we can afford to sustain; we prefer à la carte and want availability on at least two platforms.

- Our library has received multiple requests for capabilities to download ebooks to an ereader (Kindle, etc.) and Ebrary does not have that capability yet. Ebrary has indicated we should have the capability to download to ereaders within the next 6 months.

- Seamless integration with OCLC—better discovery tools.

- Besides mandatory Library Instruction, ways to reach out to resistant faculty and other ways to promote online usage among students.

- Availability of newer titles. Multiple users. Download to own device. All would be good. Our NetLibrary subscription doesn't allow for most of the preceding.

- Patron Driven Acquisitions would be helpful with caps for purchasing.

- Vendor-provided ebook readers need to look better and be easier to manipulate. Commercial ereaders are more intuitive and adaptable than current ebook readers from library vendors. It is difficult for knowledgeable librarians, let alone unfamiliar students, to figure out how to turn the pages and change font sizes within current vendor-provided ereaders. Our vendors need to at least match commercial ereaders in order to encourage student and faculty usage.

- STANDARD BOOK INTERFACES.

- MARC records, promotional materials.

- We need to figure out something smarter than MARC records and reliance on the OPAC for discoverability. We are waiting with bated breath for our A-Z eresource list provider to index ebooks.

APPENDIX

The Survey Methodology

The present report is one-third of an overall survey that included school and public libraries, in addition to academic libraries.

The ebook survey was developed by *Library Journal* and *School Library Journal* to measure current and projected ebook availability in libraries, user preferences in terms of access and subjects, and library purchasing terms and influences.

An e-mail invitation was sent to 38,300 *Library Journal* and *School Library Journal* newsletters subscribers on May 6, 2011, with follow-up reminders to non-responders on June 24 and July 11. The survey link was advertised in *Library Journal* and *School Library Journal* newsletters. A drawing for two Nook Colors and four complimentary seats at the Virtual Ebook Summit were offered as incentive to reply.

The survey closed July 31, 2011 with 488 academic libraries responding. The survey was developed, programmed, hosted and tabulated in-house. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. academic libraries only. The academic data in total was weighted to be congruent with the breakdown of 2 year, 4 year undergraduate and graduate level libraries in last year's survey as well as to better represent the overall distribution nationally.

The 2010 data used for comparison is based on 364 U.S. academic libraries responding in August 2010.

2011 Academic Library Ebook Survey

1. What is the zip code/postal code at your library's location?
_____

2. Which of the following comes closest to your job title?
☐ Library director/Ass't library director
☐ Library manager
☐ Head librarian/Department head
☐ Reference/Information Services librarian
☐ Electronic resources librarian
☐ Technical Services librarian
☐ Collection development/Materials selection librarian
☐ Acquisitions librarian
☐ Serials librarian
☐ Cataloging librarian
☐ Systems librarian
☐ Circulation librarian
☐ Library administrator
☐ Library aide
☐ Other (please specify)_____

3. Which of the following best describes your library?
☐ Community college library
☐ Undergraduate 4-year college/university library
☐ Graduate/Professional academic library: Humanities
☐ Graduate/Professional academic library: Science, Medicine, Technology
☐ Graduate/Professional academic library: Social Science/Law
☐ Other _____

4. Is your institution public or private?
☐ Public
☐ Private

5. What is the total number of volumes in all subject areas in your library?
☐ Under 10,000 volumes
☐ 10,000 to 24,999 volumes
☐ 25,000 to 49,999 volumes
☐ 50,000 to 99,999 volumes
☐ 100,000 to 249,999 volumes
☐ 250,000 to 499,999 volumes
☐ 500,000 to 999,999 volumes
☐ 1 to 2.9 million volumes
☐ 3 million volumes or more

6. What was your library's total acquisition budget (print & digital) for this academic year? Please answer in U.S. dollars.

☐ Under $50,000   ☐ $500,000 - $999,999
☐ $50,000 - $99,999   ☐ $1 - $2.49 million
☐ $100,000 - $249,999   ☐ $2.5 - $4.9 million
☐ $250,000 - $499,999   ☐ $5 million or more

When we ask about 'ebooks' in this survey, we are referring to digital books, electronic monographs & textbooks only. Please do not include reference databases, electronic serials, or academic papers.

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

☐ None (If None, skip to Q43)
☐ Under 250
☐ 250 to 499
☐ 500 to 999
☐ 1,000 to 4,999
☐ 5,000 to 9,999
☐ 10,000 to 24,999
☐ 25,000 to 49,999
☐ 50,000 to 99,999
☐ 100,000 or more **(please specify)_____**

8. Has your library experienced an increase in requests for ebooks since this time last year?

☐ Yes, dramatic increase
☐ Yes, slight increase
☐ No, request level is unchanged
☐ No, we receive no requests for ebooks

9. Which categories of ebooks does your library currently offer users? Check all that apply.

☐ Scholarly monographs
☐ Textbooks
☐ Reference (non-circulating)
☐ Bestsellers
☐ Classic literature
☐ General adult fiction (including backlist)
☐ General adult nonfiction (including backlist)
☐ Other (specify)_____

10. For which disciplines are you most likely to offer ebooks? (Check all that apply)

☐ Business
☐ Humanities
☐ Social Sciences
☐ Law
☐ Medicine
☐ Science
☐ Technology
☐ Other (specify)_____
☐ All disciplines

11. In which discipline(s) do you project the greatest growth in ebook usage in the next 2 to 3 years?
☐ Business
☐ Humanities
☐ Social Sciences
☐ Law
☐ Medicine
☐ Science
☐ Technology
☐ All disciplines
☐ Other (specify)_____

12. How does your library market the availability of ebooks in your library? Check all that apply.
☐ General online catalog/OPAC
☐ Digital collection link on website
☐ Ads for ebooks posted in library/Bookmarks/Fliers
☐ Library newsletter
☐ Social networking (e.g., Facebook, Twitter, etc.)
☐ Word of mouth
☐ Other (specify)_____
☐ We do not market ebooks specifically

13. What ebook usage license model(s) are currently employed at your library?
☐ Single ebook use at a time
☐ Multiple ebook usage, but not unlimited. Specify #_____
☐ Unlimited access/simultaneous use
☐ Other (specify)_____
☐ Don't know

14. What is the circulation interval for ebooks at your library? **Check all that apply**
☐ Ebooks do not circulate – for in-library use only
☐ Less than 7 days
☐ 7 days
☐ 14 days
☐ 21 days
☐ 28 days
☐ User specified
☐ Other _____

15. Do you allow students/faculty to place holds on downloadable ebooks?
☐ Yes
☐ No
☐ Sometimes

16. (If yes) Have you ever purchased extra digital copies to fulfill an ebook hold?
☐ Yes
☐ No

17. What was your ebook circulation in the last two years?
Academic year 2009-2010 circulation _____
Academic year 2010-2011 circulation _____

18. Compared to this academic year, do you expect next year's circulation of ebook titles will increase, stay the same or decrease?
☐ Increase, by what percentage? _____%
☐ Stay the same
☐ Decrease, by what percentage? _____%

19. In which format do users generally prefer ebooks? Check all that apply
☐ PDF
☐ Full-text HTML
☐ ePub
☐ Optimized for dedicated ebook device (e.g., Kindle, Sony Reader)
☐ Optimized for other mobile device (e.g., iPhone, Smartphone)
☐ Other (specify)_____
☐ Don't know

20. What device(s) do your library users most often use to read circulating ebooks? Check all that apply.
☐ Personal Laptop/Computer/Netbook
☐ Library computer
☐ Dedicated ebook reader (e.g., Nook, Sony Reader, Kindle)
☐ Other portable device (e.g., iPad, smartphone)
☐ Other (specify)_____
☐ Don't know

21. Are users able to download ebooks to their own devices inside your library?
☐ Yes, we have a dedicated download station
☐ Yes, on our internet computers
☐ No, downloads must be made offsite

22. Has your library offered student training sessions on how to download content to ereading devices?
☐ Yes
☐ No

23. Do you circulate preloaded ereading devices?
☐ Yes, for in-library use only
☐ Yes, for take home use
☐ Not currently, but considering
☐ No

24. (If yes) How many preloaded ereading devices does your library maintain? ___

25. If yes, which preloaded ereading devices are you circulating?
☐ Kindle
☐ Sony Reader
☐ Nook
☐ iPad
☐ Other(specify) _____

26. What hinders students/faculty from using your library's ebook content? Check all that apply.
☐ Difficult to find/discover
☐ Difficult to read onscreen/online
☐ Difficult to annotate
☐ Digital rights management issues
☐ Not available for preferred devices
☐ Long wait times for ebooks
☐ Limited access to e-reading devices
☐ Users prefer print
☐ On demand titles not available for libraries
☐ Lack of training
☐ Faculty resistance
☐ Complex downloading process
☐ Unaware of ebook availability
☐ Ebook titles not available concurrent with print release
☐ Other (specify)_____

27. How often do your users report technical problems when downloading an ebook?
☐ Often
☐ Sometimes
☐ Rarely
☐ Never

28. What do you need from publishers/vendors to make incorporating ebooks easier?
_____

29. Is your library part of a consortium license program for its ebook collection?
☐ Yes
☐ We used to be, but no longer. Why did you leave the consortium?
_____
☐ No, but plan to in the future
☐ No
☐ Don't know

30. [if yes] Does your library also buy ebooks independently?
☐ Yes
☐ No

31. Are you involved in the recommendation/purchasing process of ebooks for your library?
☐ Yes
☐ No (If No, skip to Q42)

32. What type of purchasing terms does your library typically use when acquiring ebooks? Check all that apply.
☐ Purchase with perpetual access
☐ Purchase with perpetual access through self-hosting
☐ Subscription
☐ Pay-per-use
☐ License with set # circs model (like Harper Collins 26 circs model)
☐ Concurrent use/access
☐ Bundled with other content
☐ User-driven acquisition
☐ Upfront purchase with maintenance fee
☐ Upfront purchase with update fee
☐ Other (specify)_____

33. Approximately how much would you estimate your library spent on ebooks during the current academic year?
☐ $0 – all ebooks provided by state/consortium
☐ Less than $1,000 (specify)_____
☐ $1,000 - $4,999
☐ $5,000 – $9,999
☐ $10,000 - $24,999
☐ $25,000 - $49,999
☐ $50,000 or more (specify) $_____
☐ Don't know

34. How are ebooks represented in your library's acquisition budget? Check all that apply.
☐ Included in electronic resources/digital content budget
☐ Included in print resources budget
☐ Separate line/Budget for ebooks only
☐ Other (specify)_____

35. Approximately what percentage of your library's acquisitions budget did ebooks represent last year, do they currently represent and what percentage do you predict ebooks will represent in 5 years?

	0%	1% - 2%	3% - 5%	6% - 10%	11% - 25%	More than 25%
Last year	☐	☐	☐	☐	☐	☐
Currently	☐	☐	☐	☐	☐	☐
In 5 years	☐	☐	☐	☐	☐	☐

36. What factors influence your decision to purchase an ebook for your library? (Check all that apply)
☐ Projected usage/high demand titles
☐ Relaxed digital rights management
☐ Availability as a single title purchase
☐ Inclusion in bundles with attractive pricing
☐ Content not readily available elsewhere
☐ Student request
☐ Book reviews
☐ Faculty request
☐ Limited shelf space
☐ Required use of titles in the curriculum
☐ Ease of purchase/Integrated purchase with print book
☐ Licensing terms/Lending caps (e.g., Harper Collins 26 circs model)
☐ Less costly than print editions
☐ Other (Please specify)_____
☐ Special grant

37. What do you feel would be a fair and realistic model for licensing ebooks? Check all that apply.
☐ Lending cap model (e.g., 26 circs HarperCollins model)
☐ Maximum access (multiple users allowed simultaneous access)
☐ Opportunity to license for varying # of circulations
☐ Unlimited circs using one reader/one book model
☐ 1 year interval
☐ 2 year interval
☐ Patron driven acquisition model (Multiple titles available, purchase based on holds)
☐ Other, specify_____

38. How do you generally find and learn about ebooks? (Check all that apply)
☐ Requests from faculty
☐ Requests from students/users
☐ Library colleagues/subject specialists
☐ Professional level journals (e.g., Library Journal)
☐ Consumer media
☐ Blogs
☐ Inclusion in content packages/bundles
☐ Webcasts/webinars
☐ Vendor websites
☐ Publishers' marketing materials (e.g., catalog, ad, etc.)
☐ Conferences/Tradeshows
☐ Other (Specify)_____

39. Please rate the importance of the following attributes when considering an ebook vendor?

	Very Important	Important	Somewhat Important	Not Important	No Opinion
Ease of use by library users	☐	☐	☐	☐	☐
User personalization services (i.e., saved preferences)	☐	☐	☐	☐	☐
Note taking/annotations capability	☐	☐	☐	☐	☐
Easy to use administrative portal	☐	☐	☐	☐	☐
Free MARC records for the library OPAC to support discovery	☐	☐	☐	☐	☐
Print on demand capability	☐	☐	☐	☐	☐
Customized searching parameters	☐	☐	☐	☐	☐
Multiple device options offered (iPhone, Sony Reader, smartphone, etc.)	☐	☐	☐	☐	☐
Integration with other content, such as journals	☐	☐	☐	☐	☐
User sharing (e.g., social bookmarks, comments, voting)	☐	☐	☐	☐	☐
Consortial licensing/Interlibrary loan rights	☐	☐	☐	☐	☐
Relaxed DRM controls	☐	☐	☐	☐	☐
Inclusion of color images/video	☐	☐	☐	☐	☐
Customization by faculty	☐	☐	☐	☐	☐
Ebook available from print vendor, facilitating the order process	☐	☐	☐	☐	☐

40. From which vendor(s) does your library purchase ebooks? (Check all that apply)

41. Which is your preferred ebook vendor?

	Q40. ebook vendor(s) you purchase from	Q41. One Preferred ebook vendor
Amazon.com	☐	☐
Baker & Taylor	☐	☐
Barnes & Noble	☐	☐
CredoReference	☐	☐
Ebrary	☐	☐
Ebook Library	☐	☐
EBSCOhost	☐	☐
Gale/Cengage	☐	☐
Ingram/MyiLibrary/Coutt's	☐	☐
iTunes	☐	☐
NetLibrary	☐	☐
Nook Study from B&N	☐	☐
OverDrive	☐	☐
Oxford Reference	☐	☐
Safari	☐	☐
Springer	☐	☐
Yankee Book Peddler	☐	☐
Directly from publisher	☐	☐
Aggregators/Subscription agents	☐	☐
Other (Specify)_____	☐	☐
No Preference		☐

42. If you have any comments about ebooks in your library, please write them below.

(after answering, please skip to Question 45)

FOR THOSE WHO DO NOT CURRENTLY OFFER EBOOKS, FUTURE PLANS QUESTIONS

43. Why doesn't your library offer ebooks?
☐ No money for ebooks
☐ Lack of ereading devices
☐ Lack of technical support
☐ Don't understand logistics of ebooks
☐ No demand for them from users
☐ Waiting to see what the best platform will be
☐ Other (specify)_____

44. What are your library's plans for ebook purchases in the next two years?
☐ We will definitely purchase ebooks to add to our collection
☐ We may purchase ebooks but it is not a priority
☐ We will definitely NOT purchase ebooks to add to our collection
☐ Other (specify)_____

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