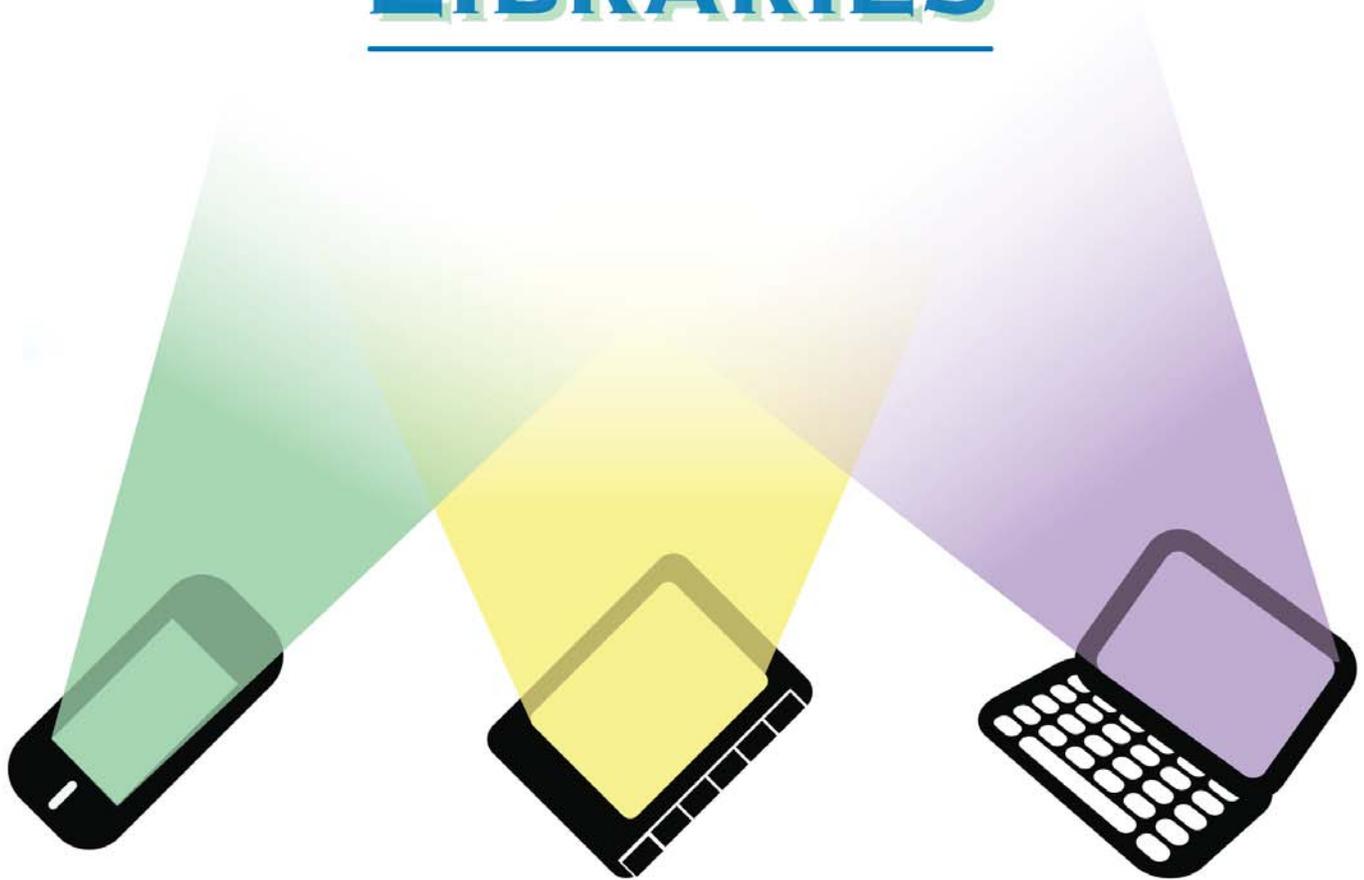


**2012**

**EBOOK USAGE**  
**IN U.S. ACADEMIC**  
**LIBRARIES**



**THIRD ANNUAL SURVEY**

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**Survey of Ebook Usage in U.S. Academic Libraries**

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## EXECUTIVE SUMMARY

Academic libraries, those that serve colleges, universities, and other institutes of higher learning, have two essential mandates: to serve the student body, which requires comprehensive research materials to complete class papers, dissertations, and other projects, and to serve the faculty, who are also heavily immersed in their own primary research projects, many of which (they hope) end up published in the professional academic journals the library may carry. For both groups, an essential part of any research project is a comprehensive literature review, or identification of what prior research has been done on a given topic. For students, their academic lives and subsequent careers are shaped by the work they do in college, and for faculty (and the graduate students who work with/for them), professional careers are made or broken by these research projects.

Access to research materials—in all their myriad forms—is absolutely essential for all. Meanwhile, distance learning programs have made remote access to library materials a necessity, thus further driving the demand for electronic media.

Within academic libraries, “ebooks” is a fairly nebulous concept, unlike the generally distinct meaning it has in, say, public libraries, where an “ebook” can be essentially defined as an electronic version of a book you would once have been able to find in print at your local Barnes & Noble. In academia, however, ebooks can have that same definition, but the term can also refer to reference books, electronic reference materials that may not even resemble a book as we know it,<sup>1</sup> academic journals, scholarly monographs, etextbooks, even long documents available solely as Web pages.

### Déjà Vu All Over Again

Since academic libraries were largely ahead of the curve technologically to begin with, there are not many dramatic changes from last year to this year, or even from 2010 to this year. But, for this market especially, the goal of these surveys is to find out where ebook publishers and vendors can do a better job helping libraries serve their users who are increasingly demanding ebook content, and there is more than enough food for thought herein. The ebook market continues to churn and evolve—or perhaps *devolve*, as some librarians might be tempted to say—and academic libraries are often on the bleeding edge of these changes.

There has scarcely been a more contentious relationship between book publishers and libraries when it comes to ebooks. This battle is especially heated in the public library space, but fears of piracy have endangered the generally amicable relationship book publishers have long had with libraries—and in many cases are interfering with libraries’ ability to serve their users. Our survey this year found

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<sup>1</sup> It has been estimated that if Wikipedia—which is often used, with care, in academia—were to be printed, it would actually be the size of a entire library ([http://en.wikipedia.org/wiki/File:Size\\_of\\_English\\_Wikipedia.svg](http://en.wikipedia.org/wiki/File:Size_of_English_Wikipedia.svg)). Of course, this hasn’t stopped people from attempting to produce giant print editions of it ([http://www.labnol.org/internet/wikipedia-printed-book/9136/.](http://www.labnol.org/internet/wikipedia-printed-book/9136/))

continued increases in demand from library users, as well as increased challenges for libraries to provide this content—and not all of them technological.

## More Ebooks Offered

Academic libraries were early adopters of ebooks—we found that the 339 U.S. academic libraries we surveyed this year have been offering ebooks for, on average, 5.2 years (i.e., since about 2007), with 19% saying they have carried ebooks for more than eight years (circa 2004).

As a result, ebook adoption has plateaued in academic libraries, with 95% currently carrying ebooks. This has remained essentially unchanged in the last three years. Changes have occurred within the academic ebook marketplace in the last year, however, which are reflected deeper in the survey.

The number of institutions adopting ebooks in general may be flat, but the number of ebooks offered continues to rise. The overall percentage hike in number of ebooks from last year to this was 41%.

<b>Average number of ebooks offered in...</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Graduate/Professional libraries	37,500	97,500	138,800
Undergraduate libraries	31,000	60,600	80,700
Community College/2-year libraries	21,500	25,200	32,400

Of the very few academic libraries that do not carry ebooks, “no money for ebooks” and “waiting to see what the best platform will be” are the top two factors. Still, the vast majority of this tiny minority admit that they will be adding ebooks in the next couple of years, at the latest. Among academic libraries in general, 69% have seen an increase in demand for ebooks.

The lead story in this market is all about access; in the 2010 and 2011 surveys, the top driver of ebook acquisition was “projected usage.” In 2012, the top influencing factors are “24/7 access”—selected by 74% of respondents—and “supports distance learners,” cited by 72%. “[Allows] multiple users at one time” is third at 70%.

“We would like to purchase more ebooks, but the number of options and choices available means that we have to devote too much of our very limited staff time to the decision-making process.”

## Circulation Trends

Ebook usage/circulation for the 2010–2011 academic year, on average, was 24,700, up considerably from the reported ebook circulation figure of 6,849 in 2009–2010. There was a major surge of undergraduate ebook circulation. Community colleges are still lagging behind other types of post-secondary schools.

<i>Mean ebooks circulation/usage...</i>	<i>2009–2010 school year</i>	<i>2010–2011 school year</i>
Graduate/Professional libraries	16,200	35,881
Undergraduate libraries	4,800	27,550
Community College/2-year libraries	3,200	3,873

Two-thirds of respondents expect ebook circulation to increase in the next year. Overall, the anticipated increase in circulation expected by libraries is not terribly dramatic, actually declining slightly from +17% last year to +15% this year.

“Use slowed last year, we don’t have a full picture of use this year. Prices too high with few if any discounts.”

## Ebook Spending Still Up

Academic spending on ebooks, as befits the “plateau” effect remarked upon earlier, is focused on new releases and updates to reference titles and etextbooks. The average amount spent on ebooks by respondents during the 2011–2012 academic year was \$67,400 (median \$16,600). Last year, academic libraries spent on average \$65,000 (median \$17,500). If projected over the library universe (and accounting for libraries not offering ebooks), academic libraries nationwide spent \$293 million on ebooks in the 2011–2012 school year, up from \$249 million in the previous year.

<i>Average amount spent on ebooks...</i>	<i>2010–2011 academic year</i>	<i>2011–2012 academic year</i>
Graduate/Professional libraries	\$142,272 <sup>2</sup>	\$99,900
Undergraduate libraries	\$36,356	\$42,600
Community College/2 year libraries	\$14,123	\$15,600

Currently, ebooks represent an average of 9.6% of academic libraries’ total acquisitions budgets, while last year they represented 7.5% of the total acquisitions budget. Community colleges (8.4%) dedicate the highest percentage of acquisition budgets toward ebooks.

On average, institutions that offer ebooks predict that ebooks will represent 19.5% of their acquisition budgets by 2017. About one-fourth of respondents speculate that ebooks will account for greater than 25% of their acquisition budgets in 2017. Still, five-year projections for ebook spending have tempered slightly from the past two reports.

<sup>2</sup> This is a disproportionately high number likely due to outliers; median spending was \$37,500.

## Ebook Purchasing Terms

When libraries purchase ebooks, more often than not (83% of all respondents) they purchase “perpetual access.” The second most popular option is “subscription” (71%).

“User-driven acquisition” is a growing option for many libraries, up from 16% two years ago to 31% in 2012. The primary advantage, for three-fourths of libraries that have adopted user-driven acquisition, is that it helps focus acquisition precisely on student/faculty needs. Other reasons cited include the allowance for more choice at a reasonable cost and better budget management.

Other purchasing terms are declining slightly.

“More publishers need to figure out their models and pick a standard. Competing formats are not helping anyone. HarperCollins model of x number of uses is unacceptable and unusable. Patron-driven acquisition has provided the best model for our patrons, and I hope they continue to improve.”

The percentage of academic libraries belonging to resource-sharing consortia is essentially unchanged from the last survey at just about six out of ten academic libraries. However, more than 80% of those that are part of a consortium also buy books independently.

## Ebook Subjects and Categories

By far the largest categories of ebooks carried by academic libraries are general non-circulating reference materials and scholarly monographs. Interestingly, etextbooks continue to lag in the fifth position (30%) in the current acquisitions race. They lag well behind reference books (92%), scholarly monographs (91%), classic literature (44%) and even general nonfiction (32%). We suspect that academic acquisitions librarians may be taking a wait and see attitude, waiting to gauge the trajectory and rate of etext adoption by their faculty first.

These category trends reflect current demand from library users. The most-demanded categories of ebooks were “scholarly monographs” and “reference.”

Academic libraries are most likely to offer science, business, and technology titles in digital form. General trade fiction and bestsellers are not generally offered in e-format.

When asked to predict which disciplines would increase in ebook usage over the next two to three years, no real breakaway emerged. Science and technology head the list, but the numbers are down from last year. Again, this is due to the plateau effect: growth in top disciplines has flattened as libraries have accumulated many backlist or “evergreen” titles.

<b><i>In which discipline(s) do you project the greatest growth...</i></b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Science	66%	61%	53%
Technology	62%	59%	53%
Medicine	54%	53%	50%
Social Sciences	63%	54%	47%
Business	n/a	54%	46%
Humanities	50%	42%	35%
Education	n/a	n/a	30%
Law	35%	29%	19%
Other	36%	7%	22%

## User Experience

Library users confront a variety of barriers to ebook access in academic libraries. The top factor remains “unaware of ebook availability,” although it has been on the decline for the past three years even as “users prefer print” continues to climb. “Limited titles available” rises to 49%, and “complex downloading process” sprints to 41%.

<b><i>Barriers to user ebook access...</i></b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Unaware of ebook availability	62%	58%	52%
Users prefer print	40%	47%	50%
Limited titles available	41%	n/a	49%
Difficult to read onscreen/online	52%	45%	45%
Complex downloading process	14%	18%	41%
Digital rights management issues	55%	35%	37%
Difficult to find/Discover	32%	38%	32%
Not available for preferred devices	23%	32%	30%
Lack of training	26%	28%	29%
Difficult to annotate	32%	26%	27%
High demand titles not available for libraries	n/a	17%	24%
Ebook titles not available concurrent with print release	n/a	22%	21%
Limited access to ereading devices	20%	19%	19%
Faculty resistance	n/a	18%	18%
Long wait times for ebooks	n/a	4%	8%
Other	7%	10%	3%
Awkward interface	35%	n/a	n/a
Not downloadable	n/a	n/a	2%
Limited concurrent users	n/a	n/a	1%
Printing limitations	n/a	n/a	1%
None of the above	n/a	n/a	1%

## Ebook Readers and Formats

The personal laptop or computer remains the top hardware device on which students/faculty read ebooks, but other devices used to read ebooks are starting to make a challenge. Dedicated ebook readers continue to grow, and the iPad (or similar tablets), added to the 2012 survey, debuts at 40%. Note that tablets are in many cases perfectly capable of replacing laptop computers for the vast majority of tasks, certainly for ereading or accessing PDF-based documents like journal articles. Some institutions also use third-party apps (like Blackboard) to allow distance learners to access their online courses and libraries from an iPad. It is not difficult to envision the tablet replacing the laptop computer in the next five years.

<b><i>Device(s) on which library users most often read ebooks...</i></b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Personal laptop/ Computer/Netbook	84%	72%	75%
Library computer	70%	62%	58%
iPad or other tablet	n/a	n/a	40%
Dedicated ebook reader	12%	16%	25%
Smartphone	n/a	n/a	20%
Don't know	9%	16%	15%
iPod Touch or similar	n/a	n/a	7%
Other portable device	22%	17%	n/a
Other	1%	4%	n/a

As for ebook formats, basic PDF remains the preferred format for academic users, while those optimized for ereading devices and mobile are at record highs in the three-year history of this survey. Full-text HTML may be declining, but it is still a player at 23%.

<b><i>Preferred ebook format(s) by users...</i></b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
PDF	53%	54%	59%
Optimized for dedicated ebook device	13%	23%	30%
Optimized for other mobile device	14%	22%	28%
ePub	16%	19%	23%
Full text HTML	32%	28%	23%
Other	2%	4%	1%
Don't know	40%	33%	26%

## Libraries & Their Vendors

EBSCOhost (which acquired NetLibrary in 2011) is the top vendor employed by academic libraries for ebooks, while a somewhat distant second is Gale Virtual Reference Library (aka Gale/Cengage in previous surveys), followed by Ebrary.

As for the most preferred ebook vendors, graduate/professional libraries prefer Yankee Book Peddler, undergraduate libraries choose Ebrary, and community colleges—when they have a preference (45% said “no preference,” up from 21%)—favor EBSCOhost.

### Discounts?

More than half of respondents (57%) are dissatisfied with the discounts they receive (or don't receive) from ebook vendors—nine percent of those are “very dissatisfied.” Not one said it was “very satisfied.” Graduate/professional libraries are the most likely to be dissatisfied and community colleges are most likely to be satisfied with vendor discounts.

The most vitally important attribute of ebook vendors is, as ever, “ease of use for library users”—this was either very important or important for just about every respondent to this survey. The number two attribute was “timely receipt of MARC records for the library OPAC to support discovery,” followed by “multiple device options offered.”

“There need to be dramatic fixes and rollouts of serious across-the-board changes to get users on board with [ebooks] again if we want to increase use. We still get requests for print copies only because they're such a pain to use—from people who are plenty tech-savvy. It's a problem with the ebook, *not* the user.”

## Conclusions

Ease of use, multiple device support, and timely receipt of MARC records to support discovery top the list of what academic librarians want. The fairly negative data regarding satisfaction with discounts—combined with other challenges and concerns expressed quantitatively and qualitatively in this year's survey—suggest very strongly that the cost of ebooks is the number one issue for academic libraries. Without vendor help, it is the most insoluble of all the challenges that ebooks present.

There has been much turbulence with ebook pricing, and even the courts have become involved, with three publishers—Simon & Schuster, Hachette, and HarperCollins—implicated in ebook price fixing. Meanwhile, Apple was sued by the Department of Justice “charging that it conspired to limit ebook price competition.”<sup>3</sup> What these decisions will mean for ebook pricing—or for libraries—remains to be seen. Some have said it will lower ebook prices, but almost immediately after these decisions, Hachette jacked up the cost of ebooks

<sup>3</sup> Patricia Hurtado, “E-Book Publishers, States' \$69 Million Accord Approved,” Bloomberg, September 14, 2012, <http://www.bloomberg.com/news/2012-09-14/u-s-judge-approves-69-million-digital-book-accord-with-states.html>.

for libraries by 220%.<sup>4</sup> It's a jungle out there, and it's the librarians who have to get out the machetes and try to hack a clear path through the forest.

Despite all these pricing kerfuffles, the demand for electronic content is, at least for academic libraries, not even the *new* normal but an older normal by now. Access to ebook content for libraries remains restricted by pricing, limits on multiple access, DRM, and discovery issues. These can act as serious deterrents to the use of ebook collections, potentially derailing or undermining the deeper use of much of this technology, regardless of how well-entrenched it may have become.

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<sup>4</sup> Cory Doctorow, "Librarians to Hachette: Seriously? You want to triple the cost of ebooks?" Boing Boing, September 15, 2012, <http://boingboing.net/2012/09/15/librarians-to-hachette-seriou.html>.

## INTRODUCTION

### About the 2012 *Library Journal* Ebook Survey

Welcome to the third annual *Library Journal* study of ebook penetration in academic libraries. The present report is one of three—the other two look at public and school libraries—that look at the current state of ebooks and their place in libraries.

Our most recent survey reprises many questions from last year's survey—allowing us to track long-term trends more effectively, as we now have three data points to consider. We tweaked some questions based on responses to past surveys or to better reflect changes in the market so some data points may not be entirely congruent with past responses. And, of course, we added some brand new questions this year.

As always, we invited survey respondents to answer an open-ended question that asked about academic libraries' experience with ebooks in general. These comments generally reflected a very high comfort level with ebooks, both among library staff and among library patrons. These verbatim responses are a useful lens through which to view the quantitative results of our survey, and provide a useful “fly on the wall” perspective of what the ebook situation is for libraries.

A selection of these responses can be found at the ends of Chapters 2, 3, and 4.

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.

Many charts include both the 2012 and 2011 responses to a particular question to allow a quick comparison. In some cases, we altered the phrasing of a question or changed the response selection, so direct comparison would not be entirely possible. In those cases, we have presented the 2011 data in a separate chart. In some other cases, basic chart legibility precluded inclusion of the 2011 data series. In those cases, we also opted to add the 2011 data as a separate chart. Also in the interest of legibility and clarity, we have called out in commentary where the 2010 data demonstrated a clear trend. We have made these decisions on a question-by-question basis.

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. Where available, we also included the 2011 data in these tables 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](mailto:lgirmscheid@mediasourceinc.com).

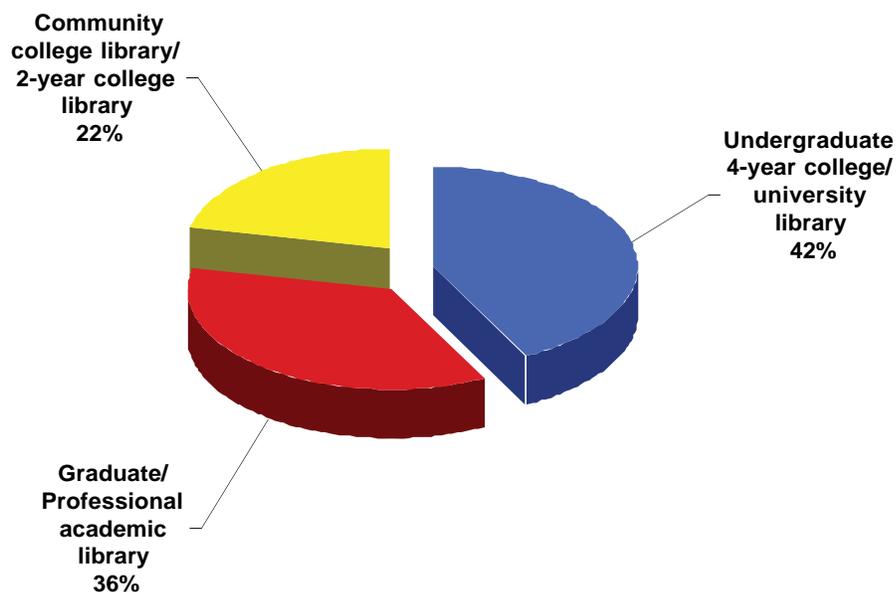
## 1. PROFILE OF RESPONDENTS

This section provides a basic demographic profile of the libraries that responded to our 2012 survey.

### Type of Library

As the chart below shows, 42% of the academic libraries responding to this questionnaire described themselves as “undergraduate,” while 36% described themselves as “graduate/professional.” Twenty-two percent were community colleges.

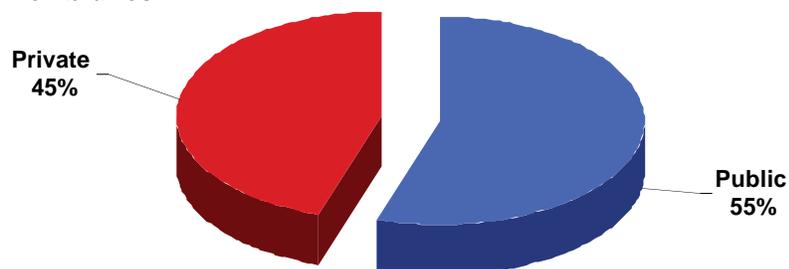
**Figure 1. Which of the following best describes your library?  
% of academic libraries**



### Public or Private

A little more than one-half (55%) of the academic libraries responding to our survey serve public institutions, while 45% serve private academic institutions.

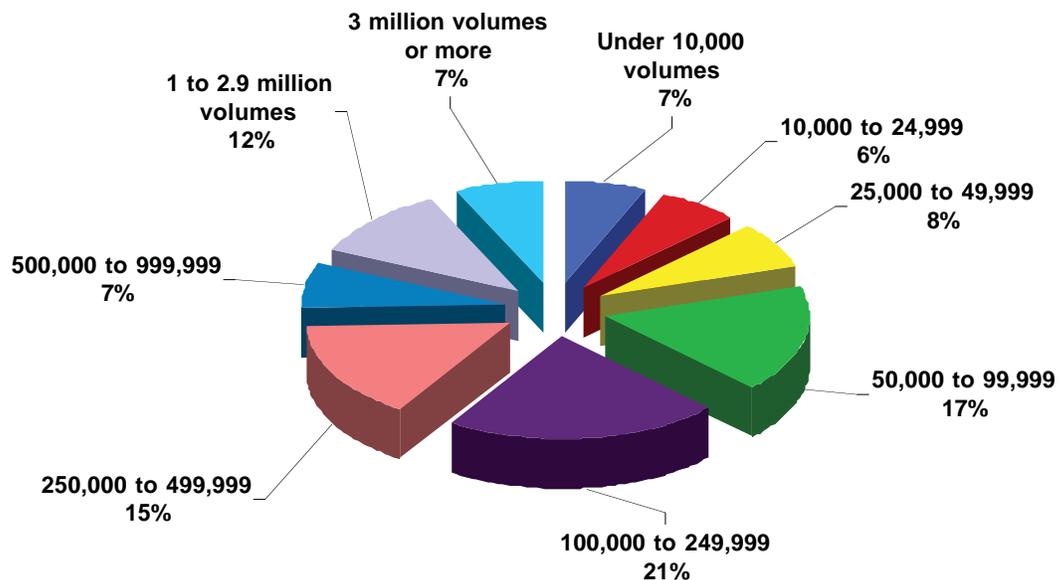
**Figure 2. Is your institution public or private?  
% of academic libraries**



## Number of Total Volumes in Library

Academic libraries responding to our survey have an average of 671,200 volumes<sup>5</sup> in their collections.

**Figure 3. What is the total number of volumes in all subject areas in your library?  
% of academic libraries**



The following table breaks down total number of volumes by type of library and acquisition budget.

**Table 1. What is the total number of volumes in all subject areas in your library?  
% of academic libraries by institution and acquisition budget**

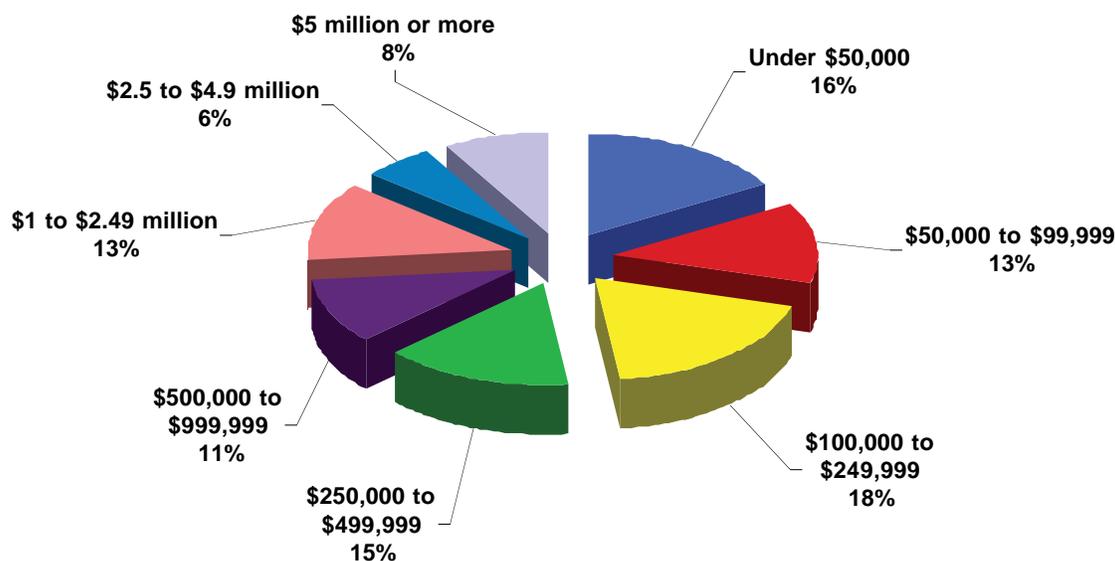
	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
Under 10,000 volumes	4%	7%	9%	5%	10%	17%	4%	1%
10,000 to 24,999	4%	3%	15%	7%	4%	14%	3%	1%
25,000 to 49,999	4%	4%	21%	6%	8%	16%	4%	2%
50,000 to 99,999	11%	12%	36%	16%	15%	31%	13%	1%
100,000 to 249,999	19%	28%	15%	16%	29%	17%	38%	3%
250,000 to 499,999	13%	23%	4%	14%	19%	4%	28%	11%
500,000 to 999,999	7%	11%	0%	11%	6%	1%	5%	23%
1 to 2.9 million volumes	25%	6%	0%	14%	6%	0%	3%	35%
3 million volumes or more	13%	5%	0%	10%	4%	0%	1%	22%
Mean # volumes (000)	1165.3	561.3	78.6	875.9	441.7	86.5	341.0	1789.2
Median # volumes (000)	403.8	227.0	56.6	247.1	168.6	55.2	201.2	1386.9

<sup>5</sup> Mean number of volumes: 671,200. Median number of volumes: 187,500.

## Acquisition Budget

The mean acquisition budget for the current school year for academic libraries responding to our survey was \$1.27 million.<sup>6</sup> Just over one-fourth of respondents (29%) reported that their total acquisition budget for the current year was less than \$100,000, while 27% reported that their total acquisition budget was more than \$1 million.

**Figure 4. What was your library's total acquisition budget (print and digital) for this academic year?**  
% of academic libraries



Graduate/professional level academic libraries' budgets are, on average, almost two-and-a-half times as high as undergraduate libraries'. Public academic institutions' budgets are about twice those of private institutions.

**Table 2. What was your library's total acquisition budget (print and digital) for this academic year?**  
% of academic libraries by type of institution

	Graduate/ Prof'l	Undergrad	Community College	Public	Private
Under \$50,000	8%	10%	43%	16%	15%
\$50,000 to \$99,999	6%	13%	23%	13%	13%
\$100,000 to \$249,999	11%	24%	21%	15%	24%
\$250,000 to \$499,999	16%	17%	9%	11%	18%
\$500,000 to \$999,999	10%	15%	4%	13%	10%
\$1 to \$2.49 million	17%	15%	0%	13%	12%
\$2.5 to \$4.9 million	12%	3%	0%	6%	4%
\$5 million or more	18%	4%	0%	13%	3%
Mean (\$000)	2,075.6	854.9	132.2	1,433.6	776.0
Median (\$000)	899.2	301.5	64.3	381.4	237.2

<sup>6</sup> Mean acquisition budget: \$1.127million. Median acquisition budget: \$281,900.

## Library Location

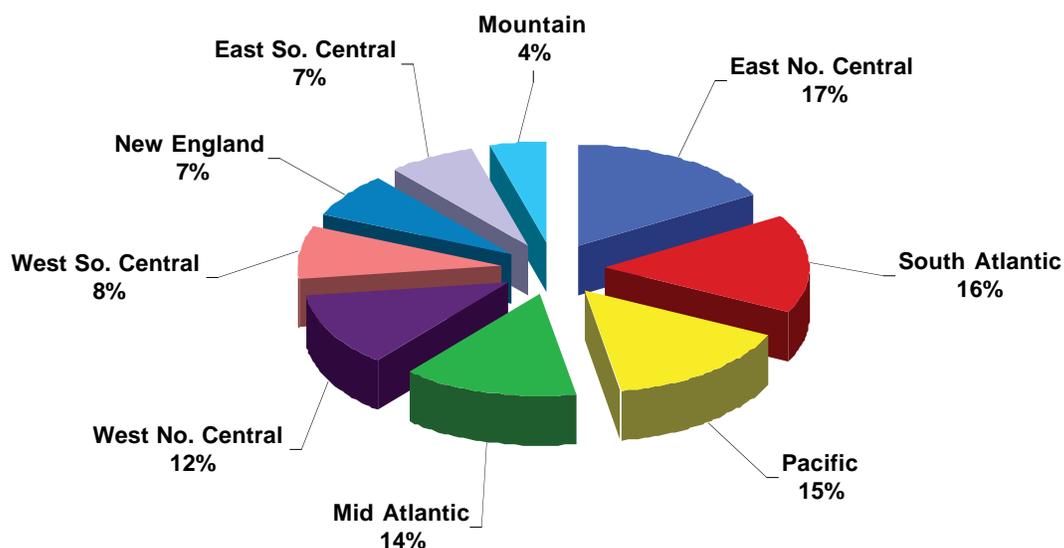
The following figure shows the geographical location of the libraries responding to our survey, based on U.S. Census Bureau regional classifications:

- 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: South Atlantic, East South Central and West South Central
- West: Mountain and Pacific

**Figure 5. In which region of the country is your library located?  
% of academic libraries**



The following table sorts the academic library respondents by the four larger regional classifications:

SOUTH	28%
MIDWEST	21%
NORTHEAST	19%
WEST	31%

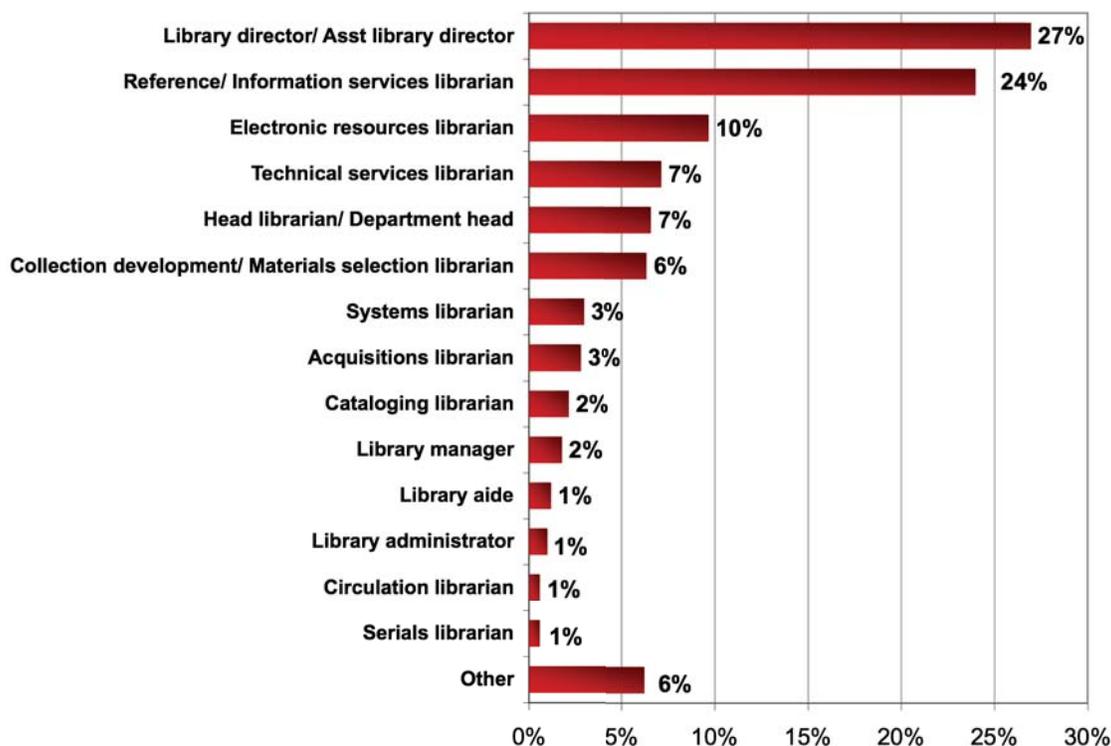
**Table 3. In which region of the country is your library located?  
% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
East No. Central	18%	14%	18%	19%	13%	16%	19%	9%
South Atlantic	17%	17%	12%	14%	18%	19%	17%	14%
Pacific	15%	12%	20%	15%	13%	20%	9%	19%
Mid Atlantic	9%	21%	8%	13%	18%	5%	19%	16%
West No. Central	11%	15%	8%	11%	13%	8%	15%	14%
West So. Central	9%	6%	12%	11%	5%	8%	7%	11%
New England	9%	8%	4%	5%	10%	8%	5%	11%
East So. Central	6%	4%	14%	7%	6%	10%	6%	1%
Mountain	4%	4%	6%	5%	4%	7%	3%	5%
MIDWEST	30%	28%	25%	31%	26%	24%	34%	24%
NORTHEAST	18%	28%	12%	18%	28%	13%	24%	27%
WEST	19%	16%	25%	20%	17%	26%	12%	24%
SOUTH	33%	27%	37%	32%	28%	36%	30%	26%

## Respondent Job Title/Ebook Recommendation Authority

This question sought to identify who on the library staff answered our survey. Most respondents identified themselves as the library director or the assistant library director (27%) or the reference or information services librarian (24%). Ten percent identified themselves as the electronic resources librarian.

**Figure 6. Which of the following comes closest to your job title?  
% of academic libraries**



In private institutions, our survey was most likely to be filled out by the library director or assistant director (35%), while in public institutions, it was most likely to have been completed by the reference or information services librarian (24%).

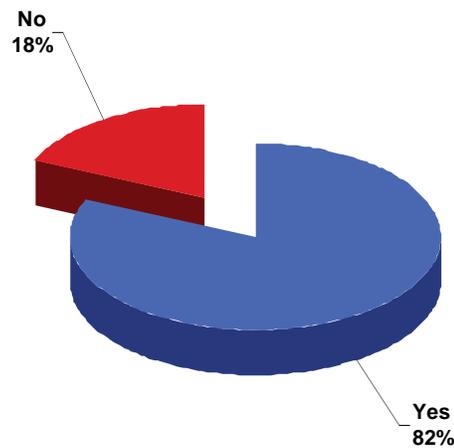
**Table 4. Which of the following comes closest to your job title?  
% of academic libraries by type of institution and acquisition budget**

	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/Asst library director	19%	27%	40%	19%	35%	39%	27%	15%
Reference/Information services librarian	24%	24%	25%	24%	24%	23%	24%	27%
Electronic resources librarian	10%	10%	9%	12%	7%	3%	13%	9%
Technical services librarian	7%	9%	4%	5%	9%	10%	8%	5%
Head librarian/Department head	9%	5%	6%	10%	3%	4%	7%	8%
Collection development/ Materials selection librarian	12%	4%	2%	8%	4%	1%	7%	10%
Systems librarian	2%	3%	4%	2%	4%	4%	3%	2%
Acquisitions librarian	4%	2%	2%	4%	1%	1%	4%	2%
Cataloging librarian	1%	2%	4%	3%	1%	2%	2%	2%
Library manager	3%	2%	0%	2%	1%	3%	0%	3%
Library aide	2%	1%	0%	1%	1%	1%	0%	2%
Library administrator	1%	1%	2%	2%	0%	1%	0%	2%
Serials librarian	1%	1%	0%	1%	1%	0%	1%	0%
Circulation librarian	1%	1%	0%	0%	1%	0%	1%	0%
Other	5%	9%	4%	7%	7%	8%	3%	10%

### Ebook Purchase/Recommendation Authority

The vast majority of respondents (82%) are involved in the ebook purchasing or recommendation process for their libraries. Survey questions related to library purchasing, licensing terms and vendors are based on respondents actively involved in this process.

**Figure 7. Are you involved in the recommendation/purchasing of or licensing process for ebooks for your library?  
% of academic libraries**



**Table 5. Are you involved in the recommendation/purchasing process of ebooks for your library?  
% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
Yes	82%	82%	80%	84%	80%	71%	88%	88%
No	18%	18%	20%	16%	20%	29%	12%	12%

## 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 consistent with that of the 2011 and 2010 surveys, facilitating comparisons and the identification of trends.

## 2. EBOOK COLLECTIONS

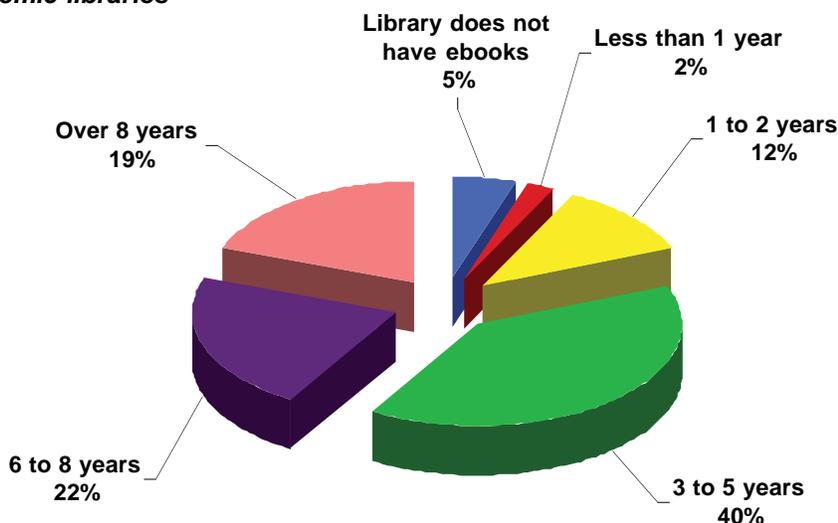
In this section, we take a look at the quantity and composition of academic libraries' ebook collections.

### Offer Ebooks

We rephrased our ebook collection question to determine not only if libraries have ebooks but how long they have carried them. We determined through this question that 95% of academic libraries carry ebooks, unchanged from last year's survey and one percent higher than in 2010.

Ebooks have been available for 5.2 years on average (i.e., since about 2007). Almost one-fifth (19%) say they have carried ebooks for more than eight years; this likely refers to ebooks as PDFs and other types of electronic formats that differ from the current perception of an ebook.

**Figure 8. How long has your library offered ebooks?  
% of academic libraries**



Almost all graduate level libraries (98%), undergraduate (95%) and community college (91%) libraries currently carry ebooks. Graduate and community college libraries in our sample have carried ebooks slightly longer than undergraduate libraries. Not unexpectedly, libraries with higher acquisition budgets have been acquiring ebooks for longer.

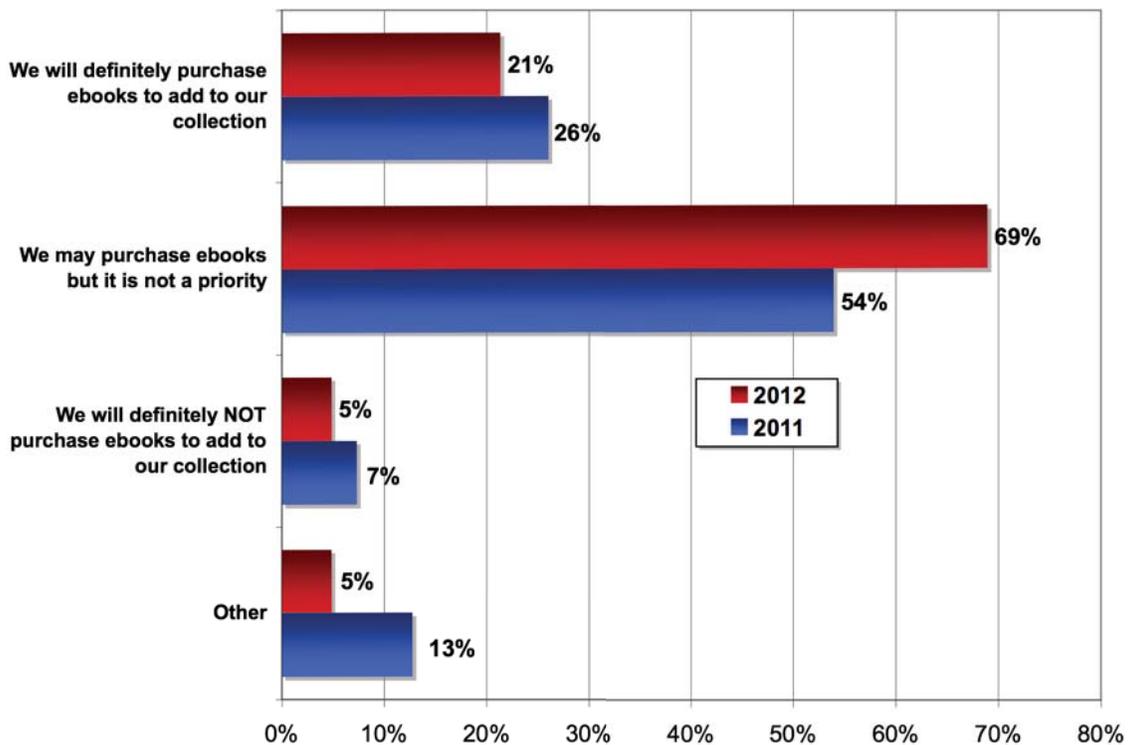
**Table 6. How long has your library offered ebooks?**  
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/Prof'l	Under-grad	Com-munity College	Public	Private	< \$100K	\$100K-\$999K	\$1 Mil+
Library does not have ebooks	2%	5%	9%	4%	7%	14%	2%	1%
NET Library has ebooks	98%	95%	91%	96%	93%	86%	98%	99%
Less than 1 year	4%	2%	0%	1%	4%	3%	1%	2%
1 to 2 years	8%	14%	13%	11%	14%	16%	14%	7%
3 to 5 years	37%	46%	32%	40%	41%	36%	39%	47%
6 to 8 years	28%	18%	21%	22%	20%	17%	23%	23%
Over 8 years	21%	15%	25%	23%	14%	14%	21%	20%
Mean # years	5.5	4.9	5.5	5.4	4.8	4.7	5.3	5.4

**Ebook Holdouts**

Of those few academic libraries that do *not* currently offer ebooks (5% of all academic libraries surveyed), the majority of them (69%, up from 54% last year) say they *may* purchase ebooks in the next two years, while 21% (down from 26%) say they *definitely* will be adding ebooks to their collections in the next two years. Only 5% insist that they will not carry ebooks. It bears mentioning that, two years ago in our 2010 survey, 47% of respondents who did not carry ebooks said they would definitely not be adding ebooks in two years.

**Figure 9. What are your library’s plans for ebook purchases in the next two years?**  
**% of academic libraries that do not carry ebooks**

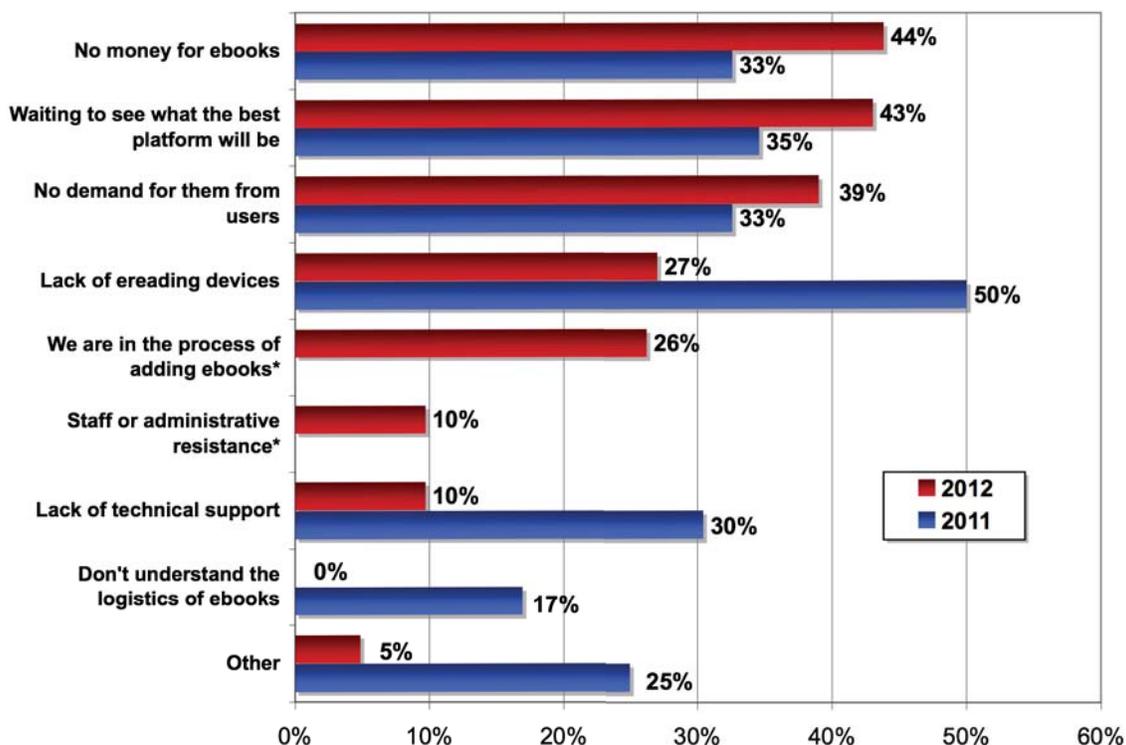


Given that the base for this question was very small (5% of all respondents), the data were too thin to break down by type of institution or acquisitions budget.

As for why academic libraries don't or won't carry ebooks, the top reason is now "no money for ebooks," rising from 33% of respondents that don't carry ebooks to 44% of respondents. Forty-three percent of respondents (up from 35%) are still "waiting to see what the best platform will be," and 39% of respondents (up from 33%) cited "no demand for them from users." "Lack of ereading devices" has become substantially less of a barrier to ebook acquisition, dropping from 50% to 27%. We added "we are in the process of adding ebooks," which came in at 26%.

Remember, though, that these figures only apply to 5% of our total response base.

**Figure 10. Why doesn't your library offer ebooks? (multiple responses permitted)**  
**% of academic libraries that don't carry ebooks**



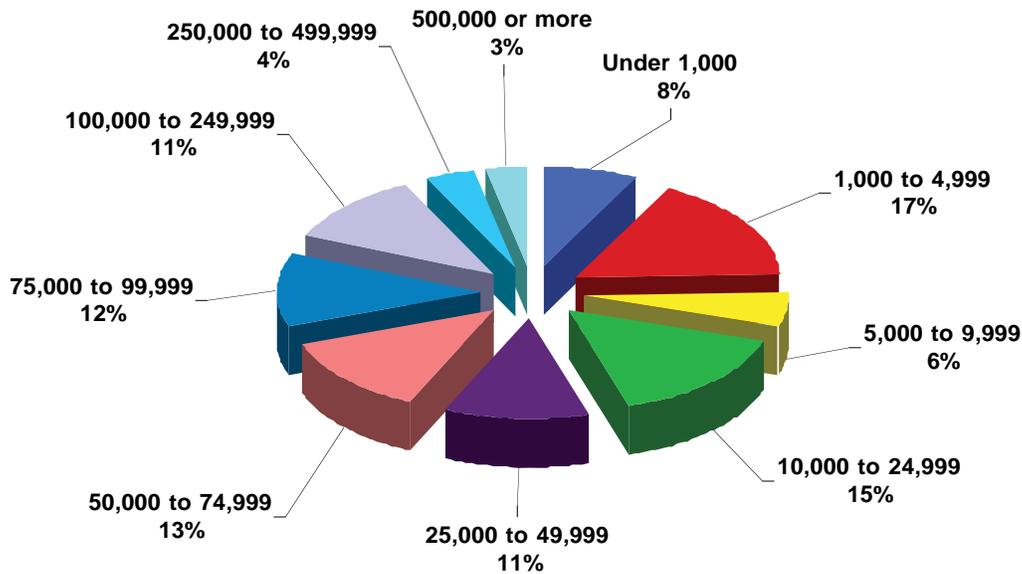
\* Added to 2012 survey

Again, the response base was too small to cross-tabulate by institution or acquisitions budget.

## Number of Ebooks Carried

Academic libraries' ebook collections are growing by leaps and bounds. In our current survey, the average number of ebooks carried was 91,900.<sup>7</sup> Last year, academic libraries' ebook collections amounted to a mean of 65,208 (median 17,500). In our 2010 survey, academic libraries carried on average 33,830 ebooks (median 16,666).

**Figure 11. How many ebooks does your library currently subscribe to or own?  
% of academic libraries**



Graduate and professional institutions are likely to have considerably more ebooks than undergraduate or community colleges. As one would expect, institutions with the largest acquisitions budgets tend to have the heftiest ebook collections.

<sup>7</sup> Mean number of ebooks carried: 91,900. Median number of ebooks carried: 37,500.

**Table 7. How many ebooks does your library currently subscribe to or own?  
% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
<b>2012</b>								
Under 250	9%	6%	4%	5%	8%	6%	8%	2%
Under 1,000	8%	5%	11%	6%	9%	10%	7%	5%
1,000 to 4,999	20%	14%	17%	15%	17%	20%	15%	15%
5,000 to 9,999	5%	5%	6%	8%	5%	11%	5%	4%
10,000 to 24,999	13%	13%	23%	16%	13%	15%	20%	8%
25,000 to 49,999	9%	10%	17%	12%	11%	10%	10%	12%
50,000 to 74,999	12%	13%	15%	10%	15%	16%	12%	9%
75,000 to 99,999	5%	20%	6%	10%	17%	8%	17%	12%
100,000 to 249,999	15%	12%	4%	15%	9%	10%	12%	13%
250,000 to 499,999	6%	4%	0%	5%	2%	0%	1%	12%
500,000 or more	6%	2%	0%	4%	3%	0%	0%	11%
Mean (000)	138.8	80.7	32.4	114.3	68.7	40.9	54.9	190.6
Median (000)	37.5	62.5	12.5	37.5	37.5	12.5	37.5	62.5
<b>2011</b>								
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 (000)	97.5	60.6	25.2	64.8	57.2	27.9	38.0	129.5
Median (000)	17.5	17.5	17.5	17.5	17.5	17.5	17.5	37.5

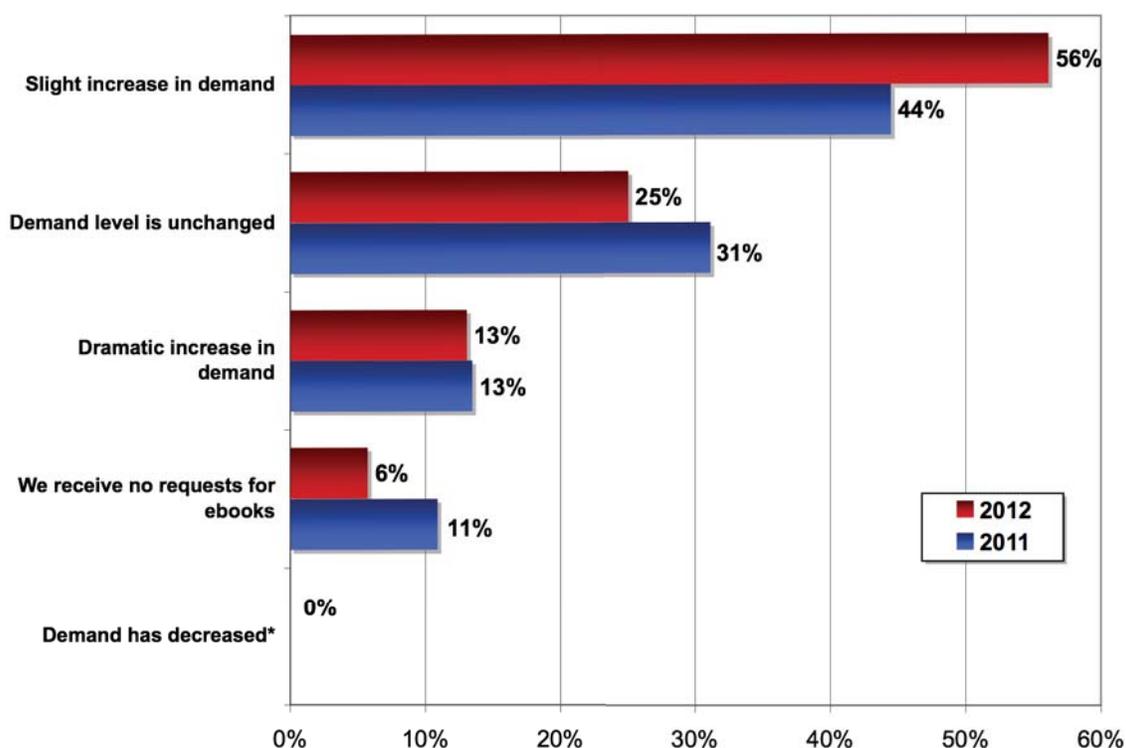
## Increased Demand for Ebooks

One of the top reasons that some academic institutions do not acquire ebooks is lack of demand from patrons. Among those who do carry ebooks, has demand been growing or shrinking?

More than one-half (56%, up from 44%) of respondents said they had seen a slight increase in demand for ebooks, with 13% citing a “dramatic” increase in demand. Three out of ten (31%) said the request level was unchanged, while 11% said they get no requests at all for ebooks. “We receive no requests for ebooks” dropped from 1% in 2011 to 6% in 2012. We added “demand has decreased” to the 2012 survey and it came in at 0%.

**Figure 12. Has your library experienced an increase in requests for ebooks since this time last year?**

*% of academic libraries*



\*Added to 2012 survey.

“We receive no requests for ebooks” fell from 16% of community colleges last year to 2% this year. But graduate and professional institutions were the most likely to have experienced a dramatic increase in demand for ebooks over that time period.

**Table 8. Has your library experienced an increase in requests for ebooks since this time last year?****% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Dramatic increase in demand	18%	12%	6%	13%	12%	9%	9%	24%
Slight increase in demand	56%	51%	67%	55%	54%	44%	57%	61%
Demand level is unchanged	18%	31%	25%	26%	26%	37%	28%	12%
Demand has decreased	0%	0%	0%	1%	0%	0%	0%	1%
We receive no requests for ebooks	7%	6%	2%	5%	7%	10%	6%	2%
<b>2011</b>								
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

We need to clarify a few things with regard to ebooks, especially when it comes to academic libraries as compared to public libraries. Whereas the latter are far more likely to consider ebooks in the popular sense of a Kindle, Nook, or SONY Reader version of a print title like a novel or trade nonfiction book, in academia an “ebook” can take any number of forms, from PDF files of research studies, monographs, etc. (sometimes scanned and distributed by professors, similar to the way instructors used to avail themselves of Kinkos’ photocopying services), to electronic versions of scholarly titles or textbooks, to academic journal articles accessed online as HTML pages on the Web.

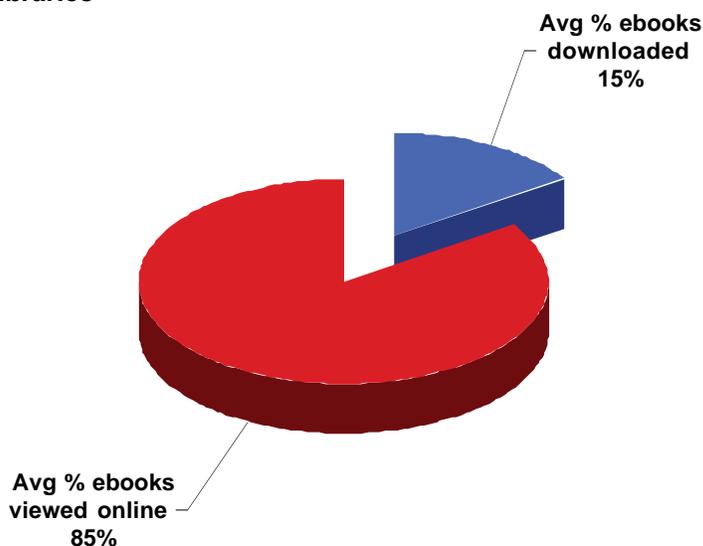
Then there are the devices—personal computers, library computers, laptops, dedicated ebook readers (like Amazon Kindles or Barnes & Noble Nooks), and even smartphones like iPhones—which can all be used to access ebook content, whether it’s in the library or not. Tablet computers like the iPad and the more recent Kindle Fire also took the world by storm over the past two years. As a result, we have tweaked our survey to take into account these new ereading devices.

The issue of competing formats and devices has been a serious issue in public libraries, less so in academic libraries, as the latter are often required to carry titles that are not available in consumer ebook formats and thus need to be read on a proper computer—or, indeed, in print.

**Downloaded Ebooks vs. Online Ebooks**

In a new question, we learn that 85% of academic libraries’ ebook collections are viewed online, compared to a slim 15% that are downloaded. This points to the difference between academic and other types of libraries—the material they carry is of a very different nature, and is more for research than for pleasure reading. It’s the type of content that users would have been required to go to the library to access in the pre-Internet days when working on class papers, reports, or theses. (We cover the specific content areas in a question later in this report.) This is also an issue with regard to usage models and terms that vendors offer libraries. Some vendors *only* allow non-downloadable ebooks to be purchased by libraries—or make downloadable titles prohibitively expensive for many libraries.

**Figure 13. What percent of your library ebook usage would you estimate consists of downloaded ebooks vs. ebooks viewed online?**  
*% of academic libraries*



Graduate and professional institutions are slightly more likely than others to have their ebook collections downloaded (18.1%) while community colleges are more likely (88.6%) to have their ebooks viewed online.

**Table 9. What percent of your library ebook usage would you estimate consists of downloaded ebooks vs. ebooks viewed online?**  
*% of academic libraries by type of institution and acquisition budget*

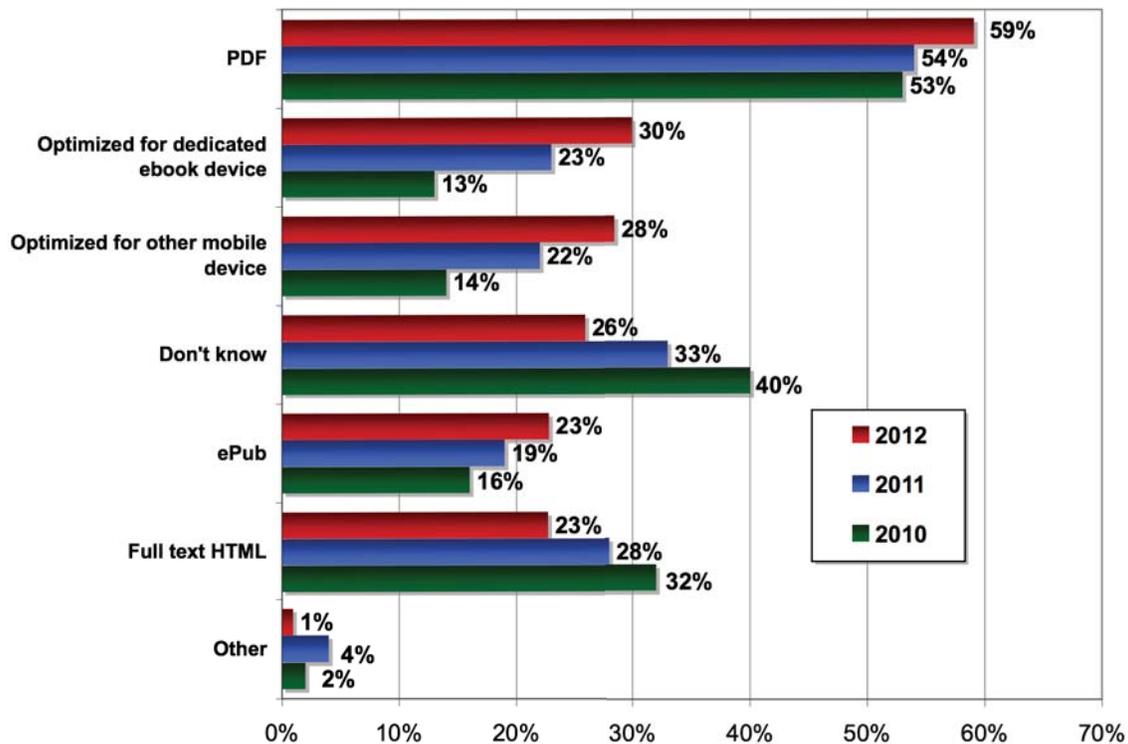
	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
Avg % ebooks downloaded	18.1	15.4	11.4	16.6	13.5	14.8	16.4	14.0
Avg % ebooks viewed online	81.9	84.6	88.6	83.4	86.5	85.2	83.6	86.0

## Ebook Formats

Since we began our survey in 2010, the basic PDF has remained the preferred format. This year, that is unchanged, with 59% of academic libraries selecting it, up five percentage points from last year and at an all-time high over the history of this survey. Number two last year was “full-text HTML” (i.e., Web pages), which drops to the bottom of the list this year. “Optimized for a dedicated ebook device” rises to an all-time high of 30% (it was 13% in 2010), and “optimized for other mobile device” rises to a high of 28% (from 22% in 2011 and 14% in 2010). The standard ePub format is most closely associated with Apple’s iBooks, the default ebook format for the iPad, and in terms of user preference is at 23%, up from 19% last year and 16% in 2010. When it comes to ePub, it is entirely possible that users prefer iBooks and other formats without necessarily being aware that the underlying file format is ePub.

”Don’t know” dropped from 33% to 26% (it was 40% in our 2010 survey), proving that librarians are doing their “due diligence” to find out what formats are preferred.

**Figure 14. In which format do users prefer ebooks? (multiple responses permitted)**  
% of academic libraries



As always, graduate and professional institutions are most likely to say their users prefer their ebooks in PDF (65%), and ebooks optimized for mobile devices shakes out as their number two choice (34%). Undergraduate libraries' two most popular formats are PDF (54%) and optimized for a dedicated ebook device (36%). The top two formats for community college libraries are PDF (59%) and full-text HTML (31%). The top two formats for community college libraries are PDF (59%) and full-text HTML (31%).

**Table 10. In which format do users generally prefer ebooks? (multiple responses permitted)**

**% of 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+
<b>2012</b>								
PDF	65%	54%	59%	54%	60%	60%	50%	67%
Optimized for dedicated ebook device	31%	36%	14%	25%	35%	31%	32%	31%
Optimized for other mobile device	34%	30%	14%	28%	29%	24%	33%	29%
ePub	25%	24%	14%	15%	30%	20%	25%	22%
Full text HTML	24%	18%	31%	19%	25%	27%	19%	22%
Other	1%	1%	0%	1%	1%	0%	1%	2%
Don't know	25%	29%	21%	28%	26%	24%	29%	24%
<b>2011</b>								
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%

### Ebook Reading Devices

We traditionally ask libraries about the hardware devices on which library users read ebooks. The personal laptop computer or netbook remains at the top, cited by 75% of respondents, up a couple of percentage points from last year—but then this was at 84% in our 2010 survey. The library computer continues its decline, falling to 58% from 62% last year, and down from 70% in 2010.

In the 2012 survey, we added “iPad or other tablet” and it debuted at 40% of all academic libraries.

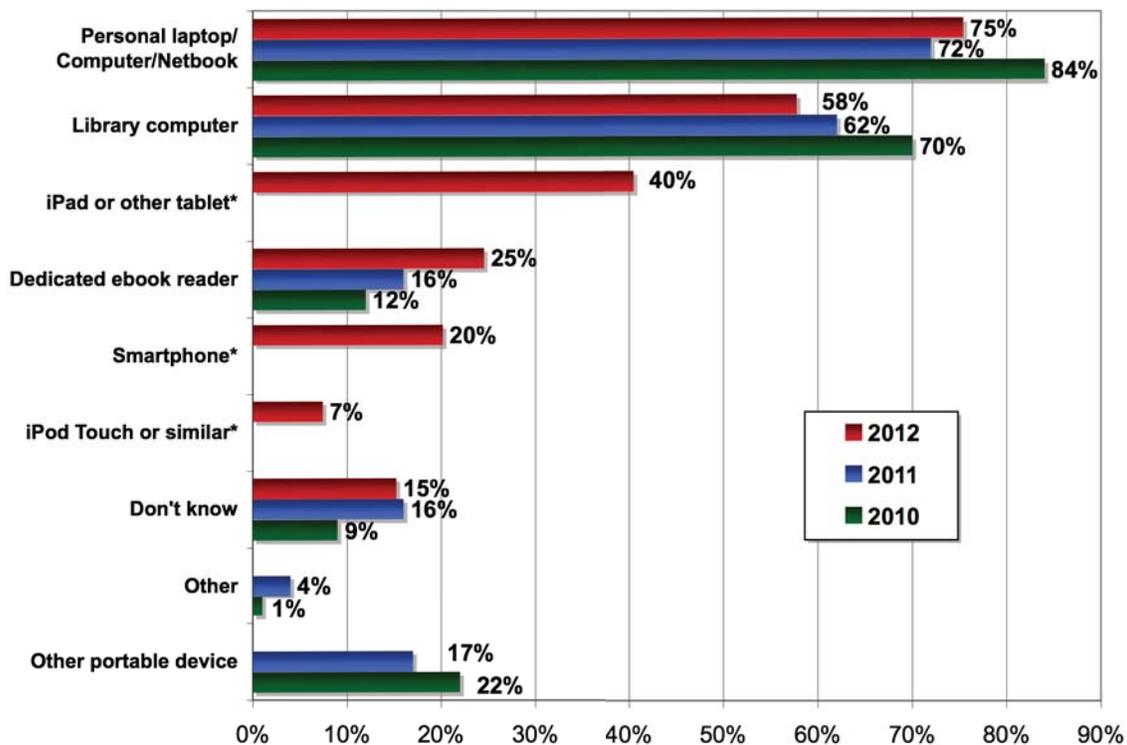
“Dedicated ebook reader” was cited by an all-time high of 25% of respondents, up from 16% last year and 12% in 2010.

We added “smartphone” and “iPod Touch or similar,” which were selected by 20% and 7% of respondents, respectively. Some of these answers likely

transferred from the older “other portable device” category, which we dropped in the 2012 survey, but in 2011 came in at 17%.

The number of respondents that don’t know which hardware is preferred stayed just about the same at 15%—back in 2010, it had been at 9%. We remarked last year that this is possibly due to an increase in distance learning students, but as any given device—like an iPad—can handle a wide variety of formats, especially PDF, it may be as difficult to determine which hardware library users are accessing content with as it would be to determine which brand of computer they were using.

**Figure 15. On what device(s) do your library users most often read ebooks? (multiple responses permitted)**  
% of academic libraries



\* Added in 2012 survey.

\*\* In 2011 survey only.

Community college users are more likely to use the library's computer (66%) and less likely to utilize a portable device or dedicated ebook reader.

**Table 11. On what device(s) do your library users most often read ebooks? (multiple responses permitted)**  
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Personal laptop/ Computer/Netbook	72%	83%	66%	74%	79%	71%	77%	83%
Library computer	51%	60%	66%	61%	58%	67%	52%	60%
iPad or other tablet	51%	39%	21%	38%	42%	29%	39%	55%
Dedicated ebook reader (e.g., Nook, Sony Reader, Kindle)	29%	23%	17%	19%	26%	22%	22%	31%
Smartphone	24%	20%	14%	22%	18%	15%	22%	21%
iPod Touch or similar	11%	7%	0%	7%	7%	5%	7%	10%
Don't know	18%	12%	17%	17%	12%	13%	18%	9%
<b>2011</b>								
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%

## Ebook Categories and Disciplines

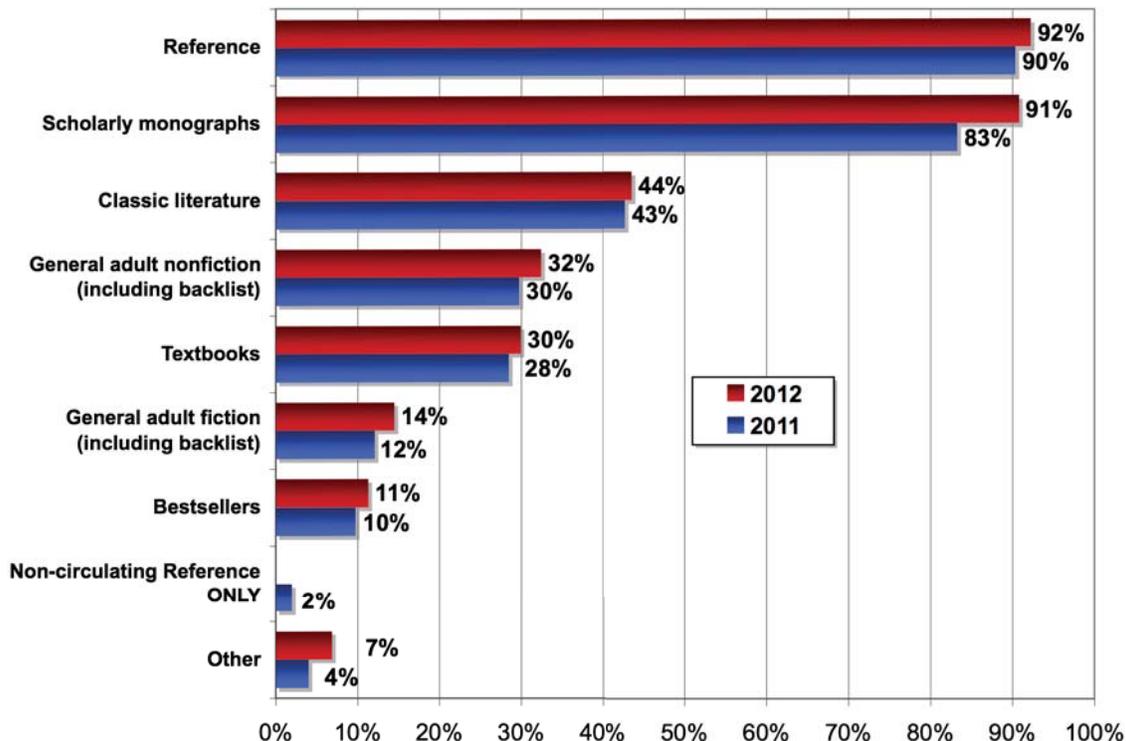
Although librarians do bemoan the paucity of titles available in some areas (see the verbatim comments throughout this report), ebooks are available in just about every category in which printed books are available. So, in our annual survey, we traditionally ask about general subject categories and specific disciplines.

In terms of general categories, there has not been a great deal of year-to-year change in most of these categories—although “scholarly monographs” is up from 83% to 91%. This category started out at 89% in 2010, so these fluctuations could be a function of our sample.

Still, the top category remains reference materials (92%, up from 90%). “Classic literature” is the number three category at 44%, followed by “general adult nonfiction” at 32%. We used to break out “non-circulating reference only” separately, but the responses were so small (2% in 2011) that we decided to forgo it.

Etextbooks are not widely popular (offered by about a third of libraries) and their incidence is relatively unchanged since last year.

**Figure 16. Which categories of ebooks does your library currently offer users? (multiple responses permitted)**  
**% of academic libraries**



Undergraduate and community college libraries have boosted their scholarly monograph collections (from 85% to 96%, and from 69% to 94%, respectively), while community colleges have increased their general nonfiction ebooks (47% to 61%).

Etextbooks have become more prevalent in community college libraries, jumping from 16% in 2011 to 29% in 2012. The availability of etextbooks in graduate and undergraduate libraries has declined ever so slightly in the same time period.

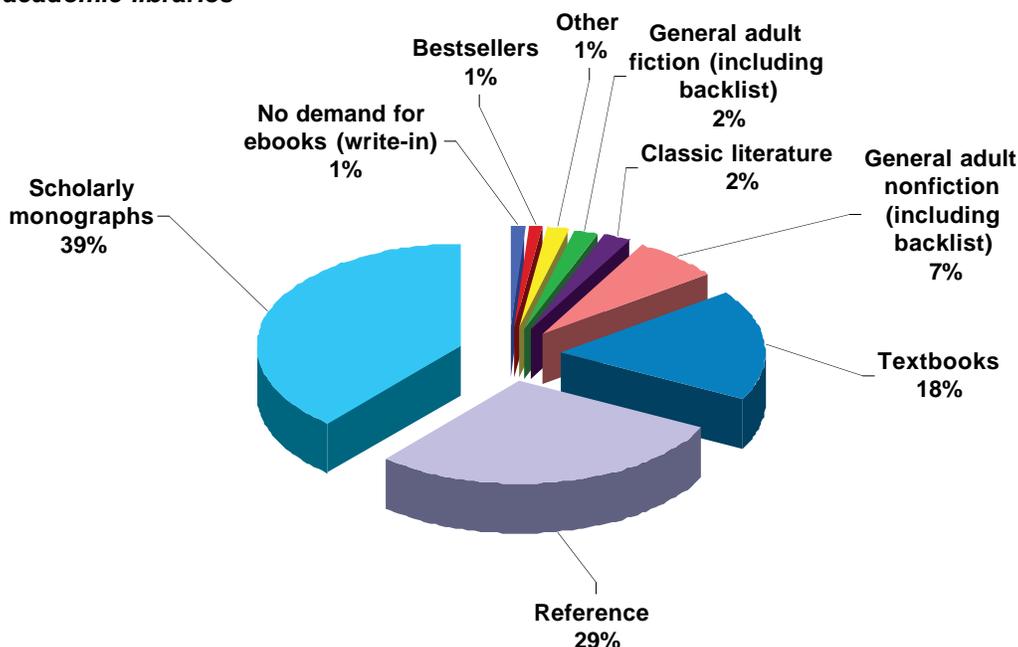
**Table 12. Which categories of ebooks does your library currently offer users? (multiple responses permitted)****% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Reference	88%	96%	94%	93%	93%	93%	93%	92%
Scholarly monographs	93%	93%	81%	92%	91%	80%	93%	98%
Classic literature	39%	45%	48%	43%	44%	45%	47%	38%
General adult nonfiction (including backlist)	24%	27%	61%	35%	25%	30%	32%	27%
Textbooks	38%	23%	29%	27%	29%	25%	25%	37%
General adult fiction (including backlist)	16%	12%	16%	14%	12%	13%	17%	10%
Bestsellers	11%	10%	16%	15%	6%	7%	12%	10%
Other	8%	4%	10%	5%	8%	5%	10%	2%
<b>2011</b>								
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%

### Categories in Demand

We added a follow-up question to our 2012 survey to gauge which of the above categories were most in demand. The most in-demand category was “scholarly monographs,” selected by 39% of respondents, followed by “reference” at 29%. Textbooks are at 18%. One percent of respondents wrote in “no demand for ebooks.”

**Figure 17. Which category of ebooks is most in demand in your library?  
% of academic libraries**



Graduate/professional libraries are the most likely to see demand for scholarly monographs (44%) and etextbooks (22%), while community colleges see higher-than-average demand for general nonfiction (23%). Community colleges also seem to be where the bulk of the “no demand for ebooks” responses come from.

**Table 13. Which category of ebooks is most in demand in your library?  
% of academic libraries by type of institution and acquisition budget**

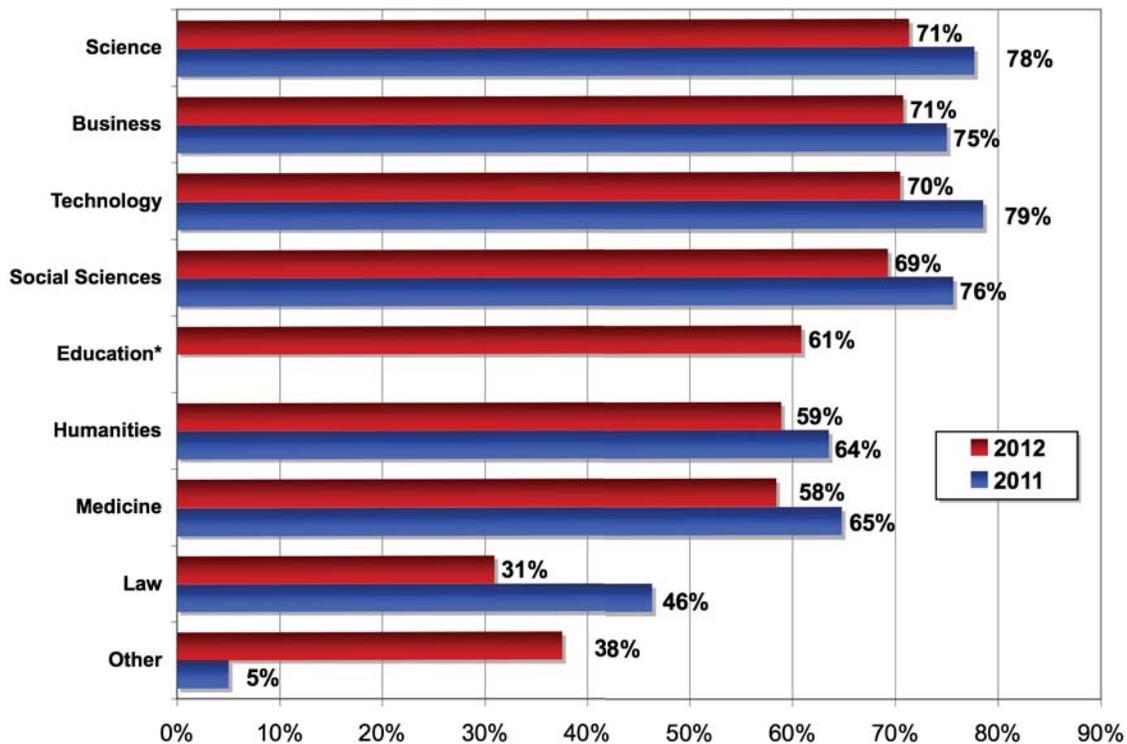
	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
Scholarly monographs	44%	40%	23%	36%	45%	44%	35%	42%
Reference	24%	30%	37%	30%	28%	26%	33%	25%
Textbooks	22%	17%	10%	18%	17%	11%	16%	25%
General adult nonfiction (including backlist)	1%	5%	23%	9%	3%	11%	5%	3%
Classic literature	3%	3%	0%	1%	4%	2%	2%	2%
General adult fiction (including backlist)	1%	2%	3%	2%	1%	4%	2%	0%
Bestsellers	1%	2%	0%	3%	0%	0%	2%	2%
Other	3%	1%	0%	1%	2%	0%	3%	0%
No demand for ebooks	0%	1%	3%	1%	1%	2%	1%	0%

## Disciplines

There has been a little movement in the specific disciplines that are offered as ebooks. “Science” is tied with “business” at 71%, the former down from 78% in the last survey, the latter down from 75%. “Science” was cited by 82% of respondents in our original 2010 survey, while business had been cited by 75%. “Technology” was the former number one discipline (it debuted at 80% of academic libraries in 2010, dropped a tick to 79% in 2011, and in 2012 is down to 70%).

We added “education” to the 2012 survey and it debuted at 61%. Curiously, “other” spiked to 38% from 5% last year (although in 2010 it had been at 50%). The bulk of “other” responses were “religion” and “nursing.”

**Figure 18. For which disciplines are you most likely to offer ebooks? (multiple responses permitted)**  
% of academic libraries



\*Added in 2012 survey.

Among graduate/professional institutions, ebook collections concentrate in the discipline of the specific type of institution (medical school, law school, etc.), so the specific disciplines cited in this survey are a function of the type of institutions that comprised our sample. Community colleges have all disciplines fairly evenly represented, although “law” is far down the list. Business ebooks spike in undergraduate institutions and community colleges, but are down from last year among the latter. Community colleges are the most likely of the three institution types to have selected “other.”

**Table 14. For which disciplines are you most likely to offer ebooks? (multiple responses permitted)**

**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Science	69%	72%	74%	84%	58%	55%	71%	85%
Business	61%	80%	71%	74%	70%	71%	76%	67%
Technology	68%	66%	84%	81%	58%	59%	67%	85%
Social Sciences	58%	73%	84%	75%	64%	66%	77%	58%
Education	53%	65%	68%	70%	51%	52%	69%	53%
Humanities	44%	70%	65%	63%	57%	57%	68%	47%
Medicine	63%	53%	61%	60%	57%	55%	57%	62%
Law	28%	30%	39%	34%	28%	25%	40%	22%
Other	33%	38%	45%	39%	34%	29%	49%	25%
<b>2011</b>								
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%

### Discipline Growth

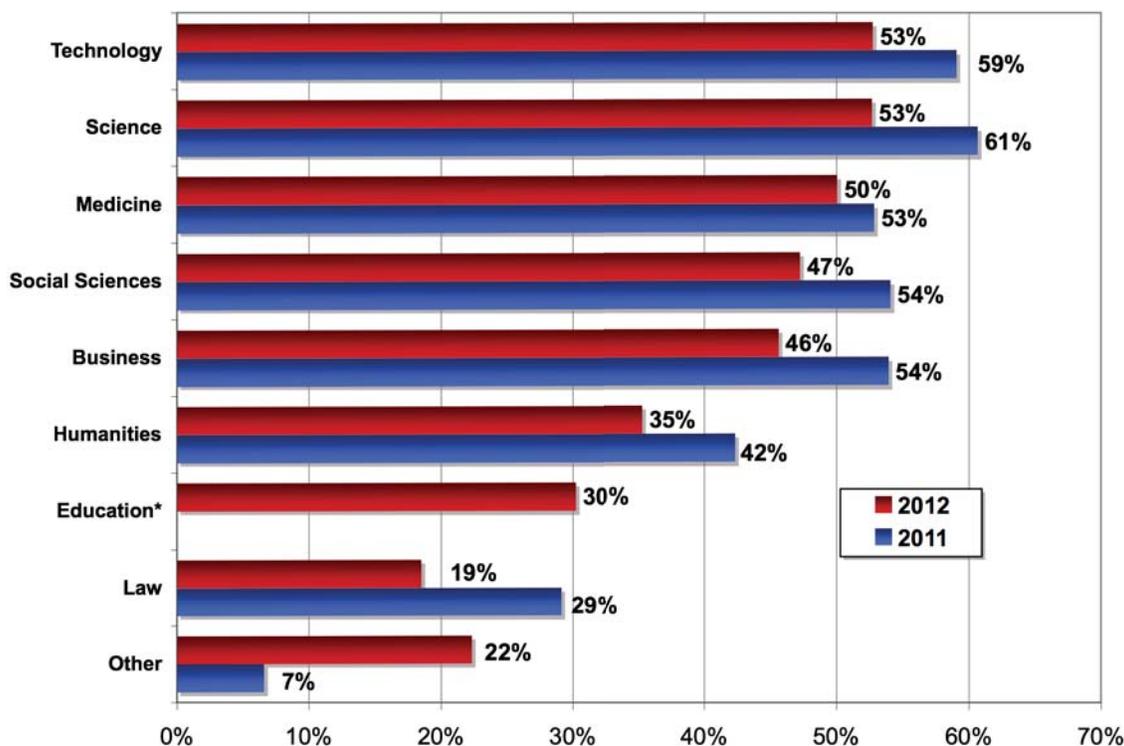
Which disciplines are likely to see the biggest ebook growth among academic libraries in the next two to three years? As was the case last year, science and technology lead the pack, although both were down this year compared to last year. “Technology” ebook titles were cited by 53% of all academic libraries, down from 59% last year, and down from 62% in our 2010 survey. “Science” came in at 53%, down from 61% last year, and down from 66% in 2010.

“Medicine” is the number three growing discipline, but, at 50%, is down from 53% last year, and down from 54% in 2010.

All of these categories are seeing declines, and for all of them, the highest reported demand came in our 2010 survey. However, this is logical, as the last several years have seen libraries build up their collections in ebook titles relevant to their fields of study, and further growth in most disciplines will simply be the acquisition of new titles coming onto the market.

**Figure 19. In which discipline(s) do you project the greatest growth in ebook usage in the next 2 to 3 years? (multiple responses permitted)**

*% academic libraries*



\*Added in 2012 survey.

Community colleges had been seeing increased demand for medicine-related ebook titles, but in 2012 medicine has given way to science and technology.

**Table 15. In which discipline(s) do you project the greatest growth in ebook usage in the next 2 to 3 years? (multiple responses permitted)**

**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Technology	49%	49%	69%	60%	42%	46%	46%	64%
Science	56%	50%	52%	65%	40%	33%	48%	73%
Medicine	49%	47%	59%	50%	49%	50%	47%	51%
Social Sciences	45%	50%	45%	49%	48%	42%	52%	44%
Business	42%	52%	38%	43%	47%	50%	46%	42%
Humanities	29%	44%	31%	36%	37%	27%	41%	36%
Education	30%	36%	17%	31%	29%	17%	39%	29%
Law	21%	17%	17%	18%	19%	12%	23%	17%
Other	22%	25%	17%	21%	23%	12%	29%	20%
<b>2011</b>								
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%

## General Conclusions

Academic libraries were early adopters of electronic content; indeed, one-fifth of survey respondents say they have offered “ebooks” for more than eight years—even though what we traditionally think of an ebook has only existed for about six years. Overall, libraries have carried ebooks for an average of five years, so they seized on new formats even when they were the “bleeding edge.”

As we will see elsewhere in this report, technology is becoming less of a challenge, at least as far as ebooks are concerned, and today’s challenges are money-related, with those few libraries that do not carry ebooks predominantly citing “no money for ebooks” as the reason.

Collections are growing by leaps and bounds, with ebook collections having grown an average of 200% in the past two years. That said, demand for ebooks has tapered off, but that is to be expected when collections increasingly meet the needs of library users.

What an academic library deems an “ebook” differs from what public libraries do—a lot of academic content is available in a wide variety of formats, not all of it the commercial formats public libraries tend to utilize. On the plus side, this content is often available online only, usually via a Web browser, meaning that users can access a library’s ebook content on whatever device s/he likes, although more and more users seem to be gravitating toward dedicated ebook readers for many titles.

We are seeing more tablets like iPads used by library users. Many of these tablets, especially the latest generations, can access the same online content as full-fledged computers or laptops, and we expect that the line between tablets and laptop computers will blur substantially in the coming years.

Distance learning programs make remote access to library materials a necessity, thus further driving the demand for electronic media. This can unfortunately make the specific means of access invisible to the library staff. Although “Web browser” is the most common option, there are also iPad/iPhone apps, like Blackboard Learn, that can access institutions’ distance learning portals directly from mobile devices.

Demand for specific categories and disciplines is stable, likely the result of libraries already having amassed substantial collections in those areas.

## 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).

- A powerful hindrance to my buying an ebook (I'm a selector), is not having the price readily available. Unless I have to have the particular title, "call publisher for pricing" kills my selection completely.
- Printing, downloading, DRM hassles really prevent students from using the books, which makes librarians crabby about promoting them. So many of these books have limited audiences anyway—all this rights management and user difficulty just mean nobody is using/reading the books anyway.
- Although we've had a few ebooks for years, we've seen the usage skyrocket this year.
- Desperately in need of standards. Think about how flexible and easy to use a print book is—no matter where it came from!
- Different vendors using different platform = confusion.
- Distinction must be made between downloadable books (Overdrive) and ebooks (books 24 x 7, Safari). We use Overdrive for pop business, fiction and popular nonfiction as only 1 user at a time. Academic content we use Books 24x7, EBSCO ebooks and Safari as there is not a user limit.
- Ebooks continue to be a work in progress. There remain significant barriers to their wider use, including overly restrictive DRM, pricing, usability, and cultural resistance.
- Ebooks have been a net plus for us. Better searching software and easier downloading (for instance, not requiring users to install Adobe Editions separately), easier reading on mobile devices, better mobile device software would help.
- Ebooks need to be easy to use and for the most part they aren't. They need to be downloadable and unencumbered with complicated access processes.
- I believe that ebooks will be very useful to our patrons once we are able to purchase more and increase patron awareness of their availability.
- I have asked my liaisons to stop ordering Ebrary due to their unfriendly interface, need to download Digital Editions PDF software on all computers, convoluted download process, and the fact that you can't distinguish in the LMS btw books purchased and books downloaded as part of a PDA plan.

- I wish the publishers would offer ebooks at the same time that they offer print. I have to hold some of my purchasing until the ebook becomes available. If it doesn't, I MIGHT purchase the print but that is not my #1 choice in come of my disciplines! Print is the LAST choice in some of my disciplines due to high demand, distance learners and theft!
- I would like to move to more materials that can be efficiently used over connections with narrower bandwidths.
- Interesting that our use went down last year.
- More publishers need to figure out their models and pick a standard. Competing formats are not helping anyone. HarperCollins model of x number of uses is unacceptable and unusable. Patron-driven acquisition has provided the best model for our patrons, and I hope they continue to improve.
- More publishers need to offer “shopping cart” one at a time purchases of the major platforms.
- Most of the ebooks selected are fiction and 6–12 fiction. Nonfiction titles, if they come out at all, are months later and in academic libraries, we need them for instructors and students sooner. So I purchase the hard copy.
- Most patrons (students) still prefer to read books in print. They tell me that they look at the computer screen all day and the idea of sitting for additional hours with an ebook does not sound appealing. Honestly, they avoid ebooks.
- Not well-used at all. Our community college students have enough trouble reading their textbooks.
- Our library will only purchase multi-user subscriptions, and many textbook vendors do not offer that option.
- Our preference for ebooks direct from publisher is because we typically get better flexibility than with an aggregator. Most scholarly publishers allow download at chapter level of PDF, unlimited concurrent users, plus standard searching and usability features. Aggregators are convenient however DRM and limits on concurrent users are an issue.
- Our students are gradually starting to use more ebooks as textbooks, so that makes them more comfortable with them when they get to the library.
- Our students often prefer ebooks to print books when under time constraints. However, they generally prefer to do in depth research with resources in print.
- Pricing is an issue. We have mostly pursued collections available through consortial arrangements.

- Print books remain less expensive for us because we can frequently buy below list price. Ebooks generally seem to be either list price or higher and this is a barrier for us.
- Professors tell us the citations they receive from students using ebooks drive them nuts.
- Publishers are holding back and not letting libraries purchase electronic books because they are afraid of losing their individual purchasers. This is cutting the library out of the process. In the end, I think this will end up hurting the publishers. They should let us in.

### 3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

In this section, we look at some of the specifics of the type of access to ebooks libraries give users (based on what vendors give to libraries), as well as circulation trends.

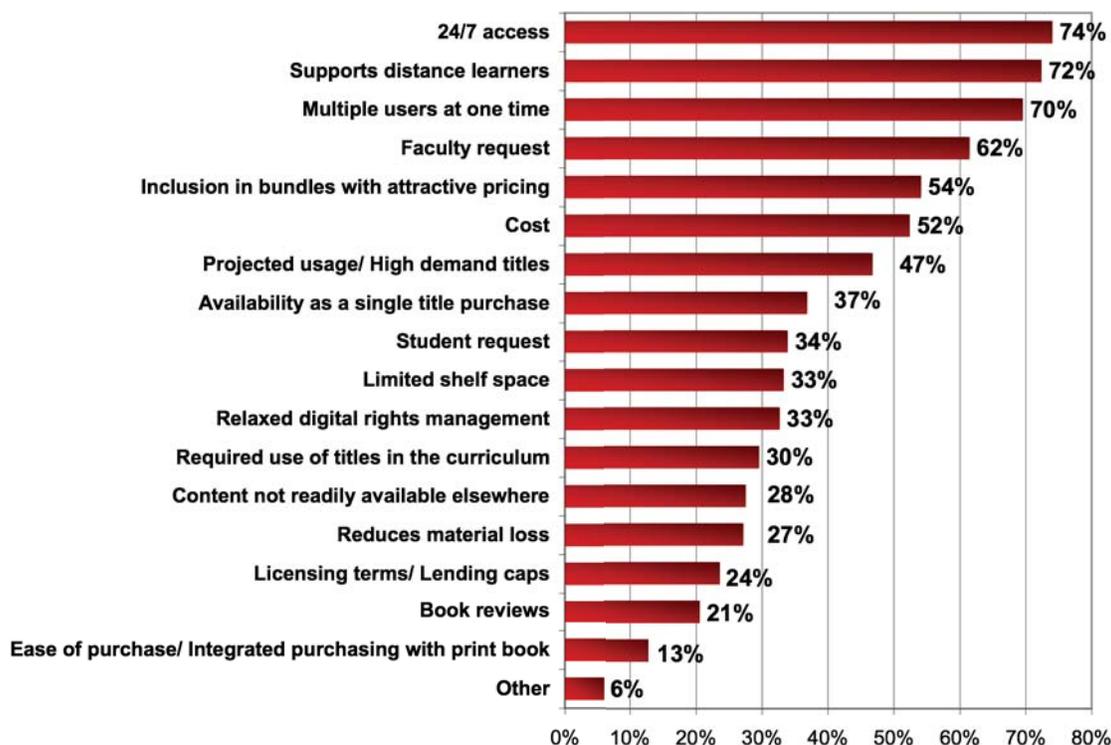
#### Acquisition

We revamped many of the items in our perennial question about the factors that influence an academic library's decision to purchase an ebook. The 2012 survey responses are presented in Figure 20 below, while the responses to our 2011 survey are presented in Figure 21.

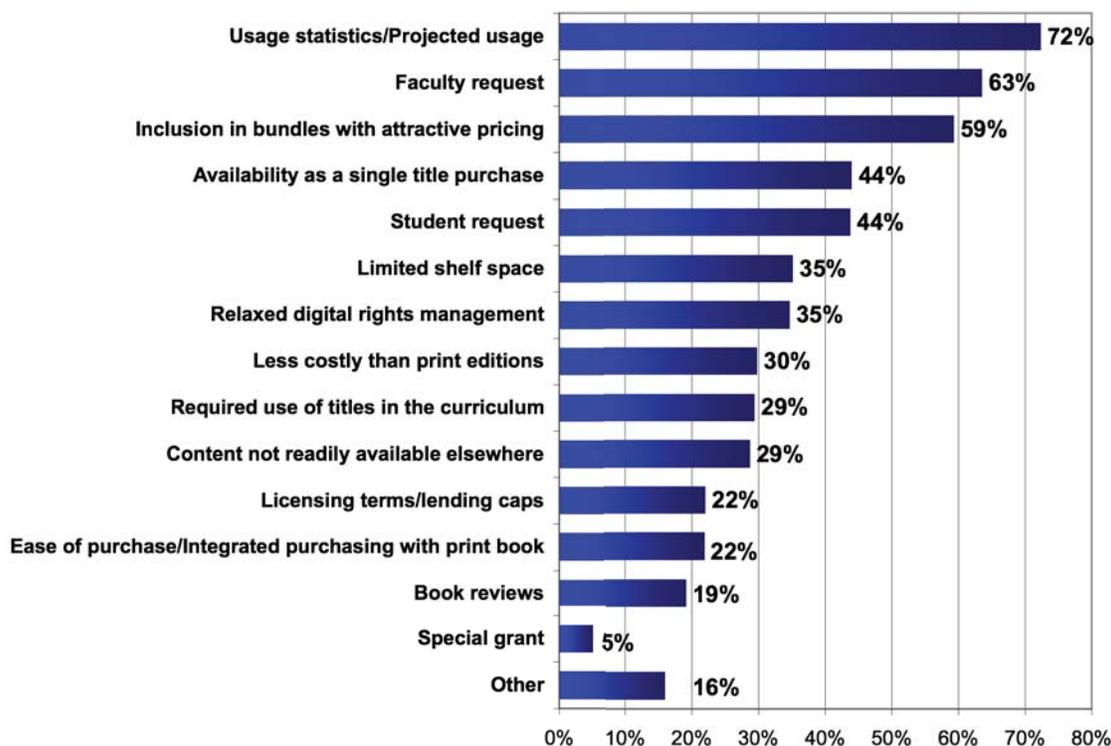
This year, the top influencing factor was "24/7 access," selected by nearly three-fourths (74%) of respondents. "Supports distance learners" was a close second at 72%, and "[allows] multiple users at one time" in third at 70%.

The number one influencing factor on the 2011 survey was "usage statistics/projected usage," then selected by 72% of academic libraries; this year, a slight variant, "projected usage/high demand titles" was only selected by 47%.

**Figure 20. What factors influence your decision to purchase an ebook for your library? (multiple responses permitted)**  
% of academic libraries



**Figure 21. What factors influence your decision to purchase an ebook for your media center? (multiple responses permitted)**  
**% of academic libraries (2011 survey)**



Community colleges are the most likely to select “supports distance learners” (82%), but the least likely to select “faculty request” (41%). In fact, “supports distance learners” is higher than any other response for community colleges suggesting that distance learners are the prime reason they are adopting ebooks.

**Table 16. What factors influence your decision to purchase an ebook for your library? (multiple responses permitted)**  
**% of 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+
<b>2012</b>								
24/7 access	75%	74%	73%	71%	76%	66%	76%	75%
Supports distance learners	71%	70%	82%	77%	66%	79%	72%	67%
Multiple users at one time	75%	73%	50%	71%	68%	63%	64%	87%
Faculty request	68%	64%	41%	60%	62%	47%	72%	58%
Inclusion in bundles with attractive pricing	54%	52%	59%	52%	58%	58%	56%	48%
Cost	49%	58%	45%	53%	55%	58%	55%	50%
Projected usage/High demand titles	53%	47%	32%	48%	48%	45%	45%	54%
Availability as a single title purchase	41%	31%	41%	36%	33%	32%	32%	44%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
Student request	36%	37%	23%	36%	33%	21%	34%	44%
Limited shelf space	41%	33%	18%	29%	38%	16%	36%	42%
Relaxed digital rights management	46%	28%	14%	35%	29%	11%	29%	52%
Required use of titles in the curriculum	37%	25%	23%	31%	27%	32%	24%	38%
Content not readily available elsewhere	34%	27%	14%	26%	31%	13%	27%	40%
Reduces material loss	32%	22%	27%	28%	24%	26%	27%	23%
Licensing terms/lending caps	27%	22%	18%	26%	21%	16%	22%	31%
Book reviews	19%	21%	23%	15%	27%	26%	22%	15%
Ease of purchase/ Integrated purchasing with print book	10%	17%	9%	12%	16%	11%	16%	12%
Other	10%	4%	0%	6%	6%	3%	8%	4%
<b>2011</b>								
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%

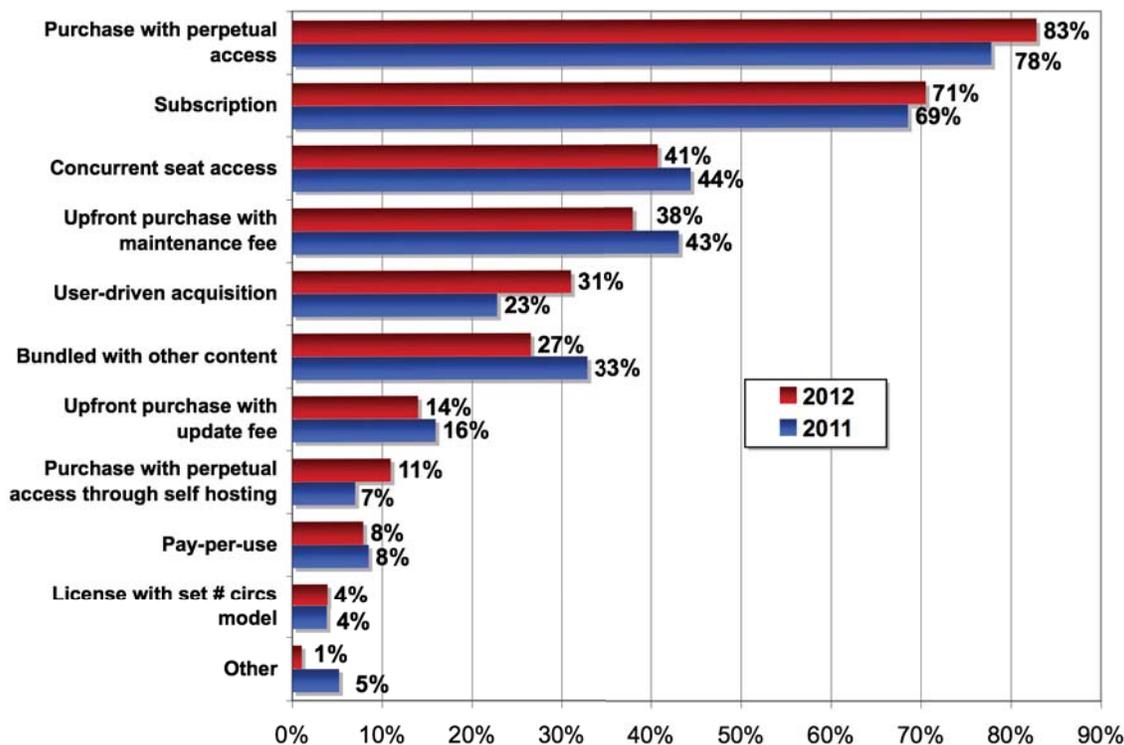
## Ebook Purchasing Terms

When libraries purchase ebooks, more often than not (83% of all respondents, up from 78% last year, and up from 74% in 2010) they purchase “perpetual access.” The second most popular option is “subscription,” selected by 71%, up from 69% last year—this has not changed substantially in the three-year history of our survey.

“User-driven acquisition” (also known variously as “Patron Driven Acquisition” and/or “Demand Driven Acquisition”) is a growing option for many libraries; it is up from 23% last year (and 16% in 2010) to 31% in our current survey. We have a follow-up question about user-driven acquisition below.

Other purchasing terms are declining slightly; “concurrent seat access” dropped a few percentage points to 41% (although it was at 21% in 2010); “upfront purchase with a maintenance fee” dropped five percentage points to 38%, about where it was in 2010; and “bundled with other content” also dipped back to 27%, below the 30% cited in 2010.

**Figure 22. What type of purchasing terms does your library typically use when acquiring ebooks? (multiple responses permitted)**  
 % of academic libraries



The tendency to “purchase with perpetual access” climbs with acquisition budget, and is the preferred (or at least most common) purchasing model among graduate and professional libraries. “Bundled with other content” is also utilized by graduate libraries more than any of the other types of institutions. “User-driven acquisition” has risen considerably among community colleges and undergraduate institutions.

**Table 17. What type of purchasing terms does your library typically use when acquiring ebooks? (multiple responses permitted)**

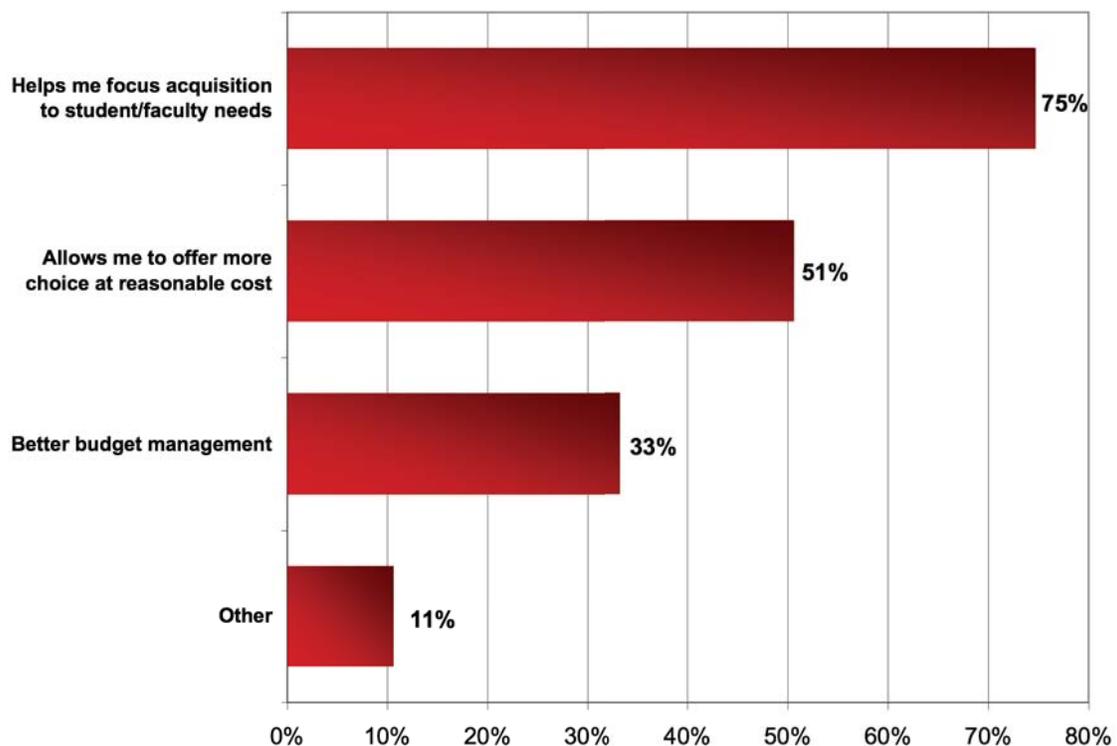
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Purchase with perpetual access	93%	79%	71%	80%	84%	77%	80%	90%
Subscription	79%	66%	63%	75%	64%	62%	73%	70%
Concurrent seat access	51%	40%	21%	42%	37%	31%	35%	60%
Upfront purchase with maintenance fee	51%	34%	21%	34%	40%	31%	33%	50%
User-driven acquisition	37%	30%	21%	35%	25%	18%	27%	48%
Bundled with other content	40%	18%	17%	30%	22%	26%	22%	34%
Upfront purchase with update fee	19%	8%	17%	16%	8%	13%	10%	16%
Purchase with perpetual access through self hosting	18%	2%	17%	13%	5%	10%	7%	12%
Pay-per-use	7%	12%	0%	8%	10%	0%	9%	14%
License with set # circs model	4%	2%	8%	5%	2%	3%	3%	4%
Other	0%	2%	0%	2%	1%	0%	2%	2%
<b>2011</b>								
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%

### User-Driven Acquisition

User-driven acquisition is a means of offering ebooks to library users without an upfront commitment to purchase specific titles. The library creates a bibliography of ebook titles, and the actual purchase is only made when the user accesses a title. In the previous question, we saw that 31% of academic libraries are utilizing this model. The primary advantage, for 75% of libraries who have adopted user-driven acquisition, is that it “helps me focus acquisition to student/faculty needs.” Just over one-half say that it “allows me to offer more choice at a reasonable cost.” And one-third cited “better budget management.”

**Figure 23. What are the benefits of user-driven acquisition? (multiple responses permitted) % of academic libraries that selected “user-driven acquisition” in the previous question**

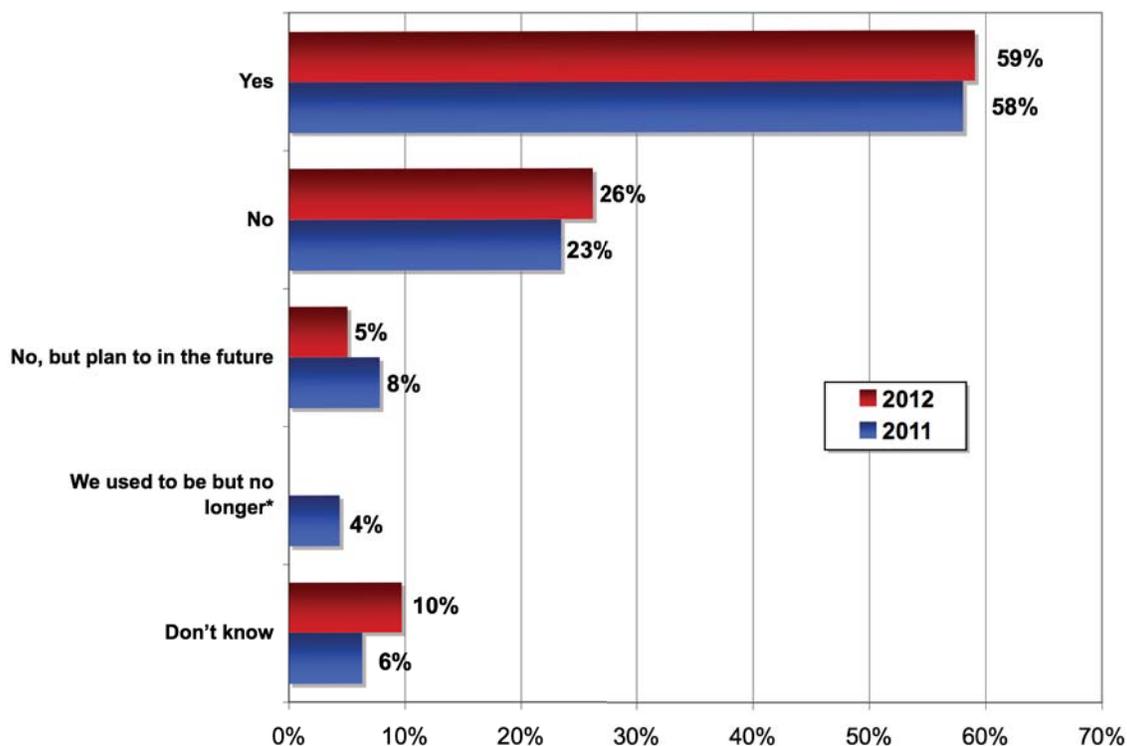


Since this question was only asked of the 31% of respondents who selected “user-driven acquisition” in the previous question, the sample size is too small to make any meaningful cross-tabulations.

## Consortium Program

The percentage of academic libraries belonging to resource-sharing consortia is essentially unchanged from the last survey—just about six out of ten academic libraries are part of a consortium license program. (This is down slightly from 63% in our 2010 survey.) A further 5% plan to join one in the future.

**Figure 24. Is your library part of a consortium license program for its ebook collection?  
% of academic libraries**



\* 2011 survey only.

Last year, we had remarked that consortium membership had decreased for undergraduate 4-year institutions (down from 68% in 2010 to 53% in 2011), although this year they have increased their participation in consortia (back up to 57%). And last year, community college libraries had increased their participation in consortia (from 62% in 2010 to 73% in 2011) but have ebbed back to 63% in 2012.

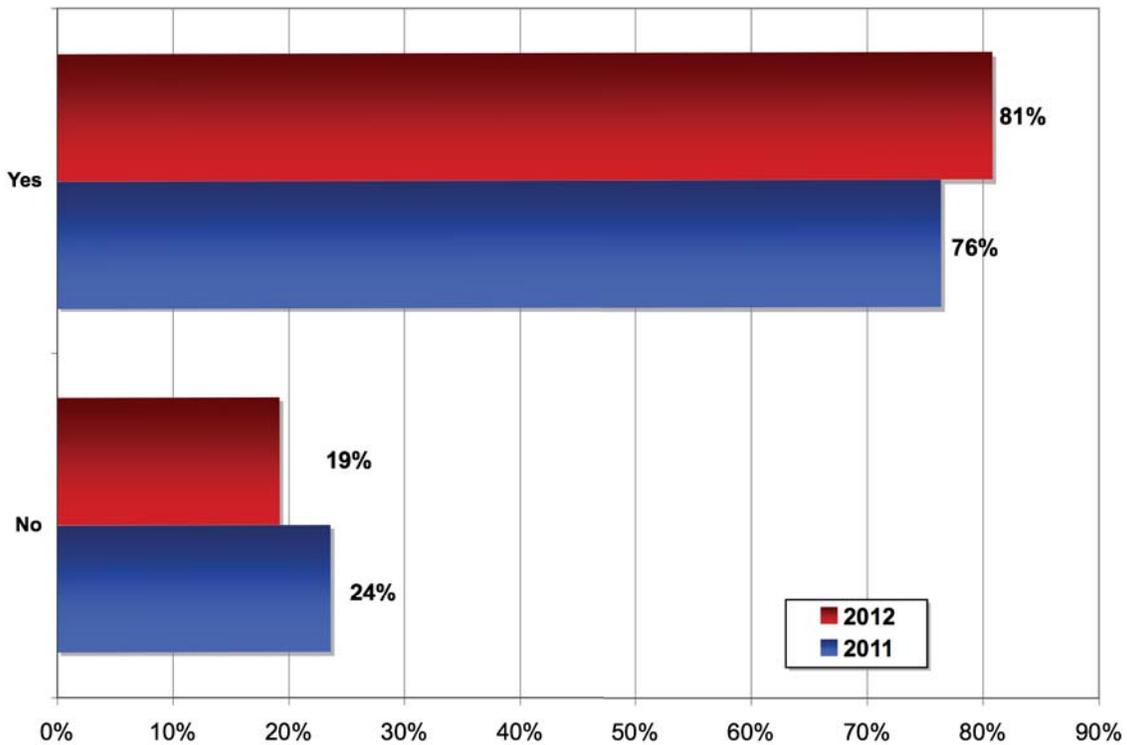
Given that “we used to but no longer” was only at 4%, there doesn’t seem to be any particular animus towards being in a consortium, and—as the next questions demonstrate—nothing is stopping libraries from buying books outside of the consortium. So these ebbs and flows are likely sampling issues as our survey hits different institutions that may or may not have joined a consortium, or are located in regions that lack them.

**Table 18. Is your library part of a consortium license program for its ebook collection?**  
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/Prof	Undergrad	Community College	Public	Private	< \$100K	\$100K-\$999K	\$1 Mil+
<b>2012</b>								
Yes	59%	57%	63%	67%	51%	63%	61%	56%
No, but plan to in the future	5%	5%	4%	5%	5%	3%	5%	8%
No	26%	25%	29%	19%	33%	26%	28%	23%
Don't know	10%	12%	4%	9%	10%	9%	6%	13%
<b>2011</b>								
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%

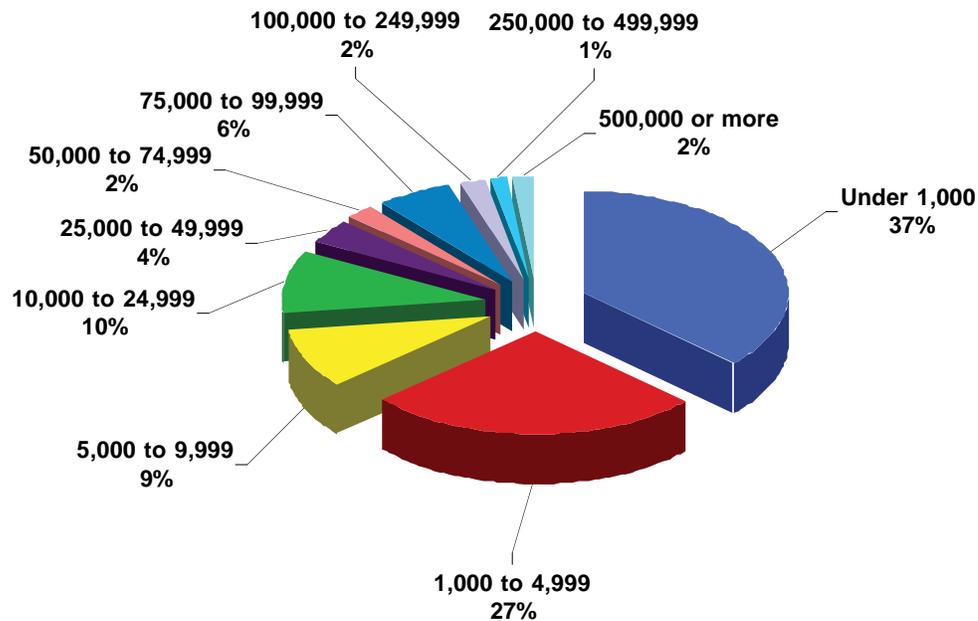
Do consortia members also purchase ebooks independently? This year, more than eight out of ten (81%) academic libraries that are part of a consortium also buy ebooks independently, up a few points from 2011.

**Figure 25. If yes, does your library also buy ebooks independently?**  
**% of academic libraries that are part of a consortium**



In 2012, we included a follow-up question that asked how many ebooks consortium members bought or licensed independently. Academic libraries that are part of a consortium bought or licensed 35,700 ebooks independently<sup>8</sup>, about a third of their average total ebook holdings.

**Figure 26. If part of a consortium, approximately how many ebooks has your library bought or licensed independently?**  
**% of academic libraries that are part of a consortium**

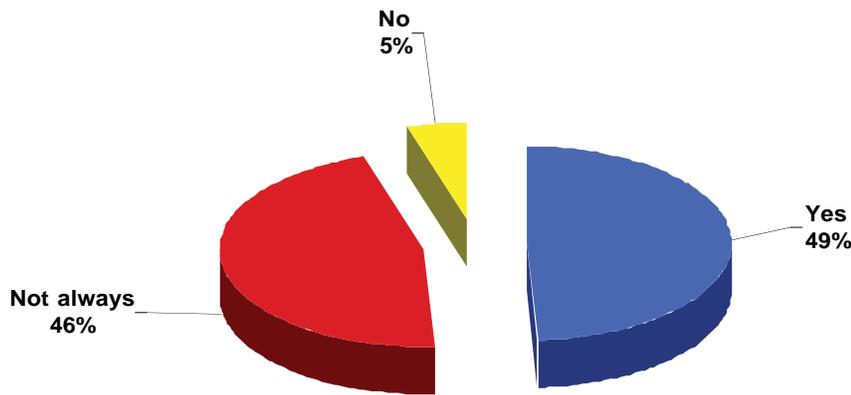


<sup>8</sup> Mean ebooks bought independently: 35,700. Median ebooks bought independently: 2,900.

### Ebook Usage Statistics

Because academic ebooks do not necessarily “circulate” in the traditional way, we added a question in the 2012 survey to learn whether or not libraries are able to track ebook usage statistics. Just about one-half of academic libraries (49%) are in fact able to track ebook usage in their libraries, while another 46% say “not always.” As with so many other aspects of ebooks, the accessibility of usage stats depends on the vendor.

**Figure 27. Is your library able to track usage statistics for ebooks available through vendors or consortia?**  
 % of academic libraries



Community colleges and undergraduate institutions are the most likely to be able to track usage stats for their ebooks—only 38% of graduate/professional libraries report they are definitely able, with another 58% reporting they are “not always” able to track ebook usage.

**Table 19. Is your library able to track usage statistics for ebooks available through vendors or consortia?**  
 % of 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	38%	55%	58%	45%	57%	51%	51%	44%
Not always	58%	40%	36%	51%	37%	38%	45%	56%
No	4%	5%	6%	4%	5%	11%	4%	0%

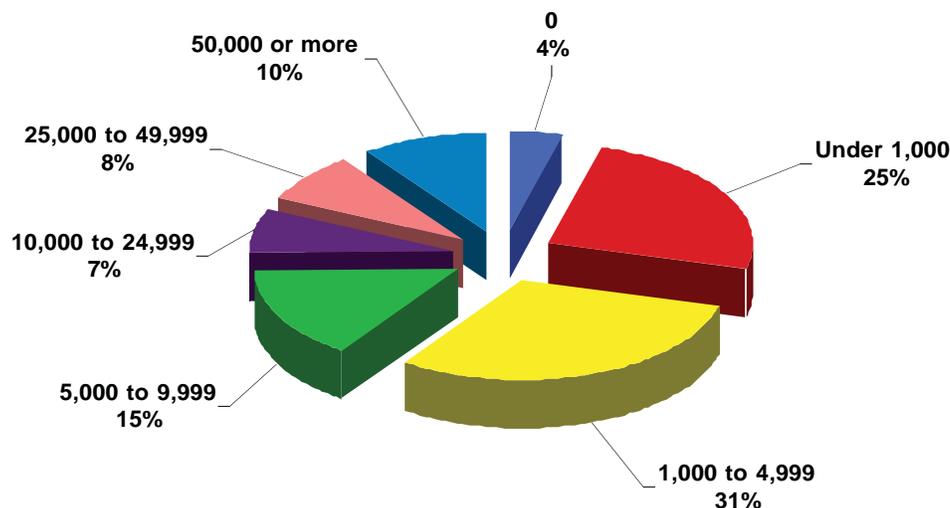
## Ebook Usage/Circulation Trends

### Circulation Figures

We edited the question this year to ask about ebook usage/circulation in an effort to include ebooks viewed online with traditionally circulated ebooks. We found that 43% of total respondents could not answer the question because they had trouble differentiating between number of page views, number of documents accessed or number of ereading sessions by users. This jibes with the large percentage of academic libraries in the previous question conveying that they cannot always track usage statistics. In our 2011 survey, we asked libraries about ebook circulation alone.

In the latest survey, we learned that ebook usage/circulation for the 2010–2011 academic year, on average, was 24,700.<sup>9</sup> This is up considerably from 2009–2010 figures, where academic libraries reported an average ebook circulation of 6,800.<sup>10</sup> However, we need to be careful; in our most recent survey, there was such a vast differential between the mean ebook circulation (24,700) and the median (3,200) that there are likely some outliers that are skewing the average up. Still, even looking at the medians alone (see footnotes on this page) indicates modest increases in ebook circulation.

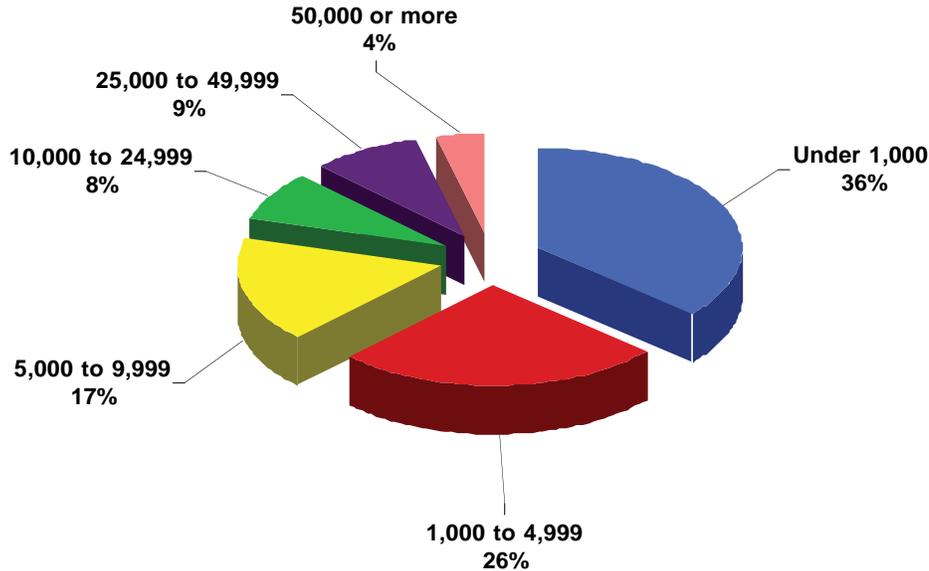
**Figure 28. Approximately what was your total ebook usage/circulation for the last academic year (2010-2011)?**  
% of academic libraries



<sup>9</sup> Mean ebook usage/circulation: 24,700. Median ebook usage/circulation: 3,200.

<sup>10</sup> Mean ebook circulation: 6,849. Median ebook circulation: 2,000.

**Figure 29. What was your ebook circulation in the 2009–2010 academic year?  
% of academic libraries (2011 survey)**



Undergraduate libraries have seen their ebook circulation explode, but given the vast difference between the mean and the median, it seems likely this is due to a few outliers. Still, even looking at the change in the year-over-year median circulation shows that undergraduate ebook circulation is on the rise.

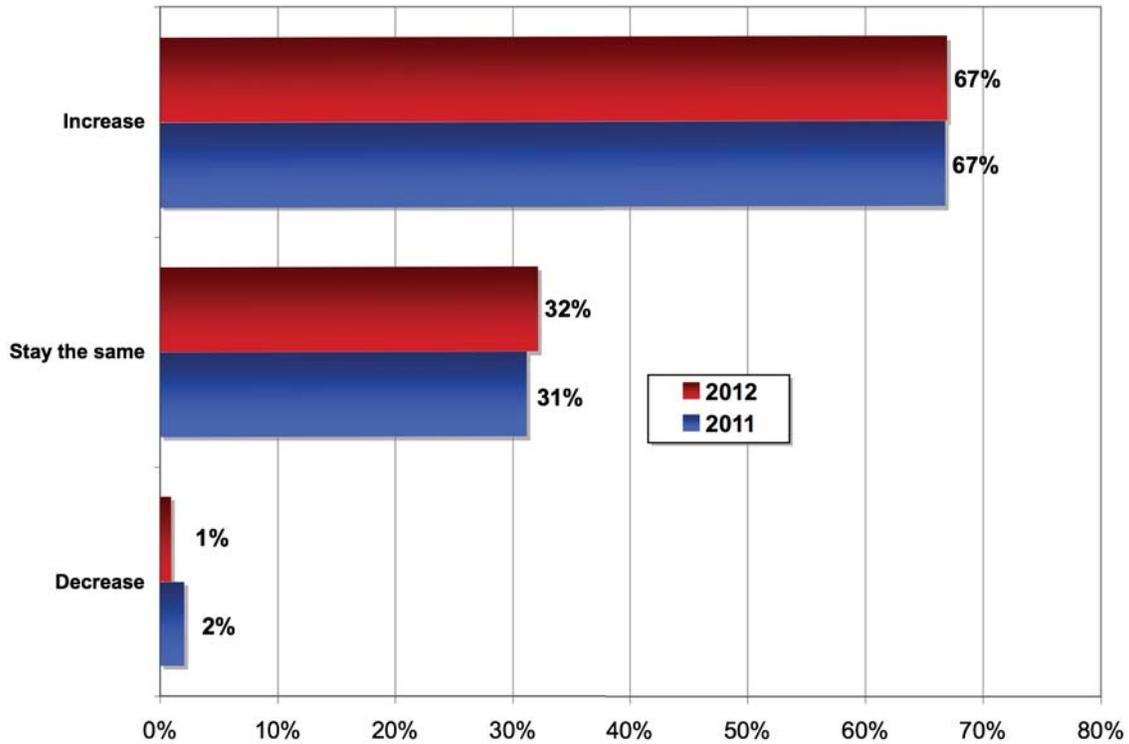
**Table 20. What was your ebook circulation in the 2010–2011 academic years?  
% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012 Survey: 2010-2011 academic year</b>								
0	8%	2%	0%	3%	4%	0%	6%	0%
Under 1,000	29%	18%	33%	11%	35%	29%	26%	12%
1,000 to 4,999	21%	29%	47%	38%	25%	46%	28%	18%
5,000 to 9,999	13%	18%	13%	11%	17%	13%	20%	6%
10,000 to 24,999	8%	10%	0%	8%	8%	4%	6%	18%
25,000 to 49,999	4%	12%	7%	14%	6%	8%	8%	12%
50,000 or more	17%	10%	0%	16%	6%	0%	6%	35%
Mean	35,881	27,550	3,873	28,201	23,534	5,252	21,903	61,900
Median	1,709	5,000	1,800	4,906	2,205	1,660	3,165	15,000
<b>2011 Survey: 2009-2010 academic year</b>								
0	6%	5%	4%	2%	6%	11%	0%	6%
Under 1,000	19%	44%	39%	39%	40%	41%	42%	25%
1,000 to 4,999	19%	32%	35%	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	16,200	4,800	3,200	7,900	4,400	1,900	4,900	17,700
Median	12,500	1,000	1,900	2,400	1,300	820	1,400	4,600

**Ebook Circulation Increasing/Decreasing**

Do academic libraries think ebook circulation will continue to rise? Generally, yes; two-thirds (67%) of academic libraries expect ebook circulation to increase next year, the same number that said yes last year. In our 2010 survey, 77% of respondents had reported that ebook circulation would increase.

**Figure 30. Compared to this school year, do you expect next year’s circulation of ebook titles to increase, stay the same or decrease?  
% of academic libraries**



In addition, we asked our respondents to estimate how much of an increase or decrease in ebook usage they expected. The overall percentage change in circulation expected by libraries declined slightly from +17% last year to +15% this year. In 2010, the overall percentage change expected was +18%. As ebooks have become fully embedded in academic libraries the past several years, it is natural that we are seeing a slowdown in the rate at which circulation is increasing. We expect to see a continued plateauing in our next several surveys.

	2011	2012
Average % increase	25%	22%
Average % decrease	6%	23%
<b>Overall % change expected</b>	<b>+17%</b>	<b>+15%</b>

Community colleges lag slightly behind the other two types of institutions in the voracity of circulation increases they expect. We also see specific outliers who project large decreases in ebook circulation: public undergraduate institutions with acquisition budgets under \$100,000. It could be they are slowing down or discontinuing their ebook program for lack of funding.

**Table 21. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?**

**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
<b>2012</b>								
Increase	65%	75%	53%	64%	74%	60%	69%	75%
Less than 10%	21%	27%	20%	23%	25%	14%	26%	29%
10% to 24%	45%	41%	53%	43%	44%	46%	43%	42%
25% to 49%	24%	23%	13%	23%	23%	25%	21%	25%
50% to 74%	14%	9%	7%	11%	8%	18%	9%	4%
75% to 99%	0%	0%	7%	2%	0%	0%	2%	0%
100% or more	0%	2%	0%	0%	2%	0%	2%	0%
Average % increase	21%	24%	21%	20%	24%	22%	25%	18%
Stay the same	34%	24%	47%	35%	25%	38%	30%	25%
Decrease	1%	1%	0%	1%	1%	2%	1%	0%
Average % decrease	5%	50%	0%	50%	5%	50%	5%	0%
Overall % change	14%	17%	11%	12%	18%	12%	17%	13%
<b>2011</b>								
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 % change	18%	18%	13%	15%	19%	11%	18%	19%

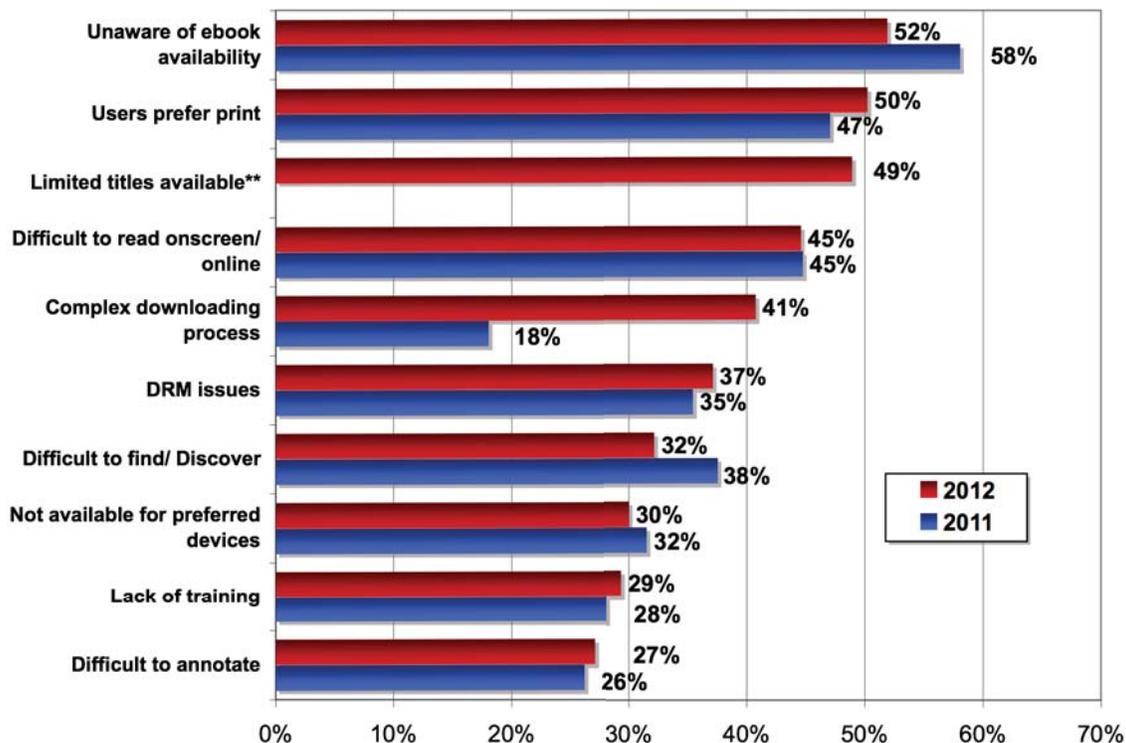
## Barriers to Ebook Consumption

In the chart below, we present the top ten barriers that prevent library users from accessing and reading a library's ebook content. "Unaware of ebook availability" tops the list, but on the plus side is at an all-time low (52%, down from 58% last year and 62% in 2010). "Users prefer print" remains a barrier for 50% of libraries, which continues its climb, from 47% in 2011 and from 40% back in 2010. "Limited titles available," new to this year's list of choices, was cited by roughly half (49%) of all academic libraries. A paucity of titles is one of librarians' chief complaints vis-à-vis ebooks.

A large jump occurred for "complex downloading process" from 18% last year to 41% this year (And 14% in 2010). The respondent comments presented throughout this report suggest that vendors have made it more difficult for users to access ebook content.

"Digital rights management (DRM) issues" is up two percentage points to 37%, but is still lower than the 55% cited in 2010.

**Figure 31. What hinders students/faculty from reading your library's ebook content? (multiple responses permitted) (Top 10 responses)**  
% of academic libraries



\*\*Added to 2012 survey.

Community colleges remain the most likely to cite "unaware of ebook availability" (67%) and undergraduate institutions are the most likely to say that their "users prefer print" (56%). Graduate/professional institutions in particular wrestle with "DRM issues" (49%).

**Table 22. What hinders students/faculty from reading your library's ebook content? (multiple responses permitted)****% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Unaware of ebook availability	43%	54%	67%	52%	51%	55%	53%	46%
Users prefer print	47%	56%	43%	43%	58%	57%	54%	39%
Limited titles available	51%	45%	53%	53%	43%	52%	47%	49%
Difficult to read onscreen/ online	42%	46%	47%	48%	42%	36%	50%	41%
Complex downloading process	43%	42%	33%	37%	44%	30%	42%	47%
Digital rights management issues	49%	34%	20%	42%	31%	25%	37%	51%
Difficult to find/ Discover	35%	28%	37%	31%	31%	32%	33%	29%
Not available for preferred devices	38%	24%	27%	33%	26%	18%	32%	37%
Lack of training	24%	29%	43%	31%	26%	36%	26%	24%
Difficult to annotate	38%	25%	10%	24%	30%	25%	23%	36%
In demand titles not available for libraries	29%	17%	27%	20%	23%	11%	26%	24%
Ebook titles not available concurrent with print release	33%	12%	13%	22%	16%	11%	18%	29%
Limited access to ereading devices	13%	21%	27%	23%	18%	21%	19%	17%
Faculty resistance	17%	21%	13%	17%	19%	14%	24%	15%
Long wait times for ebooks	10%	5%	10%	10%	6%	4%	6%	14%
Not downloadable	3%	2%	0%	3%	1%	4%	0%	3%
Limited concurrent users	3%	1%	0%	2%	1%	0%	0%	5%
Printing limitations	1%	1%	0%	1%	1%	0%	1%	2%
Other	1%	3%	7%	1%	5%	5%	3%	0%
None of the above	3%	1%	0%	1%	2%	0%	2%	2%
<b>2011</b>								
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%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
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%

## General Conclusions

We mentioned distance learners in previous sections of this report, and here we find that they are one of the big drivers of growth in ebook acquisition by academic libraries. Other top reasons cited for acquiring ebooks is “24/7 access” and “supports multiple users.” Both of these other reasons are also descriptive of—but admittedly not limited to—distance learning students. A detailed look at the growth of distance learning programs in academic institutions is beyond the scope of the present report, but both schools and students realize substantial benefits in these programs. That is, as long as academic materials can be accessed remotely.

Licensing terms of ebooks are a traditional bugaboo for libraries of all kinds, but “perpetual access” seems to be the default option for most libraries. User-driven acquisition is a cost-effective option, and we will keep tabs on this in future surveys.

Ebook circulation is up threefold from last year, especially among undergraduate institutions. Librarians predict demand will continue to increase, but not as strikingly as in the past..

Substantial barriers to ebook consumption remain; limited title availability and complex downloading processes are significant hurdles for all involved. The fact that many academic library users still prefer print is quite telling.

## In Their Own Words...

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

- Backlist titles should definitely reflect price reductions.
- Because book vendors are not having to pay for storage or printing costs of ebooks, they should be cheaper.
- Discounts are typically on older editions, not the most current
- E-books should be less expensive. They save the vendors money or should over time. If the e-book model is to become more dominant, there needs to be more of an incentive to purchase.
- Ebrary has poor customer service
- It seems that pricing is all over the map with some publishers charging a premium for an online version of their book and others a discount. Not unlike what we went through with the switch from print to online journals.
- Like everything else about ebooks pricing varies wildly.
- Okay with ebooks having the same price as print; would prefer lower price for ebooks since print costs more to produce.
- Prices for single-user runs about the same as print, which is fine. We generally pay 1.5X for the multiple user, which is a good price also, though we are finding we have almost no turnaways and are considering purchasing more single-user titles.
- Pricing has been disappointing considering that publishers aren't producing and shipping physical volumes.
- Since editorial costs should be spread over both print and etitles, not sure why not better discounts.
- Some packages are a great deal; individually-purchased titles are quite expensive.
- Some vendors charge more for e-books.
- Some vendors charge outrageous annual fees which prevent us from getting a handful of titles that we're interested in. Most of the discounts models are a joke anyway.
- The pricing model still doesn't make sense. Why aren't annual ebooks offered with a low cost standing-order model—e.g. providing access to the past 5 years without requiring continued purchasing and withdrawal procedures?
- Vendor often charges full hardback price for the ebook even when paperback ed. is widely available. Some publishers (are you listening, Routledge?) charge more than the hardback price.

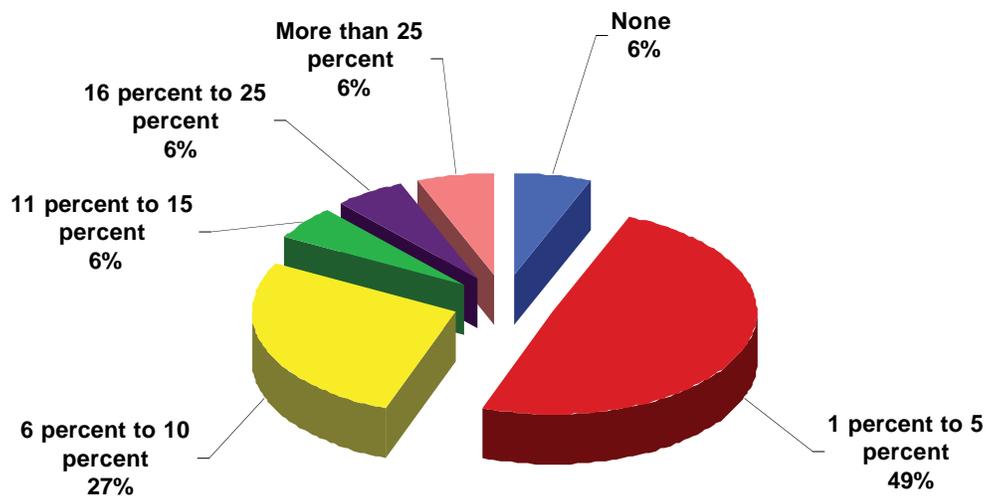
- We do not receive discount from aggregator vendor, as we do when ordering print. From publishers direct, discount for backfiles is decent, but for frontlist not much discount, unless we go via a consortium and buy all content from the publisher.
- We don't get discounts. We get most of our ebooks through subscription collection purchase, i.e., Ebrary. This yields a low cost per title, but we have no control over the content that is added to our collection. Many highly desired titles are not available by subscription and the collection includes many low value, low quality titles that we would never acquire independently.
- We don't receive discounts most of the time. Sometimes there are small sales, but most of the time we pay the listed library price (which is significantly higher).
- We frequently do not receive discounts off list for ebooks. The print version may be less expensive.
- We haven't been in the market for them, so I don't have an opinion. In the past we had some NetLibrary titles and they were unsatisfactory on just about every measure.
- When I purchased a collection a few years ago, the titles were already 2–3 years old. In an academic setting, especially as information in business, nursing, education and technology change so quickly.

## 4. EBOOKS AND ACQUISITION BUDGETS

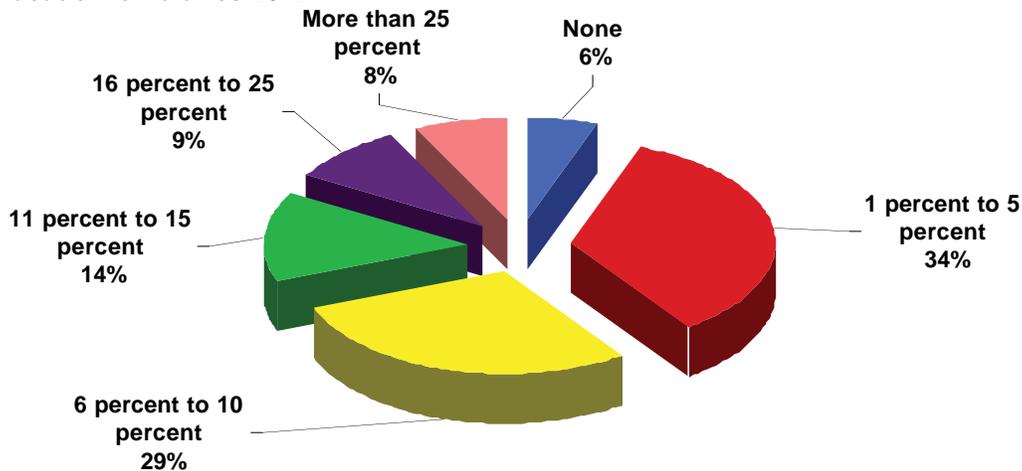
### Ebooks in the Budget

Ebooks continue to account for a greater and greater share of academic libraries' acquisitions budgets. Our 2012 respondents estimated that last year, ebooks comprised, on average, about 7% of their library's acquisitions budget.<sup>11</sup> Compare that to this year, where the same libraries said that ebooks accounted for, on average, almost 10% of the acquisition budget.<sup>12</sup>

**Figure 32. What % of your library's acquisitions budget did ebooks last year represent?**  
% of academic libraries 2012



**Figure 33. What % of your library's acquisitions budget do ebooks currently represent?**  
% of academic libraries 2012



<sup>11</sup> Mean acquisition budget % (last year): 7.5%. Median acquisition budget % (last year): 4.5%.

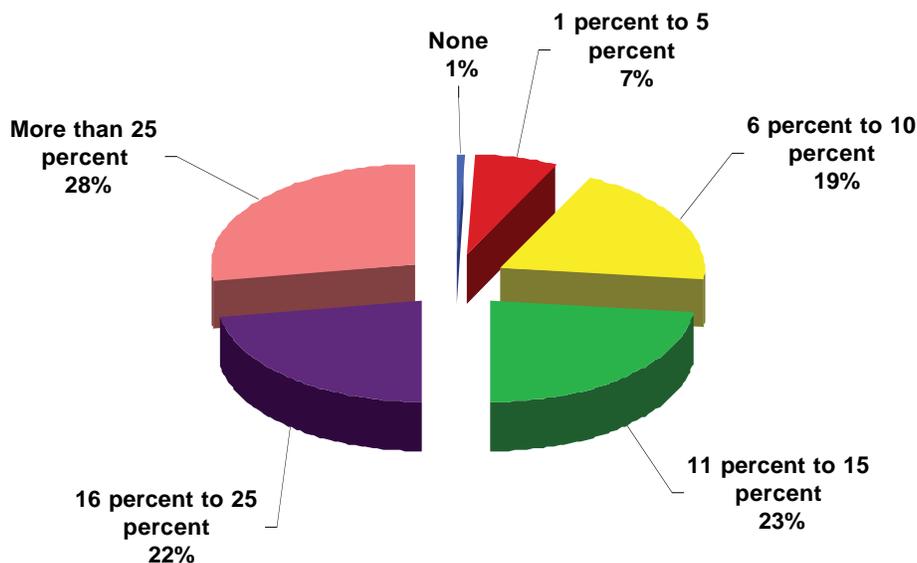
<sup>12</sup> Mean acquisition budget % (this year): 9.6%. Median acquisition budget % (this year): 7.4%.

On average, academic libraries predict that ebooks will represent 18.5% of their acquisition budget in five years (2017).<sup>13</sup> In last year's survey, academic librarians expected ebooks to account for 19.1% of the total acquisition budget in 2016.<sup>14</sup> In our 2010 survey, librarians felt that ebooks would represent 18.0% of their acquisitions budget five years hence (in 2015).

Over a quarter (28%) of respondents predicted that ebooks will represent more than 25 percent of their acquisition budget in five years (although this is down from the 35% who said this last year, and even the 31% who said this in 2010). Another 22% (down from 33% in 2011 and 30% in 2010) expect ebooks to account for 11 to 25 percent of their overall acquisition budget.

So in our present survey, academic librarians are tempering their expectations of the large role ebooks will play in future budgets. This is logical; much of the expense for libraries over the past several years has been the acquisition of backlist and older titles. Future spending on these legacy titles and materials will likely decline, as libraries only need to keep up with new titles being released, as well as updates to reference titles and e textbooks.

**Figure 34. What percentage of your library's acquisitions budget do you predict ebooks will represent in 5 years?  
% of academic libraries**



<sup>13</sup> Mean % of acquisition budget: 18.5%. Median % of acquisition budget: 15.0%.

<sup>14</sup> Mean % of acquisition budget: 19.1%. Median % of acquisition budget: 18.5%.

The following table breaks down expected spending on ebooks by type of institution and acquisition budget for last year, this year, and five years hence. All three institution types have upped the percentage of their budget spent on ebooks, with graduate/professional institutions saying that, on average, ebooks account for just about 10% of the overall acquisition budget this year.

Future expectations are far more moderate in this year's survey. Last year, we reported that fully 40% of graduate/professional libraries had expected to spend more than one-quarter of their acquisition budget on ebooks. These folks have reconsidered their bullishness on ebooks and now only 24% expect ebooks to account for such a large chunk of their budget. Community colleges, likewise, had high expectations for ebook spending: last year, 38% had estimated that ebooks would account for more than one-quarter of their budgets, while now only 23% do.

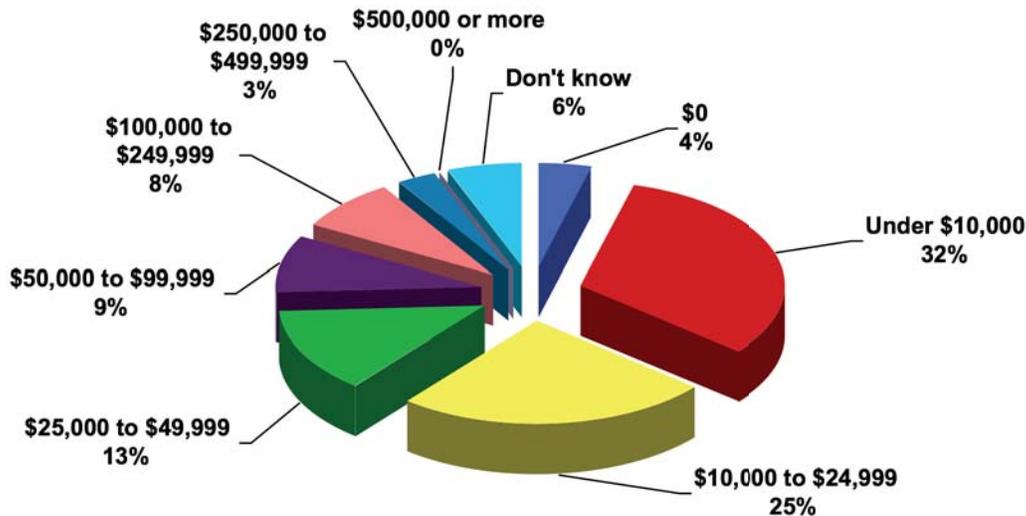
**Table 23. What percentage of your library's acquisitions budget do ebooks represent last year, this year, and what do you expect them to represent in five years?  
% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof'l	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>Last Year</b>								
None	5%	7%	5%	3%	11%	9%	8%	2%
1 percent to 5 percent	53%	49%	45%	51%	46%	36%	46%	63%
6 percent to 10 percent	27%	24%	32%	29%	23%	21%	30%	23%
11 percent to 15 percent	4%	9%	5%	8%	5%	6%	7%	7%
16 percent to 25 percent	4%	9%	5%	5%	7%	9%	7%	2%
More than 25 percent	7%	3%	9%	4%	8%	18%	3%	2%
Mean %	7.4	7.2	8.4	7.4	8.0	11.4	6.9	5.9
Median %	4.4	4.5	5.5	4.7	4.4	6.9	4.6	4.0
<b>This Year</b>								
None	4%	6%	9%	4%	8%	12%	5%	2%
1 percent to 5 percent	38%	37%	23%	33%	36%	18%	41%	37%
6 percent to 10 percent	24%	29%	41%	32%	24%	27%	24%	35%
11 percent to 15 percent	18%	13%	9%	16%	12%	9%	16%	16%
16 percent to 25 percent	7%	9%	14%	10%	8%	15%	8%	5%
More than 25 percent	9%	7%	5%	5%	11%	18%	5%	5%
Mean %	9.9	9.2	9.5	9.5	9.9	13.0	8.8	8.6
Median %	7.4	7.0	7.8	7.7	6.9	8.9	6.7	7.2
<b>In Five Years</b>								
None	0%	1%	0%	0%	1%	0%	1%	0%
1 percent to 5 percent	9%	3%	9%	8%	4%	9%	4%	7%
6 percent to 10 percent	22%	20%	14%	14%	24%	15%	18%	26%
11 percent to 15 percent	22%	23%	27%	27%	18%	18%	24%	23%
16 percent to 25 percent	24%	19%	27%	29%	15%	18%	23%	23%
More than 25 percent	24%	34%	23%	22%	38%	39%	30%	21%
Mean %	17.5	19.7	18.0	18.1	19.8	20.5	19.2	17.0
Median %	14.5	17.4	15.5	16.2	17.6	19.8	17.1	14.0

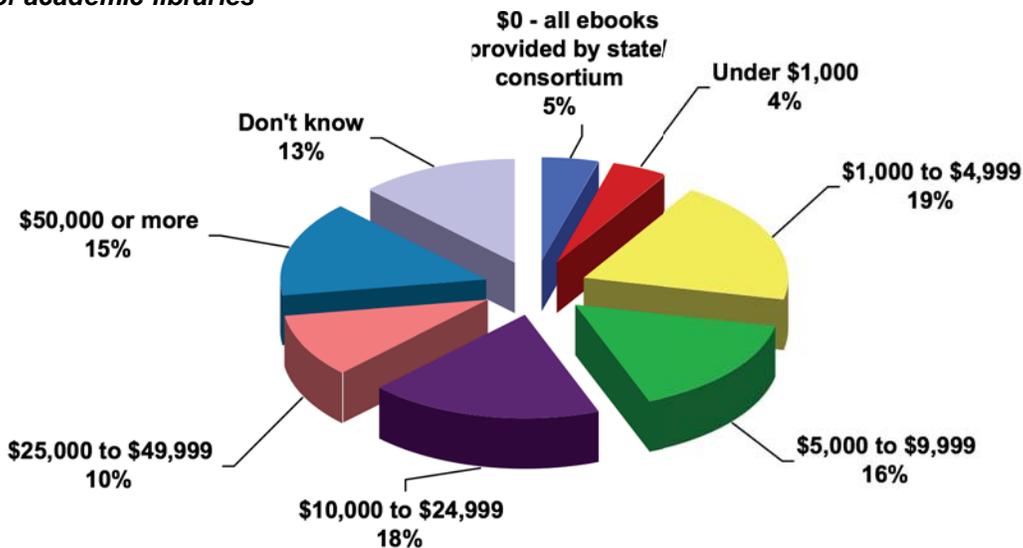
### Spending On Ebooks

When asked how much money academic libraries spent on ebooks during the academic year, we found that spending went up slightly, but not dramatically. For the 2011–2012 academic year, libraries spent an average of \$67,400 on ebooks.<sup>15</sup> In last year’s survey, average ebook spending was a bit lower at \$65,000.<sup>16</sup> Last year, we found that one-fourth of libraries spent \$25,000 or more on ebooks in their last academic year; and this year 33% of libraries spent in excess of \$25,000 on ebooks. (Note that we changed the spending ranges in our 2012 survey.)

**Figure 35. Approximately how much would you estimate your library spent on ebooks during the current (2011–2012) academic year?**  
 % of academic libraries



**Figure 36. Approximately how much would you estimate your library spent on ebooks during the current (2010–2011) academic year? (2011 survey)**  
 % of academic libraries



<sup>15</sup> 2011-2012 mean spending on ebooks: \$67,400. Median spending on ebooks: \$16,600.

<sup>16</sup> 2010-2011 mean spending on ebooks: \$65,000. Median spending on ebooks: \$17,500.

Focusing on medians might give a more reliable picture of spending on ebooks. Outliers make the means considerably higher than medians for this question.

**Table 24. Approximately how much would you estimate your library spent on ebooks during the current academic year?**

*% of academic libraries by type of institution and acquisition budget*

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/Prof	Under-grad	Com-munity College	Public	Private	< \$100K	\$100K–\$999K	\$1 Mil+
<b>2012</b>								
\$0	3%	5%	4%	1%	8%	13%	4%	0%
Under \$10,000	19%	34%	57%	27%	36%	44%	38%	10%
\$10,000 to \$24,999	21%	24%	35%	22%	27%	31%	27%	16%
\$25,000 to \$49,999	12%	20%	0%	19%	9%	8%	16%	16%
\$50,000 to \$99,999	16%	7%	0%	8%	8%	3%	8%	14%
\$100,000 to \$249,999	17%	2%	0%	12%	2%	0%	1%	22%
\$250,000 to \$499,999	7%	1%	0%	4%	2%	0%	0%	10%
\$500,000 or more	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	5%	7%	4%	7%	6%	3%	6%	12%
Mean \$	99,900	42,600	15,600	77,400	47,500	18,900	33,900	122,200
Median \$	33,900	15,000	7,800	22,200	11,300	8,300	13,200	57,100
<b>2011</b>								
\$0 – all ebooks provided by state/consortium	3%	4%	9%	4%	5%	11%	4%	0%
Under \$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

Given how long academic libraries have been acquiring ebooks (in all their myriad forms and formats) we should not be too surprised that spending on ebooks, and the overall percentage of the acquisition budget represented by ebooks, should only be rising modestly. Academic libraries for the most part have already “built out” their collections, so additional spending is likely to be only incremental at this stage.

One issue that may affect spending and budgeting of ebooks is the cost of ebooks. Many librarians have expressed the concern that the prices of ebooks have increased—in some cases dramatically—in the past year.<sup>17</sup> Naturally, this increases overall spending on ebooks, and, ergo, the percentage of the budget that

<sup>17</sup> Random House in particular has raised the cost of their ebooks substantially and, for some libraries, prohibitively.

ebooks represent, without necessarily indicating that libraries are buying any more ebooks than they had been, just that they're more expensive.

It also bears mentioning—and this is a bigger issue for public libraries that handle a larger percentage of mainstream titles—that very often an ebook costs the same as, or even more than, its corresponding print edition. When you think about this in the context of “users preferring print” increasing as a barrier to ebook consumption, one can't help but wonder if at some point the cost and complexity of ebooks will trump the ease of use in research and academic study. We're not expecting that to happen, but as we say every year in these studies, ebooks are a robust growth area for libraries, but there remains a certain unease. Any technology can be abandoned quite readily, as the examples of 8-track tapes, cassette tapes, floppy disks, VHS tapes, vinyl records, and likely, CDs and DVDs all too readily point out.

### **In Their Own Words...**

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

- Search capability is extremely important. Strictly keyword doesn't cut it. Phrase searching and Boolean very important.
- Some users are still resistant—prefer print—some find the interface too much of a hassle. I wish there were a single system that applied to all ebooks, or one that was easier for patrons to figure out. It is hard for librarians, too, because of the constant change and multiple interfaces to learn and re-learn, then teach patrons. They don't always work as they are supposed to, possibly due to local settings, proxy issues, etc.
- Strangely, our users are not that interested in e-books. When we offer titles in e-format, we are asked when the print book will be in and vice versa.
- Students are using them. Distance students find them very helpful. “Real” books continue to be most sought and used.
- The ability for students to download easily is absolutely key to the product's value. In all cases except for Ebrary, we've stopped buying ebooks that are difficult to access. Also, we have had some issues with visually impaired students accessing ebooks, particularly Ebrary.
- The ability to view both on the computer and download to digital device, and multiple simultaneous viewing of a single title are both very good with our Ebrary package.
- The ebooks are hard on the eyes of most of the students, and it is much faster for them to read a book which is on the shelf or available through interlibrary loan.
- There are positive (24/7 access, etc.) and negatives (does anyone actually read academic ebooks?). The process of removing outdated materials is

cumbersome (remove from vendor, remove from catalog, remove from OCLC). They're invisible and I worry about that. What are we losing?

- They are great for just-in-time use, but the variety of platforms and devices make their use complicated...how many people can't use a print book?!
- Until we have demand and until we see a market that offers us the durability, usability, and lending terms that are similar to print, we're not in any rush to acquire ebooks. I suspect the JSTOR offerings will be the most tempting option we've seen yet, if rumors about how it will work prove true.
- Use slowed last year, we don't have a full picture of use this year. Prices too high with few if any discounts.
- We are currently doing usability testing on how our ebooks are displayed in the OPAC.
- We are finally breaking the print barrier and plan to purchase ebooks with greater regularity.
- We are having issues with the ebooks not being able to easily transfer to an ereader device like the Kindle or Nook. The process is way too complicated.
- We are new to the ebook landscape, and have trouble finding materials for our largest subjects (we are a theological library). We are actively seeking new access and delivery models, so these answers might be significantly different even next year.
- We currently have on trial Ebrary and just subscribed to Gale Virtual Reference Library. We have trialed other ebook collections such as Reference Universe. As the only laptop university in our state all undergraduates and most graduate students (9,000+ students) have access to their own laptops and can access any of our library ebooks both on and off campus. Although we are looking into devices and/or software such as Overdrive we have not ventured into this area yet.
- We don't have a large number of ebooks, and haven't seen a lot of demand for it either.
- We have about equal amounts of print and e- , and we are pretty satisfied. The vast majority, probably 99.5% or more, are purchased or licensed annually as part of a large package, either through an aggregator (Ebrary) or from the publisher (Springer).
- We have an old collection that we purchased as a package several years ago. The quality was not what we expected, and we have not made any ebook purchases since then. We expect to resume collecting ebooks in the near future.
- We have ebooks and they are being used, but the collection is out of date.

- We have only a small percentage that can be downloaded. And a smaller percentage that can be downloaded to a device. Also, the downloading process is, in many instances, too complicated.
- We just started them and it is almost like individual training even though we have sent email, publicized, and have book marks, if doesn't come up in conversation or in reference interview or chance meeting the word doesn't get out.
- We need help promoting them and making them easily findable/accessible.
- We need one book-one user cheapest resources. Disappointed with Safari 50 books and 2 users pilot.
- We only have NetLibrary collections which aren't tailored to our curriculum.
- We promote and promote yet faculty and students alike claim they don't know we have ebooks.
- We seem to be a print-based institution except for e-journals
- We thought they would find a wider audience, especially with an increase in the number of online courses and programs, but so far that hasn't happened. We do know we have to increase our marketing of the service, and once we implement EZProxy, usage should increase.
- We would like to purchase more ebooks, but the number of options and choices available means that we have to devote too much of our very limited staff time to the decision-making process.
- We're still in the early stages of ebook purchasing. Our individual title purchases via EBSCO ebooks will be launched this fall.
- We've had so many complaints about problems with ebooks that I think users are turned off and won't try them because of old problems. There need to be dramatic fixes and rollouts of serious across-the-board changes to get users on board with them again if we want to increase use. We still get requests for print copies only because they're such a pain to use—from people who are plenty tech-savvy. It's a problem with the ebook, *not* the user.
- When we compared the ebook titles (by patron-driven model) with our print titles, we found a large number of duplicates.
- While some people will use ebooks and like the fact that they can access them from home, without having to visit the library, I don't encounter many users who actually like reading ebooks. When helping individual patrons, I often get the question, "don't you have any real books" (meaning print books)? While an increasing number of our students and faculty carry personal laptops and smart phones, I see very few iPads, Kindles, Nooks, or other e-reader devices on our campus at this time.

Most of the iPads that I see on campus have been purchased through grant programs and are being used experimentally by faculty at this point. Students and faculty do not request titles in e-book format. At this point, the library is basically forcing ebooks on the campus, and it is hurting the library because our users feel that we don't have the books that they want, so they go elsewhere.

## 5. LIBRARIES AND EBOOK VENDORS

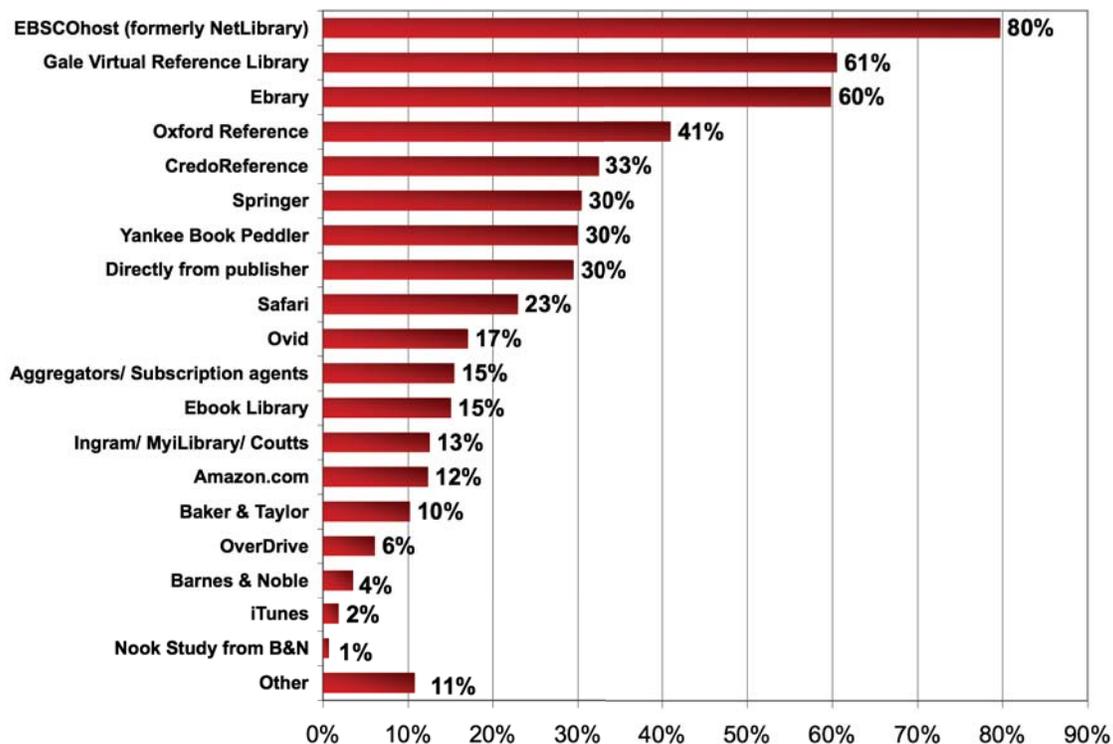
In this section, we look at the vendors that academic libraries patronize, those that they prefer, and what ebook attributes are of the most importance to libraries.

### Vendors Used

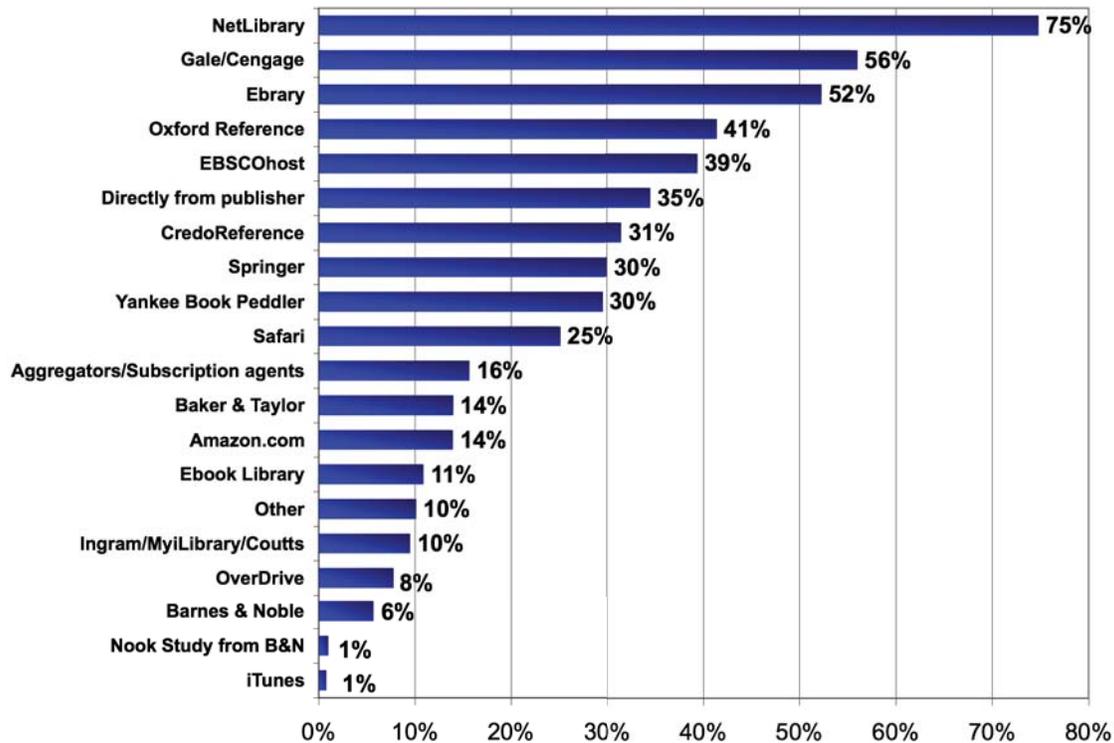
EBSCOhost (which acquired NetLibrary in 2011) is the top vendor employed by academic libraries for ebooks; 80% buy through EBSCOhost (last year, 75% bought through NetLibrary and 39% had bought through EBSCOhost). A somewhat distant second is Gale Virtual Reference Library at 61% (last year, 56% elected Gale/Cengage), followed by Ebrary (56%, up from 52%). A smaller percentage (30%, down from 35%) of academic libraries buy ebooks directly from the publisher. (For clarity, we only included 2012 survey data in Figure 37; 2011 data is in Figure 38.)

**Figure 37. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)**

*% of academic libraries*



**Figure 38. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)**  
**% of academic libraries (2011 survey)**



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:

- EBSCOhost (80%)
- Ebrary (66%)
- Gale Virtual Reference Library (61%)

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

- EBSCOhost (80%)
- Gale Virtual Reference Library (63%)
- Ebrary (62%)

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

- EBSCOhost (77%)
- Gale Virtual Reference Library (55%)
- Ebrary and CredoReference (both at 41%)

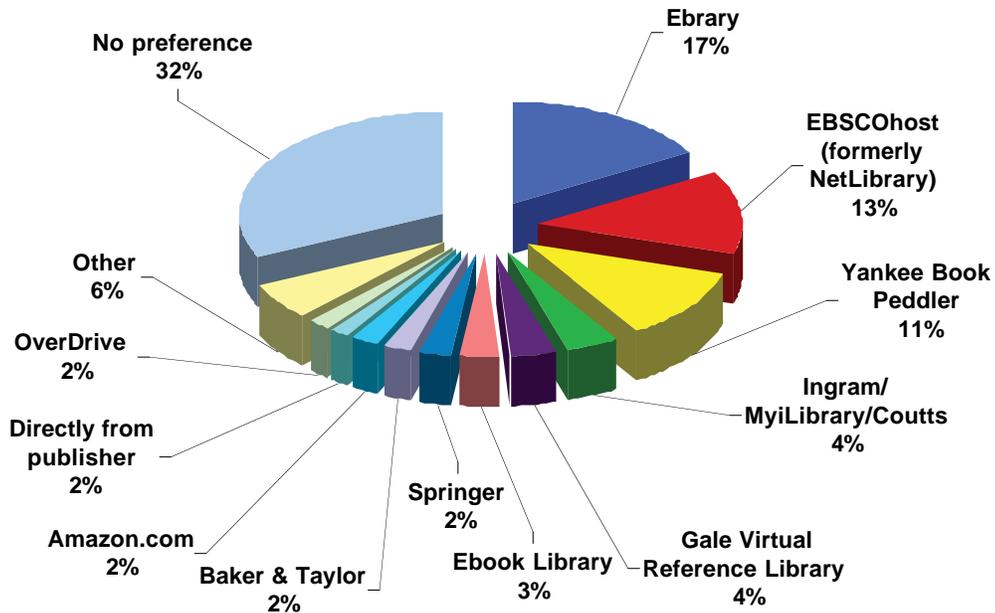
**Table 25. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)****% academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
EBSCOhost	80%	80%	77%	80%	77%	81%	80%	76%
Gale Virtual Reference Library	61%	63%	55%	66%	52%	46%	64%	63%
Ebrary	66%	62%	41%	60%	59%	54%	57%	71%
Oxford Reference	50%	43%	18%	40%	40%	19%	46%	49%
CredoReference	23%	38%	41%	33%	35%	35%	39%	20%
Springer	52%	20%	9%	42%	14%	11%	19%	59%
Yankee Book Peddler	48%	22%	9%	31%	25%	16%	24%	47%
Directly from publisher	45%	18%	23%	33%	20%	19%	24%	39%
Safari	36%	15%	14%	31%	12%	11%	13%	47%
Ovid	27%	11%	9%	18%	12%	8%	10%	33%
Aggregators/ Subscription agents	21%	13%	9%	18%	11%	16%	13%	16%
Ebook Library	25%	10%	5%	14%	14%	11%	11%	22%
Ingram/MyiLibrary/Coutts	20%	9%	5%	12%	12%	8%	7%	24%
Amazon.com	14%	14%	5%	11%	16%	22%	11%	10%
Baker & Taylor	11%	10%	9%	7%	13%	8%	12%	8%
OverDrive	4%	9%	5%	8%	5%	8%	7%	4%
Barnes & Noble	5%	3%	0%	4%	4%	3%	4%	4%
iTunes	0%	2%	5%	2%	2%	3%	2%	2%
Nook Study from B&N	2%	0%	0%	1%	0%	0%	0%	2%
Other	13%	14%	0%	10%	13%	11%	12%	12%
<b>2011</b>								
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%

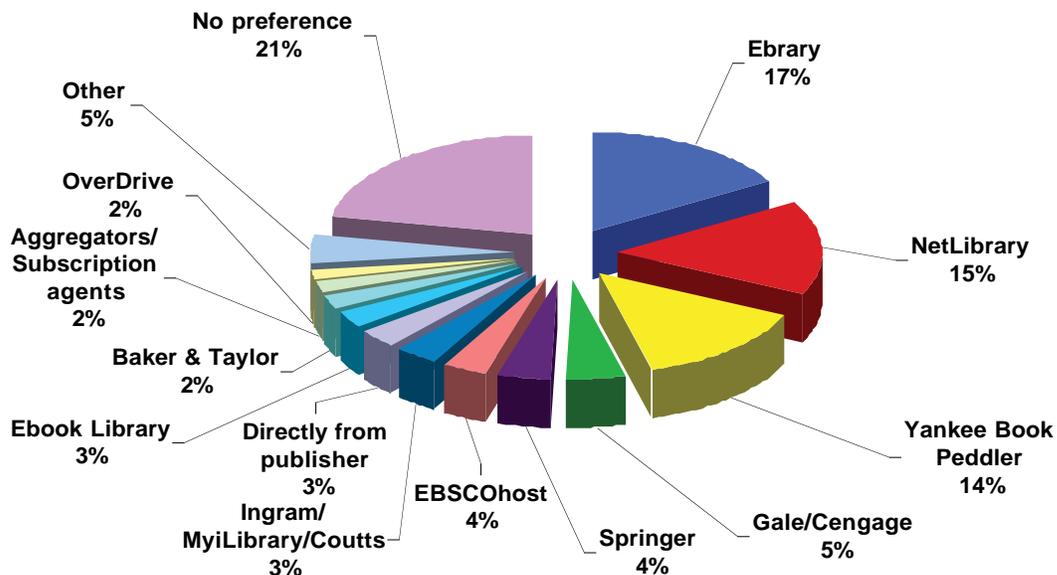
### Preferred Vendors

When asked to select the one ebook vendor they would most prefer to use, Ebrary received the most significant response (17%, unchanged from last year) followed by EBSCOhost (13%; last year, 15% had selected NetLibrary and 4% had selected EBSCOhost). This year, an all-time high of 32% selected “no preference,” up from 22% last year and 25% in 2010.

**Figure 39. Which is your preferred ebook vendor?  
% of academic libraries**



**Figure 40. Which is your preferred ebook vendor?  
% of academic libraries (2011 survey)**



Community colleges increasingly have no preference (45%, up from 21% last year), but when they do have a preference, it is EBSCOhost (27%). As was the case last year, graduate/professional libraries prefer Yankee Book Peddler (16%, down from 25%) and undergraduate libraries prefer Ebrary (24%, up slightly from 22%).

**Table 26. Which is your preferred ebook vendor?**  
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Ebrary	11%	24%	14%	12%	24%	19%	25%	6%
EBSCOhost (formerly NetLibrary)	9%	11%	27%	10%	17%	22%	15%	2%
Yankee Book Peddler	16%	10%	5%	13%	10%	8%	8%	20%
Ingram/MyiLibrary/ Coutts	7%	3%	0%	6%	2%	0%	1%	12%
Gale Virtual Reference Library	4%	3%	5%	4%	2%	3%	2%	6%
Ebook Library	5%	2%	0%	4%	2%	3%	1%	6%
Springer	4%	2%	0%	4%	1%	0%	5%	2%
Baker & Taylor	4%	0%	5%	2%	1%	3%	1%	2%
Amazon.com	2%	3%	0%	2%	2%	5%	0%	4%
Directly from publisher	4%	1%	0%	2%	1%	0%	1%	4%
OverDrive	2%	2%	0%	2%	1%	0%	2%	2%
CredoReference	0%	3%	0%	1%	2%	3%	2%	0%
Aggregators/Subscriptio n agents	2%	1%	0%	2%	0%	3%	0%	2%
Barnes & Noble	2%	0%	0%	1%	0%	0%	0%	2%
Ovid	2%	0%	0%	1%	0%	0%	0%	2%
Oxford Reference	2%	0%	0%	0%	1%	3%	0%	0%
iTunes	0%	0%	0%	0%	0%	0%	0%	0%
Nook Study from B&N	0%	0%	0%	0%	0%	0%	0%	0%
Safari	0%	0%	0%	0%	0%	0%	0%	0%
Other	0%	2%	0%	0%	2%	0%	2%	0%
No preference	29%	31%	45%	35%	30%	32%	32%	30%
<b>2011</b>								
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%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
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%

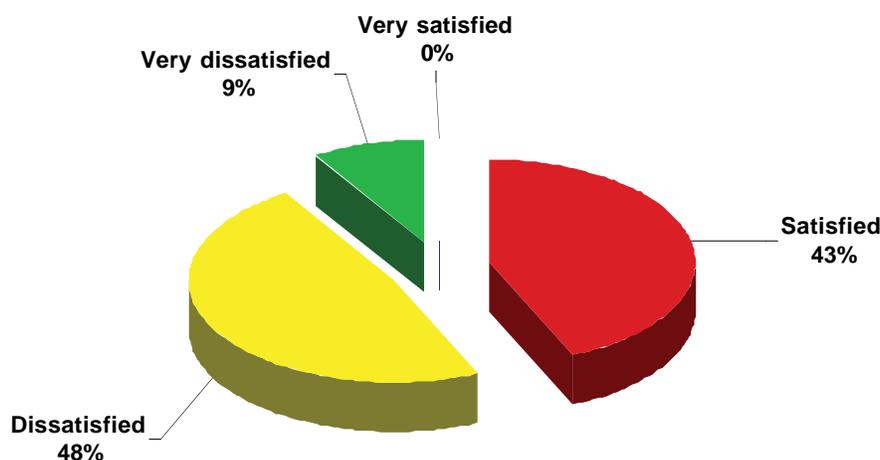
### Discounts

In our 2012 survey, we asked about librarians' satisfaction with the discounts they received on ebooks. Judging from the verbatim comments (see the end of this section), we imagine more than a few respondents having done a spit-take had they been drinking anything while completing our survey. ("Discounts? What discounts?" one respondent commented.)

Ergo, we are not surprised to find that nearly one-half (48%) of respondents are "dissatisfied" by the discounts they receive (or don't receive) from ebook vendors. Nine percent are "very dissatisfied." Still, 43% are "satisfied," though no one is "very satisfied."

**Figure 41. How satisfied are you with discounts off of lists you receive from ebook vendors?**

*% of academic libraries*



Community colleges are the most likely to be “satisfied” (62%) and graduate/professional libraries are the most likely to be “dissatisfied” with vendor discounts.

**Table 27. How satisfied are you with discounts off of lists you receive from ebook vendors?**

**% of 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+
Very satisfied	0%	0%	0%	0%	0%	0%	0%	0%
Satisfied	34%	44%	62%	39%	49%	47%	44%	40%
Dissatisfied	58%	46%	29%	47%	47%	44%	46%	53%
Very dissatisfied	8%	10%	10%	15%	4%	8%	10%	7%

## Important Attributes in an Ebook Vendor

In each survey, we ask our respondents to rate a series of vendor attributes—are they very important, important, somewhat important, or unimportant?

In this section, we provide the net “very important/important” responses. These are the most vitally important attributes of ebook vendors and ebooks for academic librarians. (For the sake of clarity, 2012’s responses are provided in Figure 42 while 2011’s responses are provided in Figure 43.)

Most of these attributes are down somewhat from previous years—all except for the number one attribute, which trumps all others. As always, the most vitally important attribute of ebook vendors for academic libraries is “ease of use for library users”—this was either very important or important for almost every respondent to this survey (98%, virtually unchanged from the 99% who cited this attribute in both 2011 and 2010 surveys).

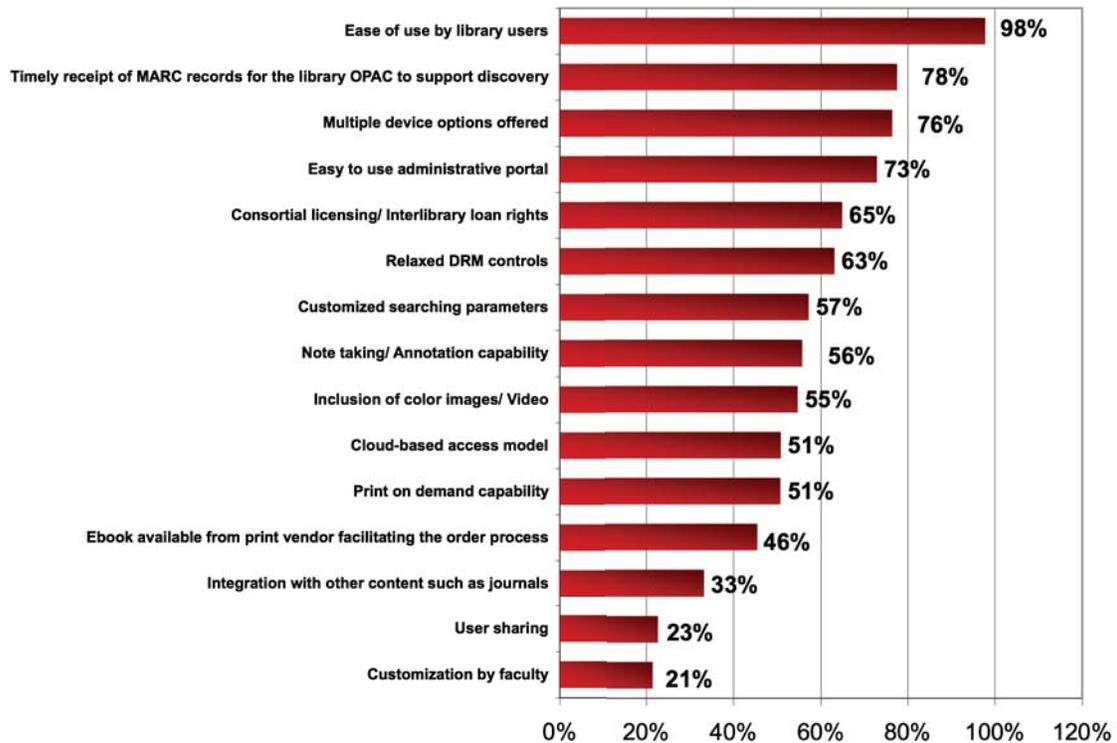
We slightly rephrased the number two attribute: “Free MARC records for the library OPAC to support discovery” in previous surveys (and selected by 82% and 81% of respondents in 2011 and 2010, respectively) became “Timely receipt of MARC records for the library OPAC to support discovery” in 2012, and was selected by 78% of respondents.

“Multiple device options offered” increased from 74% to 76%, and is up a bit from the 64% who selected this in 2010. “Easy to use administrative portal” is unchanged at 73% (it was at 77% in 2010).

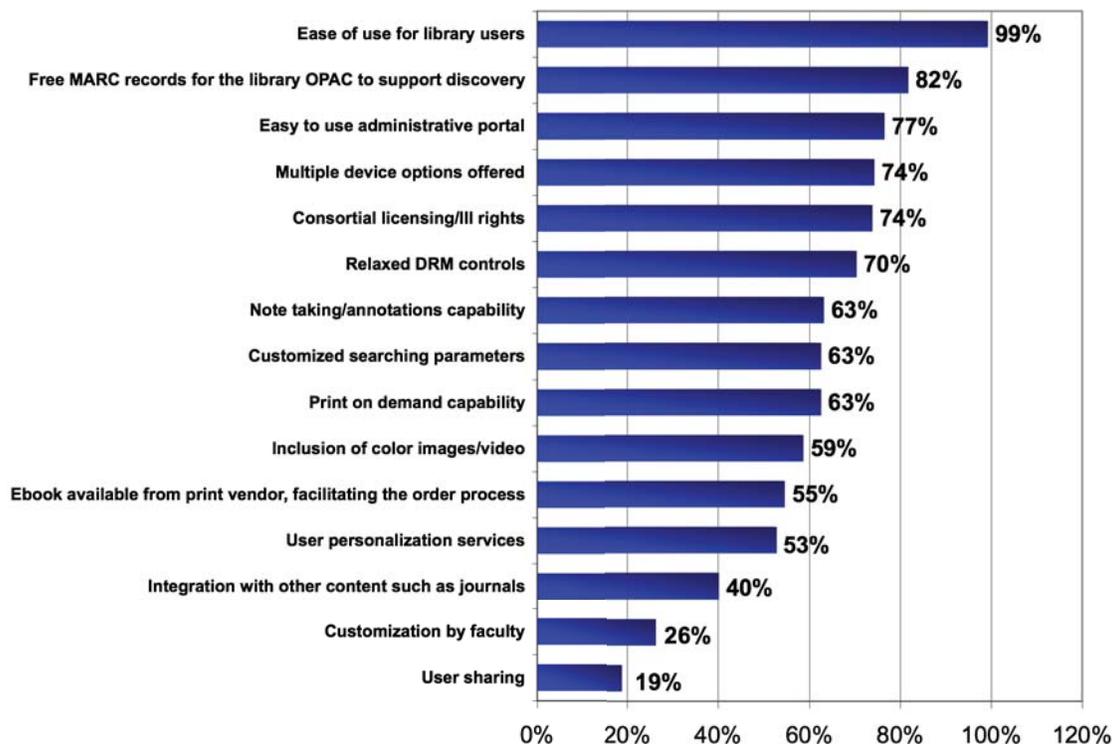
“Print on demand capability” continues its decline—it was 74% in 2010 and is now down at 51%.

We added “cloud-based access model” to the 2012 survey and it debuted at 51%.

**Figure 42. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)**  
**% of academic libraries**



**Figure 43. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)**  
**% of academic libraries (2011 survey)**



**Table 28. Please rate the importance of the following attributes when considering an ebook (Very Important/Important)**  
**% of academic libraries by type of institution and acquisition budget**

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K– \$999K	\$1 Mil+
<b>2012</b>								
Ease of use by library users	98%	96%	100%	96%	99%	97%	98%	98%
Note taking/ Annotation capability	59%	61%	36%	56%	59%	60%	56%	55%
Easy to use administrative portal	77%	76%	57%	70%	74%	71%	74%	72%
Timely receipt of MARC records for the library OPAC to support discovery	82%	77%	68%	78%	78%	77%	79%	76%
Print on demand capability	48%	60%	35%	53%	53%	52%	49%	60%
Customized searching parameters	59%	51%	68%	59%	53%	60%	59%	50%
Multiple device options offered	80%	76%	68%	76%	78%	77%	79%	72%
Integration with other content such as journals	32%	31%	40%	32%	36%	42%	32%	30%
User sharing	21%	26%	19%	28%	17%	32%	19%	22%

	Type of Institution			Public or Private		Acquisition Budget		
	Graduate/ Prof	Under- grad	Com- munity College	Public	Private	< \$100K	\$100K- \$999K	\$1 Mil+
Consortial licensing/ Interlibrary loan rights	68%	69%	50%	72%	58%	49%	61%	84%
Relaxed DRM controls	77%	55%	50%	64%	60%	46%	63%	74%
Inclusion of color images/ Video	64%	48%	48%	58%	49%	45%	53%	62%
Cloud-based access model	54%	50%	48%	46%	54%	38%	56%	48%
Customization by faculty	27%	23%	5%	23%	21%	15%	17%	35%
Ebook available from print vendor facilitating the order process	52%	46%	30%	47%	43%	33%	40%	62%
<b>2011</b>								
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%

## General Conclusions

Ebrary and EBSCOhost (the latter largely via its acquisition of NetLibrary) are the most preferred ebook vendors, to the extent that academic librarians have a preference, which they increasingly do not.

Ease of use, multiple device support, and timely receipt of MARC records to support discovery are top attributes. The fairly negative data regarding satisfaction with discounts—combined with other top challenges and concerns expressed quantitatively and qualitatively in this year’s survey—suggests very strongly that the cost of ebooks is the number one issue for academic libraries, and without vendor help it is the most insoluble of all the challenges that ebooks present.

There has been much turbulence with ebook pricing, and even the courts have become involved, with three publishers—Simon & Schuster, Hachette, and HarperCollins—implicated in ebook price fixing. Meanwhile, Apple was sued by the Department of Justice “charging that they conspired to limit ebook price competition.”<sup>18</sup> What these decisions will mean for ebook pricing—or for libraries—remains to be seen. Some have said it will lower ebook prices, but almost immediately after these decisions, Hachette decided to jack to cost of ebooks for libraries up by 220%.<sup>19</sup> It’s a jungle out there, and it’s the librarians who have to get out the machetes and try to hack a clear path.

As we say every survey, 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 and previous sections. The demand for electronic content is, at least for academic libraries, not even the *new* normal but an older normal by now, but access for libraries is still restricted by pricing, limits on multiple access, DRM, and discovery issues. These can act as serious deterrents to the use of ebook collections, potentially derailing this technology, regardless of how well-entrenched it may have become.

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<sup>18</sup> Patricia Hurtado, “E-Book Publishers, States’ \$69 Million Accord Approved,” Bloomberg, September 14, 2012, <http://www.bloomberg.com/news/2012-09-14/u-s-judge-approves-69-million-digital-book-accord-with-states.html>.

<sup>19</sup> Cory Doctorow, “Librarians to Hachette: Seriously? You want to triple the cost of ebooks?” Boing Boing, September 15, 2012, <http://boingboing.net/2012/09/15/librarians-to-hachette-seriou.html>.

## 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.

*LJ's* college and university library ebook survey was fielded from May 4, 2012 to June 29, 2012. A survey invite was sent directly to all *Library Journal* and *School Library Journal* newsletter subscribers. The survey link was advertised in *Library Journal* and *School Library Journal* newsletters and on two discussion lists: [collib-1@ala.org](mailto:collib-1@ala.org) and [web4lib.org](http://web4lib.org). A drawing for a \$499 Apple™ iPad was offered as incentive to reply.

The survey closed with 339 academic libraries from across the country 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 nationally.

Previous data used for comparison is based on 488 U.S. academic libraries in 2011 and 364 U.S. academic libraries in 2010.

## 2012 Academic Library Ebook Survey

**1. What is the zip code at your library's location? \_\_\_\_\_ (U.S. Only)**

**2. Which of the following comes closest to your job title?**

- Library director/Asst 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/2 year college library
- Undergraduate 4 year college/university library
- Graduate/professional academic library
- 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

**7. How long has your library offered ebooks?**

- Library does not have ebooks [If your library has no ebooks, skip to Q35]  
 Less than 1 year  
 1 to 2 years  
 3 to 5 years  
 6 to 8 years  
 Over 8 years

**8. Has your library experienced a change in demand for ebooks since this time last year?**

- Yes, dramatic increase in demand  
 Yes, slight increase in demand  
 No, demand is unchanged  
 No, demand has decreased  
 We receive no requests for ebooks

**9. How many ebooks does your library subscribe to or own in total?**

- Under 1,000, specify # \_\_\_\_\_  
 1,000 to 4,999  
 5,000 to 9,999  
 10,000 to 24,999  
 25,000 to 49,999  
 50,000 to 74,999  
 75,000 to 99,999  
 100,000 to 249,999  
 250,000 to 499,999  
 500,000 or more, specify # \_\_\_\_\_

**10. Is your library part of a consortium license program for its ebook collection?**

- Yes  
 No, but planning to join one  
 No  
 Don't know

**11. Does your library buy ebooks independently?**             Yes             No

**12. If yes, approximately how many ebooks has your library bought or licensed independently?**

- Under 1,000, specify # \_\_\_\_\_                       50,000 to 74,999  
 1,000 to 4,999     75,000 to 99,999  
 5,000 to 9,999     100,000 to 249,999  
 10,000 to 24,999     250,000 to 499,999  
 25,000 to 49,999     500,000 or more, specify # \_\_\_\_\_

**13. What percent of your library ebook usage would you estimate consists of downloaded ebooks versus ebooks viewed online?**

% ebooks downloaded \_\_\_\_\_%

% ebooks viewed online \_\_\_\_\_%

**14. Is your library able to track usage statistics for ebooks available through vendors or consortia?**

- Yes  
 Not always  
 No  
 N/A

**15. Approximately, what was your total ebook usage/circulation for the last academic year (2010-2011)?**

2010-2011 academic year usage/circulation \_\_\_\_\_

**16. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?**

- Increase, by what percentage? \_\_\_\_\_%  
 Stay the same  
 Decrease, by what percentage? \_\_\_\_\_%

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

- |   |  |
|---|--|
| <input type="checkbox"/> Scholarly monographs | <input type="checkbox"/> Classic literature                            |
| <input type="checkbox"/> Textbooks            | <input type="checkbox"/> General adult fiction (including backlist)    |
| <input type="checkbox"/> Reference            | <input type="checkbox"/> General adult nonfiction (including backlist) |
| <input type="checkbox"/> Bestsellers          | <input type="checkbox"/> Other   |
- (specify) \_\_\_\_\_

**18. Which category of ebooks is most in demand in your library? Please select only one.**

- |   |  |
|---|--|
| <input type="checkbox"/> Scholarly monographs | <input type="checkbox"/> Classic literature                            |
| <input type="checkbox"/> Textbooks            | <input type="checkbox"/> General adult fiction (including backlist)    |
| <input type="checkbox"/> Reference            | <input type="checkbox"/> General adult nonfiction (including backlist) |
| <input type="checkbox"/> Bestsellers          | <input type="checkbox"/> Other   |
- (specify) \_\_\_\_\_

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

- |  |  |
|--|--|
| <input type="checkbox"/> Business        | <input type="checkbox"/> Medicine              |
| <input type="checkbox"/> Education       | <input type="checkbox"/> Science               |
| <input type="checkbox"/> Humanities      | <input type="checkbox"/> Technology            |
| <input type="checkbox"/> Social Sciences | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Law             | <input type="checkbox"/> All disciplines       |

**20. In which discipline(s) do you project the greatest growth in ebook usage in the next two to three years?**

- |  |  |
|--|--|
| <input type="checkbox"/> Business        | <input type="checkbox"/> Medicine              |
| <input type="checkbox"/> Education       | <input type="checkbox"/> Science               |
| <input type="checkbox"/> Humanities      | <input type="checkbox"/> Technology            |
| <input type="checkbox"/> Social Sciences | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Law             | <input type="checkbox"/> All disciplines       |

**21. 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

**22. On what device(s) do your library users most often read ebooks? Check all that apply.**

- Personal Laptop/Computer/Netbook  
 Library computer  
 Dedicated ebook reader (e.g., Nook, Sony Reader, Kindle)  
 iPad or other tablets  
 Smartphone  
 iPod Touch or similar  
 Other (specify) \_\_\_\_\_  
 Don't know

**23. What hinders students/faculty from using your library's ebook content? Check all that apply.**

- Limited titles available  
 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  
 In 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) \_\_\_\_\_  
 None of the above

**24. Are you involved in the recommendation/purchasing or licensing process of ebooks for your library?**

- Yes  
 No (If No, skip to Q34)

**25. 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)\_\_\_\_\_

**26. [If user-driven acquisition] What are the benefits of user-driven acquisition?**

- Better budget management  
 Helps me focus acquisition to student/faculty needs  
 Allows me to offer more choice at reasonable cost  
 Other, please specify\_\_\_\_\_

**27. Approximately how much would you estimate your library has spent on ebooks during the current 2011/2012 academic year?**

- \$0  
 Less than \$10,000 (specify)\_\_\_\_\_
- \$10,000 - \$24,999  
 \$25,000 - \$49,999  
 \$50,000 - \$99,999  
 \$100,000 - \$249,999  
 \$250,000 - \$499,999  
 \$500,000 or more (specify) \$\_\_\_\_\_
- Don't know

**28. 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% - 5%	6% - 10%	11% - 15%	16% - 25%	More than 25%
Last year	<input type="checkbox"/>					
Currently	<input type="checkbox"/>					
In 5 years	<input type="checkbox"/>					

**29. What factors influence your decision to purchase/license a particular ebook for your library? (Check all that apply)**

- |   |   |
|---|---|
| <input type="checkbox"/> Projected usage/high demand titles                   | <input type="checkbox"/> Relaxed digital rights management                                  |
| <input type="checkbox"/> Availability as a single title purchase              | <input type="checkbox"/> Inclusion in bundles with attractive pricing                       |
| <input type="checkbox"/> Content not readily available elsewhere              | <input type="checkbox"/> Student request  |
| <input type="checkbox"/> Book reviews   | <input type="checkbox"/> Faculty request  |
| <input type="checkbox"/> Limited shelf space                                  | <input type="checkbox"/> Required use of titles in the curriculum                           |
| <input type="checkbox"/> Ease of purchase/Integrated purchase with print book | <input type="checkbox"/> Licensing terms/Lending caps (e.g., Harper Collins 26 circs model) |
| <input type="checkbox"/> Cost   | <input type="checkbox"/> Multiple users at one time   |
| <input type="checkbox"/> Reduces material loss                                | <input type="checkbox"/> Other (Please specify) _____                                       |
| <input type="checkbox"/> Supports distance learners                           |   |

**30. 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	<input type="checkbox"/>				
Note taking/annotation capability	<input type="checkbox"/>				
Easy to use administrative portal	<input type="checkbox"/>				
Timely receipt of MARC records for the library OPAC to support discovery	<input type="checkbox"/>				
Print on demand capability	<input type="checkbox"/>				
Customized searching parameters	<input type="checkbox"/>				
Multiple device options offered (iPhone, Sony Reader, smartphone, etc.)	<input type="checkbox"/>				
Integration with other content, such as journals	<input type="checkbox"/>				
User sharing (e.g., social bookmarks, comments, voting)	<input type="checkbox"/>				
Consortial licensing/ Interlibrary loan rights	<input type="checkbox"/>				
Relaxed DRM controls	<input type="checkbox"/>				
Inclusion of color images/video	<input type="checkbox"/>				
Cloud-based access model	<input type="checkbox"/>				
Customization by faculty	<input type="checkbox"/>				
Ebook available from print vendor, facilitating the order process	<input type="checkbox"/>				

**31. How satisfied are you with discounts off of list you receive from ebook vendors?**

- Very satisfied  
 Satisfied  
 Dissatisfied  
 Very dissatisfied

**32. From which vendor(s) does your library purchase/license ebooks? (Check all that apply)****33. Which is your preferred ebook vendor?**

	Q32. ebook vendor(s) you purchase from	Q33. One Preferred ebook vendor
Amazon.com	<input type="checkbox"/>	<input type="checkbox"/>
Baker & Taylor	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble	<input type="checkbox"/>	<input type="checkbox"/>
Credo Reference	<input type="checkbox"/>	<input type="checkbox"/>
Ebrary	<input type="checkbox"/>	<input type="checkbox"/>
Ebook Library	<input type="checkbox"/>	<input type="checkbox"/>
EBSCOhost (formerly NetLibrary)	<input type="checkbox"/>	<input type="checkbox"/>
Gale Virtual Reference Library	<input type="checkbox"/>	<input type="checkbox"/>
Ingram/MyiLibrary/Coutt's	<input type="checkbox"/>	<input type="checkbox"/>
iTunes	<input type="checkbox"/>	<input type="checkbox"/>
Nook Study from B&N	<input type="checkbox"/>	<input type="checkbox"/>
OverDrive	<input type="checkbox"/>	<input type="checkbox"/>
Ovid	<input type="checkbox"/>	<input type="checkbox"/>
Oxford Reference	<input type="checkbox"/>	<input type="checkbox"/>
Safari	<input type="checkbox"/>	<input type="checkbox"/>
Springer	<input type="checkbox"/>	<input type="checkbox"/>
Yankee Book Peddler	<input type="checkbox"/>	<input type="checkbox"/>
Directly from publisher	<input type="checkbox"/>	<input type="checkbox"/>
Aggregators/Subscription agents	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
No Preference		<input type="checkbox"/>

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


---

(after answering, please skip to Question 37)

**THE 2 NEXT QUESTIONS ARE FOR THOSE WHO DO NOT CURRENTLY OFFER EBOOKS.**

**35. 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
- Staff or administrative resistance
- Other (specify) \_\_\_\_\_
- We are in the process of adding ebooks

**36. 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) \_\_\_\_\_

**INCENTIVE**

**37. Do you want to be included in the drawing to win an Apple iPad?**

- Yes
- No, thanks

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