



The CHARLESTON REPORT

Business Insights into the Library Market

JULY / AUGUST 2006

VOLUME 11, NO. 1

ALA Hot Topics

The 2006 ALA Annual Conference was the first large conference to be held in New Orleans after the devastation caused by Hurricane Katrina. The Conference saw 16,964 attendees, about 10,000 less than 2005's Conference in Chicago.

Hot Topics included the following:

- **Disaster preparedness, response, and recovery, and dealing with FEMA.** Libraries want to be prepared in case of disaster.
- **Improving the user experience with the library OPAC to make it more like Google.** Libraries are incorporating features such as improved relevance ranking, spell checking of search terms, and faceted browsing. Many ILS vendors debuted new functionality for the OPAC.
- **LC's recent series authority decision.** The Library of Congress will no longer provide controlled series access points in its bibliographic records for records in series.
- **Blogging.** Everyone seems to be talking about it. A room was set aside for bloggers to report on their conference experiences. A list of some conference blogs can be found at http://meredith.wolfwater.com/ala2006/index.php?title=Conference_Bloggers.
- **Web 2.0 technologies like RSS feeds, social bookmarking tools, social networking sites, and other interactive technologies.** These tools are being used to promote the library's resources and expand its reach.

Short Takes

Amazon.com has announced the launch of Library Processing for corporate account customers. The service will enable *Amazon.com*'s thousands of library customers to receive Machine-Readable Cataloging (MARC) records and have books and other media they order from *Amazon.com* fitted with Mylar jackets, barcodes, and other important preparation services. Currently libraries may choose to partner with The Library Corporation, Marcive, or OCLC PromptCat to provide MARC records. For more information, logon to <http://www.amazon.com/b/102-0124548-6128936?ie=UTF8&node=16374521>. *BusinessWire*, July 31, 2006.

Libraries on the Move

The University of California libraries have announced their partnership with Google Book Search to digitize books from the libraries' collections. UC becomes the latest partner in the Google Books Library Project, which was launched in December 2004 to digitize books drawn from the libraries of the University of Michigan, Harvard University, Stanford University, Oxford University, and the New York Public Library. There are over 100 libraries on the 10 UC campuses. <http://www.universityofcalifornia.edu/news/2006/aug09.html>

First Lady Laura Bush announced grants of \$20,869,145 from the federal Institute of Museum and Library Services (IMLS). Thirty-five awards will go to universities, libraries, and library organizations across the country today to recruit and educate librarians. The grants are designed to help offset a current shortage of school library media specialists, library school faculty, and librarians working in underserved communities, as well as the upcoming shortage of library directors and other senior librarians. The First Lady made the announcement on June 26th during a national town hall meeting in New Orleans. <http://www.imls.gov/news/2006/062806.shtm>

The University of Pennsylvania's College of Arts and Sciences has created "academic blog pages" for students entering the class of 2010. Students are asked to fill out academic questionnaires about their intellectual interests, educational experiences, and academic concerns. These pages are designed for the academic advisor/student user as they learn about each other; the pages cannot be edited and are not open to the public. <http://www.insidehighered.com/news/2005/11/16/fileshare>

Ohio State University (OSU) has begun construction on a \$105 million renovation and library construction project. The project, set for completion in 2009, is among the nation's largest academic library renovation projects to take place in one phase. The project will include a restoration of the William Oxley Thompson Library to bring back the original 1913 architectural features while at the same time creating a modern facility with wireless access, a café, and an information commons. *LJ Academic NewsWire*, July 20, 2006.

The Richland County Public Library (RCPL), in Columbia, South Carolina, has received a budget increase of 13.2% in local funding for the next fiscal year beginning July 1, 2006. RCPL's new budget is \$17.9 million, which is a \$1.9 million increase from last year. The library's materials budget has risen 22%, to \$3.3 million. For RCPL this is the 27th year of consecutive budget increases. *Library Journal.com*, July 27, 2006.

Highlights from Opening Sessions at the Fiesole Collection Development Retreat Series

Retreat No. 8, August 3-5, 2006, Lund, Sweden

“The New World Order in Collection Development — Revisited”

Blaise Simqu, President, Sage Publications:

- Revolution is often a series of small changes, which sometimes sneak up and aren't recognized as revolution until after the fact. This makes it difficult at best to effectively manage those changes.
- What are important are not “things,” like books or journals, but rather processes and communication.
- We must be careful to not simply try to protect the status quo. “No mourning or nostalgia” — at least not much, and above all look for useful adaptations to new environments.

Michael Mabe, CEO, International Association of STM Publishers

- There has been and continues to be considerable behavioral change among authors/users, but no significant change in the fundamental driving forces.

David Nicholas, CIBER, University College, London

- Search engines matter a great deal, and most everyone starts at Google.
- There is considerable diversity in the scholarly community. “One size does not fit all”, and if we generalize we will be inevitably misled.
- The importance of trust and brand as a driver of user behavior should be remembered.

The Charleston Report, Business Insights into the Library Market is published six times a year by The Charleston Co., 6180 East Warren Avenue, Denver, CO 80222. Subscription price per year is \$155 (U.S.) and \$170 (outside the U.S.). FAX: 303-282-9743.

The Charleston Report is written for publishers, vendors, product developers, merchandisers, and wholesalers who are interested in expanding their library market. Readers will gain insights in effective marketing to libraries, early alerts to library trends, access to library leaders' future plans, library budget projections, library strategic plans, technology directions, and publications needs.

For comments and contributions, contact Kristen DeVoe, <kedevoe24@yahoo.com>, Editorial Offices, 6180 East Warren Avenue, Denver, CO 80222. 303-282-9706, FAX 303-282-9743, (c) Copyright 2006, The Charleston Co. All rights reserved. ISSN 1091-1863.

Editor: Kristen DeVoe

Editorial Board: Rebecca Lenzini, Katina Strauch

Chief Financial Officer: Rebecca T. Lenzini

Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

Don't Miss This!

“Acquiring Electronic Content: The Best Practice Option” by Judy Luther (Informed Strategies) in *The Charleston Advisor* Volume 8, Number 1 (July 2006). This *Advisor* Op Ed details problems (for both publishers and librarians) with the current process of acquiring electronic content and puts forth the possibility of using best practices rather than legal contracts to define subscription arrangements for electronic content. In the article Luther outlines important points that both librarians and publishers could consider when developing a best practices document and also presents ideas on how publishers and librarians could contribute to the maintenance of such a document.

To read the full Open Access article, go to <http://www.charlestonco.com/features.cfm?id=208&type=ed>.

TCR Tips: What's the Best Way to Market To Librarians?

- **Advertisements and brochures.** Visual is very important. The librarian might throw the brochure away, but she will remember that a particular publisher has an encyclopedia on a relevant subject.
- **Reviews.** A good review is excellent. And telling the librarian about it in advertisements or brochures is a no-brainer.
- **Emails.** These are less valuable, unless the email has a visual component. Most of us get too many emails.
- **Telephone calls.** Cold telephone calls are intrusive on a librarian's already busy schedule.
- **Visits.** Sales representatives with focused material are good. But do NOT visit without an appointment.
- **Research the library and visit the library's Website.** Do this before your call or visit. And be sure to look at the university or institution's catalog to see what courses are required and which are electives.

Three questions you should ask:

- a) What is not available on the market that libraries need?
- b) How can existing databases, books, journals, Websites be improved?
- c) What should I learn from my competitors?

In the News

Inform Technologies has developed Publisher Services, which provides publishers and media companies with a technology solution for making their Websites more accessible and engaging for readers. Publisher Services is designed to help publishers leverage their existing content and editorial assets to deliver an enriched, personalized online experience. For more information on Publisher Services, visit <http://www.inform.com/inform2/about/publisher-services.aspx#demo>. *Information Today Newsbreaks*, July 31, 2006.

TCR Surveys: The Future of Print-Only Journal Subscriptions

“We are subscribing to fewer print journals each year...In the next five years we hope/plan to subscribe to more publisher electronic journal packages.”

— Academic librarian and TCR Surveys respondent

A recent discussion on the listserv LIBLICENSE-L raised several questions regarding print journal subscriptions. In an effort to better understand the current and possibly the future state of print subscriptions in libraries, this issue's TCR Survey asked over 175 librarians about their library's preferred format for journal subscriptions, why they might opt to subscribe to the print version of a journal rather than electronic, if they plan to move to electronic-only subscriptions in the future, and if they could comment on the future of subscribing to journals in a print-only format.

As the majority of the respondents (161) work in academic libraries, the responses best reflect the status of print-only journal subscriptions in that type of institution.

- Electronic-only was overwhelmingly the preferred subscription format for both new journal subscriptions and renewals.
- Second among preferred format options for journal subscriptions and renewals is a print + electronic option.
- Few (10) respondents indicated that print-only is their library's preferred format for new subscriptions or renewals.
- Cost was the most frequently cited factor that would prompt librarians to subscribe to a journal in print-only.
- Issues in the following areas were also cited as reasons that a library would prefer the print-only subscription over electronic:
 - licensing issues
 - user demand for journals in print format
 - archival concerns
 - subject area of the journal in question.
- One half of the survey respondents indicated that their library has, or intends to develop, a plan to move to an electronic-only format for future journal subscriptions and renewals.
- Many respondents did not see much of a future for print-only subscriptions at their libraries. Some envisaged a move to e-only while others see a decline, but not disappearance of print-only subscriptions. Sample responses regarding the future of print-only journal subscriptions include:
 - “We have a goal to move to at least 70% e-only in the next 3 years.”
 - “Print will only be chosen when electronic is not available or the licensing is a problem.” (*Ed. Note: This was a very common response.*)
 - “Going down, down, down...”
 - “We will retain print subscriptions when there are no perpetual access rights, when e-only is not an option, when e-only is not full text, and when there is no electronic version.”
 - “Very low number of print-only journals, primarily in humanities and social sciences.”
- Despite the overwhelming popularity of electronic-only as the future format for most journal subscriptions, some respondents indicated that they plan to continue to subscribe to print-only until some issues such as archival and licensing concerns are resolved or as long as they feel it is the preferred format for their users.

By the Numbers

40%...Google produces 40% more revenue from each search than Yahoo does, thanks to software that is better at selecting relevant text advertisements to place on a page of search results. *New York Times*, July 19, 2006.

6%...More than 6% of the U.S. adult online population, or about 9 million Web users, have downloaded a podcast recently according to *The Economics of Podcasting*, a report released by Nielsen Analytics.

18-24...According to the same Nielsen Analytics report, Individuals between 18-24 years of age are twice as likely to be active podcast consumers while adults 45 and older fall mostly below the podcasting curve.

16,964...The final number of attendees at the 2006 ALA Annual Conference in New Orleans.

\$3.9 billion...During the first quarter of 2006, advertisers spent \$3.9 billion on online advertising. *BusinessWeek Online*, July 17, 2006.

7.4 billion...Americans performed about 7.4 billion Web searches in May, up 42% from May 2005, according to comScore Networks. *BusinessWeekOnline*, July 17 2006.

Most Popular Blogging Tools

The Pew Internet and American Life Project has published its report, based on telephone survey data, entitled “Bloggers: A Portrait of the Internet's New Storytellers” (http://www.pewinternet.org/PPF/r/186/report_display.asp). The report identifies the demographic characteristics of American bloggers as well as the most frequently used blogging tools in order of popularity.

1. LiveJournal — <http://www.livejournal.com>
2. MySpace — <http://www.myspace.com/>
3. Blogger — <http://www.blogger.com>
4. Xanga — <http://www.xanga.com>
5. FrontPage — <http://www.microsoft.com/frontpage>
6. TypePad — <http://www.sixapart.com/typepad/>
7. BlogSpot — <http://www.blogspot.com>
8. Moveable Type — <http://www.sixapart.com/movabletype/>
9. Squarespace — <http://www.squarespace.com>
10. something else
11. built own blogging software
12. do not use blogging software
13. don't know

Current *Charleston Advisor* Reviews

The Charleston Advisor's current issue —v.8, no.1, July 2006 — has been mailed to subscribers and is also available online. A list of the reviews in this issue appears below. And just remember — all non-review, informative articles are Open Access at www.charlestonco.com.

COMPARATIVE REVIEWS

Sociological Abstracts and SocINDEX with Fulltext

STAND ALONE REVIEWS

The American Civil War: Letters and Diaries

American Drama 1714-1915

Art Museum Image Gallery: AMIG (H.W. Wilson)

Book Index with Reviews

CompPile

Digital Collections of the U.S. Military Academy at West Point

EBSCO A to Z's Administrative User Interface

Education Index Retrospective: 1929-1983

Faculty of 1000

GeoScienceWorld

The Great Buildings Collection

In the First Person

Journal Use Reports

Mental Health Information Network of Metro Boston

Mintel Reports

Museum Archival Information System: MINISIS Integrator

New York Online Access to Health (NOAH)

To advertise in *The Charleston Advisor*, contact Toni Nix at <justwrite@lowcountry.com> or Edna Laughrey <elaughrey@aol.com>.

TCR Quotes from The 8th Fiesole Collection Development Retreat

- “The federated searching solutions that are out there are not yet good enough. We need better navigation of searches with taxonomic and associative indexing.” — Michael Keller, Director of Libraries, Stanford University
- “The \$9.6 billion scholarly publishing business is growing and 53% is owned by five primary publishers.” — David Worlock, Chairman, Electronic Publishing Services Ltd.
- “90% of academic researchers begin their research on Google Scholar.” — Derek Law, Head of the Information Resources Directorate, University of Strathclyde

Mark Your Calendars!

Internet Librarian 2006 “Integrated Experiences: Compelling Content Combinations,” is scheduled for October 21-25th, 2006, at the Monterey Conference Center in Monterey, California. For more information, registration details, and an Advance Program, logon to <http://www.infotoday.com/il2006/default.shtml>.

The 26th Annual Charleston Conference: Issues in Book and Serial Acquisition will take place November 8-11, 2006, in Charleston, SC. For up-to-date conference information and online registration, logon to <http://www.katina.info/conference>.

The 2006 National Book Festival organized and sponsored by the Library of Congress, and hosted by First Lady Laura Bush, will be held on Saturday, Sept. 30, 2006, on the National Mall in Washington, D.C., between 7th and 14th streets from 10 a.m. to 5 p.m. For more information, logon to <http://www.loc.gov/bookfest>.

Check It Out!

“Virtual Reference in the Age of Pop-Up Blockers, Firewalls, and Service Pack 2” by Pascal Lipton in the July/August 2006 issue of *Online*. This article details technological obstacles to providing effective real time virtual reference sessions. The article includes a discussion of how browser incompatibility, operating system anomalies, firewalls, pop-up blockers, and more can inhibit virtual reference chat sessions and possibly lead to low usage of the service. Read more, at <http://www.infotoday.com/online/jul06/Lupien.shtml>.

Did You Know?

Most people use 2 word search phrases when using search engines. A July 2006 report from *OneStat.com*, a Dutch Web-analytics company, found that of all the search phrases worldwide, 29.91% of the people use two word search phrases, 27.85% of the people use three word search phrases. For more information, logon to http://www.onestat.com/html/aboutus_pressbox45-search-phrases.html. *American Libraries Direct*, July 26, 2006.

Coming in Future Issues

- More Highlights from the 8th Fiesole Collection Development Retreat
- Virtual Approval Plans
- Improving OpenURL link resolvers
- Update on Library Budgets