



The CHARLESTON REPORT

Business Insights into the Library Market

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Buyers Talk

Some electronic journal publishers worry that sales of individual subscriptions will suffer when the same information is available campus-wide through a license. David Goodman, Princeton University Biology Library, advises publishers to add value to individual subscriptions in ways that site license access does not offer. He suggests building individual profiles and sending out notifications based on past search queries.

A small minority of libraries have elected to buy paperbacks on approval, and, even in those cases, the decision was not made across the board but varied from selector to selector. However, firm orders for "paperbacks-whenever-possible" are commonplace. Celia Scher Wagner, Academic Book Center, reported in *Against the Grain*, April, 1998, pg. 59.

In Australia, funding from the National Priority [Reserve] Fund will support international collaboration among the communities involved in higher education infrastructure. Their target areas are: consortium purchasing/licensing of commercial databases; cooperative subject gateways to Internet resources; mirroring of data sets; and user authentication/authorization.

Several joint task forces from the Council on Library and Information Resources and the American Council of Learned Societies convened in early 1998 to discuss the needs of scholars in a technologically transformed environment. A common concern was that, "there is no adequate vision of where the technology will be in 10 or 15 years, and no grand strategy that says we need these particular technological devices and capabilities to make the information environment work for us." *CLIR Issues*, No. 2, March/April 1998, pg. 5.

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A Charleston Survey— Publishers' Web Sites

We know that most publishers are spending time and money creating, maintaining, and developing Web sites. This issue's Charleston Survey asked librarians if they used publishers' Web sites, when they go to the sites, and why. The results are very heartening for publishers.

"Usually I go to *Books in Print* or to Amazon.com because it's more convenient to go to a single source for more than just one publisher, a source that lists a lot of publishers together," said one of the respondents. However, for recent publications, the publisher's site usually has the most up-to-date information. "This is frequently the most current information available about new titles, because it is straight from the publisher."

Another respondent said, "I go to publishers' home pages everyday. Also, I frequently go to AcqWeb (<http://www.library.vanderbilt.edu/law/acqs/acqs.html>) because publisher information is aggregated there."

Another adds, "There is a definite lack of telephone numbers and addresses on the Web version of *BIP* and on Amazon.com. Obviously, they want to encourage consumers to buy from them. But, for librarians, it is very good to go to the publisher's site where more information is provided."

"I was looking for a small publisher and couldn't find it anywhere. Then, whoopee, I found their home page when I did a NetCrawler search on the Web." Another librarian said, "All I could find was information on a 1991 edition of a particular title. When I looked it up in *BIP*, it was listed as out-of-print, but when I searched the publisher's home page, I located a 1998 edition."

It is clear that librarians are using publishers' home pages as part of their regular acquisitions routines. Although aggregated channels are still the preferred method to find publishing information, librarians are turning more frequently to publishers' home pages for basic bibliographical details and availability status.

Best Books For Children

Of the thousands of children's books published in 1997, the Chicago Public Library's Children's Services Department has selected 100 of the best titles. Their demanding standards include quality writing and illustration, content that reflects a multicultural society, and texts capable of making a long term contribution to children's literature. The lists include picture, holiday, history, real life, poetry, science, and nature books for kids ages 4 to 12.

Chosen together with media specialists from the Chicago Public Schools, the following four are their top titles:

Mouse Mess by Linnea Riley

Library Lil by Suzanne Williams

For Your Eyes Only! by Joanne Rocklin

Forged by Fire by Sharon Draper

Textbook Purchasing

The Association of American Publishers (AAP) ranked states based on how much they spent on textbooks per pupil in 1996. Based on textbook sales to the states for both public and private schools, the following states are at the top and the bottom:

1. Indiana	\$84.36	47. Hawaii	\$33.20
2. New Jersey	77.04	48. Maine	30.01
3. Delaware	69.64	49. Washington	26.83
4. Illinois	66.91	50. Vermont	24.85
5. South Carolina	63.99	51. Texas	24.62

When the AAP surveyed 878 teachers across the United States in late 1995, they got these results: 41.6% of the teachers said they couldn't assign homework because there aren't enough books for students to take home. Further, 43.1% reported classroom disruptions because of students sharing books. A loss of class time was reported 37.9% of the day when the teacher had to read aloud or write on the board because students didn't have books.

Toshiba Offers DVDs To Libraries

Toshiba America Consumer Products is sponsoring a "DVD Community" initiative to bring Digital Video Disc players and movies to public libraries across the country. Libraries participating in the initiative will receive a free Toshiba DVD-Video player, a 30" SuperTUBE TV, and a collection of DVD movie titles (for more information call 212-596-0600 or see <http://www.toshiba.com>).

The reaction to the initiative has been mixed, with a number of large public libraries rejecting the offer. Denver, San Francisco, and Los Angeles Public Libraries all agreed that they need to see much more market penetration of DVDs—both players and titles—before the library can go ahead and start collecting and circulating the new media. Said Susan Kent, director of the Los Angeles Public Library, "We turned down the package partly because it does us no good to start circulating digital video discs with a collection of only 30 titles."

One of the major vendors supplying public libraries with audio and video materials, Professional Media Service Corp., predicted that the DVD will replace VHS video cassettes in public libraries as early as the year 2000. They have begun to list DVDs in their monthly selection guide; the May 1998 issue listed 71 titles, six of which were also listed as available on video compact disc (VCD). Only a few pioneering public libraries have established DVD collections.

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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.

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Book Topics Public Librarians Want

According to the latest *Library Journal* survey on public library book buying, popular fiction remains as the most circulated part of their collection. With more elaborate statistics available through automated systems, librarians were able to respond in detail about the interests of their public.

Over 2,000 respondents identified the following areas as having an increased patron interest. (The numbers exceed 100% as respondents were able to check more than one area):

Computer/Internet	57%
Health/Medical	48%
Personal Finance/Investments	23%
Christian Fiction	19%
How-To	19%



The hot topics on which librarians are looking for more information are:

Science/Technology/Math	37%
Medical/Health/Alternative Health	19%
Computers	19%



Those areas where librarians want to remove outdated titles and replace with current ones are:

Medicine	24%
Science/Technology	22%
Adult Fiction	20%
Computers	18%
Travel	17%

Electronic Resources in Research Libraries

Since the fall of 1996, the Association of Research Libraries (ARL) has been collecting information on the character and nature of research library investment in electronic resources in order to develop standard definitions and to collect information more systematically about the transformation of research library collections. They have concluded that so far data is neither comprehensive nor comparable from one library to another.

In general, the figures underestimate the actual expenditures "by some unknown amount." *The ARL Newsletter* for April, 1998 identifies the reason as inadequate definitions to collect data when libraries are employing a wide variety of funding and budgeting strategies to acquire electronic resources.

In the latest year available, 1995-1996, electronic resources represented 6.97% of the overall materials expenditures for 108 ARL libraries. Total electronic resources averaged \$364,961 in ARL libraries, with the median expenditure being \$301,992. The total materials budget average was \$5,654,911 and the median was \$4,975,353. Electronic resources are divided into computer files, 62% of expenditures, and electronic serials, 38% of expenditures. ARL researcher, Timothy D. Jewell, projects that the 1996-1997 results will show a "significant increase" in the total electronic expenditures. (*TCR* will publish later statistics as soon as they are available from ARL.)

Online User Group Reports

Each year in the spring, librarians interested in online products and services are invited to two separate meetings. SCOUG (Southern California Online Users Group) held its annual spring workshop on April 29, in Los Angeles. This year's meeting, entitled "Rethinking Reference and Research," drew a record crowd of 500 with a good mix of corporate, academic, and public librarians.

Fifteen vendors, including EBSCO, Northern Light, and OCLC, exhibited at table top displays. This local group really makes an effort to generate traffic for the exhibit area—two breaks and two non-compete periods were offered in the exhibits. All exhibitors were given three minute "sound bite" periods at the podium during the main conference for updates on their products and services, and a clever door prize drawing card required vendor initials from every exhibitor, sending attendees flocking to all table-tops.

For more information on this event and the group itself, visit www.scougweb.org.

The National Online Meeting, sponsored by Information Today, is always held in May in NYC. This year's meeting was bigger than ever, drawing over 6000 librarians interested in online services and databases, as well as serials, books, document delivery, CD-ROMs, and more.

Information Today also sponsors the very popular Internet Librarian Conference, slated for its 2nd run this fall in Monterey, CA. The first conference drew 1500-1800 attendees—quite a showing for an inaugural event. Exhibits can't move too quickly on this one—exhibit space is already sold out—but the sponsors are looking for more room.

For more information on National Online and Internet Librarian, see www.infotoday.com.

Electronic Product Trials

Gail Preslar at the Technical Information Center, Eastman Chemical Co. suggests that a trial for an electronic product is important to see how it "really" works, especially in the hands of a non-expert. She prefers four-week trials and concludes that many failed to match the hype of the sales presentation. It is her opinion that testing is critical to getting good value for the money spent and to being able to explain to users the strengths and weaknesses of a given product.

She gives the following advice to librarians:

- ✓ Do simple searches; do hard searches; do the same search with words reversed and note the difference.
- ✓ Make stupid mistakes and see what happens.
- ✓ Logon incorrectly and notice the error message. How helpful is it?
- ✓ Use the system at different times of the day and on different days of the week. Does it seem to matter?
- ✓ If printing is going to be offered, make sure you print... and print again.
- ✓ If the product needs other helper applications, (e.g. Adobe Reader, etc.), do those launch easily and quickly?
- ✓ If you are comparing similar products, do the same searches and notice the difference in the overall retrieval, the timeliness of the coverage, and the coverage from the same sources (e.g., did the search pull the same articles from the same publications?).

By The Numbers

- February, 1998 usage of the JSTOR database of academic journals topped the previous month by 29% and represented a 363% increase over usage from the beginning of the fall 1997 semester. 26,729 articles were downloaded for printing during February, and 89,174 searches were performed. JSTOR also expanded its collection by 10% (250,000 pages) with the February release of the back-runs of five journals.

- The number of public libraries offering access to the Internet has more than doubled in the last two years to 60%. The number is closer to 85% for libraries serving populations of 100,000 or more. In an MCI study of 3,241 Internet users, access location to the Internet is as follows: home, 69%; work, 49%; school, 29%; and alternative points, 16%. Forty-five percent of respondents accessing the Internet from other locations name the public library as their point of access.

- Nearly 70% of ARL libraries outsource collection development. Most use approval plans, 69%, followed by blanket orders, 32% and arrangements with bookstores, 3%. Other services include depository arrangements with agents in foreign countries, arrangements with vendors for special collections and archival materials, and renting bestsellers and popular reading materials. *Against the Grain*, November, 1997, pg. 16.

- Since 1986, the unit cost of serials purchased by research libraries has increased by 147% and that of monographs by 63%. Association of Research Libraries, *ARL*, December 1997, pg. 7.

- Estimated library automated systems revenues for 1997 were \$470 million. Twenty-nine vendors cover the market. On the average, 42% of their revenue comes from software, 26% from maintenance, 12% from hardware, and 20% from "other" products or services such as consulting, training, documentation, database conversion, and additional library products not related to automation. *Library Journal*, Automated System Marketplace '98, April 1, 1998, pg. 43.

Law Library Information Expenditures

The American Association of Law Libraries (AALL) surveyed its academic, government, and private law library members in 1997 to identify the amount they spent on information resources.

The average academic law library information budget was \$780,000. Hardcopy publications represented \$677,700 (87%) while electronic resources were \$102,400 (13%). The survey covered 193 academic libraries.

Governmental law libraries showed a similar mix. Their average information budget was \$317,700 with hardcopy information expenditures at \$269,600 (85%) and electronic at \$48,100 (15%). A total of 271 libraries were surveyed.

For private law libraries, the picture was quite different. Of the 920 surveyed, an average of \$644,900 was spent on information resources, with less than half, \$268,500 (41%), spent on hardcopy while \$376,400 (58%) was devoted to electronic resources.

In a comparison with the overall information budget from 1995 to 1997, the average private library grew by 20.5% while academic and government libraries grew by 2.8% and 3.1% respectively.

Short Takes

The most common reason people use public libraries is for enjoyment or hobbies, including borrowing books or tapes and attending activities. National Center for Education Statistics.

“The core competency of libraries and librarians resides in effectively bringing people with a need to know in touch with the information or knowledge they need, in a discerning and informed way.” *American Libraries*, January 1998, pg. 78.

One of the recently reported findings of the opinion research of the Benton Foundation is, “Americans trust their librarian and count on this person to provide personal guidance to books and information.” They also found that “Americans hold libraries in high esteem.” Joey Rodger, president, Urban Libraries Council, *ULC Exchange*, May, 1998, pg. 1.

Radio and TV were available 38 years and 13 years, respectively, before 50 million people tuned in. The Internet hit that benchmark within four years. Traffic doubles on the Internet every 100 days, and 10 million people made online purchases last year. *Wall Street Journal*, April 16, 1998, pg. A1.

A study of first-year students at Duke University revealed that 85% use the Web for academic purposes at least several times a week. They still visit the library, however, either to use traditional print resources or simply because they like the atmosphere of a university library. Reported in *Library Hotline*, May 4, 1998, pg. 10.

Printing skyrockets 40% in an office when e-mail is introduced. The number of sheets consumed by laser printers in 1996 was 787.6 billion, and this is projected to grow to 1.2 trillion by 2001. Dataquest Inc.

The fastest growing book buying market for the next two years is the age group between 55 to 64 with males increasing their purchases by 30% and females by 33%. *American Demographics*, May, 1998, pg. 11.

Publishers' Web Sites

Publishers use Web sites as another marketing tool to stimulate interest in their products. At the ALA Midwinter, 1998 meeting, librarians spoke out about the features important to them in accessing these sites. Reported in *Against the Grain*, April 1998, pg. 73, the following are some of the points made by Nancy Gibbs, head of acquisitions, North Carolina State University, and Joe Raker, coordinator of technical services, Boston Public Library.

- Include address and phone number on the first page.
- Present an uncluttered, easy-to-read screen featuring simplicity of design.
- Indicate how current the information is.
- Provide searchability by both title and subject.
- Give a directory of employees.
- List answers to frequently asked questions (FAQs).
- Explain copying rights.
- Use icons that serve as prompts and make navigation easier.
- Avoid jargon specific to the company.
- Allow for customer feedback via e-mail links.

Future Issues Will Feature:

- Libraries using Amazon.com
- ALA Summer Conference Hot Topics
- Expanding Access Beyond Library Catalogs
- Credit Card Purchasing By Libraries

Libraries on the Move

Voters in Tulsa, OK overwhelmingly passed an increased millage and a \$22 million bond proposal. Before the election, the library conducted 24 town meetings and visited every neighborhood to gather information on what the community wanted. The result was a plan that emphasized buildings, books, and better access to information. The library's immediate plans are to replace a 15-year old automated library catalog and check-out system, buy new books, install a materials security system in all 23 locations, expand four regional libraries and seven branches, and renovate the Central Library.

Most public libraries are facing the issues of access to the Internet and what to do about filtering. The Fort Vancouver Regional Library, WA, has taken steps to help parents guide their children to appropriate use of the Internet as the parents define “appropriate” within their own families. From the library's newsletter, *Check it Out*, April, 1998 and reported in *Library Administrator's Digest*, they are providing a variety of commercial filtering programs through their home page (www.fvrl.org). By clicking on Filtered Search, a patron will be led directly to search engines that are designed to be “family friendly” but differ in perspective. One offers only educational sites (*Education World*), two point to Christian perspectives (*Christian Web Search* and *Goshen*), two are designed for a general family audience (*One Key* and *NetShepherd Family*), and one is designed for children 12 and under (*Yahooligans!*).

“Educate and Automate” grants totaling more than \$392,000 will be awarded to 507 Illinois libraries during the 1998 fiscal year. The grants will be used to purchase computers and other technology and are funded by the Illinois Secretary of State's office for business-related services.

Library User Privacy

Chuck Hamaker of the University of North Carolina at Charlotte has raised an issue of the librarian's responsibility in keeping private the identity of those users who access electronic journal articles in the *Newsletter on Serials Pricing Issues*, Number 205, March 18, 1998 (editor: Marcia Tuttle, tuttle@email.unc.edu).

He says, “In the rush to meet the common goal of full text access of individuals getting to what they need or want, or are just vaguely interested in, are the protections that libraries provide—a cloak of anonymity, at least regarding in-house use—disappearing with librarians doing little?” As vendors and publishers have specific user data when an article has been retrieved, will they sell the list to the highest bidder or will they turn those names in to their own marketing targets?

Hamaker suggests it is a librarian's responsibility to protect the privacy of users just as much as it is to monitor price, connectivity, and content.

Notable Computer Software

The Association for Library Service to Children, a division of the American Library Association, has announced its list of Notable Computer Software for 1998. The selections are: *The American Girls Premiere*, The Learning Company, Windows/Mac, \$34.99; *Cat in the Hat*, Broderbund, Windows/Mac, \$34.95; *The Digital Field Trip to the Rainforest*, Digital Frog International, Windows/Mac, \$49.00; *My Amazing Human Body*, DK Multimedia, Windows/Mac, \$29.95; *Piano Discovery for Kids*, Jump!, Windows/Mac, \$49.95