



The CHARLESTON REPORT

Business Insights into the Library Market

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Libraries on the Move

Richland County Public Library in Columbia, South Carolina, was named Gale Group/Library Journal Library of the Year for 2001. The library enjoys a per capita budget of \$47 and spends a "significant portion of its budget on materials." *Library Journal*, June 15, 2001.

The Canadian National Site Licensing Project (CNSLP) has signed an agreement with Academic Press' IDEAL service to grant approximately 650,000 academic researchers and students in 64 institutions across Canada access to all 177 Academic Press (AP) journals published electronically on the service. *IDEAL Press Release*, June 8, 2001.

Harvard University Library's \$145,000 Mellon-funded project with Blackwell Publishing, John Wiley, and the University of Chicago Press is one of seven under way this calendar year with grants from Mellon. The others are being coordinated by the university libraries of Cornell, Stanford, and Yale, MIT, the University of Pennsylvania, and the New York Public Library. The projects are aimed at digital archiving, among other challenges. *The Chronicle of Higher Education*, <http://chronicle.com/free/2001/07/2001072001t.htm>.

The Private Academic Library Network of Indiana (PALNI) has received a \$2.65 million grant from the Lilly Endowment, Inc., of Indianapolis to develop an "Advanced Resource Sharing Network to Support Learning." Grant monies will be used to migrate 26 PALNI libraries to a centralized online system over the coming three years. *Library Hotline*, May 21, 2001.

Embargoes and Exclusives: Latest Hot Debates Surround Journal Services

A wide variety of listservs and online discussions over the past few months have been burning up with the issue of publisher embargoes and exclusive arrangements for certain journal aggregating services. The embargoes represent the periods of time (usually set in months, years, or volumes), established by publishers, when online versions of the journal are "behind" the print version. This practice allows publishers to maintain the commercial viability of their print versions, or their own Web versions, but causes online users and libraries concern because the information they are seeking is incomplete or unavailable.

The number of embargoed journals on various services, such as EBSCOhost, ProQuest and InfoTrac, as examples, has only recently been made very public, thanks to active and lively discussion over the net. As an example, *TCR* reported in our last issue that 1,460 of EBSCO's 2,947 fulltext titles have an embargo period of 3 months or longer, with 1,081 titles (36.7%) having an embargo period of at least 12 months. This information was posted to liblicense-l on May 15, 2001.

Exclusivity is a separate issue and one which is equally troubling to librarians. And, again, it is EBSCO that is making the most news in this area, after announcing several high-profile exclusives (most notably with the *Harvard Business Review*). What exactly does an exclusive mean in this scenario? It means that libraries are forced to use a single service to access the online version of a desired publication. In real terms, that means that anyone looking for the online version of *HBR* must know that it is only available on EBSCO's online services and therefore, must use EBSCO.

A recent study published in *Searcher* by Larry Krumenaker, of Hermograph Press, took a statistical look at "Exclusive and Unique Titles" on the three most prominent aggregated journals services. Krumenaker used the latest available lists of holdings for EBSCOhost, InfoTracWeb, and ProQuest Direct and compared them with each other. He also compared the lists against the database of Web periodicals which are included in the Hermograph Press' monograph *Net.Journal Directory* and its online Net.Journal Finder. The study looked at two possibilities:

- **Unique.** Did Journal X appear on one of the three services, and only one? But did it also appear on "commercial search services" such as Dialog, Lexis-Nexis, or Dow Jones, where it could be accessed by anyone with a credit card.
- **Exclusive.** Did Journal X only appear on one of the services and NOT on any of the "commercial search services." This would be the case of a true publisher exclusive.

A summary of the study's findings follow. Note that the percentages quoted represent the number of "unique" titles which could be found on the commercial service alternatives:

<u>Service</u>	<u>Total Titles</u>	<u>Unique Titles</u>	<u>On L-N</u>	<u>On Dialog</u>	<u>On Dow Jones</u>
EBSCOhost	4,039	2,170	15%	16%	8%
ProQuest Direct	3,602	1,742	32%	35%	47%
InfoTrac Web	2,784	1,160	50%	62%	28%

How many titles appeared on all three services? 827. On two of the three? 391 or 632, depending on the two compared.

EBSCOhost did top the list with 54% of its titles unique to it. However, ProQuest could boast 48% unique and InfoTrac 42% unique. Of exclusives, EBSCOhost could say that roughly 85% of its unique titles are actually exclusive, that is, not available anywhere else. But, one should note that while *Harvard Business Review* is exclusive to EBSCOhost in the academic market, it can still be found on Dialog, Lexis-Nexis, and Reuters Business Briefing.

The study's author also analyzed embargoed titles on EBSCOhost and found that, excluding newspapers, there were only 932 titles (18%) with embargoes. Of these, 588 (63%) were embargoed for one year. Only 52 titles (1%) had embargoes of more than one year.

Excerpted from "A Tempest in a Librarian's Teapot," Searcher, July/August 2001.

Short Takes

In a widely publicized announcement, six major publishers of medical journals (Blackwell Science, Elsevier Science, the Harcourt Worldwide STM Group, Lippincott Williams & Wilkins, Springer-Verlag, and John Wiley & Sons) have agreed to give researchers in developing countries online access to their publications free or at highly discounted prices. The agreement covers 1,000 of the top 1,240 medical journals and will be extended to medical schools and research institutions in more than 60 countries where the per-capita gross national product is \$1,000 or less. Another 30 countries will qualify for smaller discounts. *New York Times*, July 9, 2001.

The Institute of Museum and Library Sciences has awarded more than \$1.8 million to support seven colleges in their efforts to recruit and educate students in library and information science. The awards will also provide advanced training, especially in digital technologies, to professional librarians. Recipients and award amounts are: Indiana University, \$73,005; Mansfield University of Pennsylvania, \$356,491; Montgomery College (Tex.), \$268,491; Texas Woman's University, \$77,520; the University of Arizona, \$492,708; the University of Denver, \$233,204; and the University of Kentucky, \$329,427. For more information, logon to www.ims.gov.

Questia Media, the Houston-based online library service for college students that launched in January, has signed up its first college client. Elmhurst College, a liberal arts college of about 2,700 undergraduate and graduate students in Elmhurst, Illinois, will begin using the Web-based service this fall. The college will pay subscription fees for usage by about 300 students. Publishers will receive a small fee every time a user views a page of one of their books on the service. Questia had anticipated having more than 50,000 books in its virtual library, but is presently offering about 35,000. For more information on Questia, logon to www.questia.com.

In an effort to bring the debate about the future of scholarly and scientific publishing to a wider audience, *Nature* magazine has invited leading representatives of the main groups of stakeholders and observers from the mainstream Internet industries to express their views in 1,000-word articles. The result is a good overview of the interested parties in the debate and the various solutions proposed from the library, publishing, and scientific communities. Be sure to check it out at: www.nature.com/nature/debates/e-access/.

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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.

For comments and contributions, contact Rebecca T. Lenzini, <rlenzini@charlestonco.com>, Editorial Offices, 618 South Monroe Way, Denver, CO 80209. 303-282-9706, FAX 303-282-9743, (c) Copyright, The Charleston Co., 2000. All rights reserved. ISSN 1091-1863.

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By the Numbers

225%... is the increase in part-time students in library schools in the 20 year period from 1979/80 to 1998/99. Full-time students in that same period increased 10.3%. *Against the Grain*, June 2001.

\$49,068... is the mean ARL library professional salary for 2000-2001, according to the *Association of Research Libraries (ARL) Annual Salary Survey*. *Library Hotline*, April 2, 2001.

63%... of online shoppers "ditch" their transactions when they are presented with additional shipping costs, according to Jupiter Media Matrix. *Wall Street Journal*, June 27, 2001.

\$1.62 billion... was the total of sales of online resources in the U.S. in 1999, an increase of 14.3% over the previous year, according to the U.S. Census Bureau. Multi-media products rose 8.4%, to \$811 million. The two categories combined to represent 10.1% of total publishing industry revenues in 1999 (compared to 9.6% in 1998). *Publishers Weekly*, February 26, 2001.

60%... of Internet users in a recent survey said that online purchases should be taxed. In the same survey, 79% stated that the Internet had made their lives easier. *New York Times*, July 10, 2001.

421... job seekers and 621 available jobs attempted to connect at the placement center of the American Library Association's Annual Conference in San Francisco. The previous annual conference in Chicago saw 1,004 jobs and 481 job seekers. *Library Hotline*, June 25, 2001.

18%... of Reed Elsevier's annual revenue is represented by science and medicine; legal is 31% and education is 5%. Business divisions, including Cahners, account for the remaining 44%. Total revenue is 3.8 billion British pounds. *Wall Street Journal*, July 10, 2001.

670,000... is the number of journal articles accessed and delivered in May 2001 from ingenta, now encompassing both UnCover and CatchWord. This figure represents a 400% increase over the same period one year ago. *Press Release*, July 16, 2001.

TCR Quote

"Traditional publishers are unnecessary in the digital world," says Stephen Riggio, acting chief executive of BarnesandNoble.com. In an article on eBook rights, Riggio notes that his site has plans to begin publishing its own digital editions of older works. *New York Times*, July 19, 2001.

Mark Your Calendars

NASIG 2002 will be held at the College of William & Mary, Williamsburg, Virginia, from June 20-23, 2002. NASIG is the North American Serials Interest Group.

The 21st Annual Charleston Conference takes place from November 1-3, 2001 with Preconferences and **The Charleston Advisor** Vendor Showcase set for October 31, 2001. This year's theme is "The Trends They Are A'Changing." Don't miss this important meeting. Register online for the main conference at www.cofc.edu/library/conference. To register for the Vendor Showcase, send an email to <rlenzini@charlestonco.com> including your company name, email address, and fax number.

TCR Reports...ALA Hot Topics By Katina Strauch, reporting for TCR

ALA was incredibly subdued this year. No big mergers were announced at the show and no really new products that we hadn't seen before.

eBooks — There was still much talk about eBooks, but with this meeting there was a lot of discussion as to why they haven't taken off the way they were expected to. Publishers still seem compelled to have some level of eBook production, but the outlook is cautious.

Selling direct/cutting out the distributors — Some publishers, especially the bigger publishers with more content, have made more of a push to market their products (including eBooks) direct to faculty, students, or other users. Libraries don't like this, but it continues to be a trend to watch. The November issue of *Against the Grain* will feature articles on this subject.

Embargoes — There was a lot of talk of embargoing (that is, holding off online access of particular issues of journals, usually the current year or multiple recent years). Librarians don't like this practice, but for many publishers this seems to be a necessity to continue their print profit streams. (See related article in this issue of *TCR*.)

Reference publishing — Is there less going on than in the past? *Choice* reports that the number of reference books received for review has dropped, but a lot of publishing in this area still continues.

Two related overheard quotes — "Reference librarians never leave their chairs anymore." "More and more title decisions are made at the Consortial level."

Two New Lists for eBooks and eResources

LIS-E-JOURNALS@JISCMail.AC.UK is a new list for the discussion of e-books primarily intended for the use of UK academic librarians and other interested parties. To join the list send "join lis-e-books (first name) (last name)" in the body of an email message with nothing in the subject box or below the message (no autosignature) to: <jiscmail@JISCMail.AC.UK>. The listserv is part of the UK government's Distributed National Electronic Resource (DNER) and is sponsored by JISC (the UK's Joint Information Systems Committee).

Electronic Resources in Libraries (ERIL) is a forum for librarians who are involved with selection, acquisition, or management of electronic resources at their institutions. Examples of issues covered include: collection development policies, electronic journal holdings, use statistics, licensing and negotiation, product set-up and maintenance, and specific product issues. This is a private list that requires the list-owner's approval for subscription. To learn more, visit www.topica.com/lists/eril.

Don't Miss This!

CNI Executive Director Clifford Lynch's most recent article, "The Battle to Define the Future of the Book in the Digital World," is available in the June edition of *First Monday*, a peer-reviewed journal on the Internet. The article offers a comprehensive survey and analysis of the technological, legal, economic, and intellectual challenges associated with publishing in the digital age. To check out the article, logon to www.firstmonday.dk/issues/issue6_6/lynch/index.html.

Amazon — Word on the street is that Amazon.com will begin taking institutional purchase orders this fall. Some feel this is too little, too late, but this appears to be a significant step toward the library market by a major online vendor.

Statistics — Both actual compilation and standards for compilation of statistics are needed. Print statistics in libraries are going down, yet it is clear that online use is booming. Some sort of standard way for measuring online use by library patrons is needed.

Virtual reference service — The new project between OCLC and LC to provide virtual reference service was on the tongues of many reference librarians.

Library instruction — Collaboration with faculty/end users to integrate library instruction into academic courses is moving forward. Co-teaching with faculty is a new trend though the necessary time and resources are issues which must be grappled with.

Shortage of traditional librarians — A lot of libraries and companies are crying for traditional librarians who are trained in, for example, acquisitions and collection development. There is a move away from traditional library work by many graduating library/information schools which is causing a serious shortage of knowledge in these areas. This topic (and many more!) will be discussed in detail at the 2001 Charleston Conference in Charleston, SC, November 1-3, 2001. For more info or to register logon to www.cofc.edu/library/conference.

TCR MARKETING TIP: Making the Most of the Sales Call

Excerpted from "Issues in Vendor/Library Relations—The Sales Call" by Denise Novak, Head of Acquisitions, Carnegie Mellon University Libraries, Against the Grain, June 2001.

- Rule #1:** Make an appointment. There is nothing worse than a "cold call."
- Rule #2:** Let me know about new services your company is adding (or dropping).
- Rule #3:** Likewise, tell me about staff who are new to your company or staff who are leaving.
- Rule #4:** If you are new, introduce yourself with references, business cards, and brochures.
- Rule #5:** It's important to be pleasant. Many vendor reps are considered personal friends.
- Rule #6:** Lunch and/or dinner is a treat, but feeding me is not a requirement of a visit.
- Rule #7:** It's the rep's business to ask for business. Reps must stay focused on that essential purpose and librarians must respect this.
- Rule #8:** The best vendor reps ask questions and listen as much as they talk.

Charleston Advisor Readers' Choice Awards Best and Worst

For the first time, *The Charleston Advisor* is sponsoring a series of awards for the best and worst electronic services and databases for libraries. The awards are not necessarily limited to products covered in *TCA* but the reviews were consulted in the final consideration. These awards will be published on an annual basis in the July issue of *TCA*. Votes were taken on the *TCA* Website and additional input was received from the *TCA* editorial board.

Best New Product

Nominated by the Board: Alexander Street Press, **Runner up:** AccuNet/AP MultiMedia Archive

Nominated by Users: SFX (ExLibris), Gale Business Research Center, LSSI Virtual Reference Desk, netLibrary, Women Writers Online

Best New Product (*not yet released, but anticipated*)

... by the Board: eBrary, American Council of Learned Societies (ACLS) History E-book Project

Most Improved Product

... by the Board: Project Muse, **Runner up:** ABI-Inform

... by Users: UnCover@ingenta, Cambridge Scientific Abstracts (CSA), ISI Web of Science, Journals@Ovid

Best Interface

... by the Board: Columbia International Affairs Online (CIAO), **Runner up:** California Digital Library (CDL)

... by Users: Ovid, Wilson Omnifile, iBistro, CSA Medline (IGW), HighWire

Best Content

... by the Board: Softline, ABC-Clio, ALLDATA, MathSciNet, Grove's Scientific American

... by Users: ISI Web of Science, CSA, JSTOR, HighWire

Best Pricing

... by the Board: Project Muse

... by Users: ResearchIndex, WilsonOmnifile, LSSI Virtual Reference Desk, CSA, Women Writers Online, Blackwell Science/Munksgard

Best Contract Options

... by the Board: American Mathematical Society

... by Users: SPARC journals, Wilson, CSA

Best Customer Support

... by the Board: FIS-Online

... by Users: CSA, ProQuest, HighWire

Best Effort

... by the Board: netLibrary

... by Users: netLibrary, Bowker, Science Direct, BioOne

Vaporware

... by the Board: DRA TAOS

... by Users: Questia, DRA TAOS, LOCKSS

Lemon Award Users only! ... Britannica, FirstSearch, DRA TAOS, PsycInfo on SilverPlatter, Mosby on IDEAL

Special Board Awards

Enlightenment (*for listening to users*): Nature

Products to Watch: Serials Solutions, Serials MasterFile

Be sure to check out this article and many more available free in fulltext in *TCA's* latest issue, v .3, no.1, July 2001, available at www.charlestonco.com/toc.cfm?iss=v3n1.

How About It?

ERIC Shareware: Electronic Resources and Licensing Information Center

In 1999, the Pennsylvania State University Libraries developed a Microsoft Access database file (ERIC) to track electronic resource acquisitions both at a title and aggregated service level. Since that time, the ERIC database has been utilized to record information regarding authentication, usage, license data, supplier contact information, etc. Currently, the Libraries also use the database to create the monthly fulltext list of electronic resources on its homepage, to capture supplier and local usage statistics, and to extract data files for UnCover, among many other uses.

ERIC has now been offered to all interested parties as shareware in an as-is format. No technical support is provided, and ERIC remains copyrighted by Penn State University; however, interested parties are welcome to modify the file to suit individual library needs. To download, go to <ftp://anonymous.libraries.psu.edu/erlic>.

Web Press Release, June 28, 2001. For more information, contact Jeff Martin at 202/467-0265.

A Profile of Online Shoppers

A recent study conducted at Brigham Young University divided Internet users into eight psychological profiles.

- Shopping Lovers (11.1% of Internet users). Enjoy shopping online; do it frequently.
- Adventurous Explorers (8.9%). Think online shopping is fun, but use the Internet for other activities.
- Suspicious Learners (9.6%). Reluctant to buy online.
- Business Users (12.4%). Computer literate, but use the Internet primarily for business, not shopping.
- Fearful Browsers (10.7%). Spend time "window shopping" online but worry about credit card security and buying products sight unseen.
- Fun Seekers (12.1%). See entertainment value in the Internet but are wary of shopping online.
- Technology Muddlers (19.6%). Show little interest in improving Internet and computer skills; spend less time online than other categories.
- Shopping Avoiders (15.6%). Have money for shopping, but like to see merchandise before buying and don't like to wait for products to be shipped.

Source: *New York Times*, July 9, 2001.

Coming in Future Issues

- How and Why are Libraries Changing? Findings from the Digital Library Federation Survey
- Copyright Roundup: What Does Tasini Really Mean for Us
- Moving from Print+Electronic Pricing to Electronic+Print Pricing: Will Subscription Agents Suffer?
- Previews of Charleston Conference Sessions