



The CHARLESTON REPORT

Business Insights into the Library Market

MAY / JUNE 2002

VOLUME 6, NO. 6

Libraries on the Move

The University of Arkansas Libraries have received a pledge of \$28 million from the Walton Family Charitable Support Foundation in Bentonville, Arkansas. Of the total, \$23 million will be used as an endowment for acquisitions, while \$5 million will become an immediate acquisitions fund. The funds are part of an overall donation to the University worth \$300 million, the largest gift ever received in the history of U.S. public higher education. *Library Hotline*, April 22, 2002.

The Omaha (Nebraska) Public Library is the winner of the 2002 Grolier National Library Week Grant for its "Find your story @your library" campaign. Winners of the 2002 Excellence in Academic Libraries Awards, sponsored by the Association of College and Research Libraries (ACRL) and Blackwell's Book Services, are the Andrew G. Truxal Library at Anne Arundel Community College, the Cornell University Library and the Oberlin College Libraries. *ALA News*, April 2002.

The Association of Research Libraries (ARL) has announced the launch of the Scholars Portal Project, a collaboration between seven ARL member libraries and Fretwell-Downing Inc. (FD). The initial libraries participating in the project are the University of Southern California, University of California - San Diego, Dartmouth College, University of Arizona, Arizona State University, Iowa State University, and the University of Utah. Plans call for expanding the number of participating libraries over the course of the three-year project. The goal of the Scholars Portal is to create a "super discovery tool" for scholars, which can search, aggregate, integrate, and deliver licensed and openly available digital content across a broad range of subject fields and from multiple institutions. To read the full report on the project, logon to www.arl.org/access/scholarsportal/final.html.

Indiana University's Digital Library Program has received a \$239,000 grant from the National Endowment for the Humanities to digitize and publish on the Web the *Film Literature Index*, published since 1973 by the State University of New York at Albany. The index is considered to be the authoritative work in the field, with over 500 library subscribers to its paper-based edition, including 150 outside the U. S. The project will provide index information for roughly 564,000 articles. Full-text content is not included. *Academic Newswire*, April 30, 2002.

Key Issues for Academic Librarians: A Grassroots Chat

The following key issues and topics are among many identified by participants in a recent moderated chat session held by the Association of College and Research Libraries (ACRL) on "Academic Library Futures: Identifying Strategic Issues," moderated by Maureen Sullivan, library consultant and immediate past-president.

- consolidation of the information industry;
- overuse of Web information;
- reliance on database producers to do "screening" of resources;
- redefining academic libraries;
- building effective faculty-library instruction plans and team approaches to learning;
- avoiding duplication of effort in Web development;
- the drop in the number of reference transactions;
- erosion of the concept of research and lack of recognition of authoritative sources;
- for-profit competitors in higher education.

But one librarian noted: "Information is very resistant to commodification. You can't stop by the 7/11 on the way home and pick up a six pack of information!"

On a personal level, issues included:

- lack of diversity;
- need for stronger foreign language skills;
- low librarian salaries;
- redefining the work of reference librarians.

One participant summed it up this way: "It's more than just space; it's the idea of being called librarian. If we are distributing more services (as a competitor to other information providers), then why do we call ourselves librarians. Librarian is defined (by the dictionary) as one who is in charge (or works) in a library. We cannot afford to define ourselves by bricks and mortar, but by refining the relationships we establish within and to an extent, external to our organizations."

The complete Chat Archive makes fascinating reading and is located at http://library.tamu.edu/21stcentury/new/chat/chat_maureen_archive1.asp.

TCR Quotes

"If we define 'primary' as the market that we are going after first, then it is libraries," Christopher Warnock, CEO of ebrary, in answer to the question, "What do you now consider to be ebrary's primary market?" *Librarian's eBook Newsletter*, April 2002, www.lib.rochester.edu/main/ebooks/newsletter2-4/warnock.htm.

The Library as Place: Design Trends in Library Buildings

Each year for the past six years, the U.S. has invested between \$500-700 million in new library buildings and renovations. Despite budget troubles at present, this figure appears to be holding firm. Listed below are a sampling of design trends helping to make public libraries more comfortable and attractive to users.

- Reading and study spaces, featuring more table and chair ensembles and soft seating, and fewer individual study carrels;
- Collaborative workspaces, popular for group study and tutoring, often designed to be out of sight or partially secluded;
- Spaces for groups, answering the demand for more and more community spaces and meeting rooms;
- Learning and teaching spaces, with fully wired and flexible designs which serve as both instruction rooms and overall public access computing labs;
- Technology-free zones, provided to honor library user requests for quiet places with no computing or associated noise;
- Archives, special collections, and exhibit spaces, featuring displays which showcase local collections or themes, and which can be reconfigured quickly to address topical issues;
- “What’s New” spaces, copying the marketing techniques used by bookstores and featuring staff recommendations on videos, CDs, books and other resources;
- Cultural events spaces, usually elegant and devoted to lectures, author readings, films, concerts, books arts and dramatic events;
- Age-specific spaces, such as those designed specifically for teen-agers or for older adults with special needs;
- Shared spaces, used as multi-use facilities between various organizations including city halls, schools, senior centers, etc.;
- Art spaces, featuring permanent collections and short-term exhibitions.

Excerpted from “Esprit de Place,” by Sam Demas and Jeffrey A. Scherer, *American Libraries*, April 2002.

The Charleston Report, Business Insights into the Library Market is published six times a year by The Charleston Co., 618 South Monroe Way, Denver, CO 80209. 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 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., 2002. All rights reserved. ISSN 1091-1863.

Editor: Rebecca T. Lenzini

Editorial Board: Katina Strauch, Linda F. Crismond

Chief Financial Officer: Rebecca T. Lenzini

Publisher: The Charleston Co.

Graphic Design: Toni Nix • Masthead Design: Jack Thames

By the Numbers

80%... of more than 3,200 students and faculty members who responded to a recent survey conducted by the Digital Library Federation and Outsell Inc. stated that the Internet has changed the way in which they use campus libraries. Over one-third of the respondents overall and half of those in fields such as business and engineering now use the library less than they did just two years ago. www.clir.org/pubs/issues/issues27.html#national.

14,435... individuals purchased “symbolic” square feet at the price of \$20/foot in the new \$70 million Memphis-Shelby County Public Library & Information Center in Memphis, Tennessee. The funds were part of a “foothold on the future” campaign. The final tally for the fund raiser was \$288,709. Memphis-Shelby County *Press Release*, February 19, 2002.

75%... of journals indexed in the *Social Sciences Citation Index* are available online in 2002 versus only 30% in 1998. According to EBSCO’s records, fewer than 75 peer-reviewed titles were available electronically in 1994, while 7,623 e-journals are now listed in its order file. “Periodical Price Survey 2002,” *Library Journal*, April 15, 2002.

99%... of those who attended the March 2002 9th National PLA Conference and who completed the association’s online evaluation form stated that they had visited the exhibits. Of note, 73% indicated that they visited the exhibits three times or more. *ALA News*, April 2002.

\$535.1 billion... is the total value of “copyright industries in the U.S.” according to the American Association of Publishers (AAP). The figure includes revenues from books, movies, business and entertainment software, as well as music and sound recordings. The figure represents 5.24% of U.S. Gross Domestic Product (GDP) for 2001. *Library Hotline*, April 29, 2002.

56%... of 18- to 19-year olds and 39% of 12- to 17-year olds now use the Internet more than the telephone to communicate with family and friends, according to a recent survey which polled 6,708 teens and parents. *American Demographics*, April 2002.

42.5%... of dot-com addresses in 515 hyperlinks studied by two researchers at the University of Nebraska were lost after only 20 months. The problem of “link rot” extends to others as well: 18.8% of total links studied had disappeared, including 11% of dot-org addresses and 18.4% of dot-edu’s. *Wired*, April 24, 2002. <http://wired.com/news/infostructure/0,1377,51700,00.html>.

In the News

Amazon.com got highest marks in a recent *New York Times* article entitled “Book Bargains to Warm a Mommy’s Heart,” by Michelle Slatalla. The author ordered used books from three Internet sources: Amazon, BookFinder.com and Half.com. Though the used books she purchased at Amazon were more expensive (but by only \$1.40), the author concludes that the convenience of the site’s “superior navigational tools” warranted the extra cost. Ironically, it was Amazon’s recent dispute with the Authors Guild over the sale of used books that brought the site to the writer’s attention. *New York Times*, May 16, 2002.

New ALA Studies Show Public Library Usage Up

Two new national studies commissioned by the American Library Association as part of its National Library Week observance have determined that library use is up and that support for libraries is high.

The University of Illinois Library Research Center (LRC) studied library use over the last five years at the 25 U.S. public libraries that serve populations of 1 million or more. Using statistical analysis, the LRC found that circulation in March 2001 (the beginning of the recession) was 8.3% higher than would be expected from the trend observed since January 1997. Following the events of September 11, circulation in October 2001 exceeded the trend by 11.3%.

In a separate survey from KRC Researching and Consulting, also released by ALA, polls found that, overwhelmingly, adults are satisfied with their public libraries (84% compared to 7% who were not satisfied). While current public library spending per capita is \$25, more than half of those polled believe \$26 to \$100 per capita should be spent to support libraries. With more than 16,000 public library outlets, librarians have an extensive reach in most communities nationwide. More than 80 new public library buildings opened last year, representing an estimated nationwide investment of \$414 million, according to ALA.

KRC Research & Consulting conducted the “@ your library™: Attitudes Toward Public Libraries” study, which polled about 1,000 adult Americans in a national random-sample telephone survey conducted March 8-11. The estimated margin of error is 3%. The survey also found:

- Of adults visiting libraries, those aged 25-34 visit the most often — 24 times per year. On average, library users head to the library an average of 13 times a year;
- More than two-thirds of adults with children under 18 say they visit libraries with their children;
- 62% of adult Americans say they have a library card. Adults with children are most likely to have a library card (73%);
- The library is most often used for educational purposes (46%), followed by entertainment (41%).

In addition to asking Americans about their library habits, the survey also sought to gauge public perceptions of libraries. The ALA found that:

- 91% believe libraries are changing and dynamic places with a variety of activities for the whole family;
- 90% believe libraries are places of opportunity for education, self-help and should offer free access to all;
- 88% agreed libraries are unique because they have access to nearly everything on the Web or in print, as well as personal service and assistance in finding it;
- 83% believe free people need free libraries; and libraries and librarians play an essential role in our democracy and are needed now more than ever; and
- 81% agreed that librarians are techno-savvy and on the forefront of the Information Age.

For more information visit www.ala.org/news/v8n5/studies.html.

Don't Miss This!

COUNTER (Counting Online Usage of NeTworked Electronic Resources) is a new, international, multi-agency project whose objective is to develop a single, internationally accepted Code of Practice that will make it possible to compare usage statistics across journals and databases from different publishers.

Among the participating members of COUNTER are:

- [AAP, the Association of American Publishers](#)
- [ALPSP, The Association of Learned and Professional Society Publishers](#)
- [ARL, Association of Research Libraries](#)
- [ASA, Association of Subscription Agents and Intermediaries](#)
- [BIC/EDiEUR, Book Industry Communication/The European Group for Electronic Commerce in the Book and Serials Sectors](#)
- [JISC, Joint Information Systems Committee](#)
- [NCLIS, National Commission on Libraries and Information Science](#)
- [NISO, National Information Standards Organization](#)
- [PA, The Publishers Association](#)
- [STM, International Association of Scientific, Technical, & Medical Publishers](#)
- [UKSG, United Kingdom Serials Group](#)

The organization's Website provides a source of up-to-date information on the project, as well as a list of Founding Sponsors and Steering Group members. Check it out at <http://www.projectCounter.org>.

Short Takes

The Council of Library and Information Resources (CLIR) will publish full results of its Mellon-funded Digital Library Federation study, entitled “Dimensions and Use of the Scholarly Information Environment,” sometime this summer. To learn more about the preliminary findings visit <http://www.clir.org/pubs/issues/issues27.html#national>.

The Bill and Melinda Gates Foundation's U.S. Library Program is nearing its scheduled end in 2003. By the finish date, the program will have placed 40,000 computers in nearly 10,000 libraries in all 50 states. Training and installation, a part of the Foundation's \$250 million commitment, has already been completed in 25 states. The program was aimed at bringing the Internet to low-income communities. *Library Hotline*, March 25, 2002.

After six months, it appears that only 100 or so of the more than 30,000 members of the Public Library of Science (PLOS) who pledged to boycott journals that don't make their content free online after six months have actually followed through on that threat. Most state that they have made few if any changes to their current practices; the same is also true of both commercial and society journal publishers. *The Chronicle of Higher Education Daily News*, May 16, 2002. <http://chronicle.com/free/2002/05/2002051601t.htm>.

Against the Grain Annual Survey Report 2002

Profile of Respondents

- 56%...academic librarians
- 22%...technical services
- 11%...special librarians
- 11%...reference librarians
- average experience: 21 years

Budgets

- 71%...report increasing budgets
- 15%...report decreasing budgets
- 7.6%...average increase in budget (down from 9% last year)
- 15.5%...average increase in electronic resources budget (up from 13.5% last year)

Spending Patterns

- 25%...of budget is allocated to books (vs. 28% last year)
- 50%...allocated to journals (same as previous year)
- 13%...allocated to electronic serials (vs. 6% last year)
- 6%...to online resources
- 4%...Miscellaneous
- <1%...CD-ROMS

Other interesting facts and figures

- 54%...of those surveyed will cancel paper journals in favor of electronic if possible
- 60%...use commercial document delivery
- 60%...of institutions represented offer distance education
- 44%...of those surveyed have merged with their computer centers (vs. 15% last year)
- \$22,156...is the average amount of subscriptions canceled

Be sure to read the full report in *Against the Grain*, April 2002, pages 52-54.

Did You Know?

Multnomah County Library, in Portland, Oregon, is the oldest U.S. public library west of the Mississippi. The Library started in 1864 as a private subscription library but opened its doors to the public on March 10, 1902, and is celebrating its centennial this year. For more information, logon to www.mulcolib.org/news/index/html.

Every year, *Library Systems Newsletter* publishes a survey of integrated library system vendors for the March and April issues of the Newsletter. As a free bonus on The Source Online, ALA TechSource is providing access to complete reports of the 2001 ILS vendor data. To access vendor info, logon to the *Library Systems Newsletter* April Bonus at https://www.techsource.ala.org/lisn_april_bonus.htm.

Mark Your Calendars

The Charleston Advisor will sponsor two top-notch Preconferences to this year's Charleston Conference. A conference flyer and registration is included with this issue of *TCR!* You can also register online at <http://www.cofc.edu/cdconference/>.

The Lightsey Conference Center — Wednesday, Oct.30, 2002

8:00 a.m.-12:15 p.m. — Report from The Ingenta Institute: "The consortium site license — is it a sustainable model?" — Although consortium licensing is undoubtedly producing benefits, more original data is required to determine whether this model can be sustained. The current research studies from the Ingenta Institute are designed to identify the salient issues to be resolved in arguing this question. Speakers, including Carol Tenopir and Don King, will evaluate the results and conclusions from this research, and the most significant implications. Cost: \$125 library rate; \$195 corporate rate.

1:00 - 4:00 p.m. — On the Road to Article Linking (Redux) — What is article linking all about? Talk with representatives from Serials Solutions, CrossRef, SFX, TDNet, OCLC and others about how their products and services work, and listen to library implementors describe what's really happening. Moderated by George Machovec, Managing Editor, *The Charleston Advisor*. Cost: \$65

How About It?

IEEE (the Institute of Electrical and Electronics Engineers), under pressure from its authors and others, has agreed no longer to require authors to sign a form promising not to violate the Digital Millennium Copyright Act (DMCA). Scholars have expressed concerns that the wording in the act is vague, difficult to enforce, and could prevent important studies from dissemination. The organization notes that the change in its copyright form, expected this summer, do not absolve authors of their responsibility to abide by the law, but only changes IEEE's reference to the law. <http://chronicle.com/free/2002/04/2002041802t.htm>.

NSF to Open Six New Centers

The National Science Foundation (NSF) has announced plans to open six new Science and Technology Centers, at Boston University, the University of California at Davis, the University of California at Los Angeles, the University of Illinois at Urbana-Champaign, the University of Minnesota-Twin Cities, and the University of Washington at Seattle at a total funding cost of \$115 million over a five-year period. The centers will support education and research on a variety of topics, including space science, water-purification techniques, and information-technology. The Science and Technology Center program was created in 1987 to support "basic research and education activities and to encourage technology transfer and innovative approaches to interdisciplinary activities." To date, the NSF has established 30 such centers. *Chronicle of Higher Education*, Monday, May 6, 2002. <http://chronicle.com/daily/2002/05/2002050607n.htm>.

Coming in Future Issues

- ALA Hot Topics
- Report from Amsterdam 2002/ The Fiesole Retreat Series
- What User Studies Are Saying
- The Coming Shortage of Librarians and What It Means for Business