



PUBLISHERS
COMMUNICATION
GROUP, INC.

Global Electronic Collection Trends in Academic Libraries: 2004

A STUDY CONDUCTED BY PUBLISHERS COMMUNICATION GROUP, INC.

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I. Introduction

This report is intended to be the first in the annual series *Global Electronic Collection Trends in Academic Libraries*.

Publishers Communication Group, Inc., a subsidiary of Ingenta that provides consulting and marketing services to publishers, developed a web-based survey that was administered to 155 librarians from academic libraries throughout the world between February 2004 and May 2004.

The academic library landscape has experienced major changes in recent years especially regarding the topic of electronic resources. The demand for electronic access to resources continues to grow, expressed in the requests of faculty members and students alike. As libraries work to address these demands, many questions develop that have serious repercussions for scholarly publishers.

- Are libraries collecting more electronic resources than three years ago?
- Are academic libraries collecting electronic resources directly through the publisher, or are they instead turning to subscription agencies, third party suppliers or consortia?
- How many academic libraries cancel print subscriptions when the content is available electronically?

Furthermore, Open Access journals and the ideologies behind their creation continue to weigh on librarians' collection decisions. At this time it is vital that publishers and content vendors understand the significance of these resources in the collections of academic libraries and the way they have influenced collection decisions.

Publishers Communication Group, Inc.'s Global Electronic Collection Trends in Academic Libraries: 2004 examines many of these questions and more to develop a clear picture of the factors that influence the collection of electronic resources and the impact of Open Access publications and content on library collections.

Some key findings of the survey include:

- The leading factor influencing the collection of electronic resources is stated library policy, followed closely by the preference of faculty members and of students.
- 84% of respondents reported that their institution had cancelled print subscriptions when the content was available electronically.
- The majority of respondents (67%) indicated that their institution catalogs or indexes peer-reviewed Open Access journals and content.
- Only 9% of respondents' institutions have cancelled a subscription when comparable content was available through an Open Access publication.

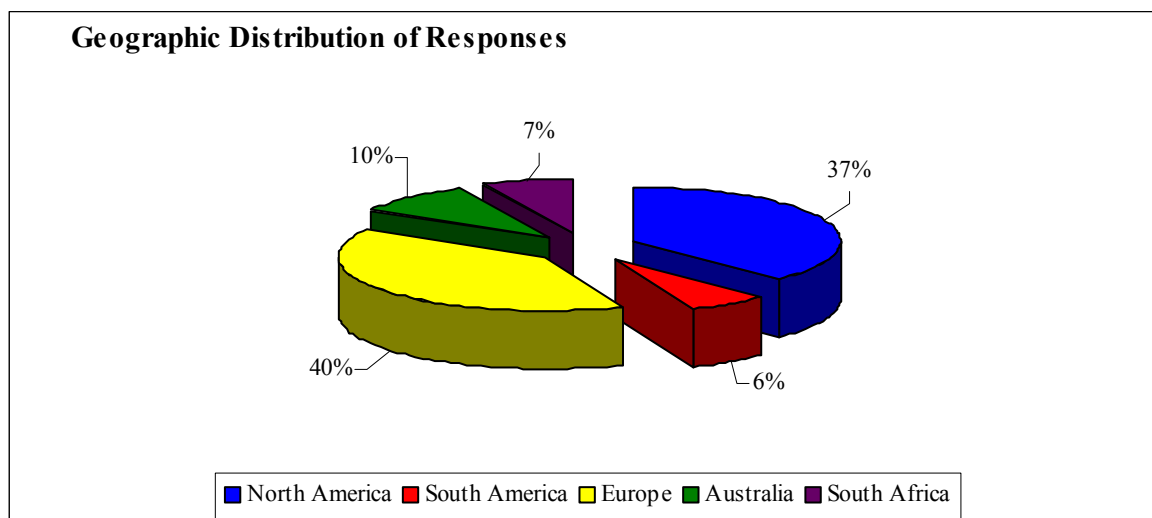
II. Summary Results

Methodology and Demographics

Publishers Communication Group, Inc. developed a web-based survey that was administered to 155 librarians from academic libraries throughout the world between February 2004 and May 2004. To solicit participation, electronic resources librarians, collection development librarians and library administrators were contacted. In some cases, as reflected by the diversity of roles held by respondents, the librarian contacted forwarded the survey to another member of the staff that was better suited to respond to each of the questions. Institutions contacted were categorized by FTE and geography. The surveys distributed were presented in the language spoken by a majority of residents in each country.

Geography

Geographically, Publishers Communication Group, Inc. focused on five major markets: North America (Canada, Mexico and the United States), South America (Brazil and Argentina), Europe (Belgium, France, Germany, Italy, The Netherlands, Switzerland and the United Kingdom), Australia, and South Africa.



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Institution Size

Respondents represented institutions of varying sizes based on FTE. 110 respondents provided this information (71%).

Institution Size	# of Responses	% of Total Responses
1-1,499 FTE	7	6%
1,500-2,499 FTE	5	5%
2,500-4,999 FTE	11	10%
5,000-9,999 FTE	13	12%
10,000-24,999 FTE	48	44%
25,000-49,999 FTE	24	22%
50,000+ FTE	2	2%

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Role of Resndent

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current role within the library. 10/ respondents provided this information (69%).

Function	# of Responses	% of Total Responses
Collection Development	15	14%
Administration	15	14%
Reference	3	3%
Electronic Resources	17	16%
Acquisitions/Technical Services	41	38%
Other	16	15%

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Electronic Resource Collection Trends

Quantity

Overwhelmingly, librarians reported that the quantity of electronic resources in their collection had increased during the past three years; 91% experienced an increase in electronic resources in the library collection. Furthermore, 7% have experienced no change in the quantity of electronic resources while only 1% reported that they are actually collecting fewer electronic resources than they were three years ago.

Driving Forces Behind Implementation of Electronic Resource Collection

Many factors influence resource collection decisions in academic libraries regardless of geography. Librarians were asked to identify which factors had influenced their decisions regarding the collection of electronic resources. Specifically, what factors resulted in libraries collecting more, less or the same quantity of electronic resources during the past three years. It is important to note that the influence of faculty members and students was roughly equivalent on the question of electronic resource collection, with 21% of librarians reporting that their electronic resource collection decisions were influenced by faculty suggestions/preferences and 20% reporting that students suggestions/preferences played a similar role. Interestingly, 23% of those contacted indicated that the electronic resource collection decisions were driven by library objectives/policy.

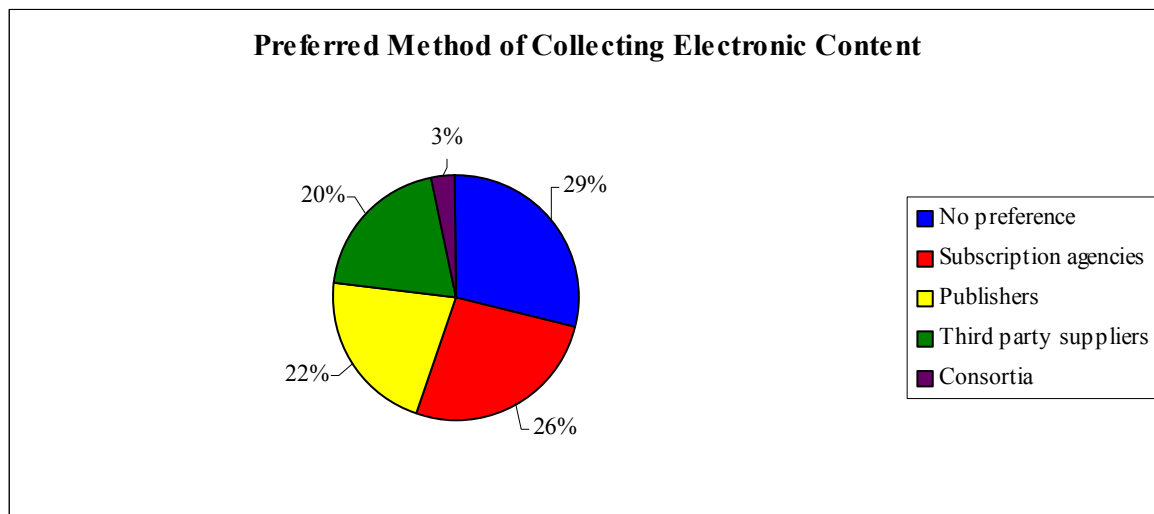
Reason	# of Responses	% of Total Responses
Faculty suggestion/preference	75	21%
Student suggestion/preference	69	20%
Budget considerations	61	17%
Institutional directive	30	9%
Library objective	82	23%
Other	32	9%

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Collection Method Preference

Librarians were also asked about their library's preferred method of collecting electronic journals and content. 175 responses were collected as librarians were instructed to identify all responses that applied.

There is not a standard method of collecting electronic journals and content at libraries surveyed with a slight majority of those surveyed indicating that their institution prefers to obtain electronic resources exclusively through contracts orchestrated by subscription agencies. The majority of respondents indicated that their library does not follow a strict policy for acquiring new electronic resources but instead makes purchasing decisions that are driven by the content instead of the process. In such instances, the library may take a number of factors into consideration when deciding which collection approach makes the most sense for their circumstances.



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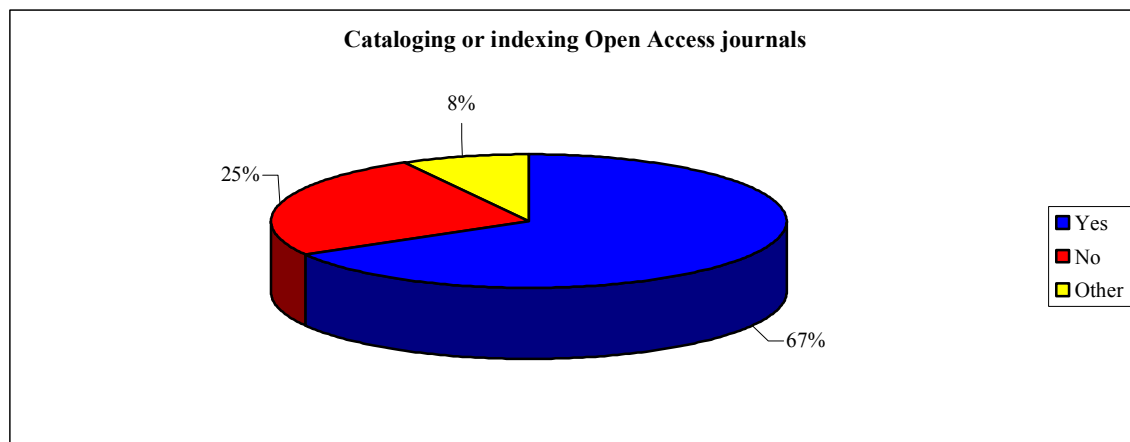
Duplication of Print and Electronic Formats of Content

As Publishers Communication Group, Inc. has observed throughout the year while conducting Non-Renewal Campaigns for numerous publishers, the issue of content duplication continues to be an issue of serious concern for both library staff and publishers alike. 129 of those surveyed (83%) responded to the question that asked if their library has cancelled print subscriptions to journals whose content was already available to the library electronically. An overwhelming 84% indicated that their institution had in fact eliminated print subscriptions in such cases, considering it to be a duplicate subscription to the same content.

Impact of Open Access Journals

Cataloging and Indexing Open Access Journals

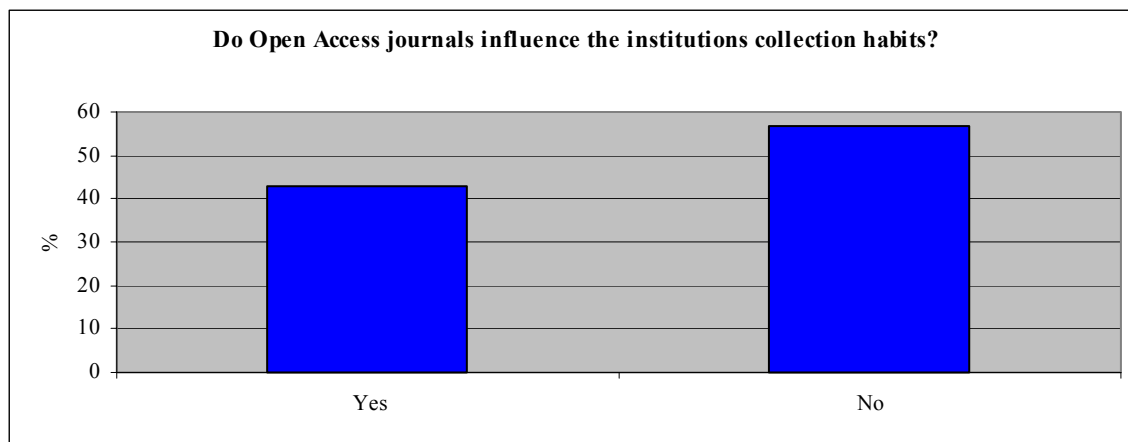
It is perhaps not a surprise that Open Access publications are a hot topic for many librarians contacted. With 132 responses, 67% indicated that their institution catalogs or indexes peer-reviewed Open Access journals on a regular basis. In many cases, Open Access journals are managed just as traditional subscriptions are handled, entered directly into the library catalog. Others explained that they add peer-reviewed Open Access titles to their A-Z list of journals available electronically. 8% of those responding to this question reported that some Open Access publications are cataloged or indexed, but there is not a policy of including all peer-reviewed Open Access publications. Surprisingly, only 25% of those responding to this question indicated that their library did not actively catalog or index Open Access publications for patron use.



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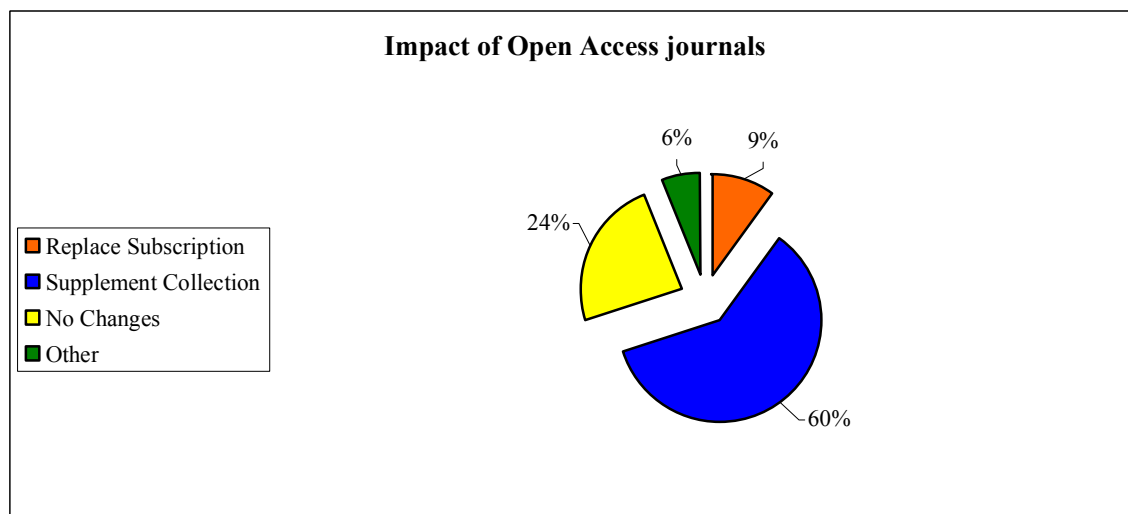
Influence of Open Access Journals on Collection Habits

Librarians were asked if the availability of peer-reviewed Open Access journals influenced the decision process for the acquisition of subscription journals and paid electronic content. It is important to note that 57% of those who responded (104) reported that the availability of Open Access journals did not influence collection habits.



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Although the majority of those responding to questions about Open Access journals reported that they have not had a significant impact on the collection habits of the library, many also indicated that some changes had been made to recognize their availability. Specifically, 9% explained that they have replaced subscriptions to journals with a peer-reviewed Open Access journal of equal quality when available. The majority of respondents (60%) preferred instead to supplement their collection with links to peer-reviewed Open Access journals. 24% explained that their institution has made no changes in light of the availability of Open Access publications while 6% indicated that they have made other changes in response to the availability of Open Access journals.



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The Author

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About Publishers Communication Group, Inc.

PCG was founded in 1989 to help European publishers gain exposure in the North American marketplace. PCG's aim was to direct publishers to the gateway of North American libraries and the goals they could achieve. Our services quickly expanded to include the needs of North American publishers and our focus shifted to the global library community. Our work has become more intricate and involved, allowing PCG to provide comprehensive marketing services that expand and maintain publishers' presence in the world's libraries.

PCG now offers an extensive range of specialized and comprehensive marketing and research services, customized to meet the needs of scholarly and professional publishers. All of our services, tailored to meet specific goals, can be implemented in conjunction with one another or independently.

Our *Market Intelligence Services* are designed to uncover the valuable market information that is not available from other sources because each campaign addresses the unique issues and concerns of your institution.

PCG's *Promotion Services* expand the awareness of your publications or products to a carefully identified and strategically compiled audience, encouraging them to initiate a subscription or expand their current holdings.

Maintaining an office in another country is expensive and difficult to manage. PCG's *Representation Services* offer programs to publishers worldwide that will minimize costs and provide customers easy, direct contact with you. Take advantage of our global presence and ability to provide this valuable service in both North American and Europe.

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