What are your preferences? Print, E or Both?
User Practices and Purchasing Models of E-Books of Hong Kong Academic Libraries

Mr. Bill Tang, E-Resources & Serials Librarian

Lingnan University, Hong Kong
17th May 2010
Overview

- Institutions of Higher Education & Academic Libraries in Hong Kong
- Perspectives of Book Buyers, Students & Academics on E-books
- Changes of Collection Development Policy
- E-Book Purchasing Models
- New Challenges of E-Books Management
University Grants Committee (UGC)

- Established in 1965

- To advise the HKSAR Government on the facilities, development and financial needs of the Universities

- Presently, there are 8 institutions of higher education which are funded by UGC

- Website: [http://www.ugc.edu.hk](http://www.ugc.edu.hk)
8 UGC-Funded Institutions of Higher Education in Hong Kong

- City University of Hong Kong (CityU)
- Hong Kong Baptist University (HKBU)
- Lingnan University (LU)
- The Chinese University of Hong Kong (CUHK)
- The Hong Kong Institute of Education (HKIEd)
- The Hong Kong Polytechnic University (PolyU)
- The Hong Kong University of Science and Technology (HKUST)
- The University of Hong Kong (HKU)
Figures of UGC-Funded Institutions in 2008/09

- Approved Grants for the 8 Institutions = HK$ 10,600 Million
- Student Enrolment (Headcount) = over 72,000
  - Postgraduate Student = over 9,900
  - Non-local Student = over 8,300
- Broad Academic Programme Category:
  - Arts & Humanities = 13.25%
  - Business & Management = 19.31%
  - Education = 9.22%
  - Engineering & Technology = 20.09%
  - Medicine, Dentistry & Health Sciences = 9.04%
  - Sciences = 16.25%
  - Social Sciences = 12.84%
JULAC Libraries

- Joint University Librarians Advisory Committee (JULAC)
- Established in 1967
- To discuss, coordinate, and collaborate on library information resources and services among the libraries of the 8 UGC-Funded Institutions.
- Website: [http://www.julac.org/](http://www.julac.org/)
Figures of JULAC Libraries in 2008/09

- **Collection:** over 10,000,000 volumes
  - Monographs Purchase: over 240,000 volumes
  - E-book: over 3,400,000 volumes
  - E-Journal: over 300,000 titles
  - Online Database: over 2,900

- **Multi-Language:**
  - English, Traditional & Simplified Chinese, French, Japanese, Spanish, German…
WHAT ARE YOUR PREFERENCES?
Benefits of E-Book

- Searchable
- Portable
- Updatable
- Remote Access
- Easy to share
- Save shelving space
- Copy & Paste
- Add multimedia elements
- Hyper-linked
- Going green
What are your preferences?

PERSPECTIVES OF BOOK BUYERS ON BOOKS PURCHASE
Book Purchase Behavior in US

- In 2009, hardcover, paperback and mass market sales are all down, but e-book sales: $313 million, up 176.6%, compound growth rate (2002-09): 71%
  
  (AAP & Gallagher, 2010)

- 30% of print book buyers would wait up to 3 months to buy the e-book edition of a book by their favorite author

  (BISG Survey, 2010)
What are your preferences?

PERSPECTIVES OF STUDENTS & ACADEMICS ON E-BOOKS
User surveys

- University of Denver, 2005 (US)
- National Centre for Science Information, 2006 (India)
- Hong Kong Baptist University Library, 2008 (HK)
- Hong Kong Institute of Education Library, 2008 (HK)
- JISC National E-Books Observatory Project, 2008 & 2009 (UK)
Key Findings & Comments

- E-Books were used by about half of the campus community.
- Respondents indicated that they would use E-books, or use them more, if they only knew about them. (University of Denver, 2005)
- Students tend to use e-books more often than faculty members and staff. Those who did use e-books mostly used reference and technical material. (NCSI, 2006)
Key Findings & Comments (Cont’)

- 81% of users wish the library to subscribe to more e-books.
- Users show supportiveness of making e-books viable over the long term in the academic environment. (HKIEd, 2008)
- Most agree – (e-book) convenient access and multiple user access is an advantage. (HKBU, 2008)
E-books are now part of the academic mainstream: nearly 65% of teaching staff and students have used an e-book to support their study, research or for leisure purposes.

Libraries are therefore a key player in the emerging market for e-books at present.

(JISC National E-Books Observatory Project Report, 2009)
• Librarians will continue to acquire more and more e-books, in packages or individually… (Soules, 2008)
CHANGES OF COLLECTION DEVELOPMENT POLICY
The Change of Library Collection Development Policy

• ...Library should try to purchase or subscribe to any e-data services either online or through any other vehicles after taking consideration of factors such as the demand for the services, the quality and reliability of the services, the financial commitment... (CityU)

• Resources are collected... including e-materials to best meet the needs of our faculty and students. (HKIEd)
The Change of Library Collection Development Policy (Cont’)

- E-texts will be acquired if they are suitable for scholarly use and will either support teaching programs or be relevant to the education and research mission of the University. (LU)

- The e-resources must support the curricular & research needs of the University. (HKU)
Expansion of E-Book Collection

- from 40,000 to 3,400,000 volumes
What they offer really = what we need?

PURCHASING MODELS OFFERED BY E-BOOK VENDORS FOR ACADEMIC LIBRARIES IN HK
What we need?

- Pick & choose (title-by-title) instead of acquiring the entire e-book collection
- Perpetual ownership with option of purchasing annual updates
- Single copy for multiple user access
- Latest publications
- Remote Access
- Accuracy & Completeness
- Archival Right
Collaborative E-Book Acquisitions: ERALL Project

- Electronic Resources Academic Library Link (ERALL) consortium
- A 2-year project
- 8 JULAC libraries
- 6 rounds of purchases
- Acquired over 15,000 titles of English-language E-books
Collaborative E-Book Acquisitions: What to Acquire?

Selection Strategies:

- Copyright
- Subject Relevance
- Language
- Purpose
- Usage
- Ownership
- Currency of Content
- Publisher / Vendor
- Type
- Cost
- Interface
What they offer for HK Academic Libraries?

- One-time purchase
  - Perpetual right
  - Annual access fee
  - Annual update fee
  - Additional discount for acquiring the P/E counterpart

- Subscription
  - Renting the content from publisher within the subscription period. No continue access after the end of subscription
What they offer for HK Academic Libraries? (Cont’)

• Individual Title:
  ◦ Multi user access
  ◦ Multi copies based on demand (e.g. 1 copy for 1 user)
  ◦ Available in one or more than one E-Book Platforms

• E-Book Collection/Package:
  ◦ Multi-disciplinary
  ◦ Specific Subject Area

• Content:
  ◦ Published before 2009
  ◦ For new publications: x month(s) embargo

• Charge per copy / FTE
• Purchase on Demand / Evidence-Based Selection
New Challenges…

- electronic resources differ from print in the way they are acquired, accessed, and licensed.

For:
- Librarians
- Library Users

NEW CHALLENGES OF E-BOOKS MANAGEMENT
New Challenges of E-Books Management

Overlap Analysis
License Negotiation
Access Management
Selection and Evaluation
Document Management
IT Support
Record Management

Individual / Consortium Purchase
Usage
Terms and Conditions
Acquisitions / Subscriptions Model
Perpetual Ownership
Contents Fluctuation
Trial Testing
Timeliness
Records Creation and Update
They really know how to sell e-books...

- Lack of standardization across the industry:
  - Different pricing model:
    - for different size libraries
    - for libraries who subscribe to other products offered by the same vendor
    - for different e-books platforms
    - offered by vendors and publishers
  - Single Copy vs. Multiple Copies
  - Different perceptive on perpetual access
  - Escrow Arrangement
Resources Management Life Cycle

**Acquisition**
- Selection
- Order
- Renewal
- Cancellation
- License Terms [EB]
- Trial Use [EB]

**Provide Access**
- Create MARC Records in the Library Catalogue
- Register [EB]
- IP Address [EB]
- Authentication [EB]
- URL [EB]

**Administration**
- Coverage / Edition Information
- Claiming
- Titles Added or/and Dropped
- Admin Module Information [EB]
- Access Management [EB]

**Collection Development / Management**
- Selection Strategy
- Preservation
- Weeding Exercise

**Budget Management**
- Annual price increase
- Budget reallocation
- Annual access fee [EB]
- Back files acquisition [EB]
- Content update fee [EB]
- Content fee for perpetual ownership [EB]

**Provide Support**
For Librarian [EB]:
- Contact Info. (Technical Support)
- Hardware / Software Requirements
- Error Log / Troubleshoot

For Users [EB]:
- Is the full text available?
- E-Book Platform, Coverage / Edition

**Evaluation**
- Subscription (Renewal / Cancellation)
- Publisher Price / Service Charge
- Usage
- Quality of Services
- Delivery / Claiming
- Purpose of the material
- E-Book Platform [EB]
- Content Accuracy [EB]
- Downtime Analysis [EB]
- Overlap Analysis [EB]
Managing E-Book Collection

A Critical Mission... What can we do?
Afternoon session: 
Taming of the Beast:
Embrace the New Challenges created by E-Book Collection Development and Management!

Thank You!

Email: bill@ln.edu.hk