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Academic Libraries and the Scholarly Book Marketplace: Death by 1,000 (Paper) Cuts?

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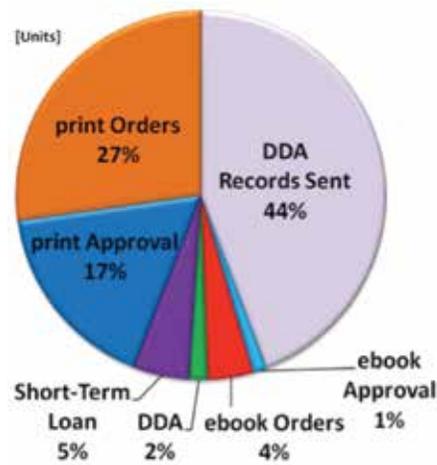
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Academic Libraries and the Scholarly Book Marketplace: Death by 1,000 [Paper]Cuts?

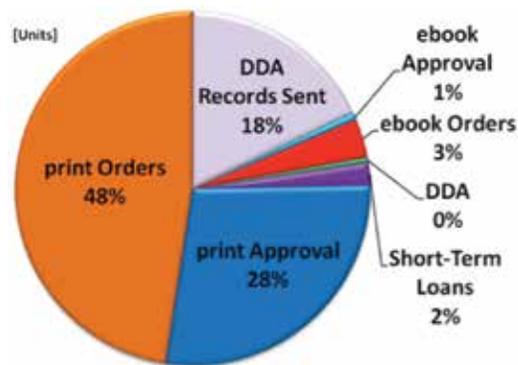
by **Michael Zeoli** (Vice President, Content Development and Partner Relations, YBP Library Services) <mzeoli@ybp.com>

YBP Library Services delivers books to roughly 4,000 academic libraries in 55 countries. **YBP** profiles nearly 70,000 English-language scholarly titles *by hand* every year from about 1,400 publishers, and handles many more through library orders. eBooks, in all their varieties and models, are integrated with print book supply and delivered both as part of library profiles and in collections and packages. Currently, 23 eBook supplier platforms are supported. **YBP** occupies a unique position in the supply of scholarly books to academic libraries, which affords us a broad perspective over rapidly shifting trends.

Over the past four years, **YBP** has distributed \$1,000,000,000 in Demand-Driven Acquisitions (DDA) Records to libraries. To provide a context for this number, the pie chart below shows the distribution (units) of full-text book content to academic libraries for the 12-month period ending in June 2015:



For perspective on how book distribution has changed over the past four years, the chart below shows the results for the same 12-month period four years ago:



There are two important points:

1. Exponentially more book content is being distributed to academic libraries than ever before (DDA Records are not just metadata, but provide immediate access to the full text).

2. The size of the revenue pie has shrunk significantly.

Jane Schmidt, Manager of the Collection Services Team at **Ryerson University**, has written an excellent article defining the value of DDA in conjunction with (and in the face of) other means of making monograph content available. She notes that:

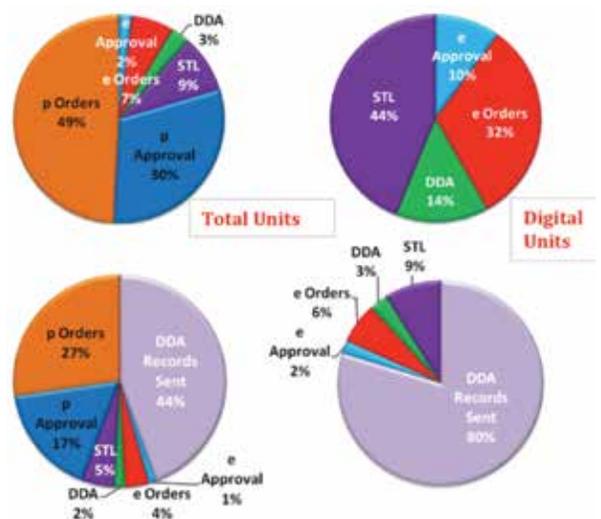
If DDA is a disruptive technology for the collections librarian, it has the potential to be fundamentally altering for publishers [...]¹

While we have taken this quotation out of context (the reference was specifically to publisher packages), it also supports the broader point that new technology and models are “fundamentally altering for publishers” (which include small university presses, the largest commercial publishers, and mostly that sea of publishers that fall in between).

Over the past four years, on average, publishers have seen declines in excess of 20% in unit sales and 10% in revenue. Print sales have diminished by over 25%, while digital has increased by more than 100%. Though print losses far outweigh digital gains, the equation might be seen as sustainable if the pattern were moving ultimately towards a replacement of print revenue with digital, and if library budgets were viewed as stable. The transformation of content distribution, combined with trends in institutional change,

strongly suggest that neither of these are likely. Over the past year, most publishers have seen slowing growth in most *digital* sales categories and, for the first time, declines in some types of digital sales. Looking at the simple four-year growth of digital sales in isolation and without more granularity does not accurately capture the developing trends.

For the 12-month period ending in June 2015, the charts above show that, while print remains the primary category for book acquisitions, the impact of DDA Records is significant. DDA Records have become a primary means of delivering content to libraries for potential discovery, while Short-Term Loan (STL) becomes a primary means by which that content is accessed.



Academic libraries do not as a rule duplicate titles, so the sheer magnitude of DDA Records (immediate full-text access) being delivered to libraries cannot help but have played a significant role in eroding publisher sales.² The average conversion rate of DDA Records into purchases has been extremely low, as anyone following DDA/STL studies and discussions is aware. Some publishers have begun to refer to DDA Records as “free books,” owing to the very low “trigger” or purchase rates. DDA “Records” provide access to the entire text and are not a simple MARC record as the name might suggest. *Digital pricing and sales models continue to be based on old print models, which are no longer adequate to the changing collection paradigms for monographs.* Benefits accruing to one part of the ecosystem are not sustainable to others under current business models.

It is only since 2011-2012 that DDA/STL have gained a significant foothold in the broad academic library landscape and so begun to demonstrate effects across the spectrum of monograph collecting and use. Most studies are either too old to be very useful, or they rely on studies and data that are simply too old. It is what has happened since 2011-2012, and particularly over the past two years, that has caused high anxiety among publishers and is causing many to reconsider the models in which they had agreed to participate. This will have consequences for library content access and acquisition.

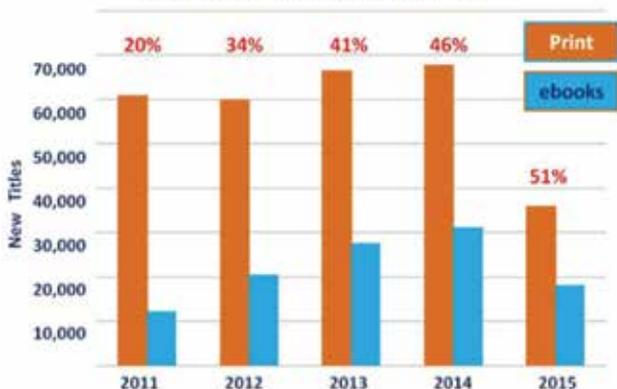
While most publishers are still doing what they’ve always done, libraries are changing rapidly. Ironically, some of the biggest advocates of DDA still spend 60% or more of their monograph budget on print books, while some

continued on page 16

of the largest research libraries are pushing monograph acquisitions to the extreme margins in favor of DDA Records and publisher collections.

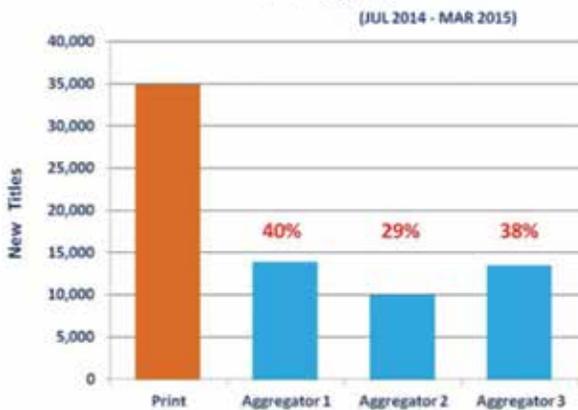
To what degree does digital content availability shape library collection management? About 50% of English-language scholarly books (YBP's universe) are available simultaneously in print and digital formats (so conversely, half the universe is *unavailable* in digital format); however, it is a mistake to assume that 50% is then available through a preferred source in a preferred format or means of access.

Simultaneous ebook Availability



Some of the digital content is only available in publisher collections. No eBook aggregator can meet the 50% availability level. Multiple aggregator-publisher relationships are required to increase digital content accessibility, as the chart below shows.

eBook Availability by Aggregator



Publishers vary widely in their relationships with aggregators. Not only may they choose to work with just one or two aggregators, but they are increasingly selective about the particular license models in which they will participate.

Simultaneous Print – ebook Availability

	% e Availability		
	Aggregator 1	Aggregator 2	Aggregator 3
Press 1	69%	75%	69%
Press 2	50%		
Press 3			
Press 4	88%		84%

How does a library remain apprised of this information? Is it changing so rapidly as to require a *system* rather than *specific information*?² It is a puzzle that draws us in and becomes complex quickly. Can we address this challenge? But do we agree that it is a challenge? One very important issue is that parochial perspectives are shifting within their own orbits. How is institutional pressure influencing these decisions? How do use patterns and demand affect “collection” strategy or is collecting a valid goal in a digitally networked age?

Considering the impact of new technology to the library “canon interrupted” (to borrow from **Jane Schmidt**), what is the role and function of an academic library within an institution? Within a consortium? Within a broader community? In a recent article in *Inside Higher Ed*, **Dane Ward**, Dean of Libraries at Illinois State University, writes:

It will take a *university community* to shape a future library that meets the specific needs of learning and research at that institution. This transition is not just about libraries. It is about how colleges and universities come together to solve a collective challenge. Libraries cannot puzzle out their future alone.⁴

Carl Straumsheim wrote a very interesting article based on interviews with a number of deans who have had direct experience with the changing missions of academic libraries. **Patricia Tully**, formerly the Dean of Libraries at **Wesleyan University** is quoted:

It becomes more of a necessity [for a library] to have people who are experts

and who pay attention to how that environment is changing. There will be some institutions that decide that they don't need libraries or librarians. The IT department is going to take those [functions, but] they're going to be hiring people who have library expertise [and] backgrounds to do those things... It's a matter of breaking free of the library being some irrelevant, old-fashioned thing that used to be important but isn't anymore.⁵

How are new technologies and publishing models affecting institutional dynamics? As the trend of consolidation continues among publishers, among vendors and aggregators, and even among libraries (consortial sharing of resources from technical services to content), how will relationships be both redefined and reshaped?

While Demand-Driven Acquisitions and Short-Term Loan are having a significant impact currently, they ultimately play ‘bit parts’ on a grander stage. The organizations that manage these tools will continue to evolve in ways that challenge us. As publishers respond to changes in library behavior in regard to monographs, libraries and the institutions of which they are part will continue to change their approaches. Ours is a living, breathing ecosystem, not static, not linear, and certainly not stable for the foreseeable future. It will be, as it always has been, a process rather than an arrival. 🐉

Endnotes

1. Demand-Driven Acquisitions: The Hegemony of the Canon Interrupted, <http://www.ala.org/acrl/sites/ala.org/acrl/files/content/conferences/confsandpreconfs/2015/Schmidt.pdf>.
2. To be clear, there are multiple causes for publisher sales decline, but abundant studies and presentations, some here in *Against the Grain*, have confirmed “big savings” earned from DDA and STL.
3. Wasn't this already an issue long before eBooks came along? It has long been virtually impossible for a library to adequately manage the sea of new content being published. Book profiling was just one system developed to assist libraries in identifying new content — and like everything else, it is continuing to develop apace with the explosive effects of technology and new factors in library decision-making processes (why some view it as a static artifact is surprising at just the time when more tools are needed).
4. **Dane Ward**, *Inside Higher Ed*, April 21, 2015.
5. **Carl Straumsheim**, “Clash in the Stacks.” *Inside Higher Ed*, 12/14.