ALPSP Research Report

ALPSP survey of librarians
Responding to the credit crunch:
What now for librarians and libraries?

Ian Russell
ALPSP
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1. Executive Summary

1.1. The Survey

Against the backdrop of the global economic downturn that began in the second half of 2008, and the impact that this had on public finances and on the volatility of the world’s major currencies, ALPSP undertook a survey of librarians to inform a panel discussion at the 2009 ALPSP International Conference.

The survey was designed by Richard Gedye (Research Director, Oxford University Press and Chair of the conference panel session) and Ian Russell (Chief Executive, ALPSP) with input and advice from the four librarians involved in the conference panel session: Rick Anderson (University of Utah), Colin Storey (Chinese University of Hong Kong), Jill Taylor-Roe (Newcastle University), and Nol Verhagen (Amsterdam University).

The questions focussed on six topics:

- Information on the numbers of journals made available, how these have changed historically and expectations for 2010
- Discounted packages of journals (so called 'big deals'), their popularity, number of journals purchased in this way and factors influencing purchasing decisions
- Single journal subscriptions and the factors influencing purchasing decisions
- Awareness and popularity of Open Access memberships, and influences regarding decisions to participate in them
- Drivers for, and barriers to, moving to electronic only provision for access to journal content
- Opinions on journal publishing and journal publishers

1.2. Summary of Findings

General

- The average number of journals available via libraries more than doubled between 2000 and 2009. This is widely attributed to the success of discounted journal packages (so called 'big deals').
- As a whole, librarians expect to provide access to around the same number of journals in 2010 as they did in 2009, but those based in the United States of America appear less optimistic than those in Europe. The situation also varies greatly from institution to institution with some expecting decreases of as much as 20% in the number of journals that they provide unembargoed access to.
- The survey data from those who purchase 'big deals' suggest that the proportion of journals purchased as part of a 'big deal' will increase in 2010 from 87.1% to 87.8% with a corresponding decrease in the number of journals purchased as single subscriptions.
- Usage data (overall usage and cost per use) are extremely important when deciding whether to renew or cancel journals content either as a 'big deal' or as a single subscription.
- The profit status of the publisher is consistently the least most important influencing factor when librarians are making purchasing decisions.
**Big deals**

- 78% of respondents reported that they purchase at least some of their journals through 'big deals'.
- The popularity of 'big deals' is increasing with the average number per institution increasing from 2 in 2000 to 11 in 2009.
- 91% of librarians purchasing a 'big deal' do so as part of a consortium.
- Around 96% of 'big deals' are renewed or upgraded but the percentage cancelled or downgraded is increasing, possibly a sign that the market for 'big deals' has matured.
- The financial reality of cost per article is the most important factor influencing librarians when they decide to renew or purchase a new 'big deal' with usage data being very important when it is available (i.e. when making decisions to renew or cancel). The influence of faculty is relatively unimportant when making purchasing decisions regarding 'big deals'.

**Subscriptions to single journals**

- The survey data suggests that librarians are expecting the number of journals purchased via a single subscription to decrease by 5.8% from 2009 to 2010.
- Librarians are expecting the number of single subscriptions cancelled as a percentage of the total number of single subscriptions to increase from 2.3% in 2009 to 5.5% in 2010.
- The influence of faculty is very important with respect to purchasing decisions for single subscriptions, much more so than is the case for 'big deals'. Usage data is also very important when it is available (i.e. when making decisions to renew or cancel subscriptions).

**Open access memberships**

- Awareness of open access memberships among librarians is very good with 95% of respondents knowing what an open access membership is.
- More than a third of respondents indicated that their organization has at least one active open access membership.
- The cost / benefit is, unsurprisingly, the most important factor taken into consideration by librarians when making decisions regarding open access memberships with the desire to support the open access business model featuring as the second most important factor when deciding to take a new open access membership or to renew an existing one.

**Moving to electronic only**

- There is a strong desire among librarians to move away from print-on-paper journals. 90% of librarians responding either strongly agreed or agreed that they would like to move more journal titles to electronic only with only 2% disagreeing.
- The main reasons for librarians wishing to move to electronic only access provision for journals are the low usage of the print version of journal, to take advantage of any saving on subscription price and to save shelving space.
- The main reason cited by librarians for not moving more journals to electronic only is that it is not offered by the publisher, with concerns over perpetual access (post cancellation access) a close second.
1.3. Conclusions

- The average number of journals being made available by the libraries surveyed more than doubled between 2000 and 2009. However, librarians are predicting that they will provide access to around the same number of journals in 2010 as they did in 2009, with more journals purchased as part of 'big deals' and fewer as single subscriptions. This will be of concern to smaller publishers who are unable to offer their content as part of a 'big deal' and those that are launching new subscription journals.

- A significant proportion of librarians responding to the survey state that they would prefer to purchase content from non-profit publishers, although the profit status of the publisher is not an important factor in any of the purchasing decisions surveyed.

- There is a strong demand from library customers to move more journals to electronic only. Three of the four most important barriers are within the control of publishers who may wish to consider what more can be done regarding electronic only offerings, licensing terms and post cancellation access to facilitate this move.

- Librarians generally understand and value the role that academic publishers play in the dissemination and communication of scholarship. However, there is room for a better understanding of the inflationary pressures on journal prices and better communication regarding this from the scholarly publishing industry generally.

- Librarians look for the most advantageous cost / benefit ratio when making their purchasing decisions. Usage statistics, both overall use and cost per use, are very important tools used in determining whether to renew or cancel journal content. Publishers should therefore continue to make every effort to maximize the usage of their version of the article. Faculty continue to play a very important role in all purchasing decisions relating to single subscriptions and end user marketing will therefore remain a priority for journal publishers who primarily sell their content as single subscriptions.

- Librarians responding to the survey are knowledgeable of open access publishing business models. However, more work needs to be done to minimise the burden of administrating open access publishing and to ensure that expenditure is predictable.
2. Survey methodology and respondent profile

2.1. The survey methodology

The survey comprised 32 questions made up of a mixture of qualitative and quantitative questions, sometimes with multiple parts. Nine of the questions asked for numerical responses, seven for text responses and 16 were in the form of multiple choice questions. In multiple choice questions, the possible responses were listed in alphabetical order.

The online survey tool Survey Monkey [1] was used to design the survey and to collect responses. A link to the online survey was sent to a number of e-mail discussion lists used by librarians including Liblicence-L, hosted by Yale University Library; Lis-e-resources, operated by UKSG; and SERIALST, hosted by the University of Vermont. Announcements asking for responses were sent on 29 June 2009 with reminders sent on 29 July 2009. Requests were made to forward the announcement to other discussion lists and while announcements were included on other online librarian resources (for example the Library Intelligencer blog at the University of Melbourne, Australia) the exact extent to which this happened is unknown. The survey was open for responses from 29 June 2009 to 10 August 2009.

A total of 173 responses were received. The survey contained several questions asking for detailed historical information and, while this information is very useful, the survey designers understood that not all respondents would be able to provide this data. Most questions were therefore made optional although respondents were encouraged to provide as much information as possible. As a result response rates for individual questions varied from 47 (27.1%) to 100 (57.8%) for optional questions.

Questions surveying influences on purchasing decisions asked respondents to rank the three most important things having a bearing on their choices. Their first choice was given three times the weight of their third choice, and their second choice given twice the weight of their third choice (in other words three ‘votes’ were attributed to their first choice, second choice two ‘votes’ and third choice one ‘vote’). Cost and lack of budget were not listed as possible answers to encourage respondents to explain the underlying rationale behind their choices when making difficult purchasing decisions.

2.2. Profile of respondents

2.2.1. Location of respondents

Responses were received from librarians based in 14 countries. Of these, the countries with the greatest number of respondents were the USA, accounting for 57.7%, the UK with 16.7%, China (including Hong Kong) with 5.1% and the Netherlands which accounted for 3.8% of responses.

The countries represented can be categorized into regions as follows:
### Region | Countries represented | Proportion of responses from this region
---|---|---
North America | United States of America; Canada | 62%
South America | Brazil | 1%
Europe | United Kingdom; Netherlands; France; Germany; Italy; Ireland; Sweden; Switzerland | 28%
Asia | China (including Hong Kong) | 5%
Indian subcontinent | India | 3%
Australasia | Australia | 1%

Table 2.1 – Geographical distribution of respondents

The geographical distribution of respondents is also shown in figure 2.1 below.

![Geographical spread of respondents by region](image)

**Figure 2.1 – Geographical spread of respondents by region**

### 2.2.2. Type of organization

Respondents were asked to identify the type of organization that their library served and were able to select all that apply (table 2.2).

<table>
<thead>
<tr>
<th>Type of organization</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic / University</td>
<td>81.8%</td>
<td>63</td>
</tr>
<tr>
<td>Hospital</td>
<td>14.3%</td>
<td>11</td>
</tr>
<tr>
<td>Government</td>
<td>7.8%</td>
<td>6</td>
</tr>
<tr>
<td>Corporate</td>
<td>1.3%</td>
<td>1</td>
</tr>
<tr>
<td>Public Library</td>
<td>3.9%</td>
<td>3</td>
</tr>
</tbody>
</table>

Table 2.2 – Percentage of responding organizations by type

As can be seen, more than four-fifths of those responding to this question were from academic / university libraries.
2.2.3. **Size of organization**

Respondents from universities were asked to give an indication of the size of their organization by supplying their Carnegie Classification [2] (if based in the USA), their JISC band [3] (if in the UK) or the number of Full-Time Equivalent (FTE) students (for all other countries).

Those not at a university were asked to supply the number of FTE employees at their organization.

These responses were used to classify institutions as either ‘small’, ‘medium’ or ‘large’.

We realized after the survey was issued that it would have been better to have asked respondents to classify the size of their institution themselves and to have provided some guidance at that point as to what constituted ‘small’, ‘medium’ and ‘large’ in the context of the survey. Instead, we had to interpret the responses given. We characterised the size of institutions based on the criteria in table 2.3.

<table>
<thead>
<tr>
<th>Size</th>
<th>FTE students / FTE employees</th>
<th>JISC band</th>
<th>Carnegie Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large</td>
<td>&gt;10,000</td>
<td>A, B</td>
<td>e.g. Research intensive tiers</td>
</tr>
<tr>
<td>Medium</td>
<td>5,000-10,000</td>
<td>C, D, E</td>
<td>e.g. 4 yr colleges, masters colleges</td>
</tr>
<tr>
<td>Small</td>
<td>&lt;5,000</td>
<td>F, G, H, I, J</td>
<td>e.g. Special focus institutions</td>
</tr>
</tbody>
</table>

Table 2.3 – Criteria used to classify size of institution

The results are displayed in figure 2.2 below.

![Figure 2.2 – Size of institution](image)

Whilst classifying institutions in this way was an imperfect exercise, it does appear that there was a healthy spread in the size of organizations responding to the survey.
3. Survey Analysis

3.1. Number of journals available

Questions 1 to 3 asked librarians about the number of journals that their library provided unembargoed access to (with ‘unembargoed access’ defined as access to the latest issues available at the time in either electronic or print format). This definition was used to avoid counting journals available as part of aggregated services that give delayed access to journal articles. However it was clear from some of the comments received that respondents found it difficult to disentangle those journals supplied via aggregators with and without embargoes.

The survey asked for the number of journals available in 2000, 2007, 2008 and 2009 to provide some historical background information and for respondents to state the number of journals they expected to provide in 2010. The results are shown in table 3.1.

<table>
<thead>
<tr>
<th>Year</th>
<th>Mean Response</th>
<th>Lower Bound</th>
<th>Upper Bound</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>6,166</td>
<td>20</td>
<td>30,000</td>
<td>27</td>
</tr>
<tr>
<td>2007</td>
<td>10,737</td>
<td>15</td>
<td>52,000</td>
<td>39</td>
</tr>
<tr>
<td>2008</td>
<td>11,031</td>
<td>9</td>
<td>55,000</td>
<td>44</td>
</tr>
<tr>
<td>2009</td>
<td>13,033</td>
<td>3</td>
<td>67,889</td>
<td>54</td>
</tr>
<tr>
<td>2010 (estimated)</td>
<td>13,175</td>
<td>6</td>
<td>61,000</td>
<td>54</td>
</tr>
</tbody>
</table>

Table 3.1 – Average number of journals available in 2000, 2007, 2008, 2009 and 2010 (all responses)

3.1.1. Change in number of journals available from 2000 to 2009

Using all data supplied the average (mean) number of journals made available increased each year recorded and by a factor of 2.1 (an increase of 111%) between 2000 and 2009 from 6,166 to 13,033.

However it may be more representative to examine only those responses where data was supplied for all of the years in question (i.e. where a respondent provided data for the years 2000, 2007, 2008 and 2009). For this set of data the mean number of journals increased from 6,610 in 2000 to 14,091 in 2009; a factor of 2.13 or a 113% increase. These data are plotted in figure 3.1.

Several respondents credited discounted packages (especially the large packages known as ‘big deals’) for the increases in the number of journals that they are able to purchase and this is covered in more detail in section 3.2.
3.1.2. Change in number of journals available from 2009 to 2010

As noted above, we asked respondents to estimate how many journals their library would be providing unembargoed access to in 2010.

Using all responses supplied, the average number of journals increases marginally from 13,033 in 2009 to 13,175 in 2010.

However, once again it may be more representative to only examine data from respondents who gave data for both 2009 and 2010. Using this subset, the average number of journals falls slightly from 13,574 in 2009 to 13,479 in 2010.

Since both these changes are slight, we can perhaps say that overall librarians expect to provide access to around the same number of journals in 2010 as they did in 2009. However, it is clear from the survey evidence that the situation will vary from institution to institution with some predicting declines in the numbers of journals they purchase of 20% or more.

50 respondents provided data on the numbers of journals available in 2009 and the number they estimate will be available in 2010. Of these 17 are predicting that they will be providing access to fewer journals in 2010, 20 that they will be providing access to the same number and 13 that they will actually be providing access to more journals in 2010 than they did in 2009.

Looking at the predictions by country, of organizations in the United States almost half (48%) predicted a decrease in the number of journals available in 2010 as
opposed to 2009, 36% predicted that they will have equal numbers of journal titles and just 16% of organizations think that they will be able to purchase more journals in 2010 than they did in 2009. European librarians on the other hand appear more optimistic with three respondents (25%) projecting fewer journals, five (42%) predicting the same number and four (33%) estimating that they will increase the number of journals that they are providing access to. Looking at the UK as a subset of this only one UK respondent predicted lower numbers of journals with two predicting the same number as 2009 and two more projecting an increase.

Several respondents noted that it was difficult to estimate the actual number of journals that they would provide access to in 2010 as both their budgets and some journal prices were not available when the survey was completed.

3.2. 'Big deals’ and other discounted journal packages

Questions 4 to 13 asked about so called 'big deals’ – large, discounted packages of journals which now play a major part in the journal purchasing landscape. They have proved extremely popular and there seems little doubt that they have played a major part in enabling the dramatic increases in the availability of journals reported in section 3.1.

However, if the comments received in our survey are anything to go by then librarians have diametrically opposed views towards 'big deals’. Positive comments included:

"Big Deals have transformed the landscape. We have moved from 5155 unique journal titles in 1998 to 32,166 in 2009... the big deal has enabled the reinstatement of many important and used titles that had to be cancelled”

"...an essential part of our e-journals collection”

"[regarding one particular package] very good value and appropriate for our needs”

"We are true believers in them”

On the other hand, there were a number of negative comments including:

"I wish we didn't [subscribe to 'big deals']”

"[we take 'big deals'] with great reluctance”

"Absolutely hate the constraints they come with”

"Costs are much too high for this library and terms and conditions unattractive”

3.2.1. Proportion of libraries purchasing journals as part of 'big deals'

78% of respondents stated that they purchase 'big deals' or other discounted journal packages with this figure rising to 88% for North American respondents and 89% for mainland Europe (i.e. Europe excluding UK).
Just 9% of libraries purchase their ‘big deals’ / packages as a single institution, 26% as part of a consortium and 65% both as a single institution and as part of a consortium. 91% of respondents therefore purchase some of their ‘big deals’ as part of a consortium.

3.2.2. Proportion of journals purchased as part of a ‘big deal’

The survey data from those who purchase ‘big deals’ suggest that the number of journals purchased as part of a ‘big deal’ will increase slightly in 2010 in both absolute and percentage terms, the latter from 87.1% to 87.8% with a corresponding decrease in the number of journals purchased as single subscriptions. These data are shown in table 3.2.

<table>
<thead>
<tr>
<th>Journals purchased as part of a ‘Big Deal’</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total journals</td>
<td>13238</td>
<td>13178</td>
</tr>
<tr>
<td>Journals in ‘Big Deals’</td>
<td>11531</td>
<td>11565</td>
</tr>
<tr>
<td>Percentage of journals in ‘Big Deals’</td>
<td>87.1%</td>
<td>87.8%</td>
</tr>
<tr>
<td>Single subscriptions</td>
<td>1707</td>
<td>1613</td>
</tr>
<tr>
<td>Percentage of journals in single subscriptions</td>
<td>12.9%</td>
<td>12.2%</td>
</tr>
</tbody>
</table>

Table 3.2 - Number of journals purchased as part of a ‘Big deal’

3.2.3. Popularity of ‘big deals’

The survey data shows a growth in popularity of ‘big deals’ with the average number per institution increasing from 2 in 2000 to 11 in 2009 (figure 3.2).
3.2.4. **Renewals, cancellations, upgrades and downgrades of 'big deals’**

Questions 6 to 10 probed how 'big deal' purchasing had changed over the years and in particular the total number of 'big deals' taken, the number cancelled from the previous year, the number of new or renewed 'big deals', the number upgraded to a larger, more expensive package from the same publisher and finally the number downgraded to a smaller, less expensive package from the same publisher.

The responses are shown below in table 3.3 and graphically in figure 3.3.

<table>
<thead>
<tr>
<th>Year</th>
<th>2000</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of 'big deals'</td>
<td>47</td>
<td>310</td>
<td>397</td>
<td>614</td>
</tr>
<tr>
<td>Number of 'big deals' cancelled from the previous year</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>14</td>
</tr>
<tr>
<td>Number of new and renewed 'big deals'</td>
<td>44</td>
<td>276</td>
<td>375</td>
<td>591</td>
</tr>
<tr>
<td>Number of 'big deals' renewed with a larger group of titles</td>
<td>3</td>
<td>32</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Number of 'big deals' renewed with a smaller group of titles</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>9</td>
</tr>
</tbody>
</table>

Table 3.3 – 'Big deals': total, cancelled, new and renewed, upgraded and downgraded

![Figure 3.3 - 'Big deals': total, cancelled, new and renewed, upgraded and downgraded](image-url)
The total number of ‘big deals’ has grown dramatically since 2000. Unsurprisingly, ‘big deal’ purchases are unlikely to be cancelled; in recent years 96% of ‘big deals’ are new, renewed at the same level or upgraded and cancellation rates have been of the order of 2% with the remainder being downgraded to smaller packages. However, the percentage of ‘big deals’ being cancelled does appear to have been increasing slightly each year since 2007.

Also, and possibly a sign that the market for ‘big deals’ has reached maturity, the percentage of ‘big deals’ being upgraded has fallen from over 10% of the total in 2007 to less than 3% in 2009 while the percentage of those being downgraded has correspondingly increased from 0.7% in 2007 to 1.5% in 2009.

3.2.5. Influences regarding ‘big deals’

The survey also asked the respondents to indicate the factors that influenced their purchasing decisions with respect to ‘big deals’.

Figure 3.4 shows the popularity of factors rated when purchasing a new ‘big deal’.

Librarians responding to the survey indicated that the financial reality of cost per article is the most important determining factor when purchasing a ‘big deal’. This is followed by consideration of the quality of content and then the quantity of content. The influence of faculty is ranked a fairly distant fourth with other issues like licensing terms and the volume of pay-per-view purchases playing only a minimal part in the decision.
The popularity of factors rated when renewing a 'big deal' is shown in figure 3.5.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brings better cost per article for the content which our users need</td>
<td>95</td>
</tr>
<tr>
<td>than any alternative</td>
<td></td>
</tr>
<tr>
<td>Overall usage</td>
<td>93</td>
</tr>
<tr>
<td>Content (quality)</td>
<td>90</td>
</tr>
<tr>
<td>Cost per use</td>
<td>85</td>
</tr>
<tr>
<td>Content (large number of titles in deal)</td>
<td>80</td>
</tr>
<tr>
<td>Licensing terms (i.e. what you are allowed to do with the licensed</td>
<td>75</td>
</tr>
<tr>
<td>content)</td>
<td></td>
</tr>
<tr>
<td>Business model (i.e. how you pay for content)</td>
<td>70</td>
</tr>
<tr>
<td>Lack of availability from aggregator site</td>
<td>65</td>
</tr>
<tr>
<td>Volume of lending to others via Inter-Library Loan</td>
<td>60</td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or non-profit)</td>
<td>55</td>
</tr>
</tbody>
</table>

As can be seen financial realities are again the most important factor with the cost per article being better than any alternative having the most impact on the decision. Of course, librarians are able to use usage data to support decisions to renew or cancel 'big deals' [4,5,6] and overall usage is ranked as the second most important factor with cost per use fourth. Quality of content again figures strongly being cited as the third most important factor with the influence of faculty being fairly unimportant.
Figure 3.6 shows the popularity of factors rated when cancelling a 'big deal'.

Usage data and cost effectiveness of other purchasing routes dominate the factors determining the cancellation of 'big deals' with all other factors – again including the influence of faculty but this time also including the quality of the content – seen to be relatively unimportant.

3.3. Subscriptions to individual (single) journals

Questions 14 to 18 surveyed librarians about single subscription purchases, i.e. those journals purchased on their own and not as part of a discounted package or aggregation.

3.3.1. Number of single subscriptions which are new, renewed and cancelled

The data in table 3.2 suggests that respondents expect the economic situation to have more of an impact on their purchases of single subscriptions than their 'big deal' purchases and this was emphasised in a number of comments:

"We have been asked to cut 15% of our materials budget for 2010. We expect much of this to come from single journal subscriptions"

"We have cancelled single journal subscriptions to help meet budget reduction targets"

Indeed this is reflected in the responses to questions about the number of single subscriptions purchased for the first time, renewed, and cancelled in 2009, and the
respondents’ expectations for 2010. The average numbers of new single journal subscriptions, those renewed and those cancelled are show in the bar chart in figure 3.7.

![Bar chart showing single subscriptions new, renewed and cancelled in 2009 and 2010](image)

Figure 3.7 – Single subscriptions new, renewed and cancelled in 2009 and 2010

The survey data suggests that the average number of single journal subscriptions will decrease by 5.8% from 2009 to 2010 whilst the number of single subscriptions cancelled as a percentage of the total number of single subscriptions will increase from 2.3% to 5.5%.

3.3.2. **Influences regarding single journal subscriptions**

Again respondents were asked to indicate their influences when making purchasing decisions, this time in relation to single subscriptions. It is clear that the influence of faculty is much more important with respect to purchasing decisions on single subscriptions than is the case for ‘big deals’.
Figure 3.8 shows the popularity of factors rated when purchasing a new single subscription.

The influence of faculty is the most important determining factor here with the quality and prestige of the journal also figuring strongly. This is in contrast to influences reported for 'big deals' where the quality of the journal content was deemed more important than faculty.
Figure 3.9 shows the popularity of factors rated when renewing a single subscription.

The survey confirms that usage and cost per use are both important factors when considering the decision to renew a single subscription. Cost per use is ranked as being more important than quality of content, whereas it was deemed less important in relation to 'big deals'. Again the influence of faculty features much more strongly than is the case for 'big deals'.
Figure 3.10 shows the popularity of factors rated when cancelling a single subscription.

Again overall usage and cost per use are the dominant factors and the influence of faculty plays a stronger role in the decision to cancel a single subscription than is the case when considering cancellations of ‘big deals’.

The importance of the overall cost of a single subscription was also mentioned in a number of comments:

“It is not just ‘cost per use’, it is increasingly overall cost. There are ‘break points’ and they are relative; if a journal is published by a non-profit and had been relatively inexpensive, a big jump in a single year is one I may try to sustain, but some higher priced journals are going to get cancelled simply based on TOTAL cost”

“The main reason for cancelling a title is that academics wish to obtain a new title and there is no additional money. The second most common reason is a shift in research emphasis which leads departments to re-focus their portfolio of journals”

Two comments noted that journals increasing in price by more than 10% would come under close scrutiny:

“Everything over $400 is going to come under review. Everything that increases more than 10% is going to come under review“
“Overall cost is a key driver - we have an automatic alert to review any titles which go up more than 10% in price - then we factor in usage etc.”

3.4. Open access memberships and journals
In questions 19 to 22 we wanted to gain an insight into the extent to which open access memberships have become established in the library community. In open access membership programs like 'PLoS Institutional Membership', the 'BioMed Central Membership Program' and the 'Hindawi Institutional Membership Program', organizations pay an annual fee and the article processing charges associated with open access publishing for authors from that institution are discounted or waived.

3.4.1. Awareness of open access memberships
Awareness of open access memberships was good with only 5% of respondents not knowing what an open access membership is.

3.4.2. Take-up of open access memberships
An impressive 36% of respondents have at least one open access membership with the remaining 64% not having any open access memberships. These data are displayed as a pie chart in figure 3.11 below.

Open access publishers will be encouraged that more than a third of the librarians surveyed stated that they had at least one open access membership, but such schemes are not universally welcomed by librarians:

“I don't understand the whole 'open access membership' idea. Why on earth would any library pay for free content? We refuse”

While others pointed to administrative problems:

“I have explored a membership… but administration is opposed”
"The internal financial mechanisms would make it cumbersome to administer in our context”

3.4.3. Influences regarding open access memberships

Figures 3.12, 3.13 and 3.14 show the importance of factors influencing librarians when purchasing a new open access membership, when renewing an open access membership and when cancelling an open access membership respectively.

![Graph showing factors influencing decision to purchase a new open access membership.](Image)

- Cost / benefit (i.e. membership less than would pay in article charges)
- Desire to support Open Access business model
- Quality of title
- Faculty
- Structure of membership scheme
- Reputation / prestige of publisher
- Profit status of publisher (e.g. commercial or non-profit)

Figure 3.12 – Factors influencing decision to purchase a new open access membership
ALPSP survey of librarians 25
Responding to the credit crunch: What now for librarians and libraries?

Cost / benefit (i.e. membership less than would pay in article charges)
Desire to support Open Access business model
Faculty
Quality of title
Structure of membership scheme
Reputation / prestige of publisher
Profit status of publisher (e.g. commercial or non-profit)

Figure 3.13 – Factors influencing decision to renew an open access membership

Cost / benefit (i.e. membership more than would pay in article charges)
Structure of membership scheme
Faculty
Quality of title
Reputation / prestige of publisher
Profit status of publisher (e.g. commercial or non-profit)
Waning support for open access business model

Figure 3.14 – Factors influencing decision to cancel an open access membership
Weighing the cost of an open access membership against the financial benefits in terms of discounted or waived article processing charges is, unsurprisingly, the most important factor taken into consideration by librarians when making decisions regarding open access membership. Interestingly the desire to support the open access business model features as the second most important factor when deciding to take a new open access membership or to renew an existing one with faculty and quality of the title ranked third or fourth in each case.

When cancelling an open access membership, the cost / benefit relationship is again the most important issue followed by the structure of the membership scheme. One comment explained the concerns:

"[we] find the open ended nature of the costs a worry... [our annual budget for article processing fees for one publisher] was spent up in 6 months this year, so our membership was suspended from March as we had no extra money to put into the account. Academics find this situation confusing and frustrating”

This comment implies, of course, that the open access publishing route has been more popular than expected. Nonetheless, it seems that open access publishers need to continue to work with librarians and administrators to ensure that open access memberships are an effective way of minimizing the administrative burden of pay-to-publish models and of making expenditure predictable in order to assist research establishments in planning their budgets.

Once again faculty and the quality of the title are the third and fourth most important reasons with waning support for the open access business model the least important factor confirming that support for the open access business model is strong among some librarians.

3.5. Moving to electronic only

The move to electronic only provision of journal content has been discussed for some time [7,8] but is both topical and of high importance given that recent studies of the economics of scholarly publishing [9,10] have identified that such a move would result in substantial systems savings, primarily to libraries.

We were therefore interested in questions 23 to 25 to examine the librarian perspective regarding a continued move towards electronic only journals.

3.5.1. Desire to move more journal titles to electronic only

Respondents were asked to rate how strongly they agreed with the statement “I would like to move more journal titles to electronic only”. The results are shown as a pie chart in figure 3.15. 90% of librarians responding to this question either strongly agreed or agreed that they would like to move more journal titles to electronic only and only 2% disagreed with the statement.
3.5.2. Motivation for moving more journal titles to electronic only

We then asked about the motivation for this desire to move more journal titles to electronic only and the results of this are shown in figure 3.16. As can be seen the primary reasons are the low usage of print followed by a saving on the subscription price and on shelving space.

Interestingly, savings on checking journals in and out and on re-shelving were felt to be less important despite studies suggesting that there would be considerable system savings attributed to this.
However, comments suggested that a potentially important reason for the switch to electronic only was missing from the options, namely convenience for the librarian:

"With online we have no theft, no claims, no check-in. Often there is free access to past issues which we may not have in print"  

"We could not monitor use of print and being able to assess the level of use will significantly change the way we manage our collections over the next 5 years”

However, some comments also noted that convenience to the end user was the driving force:

"Most important reason is to provide equal access for our distance/online programs”

"...ability to provide a better service to our users in terms of 24/7 access anywhere in the world and improved functionality”

"Most important reason for favoring online is immediate and timely desktop access for all - it is just a better form of delivery for journal articles and thus gains more use”

"Ease of access across a multi-site organisation is the main plus factor”

"Allows non-traditional users access, of which there are a growing number”

This probably suggests a slight misunderstanding as these issues are addressed where any electronic version of the journal is available (i.e. as part of a print plus electronic subscription); a move to electronic only is not a prerequisite, but nonetheless the comments demonstrate the importance that librarians attach to the convenience of online delivery.

3.5.3. Barriers to moving journal titles to electronic only

We then asked respondents to rank the four most important reasons why they had not moved more journals to electronic only. The responses are charted in figure 3.17.
The most popular reason cited was that the publisher does not offer electronic only. There are a number of likely reasons for this. Firstly, significant numbers of publishers still only offer “print plus electronic” subscriptions which, in the UK at least, has been a consequence of the VAT regime. Other issues relate to the licensing terms that are sometimes associated with electronic only offerings. One comment clarified the difficulty by stating that the “publisher does not offer [a] suitable site license” for their multi-campus institution and other comments also cited the restrictive nature of licences as a problem as well as difficulties with remote access.

Concerns about perpetual access also figured strongly, with several respondents providing comments to the effect that publishers do not understand the importance of this issue to librarians and have consequently been very slow to act.

Three of the four most important reasons are within the direct control of publishers and so it seems clear that, with a strong demand from library customers, publishers could and should be doing more to facilitate a move to electronic only.

### 3.6. Respondent’s attitudes towards publishers

We thought it would be interesting to poll librarians about their attitude towards journal publishers and to this end asked them in question 26 to state how strongly they agreed or disagreed with seven statements. Respondents could choose between ‘Strongly agree’, ‘Agree’, ‘Neither agree nor disagree’, ‘Disagree’ and ‘Strongly disagree’ for each question.
The percentage of respondents checking each answer for the seven questions is shown in tabular form below (table 3.3).

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal publishers add no value to scholarship</td>
<td>0.0%</td>
<td>3.9%</td>
<td>21.1%</td>
<td>64.5%</td>
<td>10.5%</td>
<td>76</td>
</tr>
<tr>
<td>I don't understand what journal publishers do</td>
<td>3.8%</td>
<td>3.8%</td>
<td>17.9%</td>
<td>42.3%</td>
<td>32.1%</td>
<td>78</td>
</tr>
<tr>
<td>Journal publishers won't exist in 5 years time</td>
<td>0.0%</td>
<td>5.2%</td>
<td>15.6%</td>
<td>55.8%</td>
<td>23.4%</td>
<td>77</td>
</tr>
<tr>
<td>I'd prefer to purchase from non-profit publishers</td>
<td>21.5%</td>
<td>24.1%</td>
<td>44.3%</td>
<td>7.6%</td>
<td>2.5%</td>
<td>79</td>
</tr>
<tr>
<td>Journal publishers are not innovative</td>
<td>0.0%</td>
<td>17.1%</td>
<td>31.6%</td>
<td>40.8%</td>
<td>10.5%</td>
<td>76</td>
</tr>
<tr>
<td>Subscription journals won't exist in 5 years time</td>
<td>0.0%</td>
<td>7.7%</td>
<td>19.2%</td>
<td>44.9%</td>
<td>28.2%</td>
<td>78</td>
</tr>
<tr>
<td>I would prefer it if the costs of funding journals</td>
<td>9.0%</td>
<td>17.9%</td>
<td>62.8%</td>
<td>7.7%</td>
<td>2.6%</td>
<td>78</td>
</tr>
</tbody>
</table>

Table 3.3 – Respondents’ attitudes towards journals and journal publishers

Publishers can take comfort from the responses that indicate that they are well understood by librarians and that they are seen by them as adding value to scholarship. However, a significant proportion of respondents do not believe that publishers are innovative and some do not believe that subscription journals will still exist in five years time.

Commentators on both sides of the open access debate will be interested to note that two and a half times more respondents support the funding of journals from the author/research funder-side rather than oppose it although the majority appear to be apathetic or ambivalent on this issue.

Each question is examined in more detail below.

3.6.1. **Journal publishers add no value to scholarship**

As figure 3.18 shows, 75% of respondents feel that publishers add value to scholarship with only a small minority (3.9%) believing that they do not. However, over a fifth do not feel strongly either way and publishers should not be complacent given some of the quotes that follow from respondents:

“Publishers are more concerned with revenue generation than with a genuine interest in scholarly communication or in making knowledge available”

“High publisher profit margins are not consistent with the aims or budgetary capacity of academic research institutions”
3.6.2. I don't understand what journal publishers do

74.4% of respondents believe that they understand what journal publishers do but 7.6% do not and just below one fifth neither agreed nor disagreed with this statement (figure 3.19).
3.6.3. **Journal publishers won't exist in 5 years time**

79.2% of librarians responding felt that journal publishers will still exist in five years time which will be of comfort to those publishers who do not intend to retire before 2014. However, 5.4% felt that journal publishers would have disappeared in five years time and a further 15.6% neither agreed nor disagreed.

![Figure 3.20 – Responses to 'Journal publishers won't exist in 5 years time'](image)

3.6.4. **I'd prefer to purchase from non-profit publishers**

45.6% of the responding librarians state that they would prefer to purchase from non-profit publishers with 21.5% indicating a strong preference to do so (see figure 3.21).

However, it should be borne in mind that elsewhere in the survey the profit status of the publisher was consistently considered to be the least important factor when making purchasing decisions (see sections 3.2.5, 3.3.2 and 3.4.3) and so it is not surprising that the largest cohort of responses did not care either way and therefore a majority of the responding librarians, 54.5%, have no preference to purchase from non-profit publishers.
Several comments indicated that they saw little difference between non-profit and commercial publishers:

"Both for-profit and non-profit publishers are in business to make money; the idea that non-profit publishers are not in the business to make money is a myth"

Some comments appear to draw more of a distinction between publishers based on their size rather than their profit status (although size may have been being used as a proxy for profit status) and indeed expressed animosity towards large publishing houses:

"Librarians attitudes toward the big publishing houses are that they are ruthless, greedy, and driven by unsustainable profit motives"

"My attitude towards... large publishing houses is open hostility; towards the smaller journal publishers and scholarly society publications and non-profits I feel pity and concern for their future. I feel like the big publishers are just going to gouge us as long and to the extent that they can get away with it"

And while one respondent did refer explicitly to the pricing policies of commercial publishers:

"We are gouged by certain publishers, mostly by for profits"

Another singled out non-profit publishers for criticism regarding post-cancellation access:
“Non-profit publishers in particular should rethink their current practices of not guaranteeing archival access to subscribed online-only journal volumes”

3.6.5. **Journal publishers are not innovative**

A narrow majority (51.3%) of respondents felt that journal publishers are innovative with slightly less than a third (31.6%) not feeling strongly either way and a significant proportion (17.1%) believing that journal publishers are not innovative (figure 3.22).

“There is a need for innovative pricing models and more efficiency within publishers”

![Figure 3.22 – Responses to ‘Journal publishers are not innovative’](image)

3.6.6. **Subscription journals won’t exist in 5 years time**

As figure 3.23 indicates, respondents to this question were generally confident of the future of journals, at least in the short- to medium-term with 73.1% feeling that subscription journals will still exist in five years time. However, just under a fifth (19.2%) of those responding were unsure and a significant proportion, 7.7%, believe that journals will not exist by 2014 which is quite surprising given the relatively short timescale in the question and the conservative nature of academics. This is possibly explained by a desire from some librarians to see an end to subscription journals as evidenced by one comment:

“I wish subscription journals wouldn’t exist in five years time, but I don’t think so…”
While other comments noted that the widely predicted death of print journals was premature and another postulated a change from the subscription model to wide-scale fulfilment by pay-per-view.

3.6.7. I would prefer it if the costs of funding journals were met from author/research funder-side rather than reader-side payments

More than two and half times more respondents favour (26.9%) rather than oppose (10.3%) a move to a business model that funds dissemination from the author / funder-side rather than from the reader-side. However, the majority of those that answered this question, 62.8%, did not feel strongly about the issue at all.

“I would like to see more publishing models convert to some form of open access (including short embargoes) and believe that this can be compatible… with the continued existence of publishers”
Figure 3.24 – Responses to “I would prefer it if the costs of funding journals were met from author/research funder-side rather than reader-side payments”

3.7. **General comments regarding pricing and the economy**

Several comments made in connection with librarian attitudes towards publishers pointed to tension regarding pricing policies and profit margins:

“The economy is BAD and the inflationary costs of serials is not sustainable”

“I don’t mind publishers making a profit, but I think that when their profits are far in advance of the CPI they become exploitive. And I wish that their representatives weren’t so arrogant. We find none willing to work with us on price, even given the current economic situation”

With other comments urging for restraint on price increases:

“Publishers should realize that annual price increases of 8%+ are unsustainable and should start adjusting to the economic downturn the way most other businesses and companies have had to”

“There cannot continue to be the ever increasing costs at 10-12% inflation which we have seen in the past”

This does tend to indicate that publishers have failed to communicate, at least to these librarians, the extent to which price increases are driven by factors like the increasing numbers of research papers being produced and published by the academy [11]. It also demonstrates that there is still resentment towards publishers arising from the double-digit increases which were perceived to have
been commonplace a decade or so ago and one respondent wishes to eliminate commercial incentives altogether:

“If the profit motive can be driven out of scholarly publishing, licensing and business models that are more consonant with the aims of the academy and of libraries are more likely to evolve”

This implies that this respondent at least does not believe that the profit motive is necessary to generate competition for quality editorial content which drives publishers to innovate and improve their journals.

There were also concerns about new journal launches:

“All publishers should consider slowing down the number of new journals and other products released each year. Customers simply cannot afford to support this huge growth in publishing anymore”

“Why are publishers wasting so much time and energy on new titles since there seems to be limited demand?”

These comments would suggest that these librarians do not fully appreciate that most journal launches are the result of demand from authoring communities.

4. Conclusions

- After a period where libraries have, on average, been able to purchase an ever increasing number of journals, respondents to our survey are predicting that they will only be able to provide access to around the same number of journals in 2010 as they did in 2009. There is some evidence to suggest that more journals will be purchased as part of ‘big deals’ with fewer being purchased as single subscriptions. Publishers who are unable to offer their content as part of a ‘big deal’ and those that are launching new subscription journals may well find 2010 a difficult year.

- A significant proportion of librarians responding to the survey state that they would prefer to purchase content from non-profit publishers, but the profit status of the publisher is not an important factor in any of the purchasing decisions surveyed.

- Studies have reported that a move to electronic only provision of journal content would yield considerable savings with some of these savings being made by publishers, but most accruing to libraries. Three of the four most important reasons cited by librarians for not moving more of their journals to electronic only are within the direct control of publishers and so it seems clear that, with a strong demand from library customers, publishers could and should be doing more to facilitate this move, particularly given the current economic climate. Publishers should therefore be encouraged to provide electronic only purchasing options and work with other stakeholders to address issues like post cancellation access.

- Librarians generally feel that they understand the role that academic publishers play in the dissemination and communication of scholarship and this role is valued by them. However, comments indicate that there is also tension between publishers and some of their library customers, particularly
with respect to pricing and profit margins. Whilst it would not change the
difference between the amount of material that libraries would like to buy and
what they can afford, it would perhaps aid understanding if the factors driving
price increases, like the continued growth in the number of research papers
being produced, were better understood by customers. Consequently the
scholarly publishing industry could perhaps seek to improve the
communication of the underlying reasons for the inflationary pressure on
prices to other stakeholders.

- Unsurprisingly librarians are looking for the most advantageous cost / benefit
  ratio when making their purchasing decisions. Usage statistics, both overall
  use and cost per use, are already very important tools used in determining
  whether to renew or cancel journal content either as part of a ‘big deal’ or as
  a single subscription. Publishers should therefore continue to make every
  effort to maximize the usage of their version of the article. Faculty still play a
  very important role in all purchasing decisions relating to single subscriptions.
  End user marketing will therefore remain a key activity for journal publishers
  who primarily sell their content as single subscriptions and these publishers
  will wish to continue to invest in this activity not only in spite of the downturn
  in the global economy but because of it.

- Librarians responding to the survey have a good understanding of open
  access publishing business models. 95% of respondents were aware of open
  access memberships and 36% are at an institution that has at least one
  active open access membership. However, more work needs to be done to
  minimise the burden of administrating open access publishing models and
  ensuring that expenditure is predictable. A significant minority (27%) would
  prefer publication costs to be met by author/funder side payments rather than
  reader side models, although the majority were ambivalent.
References

8. Ware, W. 2005, E-only journals: is it time to drop print? *Learned Publishing* **18**: 193–199
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# ALPSP survey of librarians - Responding to the credit crunch: What now for librarians and libraries?

## Introduction: ALPSP survey of librarians for ALPSP International Conference

ALPSP - the international association for non-profit publishers and those that work with them - is running this survey in order to inform a panel discussion entitled "Responding to the credit crunch: What now for librarians and libraries?" at the ALPSP International Conference which will be held from 9-11 September 2009.

The survey should take around 30 minutes to complete. Questions preceded by a star (*) require an answer but most questions are optional.

Obviously, the more information you can supply the better so please answer as fully as possible. However, don't worry if you are unable to answer a particular question - just move on!

There are a mix of quantitative and qualitative questions and if you are unable to answer a numerical question then please ignore it and move on to the next question. Please do try to answer the quantitative questions - we want to know your views and influences! If specific information is not readily available then please make an estimate if you are able (and tell us in the relevant comment box) or ignore that part of the question.

**Privacy statement**

Your privacy is important to us and this survey is anonymous. If you choose to supply us with your e-mail address we will endeavour to send you the results of the survey. We won't use your personal information for any other purpose or pass it to third parties.

## Number of journals available via your library

1. How many journal titles did your library provide unembargoed access to (where “unembargoed access” means access to the latest issues available at the time in electronic or print format) in each of the following years?

   Please fill in whatever information you have but if you are unable to answer this question then just move on.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td></td>
</tr>
</tbody>
</table>

2. How many journal titles do you think your library will provide unembargoed access to (where “unembargoed access” means access to the latest issues available at the time in electronic or print format) in 2010?

   Please provide an estimate if this figure is not yet known but if you are unable to answer this question then just move on.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td></td>
</tr>
</tbody>
</table>

3. Comments:
### 'Big deals' / discounted journal packages

*4. Does your organization purchase any 'big deals' / discounted journal packages?

- [ ] Yes
- [ ] No

Comments:

### Purchasing 'big deals' / discounted journal packages

In the following questions we would like to ask you about your purchases of discounted journal packages / journal collections (often called 'big deals').

5. Do you purchase 'big deals' / discounted journals packages

- [ ] as a single institution
- [ ] as part of a consortium
- [ ] both as a single institution and as part of a consortium

6. How many 'big deals' / journal packages did you have in total for each of these years?

   Again, please fill in whatever information you have but if you are unable to answer this question just move on.

   - 2000
   - 2007
   - 2008
   - 2009

7. How many 'big deals' / journal packages did you cancel in each of these years?

   Again, please fill in whatever information you have but if you are unable to answer this question just move on.

   - 2000
   - 2007
   - 2008
   - 2009

### Purchasing 'big deals' / discounted journal packages

We would like to know if you upgraded any of your big deals by trading up to a larger more expensive collection from the same publisher or downgraded any of your big deals by trading down to a smaller collection from the same publisher.
8. How many deals did you upgrade to a larger, more expensive package from the same publisher in each of the following years?

Again, please fill in whatever information you have but if you are unable to answer this question just move on.

2000
2007
2008
2009

9. How many deals did you downgrade to a smaller, less expensive package from the same publisher in each of the following years?

Again, please fill in whatever information you have but if you are unable to answer this question just move on.

2000
2007
2008
2009

10. Comments:

Your influences regarding 'big deals' / journal packages - new purchase

In the following questions we would like to ask you what influences your decision making regarding journal packages / journal collections (often called 'big deals').
**11. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to purchase a new big deal.**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Most Important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brings better cost per article for the content which our users need than any alternative</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Business model (i.e. how you pay for the content)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Content (large number of titles in deal)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Content (quality / prestige)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Faculty</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>High borrowing via inter-library loan</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Look of availability on aggregator site</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Licensing terms (i.e. what you are allowed to do with the licensed content)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or non-profit)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Volume of Pay per-view purchases</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Volume of ‘turnaways’</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

Comments:

**Your influences regarding 'big deals' / journal packages - renewals**
### 12. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to renew a big deal.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brings better cost per article for the content which our users need than any alternative</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Business model (i.e. now you pay for content)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Content (large number of titles in deal)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Content (quality)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Cost per use</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Faculty</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Lack of availability from aggregators etc</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Licensing terms (i.e. what you are allowed to do with the licensed content)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Overall usage</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or not-for-profit)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Volume or funding to other via Inter-Library Loan</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

**Comments:**

---

**Your influences regarding 'big deals' / journal packages - cancellation**
13. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to cancel a big deal.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Most Important</th>
<th>Second Most Important</th>
<th>Third Most Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business model (i.e. how you pay for content)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Content (largest number of titles in deal)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Content (quality)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Cost per use</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Faculty</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Good enough access from aggregator site</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Licensing terms (i.e. what you are allowed to do with the licensed material)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>More cost effective to take individual subscriptions supplemented by Pay per view/int-library loan</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Overall usage</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or non-profit)</td>
<td>❌</td>
<td>❌</td>
<td>❌</td>
</tr>
</tbody>
</table>

Comments:

Purchases of single journal subscriptions

14. In each of the following questions please fill in whatever information you have but if you are unable to answer a question just move on.

With respect to single journal subscriptions (i.e. those not purchased as part of a "big deal"/discounted journal package):

- How many single journal subscriptions do you have for the 2009 subscription year? ❌
- How many single journal subscriptions do you expect to have for the 2010 subscription year? ❌
- How many new single journal subscriptions did you purchase for the first time in the 2009 subscription year? ❌
- How many new single journal subscriptions do you expect to purchase for the first time in the 2010 subscription year? ❌
- How many single journal subscriptions did you cancel in the 2009 subscription year? ❌
- How many single journal subscriptions do you expect to cancel in the 2010 subscription year? ❌

15. Comments:

Your influences regarding single journal subscriptions - new purchase

In the following questions we would like to ask you what influences your decision making regarding single journal subscriptions.
16. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to purchase a new single journal subscription.

| Business model (i.e. how you pay for content) | Most important | Second most important | Third most important |
| Content (quality / prestige) | | | |
| Faculty | | | |
| High borrowing via Inter-Library Loan | | | |
| Interest in journal access or free subscription | | | |
| Lack of availability on aggregator site | | | |
| Licensing terms (i.e. what you are allowed to do with the licensed content) | | | |
| Profit status of publisher (e.g. commercial or non-profit) | | | |
| Volume of Pay per-view purchases | | | |
| Volume of ‘trawling’ | | | |

Comments:

Your influences regarding single journal subscriptions - renewals

17. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to renew a single journal subscription.

| Business model (i.e. how you pay for content) | Most important | Second most important | Third most important |
| Content (quality) | | | |
| Cost per use | | | |
| Faculty | | | |
| Lack of availability from aggregator site | | | |
| Licensing terms (i.e. what you are allowed to do with the licensed content) | | | |
| Overall usage | | | |
| Profit status of publisher (e.g. commercial or non-profit) | | | |
| Volume of lending to others via Inter-Library Loan | | | |

Comments:
Responding to the credit crunch: What now for librarians and libraries?

18. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to cancel a single journal subscription.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business model (i.e. how you pay for content)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content (quality)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost per use</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ease of fulfillment through inter-library loan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good enough access from aggregator site</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licensing terms (i.e. what you are allowed to do with the licensed content)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall usage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay-per-view is more cost effective than subscription</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profit status of publisher (e.g., commercial or non-profit)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments: 

Open Access memberships

*10. Does your organization have any Open Access memberships (for example 'PLoS Institutional Membership', BioMed Central / Chemistry Central / PhysMath Central membership or the 'Hindawi Institutional Membership program')?

- [ ] Yes
- [ ] No
- [ ] I don't know what an open access membership is

Comments: 

Your influences regarding Open Access memberships - new purchase

In the following questions we would like to ask you what influences your decision making regarding Open Access memberships.
20. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to purchase a new Open Access membership.

<table>
<thead>
<tr>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost / benefit (i.e. membership less than would pay in article charges)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desire to support Open Access business model</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or non-profit)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reputation / prestige of publisher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structure of membership scheme</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

---

21. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to renew an Open Access membership.

<table>
<thead>
<tr>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost / benefit (i.e. membership less than would pay in article charges)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desire to support Open Access business model</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profit status of publisher (e.g. commercial or non-profit)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reputation / prestige of publisher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structure of membership scheme</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

---

Your influences regarding Open Access memberships - cancellation
22. Excluding budgetary considerations, please indicate the three most important factors which influence your decision to cancel an Open Access membership.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost / benefit (i.e. membership more than would pay in article charges)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Faculty</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Profit status of publisher (+ e.g. commercial or non-profit)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Quality of title</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Reputation / prestige of publisher</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Structure of membership scheme</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Waning support for open access business model</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

Comments:

Moving to electronic only

23. Please state how strongly you agree or disagree with the following statement:

I would like to move more journals to electronic only.

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

24. What are your reasons for moving to electronic only?

Please rank your four most important reasons.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
<th>Fourth most important</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low usage / demand of print</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Saving on checking in / out</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Saving on re-stocking costs</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Saving on shelving space</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Saving on subscription price</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
</tbody>
</table>

Comments:
25. Why have you not moved more journals to electronic only?

Please rank your four most important reasons.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Most important</th>
<th>Second most important</th>
<th>Third most important</th>
<th>Fourth most important</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerned about perpetual access</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concerned about preservation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty still want print</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrastructure issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not a big enough price cut</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publisher does not offer it</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

Your attitude to publishers

26. Your attitudes towards journal publishers

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t understand what journal publishers do</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would prefer it if the costs of funding journals were met from author research fundor-side rather than reader-side payments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I’d prefer to purchase from non-profit publishers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journal publishers add no value to scholarship</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journal publishers are not innovative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journal publishers won’t exist in 5 years time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subscription journals won’t exist in 5 years time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

About your organization

27. In which country is your organization?

Country:
28. **Type of institution (please indicate all that apply)**

- [ ] Academic / University
- [ ] Government
- [ ] Public Library
- [ ] Hospital
- [ ] Corporate
- Other (please specify):

20. If your institution is a university, please define your organization using Carnegie Classification (if your organization is the USA), JISC Band (if your organization is in the UK) or by the full-time equivalent (FTE) students at your organization (for all other countries).

Please enter one only.

- Carnegie Classification (USA)
- JISC Band (UK)
- FTE students (all other countries)

30. If your institution is not a university, please enter the number of Full-Time Equivalent (FTE) employees.

FTE employees

31. The information gathered in this survey is anonymous. However, if you would like receive the results of this survey then please enter an e-mail address below. Your contact details will not be used for any other purpose and will not be disclosed to any third party organizations.

E-mail address

32. The results of this survey will be used in a plenary session of the ALPSP International Conference which runs from 9-11 September 2009 and may also be published. We may wish to quote comments supplied by you for illustrative purposes. Any quotes will be anonymous and will not be attributed to individuals or organizations.

- Please check this box if you do not wish for your comments to be used in this way.