Why Isn't The Library Link Linking To The Library?: Academic Libraries
Confront The New Competitive Marketplace

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Abstract: Administrative portals, e-braries, and other commercial information
providers are challenging the academic library's traditional monopoly as the
campus information gateway. Are these new information marketplace competitors
a threat or opportunity for academic libraries? Might they draw away the library's
user base or can they be harnessed to provide access to more and better digital
collections? This document examines the impact of these new competitors,
presents results from a survey of library directors about their responses to
information competition, and discusses strategies library directors can use to
maintain the library's status as the user's first choice of information provider.

**WHY ISN'T THE LIBRARY LINK LINKING TO THE LIBRARY?: ACADEMIC LIBRARIES CONFRONT THE NEW COMPETITIVE MARKETPLACE**

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Introduction

On the morning that a medium-sized research university debuted its new campus portal, the library director was hardly prepared for what she discovered. There on the main portal page, somewhere on the lower third of the web page, under the category "campus information resources" was a link that said "Library". That struck the director, who thought that the link should carry the official name of the library, as odd. Upon further investigation the director found something worse than odd. The link that said "Library" in fact did not link to the campus library. Rather, it linked to a web site that was nothing more than links to search engines, subject-organized links having no relevance to the institution's curriculum, links to the libraries of major research universities, and even worse, banner ads for "AskA" information services. The director had two immediate thoughts; who is responsible for this travesty and what do I do about it.

Variations on this scenario occur at college and university campuses nationwide as library directors discover their libraries are under siege by new forms of radical information competition. Just the word "competition" used in the same sentence with "campus library" is a radical concept for libraries have traditionally had no real competition. The advent of search directories, search engines, and AskA services has given the library's users information options. But these sources hardly pose real competition for the library's array of print and electronic databases, and of course, the librarians who provide help in finding and using the resources. On their campuses libraries have maintained a long-term, unchallenged position as the campus gateway to information. But a new wave of information marketplace competitors is challenging library directors to develop strategies to prolong the library's monopoly as the campus gateway to information.

Library directors, on their discussion lists, now express uncertainty, trepidation and perhaps even some genuine fear about how new information competitors will impact on the academic library's role as the information gateway for their institution. They know that students already seek the path of least resistance when researching, and that course management software systems offer faculty convenient ways to link to commercial information providers. An information competitor that can establish a truly formidable array of electronic resources, coupled with 24/7 assistance from trained professionals, and reasonable pricing, may gain the ability to supplant the academic library as the information provider of first choice among

students and faculty. This paper will explore these possibilities, and identify strategies that library directors may use to creatively respond to the challenges and opportunities presented by new information competitors.

Who are the New Information Marketplace Competitors?

This document identifies two types of information competitors. The first are those for-profit companies that typically sell access to their resources directly to students and faculty at subscription pricing, although they may offer institutional licensing options. This category of competitor includes:

- Questia Media
- XanEdu
- Jones E-Global Library
- ebrary

The other category of information competitors includes those internal to the organization, and consists primarily of purveyors of course management software and campus portals. Firms in this category could include:

- Blackboard
- WebCT
- Campus Pipeline
- Campus Cruiser
- Jenzabar

Course management software and portals create a passive form of competition. Faculty who use these tools may regard them as methods to improve student access to information resources. Creating competition for the library is not the objective. Still, once faculty create links to the product vendor's non-library resources, it will channel students away from the library's information gateway towards other, perhaps less rigorous resources. Direct competition is created when Blackboard, for example, offers a connection to Xanedu, one of their partners, enabling faculty to easily add the Xanedu information resource directly to the course page.

Here is a brief description of each potential external library competitor:

- Questia Media: Provides an online library that will someday make available approximately 50,000 digitized titles, primarily books in the humanities and social sciences, along with content from a collection of scholarly journals. Questia markets it service directly to students. Its most common subscriptions are annual access for $149.00 or monthly access for $19.95. In a recent article in the *Houston Business Journal* Troy Williams, founder and CEO of Questia Media, wrote "online libraries provide a solution…by reproducing the qualities of traditional libraries while opening up access to information and knowledge." [1] Statements such as these, in which Questia is equated to the academic library, raise the hackles of academic librarians everywhere.

- Xanedu: Unlike Questia, which is creating a database of entirely new e-content, Xanedu recycles from its existing database content, and re-packages it for direct marketing to faculty. Owned by ProQuest (previously Bell & Howell), Xanedu can tap the enormous Proquest databases that include journal articles, dissertations, microfilmed newspaper, and other academic content. The service is marketed to faculty, who then encourage students to subscribe at rates of approximately $10 per

month. Xanedu is marketed in professional literature targeted to faculty, at faculty conferences and is offered through partners, such as Blackboard.

- Jones E-Global Library: Marketed to institutions as either a supplement to or substitute for a brick-and-mortar library, E-Global was developed as the virtual library of Jones International University. It provides access to a limited number of databases that would fail to meet all the curriculum needs of any institution. Its best offerings are many online research guides and a staff of over 40 around-the-clock librarians, the type of digital resources institutions need to support students in distance learning programs.

- ebrary: This company may have the most interesting business model. Create a substantial collection of digitized books and other materials, and then allow free access. Users pay only for what they print or download, at costs that hardly exceed library photocopy prices. Ebrary is likely to market the service to just about everyone, faculty, staff, students and librarians, as it will depend heavily on large traffic volume. Unlike Questia, ebrary has no paper writing tools. It does have an impressive group of publishers ready to provide content.

Survey of Library Directors: Methodolgy

While the general response of library directors to these new competitors ranges from strong mistrust to cautious uncertainty, there is no real method for determining how library directors plan to respond to these new competitors, or for that matter, how much they know about these companies. To ascertain more information about the extent to which library directors know about them and how they are reacting to them, the author conducted a survey of a cross-section of academic library directors.

Using an online version of the *American Library Directory*, which is File 460 on the Dialog Information System, a search was constructed to find all libraries identified as "college" or "university", that also had a budget over $1 million, and that had a staff position identified as "director" or "dean." The search resulted in a set of approximately 2,000 libraries. A statistical formula was used to determine that a sample size of 300 libraries would provide an acceptable level of statistical precision. A random numbers generator was then used to create a list of 300 numbers between 1 and 2000. Those matching records from the *American Library Directory* were retrieved. After dropping directors whose e-mail address could not be found, 207 library directors received an e-mail containing the link to the survey document. Sixty-eight directors responded to the survey for a 32.8% response rate. Those interested in examining the questions asked can find the survey at http://intercom.virginia.edu/SurveySuite/Surveys/compsurvey

Findings from the Survey of Library Directors

The survey was designed to elicit the following information from the respondents and their institutions:
- the number of libraries where a portal or CMS is in use;
- activity among users of the portal or CMS with respect to creating competition for the library;
- the level of library director's knowledge of new information marketplace competitors;

- the director's attitudes and responses to actual or perceived competition to the library.

The survey respondents reflect a broad cross-section of academic institutions, with the concentration occurring among four-year and comprehensive institutions. The respondents are skewed towards the comprehensive university in this survey. According to Table 247 in the 1999 *Digest of Education Statistics*, page 284, four-year colleges outnumber comprehensive universities by 802 to 569. There are far fewer research and doctoral institutions (240). **Tables One and Two** (see Appendix) provide a summary of the demographics of the survey respondents.

Respondents were asked to indicate if their institution currently made use of either a portal or course management software system (CMS). Many more have a CMS. Whereas only 19 respondents (27%) reported having a campus portal, 63 (92.6%) reported having a CMS system. The most popular CMS was Blackboard's CourseInfo (55.8%) while WebCT accounted for the rest excepting 4.5% reporting "other." Among those reporting a portal, the majority (66%) indicated their campus uses a "homegrown" system. The other 34% was nearly equally divided between commercial vendors such as Campus Cruiser, Jenzabar and Campus Pipeline. Several of the library directors (26%) reported that the link to the library on the portal page is difficult to find. The majority (63%) reported that the link to their library is prominently placed on the campus portal. Several respondents appear to have more than one system because only 63 respondents indicated having a CMS, but there are 68 total responses. Other systems included E-College, Web Course in a Box, and WebFX (a homegrown system).

Directors whose institutions offer a CMS system were asked about their knowledge of whether faculty provide links on their course pages to the library (**Table Three**). The majority of the library directors are paying attention to the need for faculty members to encourage library use through the placement of a link or links to the library in strategic places on the course page. The library director and staff can promote faculty linking to the library by proactively collaborating with faculty. The respondents were asked if they or their librarians perform this type of outreach activity (**Table Four**). The majority of the respondents indicate they encourage faculty to create links to the library. Still, a fair number do not or are just considering do so. On many campuses the library manages the CMS, and this can help in influencing faculty to link to the library. One area where library directors may exert less influence on faculty is in the placement of links to commercial information providers.

The directors were asked about the level of this activity among their faculty using CMS software (**Table Five**). This provides some evidence that faculty are indeed creating links to non-library research entities on their course pages. A cause for concern is the significant number of library directors who do not know what, if any, links to non-library research sites faculty are linking to on their pages. This indicates that directors need to connect with faculty to both promote links to the library, and to learn of those non-library resources to which they are linking.

Data in **Table 6** identifies the directors' degree of knowledge of the different competitors that are external to the institution. Not surprisingly, Questia has the highest recognition among the true competitors. Though NetLibrary is highly recognized among the library directors, it is not in the purest sense a competitor. NetLibrary sells no subscriptions directly to faculty or students, and is already in place in many libraries so high recognition is expected. In some ways Questia is the library profession's "poster boy" for direct competition, so it too has gained

recognition. Because Xanedu targets faculty directly there is less surprise that directors find it unfamiliar.

The survey also examined library directors' attitudes towards information competitors, and the directors would respond to competition. First, the respondents were given a series of statements about information competitors to which they indicated the degree that they agree or disagree with the statement. The author expected that a larger percentage of the respondents would disagree with the statement. (**Table 7**) Since there is some identifiable action by information competitors on their campuses, it is understandable that approximately 20% view competitors as potential threats. While a large number of the directors appear confident that their libraries will not lose ground to competitors, an even larger number are uncertain about the entire dilemma.

While 43% of the respondents may not see information competitors as a threat, at least 35% do believe these companies are here to stay or are convinced enough of their staying power to agree they will not, like many dot.coms, be short-lived enterprises. (**Table 8**) That so many believe information competitors will remain on the scene and yet are not threatened by them suggests that library directors believe they can co-exist with these firms or that their presence cannot take away from what the academic library offers. The results in **Table 9** suggest that directors are confident that their libraries offer services that will continue to draw their constituencies, despite what the competitors provide. The responses to the question presented in **Table 10** however show no real consensus on whether or not directors believe it is their job to keep information competitors off their campuses. Many of the directors provided comments about their role in responding to competition. Some said that they would not directly act to counter what information competitors would do, but would only do their best to promote what the library offered and educate users about the inadequacies of the competition. Others indicated that they would be more aggressive in their efforts to compete.

It is difficult to formulate questions that ascertain how library directors would respond to competitive pressures. The survey was completed with several questions that presented hypothetical questions that required respondents to choose from two different courses of actions. The goal was to gain some insight into the mindset of the directors as they confront different competitive scenarios. **Table 11** shows the majority would respond passively if they discovered their faculty linking to information competitors. Some respondents commented that rather then discuss this directly with faculty they would pursue other avenues, such as campus-wide awareness campaigns intended to alert faculty about why the library can offer more than its competitors.

On some campuses Questia did set up booths in order to sell subscriptions to students. Though many librarians found this disturbing, **Table 12** indicates most directors would act conservatively. Some commented that they doubted they could make such a thing happen on their campus. Some suggested pushing for removal might send the wrong message, one of censorship or fear. Most suggested they would accomplish more by making their constituents aware of what the library offers, and how that is superior to competing services. Despite that, a not inconsequential number indicated they would act more aggressively.

For **Table 13** the directors were presented with a Provost who decided money could be saved with a subscription to Jones E-global library. While several directors commented that they thought the word "challenge" was too strong a word, the majority would certainly seek to discuss such a directive. Unlike the other hypothetical situations, this one is far more substantial in its

ability to harm the library by denying it resources. That may account for the near solidarity among the directors in their response to challenge the Provost.

Numerous respondents provided comments at the end of the survey, particularly in response to the hypothetical questions. As expected, many indicated they would be more likely to take some alternate action to those offered in the questions. Most focused on education and marketing to alert, in a positive way, faculty and students about the library's offerings, rather than delivering, what in an election would be called a "negative campaign", against a competitor. Despite what weaknesses these questions might have, they do provide some picture of the degree to which library directors are thinking about ways in which to deal with competitors.

How Organizations Respond to New Competitors

Our world is increasingly one of great choice where consumers expect many options. In the 1970s there were 140 motor vehicle models from which to choose; there are 260 today. An average supermarket has 40,000 different products on its shelves. In the 1970s Colgate offered two different toothpastes while they presently offer 17 different types of toothpaste.[2] It is no surprise that library constituents anticipate or even welcome some new choices in how and where they can retrieve information. Competitors will find ways to partially duplicate library collections or capitalize on college students willingness to take whatever information they can get with the least amount of effort, especially if there are added-value tools, such as free term paper proof reading. Prospering in this environment requires some knowledge of business competition.

Academic librarians tend to lack business acumen. The traditional curriculum of library science pays little attention to marketing or techniques for achieving success in a competitive environment. Fortunately, libraries are not alone in the predicament of engaging with new competitors. In recent years industries such as banking, auto dealers, insurance and supermarkets have found themselves confronting new competition in the form of dot.com enterprises, not unlike what libraries are experiencing. Owing to the competitive upheaval occurring in many industries there is a growing body of literature communicating strategies for surviving the infusion of new competition. Recommendations from the business literature for challenging new competitors fall into several categories:

- **Knowledge of the Environment:** Businesses must know their competitors and the environment in which the competition is taking place. Competitive intelligence is commonplace in the corporate world, but quite foreign to the library sector. Among the Inc. 500, 343 companies reported spending some part of their week on the task of competitive intelligence. Lois Mitten, CEO of the Children's Discovery Center hires mystery shoppers to gather information about her competitors and her own center's competitiveness. [3] If you don't know the competition, you can't outsmart it.

- **Customer Service**: Many industries beset by new competitive forces are focusing their efforts on becoming customer-centric or even customer-adaptive. This means listening to customers describe their experiences and needs; resources, marketing and services are modified based on what customers have to say.[4] If businesses can better understand the wants and needs of their customers, they can shape customer services to conform to those desires, resulting in a customer who will return to the business rather than seeking out rivals.

- **Technology**: Swatch is a company using technology to achieve competitive advantage. It achieved great success by integrating pager devices into watches; they captured a significant percentage of the pager market in countries where the watch is sold.[5] These and other examples show that companies do not necessarily need the latest and greatest technology, but need to be creative in developing imaginative uses of technology.

- **Marketing**: What business doesn't market its products or services? Until recently most energy suppliers, especially electric companies, had regional monopolies. The lack of competitors demanded little marketing. The advent of deregulation changed that and now electric utilities are battling multiple competitors. The slightest concern that power from a new entrant into the market might not be entirely reliable is enough to get many customers to stick with good old Big Power.[6] Marketing strategies that expose competitors' weakness and reinforce the long-standing strengths of the traditional provider are being used by large utilities.

- **Self-Assessment**: Organizations in a new competitive environment should conduct a self-assessment in order to determine where they are most prone to a competitor. Hartford Hospital, flagship of the Connecticut Health Systems, was a typically challenged health care organization. Needing to gain competitive advantage in its region, it used the Malcolm Baldridge self-assessment to identify strengths and weaknesses. As an outcome of the process, Hartford Hospital developed a highly admired complaint management program.[7]

- **Differentiation:** In a market with many choices, for a product to emerge as the clear choice it has to be distinctly different in such a way that consumers will know why it is different and a superior choice. Theodore Levitt, the Harvard marketing guru, wrote a book titled *The Marketing Imagination*. In it he stated that any product or service could be differentiated. Consider how many toothbrush brands are available. Oral-B created a powerful source of differentiation with a toothbrush that tells customers when they need a new one.[8]

- **Staff Resources**: The business leader is only as good as the staff he or she develops and the resources with which they are equipped. "People -- and productivity growth through people -- are increasingly the winning edge determining the competitiveness both of companies and countries," contends Frank P. Doyle, General Electric Co.'s corporate vice president for external and industrial relations. The "advantage will go to companies that are lean and agile; to managers who listen and leaders who communicate; to cultures that are entrepreneurial and liberated; to people who are technically and culturally fluent and flexible," Mr. Doyle believes. [9]

- **Alliance Building**: A more rare strategy for organizations faced with new competition is to explore the possibility of new alliances. Alliances may form to strengthen one of the partners. The alliance may be with the new competitor. Many business alliances are formed for reasons that are preemptive. Although there may be a positive result for both companies, the dominant motivation for one or more of the partners is to block a competitor from partnering with a company in a particular market or application.[10] In the case of the preemptive alliance, two or more firms join forces to take on a new competitor.

Recommendations for Library Directors: Responses to New Information Competitors

To develop a personal or organizational strategy for coping with new information marketplace competitors, library directors can adapt the techniques identified above. This section of the paper will consider how they might be practiced in academic library settings. For example, few library directors could demonstrate, with the exception of Questia and NetLibrary, some knowledge of key competitors. Library directors need to develop a keen sense of what is happening in the external environment. The environmental scan should be a routine part of the library planning exercise. To aid in this process directors need to acquire information from library industry sources, as well as those from peripheral fields, including but not limited to higher education, computing technology, internet development and educational technology. Limiting oneself to library information is a sure way to miss valuable news about potential competitors. Xanedu, for example, receives almost no coverage in the library literature. Since the product is marketed directly to faculty, it is typically discussed in the literature of higher education, not librarianship. The best information about Questia is found in papers from Houston, where the company is headquartered. Those stories were often reported in lesser-known weblogs such as *LISNews*, not the mainstream library journals. Once competitors are identified directors should test the services to find out what they offer, how they work, and how they are priced. Then, a competitive analysis can identify what potential challenges the competitor presents.

What can academic libraries offer their patrons that Internet-based competitors cannot? Personalized service delivered by caring, customer-driven library staff members. How many libraries do what is necessary to cultivate and develop such a staff members? Not enough of them. In a competitive environment, the library must give users a reason to want to come to the library. How many academic libraries are continually surveying users to assess the quality of services and needs of users? How many academic library directors are creating customer-adaptive services? Directors must find ways to build customer-adaptive services. The ultimate test of any customer-driven services is to ask the question, "would they pay for this resource or service?" If the answer is no, directors must determine if the service is even necessary. If it is, then it should be restructured so it satisfies users to the degree that they'd pay for the service.

With their venture-capital laden war chests, library competitors can acquire and support the latest technologies. While our technology is typically good, the competition has the financial resources to develop better web sites, create larger and more sophisticated databases, and employ more tools and new technologies for marketing their services to our users. For example, how soon will our library webs be ready for wireless and handheld computing? Competitors are likely already working on these new delivery technologies. Directors must assess whether existing technologies can be better leveraged to attract and serve users. Consider, for example, libraries that have developed "my library" web sites that allow users to customize the library web site. Tools such as OCLC's SiteSearch or WebExpress can be used to create a single, uniform interface to multiple databases to reduce user confusion about database interfaces. Technology is the great equalizer. Used wisely, directors can employ technology to attract and keep users connected to the library web site.

Marketing should be at the top of the director's " here is something I can do now" list. There is no dearth of literature about or ideas covering those things libraries can do to better promote themselves. As with technology, academic libraries will be distinctly disadvantaged when it comes to competing with the competition's slick marketing campaigns that can include

both radio and television advertising. Library directors cannot compete financially, but do have direct access to the campus constituents. They know the constituents' demographics and their needs. Typical competitors know little or nothing about our courses, curriculum or regular assignments. Directors can use this to their advantage when developing marketing strategies. It can help to understand the capabilities of competitors' products. For example, just knowing the pricing models and structures of competitors enable library directors to point out how the library offers better value.

Self-assessment is an exercise with which library directors are familiar. Periodic user satisfaction surveys are frequently used to assess user attitudes. Unfortunately, users often report satisfaction with services we know need vast improvement. Self-assessment exercises should be modeled on the type of self-study libraries perform when preparing for a major accreditation review. Studies of this sort may require the library to assess itself against some accepted standard of quality performance. This might include an examination of libraries at peer institutions to identify areas in which the library exceeds or fall short of expected performance levels. The library could then identify how well it compares to that competitor, and what it needs to change from a position of weakness to one of strength.

Companies can develop new products that are intentionally different from existing products, like the toothbrush that tells you when it needs replacement. At best, a library director may only be able to point to those features or advantages that differentiate the library's resources. Consider the case of a portal's library link that simply contains links to freely available Internet sites. The library's more extensive array of electronic resources could be promoted for the unique and different assets it offers faculty and students. Directors have a "built-in" differentiation from the commercial competitors. The library's resources are unique to that institution; they were selected to meet the needs of the faculty and students, and are tailored to support the curriculum. In order to reach potential customers at all institutions, new market competitors develop products that are generic and therefore less useful to any campus. Library directors can use this to their advantage.

Well trained staff that understand the value of customer service can make all the difference in giving users a reason to come to the library, A staff that creates an environment of patron hostility will surely send patrons away vowing never to return. The director needs to take responsibility for creating an environment that welcomes patrons and invites them to enter and stay. This means developing a customer-driven staff. This can be accomplished by sending staff to customer service workshops, as well as the conferences and programs needed to maintain high levels of skill. Consistently good service can be difficult to achieve in libraries that make heavy use of student workers. Many libraries offer their students customer-service training, but nothing is quite so effective as customer-driven staff for setting examples of excellent service.

Can the type of alliances being used in business to ward off competition be adapted by libraries? This is questionable, but the possibilities are being explored. Some libraries are considering whether alliances with the competition are good for their constituents. At least one library has initiated a plan to purchase Questia subscriptions for its students. That's a novel approach, and suggests it might be prudent to embrace rather than retreat from the competition. Ebrary is not gearing its services to libraries, but a library could initiate an account to subsidize usage in order to obtain books found on ebrary not owned by the library. Some competitor's tools might strengthen the library's collections. The key is for the library director to take the campus lead in creating these alliances, rather than waiting for competitors to create alliances with students and faculty.

These recommendations represent just some of the strategies library directors can use to attract and maintain high constituent usage. There are other ones. For example, many academic libraries are adding coffee lounges to offer a social component to the existing intellectual environment. Computer commons are effective at drawing students into academic libraries. There is no doubt that libraries will continue to face new forms of competition. Library directors who become well versed with these competition-fighting strategies will be positioned to maintain their strategic advantage over competitors entering the information marketplace.

Conclusion

Owing to the rapid pace of change in the marketplace, by the time this paper is read or within a few months of its publication, the landscape for new information competitors will change. Some of the companies may disappear, some may re-structure themselves, and new competitors may surface. As a result of this ceaseless competitive change, academic libraries can bid farewell to the days of being the campus information monopoly. Whatever change the external forces of competition thrust upon academic libraries, their directors must question when competition is the path to follow and whether it is compatible with library goals, especially when the answers point to adopting the competitive strategies of business. Many librarians cringe at such talk. For them, re-thinking the library in a business model is anathema. To simply attribute these new developments to dot.com enterprises or to the entrepreneurial initiative (or greed) of a few companies misses the significance of the new competitive realities at hand.[11]

The objective of this paper was to examine the new atmosphere of competitiveness in academic librarianship. An analysis of library director responses to questions about new information marketplace competition leads to the conclusion that academic library directors needed stronger skills to prepare themselves for this new competitive environment. The type of skills and abilities needed were identified as a series of recommendations. In his *Harvard Business Review* article on the changing competitive landscape for nonprofit organizations, William Ryan states "the point is not whether nonprofits can survive competition (or possibly opposition), but whether nonprofits can adapt without compromising the qualities that distinguish them from for-profit organizations."[12]

Library directors, as they challenge competitors, must remember to adhere to the basic values that make academic library communities strong. These values include the focus on personal attention and quality customer care, the support and defense of intellectual freedom and property rights, and dedicating the organization to humanizing services in the age of technology. The mission of the library director, most certainly, is to do whatever is necessary to maintain the library's mantle as the primary campus gateway to information sources. That is an admirable goal. But library directors who fail to let the profession's basic values guide the process will pay a high price. They may ultimately defeat the competition, but will lose in the long run if they lose sight of the values that will always distinguish academic libraries from the competition.

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[10] Segil, Larraine, "Preemptive Alliances," *Industry Week*, August 21, 2000, v.219(13), p. 27.

[11] Ryan, William P., "The new Landscape for Nonprofits," *Harvard Business Review*, January-February, 1999.

[12] Ryan, "The New Landscape for Nonprofits."

**APPENDIX A – Tables**

### Table 1 – Type of Institution

| Community or Two-Year | 2 | 1.47% |
|---|---|---|
| Four Year College | 24 | 35.29% |
| Comprehensive University | 30 | 44.12% |
| Research University | 10 | 14.71% |
| Other (medical schools) | 3 | 4.41% |

### Table 2 – Size of Library Budget (salary and materials)

| Less than $500,000 | 11 | 16.42% |
|---|---|---|
| $500,000 - $1 million | 21 | 31.34% |
| $1 million - $2 million | 18 | 26.87% |
| $3 million - $4 million | 9 | 13.34% |
| Greater than $5 million | 8 | 11.94% |

### Table 3 – Do Faculty Provide a Link to the Library on their Course Page?

| Yes | 27 | 42.1% |
|---|---|---|
| No | 3 | 4.6% |
| Do Not Know | 20 | 31.2% |
| Other | 14 | 21.8% |

### Table 4 – Do Librarians Encourage Faculty to Provide a Link to the Library on their Course Page?

| Yes | 43 | 63.4% |
|---|---|---|
| No | 11 | 16.1% |
| Considering Doing This | 11 | 16.1% |
| Other | 3 | 4.4% |

**Table 5 – Do Your Faculty Provide a Link to Other Sources of Information or Commercial Information Providers on their Course Page?**

| | | |
|---|---|---|
| Yes, We Know Some Who Do | 19 | 30.1% |
| No, None We Know Do This | 8 | 12.7% |
| Do Not Know | 34 | 53.9% |
| Other | 2 | 3.2% |

**Table 6 – Library Director Knowledge of Commercial Competitors**

| Competitor Name | Know It Well | Familiar With It | Know Little About It | Never Heard of It |
|---|---|---|---|---|
| Questia | 10% | 57% | 20% | 8% |
| XanEdu | 4% | 19% | 52% | 25% |
| Ebrary | 3% | 23% | 55% | 16% |
| Jones E-Global | 1% | 18% | 50% | 30% |
| NetLibrary | 46% | 40% | 8% | 6% |

**Table 7 – Commercial Information Providers Are a Potential Threat to the Library's Status As Primary Campus Information Gateway**

| | |
|---|---|
| Strongly Agree | 4.4% |
| Agree | 16.4% |
| Neutral | 35.8% |
| Disagree | 31.3% |
| Strongly Disagree | 12% |

**Table 8 – Commercial Information Providers Are Just One More Set of Dot.com Enterprises That Will Fail and Go Out of Business**

| | |
|---|---|
| Strongly Agree | 2.9% |
| Agree | 17.9% |
| Neutral | 40.4% |
| Disagree | 28.4% |
| Strongly Disagree | 10.44% |

**Table 9 – The Library Gives Something Special (e.g., materials, staff assistance, space, etc.) to Students and Faculty That Won't Be Affected by Commercial Information Providers**

| | |
|---|---|
| Strongly Agree | 28.3% |
| Agree | 40.3% |

| | |
|---|---|
| Neutral | 10.5% |
| Disagree | 16.4% |
| Strongly Disagree | 4.5% |

**Table 10– It is the Library Director's Responsibility to Act to Counter Commercial Information Providers That Offer or Sell Their Services Directly to the Library's Constituents**

| | |
|---|---|
| Strongly Agree | 12.1% |
| Agree | 27.2% |
| Neutral | 19.7% |
| Disagree | 25.6% |
| Strongly Disagree | 15.1% |

**Table 11 – Response to Discovering Faculty Linking to Information Competitors**

| | |
|---|---|
| Contact Faculty | 33% |
| Do Not Contact Faculty | 67% |

**Table 12 – Response to Discovering an Information Competitor Selling Services to Students at a Student Center**

| | |
|---|---|
| Ignore Presence of Competitor | 73% |
| Act to Have Competitor Removed | 27% |

**Table 13 – Response to Provost's Directive to Subscribe to an Information Competitor as Alternative to Hiring an Additional Librarian**

| | |
|---|---|
| Follow Directive | 4% |
| Challenge Directive | 96% |