

Survey on Discovery Services: April 2010

Forty-one members completed the survey, representing 30 unique, identifiable organizations. The breakdown is as follows: A&I Service (21), Publisher (3), Library (1), Vendor (1), and Other (4). Twenty-four (58.5%) of the respondents were the Assembly representative for their organization. The results are as follows:

1. With which of the following discovery services are you familiar (check all that apply)?

Summon:	78%	(32)
EBSCO Discovery Service:	70.7%	(29)
WorldCat Local:	70.7%	(29)
Primo Central:	43.9%	(18)
Encore Discovery:	12.2%	(5)
Blacklight:	7.3%	(3)
LibraryFind:	2.4%	(1)
Other:	9.8%	(4)

Others: DeepDyve, DeepWeb Technologies, FirstSearch, Compendex, PubMed, Medline.

Comments:

- a. I think all “hosts” are discovery services, e.g. Dialog, Ovid, etc.
- b. I am familiar with IFI’s Custom Indexing Services which are done by experienced human indexers with subject knowledge in the technology being indexed.

2. Is your organization currently partnering with a discovery service?

Yes:	53.7%	(22)
No:	36.6%	(15)
Don’t know:	9.8%	(4)

3. If you answered “No,” does your organization plan on partnering with a discovery service in the next 6-12 months?

Yes:	35.3%	(6)
No:	17.6%	(3)
Don’t Know:	47.1%	(8)

Comments:

- a. We have our own major search engine implementation that does some of what these services intend to do. Also, we are not a library, but a Web-site operation.
- b. We are looking at the opportunities and are in discussions

4. Does your organization perceive the new discovery services as an opportunity, threat or both?

Opportunity:	34.1% (14)
Threat:	2.4% (1)
Both:	48.8% (20)
No Opinion:	14.6% (6)

Comments:

- a. For A&Is they could be a real threat, even though the owners are pushing for A&I involvement saying no one will see the content unless they license the A&I service. For full text, they appear to be an opportunity to increase discoverability and use; however, they are too new to evaluate the reality.
- b. For customers like libraries, usage becomes a vital statistic in determining how their monies are spent. High usage is a good ROI for a database or other content product, if not the only reason to subscribe. Discovery services provide means to enhance the visibility and access to eContent. It is imperative that the rights of content owners are protected in the way access is provided.
- c. It very much depends on the context of implementation.
- d. These services may expose our content to users who would never think to choose our database for their search, and my fear is that if we are not "in" then we are well and truly "out". On the other hand, we may lose brand recognition and if their usage reporting isn't sophisticated enough, how will the library know that it was our database that navigated the user to the full text? So we risk losing out this way, too. We are also a full-text publisher, so improving navigation to our e-book content is a bit of a "no-brainer."
- e. The threat is competition for scarce resources from an expensive new service in a time of tight/declining budgets.
- f. Authentication is a problem with Index and Abstract databases... Access should be made available only for customers... reference to the original citation source should be made... statistics for searching by Vendor should be made available.

g. To date, it appears that the model for “discovery” works well for full-text players since the thin metadata is provided freely as a means to encourage subscriptions to the full text, but we are trying to understand why an organization like ours (where our Index still makes up the majority of our revenue) would participate (e.g. If we give away “thin” data from our index records for free which could lead unauthenticated users to other full text via open URL resolvers or other links, will our full index records and database lose value?). By not participating, would our data eventually become obsolete because competitive products would be more “findable?” Even if we do participate, would our records be findable if records for duplicate material (i.e. the same journal article) are also available from multiple sources? We are also concerned about the amount of work/costs that we would have to invest without knowing outcomes.

h. The issue has not arisen with us.

5. What do you believe are the benefits of partnering with a discovery service (check all that apply)?

Broad exposure of content:	87.8%	(36)
Improved search speed for users:	46.3%	(19)
Better search results:	29.3%	(12)
Other:	14.6%	(6)
No opinion:	9.8%	(4)

Other:

- a. These engines are a response to the one-stop shopping desires and the slowness of federated search engines that much go to each interface. The central index should dramatically increase speed. How good the results are remains to be seen.
- b. Increased usage.
- c. Potential to increase usage of our database.
- d. Easy, high quality retrieval.
- e. Improved delivery of full text.
- f. Easier ability to locate content in local holdings.
- g. Additional revenue streams.
- h. Survival....I view the discovery services as a game changer. If you are not there, you will be cancelled since use will decline.
- i. High usage is a good ROI for a database or other content product, if not the only reason to subscribe. Discovery services provide means to enhance the visibility and access to e-Content.

6. If your organization is currently partnering with a discovery service, have you perceived any of the following (check all that apply)?

No change:	38.1%	(8)
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Increased usage:	33.3%	(7)
Other:	28.6%	(6)
Increased revenue:	9.5%	(2)
Improved search results	9.5%	(2)

Other:

- a. It's too soon to tell, and none of the services are providing reports of referrals. We distribute our content via multiple vendors and have always had high usage. Frankly, I'm not expecting enormous changes.
- b. Increased referrals to our own content delivery site.
- c. Too early to answer.
- d. Still too new to determine.
- e. N/A
- f. Too soon to tell.
- g. Not sure as we don't know how to measure accurately the impact of these services.
- h. We are only in the beginning stages of partnering.

7. What do you see as the downside of partnering with a discovery service (check all that apply)?

Potential loss of brand identification:	58.5%	(24)
Inaccurate usage statistics:	56.1%	(23)
Potential low ranking of search results from our content:	48.8%	(20)
Terms/conditions of the relationship:	46.3%	(19)
Loss of search parameters:	36.6%	(15)
Currency of the unified index used in searching:	31.7%	(13)
Potential loss of revenue from other sources:	26.8%	(11)
I see no downside:	17.1%	(7)
Other:	14.6%	(6)
No opinion:	7.3%	(3)

Other:

- a. Right now no one is providing any kind of statistics. They cannot really supply usage stats, but they should be able to provide referral statistics.
- b. Possible weakening of the case to subscribe to a particular database.
- c. Competition for scarce resources from an expensive new service in a time of tight/declining budgets.
- d. Reduction in search activity on our own site, reduction in overall user activity (time on site, etc.) and potential for lower usage since discovery is happening elsewhere.

- e. Not being able to retract data.
- f. Authentication.
- g. Why should/would an A&I traditional content organization with a primary revenue stream of Indexing data participate in a venture where “surface level metadata” is given away “for free?”
- h. Inaccurate holdings information.

8. If your organization is currently partnering with a discovery service, have you experienced any of the following downsides (check all that apply)?

No downsides:	33.3%	(6)
Other:	33.3%	(6)
Loss of brand identification:	27.8%	(5)
Low ranking of search results from our content:	16.7%	(3)
Loss of search parameters:	16.7%	(3)
Inaccurate usage statistics:	16.7%	(3)
Decreased currency of search results:	16.7%	(3)
Undesirable terms/conditions:	5.6%	(1)

Other:

- a. It's too early to tell. Only Summon has really been in operation any time.
- b. Too soon to know
- c. Not yet, but we are only using WorldCat
- d. Too early to answer.
- e. Nothing yet.
- f. Still too new.
- g. N/A
- h. Too soon to tell.

9. If “terms and conditions” are a concern, which ones are important to you (check all that apply)?

Authorized use/user authentication:	93.1%	(27)
Usage reports:	89.7%	(26)
Frequency of updates:	65.5%	(19)
Usage restrictions:	51.7%	(15)
Audits:	34.5%	(10)
Other:	6.9%	(2)

Other:

- a. Post-termination clauses.
- b. Who is allowing institutions to "opt-in" instead of carefully confirming subscriptions? How are end-users verified?

- c. Are the discovery services "paying" license fees for content? We need a level playing field in what we charge for content.
- d. Frequency of updates is a particular concern. Authorized use may not be a concern for those services that are separated from a delivery platform. Some discovery services combine their discovery service with their platform. Others have deliberately kept them separate.

10. Which subject discipline best describes the market for the content that your organization offers?

Science:	29.3%	(12)
Humanities:	14.6%	(6)
Social Science:	14.6%	(6)
Multidisciplinary:	14.6%	(6)
Medicine:	7.3%	(3)
Other:	12.2%	(5)
Technology:	4.9%	(2)
Engineering:	2.4%	(1)
Business:	0.0%	(0)

Other:

- a. Science and Technology (2 responses)
- b. All of the above
- c. Science, Engineering and Technology
- d. Humanities and social science.
- e. Education.

11. What type of information product is the primary source of your organization's revenue stream?

Abstracting & Indexing (A&I) Service:	36.8%	(14)
A&I plus full text:	28.9%	(11)
Full-text only:	21.1%	(8)
Other:	13.2%	(5)

Other:

- a. Our A&I is still responsible for the highest percentage of revenues, but our journal database is gaining on it, and we have other full-text as well. We also have one database that is a hybrid--an A&I with full text for about 70% of the content.
- b. Government (non-profit)
- c. Academic Library - tuition and state funding
- d. Primary is A&I, but we also have some revenue from full-text product.

- e. We are not a revenue-based organization; we work on a budget allocation, within which we must accomplish whatever we do over the course of a year.
- f. We are a non-profit organization.
- g. A&I or directory service, plus an e-commerce platform

12. How are your products sold (check all that apply)?

Subscription basis:	84.2%	(32)
Pay-per-view:	44.7%	(17)
Perpetual access:	28.9%	(11)
Other:	18.4%	(7)

Other:

- a. Our databases are site licensed by institutions, but we also offer a pay-per-view option. We are also selling some full-text book collections outright. We provide perpetual access for full text for the newly published (not historical) content added during the period of the site license.
- b. Recovery of distribution costs only
- c. No-fee service to students and faculty
- d. Print & multimedia orders, only. Online full text is free.
- e. Our products are not sold; this is not a revenue-based business.
- f. Our OPAC, vocabularies, and research databases are available free of charge on the Web.
- g. Free to the public.
- h. Selling of individual titles listed in the database
