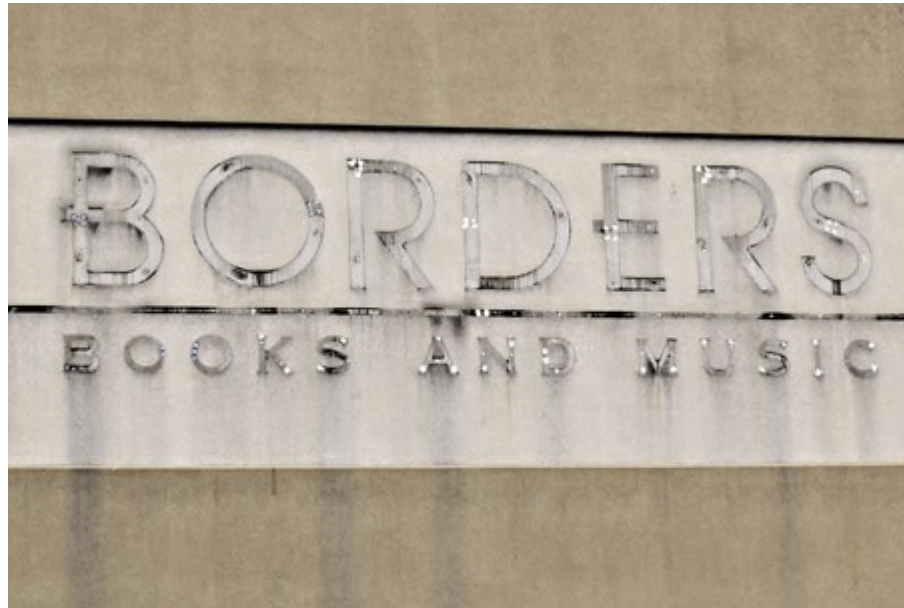


# WILEY

**Digital Books and Challenges of Library**  
**电子图书与图书馆面临的挑战**

# A changing landscape

## 日益变化的局面



- Last year in the UK more than 400 bookshops closed down, seven times more than in 2011.  
去年，英国有超过400家书店停业，这一数字是2011年的7倍。
- There are now less than 2,000 bookshops left, less than half the number of seven years ago.  
目前仅剩不到2000家书店，这一数字还不到七年前的一半。

# Print is declining

## 纸本需求正在衰退



- Physical book sales fell to £1.51bn in 2012, down from £1.59bn in 2011.

2012年实体书销售额从2011年的15.9亿英镑下降至15.1亿英镑。

# The rise of the e-book

## 电子书的崛起

- In 2012 UK e-book sales **doubled** to £261m.

2012年英国电子书销售额增长了一倍，达到两亿六千一百万英镑。



- “One in four books sold will be e-books by 2014”  
James Daunt, managing director of Waterstones.

Waterstones书店的总经理James Daunt说：“到2014年，电子书将占所售书比例的四分之一。”

# Devices

## 设备

- Mobile phones are set to overtake PCs as the most common Web access device worldwide by the end of 2013  
到2013年年底，手机将超过个人电脑成为全球最常用的网络访问设备。
- Over 80% of handsets sold in mature markets will be smartphones by 2015.  
到2015年，成熟市场上所售的手机中80%将为智能手机。
- Tablet shipments will reach around 50% of laptop shipments by 2015 .  
到2015年，平板电脑的发货量将占到笔记本电脑发货量的50%。

# Today's students have grown up in the Internet age 成长在互联网时代的当代学生



They have spent their entire lives surrounded by the toys and tools of the digital world

当代学生生活在数字化世界中，  
分分秒秒与数字设备为邻相伴。

# The Net Generation

## 网络一代

Today's students think and process information fundamentally differently from their predecessors.

当今学生的思维方式与处理信息的方式和他们前辈截然不同。

They are active learners who are:

他们是主动学习者:

- Always Connected 随时在线
- Multi-tasking 可处理多重任务
- Resourceful 随机应变
- Inquisitive 爱探究
- Demand Customization 看重个性定制化
- Independent and Interdependent 独立、互助



# Libraries aren't how we remember them

## 图书馆不再是我们记忆中的样子



Macquarie University Study Space  
麦考瑞大学（Macquarie University）学习区

Automated storage & retrieval system for print books

纸质书自动储存与检索系统





# Library Budgets

## 图书馆预算

- Wiley recently undertook a global survey of 525 institutional libraries.

Wiley最近对全球525家机构的图书馆进行了调查。

- Institutes in North America, South America, Europe and Asia Pacific Region were contacted.

所联系的这些机构位于北美、南美、欧洲及太平洋地区。

- We spoke to Senior librarians with control over and knowledge of library budgets for 2013.

Wiley与掌控和了解2013年图书馆预算的资深图书管理员们进行了对话。

# 2013 LIBRARIAN SURVEY

Based on 1515 completed responses from librarians around the world.

Survey conducted by Wiley during May 2013

## Budgets and the migration from print to digital formats

### PROFILE OF RESPONDENTS

#### Location



#### Age



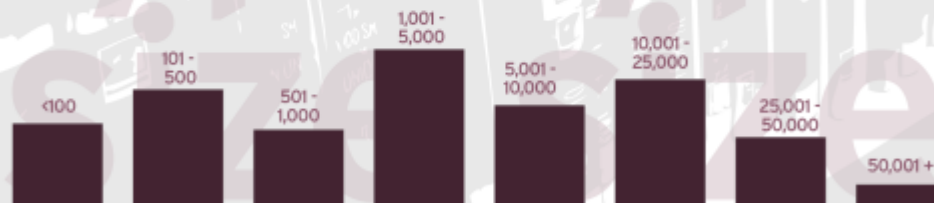
#### Experience



#### Type of institution



#### Size of institution by FTE (Full-time equivalents)

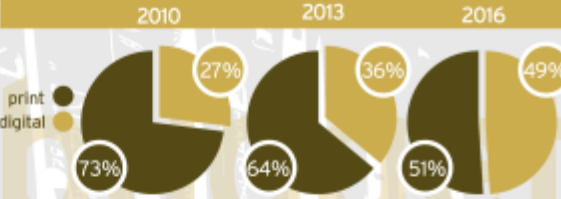


## BOOKS

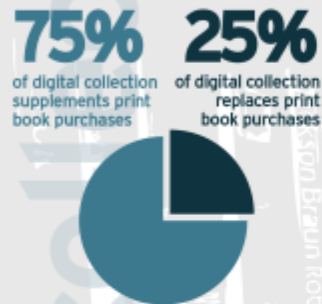
Digital share



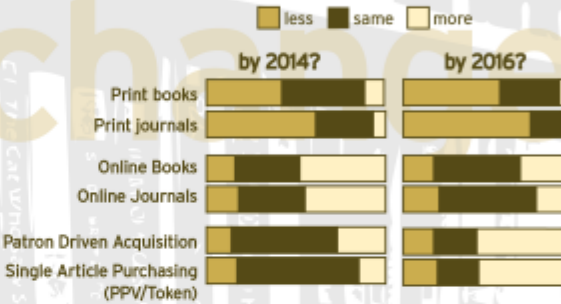
## HOW BOOK SPEND IS DIVIDED



Digital: replace or supplement?



How budgets are changing



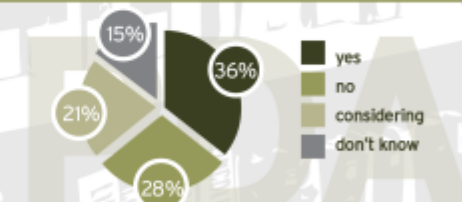
## THE FUTURE ...

... for print journal subscriptions



## PATRON DRIVEN ACQUISITION

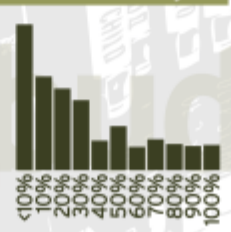
Libraries adopting PDA



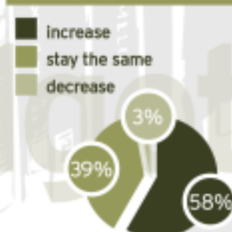
... for purchasing digital books direct from publishers



% of current budget?



Change by 2016?



# Print to digital transition

## 纸质书向电子书过渡

- Spending on print books still exceeds digital (64%/36%), but is expected to be even in three years' time.  
纸质书消费额仍高于电子书（64%比36%），但预计三年后两者将持平。
- Currently 26% of book collections are digital.  
目前26%的藏书为电子书。
- 75% of respondents state that their e-book collection supplements their equivalent print collection, while 25% state it replaces it.  
75%的受访者认为电子书是同等纸质书的补充品，而25%的人认为电子书是纸质书的替代品。
- 36% have integrated patron-driven or demand-driven acquisition models into their purchasing plans and an additional 21% are considering a pilot.  
36%的人已将用户导向或需求导向的采购模式与其采购计划整合起来，而21%的人正考虑试行此方案。

— Of those who have integrated PDA, 28% are allocating 50% or more of their digital books budget to the model. 58% expected that allocation to increase over the next 3 years (slightly less than the 61% who expected it to increase in the 2012 Survey).

在已整合用户导向采购模式的这些人中，28%的人为此模式投入50%或以上的电子书预算。58%的人预计在未来三年将增加电子书预算（略低于2012年的调查结果，当时61%的人预计增加电子书预算）。

— Regarding reference works, 60% stated they would purchase both print and online editions in the coming year (last year 67% stated they would purchase print/online editions) and 25% stated they would only purchase online editions (an increase from last year's 19%).

对于工具书，60%的人认为他们明年将购买纸质和电子图书（去年67%的人认为他们将购买纸质和电子图书），而25%的人认为他们仅购买电子图书（高于去年的19%）。

— Regarding journals, more than half of librarians say they will continue to cut print journal subscriptions, with 13% saying they will be phasing out print entirely in the next two years (up from 4% last year).

对于期刊，半数以上的图书管理员表示他们将继续减少印刷刊物的订阅读量，13%的图书馆馆长说他们将在未来两年逐步淘汰印刷刊物（高于去年的4%）。

**How do you see your digital book budget  
evolving in the next year?**

**您对明年的电子书预算走势有何看法？**

**52% are budgeting for more**

**52%的受访者电子书预算会增长**

**How do you see your digital book budget  
evolving in the next three years?  
您对未来三年内电子书预算走势  
有何看法？**

**63% will be budgeting for more  
63%受访者认为电子书预算将提高**

# The Voice of the Librarians on digital books

## 图书管理员对电子书的诉求

“We want access to the best books, and all of them”

“我们希望得到最好的图书的访问权”

“Help us integrate them into our workflow”

“帮助我们将其与我们的工作流程整合起来”

“We need quality cataloguing records”

“我们需要优质的编目记录”

“We want books in specific subject areas only”

“我们仅需要特定学科领域的书籍”

“Our students want textbooks”

“我们的学生需要教科书”

“We need better discovery tools”

“我们需要更好的检索工具”

“If the price is right, the model is fine”

“若价格合适，此模式可行”

“Offer multiple access points”

“提供多种使用权获取途径”

“Help us prove the value”

“帮助我们证明其价值”

“We want to buy just in time, not just in case”

“我们想按需购买，而不仅是以备不时之需”

“We want to receive access as soon as the title is published”

“一旦书籍出版，我们想立即获得访问许可”



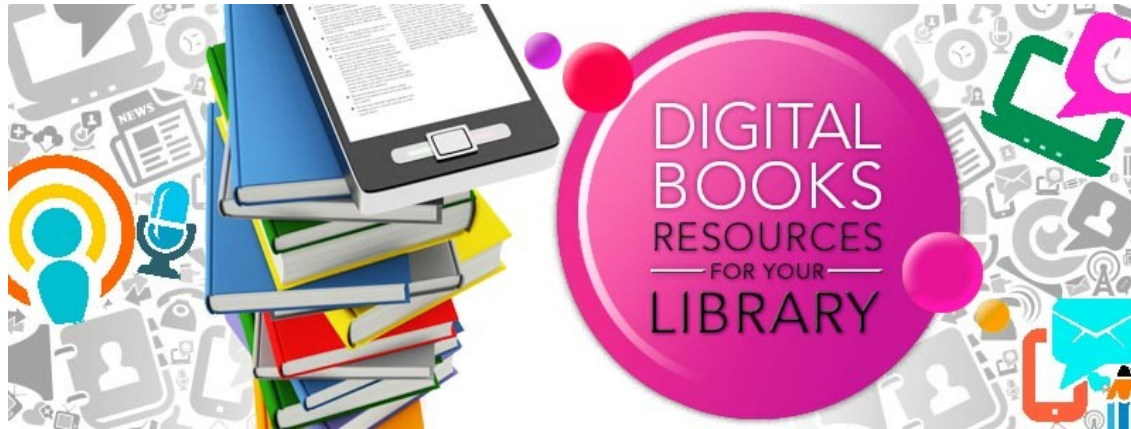




# Collections and Collection Building

## 藏书与馆藏建设

- Just In Time Vs Just In Case 及时与以防万一
- Patron Driven Acquisition 用户导向采购
- Subject specialization 学科专业化
- Access Vs Ownership 使用权与所有权



# Librarian's Role and Skillsets

## 图书管理员的角色与作用

- Data curation 资料整理
- Digital resources management, preservation and assessment 数字资源管理、保存及评估
- Subject expertise: support interdisciplinary research 学科专门知识：辅助跨学科研究
- Digital Marketing Skills 数字化营销技能



# The Librarian/Users Virtuous Circle

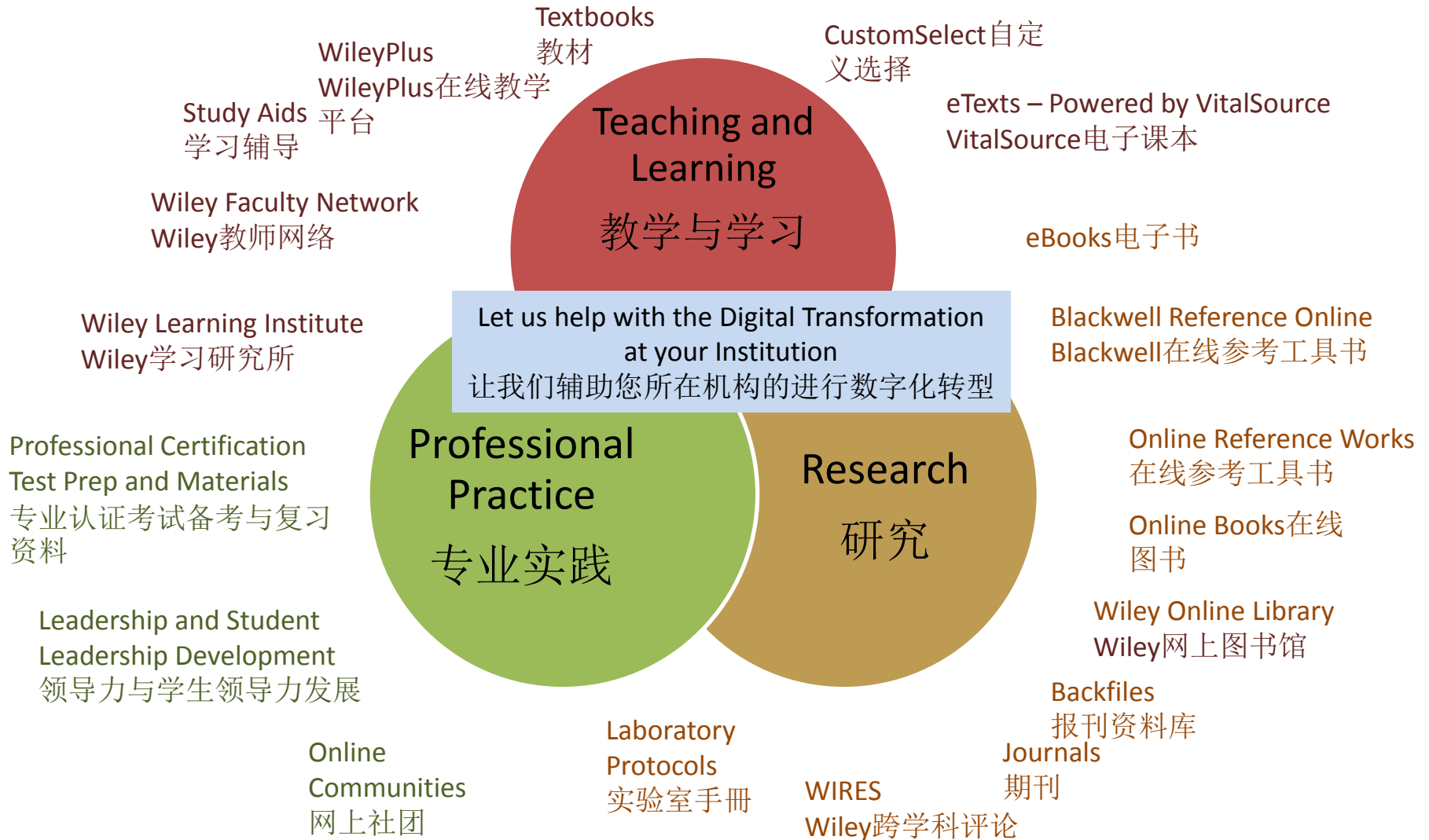
## 图书管理员与读者间的良性循环

- Communicating the value of library in advancing institutional missions and goals  
交流图书馆在推进机构完成使命和目标中的价值
- Understanding user behavior and expectation  
理解用户行为与预期
- New Services to support students to learn, teachers to teach and researchers to research, enhance life long learning  
开发辅助学生学习、教师教学及研究人员科研, 促进终身学习的新服务



# Wiley Digital Solutions

## Wiley数字化方案



# Wiley's Commitment

## Wiley承诺



# WILEY

**Thank you!**

**谢谢!**