

# Stability is not immobility\*

## Business Information Resources Survey 2006

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### Abstract

This article surveys the use of business information in UK libraries, based on two questionnaires sent to libraries/information departments in autumn 2005.

#### Summary of findings:

- stable and improving budgetary and staffing position;
- more outsourcing and offshoring;
- quality of new staff improving;
- KM increasingly recognized and mainstreamed;
- e-content improvement, service development and end-user training are top three strategic priorities; and
- market for pay-as-you-go access bottoming out.

**Keywords:** business information, information resources, surveys

(\*Prince von Metternich)

## Introduction

The Annual Business Information Resources Survey is the only regular investigation into business information use in the UK. Now in its 16th year, the Survey asks about sources of business information and issues of importance to business libraries in all sectors. In order to identify trends, some questions remain the same as in previous years. The Survey is continually evolving, however, and each year new questions are devised to reflect issues of current importance to business libraries and their staff. This year is no exception and several new areas of research have been identified.

The Survey is open to all UK business information professionals/librarians. For the first time, this year's Survey partnered with CILIP in an attempt to reach a wider selection of UK business information personnel. During October and November 2005, the questionnaire was made available on CILIP's website. The authors also posted messages on the LIS-CILIP, LIS-LINK, BUSLIB and BINN discussion lists, alerting users to the availability of the questionnaire on the CILIP website. At the same time, Sage posted copies of the questionnaire to its business and management customers. No follow-ups were sent out.

Obviously, the validity of the Survey depends entirely on the response of the information managers and librarians. Although the response rate was good, the mix of respondents did not reflect a balanced picture of business information and libraries. Rather than compromise the authoritativeness of the Survey the decision was made to postpone its analysis and publication, during which time the authors contacted further business information managers and librarians, in order to get a better representative sample.

For the first time last year, as well as distributing the standard Survey questionnaire, the authors targeted a small group of senior corporate business information professionals. Individuals within the target group were presented with a smaller questionnaire, in order to obtain in-depth views on matters of importance to the sector. As this was very successful, this year's Survey also includes feedback from this senior group.

Overall, we received 56 responses from the CILIP web-based questionnaire and Sage's mail-out. Additionally, we received 12 responses from the targeted corporate group. Of the 56 respondents who answered

the standard survey, 20 were from each of the academic and corporate sectors. The remaining 16 comprised eight from public libraries and nine from the 'Other' group which includes chambers of commerce, development agencies and the like. While the pattern of the overall response is similar to last year's, proportionately more corporate respondents answered the standard survey than last year, which was dominated by the academic sector.

It's important to remember that the questionnaire sent out to individuals in the targeted group differs from the standard questionnaire. In some cases the questions on both types of questionnaires overlap and our analysis takes into account the responses of both groups. Other questions are aimed at one or other of the two groups. In our analysis below, we have made it clear to which set of responses we are referring.

## Type of library & information service (LIS)

*What kind of library/information department do you work in?*

*If corporate, please indicate which industry sector*

The pattern of respondents in this year's Survey is very similar to last year's (see Figure 1). This is helpful as it allows meaningful comparisons to be made year on year. Some 29 companies responded along with 22 universities, eight public libraries and nine others. The latter group included a national library, chambers of commerce and development agencies. Of the corporate

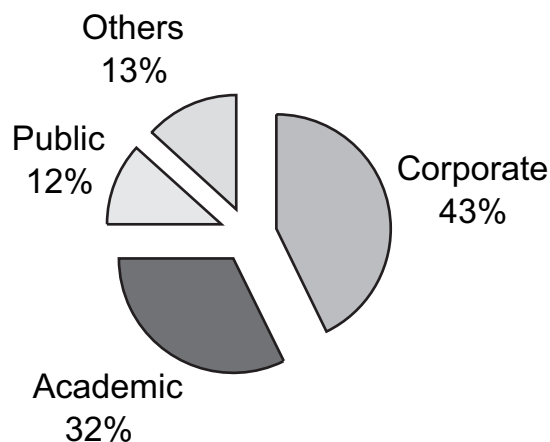


Figure 1 – Respondents by sector (n = 68)

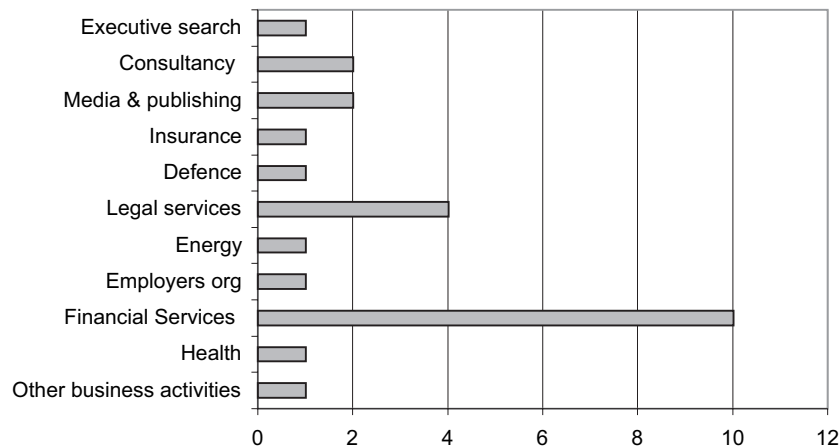


Figure 2 – Corporate respondents by sector (n = 25)

group, 12 were the subject of the in-depth targeted survey of senior managers which has given us a richer and, in some areas of enquiry, a rather more detailed view of corporate business information practice.

As Figure 2 shows, once more, the corporate respondents are dominated by City institutions – namely those companies from the financial and legal sectors.

## Budgets

*What is your library/information department's annual budget for business information resources? By what percentage has this changed from the previous year?*

Respondents were asked to indicate their annual expenditure on business information from a series of eight bands ranging from below £5000 to over £1 million. Overall, the purchasing power of this year's respondents is significantly lower than in last year's Survey. The median average budget is £100,000 compared with £150,000 in 2004/5. Nine respondents had budgets of over £1 million and these were mainly the blue chip companies included in the in-depth, selective part of this year's sample (see Figure 3).

This Survey reports a pretty stable information resources budgetary climate for our respondents. Some 53 per cent of them have 'standstill' budgets whereas 31 per cent have enjoyed increases, with only 16 per cent suffering reductions.

The commercial climate in 2005/6 appears competitive but not overtly hostile in our respondents'

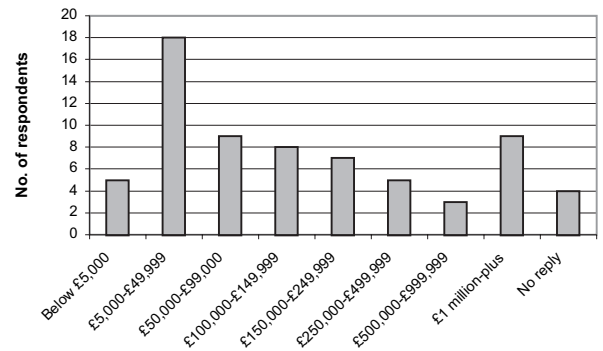


Figure 3 – Annual budgets for business information (n = 68)

business sectors. Universities enjoyed continued growth in student numbers for another year, although the prospects for 2006/7 and beyond are uncertain as a result of the introduction of increased student fees. The position of our public library business information services does not look so rosy, with some budget reductions reported.

## The print–electronic budget equation

*Approximately what percentage of your budget for business information resources is spent on print and electronic sources?*

In recent years the standard Survey has charted the inevitable and inexorable increase in the proportion of business information resources budgets being

expended on electronic resources, rather than print materials. There are predictable differences between our responding library and information services in the various sectors. Although the general trajectory of all respondents is to increase the proportion of their budgets on eResources, corporate libraries are moving faster towards, more or less, a totally virtual environment. The great majority of our corporate respondents are committing upwards of 80 per cent of their budgets on electronic material. Some have quoted figures as high as 95 per cent and 98 per cent.

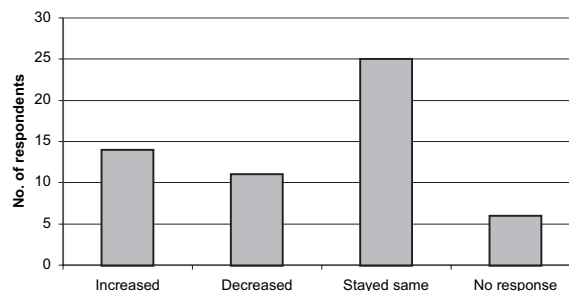
Our university respondents are still reliant, in part, on the provision of significant numbers of business books – textbooks and research monographs – and for the management and development of so called ‘legacy collections’ of printed materials. Printed journal collections are being seriously challenged by electronic versions but the period of transition is not an easy one. This is due to the enduring uncertainties over long-term archiving arrangements for eJournals and to the continuation of ‘bundled deals’ of print/electronic titles from major publishers, which many universities have found difficult to resist. Unless and until library managers are convinced that long-term access to eJournals can be guaranteed, then they are unwilling to make the jump entirely away from print. Another issue to be highlighted once again this year is the attempts by our respondents to integrate eResources, cross searchable, in a coherent way.

The provision of an excellent collection of quality electronic books, with an easy and effective interface, appears as elusive as ever for our academic respondents. For the fourth year running this Survey has identified business eBooks as a required area of development, yet university libraries appear little closer to acceptable solutions.

## Staffing

*Compared with the number of library/information staff employed in 2003, has this now (September 2005) increased, decreased or stayed the same?*

Last year’s Survey reported a significant and rather worrying ‘churn’ rate in the staffing numbers in our respondents’ business libraries and information services. Approximately 37 per cent reported an increase, 32 per cent a decrease and 31 per cent ‘no change’. Corporate libraries were particularly



**Figure 4 – Changes in number of LIS staff between 2003–2005 (n = 56)**

unstable, with 41 per cent reporting a decrease in staffing numbers between 2002 and 2004.

This year’s picture suggests much more stability. Overall, 28 per cent of respondents report an increase in staff numbers, 22 per cent a decrease and 50 per cent say that there’s been no change between 2003 and 2005 (see Figure 4). Corporate libraries show no greater trend in decreased numbers than the other sectors. This may be because the position on outsourcing has also stabilized – see below.

Some respondents identified the wish to increase staff headcount as one of their key strategic priorities.

### *Comments on staffing numbers*

We probed the particular consequences of changes in staffing numbers with the in-depth sample of 12 senior information managers. The comments below illustrate very clearly the process of adaptation that these LIS departments are going through.

- Staff numbers have stayed the same. We’ve tried to work smarter. (Corporate)
- Same numbers – this has put more pressure on existing staff as use of service has grown. Have utilized placement students as a work-around to ensure quality of service is maintained (Others category).
- 40 per cent reduction. Have moved to a primarily electronic service but still too early to judge implications on service delivery. (Academic)
- Decreased staffing on service delivery: one full-time post (35 hpw) replaced by part-timer (20 hpw). Has meant that we’re more stretched as a result. (Corporate)

- Static staff numbers have led us to develop a more personalized and focused approach to service delivery. (Academic)
- Slight increase in staff headcount has enabled us to cope with increased business levels and also to focus efforts on more value-added activities and interventions. This has been, *inter alia*, a greater emphasis on systems design, knowledge advertising and end-user training. (Corporate)
- Static staff numbers means that at times it has been difficult to meet deadlines and we have had to outsource some work. (Corporate)
- No change in staff numbers has affected info services delivery by us preferring electronic over hard copy and delivering resources to the desktop. (Corporate)
- Increased staffing has improved service delivery. (Corporate)

## Outsourced information and research functions

*Has your organization outsourced any of its information services? If 'yes' has this involved contractors (a) in the UK, or (b) overseas?*

'Outsourcing' and 'off-shoring' appeared as major strategic trends in last year's Survey.

According to Wikipedia, 'Outsourcing (or contracting out) is often defined as the delegation of non-core operations or jobs from internal production within a business to an external entity (such as a subcontractor) that specializes in that operation. Outsourcing is a business decision that is often made to lower costs or focus on core competences. A related term, offshoring, means transferring work to another country, typically overseas. Offshoring is similar to outsourcing when companies hire overseas subcontractors, but differs when companies transfer work to the same company in another country.'

Libraries have outsourced some basic functions for generations. Getting book suppliers to pre-process stock can be interpreted as a very basic transfer of activity from the library to a commercial partner. This year's Survey asked specifically about outsourcing for

the first time (see Figure 5). The response was interesting.

Of the 18 respondents who have outsourced services, five have sent this work overseas. The comments suggest that outsourcing arrangements have had mixed success:

- I have outsourced the press cuttings service. The standard has gone down considerably. (Employers' organization)
- We've used a company in India for some editorial work for a one-off exercise but I'm not aware of anything on an ongoing basis. (Corporate)
- We investigated the possibility of outsourcing some bulk repetitive company research and also some highly detailed sector analysis a couple of years ago but did not proceed. We do outsource admin tasks such as loose-leafing. (Corporate)
- We have only outsourced a few secondary research information requests to date and would hope for this to be reduced to zero in the future. (Corporate)
- No [outsourcing]. The organization is too small and the information too sensitive to consider this. (Corporate)
- We have offshored back office services to India. This has been successful. It takes a considerable amount of time to manage the relationship with the remote services staff. (Corporate)

A concise description of why offshoring is happening in a number of industries has been provided by Daniel Pink:

Outsourcing to Asia is over-hyped in the short term, but under-hyped in the long term. We're not all going to lose our jobs tomorrow. (The total number of jobs lost to offshoring so far represents less than 1 per cent of the US labour force.) But as the cost of communicating with the other side of the globe falls essentially to zero,

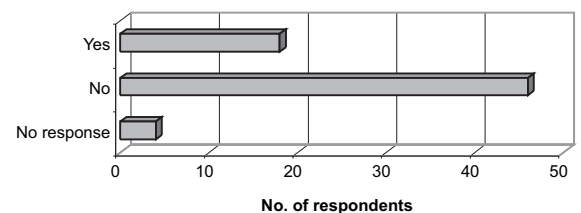


Figure 5 – Outsourcing information services

as India becomes (by 2010) the country with the most English speakers in the world, and as developing nations continue to mint millions of extremely capable knowledge workers, the professional lives of people in the West will change dramatically. If number crunching, chart reading, and code writing can be done for a lot less overseas and delivered to clients instantly via fibre-optic cable, that's where the work will go. But these gusts of comparative advantage are blowing away only certain kinds of white-collar jobs – those that can be reduced to a set of rules, routines, and instructions. [1]

Offshoring is, of course, a very political issue. When the news that some civil servants' jobs in the Department of Work and Pensions might move was leaked to the press, in January 2006, it was immediately followed by a strenuous denial. 'We have not moved any of the department's jobs offshore and we have absolutely no intention of doing so', was the official response. Some companies such as NatWest make their domestic bases for their credit card and banking services a core element of their advertising. But for many others the opportunity to drive out operational costs is simply too compelling. A recent review of IT offshoring highlights the rush of European and US companies to the subcontinent and Indian IT service suppliers growing in stature [2].

The global companies publicly known to have used outsourcing for their information and research services include players such as Citibank, Deutsche Bank, Lehman Brothers, JP Morgan, Goldman Sachs, Morgan Stanley, Bear Stearns & Bank of America. There appears to be mixed practice between a contracting model, where an agency in a developing country is employed, or an employee model where local employees are taken on the payroll of the client company [3].

Practical experience is mixed, and accounts of success and failure are often filtered through the corporate view of the company doing the offshoring. Reading between the lines of the responses to this Survey and in private conversations with senior information professionals responsible for managing these relationships, we get an impression some are far less convinced about the balance of advantage in such arrangements than their corporate leaders.

Close to the information industry in specific terms is Richard Gaston [4] who gives an expert and balanced inside view of the pros and cons of offshoring. His concluding question is 'Can [offshored] researchers do in-depth or value added research as well as their London-based counterparts?' Given more exposure to working directly for banking clients, will the cultural

barriers that sometimes get in the way of a true understanding of a research issue be removed?

'If this is the case, then preserving a future for on-shore researchers will depend on our own ability to market our services successfully and prove the business case for our proximity. [This will give us an] advantage . . . in understanding both end-users and their clients.'

As we said in the last Survey report, the more an information/research service is embedded in the knowledge/information exchange fabric of the workplace then the harder it is to outsource it to an external contractor or offshore it to another continent.

*When recruiting new staff what are your observations of the quality of the candidates, both professional and support, that you consider?*

One of the most heartening findings in this year's Survey is a step change in the attitudes of business library/information managers to the quality of the staff they recruit. Goodness knows there's been enough criticism in recent years about the effectiveness of universities in producing LIS graduates of sufficient quality for professional practice. Getting a suitable balance in an overcrowded curriculum for traditional LIS skills, appropriate and powerful IT skills in areas such as web development and resource discovery, and a grounding in basic management studies is a very hard task.

The demand from young people for undergraduate LIS programmes has pretty much collapsed so the great majority of new entrants to the professional ranks have been through postgraduate/Masters level courses. Whether this is leading to more able and motivated new professionals is a matter of conjecture. But in respect of this year's Survey respondents, the following comments are typical:

- mostly excellent (Chamber of Commerce);
- have successfully recruited excellent candidates (Academic);
- there is a significant increase in the quality of the candidates, particularly by way of competency (Corporate); and
- quality is generally fine, especially with support staff. First professionals still seem to have quite a haphazard experience of relevant work and there are big differences between schools in terms of core competencies (Academic).

Sometimes the generally favourable judgements are leavened by comments about what LIS managers have to do in personal development terms, to enable the newcomers to be productive within the organization.

- An awareness of what we offer and evidence of research done are the most desirable elements. This is reasonably apparent but for an information profession not as solid as it should be (Corporate).
- The quality of candidates is increasing in communication and presentation skills. However, there is still no great increase in the level of IT skills that library graduates possess (Academic).
- Most candidates need specialist training once they're appointed. Few have existing knowledge of specialist business information services (Public).
- Lack of business information knowledge/research skills and opportunities in the sector. We need to train staff up to use business resources (Government).
- There are a few good quality candidates in a relatively small pool to choose from (Corporate).

Predictably, some respondents are still profoundly disappointed with their new recruits:

- Still much emphasis on traditional library skills. Image of profession tends to attract people who I would see as unsuitable for business information work. (National Library)
- Unpolished, lack of understanding of the corporate environment, too timid. (Corporate)
- As a commercial organization we find that the pool of qualified information staff with commercial experience in the North West is small and that, in many cases, the types of individuals we would employ do not have an information qualification, but have worked within a research function in an accountancy/corporate finance firm gaining on-the-job experience. (Corporate)

Some respondents clearly stated their needs when recruiting staff:

- IT qualifications. Knowledge of business. Ability to work under own initiative. Keen and eager. Problem solvers. (Government)

- Flexible and adaptable to change. Professional experience in relevant posts. Friendly and customer focused. Competent in new technology. (Public)
- Experience, enthusiasm, team working, seeing the bigger picture. (Academic)
- Information organization skills i.e. cataloguing, classification, taxonomy developments. (Academic)

## Knowledge management

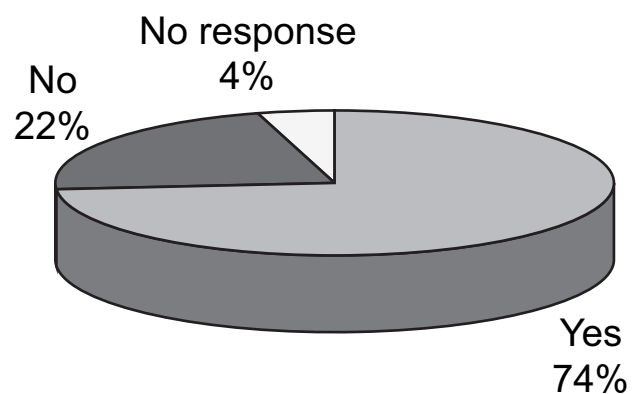
*Does your organization recognize the concept of knowledge management? If so, has it increased in importance, decreased or stayed the same?*

In the last four years there has been a sea change in the recognition of knowledge management within organizations. It may still be a rather woolly concept but, as Figure 6 shows, there's little doubt that in one form or another KM has penetrated all but the most traditional organizations that have business information services.

Recognition is across all sectors, embracing many academic institutions as well as, predictably, companies and government bodies.

Some of the specific comments are as follows:

- [KM has had a perceptible impact on organization] although in its early stages. We are adopting a knowledge sharing approach focusing on identifying internally produced sources which have inherent value and can be re-used. We are moving towards



**Figure 6 – Recognition of KM within organizations (n = 68)**

managing these resources centrally, rather than in teams, to improve on efficiency and delivering value for money. A side benefit is to reduce both electronic and physical storage. (Corporate)

- Knowledge management – or know how – is an integral part of what our department does (along with legal research and business information). As a knowledge organization, there is a vast emphasis on, and substantial investment in, maintaining and developing systems, processes and cultures that support the effective, efficient and profitable exploitation of our knowledge resources. (Corporate)
- There are a number of information sharing initiatives across the Group, for example, on Group Sales. Another example would be combining knowledge across different parts of the Group to create a marketing suppliers database. (Corporate)

Some universities struggle with KM due as much as anything to a theoretical debate about the nature of knowledge and whether it can be managed at all. Other universities are coming at it from another rather more prosaic direction as reflected by this comment:

- KM will be developed as part of the University's response to records management implementation. (Academic)

Predictably, public libraries (and local government) have the most difficulty with this concept and KM has made fewer inroads here than in the other sectors included in the Survey.

In looking at the trajectory of KM in organizations, it's notable that the answer to the question about whether KM had increased or decreased in importance in the last two years was overwhelmingly positive. Approximately 60 per cent of the respondents to this question said that it had increased in importance, 40 per cent said that it had remained at the same level and no one said that it had decreased.

Knowledge management has become part of the mainstream in many organizations, even if there is still disagreement and ambiguity about its specific role and contribution.

## Knowledge management software

*Does your organization have any specific KM software (such as Autonomy, Bright Planet) to capture and disseminate explicit and implicit organizational knowledge? If so, what product(s)?*

If there is much agreement about KM's importance, there's much less commonality about the way specific technical systems might be deployed to assist in its implementation. Of the 50 respondents who said that KM was recognized within their organizations, less than 20 per cent (eight responses) claimed that particular software was in use. The proprietary products quoted by the eight included: Autonomy, Hummingbird (2 installations), InterAction and SharePoint. Internally designed systems, including a couple using Microsoft Access, were also mentioned. It has become a cliché to say that KM is little to do with the technology but this appears particularly true among the respondents to this Survey.

Some of the specific comments are illuminating:

- A lot of emphasis on capturing internal knowledge, via InterAction software and making internal data more accessible. Also use various portals. (Corporate)
- We do not have any software that would be thought of as KM software in that sense. Our intranet uses Lotus Notes (although end-users would not realize that), and was adapted especially for us with a publishing/content management element. (Corporate)
- We tried specialized KM software but it added little. Does not mirror our culture. (Academic)
- No, we do not use KM software. We did try Autonomy and I was responsible for proving/disproving its value to us. I disproved it as the manner in which we work cannot be confined to a pre-defined universe. As researchers we need freedom to roam and look for wider data sources outside the established ones. (Corporate)
- No KM software products. We've built KM resources in house and delivered them via our intranet. (Corporate)

## Intranets

*Does your library/information department contribute to your parent organization's intranet? If yes, please identify the types of information you provide.*

Of all the issues raised in this year's Survey, perhaps the greatest amount of consensus concerns organizational intranets. Some 90 per cent of the 55 respondents to this question said that their LIS department contributed to the parent organization's intranet.

When prompted by the question about the nature of the information being added by the LIS department to the organizations' intranets, six main areas of information were identified as in Figure 7. Descriptions of library and information services and resources were being contributed by all respondents to this part of the questionnaire, closely followed by news services and access to bibliographic discovery tools such as bibliographic databases. About 50 per cent of respondents were using the intranet as a vehicle for online training materials.

### The effect of end-user access

*What effect is increased end-user electronic access having on your library/information department?*

We've asked this question consistently over many years of the Survey. The results do vary from year to year and this may simply be down to the different sample each time. However, under this heading in last year's Survey, we pointed out that for the first time ever, none of the 40 or so respondents had identified

decreasing demands on the library/information service as a consequence of greater end-user electronic access.

While this year's sample is not quite of that mind, there's certainly no doubt that by far the majority of respondents identify 'changing the nature of library/information services' as the overwhelming outcome of end-user access. Of the 51 people who responded to this question, 76 per cent believed that this was so. Approximately 12 per cent said that end-user access to eResources had increased the demands on their service while 8 per cent believed that it had reduced demands on them.

*Does your library/information department train end-users to use desktop electronic services?*

Over the last five or so years of this Survey, the proportion of business information departments undertaking end-user training has been gradually rising. Two years ago 66 per cent of respondents undertook training. Last year the figure had increased to 73 per cent. This year it's crept up further to 76 per cent.

While universities routinely have been running training for students and staff for many years, it's become noticeable how many corporate information departments now undertake this activity. In some companies they realize that they should do more:

- We do not spend enough time on training. (Corporate)
- And that different user constituencies require varied approaches:
- It depends a lot on the information literacy of the users which varies dramatically. (Corporate)

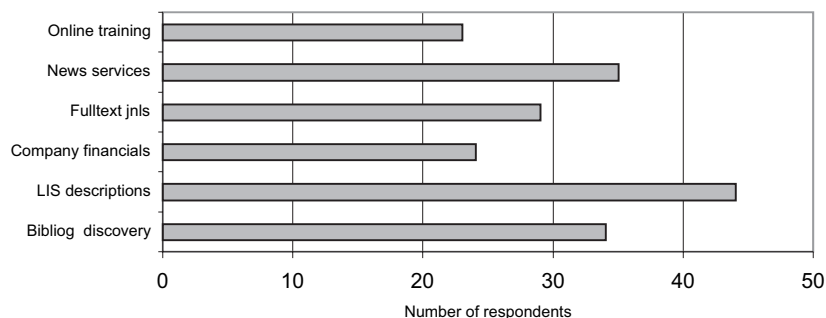


Figure 7 – Intranet content from LIS depts (n = 44)

Some of our corporate respondents highlighted training as one of their strategic priorities in the next two years. And there are a number of mentions of 'information literacy' in all sectors:

- There will be an increased emphasis on information literacy rather than training specific to certain eResources. (Academic)

## Aggregators

*Which of these host/aggregator services are heavily used in your library/information department?*

**Table 1**

Aggregator service	Number of respondents
LexisNexis	27 (48%)
Dialog/DataStar	19 (34%)
EBSCO	19 (34%)
Thomson Financial	16 (28%)
Factiva	14 (25%)
Profound	13 (23%)
Gale (InfoTrac/GaleNet)	7 (12%)
Alacra	3 (5%)
Others: AMADEUS; BvDEP; Delphion; FAME (2); Emerald; ProQuest; Reuters; STN; ZEPHYR	

Each year, the results demonstrate the dominance of The Thomson Corporation. This year is no exception and the standard Survey results show that nearly 86 per cent of respondents' organizations subscribe to or access a Thomson product – Dialog, DataStar, Profound (now known as Market Research on Thomson Business Intelligence) or Thomson Financial.

However, while this year's results show that usage of Profound and Thomson Financial is up, that of Dialog has declined from 60 per cent of users in last year's Survey to 34 per cent in this year's. Last year, Dialog and LexisNexis both accounted for 60 per cent and while LexisNexis usage also shows a drop – down to 48 per cent this year – its slip is not nearly as marked as that of Dialog.

Factiva usage also shows a downward trend in this year's results. Last year, a third of organizations claimed to be heavy users of Factiva, compared to a quarter of users this year. This is surprising given that in 2005, *Electronic Information Report's* third quarter

*Current Awareness News & Research Online Subscriber Survey (EIR no 43, 28 November 2005)*, ranked Factiva as top, amid claims that the company had taken market share away from LexisNexis, Dialog and OneSource. Factiva is testing a new search platform that delivers results in a graphical format for interactive navigation. This new functionality will gradually be integrated into existing Factiva products and it will be interesting to monitor its effects on subscriber numbers over the next 12 months.

The number of organizations using Alacra shows only a tiny decrease. Once again, it will be interesting to monitor numbers over the next 12 months. Alacra's pay-as-you-go service, AlacraStore, was only launched in October 2005. Next year's Survey results will demonstrate if this new way of accessing Alacra content has had any impact on the number of organizations who make heavy use of the aggregator.

## Pay-as-you-go access

*What percentage of your expenditure on electronic products is accounted for by 'pay per view', as opposed to pre-paid, unlimited subscriptions?*

Pay-as-you-go access offers an attractive alternative to pre-paid/subscription-based access. It's particularly useful for organizations that only require occasional access to a product or where usage of a product may be difficult to quantify. A further advantage is that prices are transparent and users can see immediately how much each document will cost to download.

The downside of pay-as-you-go is that it often requires the use of an organization's credit card which may not be generally available. By its very nature, it's also difficult to budget for *ad hoc* access. Additionally, pay-as-you-go can sometimes be an expensive way of obtaining information. Downloading the full text of some reports can be cheaper than purchasing its constituent parts individually. Nevertheless, pay-as-you-go is now an established route to obtaining certain types of data by many organizations.

This year's standard Survey asked respondents to calculate their percentage spend on pay-as-you-go access. The results show an upward trend in almost all groups of users. The only group of users for which usage has not grown is the 'Others' group, which shows a 10 per cent decline over last year – 35 per cent down

to 25 per cent. Unsurprisingly, academic institutions are not big users of pay-as-you-go products. However, 20 per cent of this year's academic respondents claim to be users compared with only 7 per cent last year. Of this year's academic respondents, none allocated more than 5 per cent of their budget to pay-as-you-go access.

Pay-as-you-go access has always been relatively popular with public libraries and this year's results show an increase of 24 per cent. Approximately 75 per cent of public libraries use this method of accessing data, compared with 51 per cent in last year's Survey. The overall percentage of budget allocated to pay-as-you-go access, by public libraries, is relatively low with none spending more than 15 per cent.

As previous Surveys have shown, corporate organizations are by far the largest users of pay-as-you-go services. This year's results tell us that approximately 85 per cent of corporate respondents use pay-as-you-go services, which represents a tiny increase on last year (84 per cent). Some corporate libraries and information departments are big users, with some reporting that 75 per cent or 90 per cent of their budgets are allocated to these services. One corporate library reported 100 per cent budget allocation. However, this lack of growth among corporate users over the last 12 months suggests that maybe the market for pay-as-you-go services has flattened out.

### *Which pay-per-view products do you use?*

The Survey also asked which pay-per-view products were used. Dialog is the most popular and is accessed by 23 per cent of respondents, followed by ICC (9 per cent) and then by Companies House, DataStar, D&B and Profound (all 7 per cent).

Dialog (13)	Experian
ICC (5)	Factiva
Companies House	Ingenta
Direct (4)	Land Registry
DataStar (4)	(Mailing lists)
D&B (4)	Multex
Profound (4)	OCLC FirstSearch
LexisNexis (3)	ORT
Bureau van Dijk EP (2)	Questel.Orbit
Perfect Information (2)	RM Online
Alacra	ShareWorld
Autex	STN
Computershare	Thomson Financial
Equifax Business	
Marketing Decisions CD	

The long list of products accessed by respondents indicates the large number of aggregators, vendors and publishers who are increasingly offering pay-as-you-go access to their content.

## Business news services

### *Which are your most frequently accessed business news services?*

**Table 2**

News services	Respondents
LexisNexis	21 (37%)
Factiva	12 (21%)
FT.com	9 (16%)
Dialog NewsRoom	7 (12%)
Others: ABI/INFORM; EGi; NewsBank; NewsEdge; Westlaw UK; hard copy newspapers and outsourced press cuttings services	

The top three most heavily used, subscription-based business news services replicate last year's results. Within the group of respondents answering the standard questionnaire, the favourite news service is LexisNexis, followed by Factiva and FT.com. Overall, this year's results show a downward trend in the percentage of users for LexisNexis and Factiva, and a slight upward trend for FT.com.

## Company financial services

### *Which are your most frequently accessed company financial sources?*

**Table 3**

Company financial services	Respondents
Bureau van Dijk	31 (55%)
Companies House	22 (39%)
D&B	16 (28%)
Thomson Financial	11 (20%)
ICC (Juniper)	9 (16%)
OneSource Business Browser	6 (10%)
Hemscott	3 (5%)
Hoover's	2 (3%)
Others: Experian (3); CompuStat; FT.com; Compass	

For the third year running, Bureau van Dijk Electronic Publishing (BvDEP) is the most favoured provider of subscription-based company financial data, with more than 55 per cent of respondents of the standard Survey claiming to use BvDEP products. The company also came top last year, which we attributed to the proportionately higher number of academic respondents and the favourable deals made available to these institutions by BvDEP. However, the number of academic institutions responding to this year's standard Survey mirrors exactly the number of corporate respondents, so it's fair to say that BvDEP is widely used by both types of organization. BvDEP products are also popular with public libraries. This year's results show that 75 per cent of public libraries subscribe to at least one BvDEP product. This is due to the company's favourable deals for public libraries and other not-for-profit organizations.

Compared with last year's results Companies House and D&B have swapped positions, with Companies House being ranked second this year, compared with third last year, and D&B moving to third place this year from last year's second position. Data from this year's Survey also shows that Companies House has increased its percentage usage by 13 per cent over last year, while D&B has dropped by 5 per cent.

## Original documents (company filings)

*Which service(s) do you use for obtaining original company documents (filings)?*

**Table 4**

Company documents services	Respondents
Companies House	34 (61%)
Thomson Financial	13 (23%)
ICC (Juniper XD)	6 (11%)
Perfect Information	3 (5%)

Many business procedures require access to original documents – financial analysis, litigation, auditing, due diligence, underwriting and research. For the first time, this year's standard Survey asked which services respondents use to access original company documents.

The overwhelming winner is Companies House. Approximately 61 per cent of respondents use Com-

panies House Direct for accessing UK and Ireland company documents. The agency is popular because it offers flexible access options, ranging from subscription to pay-as-you-go services. ICC's Juniper XD service, which also provides access to UK and Ireland company documents, accounts for 11 per cent of usage. Thomson Financial and Perfect Information's Perfect Filings provide access to international documents, and account for 23 per cent and 5 per cent of usage respectively.

Unsurprisingly, most of the demand for original documents comes from the corporate sector and, of these, most are mainly financial institutions. A couple of public library respondents claim that their customers require original filings, but only one of the academic respondents reported any demand for this type of document.

## Market research services

*Which are your most frequently accessed market research sites?*

**Table 5**

Market research services	Respondents
Mintel	27 (48%)
MarketLine (Datamonitor)	25 (45%)
Key Note	23 (41%)
Euromonitor	22 (39%)
Profound (Market Research on Thomson Business Intelligence)	12 (21%)
MarketResearch.com	6 (11%)
MarkIntel (Thomson Financial)	4 (7%)
Others: AMA (2); Business Insights; Euromonitor on OneSource Business Browser; Snapshots	

The standard Survey asked 'Which are your most frequently accessed market research services?' The results show that market research services are used by all the different types of respondent organizations. For the first time, Mintel has been ranked the most-used source, with 48 per cent of respondents claiming to access it regularly. Last year, Mintel was ranked fourth (40%), lagging behind Datamonitor, Euromonitor and Key Note. However, last year's results did show that Mintel was moving up the rankings, reporting an increase of 16 per cent from the previous year.

The largest group of Mintel users are organizations that go to make up the 'Others' group, followed by the

academic group. Of the respondents from the 'Others' group who answered this question, 87 per cent claim that their organizations are heavy users of Mintel, followed by 55 per cent of the academic group, 37 per cent of the public library group, and 30 per cent of corporate group. Clearly, Mintel offers generous deals to not-for-profit organizations and public libraries, as well as having an agreement with JISC/CHEST for academic institutions.

Datamonitor has slipped from last year's top position to second place this year; Key Note has maintained its third position, while Euromonitor has slipped from second to fourth position.

## Country and economic sources

*Which are your most frequently used sources of 'country data' (including economic surveys, political risk analysis, etc.)?*

**Table 6**

Country data services	Respondents
Economist Intelligence Unit	28 (50%)
World Markets Research Centre (WMRC)	9 (16%)
Business Monitor International	3 (5%)
Political Risk Services	–
Others: OECD (3); Free sources on the web (2); CIA Handbook; Datamonitor; Europa Yearbook; GMID; IMF; Snapshots	

When it comes to country data services, an analysis of the results of this year's standard Survey replicates the rankings of last year. Once again, the Economist Intelligence Unit is ranked top, followed by World Markets Research Centre and Business Monitor International. In third equal place are OECD sources.

Country data can be expensive to purchase and a JISC/CHEST agreement with the Economist Intelligence Unit goes some way to explaining its popularity among the academic institutions. The company also offers flexible options for companies and other organizations to purchase its data. The EIU Store provides access to individual reports, and articles which can be purchased on a pay-per-view basis. Coupled with the reputation of its data and the recognition of the EIU brand, these flexible access options

explain why the Economist Intelligence Unit is so popular.

## Blogging

*Do you or your staff use business/industry/or library/information blogs (i.e. web sites that contain edited entries about a particular topic)?*

*If Yes, please give details.*

*Does your library/information department publish a blog?*

Leading blog website *Technorati* has issued recent statistics documenting the explosive growth in weblogs. The latest count is 27 million (February 2006), up from 20 million in October 2005, and roughly doubling every six months. A lot of these are transitory and only 10 per cent of authors manage to make at least weekly postings.

Blogging commentator John Blossom said, 'World-wide we'd estimate that there are about 1.5 million librarians in public and private practices managing their institutions' collections. Assuming that about half of the weekly weblog posters are keeping tabs on content found on the web that means that already webloggers in gross total about equal today's total professionally trained corps of information professionals. Wait a year and there will be more than double that number, from which we could more safely assume that we'll have about 1.5 million people who do a pretty good job of pointing people to content on the web. In another year we may have that same number who are pretty trusted authorities of specific topics who have found reasonably strong audiences for their content [referral] skills.' [5]

In the US LIS community, many librarians are already enthusiasts for blogging from the perspective of professionals trying to communicate with peers and patrons. This is much less marked in the UK and our Survey shows, in particular, how little blogs are valued by university business librarians.

For the first time, the standard Survey asked, 'Do you or your staff use business/industry/or library/information blogs (i.e. websites that contain edited entries about a particular topic)? If Yes, please give details.'

Overall, only 23 per cent of respondents use blogs and, of these, 75 per cent are from the corporate sector. The most popular blogs used by respondents are:

- AlacraBlog (2)
- FreePint
- Peter Scott's Library Blog
- Phil Bradley's Blog
- Search Engine Watch Blog
- Virtual BookShelf

The Survey also asked, 'Does your library/information department publish a blog?' The resounding answer was 'No' – not one of our respondents' libraries/information departments publishes a blog.

Blossom goes on to say, 'Few librarians have really begun to consider the full impact of both the breadth and focus of weblog content that's being created in and beyond their user base and how that content will affect both their archiving requirements and their ability to use webloggers as key recommenders of content and as topic experts who can support users.'

'Rethinking what is a 'local collection' is very necessary in an age in which less and less content starts out in book and journal format and more in raw forms such as weblogs. In the meantime a growing army of webloggers are performing this function to some degree already themselves, cataloguing the web from very personal and oftentimes local perspectives. These people are creating their own 'sweet science' of content organization that's influencing more and more readers and writers worldwide.' [5]

## Support services: account managers and help desks

*How do you generally rate the support offered by the account managers of business information suppliers?*

For the first time, last year's Survey probed customer support arrangements provided by business information suppliers. Most organizations will have access to account managers nominated by their major suppliers and the LIS staff, and sometimes end-users themselves will turn to helpdesks when they have queries or are looking for advice on using these products.

Account managers are the main link between the customer organization and the business information supplier. Most information managers will want their account manager to be accessible, responsive and not given to turning every meeting into a selling opportunity. They will be the conduits through which contracts are discussed and resolved, licensing issues sorted out and training organized.

Our respondents this year were rather more impressed by the quality of support they receive from these people than last year (Figure 8). We asked them to rate the support they receive on a scale of 1 to 5.

The median score worked out as 3.6 compared with 3.2 last year. This is, of course, a very crude measure as different companies will perform in varied ways as one of our respondents points out:

- Very variable. The bigger the supplier the worse it gets. Thomson & Reuters are the worst. (Corporate)

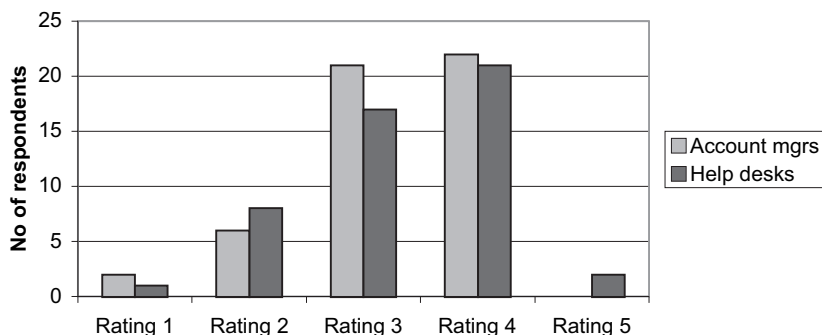


Figure 8 – Rating of account managers and help desks

- Some obviously are better than others. I would rate particular companies as '0', whereas others as '4'. (Government)

Despite overall satisfaction, there is a range of views about the usefulness of account managers:

- They change too often to be effective. Impossible to build up client relationship. (Chamber of Commerce)

*How satisfied are you with the general level of service you receive from helpdesks (time taken to reply, authority of responses, etc)?*

For the second year running, the standard Survey also sought to obtain opinion on how highly or otherwise respondents rate the level of customer service and support from helpdesks. Respondents were provided with a five-point scale ranging from Poor to Excellent.

As well as being fairly happy with their account managers, clients also seem to be quite satisfied with their helpdesk support. The results show that approximately 43 per cent of respondents who answered this question gave helpdesks a score of 4 and a further 35 per cent gave a score of 3. Approximately 18 per cent allocated helpdesks a score of 1 or 2, while only 4 per cent allocated a 5 out of 5 score.

While the majority of respondents seem generally satisfied, the results and comments (see below) still indicate that there is room for improvement. The importance of good customer support has been highlighted in recent years at the Information Industry Awards, held in London as part of the annual Online Information event. The Awards include a prize for Best Customer Service, which is sponsored by FreePint. Winners so far have included Factiva, Xrefer, STN Agency UK, and Bureau van Dijk Electronic Publishing.

### *Comments on helpdesks*

The majority of comments related to the variability of helpdesks. The comments listed below tend to be more specific:

- Variable. FactSet is good. Some individuals within helpdesks are good.
- They vary – for example, Factiva – hopeless; Datastream – excellent.

- I object to having to look at Q&A before the helpdesk will deal personally with my problem.
- Usually pretty good and fairly fast at getting back.

## **Inadequate coverage**

*Are there any areas of business information that are not covered adequately by the current range of sources? (Please give details)*

Over a quarter of respondents (27 per cent) of the standard Survey still believe that there are gaps in the provision of certain types of business information. A few of these identifiable gaps crop up in the Survey year after year. Gaps may exist simply because there is no data to fill them. The lack of European private company data, for example, is mentioned often. Gaps exist because of compliance regulations and, where this is apparent, the majority of information providers do their best to provide summary information.

A lack of European executive data is another area that respondents feel could be improved upon. It was identified as a gap by last year's respondents, as was Chinese and Korean company financial data. Respondents also identify several perceived or actual gaps in UK company information provision, including information on wholesalers and business start-ups, and a lack of news on UK SMEs.

Some of the comments are baffling. Without further discussion with the respondent who believes that there's a gap in the provision of market research, it's very difficult to comment further.

Comments on gaps in the provision of business information:

- Lots of sources but not as well indexed/presented as they could be. Still rely on primary sources. (Corporate)
- Good bibliographic information in an electronic format. (Academic)
- Ireland. (Academic)
- Executive compensation. (Academic)
- European executive biographies – coverage is poor. (Corporate)

- Information on wholesalers. (Public)
- Information on business start-up. (Public)
- News on UK small and medium-sized companies (SMEs). (Others)
- European private company data (2). (Corporates)
- Chinese and Korean company financials. (Corporate)
- Media usage – need TGI (Target Group Index) data at a realistic price for education. (Academic)
- Realistically priced market research. (Academic)
- Market research and international information. (Public)
- Foreign standards. (Corporate)

## Human resource issues in business libraries: staff recruitment and development

*In terms of your library/information staff, what are the key personnel development and training issues that face you?*

As in previous years, we asked specifically about three major factors which affect the ability or willingness of information managers to send their staff on training programmes.

**Table 7**

Training issues	Percentage of responses
Affordability of such programmes	32
Adequacy of suitable training programmes	54
Accreditation of such programmes	11
Other factors	3
	100

There's been an interesting switch around on these issues compared with last year. Affordability considerations dominated in the last Survey (61 per cent) whereas this year it's the adequacy of such pro-

grammes which is of the greatest concern. The accreditation of courses was not mentioned at all last time, whereas 11 respondees identified it this year.

Other factors that were identified included the following:

- Keeping staff motivated who have many years research experience but do not necessarily want to be managers. (Corporate)
- Location of training – often these are in London and professional organizations do not seem to realize they have members in the regions who find it difficult and costly. (Government & Academic responses)
- Key issues also include time available to take the training. (Two academic respondents)

*Which external library and information service training providers do you use?*

**Table 8**

Training provider	Respondents
CILIP	33 (59%)
TFPL	19 (34%)
Aslib	16 (29%)
UKeIG	7 (12%)
Others: ANLTC; ARK Group; BIALL; CiG; CLIG; Grampian Information Group; M25 CPD; Scottish Information Network; Dialog and other training offered by publishers onsite; EU training programmes and locally arranged courses such as those from the Business Information Forum.	

Since we started asking this question three years ago, CILIP has consistently emerged as the most favoured training provider for respondents of the standard Survey. Even with a better representation from the corporate sector, this year's results still rank CILIP first, with 59 per cent of respondents claiming to use it – only 1 per cent down on last year's results.

This year's results sees TFPL jump from fourth to second place. At the same time, Aslib has slipped from second to third place, and UKeIG has dropped from third to fourth place. TFPL's training courses are highly favoured by the corporate respondents and, given their better representation in this year's Survey, accounts for the company's higher ranking. By the same token, we would have expected Aslib to have maintained its position but the organization has

undergone a number of recent changes, which may account for its drop in the rankings.

Although we did not ask for comments, one respondent (Academic) echoed the earlier comment made above, regarding regional training. He/she said, 'Mainly held in the South. More regional training is required.'

*Of which professional bodies are you or your staff members?*

**Table 9**

Professional bodies	Respondents
CILIP	43 (77%)
CiG	10 (18%)
Aslib/IMI	8 (14%)
SLA	7 (12%)
Others: BBSLG (2); SCONUL (2); BIALI; CLIG; Library Association of Ireland; NOWAL; Scottish Information Network; The 200 Club	

For the third year running, the standard Survey asked, 'Of which professional bodies are you or your staff members?' and, once again, the results show CILIP is the most popular professional member organization. Approximately 77 per cent of respondents' organizations have at least one member of staff who has membership of CILIP. Of the corporate respondents, approximately 60 per cent say that either they or someone in their organization is a CILIP member.

None of this is particularly surprising given the pre-eminence of CILIP in the professional milieu. Another factor this year is clearly the collaboration with CILIP in the gathering of the data and the degree of exposure the Survey questionnaire received on the CILIP website.

However, it's interesting to note that a number of the comments question the validity of both CILIP and its qualifications for individuals working in the business information sector. There is a strong belief by many – as witnessed by the large number of postings relating to CILIP on the FreePint Bar (February 2006) – that professionals working in the corporate sector are sidelined by CILIP and that the organization's qualifications are often not required or recognized by the commercial sector.

CILIP's finances are the subject of much concern and have driven the need to cut back on a number of key staff. It's vital, as CILIP's Chief Executive

acknowledged in the FreePint Bar debate, that the Institute does represent and cater for all sectors of the relatively small LIS profession. From the tone of the fierce comments from members and non-members alike, CILIP has much work to do if it is to be seen to be effective and appropriate for staff working in the corporate information environment.

*Do you have any comments on CILIP's Framework of Qualifications?*

For the first time, this year's standard Survey asked for feedback on what respondents think about CILIP's Framework of Qualifications. The new Framework was introduced last year and, very briefly, it offers five levels: Chartered membership (MCLIP); Fellowship (FCLIP); Certification (ACLIP), a new and somewhat controversial qualification which recognizes the contribution of paraprofessionals; Revalidation, which is available to chartered members seeking to gain recognition of their personal professional development; and the Mentor Scheme, whereby experienced professionals help candidates realize their potential within the profession.

While the objective of embracing a wider community of information workers is entirely laudable and strategically necessary for CILIP, there are mixed views from our respondents about whether the existing scheme is the best way to achieve this goal.

*Comments on CILIP's Framework of Qualifications:*

- The process of gaining Chartership is ridiculous – all that sticking bits of paper in portfolios! Also their regulations are practically uninterpretable! (Academic)
- CILIP is seen as increasingly irrelevant to the business information profession. I'm not sure if this is something CILIP can easily change. (Others)
- Irrelevant to the commercial reality of the industry. (Corporate)
- No – I've never looked for CILIP Chartership when recruiting staff and they have never asked for CILIP Chartership to be supervised. We have set up our own training curriculum to give a competency framework and career progression for staff. (Corporate)
- We are in danger of dumbing down the library and information profession. (Public)

- A bit slow getting off the ground (e.g. the mentor list took a while to appear on the web site). (Government)
- I am looking to apply for revalidation of Charter-ship. (Corporate)
- A good step forward. (Corporate)
- I'm training to be a mentor but have yet to look at it properly. (Academic)

*To which discussion forums do you or staff contribute?*

**Table 10**

Discussion Forums	Respondents
FreePint Bar	28 (50%)
LIS-CILIP	20 (36%)
BUSLIB	11 (20%)
LIS-UKEIG (UKOLUG)	10 (18%)
Others: LIS-LINK (3); LIS-Business (2); Infolit; LIS-BAILER; LIS-LAW; LIS-SCITECH; LIS-UCR; PIUG; SLA	

Forums are an important part of virtual communities, enabling users to post questions, raise matters for discussion and generally communicate with other individuals within a profession or sector. There are an increasingly large number of discussion forums for the library and information profession. For the third year running, the standard Survey asked respondents to list all of the discussion forums they or their staff contribute to.

This year's results show that, once again, the FreePint Bar is the most-used discussion forum, with 50 per cent of respondents listing it. Last year's results placed FreePint joint first with CILIP's discussion list LIS-CILIP. CILIP's list has slipped into second place this year with 36 per cent of respondents saying that they or their staffs contribute towards it. The third and fourth places are the same as last year, with BUSLIB being ranked third and LIS-UKEIG (UKOLUG) fourth.

Respondents show that between them they access 13 lists which show the importance library and information professionals place on discussion lists and their usefulness as a networking tool.

*Which professional sources/trade magazines do you subscribe to/read regularly?*

For the first time last year, the Survey investigated professional reading by asking the question 'Which professional sources/trade magazines do you subscribe to/read regularly?' This year the question was asked again as part of the standard Survey.

**Table 11**

Source	Respondents
FreePint	37 (66%)
Information World Review Update	36 (64%)
Managing Information	22 (40%)
Information Today	13 (23%)
Searcher	5 (9%)
Information Advisor	1 (2%)
Others: Information Age	

The top three most popular sources for library and information professionals are *FreePint*, *Information World Review (IWR)* and CILIP's *Update*. In fourth place is Aslib's subscription magazine *Managing Information*. This year, *Update* has slipped from last year's number one position to second equal this year. FreePint's membership is growing and the company now claims to have more than 77,800, each of whom receives the *FreePint newsletter*. *Information World Review* is published by VNU Business Publications. Like *FreePint* it's free but its circulation is smaller at 10,000.

The three US publications, *Information Today*, *Searcher* and *Information Advisor* are not as popular as the UK titles with our respondents. Unlike the UK titles, they all require a subscription.

## Assessing the use and value of business information services

### *Measuring e-product usage*

*Do you monitor electronic product usage statistics, either internally produced or those provided by publishers and vendors? Do you have any comments about usage statistics and their importance in understanding user behaviour, collection management decisions, and so on?*

There is increasing pressure on business information services to improve provision to their respective user communities, and at reduced proportionate costs. For the past two years we have asked questions in this Survey to identify some of the key metrics being used by information managers.

The first one concerns the measurement of the use of electronic resources. As we have already seen, electronic sources are an increasingly vital part of the resource mix so it's extremely important to be able to understand their usage or otherwise. Such data should inform assessments of 'value for money' and decisions on collection priorities. It is widely agreed by producers and purchasers of information that the use of these resources should be measured in a more consistent way.

Library and information service managers want to understand better how the information they buy from a variety of sources is being used; publishers want to know how the information products they disseminate are being accessed. An essential requirement to meet these objectives is an agreed international set of standards and protocols, governing the recording and exchange of online usage data. Project COUNTER ([www.projectcounter.org](http://www.projectcounter.org)) is a major collaborative venture and its Codes of Practice provide standards and protocols that are becoming increasingly adopted by information vendors.

Of the 60 respondents in the Survey who answered these questions, 85 per cent are actively monitoring e-use data in one form or another. There's no doubt that most regard this as an essential set of metrics:

- Very important – not all vendors understand this sufficiently. (Corporate)
- Useful for us to show (a) usage of them – how much, who by, what they use and how often (b) helps us justify buying them. (Government)
- The user stats feed directly to our annual evaluation. Products that cannot provide user stats to us are frowned upon. This would be one of the considerations when we decide to subscribe to a product. (Academic)
- We have a system called 'model library' based on the Balanced Scorecard system which influences decision. (Public)
- These are a useful tool. We need more time and resource to develop meaningful analyses. (Academic)

- There's a clear link to perception of role of information in process of delivery – this can only be covered by clear evidence of usage. (Academic)

There's equally little doubt that, notwithstanding improvements in the wake of COUNTER, there are a number of difficulties in using existing data in a meaningful way:

- I find that changes throughout the year in the way some database providers display their stats prevents a true picture of usage being calculated. (Academic)
- Have had problems recently with LexisNexis invoicing, yet to be solved, and this is an important means of monitoring product usage. We use this as a key criterion when reviewing online products. (Corporate)
- At present we are less than happy with the reliability of them. (National)

And there are some complex methodological issues:

- Statistics are probably now skewed by the use of the Ex Libris MetaLib product, which we have branded as eSearch, as the primary access route to our databases. We are at the same time promoting its MetaSearch functionality as the way to search the databases concurrently. Thus our users, particularly our Business School users, are now searching up to eight databases simultaneously whereas in the past they probably stuck to their favourite database and did not bother with the others. Amount of access takes no account of the quality of information retrieved. (Academic)

### ***Assessing the value of business information services***

*How do you attempt to measure the effectiveness and performance of your business information services? Do you attempt to measure the following aspects of your services: inputs, outputs, outcomes (all defined)?*

*If you attempt to measure 'outcomes', do you have any comments on how useful this has proven, or any other observations on methodologies, lessons learnt etc?*

*Does the senior manager to whom you report look at this data and review it with you?*

As with last year's Survey, we asked the group of 12 targeted senior information managers three questions about the value of the information services they provide. The orthodox presumption is that such assessments are increasingly necessary to both understand the effectiveness of the service and to help to justify the resources being invested by the parent organization.

As Figure 9 shows, there is a range of methods which can be used to gather data on the performance of the service.

Interviews with users are much more frequently used than any other method. Predictably, regular user questionnaires and benchmarking against other similar services are also favoured methods.

- Measuring effectiveness tends to be done informally, via feedback from training sessions and checking on usefulness of specific products. (Corporate)
- SMART (**S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**imely) objectives are reviewed and evaluated on an ongoing basis. (National)
- I think that one measure of whether I am able to provide a useful contribution to the company is the number of requests for me to be involved in important projects; or being invited to attend strategy meetings but also to provide a lot of supporting information to other participants who are giving presentations. (Corporate)
- Over the years we have run questionnaires, interviews and focus groups. That said, we operate a very decentralized service, with information units working very closely alongside their internal clients;

as a result, the main metric tends to be informal and face-to-face feedback. (Corporate)

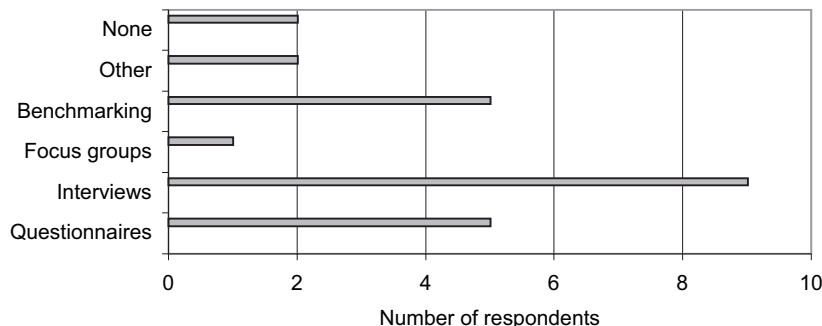
- Feedback from course participants is essential. We are trying to build up a set of case studies and stories. (Academic)

We are also interested in the assessment of LIS inputs, outputs and outcomes. We define these as:

- Inputs: including staff costs, expenditure on information resources, overheads.
- Outputs: enquiries answered, articles downloaded, company reports generated, research reports written.
- Outcomes: the effects on users from the consumption of LIS services – e.g. decisions made, costs saved, business opportunities followed up.

Eleven of the 12 senior information managers questioned confirmed that they measure inputs; 10 confirmed that they quantified outputs, but only three said that they tried to assess outcomes. Some of the issues here were described by the managers in their associated comments:

- We've considered measuring 'outcomes' but yet to see a credible measurement tool. (National)
- I would like to measure outcomes but not enough hours in the day. I do not know how useful this would really be in an academic setting – a higher research rating for the University perhaps! (Academic)
- Very difficult to measure outcomes but we do receive anecdotal feedback on how information has helped



**Figure 9 – Methods of gathering data from users (n = 12)**

to secure an instruction, help a client, save a fee-earner's time etc. (Corporate)

- Outcomes are difficult to measure accurately but this is something that we are working on at the moment. (Corporate)
- Outcome measurement is worthwhile as long as it is not simply to justify existence of information departments. (Academic)

Interestingly, only half of this small group of senior managers sit down with their senior managers to whom they report and jointly review such performance data. The following was a fairly typical response:

- Sometimes I will draw it to [senior management's] attention, but it's not something that they ask me for. (Corporate)

## Strategic priorities in the provision of business information services

The final question in the Survey, answered at least in part by virtually all the respondents, concerns their strategic priorities in the development of their business information services over the next two years.

This is an open-ended question and, as always, has garnered a rich and varied diet of responses.

Figure 10 shows that, though they are heterogeneous, there are discernible trends in the data – and not necessarily the same ones as in previous years. One comment from last year's Survey which does apply again is that the great majority of the issues highlighted are not technical but managerial, strategic and concerned with service and content development.

### *Knowledge management*

- Sharing knowledge/expertise among my team and within wider Business Gateway Information Management network in Scotland. (Government)
- Develop KM more fully. (Public)
- Increase involvement in 'know how' initiatives. (Corporate)
- Better understanding of desk research and KM by end-users. (Corporate)
- Implementing a knowledge sharing strategy. (Corporate)
- Sharing current knowledge with related people. (Corporate)

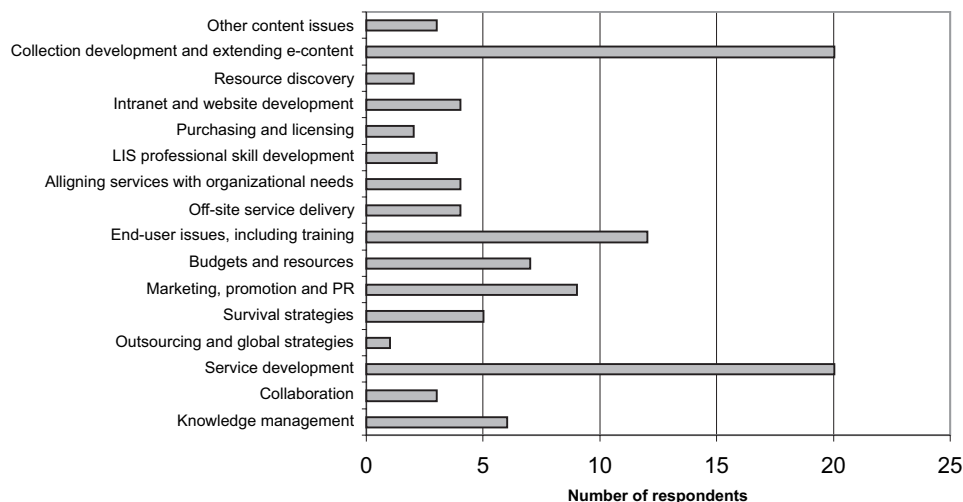


Figure 10 – Key business information priorities 2005–7

*Collaboration*

- Partnership with internal colleagues within [Development Agency]. (Government)
- Develop more external contacts. (Public)
- Develop more partnerships with other organizations in the business area. (Public)

*Service development*

- Improvements in delivery mechanisms. (Academic)
- Develop new services. (Chamber)
- Introduce new services. (Government)
- Tackle the ever-increasing global demands from our business – increase our ‘out of hours’ resources. (Corporate)
- Become an enterprise agency. (Public)
- Develop UK-wide service. (Public)
- Training and staff time to develop access. (Public)
- Develop more appropriate service. (Corporate)
- To ensure that what we offer is what our users want. (Public)
- Provide business information in a form which is appropriate to user needs. (Public)
- Improve accessibility. (Corporate)
- Provide more added value/analysis to our clients. (Corporate)
- Ensuring service is evolving to meet changing needs and expectations of our user base. (National)
- Become a regionally recognized service and provide ‘advanced’ services where applicable to other business libraries in the region. (Public)
- Providing more value added. (Corporate)
- Continue to deliver sustainable growth of service. (National)

- Constant need to re-align service provided with the changing requirements of the business (e.g. as a result of company restructuring). (Corporate)
- Ensuring that we are providing the right service for people based in the other offices, mainly New York and Hong Kong. (Corporate)
- More customized services for faculty and participants. (Academic)
- Growing emphasis on how to import, manipulate and re-present external business information within internal systems – but in more sophisticated ways than the previous ‘shove an annual report on the intranet’ approach! (Corporate)

*Survival strategies*

- We have ended our fee-based service as the market has died and gone to meet its maker. (Academic)
- Concentrate on core users internally – lecturers, UGs, PGs, management level staff. (Academic)
- Income generation. (Chamber)
- Make service more effective. (Corporate)
- Preparing for another merger with another office. (Corporate)

*Marketing, promotion & PR*

- Raising awareness and use of service by local business community. (Government)
- Raise awareness and thereby increase usage. (Chamber)
- Promotion of service. (Academic)
- Market ourselves more. (Government)
- Promotion of service. (Public)
- Marketing. (Public)
- Develop more community business focus by raising our profile. (Public)

- Internal marketing campaign. (Corporate)
- Developing short video presentations on all our resources. (Academic)

### *Managing budgets & resources*

- Obtain more resources. (Academic)
- Managing budgets more effectively. (Academic)
- Get more from existing budgets. (Government)
- Increase staff numbers. (National)
- Increase purchasing budgets. (National)
- Measure our Return on Investment (ROI) more effectively. (Corporate)
- Secure additional staffing and acquisition resources to develop new resources and services for user base. (National)

### *End-user issues including training*

- Increase sources accessible to end-users. (Employers' organization)
- End-user training in the use of products and services. (Employers' organization)
- Development of online training modules. (Academic)
- Improve the extent and quality of information skills provision. (Academic)
- Improve end-user information literacy. (Corporate)
- More user education. (Academic)
- More integration with departmental [end-user] training. (Academic)
- Increased emphasis on information literacy rather than user education specific to certain e-resources. (Academic)
- Increase desktop access for our clients. (Corporate)

- Training programmes for large numbers of UGs. (Academic)
- Develop students' information skills. (Academics)
- More end-user training. (Corporate)

### *Outsourcing and global strategies*

- Maintaining and developing off-shored base in India (Corporate)

### *Off-site and remote delivery of services*

- Encourage more end-user remote access. (Public)
- Better delivery of data to mobile devices. (Corporate)
- Experimentation with new ways of delivering e.g. iPod, Blackberry, etc. (Academic)
- More remote access to databases for our customers. (Academic)

### *Aligning services with organizational needs*

- Closer integration into the curriculum. (Academic)
- Integrate information tools more effectively into the workflow. (Corporate)
- Stronger links with academic schools/faculties. (Academic)
- Improve liaison with university academic staff. (Academic)

### *LIS professional skill development*

- Developing staff skills. (Academic)
- Maintaining public service by continuing staff training. (Public)
- Make our staff aware of the resources they have available. (Public)

*Purchasing & licensing*

- License agreements e.g. access, user stats, tie-ins. (Corporate)
- Evaluation of eResources suppliers. (Corporate)

*Intranet & website development*

- Development of more relevant and appropriate intranet to help to utilize all our resources effectively. (Academic)
- Intranet development. (Corporate)
- Continue to develop website as core tool in promoting and marketing services. (National)
- Developing our intranet to be much more user friendly. (Academic)

*Collection development/extending eContent*

- Increased use of electronic sources where available/relevant. (Employers' organization)
- More e-things (especially core texts). (Academic)
- Integration of eBooks into the mainstream. (Academic)
- Expand eBooks. (Academic)
- Keep up-to-date with changing information resources. (Public)
- Increase electronic resources. (Public)
- Improve electronic facilities. (Government)
- More electronic access. (Academic)
- Moving printed sources to online. (Academic)
- Review value for money of e-subscriptions. (Academic)
- Sort out print/e-journal mix. (Academic)
- Integration with full-text delivery. (Academic)

- Fine tuning the business resources to meet teaching and research criteria. (Academic)
- Greater use of eResources, internally and externally produced. (Corporate)
- Greater integration of knowledge resources. (Corporate)
- Ensuring we have best of breed for all suppliers. (Corporate)
- Sourcing reliable data in India/China. (Corporate)
- To research and document resources for Ireland. (Academic)
- More effectively exploiting the vast range of news-feeds and alerts delivered within organization. This has become even more challenging with the recent moves by producers such as the FT to disaggregate their content from vendors such as LexisNexis and Factiva, thereby leading to even more fragmentation. (Corporate)
- In contrast to a year ago, there will be less focus on searching for a one size fits all solution and accepting that maybe our needs are so complex and diverse that we will continue to use a mosaic of different sources – some general, some specialist. (Corporate)

*Other content issues*

- Integrate with University's Virtual Learning Environment. (Academic)
- eLearning. (Corporate)
- Integration into Virtual Learning Environments. (Academic)

*Resource discovery*

- Better metasearching facilities. (Academic)
- Ensure our internal research is catalogued and stored to allow users to access it easily and quickly. (Corporate)

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