



Trendspotting IV:
Searching for the Best Search Tools
Harry Jack Gray Conference Center,
University of Hartford
Friday, January 9, 2009

Trendspotting

Current themes in Library automation

Marshall Breeding
Director for Innovative Technologies and Research
Vanderbilt University
<http://staffweb.library.vanderbilt.edu/breeding>
<http://www.librarytechnology.org/>

Summary

- We are bringing back Marshall Breeding of Vanderbilt University, who will follow up on his November presentation in Middletown, sharing early returns from his Perceptions 2008 International Library Automation Survey. Check out Marshall's article in the November/December 2008 issue of *Library Technology Reports* on Open Source ILS.

Perceptions Reports

- First survey conducted in late 2007
- Perceptions 2007: an international survey of library automation
- <http://www.librarytechnology.org/perceptions2007.pl>

2008 Survey

- 1320 (so far)
- 48 Countries

ILS Product Satisfaction

Statistics related to the question: How satisfied is the library with your current Integrated Library System (ILS)?

Satisfaction Score for ILS		Response Distribution										Statistics			
Company	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
Polaris	34					2	1	4	5	15	7	8	7.50	8	1.03
Millennium	194			1	3	6	8	26	56	71	23	8	7.21	7	0.57
Library.Solution	21					2	1	3	4	7	4	8	7.19	8	0.87
Virtua	22			1	1	2	1	5	8	4		7	6.18	7	0.85
Unicorn	147	1	3	4	7	9	24	27	45	22	5	7	6.03	6	0.49
Horizon	130	2		4	9	10	16	28	35	23	3	7	5.99	6	0.61
ALEPH 500	40	2			2	3	4	10	15	3	1	7	5.90	6	0.63
Koha -- LibLime	17	2			1		2	5	2	2	3	6	5.88	6	1.21
Voyager	46			3	2	7	2	13	13	4	2	6	5.85	6	1.03
Circulation Plus	14	1	2		1	1	1		4	2	2	7	5.43	7	0.27
Dynix	12	1		1	1	1	1	3	3		1	6	5.17	6	2.02
Winnebago Spectrum	16			5	2	1	3		1	2	2	2	4.75	5	0.50
Athena	13	1	1	2	1	2	1	1	3		1	7	4.38	4	0.55

Company Satisfaction

Statistics related to the question: How satisfied is the library overall with the company from which you purchased your current ILS?

Satisfaction Score for Company		Response Distribution										Statistics			
Company	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
AGent VERSO	16					1			2	4	9	9	8.19	9	2.25
Polaris	49					3	3	2	5	15	21	9	7.82	8	0.57
Evergreen	12						1		7	1	3	7	7.42	7	2.60
Library.Solution	29					2	5	1	3	11	7	8	7.28	8	0.74
Spydus	11					1			6	2	2	7	7.27	7	2.41
Millennium	280	4	1	12	13	14	24	45	79	59	29	7	6.41	7	0.48
Virtua	32		2	3	1	2	3	2	11	8		7	5.84	7	0.71
Koha -- LibLime	25	2		1	3	2	1	2	6	4	4	7	5.84	7	1.40
Voyager	81	1	1	4	8	5	14	13	23	11	1	7	5.67	6	0.56
Circulation Plus	18		3	1	2	1	1	2	3	2	3	1	5.33	6	0.24
ALEPH 500	59	2	2	6	5	6	6	14	9	6	3	6	5.17	6	0.26
Unicorn	220	9	9	16	28	25	22	41	40	24	6	6	5.03	6	0.40
Infocentre	16			3	1	2	5	2		1	2	5	5.00	5	0.75
Dynix	21	2	1	2	1	4	3		3	4	1	4	4.81	5	0.44
Winnebago Spectrum	20	3	2	2	1		2	5	2	2	1	6	4.40	6	1.12
Horizon	201	16	10	21	25	31	30	25	26	11	6	4	4.35	4	0.28
Athena	22	3	4	2	1	2	1	4	2		3	1	4.05	4	1.28

Support Satisfaction

Statistics related to the question: How satisfied is this library with this company's customer support services?

Satisfaction Score for ILS Support		Response Distribution										Statistics			
Company	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
AGent VERSO	16			1					1	2	12	9	8.31	9	2.25
Polaris	49	1				3	4	3	8	11	19	9	7.45	8	0.57
Evergreen	12						2	3	2		5	9	7.25	7	2.60
Library.Solution	28	1				2	1	3	8	7	6	7	7.04	7	1.32
Millennium	278	2	4	7	9	14	34	41	83	61	23	7	6.45	7	0.48
Dynix	21	2		1	1	1	3	3	2	7	1	8	5.76	6	1.75
Voyager	81	1	3	2	9	5	12	18	13	14	4	6	5.69	6	0.56
Virtua	32	1	1	2	2	2	5	7	4	7	1	6	5.59	6	0.71
Koha -- LibLime	25	2	1	1	1	2	4	5	2	3	4	6	5.52	6	1.00
Circulation Plus	18	1	3	1		1	2	1	4	1	4	7	5.39	7	0.24
Infocentre	16		1	2	1		4	3	2	1	2	5	5.38	6	1.50
Horizon	201	8	5	16	20	20	19	34	40	31	8	7	5.35	6	0.35
ALEPH 500	59	2	1	5	10	4	10	8	11	5	3	7	5.07	5	0.39
Unicorn	219	12	12	21	18	20	35	34	36	22	9	7	4.91	5	0.41
Winnebago Spectrum	20	3	2	2	1	2	2		4	2	2	7	4.45	5	0.22
Athena	22	5	3	1	2	1	3	2	2	1	2	0	3.73	4	1.28

Company Loyalty

Statistics related to the question: How likely is it that this library will purchase its next ILS from this company?

Loyalty to Company Score		Response Distribution										Statistics			
Company	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
AGent VERSO	16					1			2	2	11	9	8.31	9	2.25
Evergreen	12						2		2	3	5	9	7.75	8	2.60
Library.Solution	29			1		1	4	2	3	5	13	9	7.45	8	1.11
Polaris	50	3	1	1	1	1	2		3	14	24	9	7.38	8	0.42
Millennium	274	7	6	13	8	13	27	25	57	66	52	8	6.53	7	0.48
Spydus	11	1	1				1	1	1	3	3	8	6.36	8	0.30
Voyager	81	4	2	9	6	7	12	11	12	12	6	5	5.26	6	0.78
Koha -- LibLime	25	4	1	3	1		3	1	3	2	7	9	5.24	6	1.00
ALEPH 500	59	4	3	1	7	7	8	8	7	8	6	5	5.24	5	0.13
Dynix	20	3	1	1		3		3	3	4	2	8	5.20	6	0.22
Virtua	31	5		1	4		5	2	7	7		7	5.03	6	0.54
Unicorn	219	21	13	17	17	15	33	20	39	32	12	7	4.93	5	0.41
Horizon	201	24	17	16	16	23	32	21	21	13	18	5	4.42	5	0.21
Circulation Plus	18	6	2				1		5	2	2	0	4.22	7	0.00
Infocentre	15	3		3	2		3	1	1	1	1	0	3.80	3	0.52
Winnebago Spectrum	20	8		1		1	4		1	2	3	0	3.80	5	0.00
Athena	22	9	1		1	2	2	2	1	1	3	0	3.45	4	1.28

Open Source Interest

Statistics related to the question: How likely is it that this library would consider implementing an open source ILS?

Interest Level in Open Source		Response Distribution										Statistics			
Company	Responses	0	1	2	3	4	5	6	7	8	9	Mode	Mean	Median	Std Dev
Koha -- LibLime	20	1					2		1		16	9	8.05	9	2.01
Winnebago Spectrum	20	4		1	1	2	2	2	2	1	5	9	5.10	6	0.00
Infocentre	16	3			1	1	3	2	4	1	1	7	4.94	6	1.75
Athena	22	5	2		1	2	3	1		1	7	9	4.77	5	0.00
Horizon	201	21	22	18	13	17	22	15	26	14	33	9	4.76	5	0.63
Dynix	21	3	2	1		5	2	2	1	1	4	4	4.62	4	0.22
Voyager	80	9	7	10	6	3	14	6	9	4	12	5	4.58	5	0.67
ALEPH 500	59	7	6	7	3	5	12	5	9	1	4	5	4.17	5	0.65
Unicorn	217	36	22	19	22	14	35	11	23	14	21	0	4.08	4	0.20
Circulation Plus	18	5		3	1	1	4		2		2	0	3.61	4	0.94
Millennium	277	45	38	40	26	20	34	24	17	15	18	0	3.58	3	0.06
Virtua	32	7	8	5			2	3	2	4	1	1	3.16	2	0.88
Library.Solution	29	6	5	4		3	5	3	2	1		0	3.10	2	0.00
AGent VERSO	16	6	2	2	1	1	1	1	1	1		0	2.44	2	0.00
Polaris	49	15	13	6	2	2	7		1		3	0	2.20	1	0.29
Spydus	11	7	1	1	2							0	0.82	0	0.00

Marshall's Trendspotting

Libraries feeling the pain of the economy

- Library funding cuts widespread
- Many automation projects on hold
- Pressure to accept lowest-cost alternatives rather than higher cost preferred options
- Hope that open source software will provide savings
- Economic pressure may necessitate innovation

Open Source ILS

- Increasing adoption in the United States and Canada
 - Koha, Evergreen, OPALS
- Less interest in Asia, Europe, UK
- India
 - NetGenLib, Koha
- Strong interest in Latin America
 - Koha, ABCD

Open Source Companies

- US: LibLime, Equinox, MediaFlex
- Aggressive marketing
 - Concept of open source
 - Promotion of specific products
- Struggling to meet expectations
 - Satisfaction lower than many companies offering proprietary products
 - Some companies offering proprietary products score much lower than open source

Proprietary Closed-source ILS

- Some ILS products offered through traditional licensing continue to prosper
- Some proprietary ILS products seeing significant numbers of library defections
- Systems more mature and rich in features
- Balance of power among ILS vendors shifting
- Vigorous competition, especially with new breed of companies involved with open source ILS

Many libraries Not automated / Under automated

- Large portions of public libraries in the United States operate with no automation system, outdated systems, or products not suited for their type of library
- Small rural libraries
- Many public libraries run PC-based systems built for schools because they cannot afford more full-featured systems
- Current automation options priced well above what libraries with limited resources can afford.
- Cost of consortial participation can also exceed financial thresholds

Academic Libraries

- Strong interest in next-generation library automation
 - Increasing proportions of electronic content and complexity of operations push the limits of current system designs
- Strong interest in discovery interfaces
- Need for digital preservation strategies and products as these libraries build ever larger local digital collections

Library automation in the Developing World

- Widespread use of ISIS related software
 - Tens of thousands of libraries
- Growing interest in Koha
- Increasing interest in commercial systems from international vendors when economically possible

Large-scale automation

- Strong interest in regional and statewide implementations
- Open Source and Commercial
 - Georgia: Evergreen
 - Indiana: Evergreen (Early Phases)
 - British Columbia: Evergreen
 - Wyoming: SirsiDynix Unicorn
 - Hawaii: Horizon

Software-as-a-Service (SaaS)

- Vendor hosted, Application Service Provider, Cloud computing
- Increasing adoption by small and medium-sized libraries
- Not a major trend for larger libraries
- Promoted by companies: more profitable for them
- Libraries generally see lower overall costs, more predictable budget model
- Systems and data managed more responsibly

Discovery Interfaces

Social Networking Technologies

- Strong interest in offering social features to library users
- Expected functionality in Next-gen catalogs
- Layer social features into legacy catalogs
 - LibraryThing for Libraries
 - ChiliFresh – shared engine for resource reviews