



# Academic Book Discovery, Evaluation and Access

Insights and opportunities  
for enhancing the  
scholarly experience

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**‘But what  
a tortuous,  
untraceable  
business the  
coming of  
knowledge is!’**

Oswald Sydenham in  
*The Story of an Education*  
H.G. Wells, 1918

# Contents

<b>Executive summary</b>	<b>04</b>
Key findings	05
About the author	07
<b>Contexts</b>	<b>08</b>
The changing information-seeking landscape	09
Understanding scholarly users	12
<b>Methodology</b>	<b>15</b>
Employing a design-thinking approach	16
Gathering information about user behaviour	17
<b>Understanding the book discovery, evaluation and access journey</b>	<b>20</b>
How do academics discover books?	21
How do academics locate known items?	22
How do academics locate unknown items?	23
How are books for personal use evaluated?	25
How are books for student use evaluated?	26
How do academics access academic books?	28
Where do discovery, evaluation and access take place?	31
<b>Insights into book discovery, evaluation and access</b>	<b>32</b>
Insights: user perspective	33
Insights: library perspective	34
Insights: publisher perspective	35
Insights: bookseller perspective	35
<b>Opportunities to enhance book discovery, evaluation and access</b>	<b>36</b>
Opportunities: user perspective	37
Opportunities: library perspective	37
Opportunities: publisher perspective	38
Opportunities: bookseller perspective	38
Exploring library opportunities	39
Exploring publisher opportunities	42
Exploring bookseller opportunities	47
<b>Key themes</b>	<b>51</b>
Be present	52
Focus on customers	52
Shift to services	53
Adapt	53
Collaborate	53
<b>References</b>	<b>54</b>

# Executive summary

This report summarises learnings from a small-scale exploratory study investigating how humanities academics encounter, evaluate and gain access to print and ebooks related to their research and teaching. The study seeks to understand the holistic user experience, mapping user journeys to identify aspects of book discovery and access that might be improved. The implications for academic libraries, publishers and booksellers are considered, as potential improvements to current systems are mooted along with opportunities for more disruptive innovation.

The study draws on data collected from dedicated interviews with academics and the wider publishing, information studies and researcher-experience literature. Its approach is heavily influenced by design methodologies, as the reality of academic practice is captured through visual tools and possible new academic experiences are generated through divergent thinking.

The results are shared as a series of insights and practical design questions intended to prompt innovative thinking across the academic publishing, bookselling and library sectors. Overall, this report serves two purposes: it is a research paper exploring the experience of academics as they seek out, assess and access book content and the first stage of a collaborative design project to enhance that experience.

## Key findings

- The journeys academics take to discover academic books, evaluate their relevance or usefulness and access the content within them are complex, multi-faceted, circuitous and fragmented. Academics employ multiple search and evaluation strategies, often at the same time, and use both institutional and third-party registration systems, which sometimes prevent access to desired materials.
- Discovery, evaluation and access is not necessarily a linear journey. The individual components may merge together within one event and evaluation may be a two stage process (deciding whether to gain access to a publication and then evaluating the content or approach in further detail once access has been gained). This suggests service providers developing processes or tools tackling only one of these stages may sometimes fail to address academics' needs.
- Academics in this study source known items using Amazon, publisher websites and online library catalogues. Unknown items are sometimes sourced from Google (but not usually Google Scholar or Google Books).
- Academics in this study use a number of sources to evaluate books, gathering information and reading sample material on Amazon, publishers' websites and Google Books. This suggests that, aside from the book itself, there is no single source offering sufficient information or content with which to evaluate a book for purchase or course recommendation.
- Online library catalogues are not used for discovering unknown items or for evaluating products, though physical library collections may be. This poses an important dilemma: should

academic libraries attempt to improve their discovery mechanisms or move their focus away from this role?

- Library catalogue functionality does not live up to academics' expectations of third-party search engines, causing frustration. Training does not appear to improve this situation.
- The academic user experience of library catalogues could be enhanced by implementing user-focused ranking and categorising of results, user-friendly interfaces and an element of 'browsability'.
- Some libraries have experimented with catalogue systems that present results within modular categories, contextualise individual records, provide additional search prompts or encourage browsing. However, these user-focused systems and interfaces are not the norm in UK university libraries.
- Access systems for remotely located items, such as inter-library loans, may deter users from consulting these sources. A rapid and user-focused experience could be provided by delivering inter-library loans in digital form.
- Publishers play an important role in discovery and evaluation, but have a limited direct role in access. Academics trust the search functionality and information provided on publisher sites but seek out lower prices, and a smoother purchase transaction, elsewhere. This prompts the question of whether publishers should sell direct to customers, rather than ceding this role to Amazon.
- Winning business away from Amazon would require new approaches to pricing and a concerted effort to build relationships with academics. Partnerships with online booksellers or other publishers might also open up fruitful opportunities to construct a consolidated and seamless purchasing experience.
- At least one publisher has developed a tool that guides users through a subject area, suggesting alternative search terms while enabling both search and browse functions. This could have wider potential as a user-focused discovery tool, particularly for unknown-item searches.
- Publishers' inspection copy systems, and particularly the access mechanisms and time limits associated with e-inspection copies, can be a source of frustration. This suggests these systems could be more user-focused. It also prompts questions about the nature of the publisher–academic relationship.
- Viewed from the user perspective, the traditional industry distinction between books and journals makes little sense. Academics would like to access individual monograph chapters in the same manner as journal articles.
- Amazon plays a major role in evaluation and access, while other booksellers are largely absent. Academics are drawn to Amazon by low prices, ease of purchase and the opportunity to buy at even lower cost from resellers. This prompts the question of what value other booksellers could, or should, offer academics.
- Buying from Amazon prompts feelings of guilt, suggesting that

academics may use another channel if it could compete on price and ease of purchase.

- Amazon has a limited role in discovery for unknown books, a function that was formerly supported by physical bookshops. There does not appear to be a discovery tool that successfully replicates the academic bookshop experience: easy browsing through a trusted collection of books, which may also be evaluated without restriction.
- This study has highlighted a number of user-focused opportunities to enhance the scholarly experience including:
  - designing catalogue search functionality that matches user expectations
  - supporting and guiding academics as they seek out unknown items and explore unfamiliar fields
  - providing easy and expansive access to descriptive information and content for evaluation purposes
  - offering streamlined and cost-efficient access to granular content
  - delivering access to remotely-located items quickly, easily and cheaply.

Though each of these issues has a natural home within the current ecosystem, these enhancements have the potential to be delivered by any of the current players (libraries, publishers, booksellers or third parties) as well as new entrants.

- Publishers, libraries and booksellers who are committed to enhancing the scholarly experience would benefit from being present when scholars need them, focusing on the needs of the end-user, embracing service models, adapting and collaborating.

## About the author

Anna Faherty has worked in the academic publishing sector for over two decades and in academia for the past six years. Anna held editorial positions within Hachette, Pearson, Cengage and Palgrave Macmillan before working with Oxford University Press, Taylor & Francis, SAGE and Wiley on freelance projects.

Anna has taught on publishing programmes at Kingston University and Oxford Brookes University and is an Honorary Lecturer at University College London and has developed bespoke training courses for a number of academic publishers. Her paper on novelty-centred business models in publishing won the *International Journal of the Book* 2014 International Award for Excellence and her online learning courses for professionals are part of an award-winning continuing professional development training suite.

When not researching or teaching publishing, Anna collaborates with museums and archives on a diverse range of print, digital and exhibition projects. Her clients include the British Museum, Design Museum, National Maritime Museum, Royal Botanic Gardens Kew, V&A and Wellcome Collection.

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# Contexts

## The changing information-seeking landscape

The challenge of efficiently locating scholarly information is nothing new. Nor are the scholarly habits (often viewed in a negative light) that evolve as a consequence of technological developments or the system workarounds academics employ in order to reach their goals.

Almost nine hundred years before Google was blamed for the poor state of students' research skills (Creagh, 2011) Chinese scholar Zhu Xi (1130–1200) linked reading without due attention and concentration, and a resulting lack of information retention, with the mass dissemination of books through woodblock printing (Oh, 2013: 21–22). Arab historian Ibn Khaldun (1332–1406) shared similar concerns. For him, the large number of scholarly works was an obstacle to scholarship, as it encouraged students to rely on a limited number of summaries and basic texts rather than spending time studying detailed works (Rosenthal, 1995).

**'If a scholar does not have the books required for his subject, he does not enjoy the privileges of a scholar'**

Giovanni Nevizzano

During the Renaissance, Italian jurist Giovanni Nevizzano (d.1540) observed that the number of available books made it hard to find those one needed, a situation that challenged a scholar's very identity (Blair, 2010: 57). While Nevizzano addressed this issue by producing his own bibliography of legal works (Dorn, 2016), French philosopher René Descartes (1596–1650) took a more grassroots approach. Since it was too difficult to locate the information 'confusingly heaped' in books, Descartes preferred to employ the time he might have spent searching for and selecting useful material in working to derive the knowledge himself (Blair, 2010: 4–5).

These weren't the only workarounds implemented by sixteenth- and seventeenth-century scholars struggling with book selection and information sourcing. Educated book buyers, such as English diarist John Evelyn (1620–1706), consulted the catalogues of auction houses (publications intended to market the contents of a library when it was auctioned off) as discovery tools, referring to them for guidance about what to purchase for their own library or even acquiring sufficient insight into the content of a work that it removed the need to procure the book altogether (Blair, 2010: 165).

### Library perspectives

Renaissance libraries developed new ways of organising and promoting books and manuscripts in order to help readers discover, access and use them. While many early catalogues or bibliographies simply listed the books owned by a particular individual or library, a collective bibliography developed by the religious houses of the Windesheim Congregation (1470–1530) in the Netherlands took the added step of including information about the physical locations of books among the houses (Blair, 2010: 162). This must have been an oddity at the time, since Scottish minister and sometime librarian John Dury (1596–1680) – whose strong views about the purpose of university libraries led him to describe them as 'no more than a dead bodie' – recommended this approach over a century later (Dury, 1906: 41–43).

Helping people find items they know they need is only one aspect of supporting scholars. Dury felt the keepers of these inanimate collections, in addition to simply taking care of books, should be agents for the 'advancement of universal learning'. Such a mission entailed making new acquisitions and

**‘Truly significant  
attainments  
become lost in  
the mass of the  
inconsequential’**

Vannevar Bush

the putting forward of books and manuscripts ‘in the way which may be most useful unto all’. In addition to sharing shelving locations, Dury wanted libraries to produce catalogues that ranked titles ‘in an order most easie and obvious to be found’ (Dury, 1906: 41–48). Without these innovations it was feared the precious knowledge within books might remain hidden and subterranean (Greengrass, 2002), a concern echoed three centuries later by American engineer Vannevar Bush (1890–1970) when he called methods for transmitting and reviewing research ‘totally inadequate’ (Bush, 1945). Today, Forsyth (2014: 23) likens the mass of ‘unknown unknown’ books to an undiscovered continent, waiting to be encountered by an intrepid explorer.

German philosopher Gottfried Leibniz (1646–1716) might have aided such explorers when, rather than simply listing holdings and locations, he envisaged a bibliography more akin to a content database. While working at the 100 000 volume Herzog August Library in Wolfenbüttel Leibniz dreamt of a central searchable index populated with brief summaries of new titles sourced from publishers (Wright, 2014: 32). Leibniz’s unachieved vision was taken a step further by Belgian bibliographer Paul Otlet (1868–1944), who conceived a bibliographic system that could, in theory, drill down into the granular components of a book or article (Wright, 2014: 86).

In the early 1900s Otlet was so taken by the arrival of microphotography (which enabled a complete book to be stored on a piece of film the size of an index card) he envisaged an integrated storage and retrieval system whereby users might browse catalogues and entire books on microfiche, never having to leave their desks to find a volume on the library shelf (Wright, 2014: 101). Within twenty years Russian chemist Emanuel Goldberg (1881–1970), whose work with microdots heralded the possibility of carrying thousands of books in your pocket, patented the first document retrieval system enabling users to locate, select and display documents meeting a set of search criteria. Documents stored in Goldberg’s ‘Statistical Machine’ were indexed with codes, or metadata, reflecting aspects of the content likely to be used by those searching for them (Buckland, 2006: 112–162).

Otlet’s and Goldberg’s visions have become a reality today: scholars now have the power to search for, evaluate, access, read and use books and other research resources from a single device and location. However, early online library catalogues served internal purposes more than the needs of users, prompting many people to switch to other, more user-friendly, search tools (Christensen, 2013). Despite calls for the improvement of library catalogue functionality dating back to the 1980s (Borgman, 1996), many of the current systems and tools used for finding and accessing scholarly content are not aligned with the ways in which academics work.

At a time when students and faculty expect libraries to offer a simple, fast and Google-like online service built around their personal workflow (Asher et al., 2013; Dempsey, 2012), the discovery and access experience does not mirror academic practices and preferences (Schonfeld, 2015b). Information seeking and retrieval processes are circuitous, confusing and frustrating, while content lies in ‘archipelagos’ that prove more challenging to navigate than they should (Conrad, 2015; Schonfeld, 2015a).

Today's library systems are often in flux; they appear complicated and inflexible, prompting scholars to employ creative workarounds in order to access information in the least time (Gessner and Wilcox, 2011). Yet as Amazon, Google and unknown future applications become easier to use and more powerful, scholars will develop even higher (and probably unfulfilled) expectations of library services (Borgman, 1996). This has prompted at least one university library to accept that it no longer has a role in discovery and to focus, instead, on delivery (Kortekaas and Kramer, 2014).

### Commercial perspectives

Publishers and booksellers have also played changing roles in scholarly book discovery processes. Early printers, under pressure to recoup their costs as quickly as possible, had a financial imperative to raise awareness of their own books. To this end, the printing and distribution of sales catalogues and the production of title pages both emerged around the sixteenth century. Title pages advertised information about the work, the author and useful features, such as indexes. Unsurprisingly the descriptions sometimes strayed into the world of deception. Sales catalogues played more of a dissemination role, transmitting information about books to potential buyers in far-flung locations (Blair, 2010: 53, 164).

Early bookseller catalogues naturally offered a more diverse range of titles than those produced by a single printer or publisher; some also included second-hand books. Eighteenth-century London bookseller Edward Ballard (1708–1796) was known for his lists of works on divinity, which he arranged into themed sections, with a price alongside each title and terse notes about the binding or overall condition (Curwen, 1873: 78). By the nineteenth century, Oxford bookseller Benjamin Henry Blackwell (1849–1924) included within his catalogue the testimony of supporting 'authorities', appreciations from other writers and his own occasional endorsement (Norrington, 1983: 19). Less scrupulous booksellers of the time were lampooned as 'carpenters' who might construct over-embellished copy (Knight, 1865: 297).

Despite these and later marketing developments, selling a book was considered the 'most difficult labour' of ancient printers, or even, as British publisher Stanley Unwin (1884–1968) claimed, 'the most difficult task ... a mortal man can embark on' (Knight, 1844: 134; Unwin, 1926: 170). Orrin Cheney viewed the gap between publisher and reader as a 'tragedy', a space with 'so many gaps, so many confusions' (Striphas, 2011: 88). Indeed, publishers may have perfected the art of producing books in the centuries since printing began but, at the end of the twentieth century, they were still described as struggling with how to get them into the hands of readers (Vanderbilt, 1999: 145).

Of course, there is a distinction between publicising a product with the aim of increasing awareness and the concept of 'discoverability', defined by Morris et al. (2013: 183) as 'the efficiency with which any given [content] can be found by a searcher'. Economic models of the past were based on companies 'pushing' information out to consumers. In a similar vein to the shift between printed library catalogue lists and searchable databases,

Negroponte (1995: 170) presciently predicted a shift to a ‘pulling’ model, where customers ‘reach into the network’ to access material. In this context, today’s publishers need to help readers *discover* their products as much as promoting and describing them (Clark and Phillips, 2014: 221). And they must do this in a world of changing book-buying habits, a world where online browsing behaviours are more linear than physical bookshop experiences, there are dozens of potential routes to discover new titles and customers define the channels they use to glean information (Greenfield, 2012; Laing and Royle, 2013; Kreutzer and Land, 2013: 55).

Companies who shift their marketing focus from push to pull end up investing in user research and developing improved search and navigation tools in order to maximise opportunities for making products, and information about products, discoverable (Morville, 2005: 102–103). This concept of exposing ‘information about products’ is key. Today, we don’t just search for and access content online, we make decisions about purchasing in a different way – even at a different stage along our discovery and access journey (Lecinski, 2011: 23–29).

Customers now have the ability to consult more information than ever before about products, and prices, before the point of purchase. This power shift to the customer has created a new decision-making moment where consumers search for information about products and where initial impressions about products and brands are formed. Google have named this crucial moment, when a journey to purchase may commence or falter, the Zero Moment of Truth or ZMOT (Morville, 2005: 4; Lecinski, 2011: 9).

Smart companies, aware that ZMOT is a key success factor in customer journeys, strive to play an active role in creating it (Kreutzer and Land, 2013: 54). Thus, while discoverability ought, along with timeliness and accessibility, to be a key area of focus for publishers (Hall, 2013: 69), so should creating, owning and winning ZMOT. Addressing this challenge in the academic arena is no easy feat: an already complex process is compounded by the blurring of roles between libraries and publishers and the arrival of new players within the academic information ecosystem (Odlyzyko, 2015).

**‘ZMOT is that moment where you grab your laptop, mobile phone or some other wired device and start learning about a product or service’**

Jim Lecinski, Google

## Understanding scholarly users

To deliberately improve discovery and access processes organisations need to know where problems occur. The traditional measures of publisher, bookseller or library success, such as usage, sales or financial figures, deliver little value as diagnostic tools. These metrics focus on the product not the service. They reward victories without discovering or investigating points where users are ill-satisfied or sales are lost (Underhill, 2009: 20). Focusing on scholars’ goals (rather than organisational ones), understanding academic work processes and keeping an open mind about possible solutions are all more useful approaches for supporting academic users in today’s competitive discovery environment (Morris et al., 2013: 400).

Gaining real insight into customer or user behaviour requires more than conducting surveys or focus groups (Morville, 2005: 104). Effective research approaches need to examine both explicit practices and implicit decision-making, describing and mapping workflows and surfacing problems hidden in

plain view (Abram, 2013, cited in Conrad et al., 2015; Schonfeld, 2015a: 13; Underhill, 2009: 19). Inevitably, this may mean researching areas and actions beyond the sole realm of the librarian, bookseller or publisher. Researchers must look beyond organisational boundaries and walk ‘in the shoes’ of users to gain deep insights into how users think, work and interact with book content throughout their entire discovery, evaluation and access journey (Prosser, 2014).

### Mapping customer journeys

One practical tool for capturing information about user experiences is journey mapping. Customer journey maps (also known as customer experience maps) are strategic tools for discovering and visually presenting the various interactions a user experiences with a product, brand or ecosystem over time (Adaptive Path, n.d.: 4). Creating journey maps requires a conscious focus on the customer or user rather than the organisation (Liedtka and Ogilvie, 2011: 61), which, by definition, ensures solutions are designed around user needs rather than internal operational efficiencies (Kolko, 2015).

Journey mapping can help identify whether (and where) customers may be confused, when and how information is exchanged with customers, what stress and failure points customers encounter and when they experience emotional highs and lows (Barnes and Kelleher, 2015: 96–109; Adaptive Path, n.d.: 3). The process may also identify new opportunities for organisations to connect with customers during their journeys (Solis, 2013: 62).

Journey maps present alternative ways of looking at problems – ways that are not dependent on exhaustive analysis (Kolko, 2015). They have the power to spark creative thinking about how to satisfy the unarticulated needs of customers – needs that may not be identified in research methods with large sample sizes – and may generate ideas for future prototyping (Liedtka and Ogilvie, 2011: 71).

Like techniques used to observe shoppers in physical retail environments, the results of journey mapping may sometimes appear to be plain common sense, yet verbalising aspects of experience that we take for granted allows us to see perceive them in new ways and prompt creative thinking (Koestler, 1975: 108). Journey mapping may also lead to recommendations for fine tuning rather than dramatic intervention (Underhill, 2009: 287). In the context of book discovery and access this may be more of a benefit than a limitation. After all, Amazon founder Jeff Bezos has spoken about gaining competitive advantage not through major innovation but by weaving ‘a rope of smaller advantages’ and Faber CEO Stephen Page advocates ‘implementing small pieces of innovation’ too (Faherty, 2013).

Though examples of journey mapping in the scholarly ecosystem are rare, Cambridge University Library have built experience maps visualising the complex journeys undertaken by academics as they seek out information or publish books (available at [repository.cam.ac.uk/handle/1810/252881](https://repository.cam.ac.uk/handle/1810/252881)). These maps are developed from interviews with academics and observations collected while shadowing them. Spending entire days at academics’ sides, researchers posed questions to gauge how participants felt as they completed specific tasks and gathered information about the workarounds the academics employed to

**‘The process of mapping uncovers the key customer moments that, once improved, will unlock a more compelling and more valuable overall experience’**

Brandon Schauer,  
Adaptive Path

achieve their aims (Kingsley, 2016). This research is part of an open innovation programme based on user-centred design that has led to the development of new tools and library services (University of Cambridge, n.d.).

In the publishing sphere, consumer insight is now at the heart of many trade publishers' activities (Eyre, 2014), yet this insight is sometimes limited to identifying customers and the channels that may be used to reach them (Livingston, 2013). The Holy Grail for consumer insight teams in publishing is the linking of disparate pieces of data together, to create 'a view of the consumer across multiple touchpoints' (Jervis, 2015) – in other words, 'a journey'. Even when phrased in this form, though, the publishing approach to journey mapping appears to omit a major component: the emotional experience of the customer or user. It is this emotional perspective that helps to uncover latent needs and shapes design towards the solutions that will be most accepted by users (Brown, 2009: 229–230). Some academic publishers have used this approach, observing customer workflows to build deep understanding about customer needs and then finely tuning user-focused solutions (John Wiley & Sons, n.d.: 11). However, the findings of these commercial studies are not always publicly available, which limits their usefulness beyond the development of these specific publisher's products and services.

# Methodology

**‘Design thinking  
is an essential tool  
for simplifying and  
humanising’**

Jon Kolko

## Employing a design-thinking approach

This study investigates academics’ experiences through the use of customer journey mapping, a technique common in user-centred design practice (King, 2008: 134). Journey mapping may be considered a form of ‘design thinking’, a set of principles that helps companies make sense of complex situations and supports innovation (Kolko, 2015). Design thinking emphasises empathy, enables prototyping and tolerates failure. It is an ‘open-ended, open-minded, and iterative’ exploratory process (Brown, 2009: 17), an approach that challenges its use as a research methodology. In particular, adopting a design thinking approach influences the choice of study participants and the manner in which their reported journeys are analysed.

Journey mapping ‘does not prove anything’ (Liedtka and Ogilvie, 2011: 71). It also strays beyond tangible issues, such as products and technology, into the ‘hazy zone’ of emotional value (Brown, 2009: 128). Above all else, journey mapping is an ‘exploration tool’, intended to spark creative thinking, idea generation and innovative service design. This link with divergent thinking and design sets the approach apart from more traditional, convergent, academic research. While scientists are concerned with investigating how things are, and humanities scholars may consider how things affect culture and society, designers are concerned with how things *ought* to be (Nelson, 2010; Simon, 1996: 114). This has led to design being mooted as a ‘third discipline’, a subject that studies situations by empathising with users, simplifying and clarifying information and prototyping better versions of what has been observed (Keeley, 2015).

When searching for insights that may lead to better solutions, an exclusive focus on users ‘in the centre’ of a market may sound like common sense, but it is more likely to confirm current knowledge than prompt new ways of thinking (Brown, 2009: 44). To gather insights that are new and surprising, ‘extreme’ users should be targeted: ‘users who live differently, think differently, and consume differently’. Tim Brown, CEO of design company IDEO, describes these users as ‘obsessives, compulsives and other deviants’. In this study, the participants all possess professional or academic knowledge of the process they are being asked to report on. As publishing lecturers, all are involved in teaching courses that explore issues relating to discovery and access. Many also have professional backgrounds in the academic publishing industry and several continue to pursue publishing careers alongside their academic roles. This professional awareness suggests they may offer different – more ‘extreme’ – perspectives when compared to academics who operate purely as customers or consumers. Their perspectives may, in turn, deliver unexpected insights and generate creative new solutions.

In an ideal world, all the necessary information to reach a solution would be available to researchers. Designers, on the other hand, often work with messy problems where information is limited. To cope with this, a key aspect of design practice is to define, redefine and change problems (Cross, 1982). Unlike other research approaches, a design methodology involves moving away from some of the data (Priestner, 2016) and even adding something to it in order to construct a workable solution. Using a selective focus enables designers to handle massive complexity, by giving structure and direction to

thinking while suspending some issues. The quality of any design solution will be influenced by this reframing process (Lawson and Dorst, 2009: 50–51), which can be the key to deconstructing complex real world problems and generating new ways of working (Dorst, 2010). In this study, the analysis is deliberately selective, some research directions were reframed during the project and insights were constructed from both the participants' reported behaviour, collected during interviews, and additional relevant studies.

## Gathering information about user behaviour

Participants in this study were asked to describe the steps involved in their own 'critical incidents', or journeys, of book discovery. Several journeys were mapped out during each face-to-face interview. These included searches for known and unknown items and products for both personal research and course adoption.

While there is no accepted standard for how to map out a customer journey (Richardson, 2010), face-to-face interviews are an attractive approach since they provide access to the user's perspective, capture the depth and detail of complex issues and reveal aspects of the experience that may not be observed directly, such as assumptions, decision-making processes and feelings (Arksey and Knight, 1999: 32–33; Crowther and Lancaster, 2008:143–150). Constructing the map in front of the interviewee is also beneficial, as gaps in the journey may come to light (Jacka and Keller, 2009: 87–102) and elements that might otherwise remain tacit may be clarified (Anderson et al., 2008: 15).

Jacka and Keller (2009: 87–102) recommend working with a limited list of interview questions, simply asking the interviewee to go through the basic sequence of events from start to finish and posing 'what did you do next?' questions. They also suggest drilling down to identify detailed steps in specific areas if required. In this study, additional information was drawn out by the interviewer (who intervened when participants appeared to leap across a number of steps in the process) and offered by the interviewees (who spotted gaps or misinterpretations when the journeys were presented back to them during the interview).

The maps were constructed around a framework of seven perspectives, based on the approaches used by Adaptive Path (n.d.) and Richardson (2010):

- **Doing:** what actions are users taking to move on to the next stage?
- **Thinking:** how are users framing and evaluating their experience?
- **Feeling:** what emotions do users have? Why are they motivated to carry on?
- **Barriers:** what is preventing users from moving on to the next stage?
- **Place:** where are the actions taking place?
- **Time:** how long do the actions take?
- **Devices:** what devices are involved?

To ensure entire journeys were mapped in detail, the term 'critical incident' was interpreted as any complete journey where the purpose and outcome was clear to the interviewee (based on Flanagan, 1954). The majority of the interview time was focused on the first two aspects above, recording

information about what participants did and what they were thinking at the time. These elements, along with an understanding of how users feel, help draw out latent needs (Brown, 2009: 40–41). At the end of the interview participants were asked to identify explicit unmet needs by sharing changes they felt could improve their own discovery, evaluation and access experience.

### **Mapping, insights and design questions**

A selection of reported journeys were laid out visually in order to demonstrate the complexity and diversity of discovery and access experiences. These maps chart the seven perspectives identified above and also identify who (e.g. the library, a publisher, a bookseller or a third party) is in contact with the user at each stage of the experience. Visual presentations of these journeys make the links between different stages in the process explicit, while also highlighting where organisations or institutions gain or lose connection with the user.

In addition to the visual maps, specific practices, divergences of behaviour or sources of frustration were pulled out of the interview data. These are reported in the following section and have been used to develop insights about discovery and access processes relevant to all or some participants. A list of design questions, posed from the user, library, publisher or bookseller perspective, was also produced, intended to prompt opportunities for potential enhancements. A number of these opportunities are explored in some detail on pp.39–50.

### **Participants**

The study mapped 30 user journeys taken by eight academics from six UK higher education institutions. Each participant operated within the same humanities discipline (publishing), though their experience and roles differed. Two participants held full-time positions and had entered academia through the established route of completing a PhD. Three were former practitioners with no PhD, who each worked part-time. Three were former practitioners completing their PhDs while working in academia. All but two considered themselves to have multiple focuses (for instance, ‘teaching and research’ or ‘teaching, research and practice’). One considered their prime focus to be teaching, another to be research. Experience levels varied from less than a year in academia to 15 years. The study sample therefore included what might be described as ‘career academics’, who had been schooled in academic practice, and those whose behaviours might have more in common with mature graduate students.

### **Study focus**

In a landscape where researchers are deluged with electronic information in multiple formats, a focus on ‘book’ discovery may seem archaic, yet books still play an important role in humanities research and writing (RIN, n.d; Crossick, 2015: 22). In addition, augmenting the existing literature, which often focuses on accessing journal articles and ebooks through library systems, also opened up the possibility of highlighting additional glitches (and opportunities for improvement) in the system, for instance relating to inspection copy processes, inter-library loans or purchasing from retailers.

## Limitations

As with any research based on interviews, there are a number of aspects that influence the validity of this study. These include respondent bias (where participants who fear or mistrust the questioner may provide inaccurate data), inconsistency (since some interviews may run more effectively than others), interviewer bias (where the interviewer introduces their own interpretation as they document what they hear) and difficulty in analysing unstructured response data (Crowther and Lancaster, 2008: 143–150).

Other researchers investigating scholarly information-seeking experiences have observed that some academics ‘showed off’, claiming they used systems they didn’t, for fear of being shown up in comparison with colleagues (Priestner, 2016). This is unsurprising if ‘feelings of fraudulence’ are, as Ruth Barcan (2014) suggests, a systemic feature of academia. A single project is unlikely to be immune to such an endemic condition. However, the interviewer in this study was known to all participants, which may have reduced the level of fear or mistrust in comparison with an unknown questioner. This, in turn, may have led to more candid responses.

Observer bias is also clear in other studies, particularly at the analysis stage. Some researchers with a librarianship focus blame users’ lack of appropriate skills for the problems they encounter when information seeking. Ignoring the possibility that the system could be improved, their solutions revolve around training or information provision intended to improve the habits of deficient users (see, for instance, Catalano, 2013 and Spezi, 2016). Commercial, customer-focused publishers or academics (the author of this report is both of these) will also bring their own perspectives to the interpretation of the situations reported to them.

The issue of observer bias may prompt suggestions that it would be more appropriate to employ a totally independent observer. However, the process of journey mapping is dependent on the interviewer having knowledge of the procedures being studied (Jacka and Keller, 2009: 87–102). Indeed, where this knowledge is lacking, ethnographic researchers may take deliberate steps to learn what participants are doing in order to gain an emotional understanding of the experience (Hine, 2015: 55). Observer bias may therefore be an occupational hazard associated with the research methodology. Even so, observer bias in data collection may be limited by asking few, and open, questions (Flanagan, 1954), an approach that was followed within the interviews in this study. When it comes to analysis, however, the approach, as discussed above, is intentionally selective.

# Understanding the book discovery, evaluation and access journey

This section shares information about the reported behaviours of the academics interviewed in this study. It is structured in sections that reflect the three key components of each journey – discovery, evaluation and access – and distinguishes between known and unknown item searches and the evaluation of books for personal research vs. books for potential course recommendation. In reality, the demarcated sections below are often blurred, with discovery and evaluation taking place simultaneously, or evaluation taking place both before and after access has been gained. Similarly, some books may be relevant to both research and teaching.

## How do academics discover books?

Several participants indicated that they discover relevant books from bibliographic references in other publications (an approach known as ‘citation chaining’). As one participant pointed out this is a retrospective form of discovery:

**‘I use bibliographies, but that is looking backward. Where am I getting new stuff from?’**

The same lecturer reported sometimes exploring titles in a publisher’s ‘related products’ function, though this could be distracting. Their concern about how to find *new* books was echoed by other participants, some of whom struggled to find appropriate ways to keep up to date, aside from general internet searches:

**‘I sometimes type “books on publishing” into Google.’**

Publishers’ marketing emails were generally appreciated as a useful way to discover new books in the field, though the focus on the publisher’s own titles was acknowledged:

**‘When the books are specific to me it’s quite exciting.’**

**‘Anything that’s relevant to me is interesting.’**

**‘I fear I am missing out, because I’m not on the right [publisher] list ... sometimes books come out of left field.’**

Publisher emails may sometimes remind participants about books they had prior knowledge of, a useful function also delivered by published book reviews and radio publicity.

One participant, who had a research focus, felt they had no difficulty keeping up with new publications:

**‘It’s so easy to discover books because of social media.’**

They described being connected with academics in their field on Twitter and Facebook. They also subscribed to relevant listservs:

**‘Being embedded in the community is joyful ... because you have the authors ... people promoting books ... I trust people’s judgment and value opinions ... I find it really easy to discover books.’**

This element of trust was raised by another participant who wanted ‘a trusted intelligent expert’ to bring interesting books together:

**‘Quality and integrity is important – not relying on services designed by young American men ... like a good intelligent index.’**

In this context, the lack of a campus bookshop, with ‘a great selection’ where one might ‘happen upon some new books’, was a disappointment.

Like bookshops, physical libraries had a limited role in book discovery,

even though participants felt they had the capacity to prove useful. Only one participant, who was new to academia, reported regularly visiting their university library and browsing the shelves to discover books. In a sense, they had transferred their general book discovery methods (browsing in bookshops) to their new academic environment. Another participant acknowledged that they ought to visit the library:

**‘I should just go and look on the bookshelves, but I don’t.’**

One participant, whose own library had limited holdings relevant to their PhD research, visited an alternative university library. They would have searched the online catalogue but did not have access. The necessity of browsing the physical shelves in this institution was ultimately a positive experience, opening up ‘a gateway to a whole new set of content’.

### How do academics locate known items?

Participants searched for known items in three main locations: in their online library catalogue, on a publisher website or on Amazon. The library catalogue was searched with a number of different aims: to check whether a book was available to consult in the physical library, to access a digital copy of a book or to inform whether a purchase request should be sent to the library for a book the participant had already evaluated. One participant, who was new to academia, visited the physical library without searching the catalogue first. Since they had wanted to locate books on the course reading list, they assumed copies would be available and simply browsed the shelves to locate them.

Publisher sites and Amazon were viewed as locations where information about books and sample content could be accessed, enabling the relevance of titles to be evaluated; one participant reported using Google Books in this way too. While Amazon also served as a purchase channel, this function was not used on publisher sites even if the publisher site had been consulted for information about a book.

When searching online, most participants entered the full main title of the work into the search box of whatever site they were on, without checking any filters or using other search options. Two participants also used the author surname and one used the author name alone if they felt it was distinctive enough. Another reported the need to omit ‘the’ from searches in their own library system.

Searching within library catalogues was a source of frustration for several participants, who felt it was difficult to find the item they wanted even if they possessed all the details:

**‘I can never orchestrate a search even though I’ve been trained ... it frustrates me endlessly.’**

Part of the frustration was the number of results returned:

**‘It is so sophisticated it brings me loads of things.’**

**‘I would just like to enter the ISBN.’**

There was also a feeling that some library systems had changed, and not for the better:

**‘It used to be very simple.’**

**‘They keep changing things ... I have to relearn the system.’**

Several participants blamed themselves for the difficulty they experienced

when using the library system:

**'I just need to be better at searching.'**

**'Quite possibly I'm doing something wrong ... I must be missing a trick.'**

Other participants, who were career academics and/or deeply involved in research, felt very differently about their library catalogue:

**'It's fairly user friendly ... I get a nice list of results.'**

**'I'm quite happy – because everything's there.'**

**'It's absolutely excellent. There are holes in the holdings, but it is pretty good to find stuff ... it has got a lot better.'**

It's interesting to note that at least two of those participants who viewed the catalogue positively kept a permanent link to it within a tab on their browser, demonstrating that they used the system regularly. On checking the nature of results from a range of different university libraries, it is also clear that the relevance and clarity of presented search results can vary from institution to institution (see p.39).

Unlike the polarised views on the library catalogue, most participants were satisfied with search functionality on publisher websites:

**'I usually find publisher websites quite good.'**

**'Publisher websites have better search indexes.'**

Plus, when tracking down a new book, the title might even be found on the publisher's home page, negating the need to search any further.

None of the participants raised any concerns or frustrations about Amazon search when tracking down known titles. This suggests that title searches on Amazon, unlike those within library catalogues, deliver on user expectations.

## How do academics locate unknown items?

Unlike known-item searches, exploratory searches for unknown items did not usually involve the library catalogue and often involved consulting several sites at the same time. In general, participants struggled with these searches, again blaming themselves for difficulties in locating the resources they need:

**'I tend to avoid these searches because they are difficult.'**

**'The barrier is me.'**

The lack of academic bookshops made this task more difficult:

**'I very much need to work it out because we don't have an academic bookshop where I can browse ... [Bookshops] add value by collecting and organising effectively, especially if they include backlist – they remind you of things you may have forgotten.'**

More than one participant had asked other academics for guidance when seeking resources in a new area.

One participant started out by visiting the sites of publishers that they considered might have relevant books. They searched on key terms and consulted the top few results that were returned. They admitted that this meant books from some publishers would not be found and also that they were trusting the publishers' search engines to generate appropriate results. The same participant searched in Amazon if they wanted to conduct 'a really wide search', again using keywords or phrases. When browsing the Amazon search results the nature of the cover designs helped them make initial

judgments about whether a book might have an academic focus or not. If so, they might then visit the publisher website to find out more, or their own library catalogue to check if there was a copy available to consult. Another participant ordered their Amazon search results by publication date, since they wanted to locate the most recent items. They made initial judgments about the results based on the title and publisher.

Other participants used Google as well as Amazon, entering key terms or conducting book-related searches such as ‘non-fiction writing best book’. Google was preferred to Google Books at this stage, since participants did not want to add to their workload or limit their searches:

**‘I can’t be bothered to search in Google Books ... overall there are too many places and portals. It should all just be in one place ... I just want one or two options.’**

**‘I prefer ordinary Google because Google Books and Google Scholar narrow things down too much.’**

This participant scrolled ‘super fast’ through their Google search results, looking for ‘interesting’ titles. They were willing to click through 20 or so pages of results if need be, since they didn’t want ‘to close things down’. They considered this a positive experience, since it had the potential ‘to throw interesting things up’.

More than one participant reported difficulties identifying search terms, particularly if they were looking for books within an area they didn’t know well. One tried a variety of different search terms on Amazon, but suggested they ought to have browsed in a specific subject area instead, in order to ‘see where that led’. They also felt the presentation of results in Amazon didn’t help:

**‘The problem with Amazon is that you have to click through to look at the relevance, authorship and the book’s details.’**

In the only reported example of a service provider intercepting a discovery journey, one participant received an email from a publisher just as they were considering how to search in an area that was new to them. The email reminded them about an online resource in their field, which they knew their institution subscribed to. They described this as a ‘bingo moment’:

**‘It took me down another route ... for things I’ll also be interested in later on.’**

The resource enabled them to browse topics in a visual map (see p.41). Once they had found appropriate terms within this tool, they then cut and pasted these keywords into the search function and built up and printed out a list of items they might be interested in. They then searched for these items in their library catalogue.

None of the participants viewed the library catalogue as a tool for discovering unknown items:

**‘There’s no point searching the library catalogue ... it throws up far too much.’**

**‘There’s a danger that people think it’s the whole world, especially when keyword searching.’**

However, several participants did value, and make use of, the *physical* library as a place for discovering unknown items. One participant browsed the library shelves looking for titles that sounded appropriate for teaching.

Another reported their frustration when they were unable to browse the shelves for information about a topic they were covering in class, since they had arrived at the library without their ID card and could not gain access. Since they didn't have time to go back another day, they were forced to access alternative resources online. This switch changed the teaching methodology they had been intending to use, which entailed more work on their part. However, it also broadened the learning opportunity, which they ultimately considered a positive outcome.

One participant didn't see any value in visiting the library to discover new titles, since the books on the shelves were ones they themselves had requested:

**'They only buy stuff we ask them to buy.'**

## How are books for personal use evaluated?

Whether sourcing known or unknown items, participants used a number of different sources to consult information, explore sample content, investigate prices and evaluate books for course recommendation or purchase. Some consulted the description and 'Look Inside' feature on Amazon, others referred to information and sample material provided on publishers' websites. Google Books provided additional sample material for some, while Google Scholar allowed the checking of citations. Amazon Marketplace, Abe Books, Book Depository and eBay all provided opportunities to compare prices.

When evaluating books for their own use, participants sought information to help them make a decision about whether the book was worth buying or ordering through their library. They assessed whether it was worth spending money on and whether it was worth investing their time to read it, by consulting the blurb, table of contents and introduction:

**'I look at the contents list and chapter titles. Will they answer the questions I have? What approach are they taking?'**

**'I'm trying to gauge if the whole book is relevant or just a single chapter.'**

**'How much is relevant to my research? Is it worth spending the time and money? Does it have one single nugget that will make it valuable?'**

Two participants, both currently working towards their PhDs, were concerned with assessing how *significant* a work might be:

**'I search in Google Scholar to see if it has been cited elsewhere. If two or three people have cited it I have to refer to it.'**

**'I don't want to have gaps ... it's about making sure I've squared off my thinking, but it also enriches my thinking.'**

Unlike bookshops, which were perceived as enabling academics to 'evaluate books quickly and easily', websites sometimes offered insufficient information for participants to make a decision:

**'Amazon descriptions are not informative enough given that the book is not in front of you.'**

**'I look at the table of contents, index and body sample on Amazon ... there aren't enough sample pages for me to decide ... I start reading sample pages on Google Books ... the two sites are equally helpful. Together they provide enough information.'**

Price was a key factor for several participants, who sought out low prices on Amazon even if they had gathered their content information at a publisher website. Amazon Marketplace, Abe Books, Book Depository and eBay were also mentioned as purchasing sites that might be consulted in order to find the cheapest price:

**‘I’m really driven by price ... if I can save a fiver I will ... cheap is important to me.’**

**‘I’m hunting price.’**

One participant checked the price on Amazon before evaluating any other information about a title:

**‘I start there because I want to know if I can own it.’**

Despite taking deliberate actions to seek out the lowest price, speed of delivery and quality of the physical copy were also important:

**‘I want “as new”, “dispatched from the UK” at the cheapest price.’**

Several participants expressed guilt about spending money with Amazon:

**‘At just £1 cheaper I should have given the money to [the publisher].’**

**‘The annoying thing about Amazon is that it is so easy ... the price difference [with another online retailer] wasn’t enough to warrant typing stuff in.’**

**‘I feel disappointed with myself, when I could have given someone else my money.’**

This suggests that, in the moment of purchase, the ease and speed of ordering through Amazon has the greatest sway.

## How are books for student use evaluated?

Some participants, who all had a teaching focus, spent more time than others evaluating potential course books. Factors that influenced their decision to obtain a copy of a book included the description on Amazon or a publisher’s website, tables of contents and information about the author and their experience. Reviews, on both Amazon and publisher websites, did not play an important role, with one participant pointing out that they had no idea of their authority or potential bias and would ideally like some sort of ‘independent appraisal’ to be available.

Attitudes to price varied. One participant would not bother looking at a potential course book with a cover price greater than £20, since most of the titles they recommend are secondary reading and they felt a higher price would be prohibitive to students. Another wasn’t concerned about price since they had no expectation that students would actually buy the recommended titles.

Not everyone spent a lot of time evaluating the content at this stage:

**‘I’m asking “Has it got interesting ideas? Who is the author and what is their experience?” I would possibly dip into the content but usually I just know who the author is and make assumptions.’**

Others mapped chapter titles on to the content of a teaching unit or individual lecture, looking for key terms and considering whether the book had the potential to increase students’ knowledge. Several participants evaluated the clarity of the writing, randomly reading sample sections to gauge quality and depth as well as the author’s overall approach and the mix between academic theory and practice. One participant pointed out that they trusted the publisher to have made

appropriate decisions while developing the book; their evaluation focused on the extent to which the book matched their needs, not in evaluating the quality *per se*. However, several participants reported obtaining copies of books that turned out to be disappointing. This might be a symptom of their own rushed evaluation methods:

**'I have assumed books would be a great read after discussing them with the author and then find they are actually not written accessibly and I wouldn't necessarily recommend them.'**

These incidents may also indicate a shortage of sample content for evaluation, since issues with writing style were raised in each of these examples:

**'It sounded really interesting ... when I received a copy it was clear it would not work for teaching ... there are far more accessible M-level publications.'**

**'It sounded good but was quite evangelical ... the content is more elegantly and authoritatively covered in other books.'**

Inspection copy availability and systems were sources of disappointment and frustration for a number of participants. Some were unhappy about not being offered books, or with the steps required to request them:

**'I don't tend to get contacted by publishers. I don't get offered inspection copies even though I have 400 students.'**

**'I feel I have to give blood and an inside leg measurement to get the book.'**

Other participants were unable to obtain samples of books they felt had the potential to be used for teaching purposes. Some encountered titles that were simply not available on inspection; one participant reported having requests declined and also waiting up to five months to receive one title.

Some participants were content to receive either print or e-inspection copies, but one made the point that they would like to evaluate the book in whichever form their students would likely be using, so they might share the same experience. Another wanted to be able to peruse a hard copy if they needed to take 'a good long look' at the content, but were happy to consult an e-copy if they were checking a specific aspect. The digital layout of ebook inspection copies was also important, since participants wanted versions that preserved page numbers, to aid easy citation. In general, the constraints of e-inspection copy provision generated substantial frustration. One lecturer stated that they would reluctantly order an e-inspection copy if it was their only option, but that the publisher system was:

**'... really bad. The books never appear. The publisher is meant to send you a link, but ... it puts me off using them. I don't have time to get that system.'**

Frustrated, but still keen to evaluate potential titles, they had ended up emailing a personal editorial contact at the publisher in order to gain access to the sample copies. Another participant raised concerns about the time constraints imposed by some publishers:

**'I can't bear the electronic ones. The time-limited ones are very irritating. Sometimes I'm thinking of a course a year in advance, or the process of putting together a course may take a year and I may need to go back to the book.'**

Once participants received a copy of a potential course book, their evaluation processes again differed. One participant, who has a research focus, would flick through a book only to consider what material they could extract for use in their lectures. Others continued an evaluation process that had commenced online:

**'I skim the hard copy to check it is sufficiently accessible and informative – by reading bits.'**

**'I'm already fairly confident that the content is right ... I pick certain chapters and check the pace and tone, the pitch between undergrad and postgrad ... I consider how it might work with the scale of students.'**

**'I read sections and chapters ... check for relevance ... ask "Is it well-written? Is it stimulating? How could I incorporate it? How could a student build on it?"'**

This evaluation process isn't simply about deciding whether to adopt the book or not; it also gauges the extent to which a title might be used, which has consequences for the strength of the lecturer's recommendation and the number of copies that will be purchased by the library:

**'I look at the coverage vs. the course. How much do I like it? Is it fundamental or are just a few chapters relevant?'**

## How do academics access academic books?

Once books have been identified and evaluated, academics gain access to the content within them in a variety of ways. They may purchase a copy themselves, recommend purchase to their library, access a print or e-copy through their library, request an inter-library loan or source copies from academic contacts.

Several participants purchased books for their own research or textbooks that they recommended to students. Owning a book was seen as an opportunity to access the knowledge within it whenever required:

**'It's about convenience ... I can access it whenever I want.'**

All reported purchase transactions commenced in Amazon, where participants might also choose to purchase, at a lower price, from Amazon Marketplace. The action of purchasing is tied closely into both discovery and evaluation, with some participants seeking out information about products, searching for low prices and purchasing, often on the same site:

**'You just go.'**

Other bookselling sites, such as Abe Books, Book Depository or eBay were sometimes visited (usually after checking availability and prices on Amazon) in the hope that they might offer a title Amazon didn't, or at a lower price than Amazon Marketplace sellers. None of the participants purchased from a publisher, even if they had used a publisher website to source information about a book or access sample material. Aside from price, participants didn't want to spend time setting up accounts with publishers, when they already held an account with Amazon:

**'At this stage I couldn't be bothered to go back and register with the [publisher].'**

**'I would have had to have an account set up...'**

Some participants decided not to buy a book personally, but were still interested in accessing a copy for further evaluation, or to consult specific sections. They would then order an inspection copy, or ask their library to purchase one or more copies:

**'I wasn't prepared to buy it, but I got an inspection copy so I could compare it to other books.'**

**'I couldn't find it on Amazon or eBay at a good price, so I asked the library to buy it.'**

As discussed above (see p.27), inspection copy systems were a source of frustration for many participants. Library purchase systems, on the other hand, were universally praised, as were library budgets:

**'Our library's fantastic. They get everything you want.'**

**'They send us "we have budget left" emails. I send lists and lists of books. They buy them all.'**

Some libraries used an automatic system, where the academic completes and submits an electronic form to request purchase. Others purchased on the basis of emails received from academics:

**'It takes two minutes to fill in the online form ... it's very rare for a request to be refused.'**

**'I say what I'm going to use it for. They decide how many copies to buy.'**

**'It's a pleasant and personal interaction. They replied to say "I'll get it for you immediately" and said they were going to buy the related volumes too.'**

Some libraries offered alerts to inform participants when a book they had recommended arrived, but many didn't. In these cases, participants tended to chase up the request to find out if the books were available.

Though personal interactions with the library were positive experiences, one participant felt academics did not appreciate librarians and archivists enough:

**'I wish we valued our librarians and archivists for their particular knowledge of their holdings ... we should promote the service they provide ... they provide real economy because they have very, very specific knowledge.'**

Another felt guilty that they didn't make enough use of the physical library:

**'I don't have time to physically go to the library ... it's impossible! But I feel I ought to, because it's part of what researchers do.'**

Attitudes towards digital access varied between participants, but also depended on the nature of the publication and its perceived purpose. None of the participants talked about buying ebooks – every reported purchase was a physical book, either new or second-hand. Three participants had strong preferences for print books, particularly when consulting items for research:

**'Ebooks don't suit the way I research. I've tried e-highlighting but it is too difficult... [an ebook] doesn't sit with my personal research library.'**

**'I don't want an e-copy. I like playing around with my books – underlining, highlighting ... I write on the inside cover all the key page numbers that I need to reference.'**

Conversely, this participant, like others, valued the convenience of ebooks:

**‘It’s instantly available if I want it.’**

**‘The physical copy might not be available [because it has been borrowed]. You can always get hold of an ebook.’**

**‘I wish there were digital versions of all the books. I don’t want to lug books around ... I want to read on the move.’**

The mechanisms used to access ebooks could be problematic, though. One participant described their surprise when, after locating an ebook in their library catalogue, they clicked the ‘view’ option and were sent to a third-party provider. When they downloaded the book onto their Mac, they were unable to open the PDF file in Preview and had to download and install Acrobat Reader in order to view the content. This prompted the comment:

**‘I wish there was a one-click system – from catalogue to screen – in order to view an ebook.’**

In contrast to positive feelings about libraries’ book-purchasing budgets, some participants reported being unable to access particular digital resources since their institution did not subscribe to them:

**‘I’m not sure why, but I hit a wall ... I think we don’t subscribe to parts of [the resource] ... it’s frustrating.’**

This frustration was also evident when some participants struggled to access granular book content. They felt that digital systems should open up the possibility of accessing individual sections or chapters of books but reported difficulty accessing individual chapters of monographs. Compared with the relative ease of obtaining journal articles, this could be a stumbling block in the research process:

**‘When I see a chapter referenced I am immediately disappointed. I know that I will have to get the [whole] book.’**

The same participant indicated that, in this case, they would probably persuade themselves they had sourced enough relevant journal articles. They would either not bother to seek out the book or the task would never be completed:

**‘I think “one day I will track the down the book and photocopy the pages” ... but it is always on the back burner.’**

Another participant had located individual chapters of a monograph on a publisher website but found it ‘way too complicated’, and economically unviable, to access them:

**‘You could see a preview of each chapter. I clicked on one of the chapters that looked good and then clicked through to buy, but I would have had to have an account ... Also, I worked out that a couple of chapters to download would still cost almost as much as the whole book.’**

In the end they bought the entire book on eBay, in good condition, at a ‘bargain’ price.

Participants reported few efforts to source books from beyond their own university library systems. One visited another university library in the same city, because it offered more stock related to their research interest than their own institution. Another searched for an historical title in archive.org and consulted WorldCat to see if the title they needed was available in other

institutions. They then requested it via the inter-library loan (ILL) system, but had limited confidence the order would be successful:

**‘I know inter-library loans can be problematic if it isn’t a British Library request.’**

Three weeks later their librarian contacted them saying they were having trouble obtaining the book and asking if they would like to cancel the request. The academic kept the request open, but ended up visiting a library in another city in order to see a copy. This involved searching the other library’s catalogue for the shelf reference, making contact with the library in advance, registering for a reader’s card when they arrived and navigating their way through the physical library to find the book. Though this was a speedier route than waiting for the book to arrive via ILL, they had limited time to consult the book in the other institution and could not take it away from the library. This was the only ILL experience reported by a participant, perhaps because participants found other ways to obtain books not available in their own environment. For example, two participants, both career academics, used their academic networks to source a physical or digital copy of a book:

**‘If Amazon is very expensive then I’d go to Abe Books or to the ... Society Facebook Group.’**

**‘The publisher didn’t do digital review copies ... I could have got an inter-library loan ... but I emailed a group of friends. One emailed me back a PDF copy.’**

## **Where do discovery, evaluation and access take place?**

All but one participant conducted their searches, online reading and access transactions on a laptop, PC or Mac. Several completed research at home, which sometimes complicated access due to additional authentication steps, while also using their office computers on campus.

One participant used mobile almost exclusively, because it was so ‘quick and easy’:

**‘It’s convenient. My iPhone is in my hand all the time. It works brilliantly.’**

The phone screen size did, however, limit the amount of material they could see at any one time:

**‘The screen is a little bit too small ... I want to see the wider context.’**

None of the participants reported using a tablet in the context of their academic work.

# Insights into book discovery, evaluation and access

These insights are derived from participants' reported behaviours. To a critical eye, a number may appear bold. Some are derived from just one instance of a reported behaviour, others may rely on additional assumptions. This is deliberate. These statements are not intended to act as a summary of accepted, quantitatively robust, knowledge. Rather, they provide a framework of prompts that may aid creative thinking and idea generation around academic book discovery, evaluation and access. Even a behaviour only reported by one participant (or, by extrapolation, experienced by a small proportion of the wider academic community) may prompt an enhancement that could be of benefit to a wider audience.

This isn't to say that further research and evaluation has no role. It is simply that detailed analysis is intentionally being delayed. This is partly to prompt open and unhindered thinking, and partly because, in such a complex, rapidly changing and largely tacit process, some data may never be available or observable. Operating in such an uncertain environment requires an entrepreneurial approach, where ideas may be developed and tested in a rapid, iterative design process (Ries, 2011: 27) rather than being mired in exhaustive analysis.

### Insights: user perspective

- Discovering new titles and receiving copies of books relevant to their teaching or research bring delight to academics.
- Being embedded in an academic community, which shares trusted information and ideas, aids book discovery.
- Academics become aware of titles relevant to their work through citation chaining and keyword searches.
- Academics become aware of *new* titles in their field through listservs, social media and publisher marketing.
- Academics have few opportunities to effectively browse as a means of discovering new titles.
- When academics see published book reviews or receive publisher emails they may be reminded about titles they had previously heard of.
- For known items, academics generally search by full title, whichever platform they are searching within.
- Academics rarely use the filter options offered by search engines when searching for books, though they may consult databases when seeking journal articles.
- Academics with a research focus appear to be satisfied with library search functionality and search results presentation.
- Non-career academics appear to be frustrated by library search functionality and search results presentation.
- Academics appear to trust the results returned by third-party search algorithms, such as those on publisher sites and Amazon.
- Academics evaluate books using information and content from a range of sources (including publishers, Amazon, Google Books, the book itself and citations).
- Academics do not pay a lot of attention to reviews on Amazon or

publisher websites.

- Potential teaching books are evaluated at two stages: prior to ordering an inspection copy and once the copy has been received.
- When evaluating teaching resources, academics assess the content coverage, overall approach and writing style.
- Academics map the contents of potential teaching books against the content of their course, looking for specific keywords.
- Academics read samples to assess the tone, pace and style of potential teaching books, considering how they will be received by students.
- When evaluating research resources, academics assess the significance of the work through citations, author reputation and overall approach.
- Academics use the contents list, blurb and sample material to gauge the extent to which a research book will be useful.
- Academics are disappointed when a book they discovered, ordered and evaluated doesn't live up to their expectations.
- Academics will purchase course books and research books for their own use if the price is sufficiently low.
- Academics purchase books from sites like Amazon, Amazon Marketplace, Abe Books, Book Depository and eBay.
- Academics will shop around in order to find books at the cheapest prices, including ordering second-hand copies.
- Academics will use the purchasing option that provides the quickest and easiest experience, in tandem with a low price.
- Academics will ask their university library to order books if they are too expensive, or not relevant enough, for their own purchase.
- If content is not easily available online, academics are likely not to use, purchase or recommend it.
- Academics would read or recommend individual chapters of e-monographs if they were as easily accessible as journal articles.
- Owning a physical book is valued as an opportunity to easily access the knowledge contained within it, *whenever* required.
- The opportunity to access digital books is valued as a way to easily access the knowledge contained within them, *wherever* required.

### Insights: library perspective

- Academics' interactions with online library catalogues rarely prompt positive emotions.
- Positive emotions are experienced when there is personal interaction between academics and library staff.
- Academics do not view the library catalogue as a starting point for discovering unknown items.
- Library catalogue search functionality does not match academics' expectations, which are influenced by Google and other third-party search tools.
- The number of 'irrelevant' results returned in a library search for a known item can be a source of frustration.

- Academics blame themselves for not being able to search library systems effectively.
- Training appears to be ineffective in enhancing academics' search skills.
- The development of academics' search skills is hindered by differences between different library systems and ongoing changes to library systems.
- Academics make limited use of the physical library.
- If content is not available in their own library, academics are unlikely to travel to other locations or request an inter-library loan.
- Inter-library loan processes can be a source of frustration.
- Encountering content that cannot then be accessed, because the library does not subscribe, can be a source of frustration.
- Access mechanisms for ebooks can be a source of frustration.
- Academics value the knowledge and expertise of library staff.
- Academics value the budgets that enable libraries to purchase every book they recommend.
- Libraries do not always have systems for informing academics when newly purchased books become available on the shelves.
- Academics will chase the library in order to find out if books they recommended for purchase have arrived.

### Insights: publisher perspective

- Academics value emails from publishers that share information about new titles relevant to their fields of interest.
- Academics use publisher websites to discover unknown titles and evaluate known titles.
- Academics trust and value the search functionality offered by publisher websites.
- Academics are frustrated when a title they wish to evaluate as a teaching text is not available as an inspection copy.
- The processes required in order to obtain an inspection copy can be a source of frustration.
- Time-limited ebook inspection copies can be a source of frustration.
- Academics desire a greater element of trust between publishers and themselves.
- Academics do not purchase direct from publishers.
- Publishers who are new to a subject area may not be visible within the academic discovery, evaluation and access journey.

### Insights: bookseller perspective

- Aside from Amazon, booksellers play a minor role in the academic discovery, evaluation and access journey.
- Academics lament the loss of academic bookshops, as a trusted place for unknown book discovery and evaluation.
- Academics do not purchase from traditional or academic booksellers.

**Opportunities  
to enhance book  
discovery,  
evaluation  
and access**

These opportunities for enhancing academic book discovery, evaluation and access processes are directly prompted by the preceding insights. Instead of viewing the opportunities as findings or ‘answers’ to a research problem, they have been presented as questions. Asking the right questions, rather than finding the right answers, can help to identify problems where none have been seen before and lead to innovative developments in thinking and practice (Koestler, 1975: 126). Specifically, each opportunity is phrased as a ‘how might...?’ query, a generative design question that has multiple known answers and multiple unknown answers. These questions preserve ambiguity, leaving open the possibility of generating new answers (Dym et al., 2005).

Like the insights, these opportunities are presented from four different perspectives, to encourage diverse potential solutions to the same challenges.

## Opportunities: user perspective

### How might the discovery of academic books be enhanced?

- How might searching for known items be enhanced?
  - How might library catalogue search functionality deliver on user expectations?
  - How might search be effectively delivered outside the library?
- How might discovering unknown items be improved?
  - How might academics be provided with opportunities to effectively browse books and book content?
  - How might academics be supported when searching for resources in areas beyond their expertise?
  - How might the book-related information informally shared by academics be captured and disseminated more widely?

### How might the evaluation of academic books be enhanced?

- How might academics be provided with sufficient information and access to enable them to easily evaluate books for purchase or course recommendation?
  - How might academics be able to access sufficient content without visiting several websites?
  - How might information about academic books be more effectively shared between academics?
  - How might the inspection copy process be improved?
- How might academics become closer partners with publishers?

### How might access to academic books be enhanced?

- How might readers gain more effective access to titles not available in their own library?
- How might readers easily access granular content?

## Opportunities: library perspective

- How might academic libraries reduce academics’ frustration?
- How might academic libraries increase academics’ delight?

- How might library search deliver on user expectations?
  - How might libraries align catalogue search results with academics' preferred search methods and search result expectations?
  - How might libraries provide an intuitive, Google-like search experience?
- How might libraries support academics' search strategies?
- How might libraries facilitate more effective access to off-site resources?
  - How might libraries deliver a quicker, more reliable and cost-effective inter-library loan system?

### Opportunities: publisher perspective

- How might publishers reduce academics' frustration?
- How might publishers increase academics' delight?
- How might publishers streamline the process of evaluating books prior to recommendation or purchase?
  - How might publishers streamline inspection copy processes?
  - How might publishers redefine their relationship with academics?
- How might publishers enhance discovery and access of individual book chapters?
- How might publishers maximise discoverability of their own titles?
- How might smaller publishers become visible in the discovery environment?
- How might publishers maximise their potential touchpoints with academics?
  - How might publishers increase the number of touchpoints within academics' workflow?
  - How might publishers collaborate with libraries or traditional booksellers to retain academics during their discovery and access journey?
- How might publishers offer academics a simple and affordable purchasing experience?
- How might publishers play an active role in ZMOT?

### Opportunities: bookseller perspective

- How might booksellers reduce academics' frustration?
- How might booksellers increase academics' delight?
- How might booksellers play an active role in academic book discovery?
- How might booksellers play an active role in ZMOT?

The discussion on the following pages explores a selection of these opportunities, drawing on wider literature and practice to consider possible user-focused innovations. The selected issues are areas where new thinking has the potential to reduce user frustration or where there may be opportunities

for industry players to enhance their roles in the discovery and access ecosystem. The chosen topics should not be interpreted as more significant or impactful than other opportunities listed above.

## Exploring library opportunities

### How might library search deliver on user expectations?

Study participants who had not entered academia through traditional routes experienced high levels of frustration when they searched for known items in institutional library catalogues. They blamed themselves for poor search strategies and were disappointed by what they perceived as lists of irrelevant search results.

From a systems perspective these participants' reactions are unsurprising. Query-based online catalogues were designed for expert librarians, searchers who are able to reconceptualise resource needs as effective and precise search strategies (Borgman, 1996). This need for specificity makes catalogues appear complicated and inflexible to other end users (Gessner and Wilcox, 2011), who falsely believe library systems work like Google, complete with expectations of auto-completion, spell checking and 'did you mean?' functionality. Regular Google users also expect the most relevant items in a query-based search to be listed at the top of a results screen, which isn't how classic catalogue algorithms work (Christensen, 2013). At a more fundamental level, keyword search interfaces are 'ungenerous', an approach that 'demands queries, discourages exploration, and withholds more than it provides' (Whitelaw, 2015).

Confusion, uncertainty and a sense of being overwhelmed are all common feelings during online information seeking, particularly if users find it difficult to precisely express their information needs or encounter conflicting information (Kalbach, 2007). When users then encounter unexpected and overwhelming results screens frustration is a natural response (Teague Rector and Ghaphery, 2008). This frustration may turn to anxiety when faced with the need to discern between multiple options in these long, unfocused (Asher et al., 2013).

There could be several routes to improving this situation, including training users to help them use catalogues more effectively, ranking and categorising search results in line with user expectations, providing search support and guidance within the catalogue and developing more user-friendly search and results interfaces. Feedback from participants in this study suggests that training is ineffective, since at least two participants had attended recent sessions and still struggled to use institutional systems. At a more conceptual level, training prioritises the system (shaping academics to use it effectively) rather than the user (shaping the system to satisfy their needs). When information resources were scarce and could only be accessed in physical locations, academics had little choice but to build their workflow around their university library. Today's users, however, expect services to be built around them and their needs (Dempsey, 2012). Contemporary online catalogues ought to, therefore, *assist* searchers, rather than attempting to re-program them (Borgman, 1996). Even if user needs aren't fully addressed, designing easy

**'Searchers must translate their information needs into a description of the information sought'**

Christine L. Borgman

to use and ‘likeable’ interfaces, such as virtual shelf-browsing and graphical representations of topics or results, could help counteract user frustration (Christensen, 2013).

Assessing the systems rather than the users, a comparison of search results returned by a number of library catalogues, including those at each study participant’s institution, was completed in order to provide an additional perspective on this issue. Typing the main title of a key text in the study participants’ academic field into each catalogue’s search box led to varied results. Three catalogues returned thousands of results, with entries relating to the book appearing at the first, second and sixth (below the scroll line) positions respectively. In two of these instances, the entry was only a parent descriptor, meaning users had to click through to access separate individual entries and availability information. Two catalogues returned ten or less results, with the book appearing at the top of each results list. What might be interpreted as the most useful result provided shelf locations, due dates and user ratings within each result listing, without requiring additional clicks.

Looking further afield, US university libraries at institutions like Stanford, Cornell and North Carolina State University (NCSU) have markedly more ‘friendly’ results pages. Each presents search results in ‘bento box’ screens, where resources appear in different modules, clearly sub-divided into, for instance, books, articles and databases; each of these catalogues returned the sought title as the first result in its list of book items. Hennepin County Library in Minnesota takes the results screen a step further. Its catalogue returns the book in the number one spot, while also providing a large image of the cover, the number of copies available, a user rating and the blurb, all without having to click off the results page. Like Leibniz’s imagined index of titles (see p.10), the inclusion of the blurb is likely to aid in both discovery *and* evaluation, since users may be able to gauge whether a book is of value, even while scrolling through a results page. Unfortunately, none of these user-focused approaches to search and the presentation of search results are offered by study participants’ libraries.

### **How might libraries support academics’ search strategies?**

The action of searching isn’t just about seeking out a specific item. Sometimes it serves the purpose of refining users’ thinking, directing their research and identifying future search terms (Borgman, 1996). This was clearly the case for some of the study participants when they searched for unknown titles in fields they did not know well. In these situations, they could have been supported by catalogues that did not insist on closing down a search at the start of the process, or by systems that provided opportunities for users to ‘branch out’ and explore suggested options (Dempsey, 2012).

Such support can be offered at the point of search or on an individual book or topic screen. NCSU Libraries delivers both, providing suggested search terms as the user types within the search box (Lown et al., 2013) and offering a ‘browse shelf’ option from individual book entries, where related titles, which may be shown as covers or bibliographic lists, may be explored. One of the libraries used by two participants in this study offers a similar cover-based ‘virtual browse’ option, which provides an opportunity to expand search from

within a title's catalogue entry. However, this option is not an obvious feature on screen and neither participant seemed aware of the tool.

As part of its 'What's in the Library?' prototyping project with developers Good, Form & Spectacle (available at [whatsinthelibrary.com](http://whatsinthelibrary.com)) the Wellcome Library in London has experimented with visual browsing like this on a catalogue subject page. The page provides a definition of the key term, a graphic representing the number of relevant items held in the library, links to creators of works on the topic and links to digitised 'things' on the topic. More relevant in this context, the page also provides two collections of clickable tags that act as suggested search terms. One, titled 'Often Seen With', comprises synonyms and related terms. The other, 'Go More Specific', offers deeper dives into subtopics. A similar approach to browsing through topics is used by the Centre for Australian Art's Australian Prints and Printmaking's 'subject explorer' (available at [printsandprintmaking.gov.au/explore/subjects-explorer](http://printsandprintmaking.gov.au/explore/subjects-explorer)).

One of the early design inspirations for 'What's in the Library?' was a trip to the stacks within the physical Wellcome Library archive. This prompted a desire to digitally represent the physical clues a reader gathers as they scan along a shelf of book spines (Roberto, 2015). Another prototype project, Harvard Library Innovation Lab's 'StackLife', lets users digitally browse virtual spines of all Harvard Libraries' holdings 'on a single shelf' (Harvard University, n.d.). Users may scroll through subject-specific digital stacks to find relevant titles, or click on a title to open up an individual title record that may be linked with other subject stacks. StackLife provides multiple contexts for individual records, representing the level of usage of each book by colour and allowing users to add descriptive tags that are visible to others.

The Wellcome Library, Centre for Australian Art and Harvard Library examples all make the categorisation of content and the links between different subjects explicit. This subject-exploration approach is also taken by the visual map used by one publisher (see p.42). At the other extreme, mosaic-type browsing interfaces work on similar principles, but prioritise visual interfaces in order to share large amounts of material in pages that may be rapidly scrolled. Examples include the New York Public Library's visualisation of digitised items, the Walker Art Center's browsable collections site and the Manly Local Studies Image Library (see p.49).

All these examples of innovative approaches to library interfaces and catalogue functionality have the potential to aid search, browse and discovery. However, the most innovative approach to supporting – instead of reprogramming – academics' discovery processes is probably that employed by Utrecht University Library, which believes academic libraries have lost their discovery role. At a time when more discovery than ever before is 'routed around rather than through' the library (Schonfeld, 2014), the Dutch university has switched off its journal discovery tool, with no negative consequences. Focusing on adding value to users in other ways, Utrecht has shared information with the most commonly used article discovery tool, Google Scholar, so the third-party has knowledge of what journals Utrecht users may access. Utrecht intends to follow a similar process with its book catalogue and is 'looking towards' WorldCat as a suitable external discovery

**‘In the world we live in today, you should not encourage your users to start their search in a local library catalogue.’**

Simone Kortekaas and  
Bianca Kramer

tool (Kortekaas and Kramer, 2014). This radical move accepts and supports users’ behaviour rather than trying to change it. In doing so, Utrecht poses a dilemma for other libraries: should they attempt to improve catalogue functionality or focus instead on streamlining delivery of items that are discovered beyond the library?

## Exploring publisher opportunities

### How might publishers maximise discoverability?

Given the varied routes by which academics discover books, publishers ought to ensure their titles are findable in multiple locations through varied search strategies. At a minimum, ensuring books are findable by title searches in library catalogues, Amazon and Google Books is key. However, the importance of providing detailed information and content on publishers’ own websites – at least for the perhaps biased participants in this study – should not be overlooked. Developing sophisticated search and browse mechanisms for publisher sites would also enhance the experience of academics seeking unknown resources, particularly if they are not deeply familiar with a field. Beyond the publisher website, transformational metadata offers the possibility of maximising discoverability when users are not deliberately searching or browsing.

Most publishers allow users to explore products gathered together within subject-based sections on their websites. This narrows the number of publications offered to the browsing user but does little to guide them through a subject area. Laing and Royle (2013), writing in the context of online retailers, suggest a more serendipitous offering might be delivered by displaying the spines of books on visual bookshelves or the covers of books on themed ‘tables’, mimicking physical in-store displays. These solutions (see p.41 and p.49) may encourage online browsing but they don’t necessarily don’t add value to academics’ search strategies. In this context, the ‘Methods Map’ offered within the online subscription product SAGE Research Methods (SRM, available at [srmo.sagepub.com](http://srmo.sagepub.com)) is an example of a useful device that helps users search and browse, while also *guiding* the search itself. Developed as a resource to drive researchers to content housed within this specific product, such a tool has wider potential. Two features in particular stand out: a multi-dimensional search engine and the ability to switch between browsing and searching.

Entering a word or phrase into SRM’s search box leads the user to a list of books and other resources, but also provides information about, and synonyms of, the search term itself. Additional clickable search terms are provided, which allow users to broaden or narrow their search, or to explore related subject areas. Like Wellcome Library’s ‘What’s in the Library?’ prototype (see p.41), this moves beyond the ‘related titles’ or ‘customers also bought...’ product links familiar from both publisher and bookseller websites, to offer related searches. This approach has been identified by librarian and consultant Stephen Abram (2013) as a future norm for search engines.

SRM also allows users to switch between searching and browsing, applying knowledge gained during one activity within the other in order to

find the information and products they need. This led one participant in this study to locate a number of useful books in a relatively short time, while also understanding where the topic they were exploring sat in ‘the bigger picture’ of the subject. Like John Evelyn and his seventeenth-century auction catalogues (see p.9), this is an example of a tool designed for one purpose being used as a dedicated discovery tool, an academic practice publishers could exploit and respond to.

Looking beyond publisher websites, search engine optimisation (SEO) for books has been identified as ‘the single most important skill for a publisher today’, since the more ‘information about a book’ (or metadata) that is discoverable by search engines, the greater market access (Danet, 2014). This has implications for product development, since it naturally suggests that titles, chapter titles and indexes ought to be optimised as much as marketing blurbs.

**‘Fanciful titles  
are invariably a  
mistake’**

Stanley Unwin

The importance of choosing a title that accurately describes the content of a book is nothing new (Unwin, 1926: 319), but the wording has even greater consequence in a landscape where scholars search a number of sites using specific phrases relevant to their teaching and research. This raises an important issue about who creates metadata, since publishing staff may have less insight about how to describe a product to make it findable than the academics who are searching for it. Morris et al. (2013: 183) recommend devoting ‘expert’ attention to identifying terms (including synonyms) on which readers might search, something leading self-publishers are acutely aware of (Faherty, 2013). Now that the ability to index the entire content of a book in Google Books has opened up new discovery channels (Schnittman, 2008) one might even question how internal content should be developed from an editorial perspective, in order to maximise findability.

Effective SEO ought to present relevant books when users search for them or their authors but metadata may also be employed in other ways. It has the ability not just to describe a piece of content, but to change perceptions of it, to the extent that ‘information about [publishers’] content is going to be more important than the content’ itself (Solomon, 2009). This ability to provide additional context and interpretation could help plug the gap created by a lack of academic bookshops, or mirror some of the discussion and sharing that takes place within academic communities. If the metadata for a book record contained links to reviews, connected to content that might enhance the book (even if it is published by someone else), collected reading or usage data and incorporated user-generated content or metadata, books might become findable even when people weren’t specifically searching for them. Books could surface within discussions about topics related to the product’s content or via other books and content.

As one participant suggested, digital content has the potential to offer the added value of:

**‘taking you into different areas and pointing you to different areas of research.’**

Some journals offer this functionality, where a reader may click on a reference and be taken to a digital copy of the source, but this is not often seen in ebooks, despite the prevalence of citation chaining by both academics and

students. In this context, publishers could also enhance discoverability by making it as simple as possible to accurately cite and share information about their publications (Chowcat et al., 2014). When it comes to digital products, the approach taken by the Paul Mellon Centre for Studies in British Art and the Yale Center for British Art in their online journal *British Art Studies* provides an exemplar: each chapter, paragraph and figure has its own, never-changing, DOI in order to assist academic citation (Paul Mellon Centre, 2015).

### How might publishers streamline inspection copy processes?

Study participants raised a number of issues relating to inspection copy processes, including titles that weren't available on inspection, declined inspection copy requests and data requests perceived as over-demanding. The issue that appeared to prompt the greatest frustration was e-inspection copy access processes. These have been shown to involve up to 25 separate online steps and may require installing specialist programs (Faherty, 2012). The time limits that take little consideration of when a lecturer designs their course may also prevent effective collaboration with teaching colleagues or the extent to which books may be consulted while delivering a course.

If the key aim of textbook publishers' marketing efforts is to deliver sample copies of new books 'into the academic's hand' (Baverstock, 2015: 389) it is clear that publishers are not always achieving their goals. Indeed, the situations described in the paragraph above lead to dead ends for both the academic (who does not evaluate the title for adoption) and the publisher (who loses the possibility of a potential course recommendation).

Frustrated academics also have a desire to be seen as collaborative partners, rather than people whose behaviour needs to be policed:

**'Either trust me or why not give me one free book? I'd like to be recognised as a partner by publishers, someone who's not out to abuse the system ... It's about convenience, not about me stealing people's books.'**

An improved partnership might encourage academics to spend time providing title feedback and endorsements on the books they evaluate. While some participants were happy to do this (a view that may be influenced by their own former lives as publishers), one participant was concerned that their feedback provided to one publisher had been used to tacitly blacklist them for future samples. After responding more than once that an inspection copy was unsuitable for their course, their future requests had been declined.

There is no doubt that commercial priorities require an appropriate balance between giving away free copies of books and sufficiently seeding the market for adoptions. Yet it is clear that current systems prevent some potential adoptions, while also acting as a source of annoyance. Making more titles available on inspection, accepting a greater number of inspection copy requests, allowing academics to choose either print or e-versions, streamlining the ebook access process and removing access time limits would all improve the user experience and build goodwill. Publishers could also consider ways in which they might develop stronger personal relationships with lecturers, to create lasting collaborative partnerships around teaching and learning rather than combative stand-offs around access to products.

## How might publishers enhance discovery and access of chapters?

Researchers see great opportunities in being able to access monograph research material digitally (Hall, 2013: 69), yet chapters in multi-authored books are difficult to discover, evaluate and access. Unlike databases for finding journal articles, there is no index of monograph chapters (RIN, 2006: 10) and study participants reported that gaining access to individual chapters was both time-consuming and uneconomic.

For researchers, these issues are particularly frustrating, since, in many respects, a single chapter has much in common with a journal article. If they can find, preview and access an e-journal article for free (to them) through their university library portal, it seems strange that they can't do the same for chapters in ebooks:

**'Chapters in multiple-authored books [are] hard to locate. There is no index to such works, and they cannot be searched as they are not generally available in full text online.'**

Research Information

Network

**'Ideally, I'd like it to work like a journal, so whole chapters were easily available for academics and students and I could find [them] like a journal article ... in an integrated system.'**

At a time when boundaries are breaking down between the editorial concepts of journal papers and books (McCall and Bourke-White, 2016), separate discovery and delivery mechanisms for the two formats feels increasingly anachronistic. Writing in the context of library provision, Springer (2008: 2) suggests that viewing ebooks in a different vein to 'traditional' print book models might open up opportunities to enhance the user experience. The same could easily be said of publishers. In the example shared by one participant, the pricing of the ebook (£50) was only 20 per cent less than the hardback print book (£60). Each of the twelve chapters was then available in digital form for half of the overall ebook price (£24). While this may ensure the publisher and authors secure sufficient recompense, it makes little sense to the purchaser, especially in this case, as they ultimately managed to acquire the entire print book for just £6. This resulted in zero recompense to the author or publisher, since the participant purchased a second-hand copy.

At the very least, appropriate chapter metadata should allow these individual pieces to be discoverable. Online previews would also help academics evaluate material, while pricing mechanisms that made more sense in relation to the entire book might prompt individual purchases. In the long term, academics and students alike are more likely to find, use and recommend this material if, like a journal article, it is discoverable as a stand-alone item within a library database.

## How might publishers play an active role in ZMOT?

The discovery, evaluation and access journeys reported in this study demonstrate that ZMOT commences in three locations: when an academic locates a title and samples its content on Amazon, when an academic locates a title and samples its content on a publisher website or when an academic locates a title and reads sections of it on Google Books. In all three scenarios, purchase ultimately takes place on Amazon, indicating that the online bookseller is 'winning' ZMOT, even when a potential purchaser has spent time on a publisher's website as part of their evaluative research.

The most obvious reason for this is price but publishers have also conceded some or all of the evaluation stage to third parties. This is because the

information academics need in order to evaluate books is generally housed not on publishers' sites, but on Amazon and Google.

Participants in this study wanted to consult information about the content of a book, the approach it takes to the subject, its significance (which might be gauged by information about the author and if and where it has been cited) and the writing style. Looking at the catalogue entries of three key titles in the participants' field on three different publisher websites highlights the difficulties in obtaining this information. Two major publishers provide no information about the authors, a listing of chapter titles (but no more detailed contents information), a blurb that says very little about the book's approach (and features few terms that would match academics' keywords), reviews that provide little useful comment and no access to sample material. In one instance all this information is housed in different 'tabs' on a site, requiring several clicks to access it. The third publisher provided a detailed contents list and a pop-up link to content on Google Books, an approach that could keep browsers on the site rather than losing them to Google. All this material was, once again, only accessible after several clicks. Amazon or Google Books, however, provided easy access to detailed contents lists for these books, as well as access to the actual content within the books and their indexes.

Publishers index book content and place it in locations where it can be most easily discovered (Schnittman, 2008), viewing Amazon's 'Look Inside' and Google Books as online 'shop windows', locations for readers 'to discover [...] books, find out more about them and encourage them to buy' (Thompson, 2010: 329). This approach mirrors the pre-digital scenario where publishers produced and marketed books but customers first encountered and evaluated their products (an event known as the 'first moment of truth') in a physical bookshop. Today publishers have, in theory, the ability to choose to sell directly to potential purchasers, or at the very least the ability to control the evaluation of their own products, by providing sufficient information at ZMOT. Instead they are encouraging (whether deliberately or not) customers to find, evaluate and purchase their books through one channel: Amazon.

It could be argued that publishers are simply content producers, with no role in discovery, evaluation or access, yet the current buzz around 'curation' as a value-add that could be delivered by publishers suggests this isn't a limitation publishers subscribe to (Crotty, 2015). Curation activities could boost discoverability and may, if done well, provide a substitute for trusted academic networks or serendipitous book discovery. They won't, however, prevent a customer who has discovered a book in a curated (or otherwise) selection on a publisher website from transferring to Amazon in order to complete their purchase. Participants in this study chose to use Amazon, even when wracked with guilt about their decision, for two reasons: they believe it will offer the best price and they know they can purchase with one click. If publishers want to win business away from Amazon, they must compete on both these issues.

Competing on price is undoubtedly problematic. Offering Amazon-type discounts direct to consumers could be seen as an action that undermines the perceived value of the book, something authors and editorial staff may be particularly concerned by. Sales teams may also worry that such a strategy

will cause frictions with other booksellers, who may feel the publisher is locking them out of the supply chain. In reality, this is probably not the case, since, at least in terms of the participants in this study, they have already been locked out of the supply chain by Amazon. If these relationships are important to publishers, a more productive strategy might be to build partnerships with booksellers in order to jointly offer low price deals in competition with Amazon. Their notional margins would drop, but they might retain customers and win new business.

Competing on the purchasing experience may be less contentious and easier to implement, particularly if there was an opportunity for consumers to use the same login details across several publishers, or publishers and retailers – since the need to register and remember passwords is one of the obstacles to purchasing through publisher sites:

**‘I have never [set up an account with a publisher] because otherwise I’d need a lot of accounts and bloody passwords with about four different publishers.’**

In fact, Schonfeld (2015c) points out that consumers have shared ‘far more personal information with Facebook, Twitter, or Mendeley, or through a user account with Google’ than with publishers. This leads to what Schonfeld describes as ‘grab and go’ behaviour, where consumers land on a publisher’s website, obtain the information they need and then disappear again.

Constructing a compelling reason to collect consumers’ personal and payment details could be a first step to removing this barrier. If many of the participants in this study already had an account with a publisher, and knew they could obtain the book via the publisher’s website at a competitive price, they might remain on the site to complete their purchase after consulting the title information and sample content. They would be even more likely to do so, if they had an emotional relationship with the publisher, rather than the loveless exchange of data some participants bemoaned. A key question for publishers, therefore, along with whether or not they view themselves as a sales portal, is whether they have the capacity to build closer relationships with academic customers. The concerns expressed in the above discussion about inspection copy processes suggest this may not currently be the case.

Of course, publishers may be happy to cede sales to Amazon but, if this is the case, one might question why they don’t make users’ lives easier by linking directly to their titles on the bookseller’s site, as many trade publishers do. This may have the additional benefit of generating affiliate sales revenue. If publishers would prefer to direct readers to a wider range of sellers, they could consider pulling in live pricing information from sales sites (as bookbutler.co.uk does), therefore removing the need for consumers to visit other sites to make their purchasing decision and effectively controlling ZMOT, even if they don’t make the final sale.

## Exploring bookseller opportunities

### How might booksellers play an active role in discovery?

Participants in this study indicated that the ability to browse through a trusted collection of books in a single location, where titles may be easily consulted

and evaluated, is both rare and missed. While such services could be offered in multiple ways, the concept of a traditional physical bookshop has four potential benefits over the options currently available to academics:

- **Browsing:** unlike most library, publisher and online bookseller catalogues, physical bookshops provide an environment conducive to rapid browsing.
- **Breadth of offer:** unlike a publisher-curated collection, bookshops combine titles from many providers in a single location, with the aim of assisting the browser rather than promoting specific titles. Bookshops may also contain backlist and second-hand titles.
- **Trusted choices:** unlike a bibliography or other third-party list of relevant books, bookshops offer a continually updated selection, incorporating new books as they are published. Academics trust their selection and expect their offer to be up to date.
- **Unrestricted access:** unlike Amazon, Google Books and publishers' own websites, physical bookshops offer unfettered access to the entire book (at least while the customer is within the bookshop), so an academic may quickly and easily consult whichever sections are most relevant to them and explore as much of the book as they need in order to make a decision about obtaining it.

These factors may be why some describe academic bookshops as a key resource (Dadds, 2016) even while stores are closing around them (Johns, 2016; Marsh, 2015). Yet resurrecting physical bookshops is unlikely to be the panacea for this missing link in the discovery and access journey. Convenience and efficiency are now key (Gessner and Wilcox, 2011). If academics don't have time to visit the physical libraries on their doorstep (despite appreciating the value they offer), it seems unlikely they would find time to visit a physical bookshop, however wistful they are about the experience.

Digital solutions offer the speed and anytime–anywhere access academics crave, but this comes at the cost of lessening academics' ability to consult trusted expert sources and evaluate books in the way that most suits them. As discussed above, publishers who curate their content may aid discovery of their own titles, but, like the sales catalogues of early printers (see p.11), this will do little to help academics whose needs may be more effectively met with books produced by other companies. Curated publisher collections will not improve the evaluation experience either, at least not without further improvements (see p.46). Digital has shifted pre-purchase access limitations from location (which was once in the bookshop) to amount of content or period of time. These new limitations are purely *publisher* constructs, designed to protect their content rather than responding to academics' needs.

This suggests there may be a potential opportunity for bookshops to do digitally what they historically did in store: gather titles together in a manner that truly helps academics and offer a less restrictive method of evaluating titles prior to purchase. This would require moving away from Amazon-esque 'you may also be interested in...' algorithmic links to a more subject-linked search and browse experience. The 'virtual shelves' and suggested search

**'Efficiency is paramount for researchers; we heard from a number of respondents who perceived the need to visit the library as a "time waster"'**

Gabriela Castro  
Gessner and  
Wendy Wilcox

mechanisms developed by some academic libraries and the SRM subject map could all be useful sources of inspiration here (see p.40–42) as might experimental browsing interfaces such as the New York Public Library’s visualisation of over 187 000 digital items (available at [publicdomain.nypl.org/pd-visualization/](http://publicdomain.nypl.org/pd-visualization/)) or the Manly Local Studies Image Library (available at [mtchl.net/manleyimages](http://mtchl.net/manleyimages)). Both visual interfaces allow exploration by a number of themes, including period of time, while the Manly site also incorporates changing images, offering visitors the opportunity to ‘drift’ passively as much as browse actively (Whitelaw, 2015). A similar, but static, browsable ‘mosaic’ interface is offered by the Walker Art Center (viewable at [walkerart.org/collections/browse](http://walkerart.org/collections/browse)), which also makes use of infinite scroll to present a never-ending experience. This use of scrolling aligns with other online behaviours: scrolling through social media platforms, news sites and search results. This is a strong contrast to the click-based interfaces offered by publisher websites (see p.46).

Amid claims that the ‘serendipity’ offered by bookshop browsing can never be replicated (Dalrymple, 2012), it is important to understand that digital interfaces designed for serendipitous discovery should not simply present random data, since online audiences rarely engage with pure randomness (Coburn, 2016); such interfaces could even respond to browser behaviour, offering more ‘similar’ titles if a user scrolls slowly and explores certain titles, or alternative offerings if they rush through a screen of options (Coburn, *ibid.*).

As for helping academics evaluate titles, this will only be possible by partnering with publishers in some way. While it seems unlikely that it would be possible to produce a digital experience that allowed academics to evaluate as much of the book as they would like (as they once did in a physical bookshop), such a solution would align with how academics evaluate books for purchase or adoption.

### **How might booksellers play an active role in ZMOT?**

When it comes to ZMOT, traditional booksellers face an even greater challenge than publishers, who at least feature in some academics’ decision-making processes. The participants in this study used Amazon to access book content and Amazon Marketplace, Abe Books, Book Depository and eBay to investigate prices. Other booksellers did not feature. This is unsurprising given that their catalogue pages do not appear high up in Google title searches (unlike Amazon, publishers and Google Books), there is no option for academics to consult the content within their books and no option to purchase from resellers. Like libraries, this poses the question of whether booksellers ought to spend time trying to reclaim a role in discovery and evaluation, or if they should focus their efforts in other areas.

Booksellers are only likely to be able to establish a role in this moment if they work with publishers to gain access to content that may be evaluated pre-purchase. And, like publishers, booksellers are only likely to be able to ‘win’ ZMOT if they offer a quick and seamless purchase experience, consistently low prices and have already acquired customers details.

Two major US booksellers provide an interesting counterpoint to the role of bookshops observed in this study. Barnes & Noble Faculty Enlight (available

at [facultyenlight.com](http://facultyenlight.com)) and Follet Discover (available at [follet.com/discover](http://follet.com/discover)) are online tools designed to help academics search for and adopt textbooks. Once faculty have signed up they may request inspection copies, compare prices and formats and confirm and manage adoptions. The systems link to their institution's virtual learning environment and their campus bookstore. Barnes & Noble developed Faculty Enlight after surveying and interviewing academics and claim over 11 000 faculty registered for the site in its first eight months (Barnes & Noble, 2013).

Both sites focus more on searching for known items than browsing for unknown ones or evaluating titles, though they do enable lecturers to see what textbooks are being recommended on other programmes. These systems might, therefore, not own ZMOT as a whole. However, the ability to compare prices, along with an emphasis on 'ease of use' and a system that integrates with academics' existing workflows, suggest they may be winning it, at least in terms of textbook adoption journeys.

# Key themes

Mapping the discovery, evaluation and access journeys of participants in this study has highlighted the diverse and complex nature of the scholarly experience while posing important questions for libraries, publishers and booksellers. Even with the speed and expansive access afforded by digital technology, finding, evaluating and obtaining academic content may involve multiple stages and a number of different tools and approaches. Along with the insights and opportunities already shared, this study suggests five overarching lessons for publishers, libraries and booksellers: be present, focus on customers, shift to services, adapt and collaborate. Each of these issues is discussed briefly below.

## Be present

In some cases digital technologies have made the scholarly experience more complex, introducing authentication procedures and limiting the amount of material that may be consulted pre-purchase. In other ways they have empowered academics to source information about products, and seek out low prices, from a greater number of sources. They also facilitate the sharing of information about books, and books themselves, *outside* library and publishing systems.

Printer–publishers once owned the entire discovery and access journey, before booksellers controlled both the moment when a potential buyer could physically examine a product for the first time and the moment of purchase. Today, some participant journeys did not include any direct interactions with a publisher, while only one of the thirty journeys involved an interaction with a traditional bookshop. As Lecinski (2014) points out, this has serious consequences for publishers and booksellers, since it is impossible to solve consumers’ problems if you are not present in the moments when they need you most. If publishers, libraries and booksellers are committed to supporting academics, they must be present at the times when academics are searching for information, when they need help specifying their search terms, when they want to evaluate information and sample content and when they decide to gain access to the material. They must also be present in the places, and on the platforms and devices, where these activities occur.

## Focus on customers

Even when libraries and publishers are present, they may not be focused on attending to user needs. We have already seen that many library catalogues may be designed with the system rather than the user in mind. Publishers, meanwhile, lose customers to Amazon by not providing the information and experience they need and sometimes frustrate those wanting to evaluate teaching resources. These instances highlight a focus on scholarly publishers’ own needs, or those of institutional customers, rather than on the end-users of their content (Michael, 2014). Perhaps publishers can afford to ignore end-users, if libraries are still paying for their products, but participants in this study suggest that end-users will find other ways to meet their needs if they are not met by a publisher or their library. After all, it is the user who is in control of their experience, not the library, publisher or bookseller (Morville, 2005: 104). This has long-term consequences for both the library (whose

acquisition budgets are likely to be linked to usage) and the publisher (who will suffer if library budgets shrink further). Delivering value to end-users requires a new focus on identifying, understanding and meeting their needs.

## Shift to services

When publishers are asked about the extent to which they are customer-focused, publisher Robert Harington suggests their natural response is to parry back with a list of the publisher's 'exciting new offerings' (Michael, *ibid.*). This is a telling remark, since it highlights the product focus of many publishers, who use content-provider business models. The current emphasis on curation supports this, as publishers focus on selling collections of products rather than delivering services or providing tools for readers to curate their own selections. Shifting to a service-provider model can deliver better services, low prices and seamless user experiences (Michaels, 2015; Peters, 2007) but it may require new technological and commercial skills (Sørensen 2012). Investing in these new capabilities is likely to be worth it, since the distinction between publishers with a service or product focus may be that the former survive and the latter don't (Bhaskar, 2013: 120).

## Adapt

Whatever enhancements are made to current publisher, library or bookseller systems and experiences, history suggests that change is a constant. As technology develops, user expectations will change and methods of academic working will adapt, including unforeseen workarounds that enable users to discover, locate and access the material they need. Organisations wishing to be part of this ecosystem must therefore be adaptable and focus on the changing needs of the user. The user makes decisions in the moment, seeking out the most time-efficient route to their end goal and willingly (if sometimes guiltily) dropping long-held loyalties if they spot a better offer. Publishers need to be ready to adapt to the changing research habits of their readers (Conrad, 2015), as should libraries and booksellers.

## Collaborate

The tripartite focus of this report demonstrates that discoverability is a concern shared between librarians, publishers and booksellers. Improving related processes therefore requires cross-sector collaboration (Somerville et al., n.d.), with each of the three players adopting an end-to-end perspective on the discovery, evaluation and access journey (Schonfeld, 2014). Collaboration with users would also enable libraries, publishers and booksellers to more effectively design solutions for them. Looking beyond the ecosystem itself, libraries, publishers and booksellers could also benefit from working with people from other sectors, who have deep understanding of user behaviours and the design of digital experiences. Such partnerships may deliver new inspiration to a sector that, in many instances, appears to default to the underlying models of the pre-digital era.

**'Publishers should draft their discoverability strategies in pencil and be prepared to redraw their roadmaps and adapt'**

Lettie Conrad,  
SAGE Publications

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