



WHITEPAPER

Ebook Acquisition in the UK: Before and After the Pandemic Struck

Practices and trends in tertiary institution ebook acquisition



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The shift to a more virtual user experience is real

“The ongoing pandemic has had a huge influence on what we purchase and how we purchase it.”

Introduction

ProQuest collaborates closely with libraries around the world and continually strives to keep abreast of and support library strategies to meet current challenges. In 2020, we commissioned two surveys to gather insights into the books acquisition process of libraries across the UK in the following areas:

- Changes in the library budget and how that is impacting book spend
- Importance of resource lists in purchasing decisions
- Ebook acquisition models used and trends
- Views on digital resources versus print and how this affects books acquisition

The first survey took place in January/February of 2020 before UK libraries experienced a dramatic shift in resource acquisition as a result of the COVID-19 pandemic. In the follow-up survey in September/October 2020 we examined emerging ebook purchasing trends and how the library community was adapting acquisition strategies and priorities in supporting the changing teaching and learning landscape.

This white paper outlines the summary of the two surveys according to the UK academic library community before and after the COVID-19 pandemic hit, and the key themes and trends identified during each timeline.

Overall Summary

The world could have never predicted the extraordinary year a global pandemic would bring, and how it would continue to impact into 2021. When ProQuest commissioned the initial UK survey in January 2020, the world was on the brink of a pandemic, but life was still “normal”. The landscape was very different for libraries, with clear priorities and progress towards changing needs for acquisition of content underway. The second UK survey, covering similar questions in October 2020, demonstrates the rapid shift for libraries in the intervening 9 months.

The effects of the COVID-19 pandemic proved to be the most significant difference between the two surveys and the consequences it has created and amplified.

Library budgets were already seeing an increased move towards ebooks before the pandemic with changing user needs and accessibility improvements.

The pandemic exponentially accelerated the demand for more online support and access to e-resources and shifted to more ebook versus print budget spend.

The first survey identified the need to support the growing proportion of distance learning students. In contrast, the second survey determined that it had become essential to virtually support all the institution’s students, staff, and research community.

Now more than ever, the global community is more aware of fake news and flawed research.

One optimism about the pandemic is that it has strengthened libraries’ position as the “virtual front door to authoritative knowledge”.

The change in priorities brings specific trends and challenges to the forefront

“Now more important [is] that our users have ‘instant access’ to book content rather than access to an on-site physical curated collection.”

- The level of diversity in content has increased with a noted decrease in multimedia resources as streaming, and online sources are now more affordable and accessible to the public than ever before.
- There is an increased necessity for publishers to work with aggregators to supply more diverse content to reach a wider community and better support library workflow and user expectations.
- With the shift to more virtual support, libraries have seen an increased challenge around access to the requested content and acquiring content for institution-wide use.
- Print was already noted in the first survey as a decreasing trend but now more so than ever in the second survey – especially the implications around how libraries disseminate the print resources in a more virtual environment and quarantine to make them safe without increasing the chance of infection.
- As detailed in the first survey, resource lists continue to demonstrate the trend around change and the continued adoption of resource list service providers.
- The second survey has highlighted the need for etextbooks which have become more popular with 86% stating that the books budget was wholly or partially accommodating this trend.
- The number using etextbook aggregators has grown in the COVID-19 pandemic.

Price and multi-user access remain high on the agenda and key pain points

“We took out a new subscription to ProQuest Academic Complete which is proving really popular and helping to relieve the stress on the main physical collection.”

- Barriers are being created where there are inflexible business models and limited user access.
- There are calls for better transparency around production cost and use of more flexible models.
- There’s an evident dissatisfaction at the cost of ebooks versus their print counterpart. This is resulting in a notable trend towards the need for open access ebooks.
- Budgets remain a constant topic of discussion, but more so now about budgets’ sustainability for current demands.
- The trend seems to remain the same in the first and second survey in that the majority feel that the book spend will decrease or stay the same over the next three years.
- Some have faced budget freezes or reallocation of funds to deal with the massive influx in demand.

Libraries continue to adopt multiple ebook business models to accommodate their needs

Aggregated content and aggregators remain a vital part of the library ecosystem and a popular choice for libraries. Title by title ebook acquisition model from aggregator platforms remains the most popular (82% pre-pandemic and 87% post-pandemic hit) with direct from publisher observing a drop. With flexible business models, choice of user access licenses, range of content, unified platform and subject areas, aggregators provide a more agile solution and maintain the institutional workflow.



Pre-COVID-19 Pandemic Survey – January 2020

Introduction

Pre-pandemic in 2020 there was an equal split between ebook and print spend, there was a strong trend to shift the library budget towards ebooks. This trend was driven mainly by changing user needs, as more students switched to distance learning. As such, the shift towards ebooks was forecast to increase further over the next three years. The most valued attributes in ebooks were multi-user access and price.

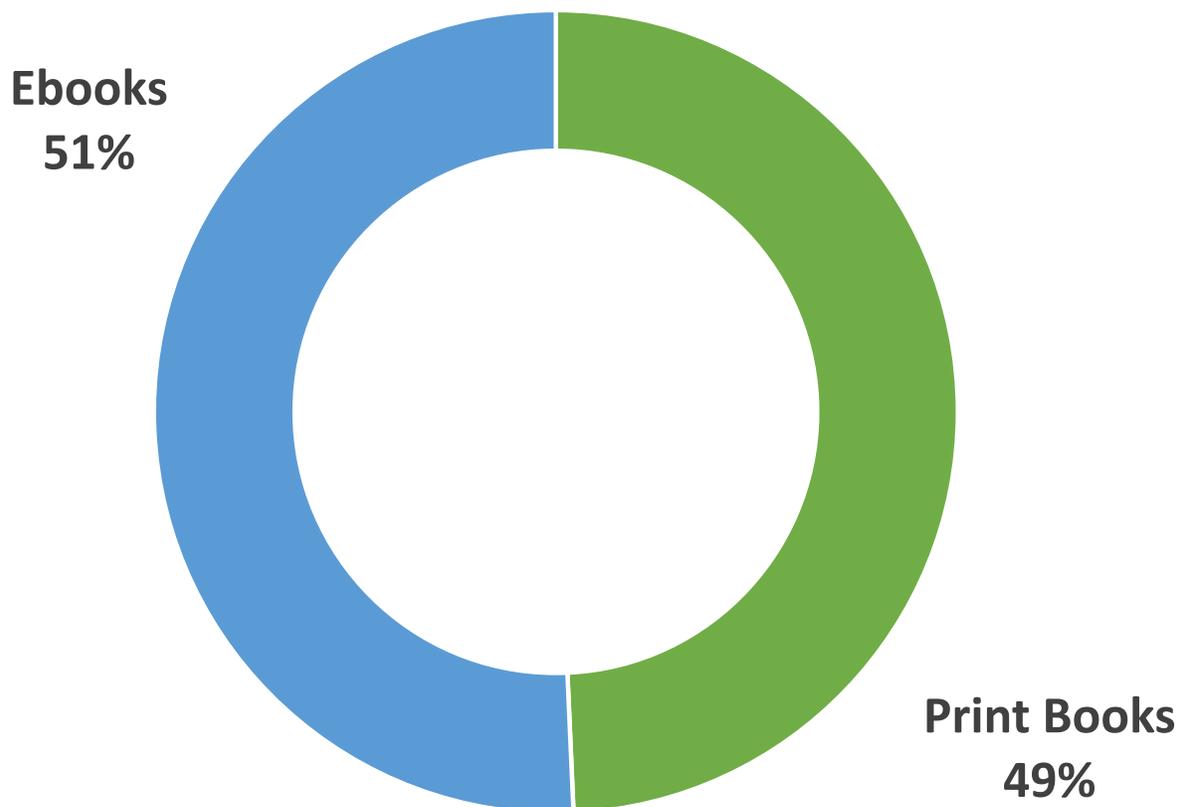
The survey also revealed that on average, 24% of the overall content budget was being spent on books. However, 68% of libraries had seen flat or decreased budget for books over three years.

University libraries across the UK had become heavily reliant on resource lists to make purchase decisions. The resource lists themselves are evolving as they gradually take on more types of content.

Library suppliers and aggregators were the primary sources of both print books and ebooks. When it comes to ebooks, most libraries adopted more than one business model for their acquisition.

Ebook and print book spend was nearly equally split in the UK

Respondents were asked to provide (or estimate) the approximate budget split between ebooks and print books at their universities. Forty-two respondents were able to provide a percentage split between print and ebook budget spend. Some respondents who did not give a percentage of split offered comments instead. Of those who did provide a percentage split, the average was 49% print books/51% ebooks.



The transition of budget to ebook is happening in the majority of libraries

78%

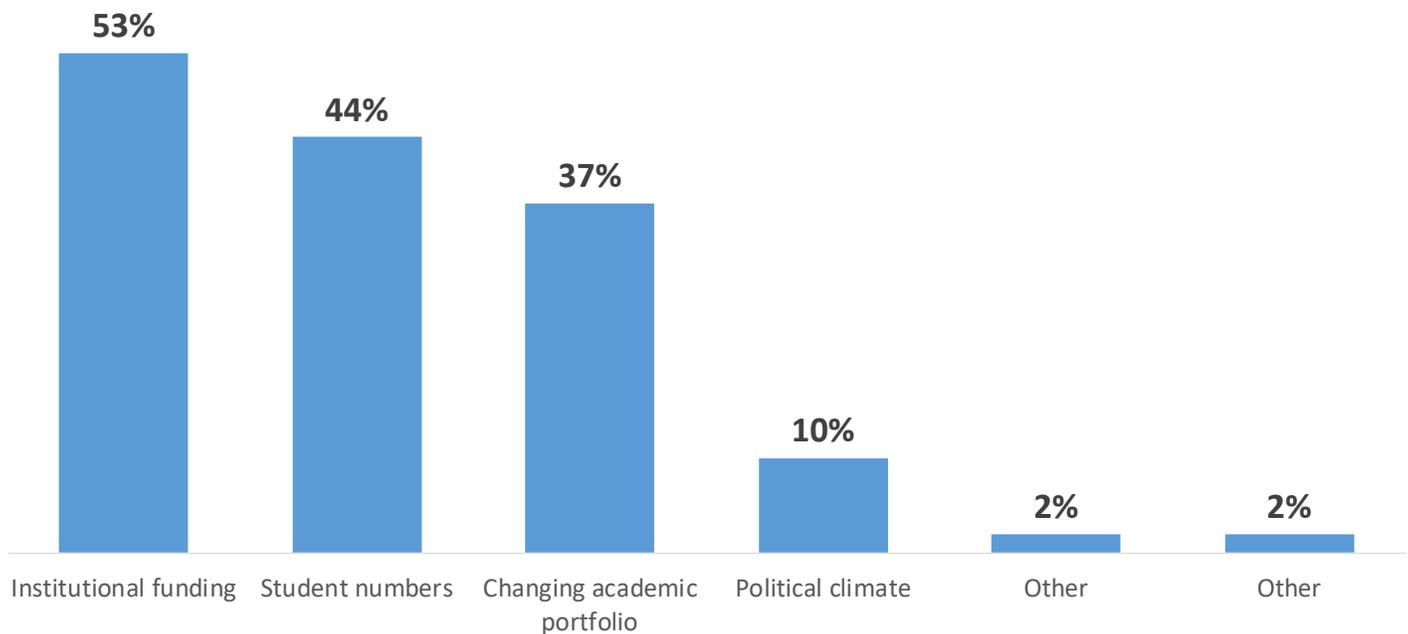
of respondents reported that expenditure on ebooks had increased and on print decreased over the past three years.

Those who recorded an increase in electronic spend over print supplied the following reasons: increased use of EBA or DDA models and therefore the need to increase electronic budgets; increased user demand; and introduction of an e-first policy.

- Russell Group respondents had increased spend on ebooks and decreased spend on print in the past three years.
- 78% of 1960s universities reported an increase in ebook spend.
- The other three types of institution categorized either saw no change in the balance or an increase in spend on ebooks and a decrease in spend on print.

Changing user needs have the greatest influence on increasing electronic spend

The key drivers of change influencing increased ebook expenditure were identified as “changing user needs” (selected by 68% of respondents); “institutional funding” (53%), “student numbers” (44%) and “changing academic portfolio” (37%). 10% chose “political climate”. 2% also identified other (diverse) factors.



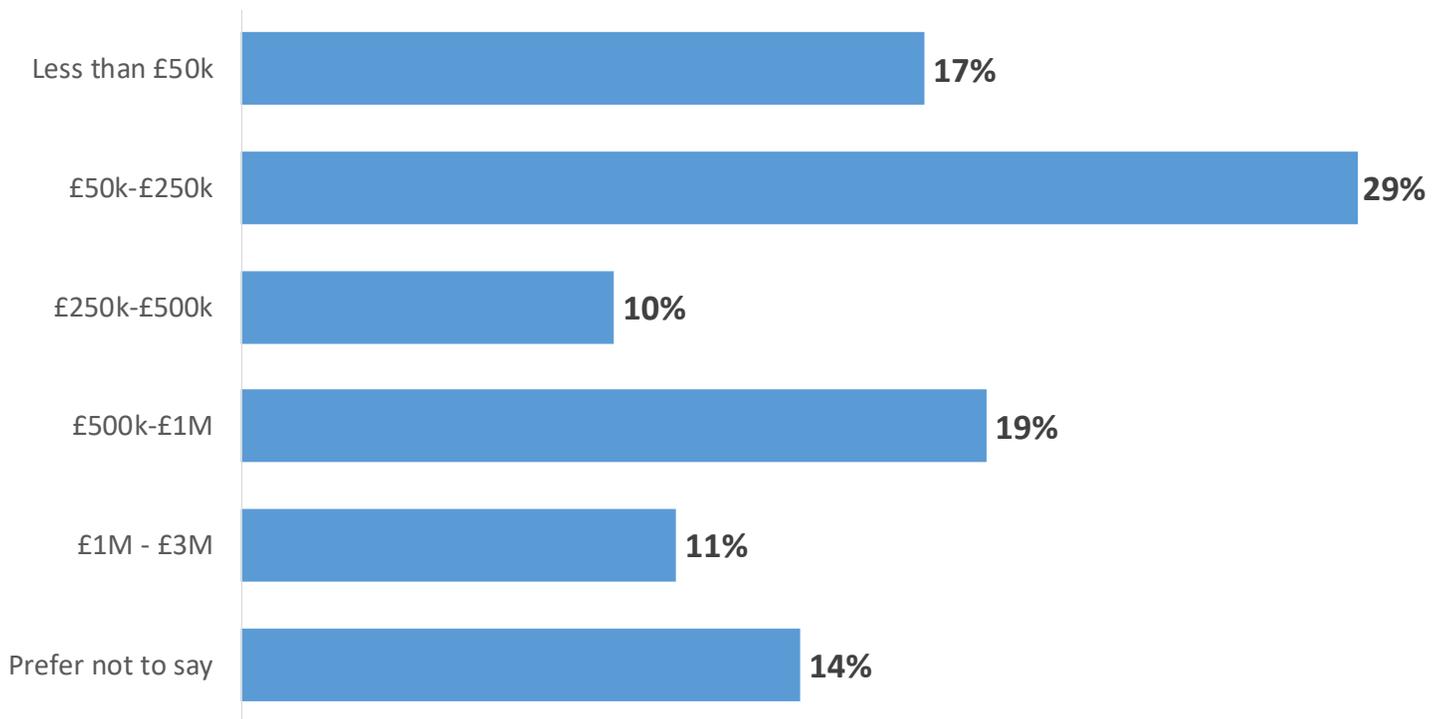
24% is the average spend of overall content budget on books

19% of respondents said they didn't know what percentage of the overall budget was spent on books, or that it was impossible to tell because of the way their budgets worked. A further 26% said approximately 20% of the overall content budget was spent on books; otherwise, the percentages varied from 5% up to 80%. The average given was 24%.

Post-2000 institutions were most likely to spend a higher proportion of the budget on books. However, a minority of both Russell Group and post-1992 institutions spend similar proportions.

68% of libraries have seen flat or decreased budget for books over three years

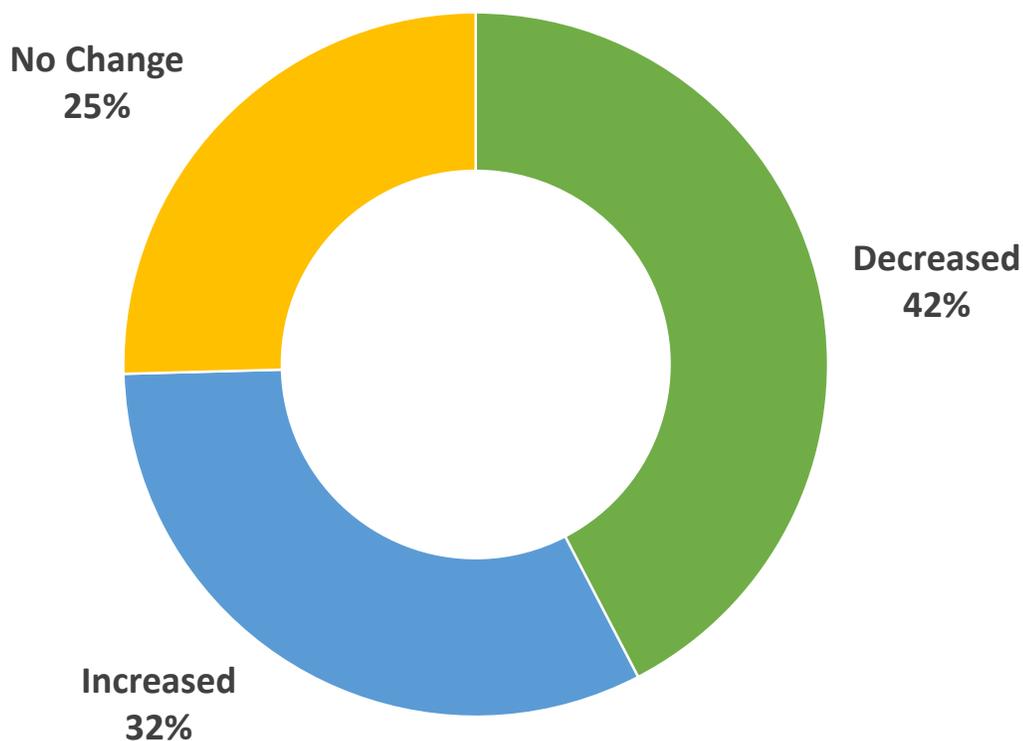
51 respondents supplied a figure for book expenditure within a range provided. This varied from less than £50,000 (17% of respondents) to £1M-£3M (11%). 32% said the overall content budget had increased over the past three years; 42% said it had decreased; and 26% said it had not changed.



11 respondents gave further information about **expected budget increases**. The answers specific to books acquisition included: replacing core textbooks with ebooks; “demand for ebooks is increasing”; and “an increase in expenditure on ebooks means lower expenditure on print”. One respondent observed that ebooks cost more, so “we will need to find a way of increasing the budget.”

More general comments on budget increases included: increased spend on journals likely, books possibly; more money allocated because student numbers are higher; subscriptions are costing more; or that the budget was linked to inflation.





13 respondents gave further information about **expected budget decreases**. The answers specific to books acquisition included: “the library is taking money from the books budget to accommodate the increased cost of journals”; “reducing expenditure on books is generally easier than reducing subscription spend” and “books spend is likely to reduce a bit, but we will still buy everything on the reading list”.

More general comments on budget decreases included: “the institution is experiencing across-the-board cost cutting”; and “there’s not enough increase in funding to cover inflation”.

Six respondents gave further information about **flat budgets**. The answers specific to books acquisition included that the budget would stay the same but might need to be re-engineered to move spend from books to journals and “we’re reorganising the spend – we’re now buying full annual packages of reference series”.

A more general observation made by several respondents was that a flat budget means reduced spending power.

Other noteworthy comments relating to books acquisition included:

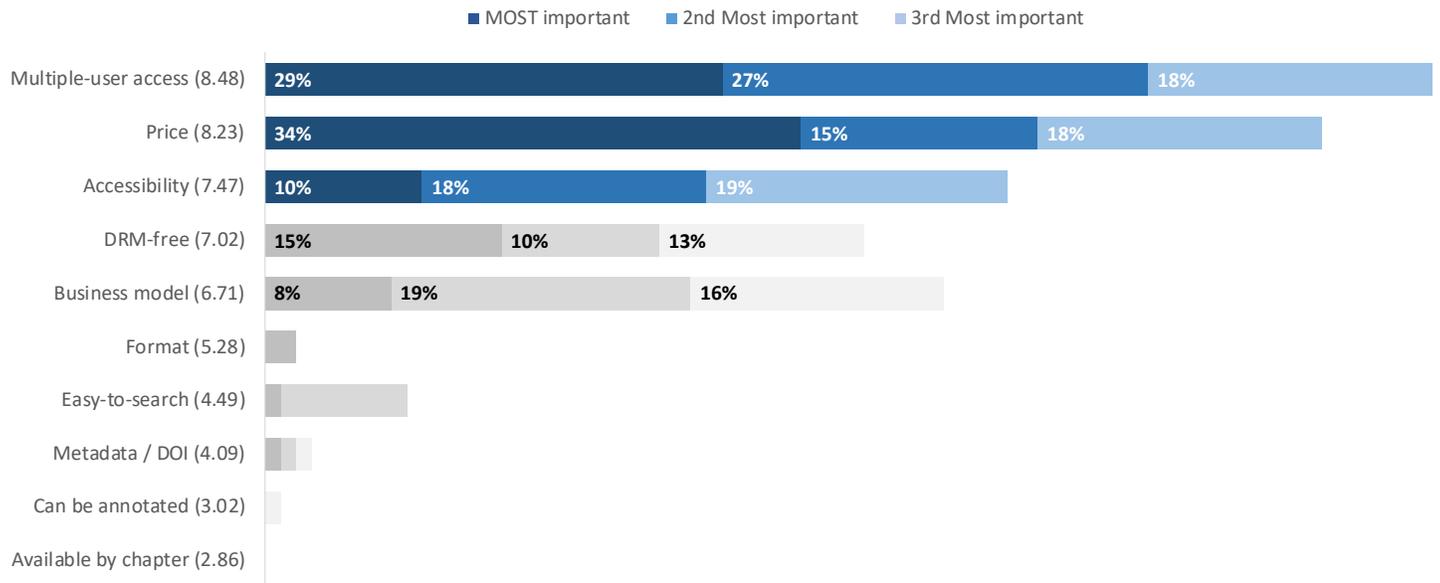
- **Ebook bundles** - there will be more emphasis on ebook deals rather than title-by-title acquisition; this changes the way purchasing decisions are made.
- **Monographs** - an increase in etextbook provision will put pressure on the monograph budget.
- **VAT** - If VAT is removed from electronic resources¹, the university may claw back some of the resources fund.
- **Brexit** - the political situation and associated recruitment issues (staff and students) are expected to bring profound change.
- **Distance learning** – the introduction of more off-campus courses means less need for print books and more need for ebooks.

75% of respondents thought that further changes in budget over the next three years would be very likely or likely.

¹Since the survey was completed, it was announced that VAT will be removed from electronic books in December 2020.

Multi-user access and price are the valued attributes in ebooks

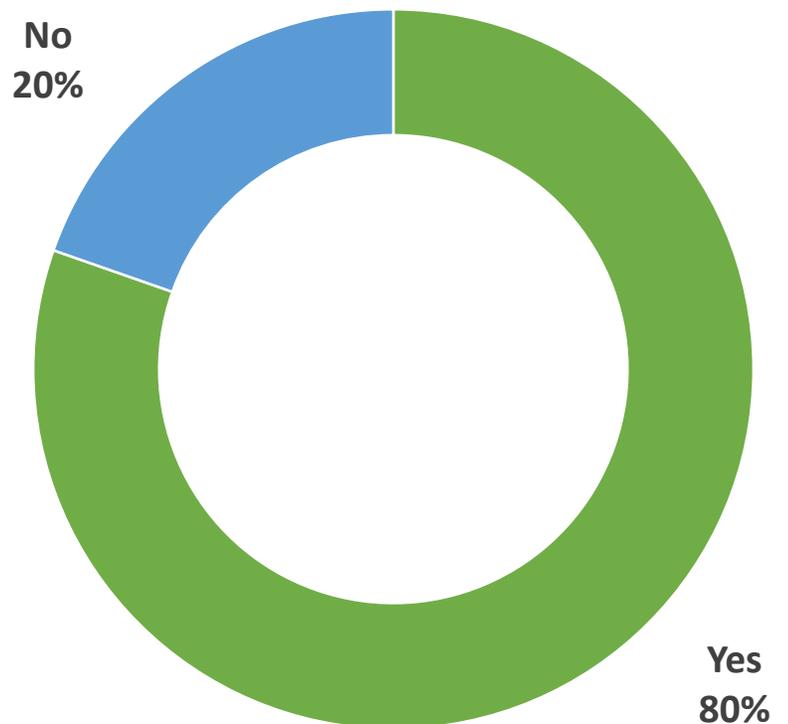
The most important ebook attributes identified by the respondents were multi-user access, followed by price, accessibility and DRM-free – in other words, respondents valued access and price above other attributes. The type of business model available also ranked highly.



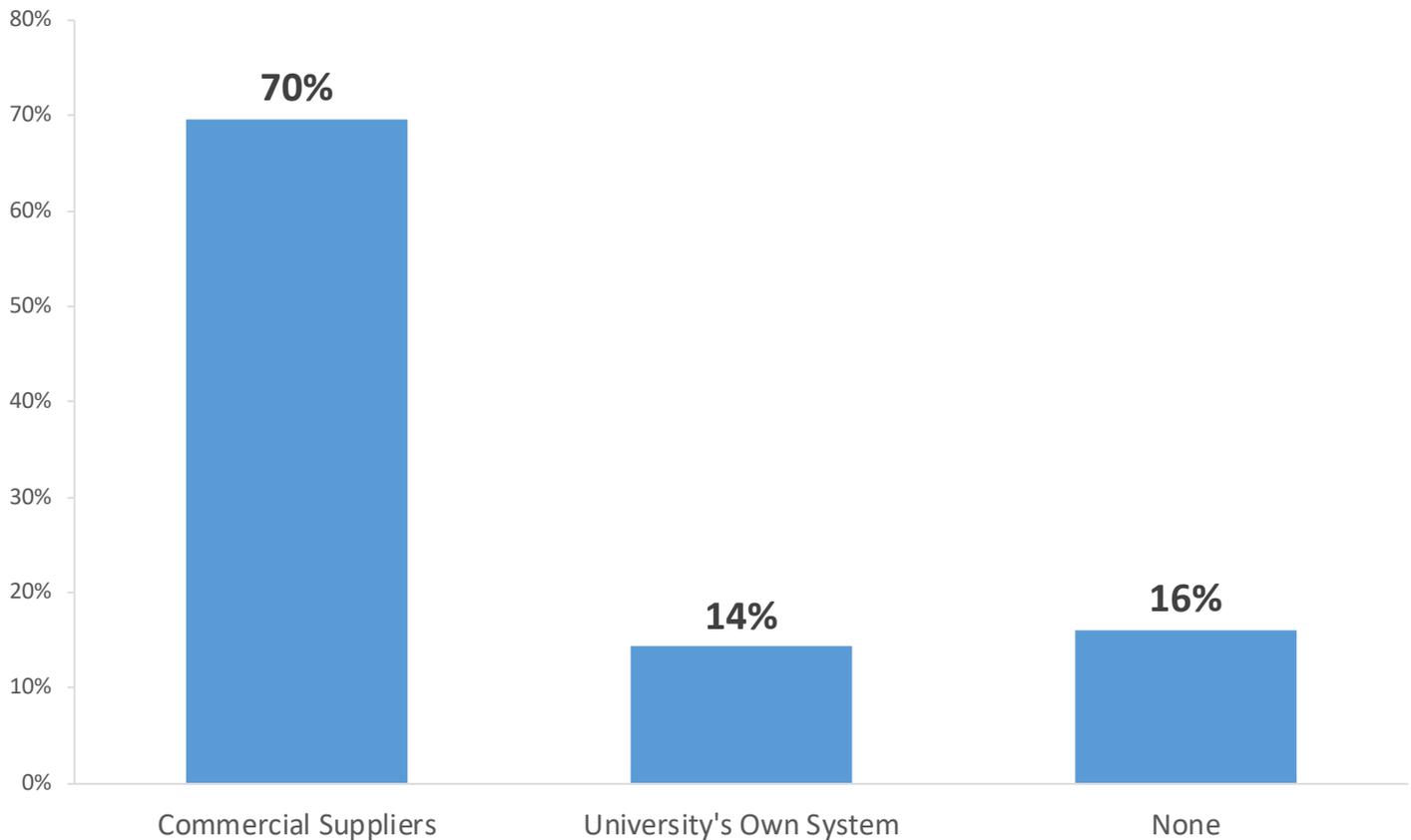
UK libraries are heavily relying on resource lists to make purchase decisions

90% of respondents said the decision to purchase was aided by being able to use resource list software.

Of those using resource list software, 80% of respondents said the resource list was the principal vehicle for determining purchase decisions.



Most UK libraries are using commercial resource list solutions



70% of respondents said they are using a commercial supplier for their resource list solution such as Leganto, Keylinks, Rebus and Talis. Another 14% are resorting to spreadsheets or some form of in-house system, while the rest are not using resource lists at all.

Resource lists are gradually taking on more types of content

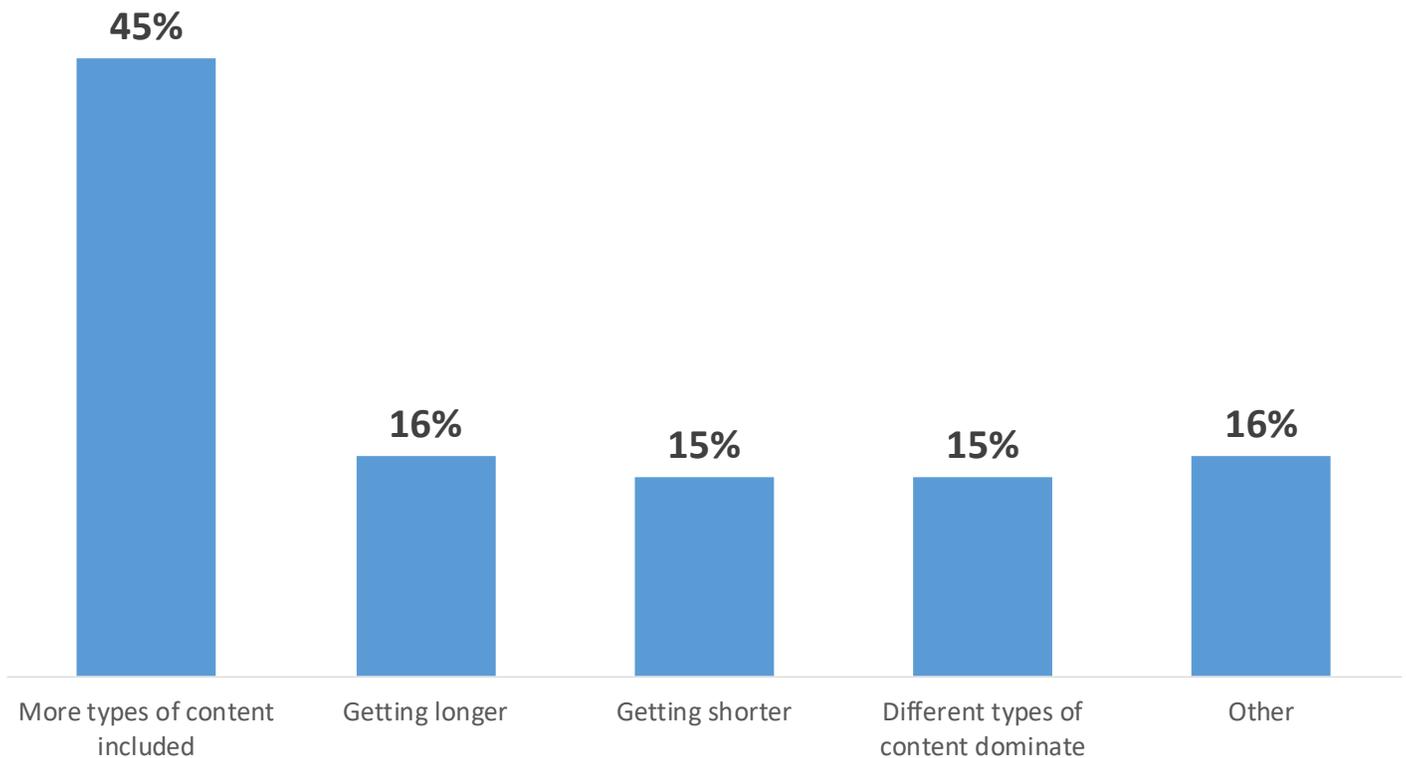
82% of the respondents agreed that the make-up of resource lists was changing at their universities. The greatest step-change identified from the list of options provided was that more types of content are being introduced. Comments included that the introduction of resource list software resulted in an increasing number of resource lists, and that this trend is still ongoing, though there is still some way to go before libraries succeed in obtaining resource lists for every course.

Two respondents said about half of their courses currently sent the library resource lists. Many respondents said they were making more use of VLE content; and several said that inclusivity (gender, race etc. of authors / inclusive theories) and accessibility (for students with disabilities) now played a bigger role in the choice of resource list material than they had done in the past.

Others emphasized again that resource list software has made the process more efficient; some said that lecturers create weekly reading list sections (meaning that availability of just-in-time ebook acquisition is important); and a few said that resource lists are now dominated by a limited set of core texts.

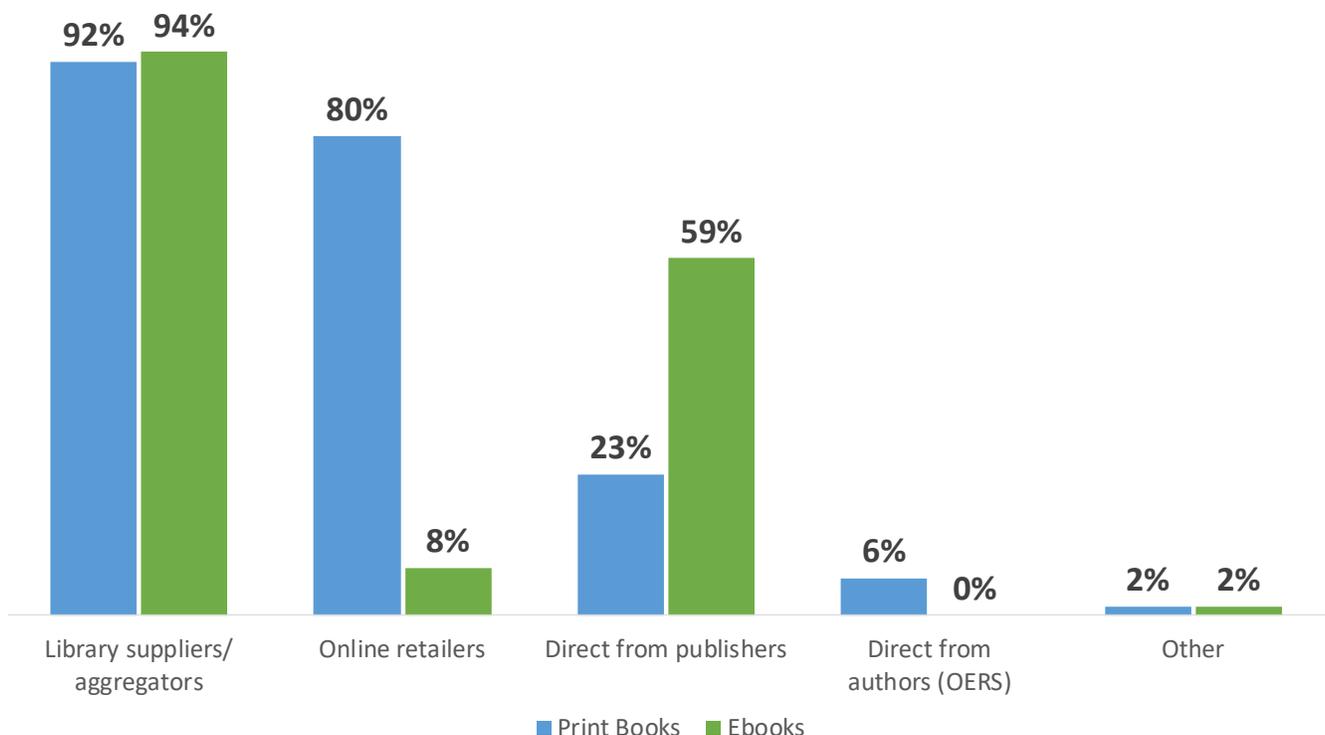
Three respondents noted there had been little change.

The results did not show marked differences in trend by institution type.



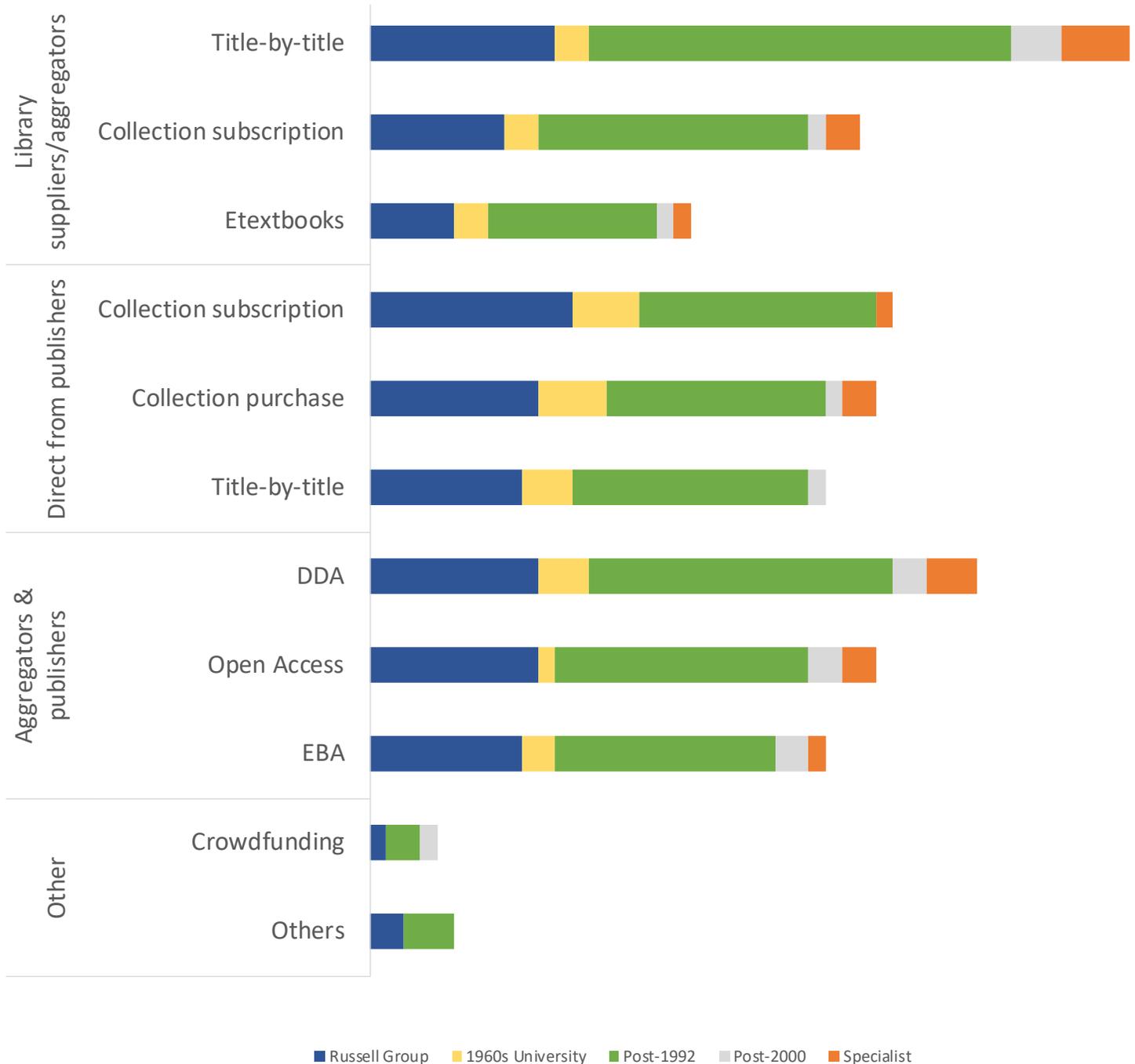
Library suppliers and aggregators are the main sources of both print books and ebooks

Asked from whom they chose to buy print books and/or ebooks, almost all respondents said they purchased both from library suppliers and aggregators. 23% and 59% respectively said they bought print books and ebooks direct from publishers. 80% said they procured print books from online retailers: a new trend which indicates that price and speed of delivery are considered more important than “shelf-ready” in certain circumstances, although some respondents said the number of books acquired in this way was relatively small. By contrast, only 8% said they bought ebooks from online retailers. There was little significant difference by institution type.



Libraries typically resort to more than one ebook business model

All respondents said they used more than one ebook business model, some indicating this was from choice. 82% said they used title-by-title acquisition from library suppliers or aggregators to build their ebook collections. More than half acquired ebooks directly from publishers, using a variety of models. DDA and open access were also popular models. Etextbook acquisition and EBA business models were mentioned by fewer respondents but are likely growing trends.



UK libraries weigh up many pros and cons across ebook models

The survey concluded with three interdependent questions that asked respondents which was their preferred business model; the reasons for their choice; and the main disadvantages associated with this model. 66% of the survey respondents answered this question². A summary of the responses received has been captured in the following table:

ProQuest Ebook Acquisition Business Models Survey			
Quantity	Preferred Model	Advantages of Preferred Model	Disadvantages of Preferred Model
14	Title-by-title	<ul style="list-style-type: none"> • Meets resource list demands • Aids budget control • Don't have to search multiple catalogues • Can choose most appropriate access level • If aggregator-supplied: <ul style="list-style-type: none"> - not lots of contracts - can check for availability against print - ease of both acquisition and payment 	<ul style="list-style-type: none"> • Some material not used when librarian chooses • DRMs not liked • DRM is more restrictive, "but functionality largely OK" • Not all the titles wanted available
6	EBA	<ul style="list-style-type: none"> • Good when plenty of content is opened up • Users get access to all resources (when there are sufficient funds) • Avoids buying unwanted titles 	<ul style="list-style-type: none"> • Expensive • Most useful at the start of the contract – diminishing value as time goes on • Users get used to seeing all the content: it's harder to withdraw content once users have already seen it • Not sustainable over a longer period of time
5	DDA	<ul style="list-style-type: none"> • Access is guaranteed and browsing for less than ten minutes is free • Works when "heavily-profiled" • Breadth of collection • Student-driven • Helps budget go further • Serves the student community well; makes best use of funds 	<ul style="list-style-type: none"> • Some titles only used once • Often includes DRM • Can't upgrade to DRM-free
4	Unlimited multi-user access	<ul style="list-style-type: none"> • Better experience for students • No turnaways • "pleases more people" • Easy to manage 	<ul style="list-style-type: none"> • Expensive • Not all titles wanted are available • DRM restrictions
4	Unlimited multiple user access, DRM-free specified	<ul style="list-style-type: none"> • 80% of the budget spent on resource lists but can still only fulfil requirements using this model 	<ul style="list-style-type: none"> • Students don't like multiple platforms • Publishers' platforms less reliable than aggregators' platforms
4	Multiple user access using the credit model	<ul style="list-style-type: none"> • Supports the ethos that information should be available to all students 	<ul style="list-style-type: none"> • Can be more expensive than other models • Prices can rise rapidly • Difficult when credits run out
2	Outright purchase	<ul style="list-style-type: none"> • Guarantees availability • Easy for workflows • Better control of budget – subscription costs escalate 	<ul style="list-style-type: none"> • Expensive • Some titles little-used
2	Aggregator collections	<ul style="list-style-type: none"> • Simple, straightforward • Meets specific requirements within a small subject range 	<ul style="list-style-type: none"> • Can't always get wanted titles

² Some of those who did not reply had already said they liked to work with a variety of business models.

Post-COVID-19 survey once the pandemic had taken hold – September/October 2020

Introduction

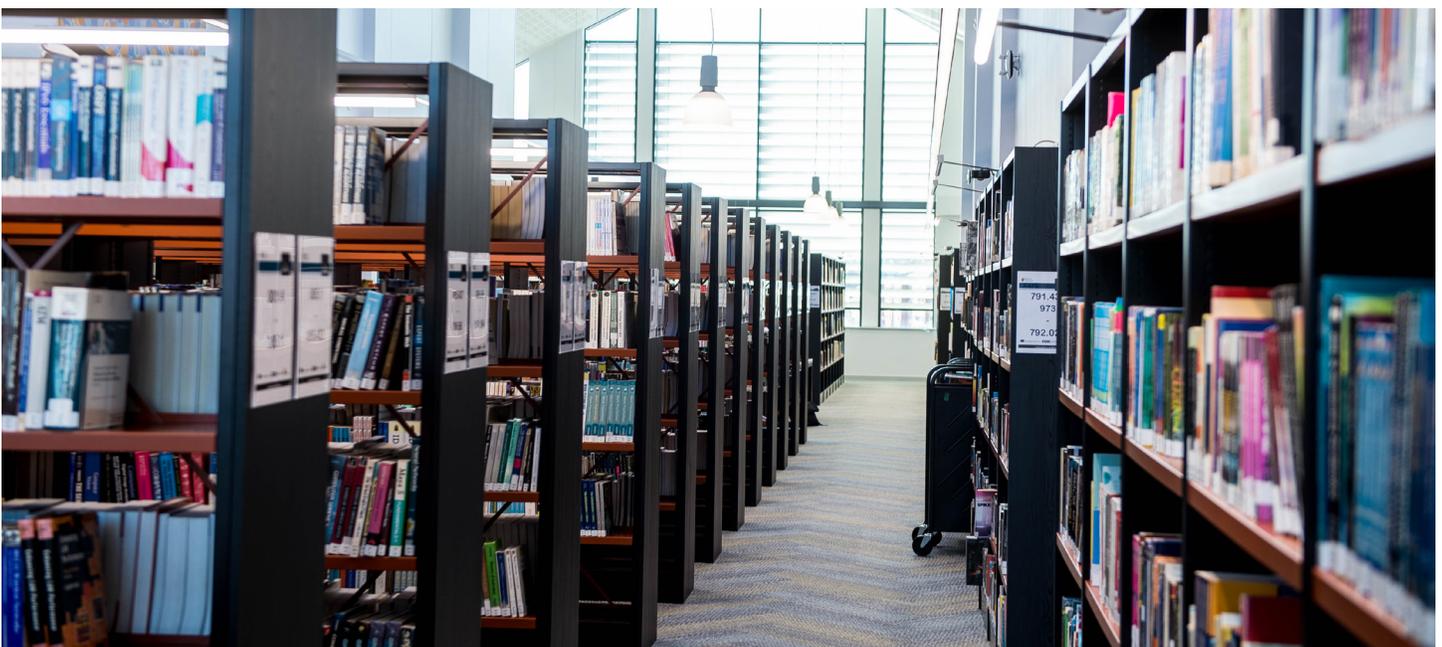
The COVID-19 pandemic has had an undeniable impact on libraries in 2020 and into the new academic year 2020/21 with an augmented need to support more blended learning and multiple content types. This survey summarizes the opinions and policies of libraries across the UK following several months of disrupted service and diversification due to the pandemic.

Survey responses concluded that the split between ebook and print spend shows a lean towards ebook spend (57%) now more than 14% higher than print spend. The accelerated focus on ebook content and eresources introduced budget challenges around accommodating higher costs of ebooks compared to their print counterpart, lack of flexible license and multi-user access issues. Also, over a third reported that their book spend had increased through the first part of 2020, and nearly a fifth said that they had spent more than 50% of their overall content budget on books. Print has seen a decrease in demand during the pandemic.

Etextbooks were more in demand with a notable increase in use of etextbook aggregators since the pandemic hit. 86% of etextbook spend is covered by the books budget as standalone or combined with another budget. When looking at budget allocation in the next three years: content accessibility, sustainable book budgets and an increased focus and spend on ebooks were top of the list of priorities.

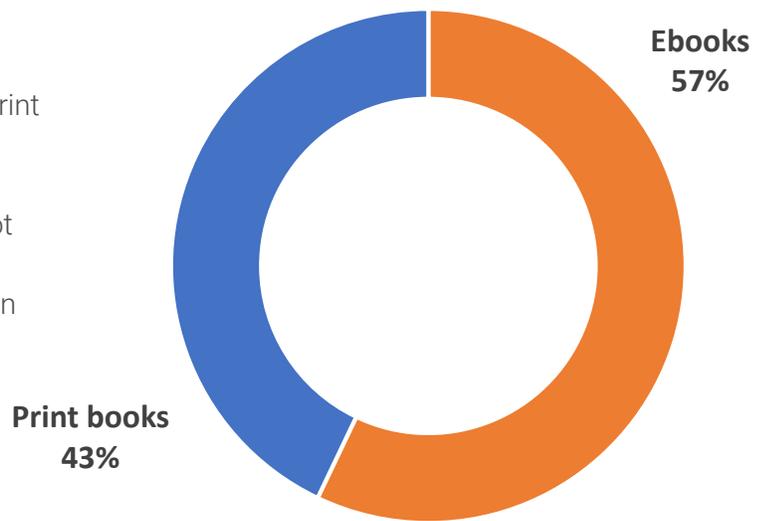
Price, multi-user access and content accessibility were ranked as the most crucial ebook attributes above all else. Nearly all agreed that resource lists were going through some kind of change at their institution. As well as accommodating diverse content, the analysis indicated an increase in the adoption of resource list management service providers.

Aggregators and library service providers play an essential role in simplifying processes and supporting libraries with more agility in the choice of business models and access to content for multiple users. In contrast, publishers are perceived by some to be becoming a barrier due to a lack of options and flexibility. Besides, some content is not made available to aggregators and library suppliers which adds additional complexity to library workflow. Libraries are adopting multiple ebook business models to accommodate their needs and meet their budget challenges.

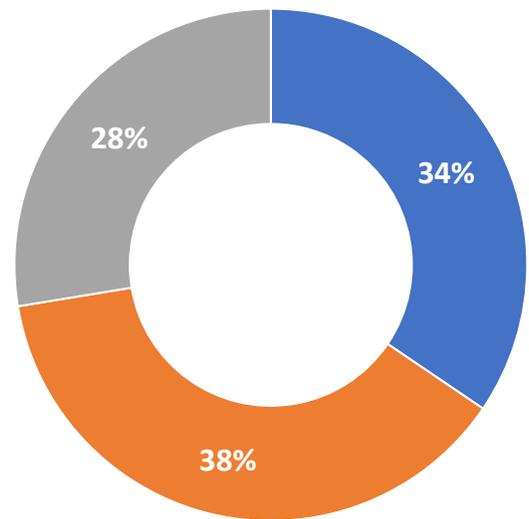


Ebook spend shifting in the UK

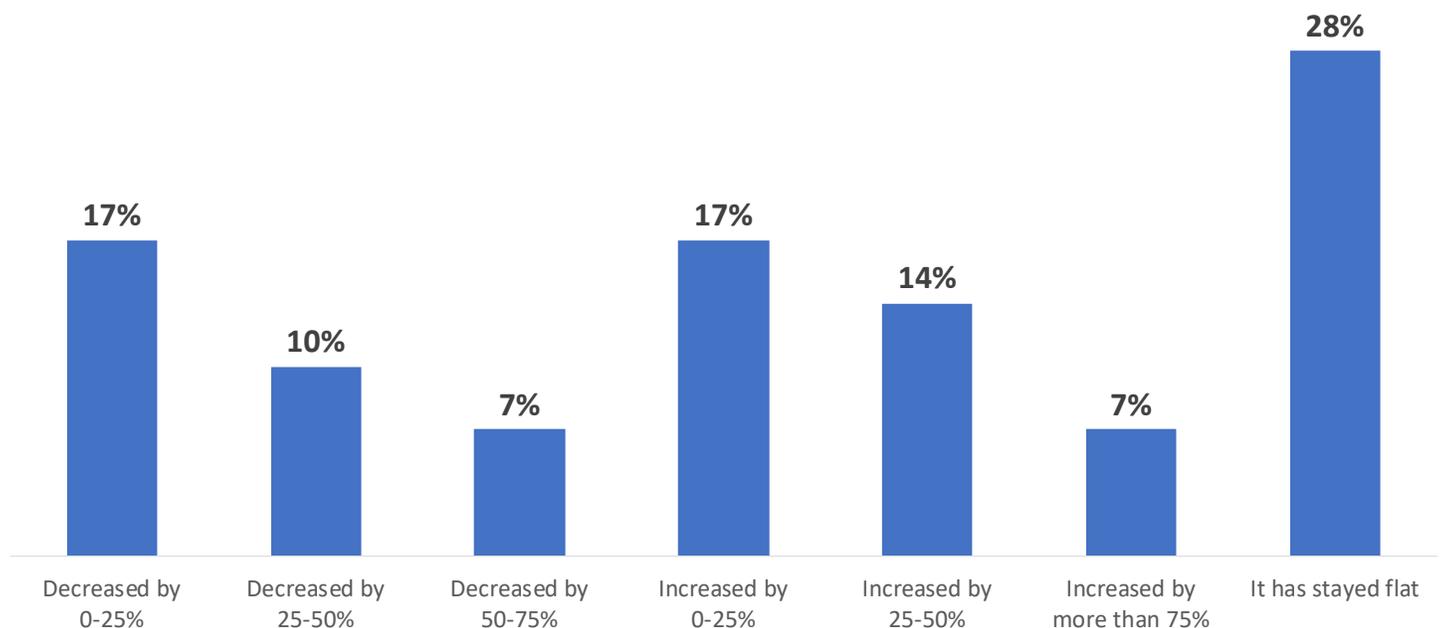
24 respondents provided a percentage split between print and ebook budget spend with the average being 43% print books/57% ebooks. Some respondents who did not give a percentage split commented that they do not monitor/allocate this spend, there is no current budget for print books, and it is at an individual level rather than collection level.



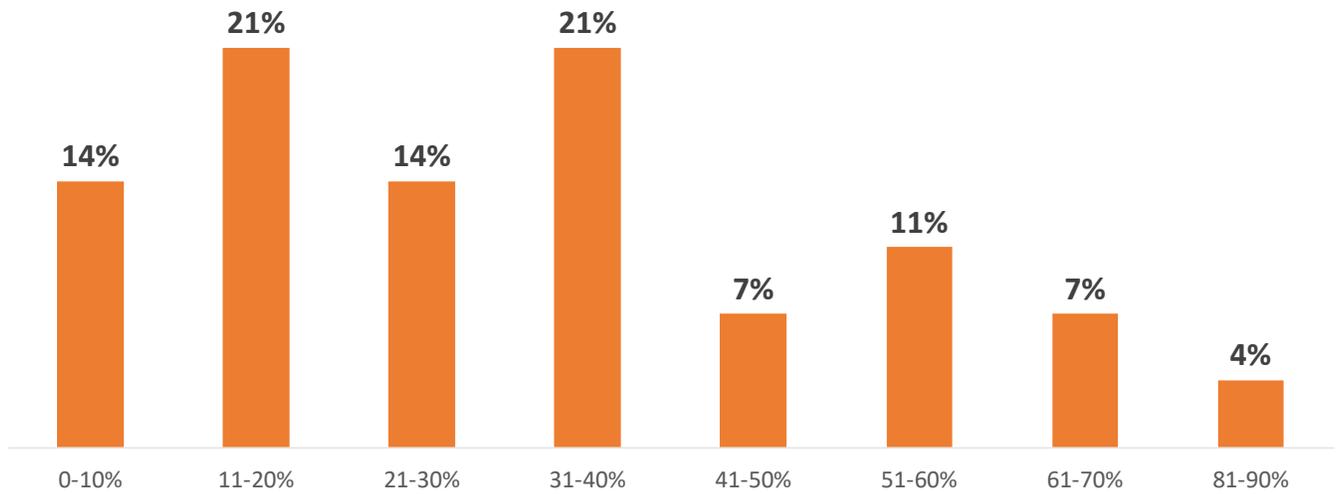
In terms of print and electronic book spend, 38% of the 29 responders said that their approximate amount spent increased from January to July 2020, whereas 35% said it had decreased. About half of the decrease was between 0-25% spent. The highest increase was at 0-25% spent, with only 7% increasing by more than 75%.



■ Decreased ■ Increased ■ Stayed Flat



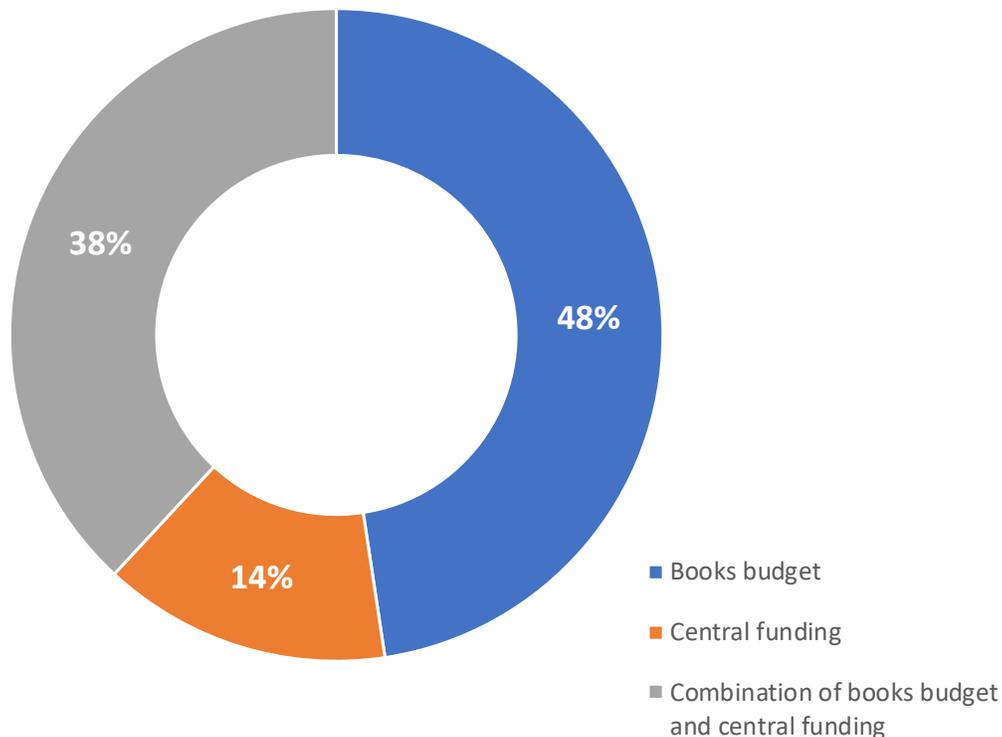
21% of 28 respondents had spent more than 50% of their overall content budget on books in the first seven months of 2020 (January to July).



The majority of etextbook spend is from the book budget

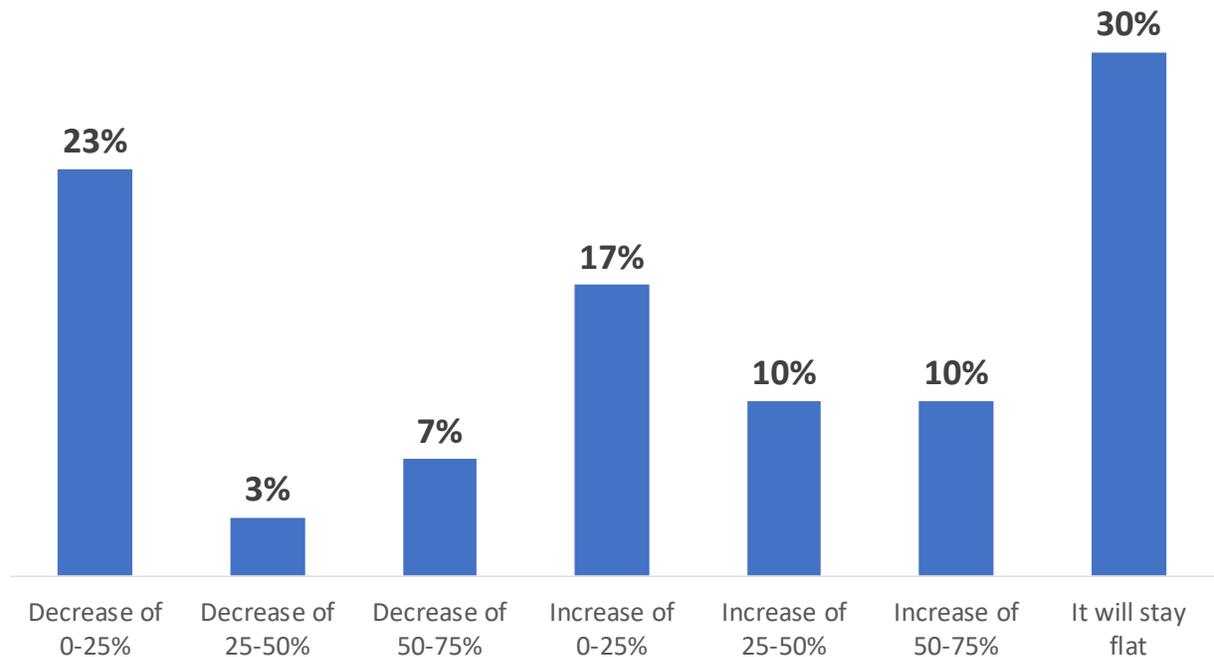
48% of the 21 respondents stated that etextbooks were coming out of the books budget, with 38% coming out of a combination of the books budget and central funding.

86% of etextbook spend is accounted for by the books budget, whether standalone or combined with another budget.



Opinion split over the books spend changes for the 2020-21 academic year

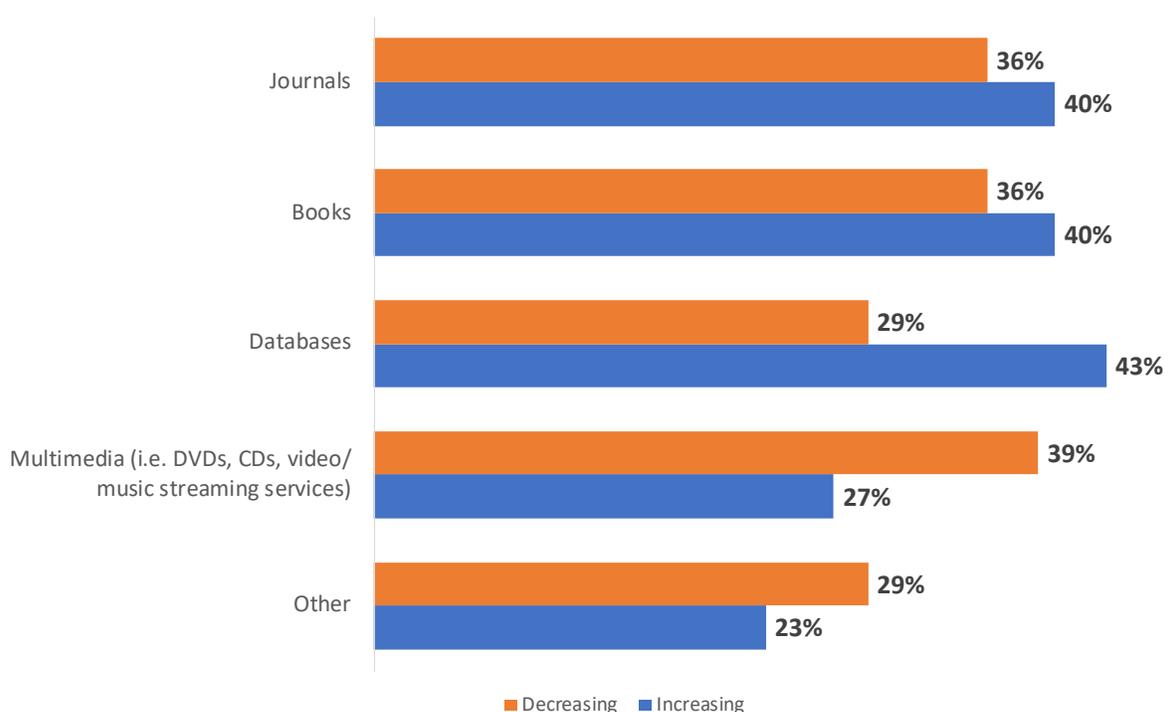
In the 2020-21 academic year, the 30 respondents opinions were relatively evenly split three ways with expected total books spend changes. 33% stated a decrease, 37% noted an increase and 30% indicated that spend would remain the same.



Multimedia and print spend on the decline

Databases have seen the most increase with journals and books just behind. "Other" items specifically highlighted were ebooks and etextbooks.

Multimedia saw the most decrease (39%). "Other" was reported as print and second hand, where the majority cited a reduction in print magazines, journals and materials.



Accessibility, sustainability and ebooks are the top three themes for budget allocation over the next three years

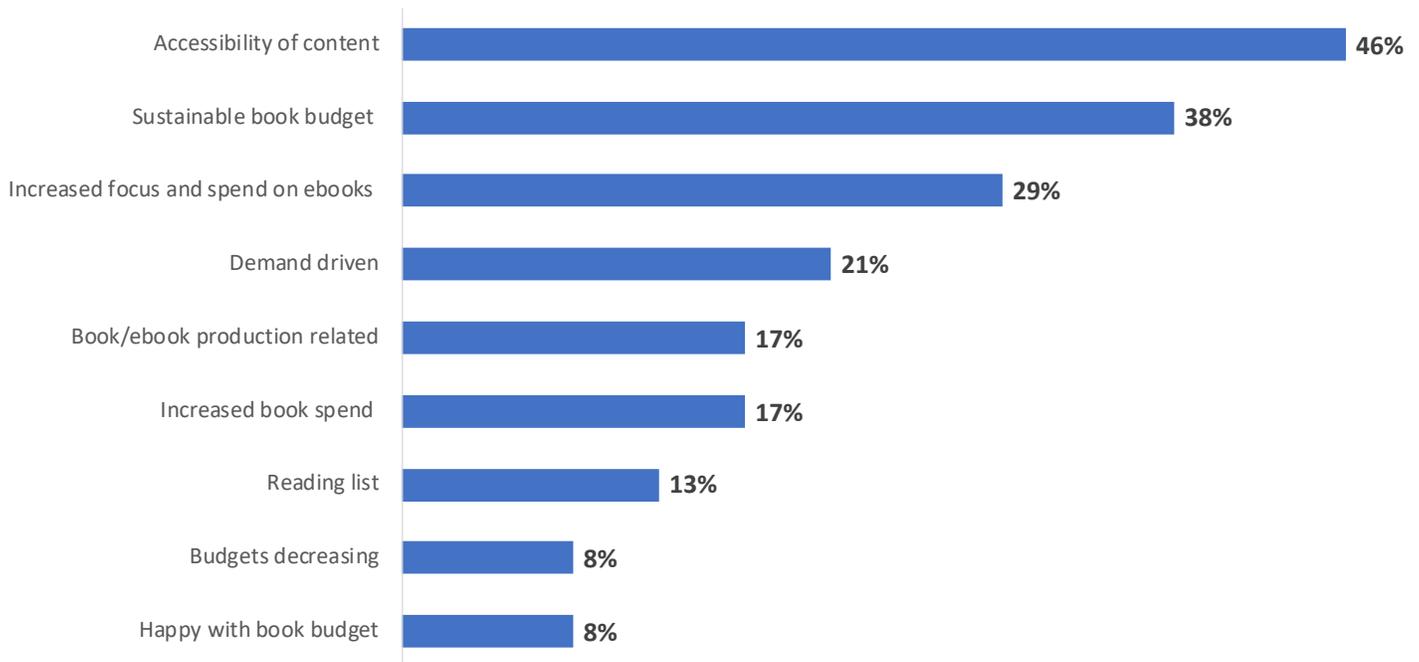
24 respondents answered what they would like to see changed for budget allocation over the next three years. The top three common themes were content accessibility, sustainable book budgets and an increased focus and spend on ebooks.

Content accessibility covered areas such as moving to open access ebooks and etextbooks, costs around access and more affordable ebooks to increase access, and licenses reviews to move away from limited models to unlimited access and simplified models.

Sustainable book budgets included topics around book budget review, protecting print book budgets from being swamped by ebooks, a better balance between books and ebooks spend, and contingency plans with external influencers like a pandemic and increasing journal costs.

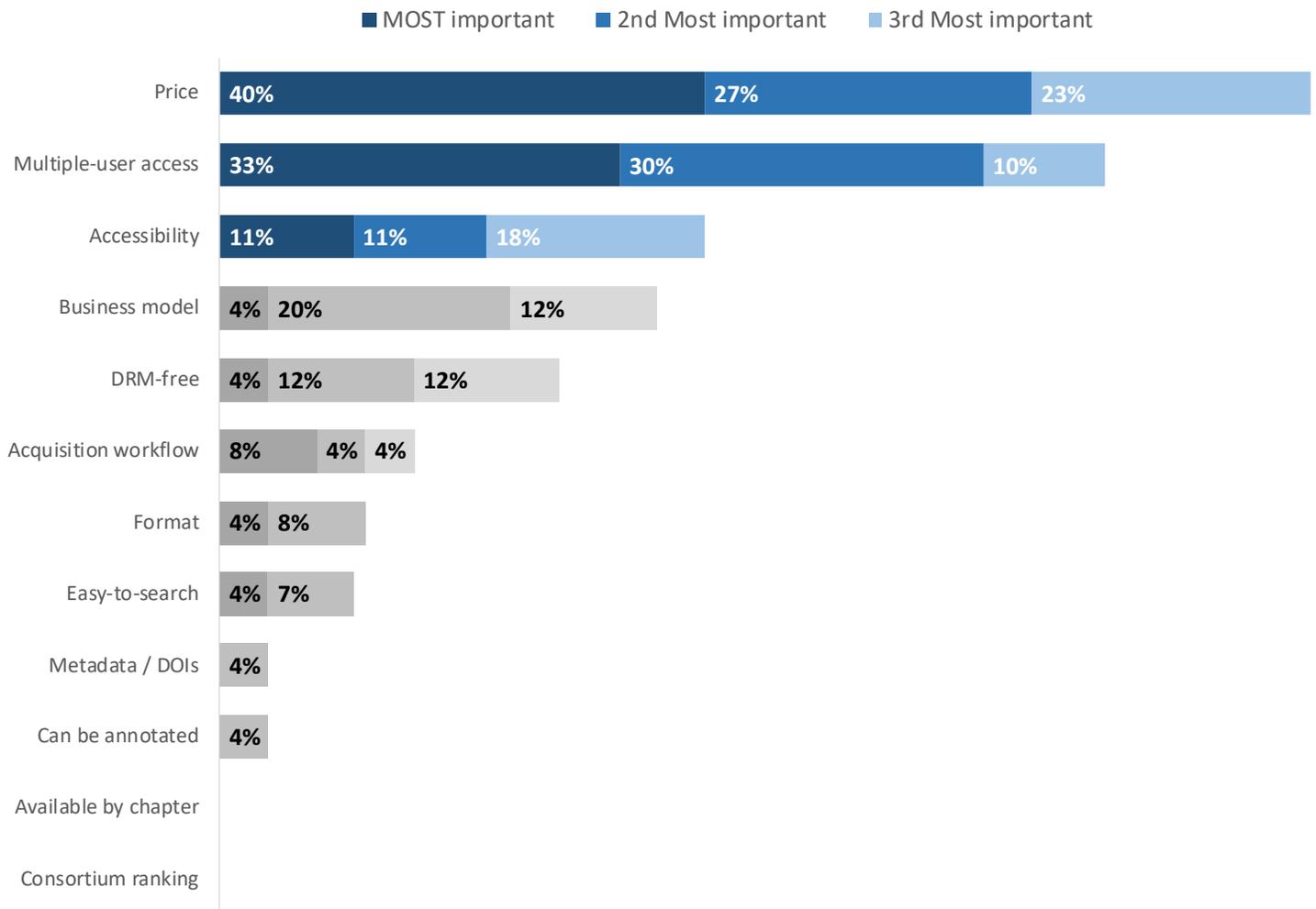
Increased focus and spend on ebooks came in at number three with more demand and focus in the institution on ebooks, lack of physical space for print books and higher costs for ebooks that need accommodating.

There was also a call for improved education around print and electronic book production, including cost and pricing transparency of a print book versus an ebook.



Price, multi-user access and content accessibility rank most important

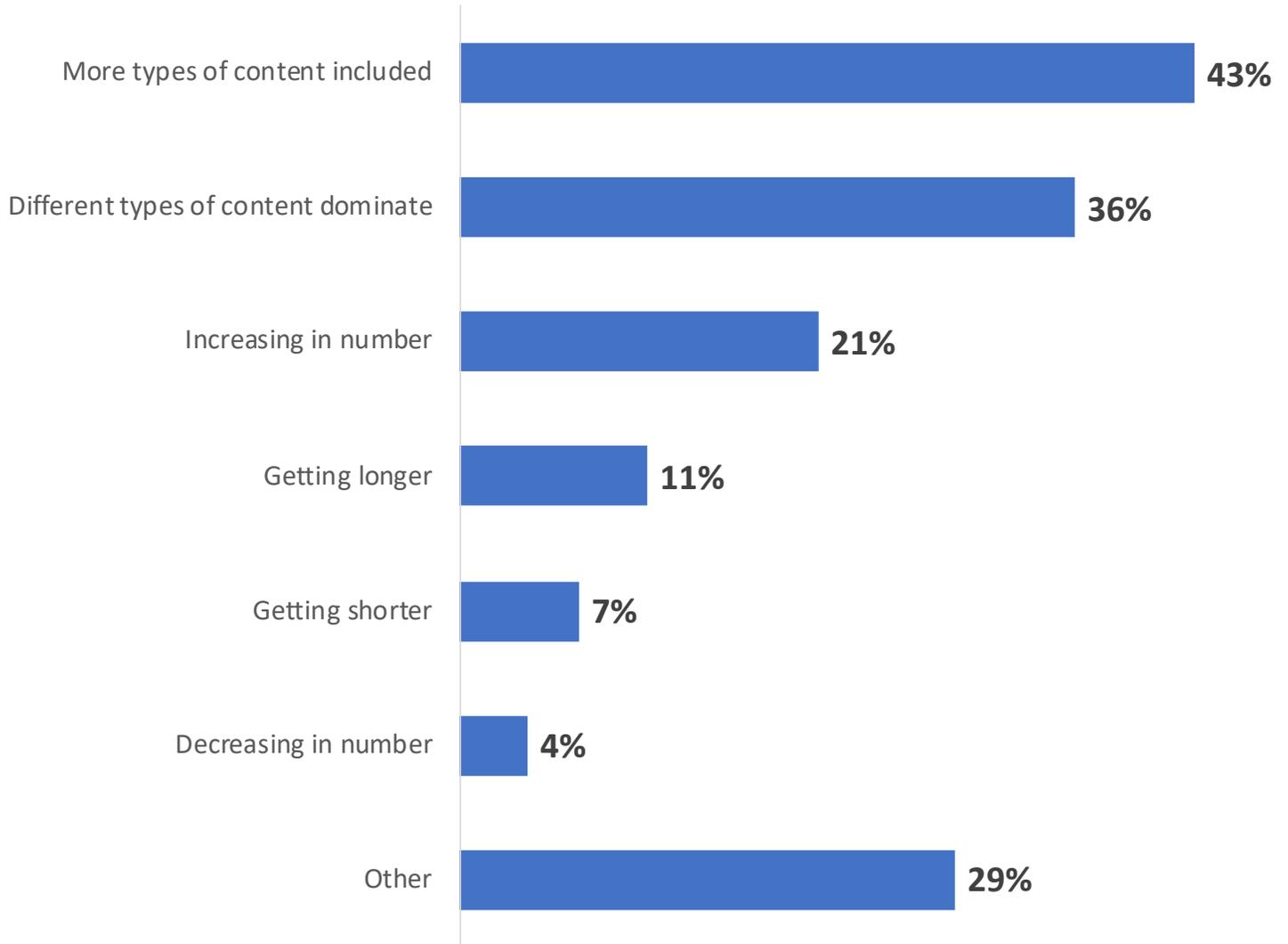
The most crucial ebook attributes identified by the 29 respondents were price, multiple-user access and accessibility (accessible by people who have disabilities). In other words, respondents valued price and accessibility to content above all else, with the business model and DRM-free rankings just behind. 17% of the respondents stated that their decision to what ranked the most important reflected a change at their institution in the last six months.



Resource lists increase in range of content types

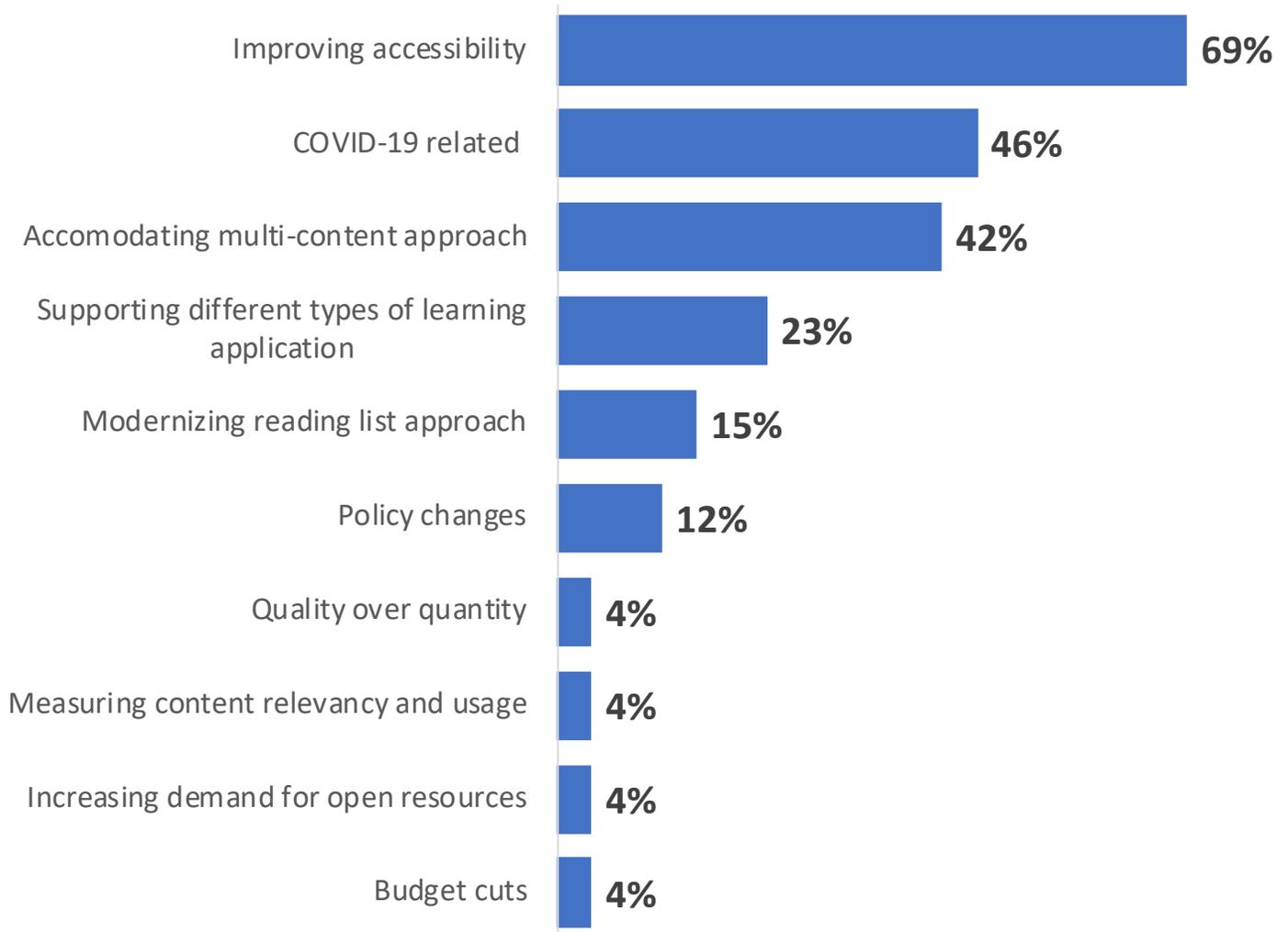
93% of the survey respondents agreed that resource list application was changing at their institution. The highest step-change by 7% was more types of content included – closely followed by different types of content dominate.

From the 28 responses, “Other” was cited eight times and focused on changes in the reading list process. In order of popularity, these included the adoption of resource list service providers, lack of adoption by users, increase in e-resources, the impact of the COVID-19 pandemic and one listing no change.



Improving content accessibility is the main reason for resource list changes

10 specific themes were identified across 26 respondents about the reasons for the reading list change. These included the significant impact of COVID-19, the demand for multiple content types and most significantly improving accessibility of the content needed through improving interoperability, visibility, virtual/blended learning, as well as policy changes, decolonization of the curriculum, and the shift away from print – including the need to quarantine print resources due to COVID-19 restrictions.

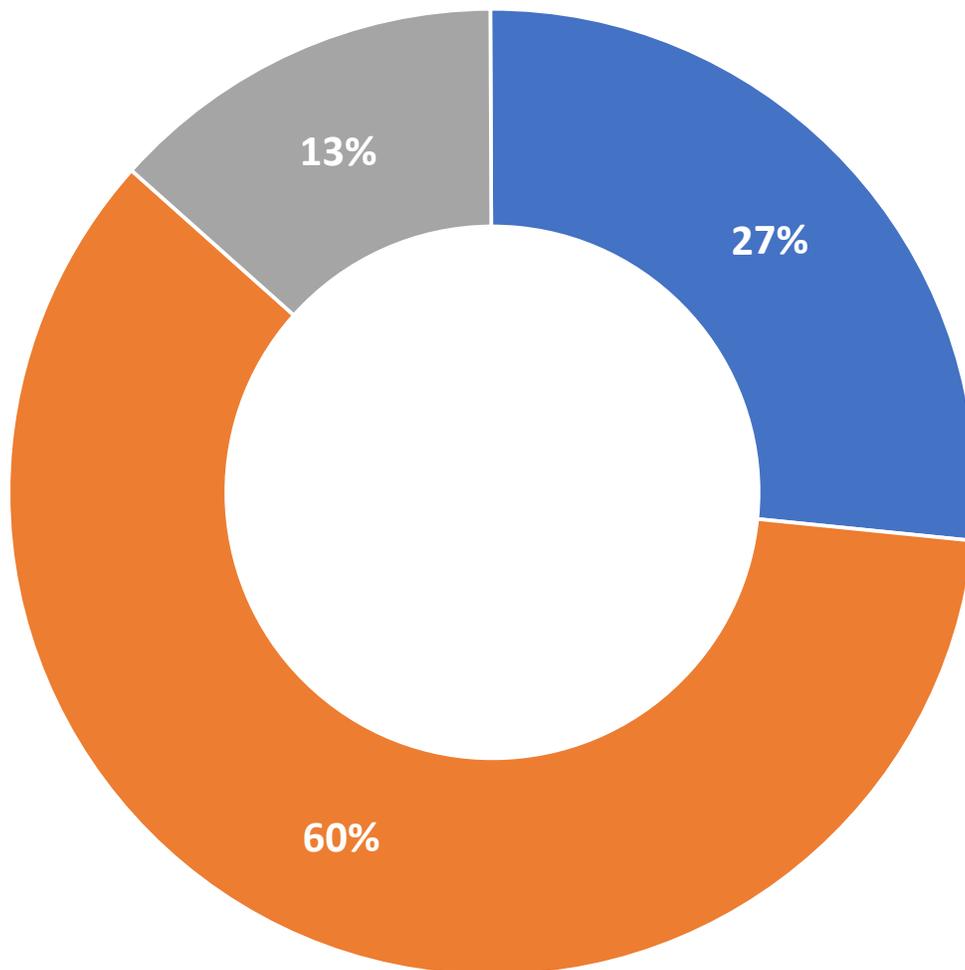


Secondary reading materials given low priority status

Of the 30 respondents, 60% rated that secondary reading materials may be purchased but are given low priority. Only 27% stated at secondary reading materials are always purchased.

“Other “comments of note:

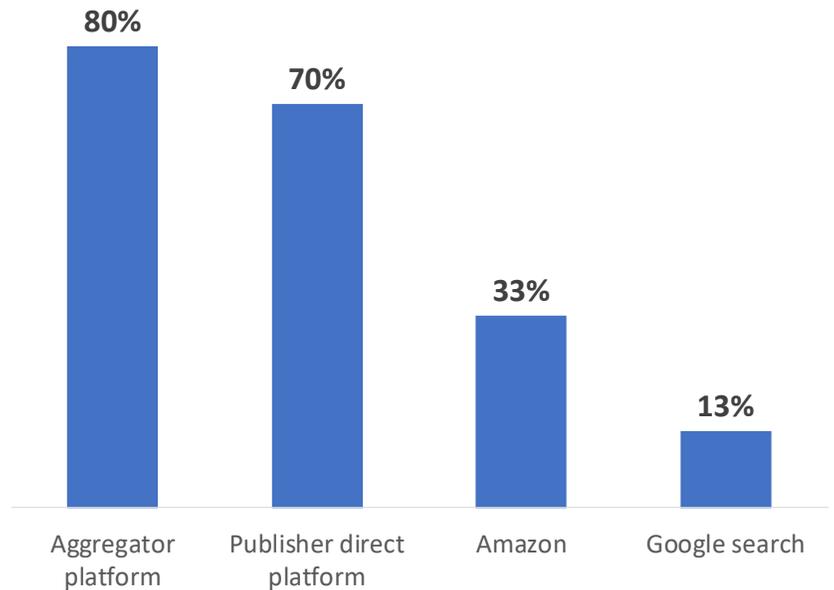
- “On reading lists, essential and recommended reading are always purchased. Further reading titles are added to DDA schemes. Non-resource list requests are dealt with via separate schemes and are either purchased or satisfied via ILL”.
- “Students required to read widely, very few “adopted” texts on reading lists”.



- Secondary reading materials are always purchased
- Secondary reading materials may be purchased but given low priority
- Other

Aggregator platforms most popular to check ebook availability

Aggregator platforms stand out as the service used most by the 30 respondents to check ebook availability with publisher platforms 10% behind. Google search ranks the least with 13%.



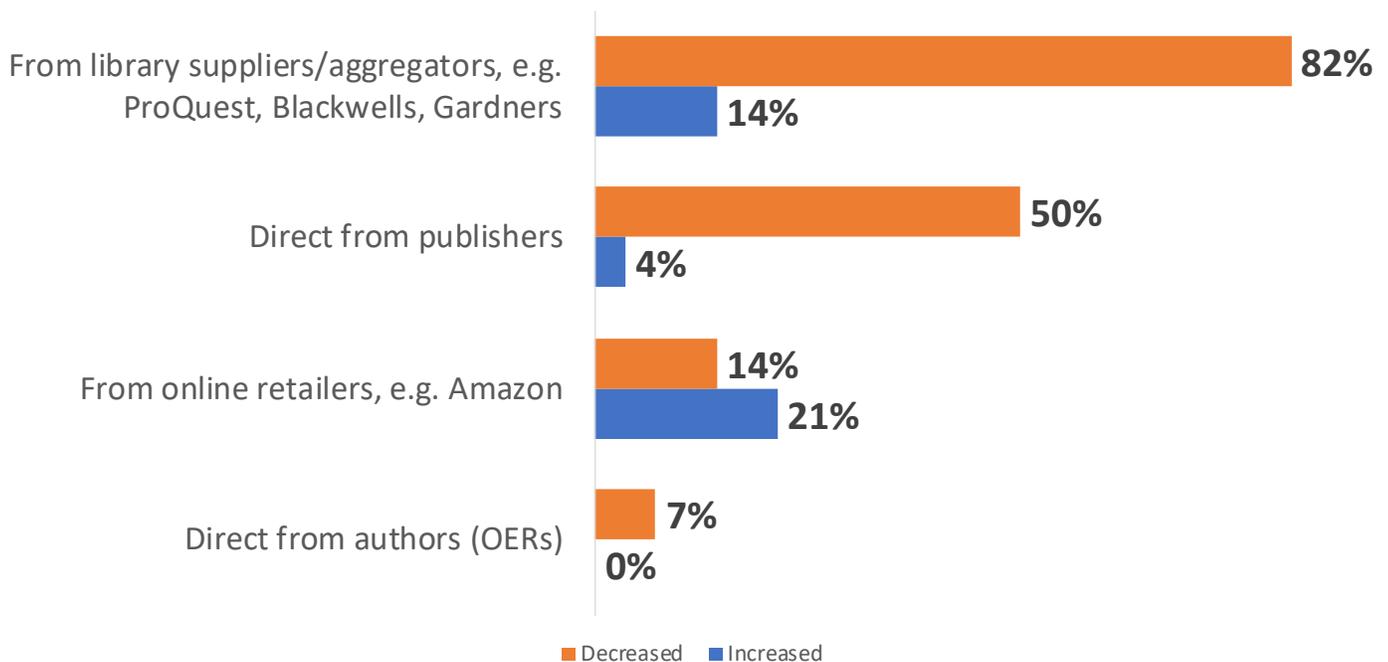
Aggregators and library suppliers first choice for ebook purchases

82%

of the 28 respondents said that the biggest increase in their institution's ebook purchases over the last six months was through library suppliers and aggregators. **Only two respondents chose to go direct to authors as an option.**

21%

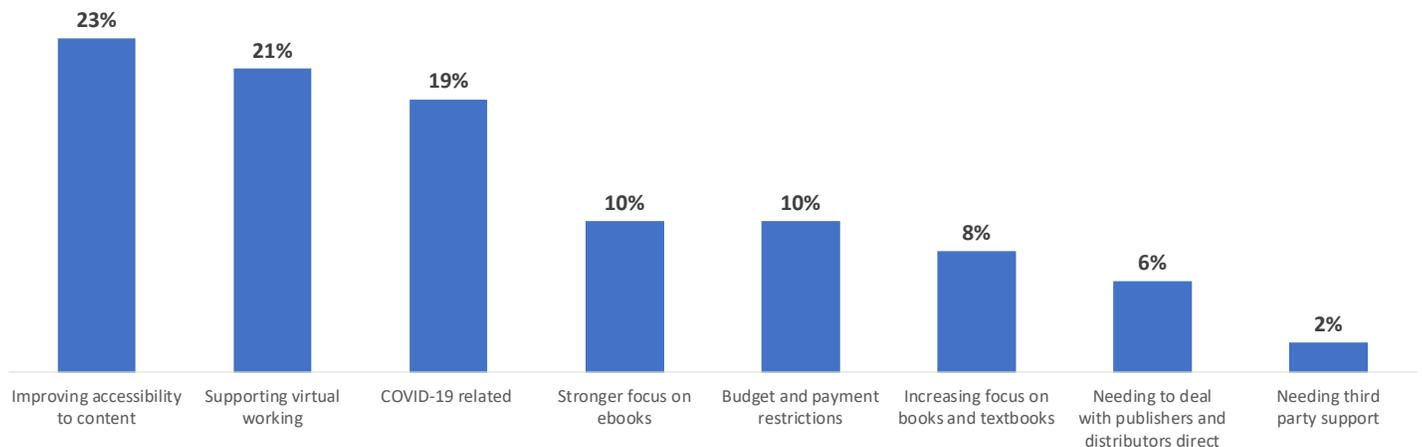
stated that online retailers like Amazon saw the biggest decrease. The average split across increases and decreases in ebook purchases noticed an **80% increase compared to a 20% decrease.**



Accommodating the mix of content to matching demand is challenging

Improving how ebooks are purchased has had a significant impact on purchasing. Eight themes were identified around the changes in ebook purchasing for the past six months with the top three around improving content accessibility, supporting virtual working and the COVID-19 pandemic. Libraries are finding it challenging to source the diverse mix of content they now need from aggregators and are sometimes turning to publishers direct. This adds additional complexities to their workflow and supply chains, as well as an abundance of access models and licenses.

A couple of respondents noted a freeze of any purchasing that now needs CEO approval and credit card restrictions preventing purchases from online retailers.

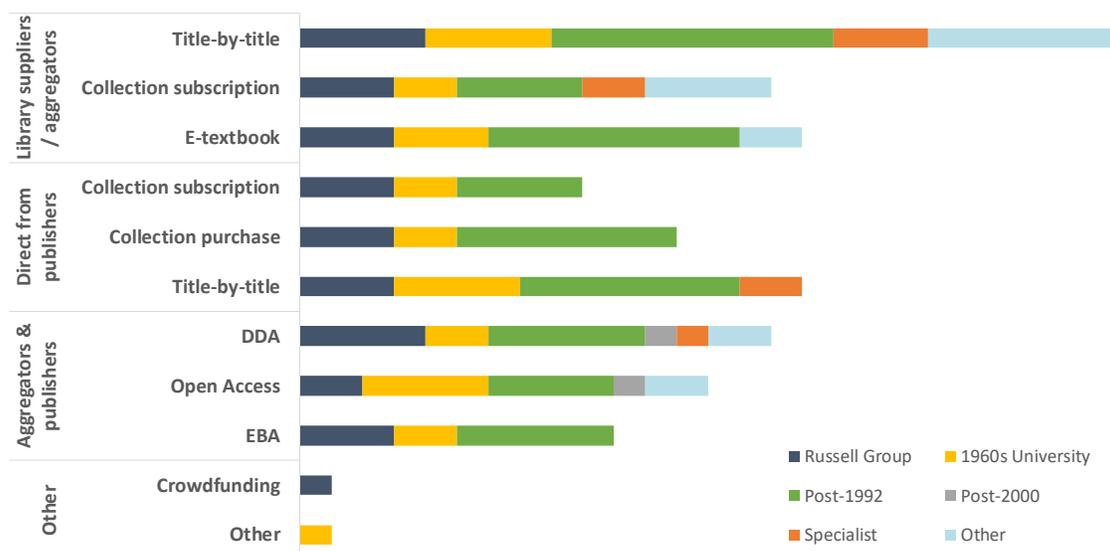


Aggregators and library suppliers rank the highest for ebook purchase models

87% of the 30 respondents chose multiple ebook business models that they would expect to use in 2020-21 academic year. Over half (57%) chose at least three business models they predict to use.

The most popular choice was title by title from library suppliers/aggregators at 87%, and title by title from the publisher (53%) and etextbook aggregator (53%) falling in second and third place respectively. Crowdfunding falls at the lowest rated at 3%. One person chose “Other” as they were considering a publisher collection but not decided.

In terms of popularity, library suppliers and aggregators received the majority vote at 43%, with publishers and aggregators at 29%, and direct from publishers following closely behind at 28%.



Barriers to access identified

In addition to the survey questions, 40% provided additional commentary summarized below:

- Due to impact of COVID-19, we needed to move to a larger subscription package to accommodate increased demand in ebooks and required to consider etextbook aggregators for the first time which have become more available over the first six months of the pandemic.
- Publishers can be a barrier to access through unfeasible pricing and lack of institutional availability of content.
- Preference for purchase not subscription, and instant access for users.
- Impact if the supplier goes bust.
- Ebook and etextbook publisher models need to change to be more sustainable for libraries, and the price increased when the library is in the midst of processing agreements.
- Lack of book spending due to pandemic. Took out a new subscription to ProQuest Academic, which is proving really popular and helping relieve stress from the primary physical collection.
- Flexibility to move money around budgets.
- Publishers rebranding ebooks as etextbooks and moving to unsustainable subscription models.
- Lack of trust in suppliers and publishers and increased desire for OA.

“The ongoing pandemic has had a huge influence on what we purchase and how we purchase it.”

“Now more important [is] that our users have ‘instant access’ to book content rather than access to an on-site physical curated collection.”

Conclusions

The research carried out for this survey has shed light on several interesting trends:

- The COVID-19 pandemic has been hugely impactful at the library level, and across institutions as well as the industry and the world, and continues to be with higher demand on electronic resources and remote access.
- Journals, databases and books spend were on the rise, and spend on multimedia and other services decreasing – specifically print which had taken a dive.
- More diverse content is being requested.
- Print considerations now incorporate having to quarantine resources and make them safe for the library team and continued distribution.
- Almost all UK academic libraries bought ebooks from aggregators and library suppliers; 50% purchased them direct from publishers.
- Etextbooks were more in demand with a noticeable increase around use of etextbook aggregators since the pandemic hit.
- Etextbook spend was mostly covered by the books budget as standalone or combined with another budget.

“We took out a new subscription to ProQuest Academic Complete which is proving really popular and helping to relieve the stress on the main physical collection.”

- When looking at budget allocation in the next three years, content accessibility, sustainable book budgets and an increased focus and spend on ebooks were top of the list.
- Budgets need to be more sustainable including balancing the budgets for print and electronic needs and future-proofing budgets.
- More content types and access are now being requested directly or added to reading lists.
- Types of purchase models and licenses can often be restrictive and limited to single use – specifically at publisher level.
- Price, multi-user access and content accessibility were ranked as the most important ebook attributes.
- Resource lists continue to evolve at institutions to accommodate more content types and more faculty needs.
- Increased adoption of resource list service providers to help formulate a more solid strategy and measurement.
- The main reason for changes in resource lists was improving accessibility to content following the ripple effects of COVID-19 like supporting more virtual learning and budget challenges.
- Libraries are adopting multiple ebook business models to accommodate their needs.

The research also reveals several points of concern:

- Some content is not available through aggregation and therefore libraries have to go direct to publishers adding to their workflow and supply chains, with an abundance of access models and licenses – often limited.
- Business models and licenses are not always fit for purpose and do not offer flexibility e.g. lack of multi-user access.
- COVID-19 pandemic has affected spend, frozen budgets for some and ways that libraries pay e.g. credit card transactions prohibited so it is harder to pay for content through online retailers such as Amazon.
- There is a lack of understanding and transparency around the price points and production costs of print books versus ebooks leading to distrust.
- Print continues to decrease in terms of acquisition spend.
- Pricing of ebooks and print equivalents are viewed as disproportionate.

The analysis demonstrates the importance that aggregators and library service providers play in simplifying library processes offering more flexibility to match their needs:

- 80% check aggregator platforms for ebook availability – the most popular choice.
- 82% stated the biggest increase in their institution's ebook purchases over the last six months was through library suppliers and aggregators.
- The most popular ebook business model is title by title from an aggregator at 87%
- Comparing popularity of publishers, library suppliers and aggregators, publishers and aggregators, library suppliers and aggregators received the majority vote at 43%.

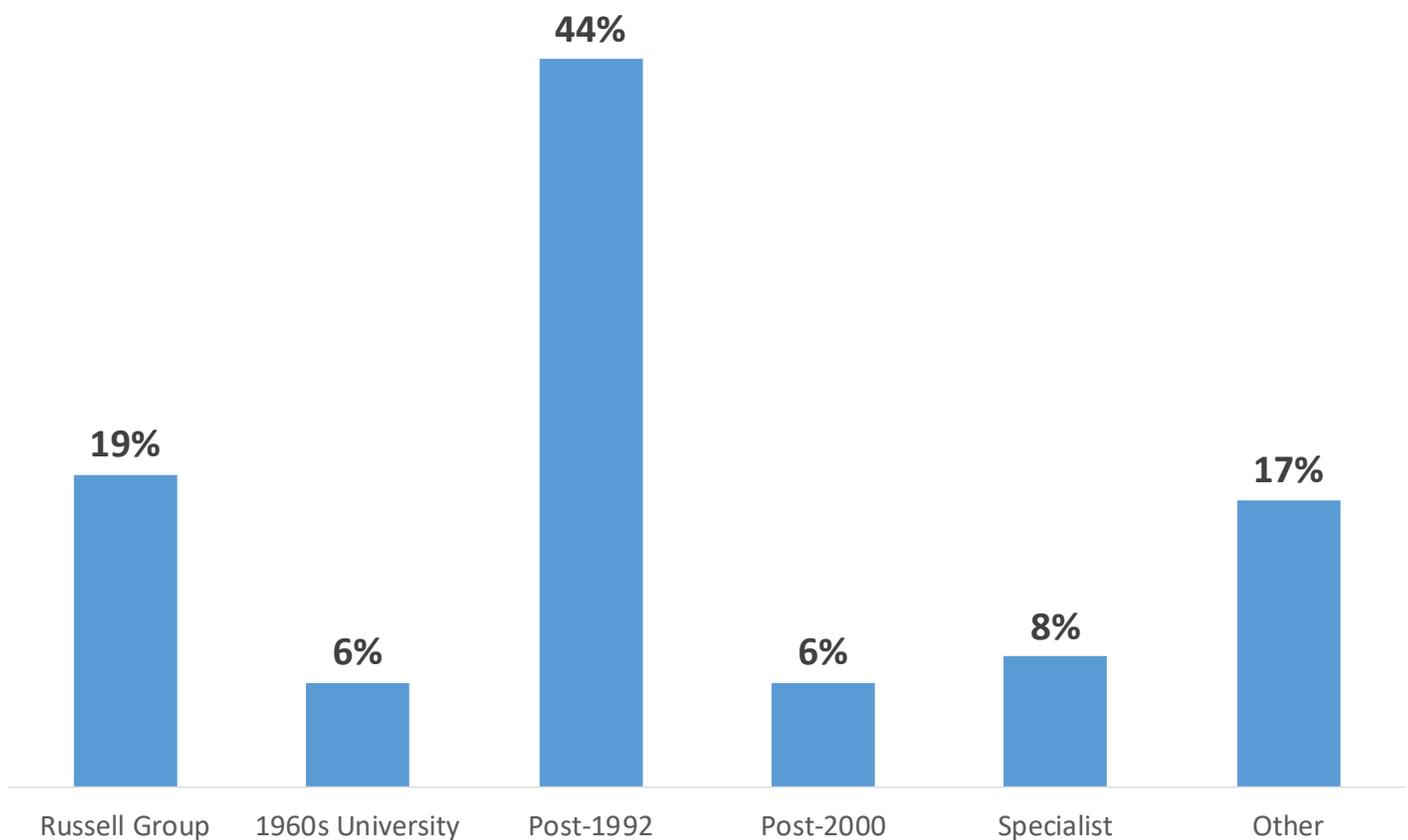
Appendix: Survey detail and demographics of respondents

Pre-COVID-19 pandemic survey

The first survey launched on 28th January 2020 and closed 17th February 2020. The link was sent to approximately³ 850 UK librarians directly and via social media. 65⁴ responses were received, giving a response rate of 8%. To bring in independent expertise, ProQuest commissioned Gold Leaf to manage the first survey and summarize the results.

Types of institution represented

The respondents were based across the whole spectrum of UK Higher Education Institutions. The numbers of responses received for each type of institution was roughly proportionate to the total numbers of institutions in each category.

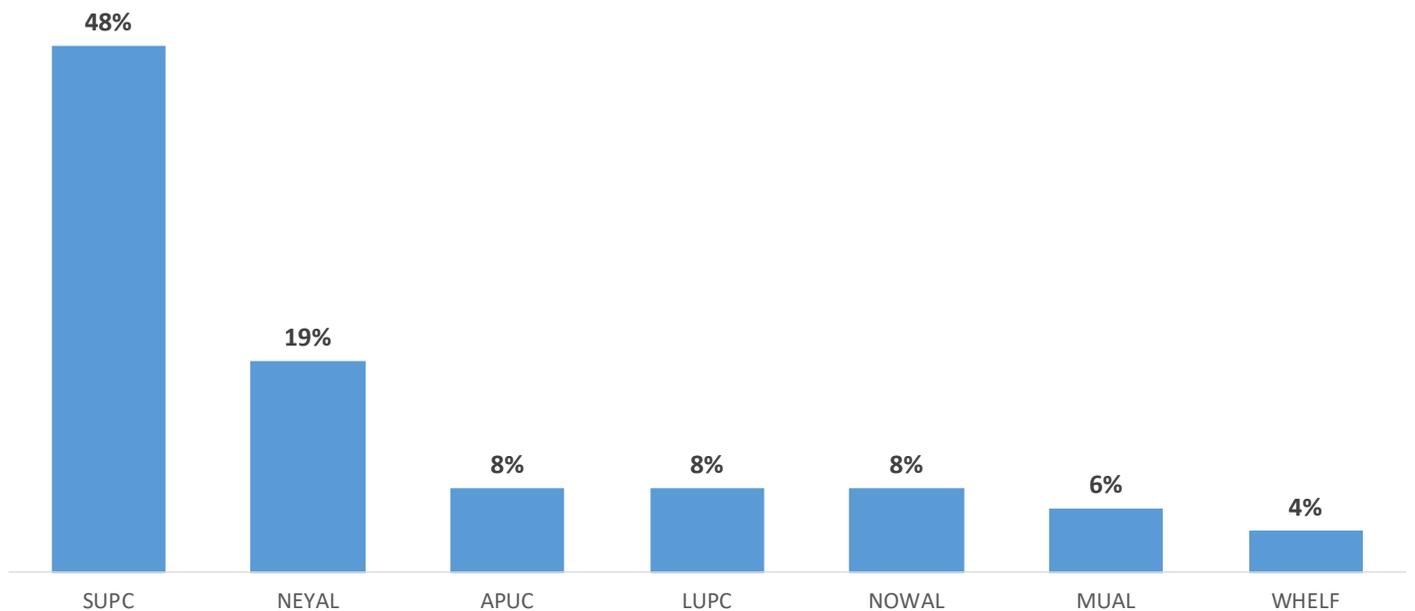


³ It was sent to both ProQuest and Gold Leaf contacts, so there will have been overlap.

⁴ Overall, there were 65 responses, but two of them were from Ireland and one was not a librarian but a distributor, so therefore three didn't qualify, and were not included into this analysis.

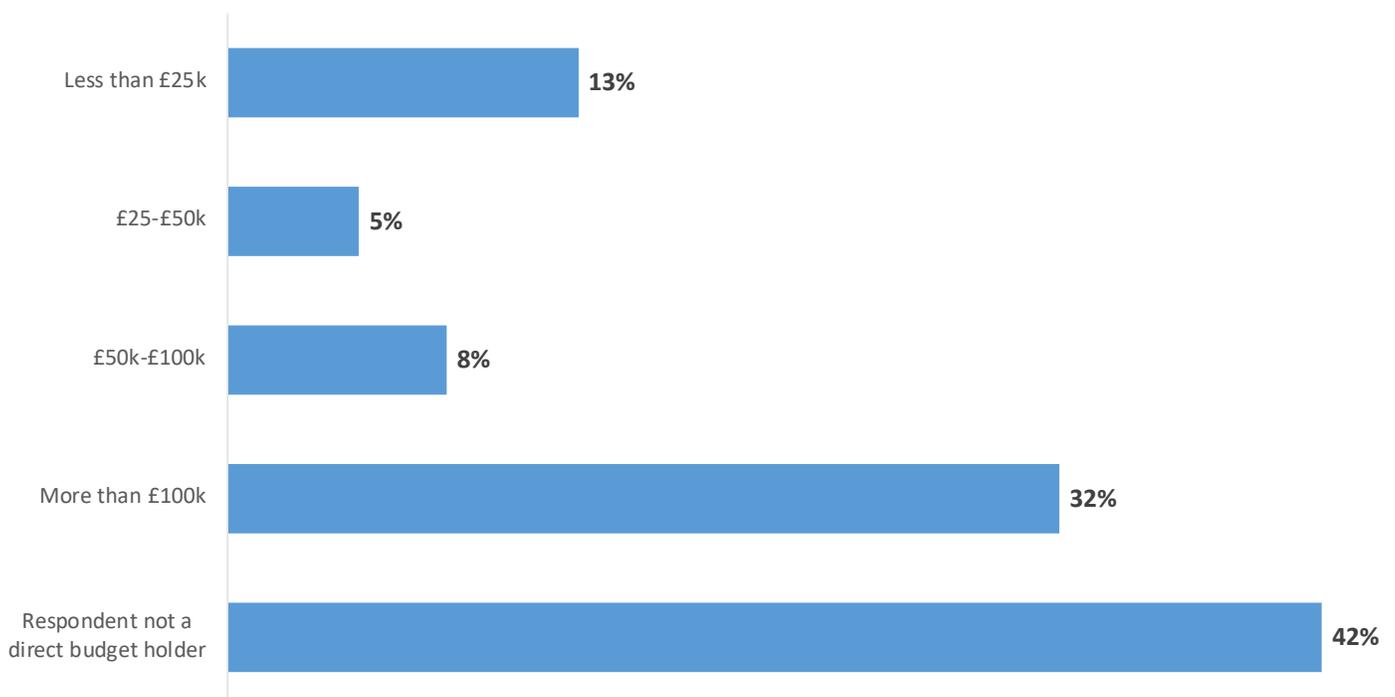
Membership of consortia

82% of respondents said their libraries belonged to a consortium. If they belonged to more than one, they were asked to choose the consortium that was most important to them. The split was as follows:



Library budget holders across the UK provide insight into books acquisition

58% of the survey respondents were budget-holders; most of those who weren't budget-holders said they still influenced ebook choices indirectly.

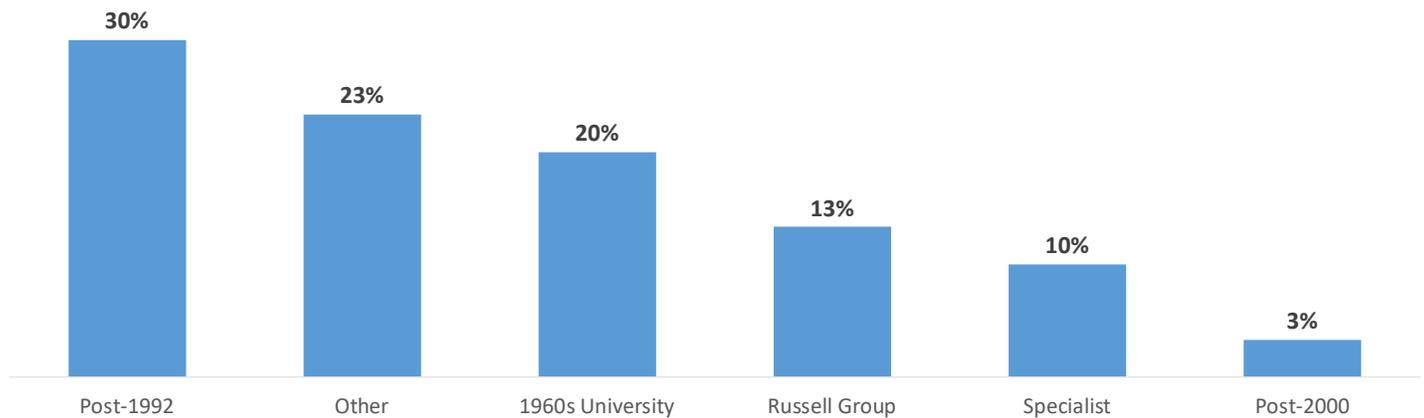


Post COVID-19 survey once pandemic had hit

The second survey launched September 2020 and closed October 2020. The link was sent to approximately 800 UK academic librarians directly and via social media. 33⁵ responses were received, giving a response rate of 4%. The respondents of the second survey were different to those of the first survey therefore direct comparison between the two is based on the authoritative view across the UK academic library landscape. To bring in independent expertise, ProQuest commissioned The International Bunch to summarize the second survey and conclude the whitepaper.

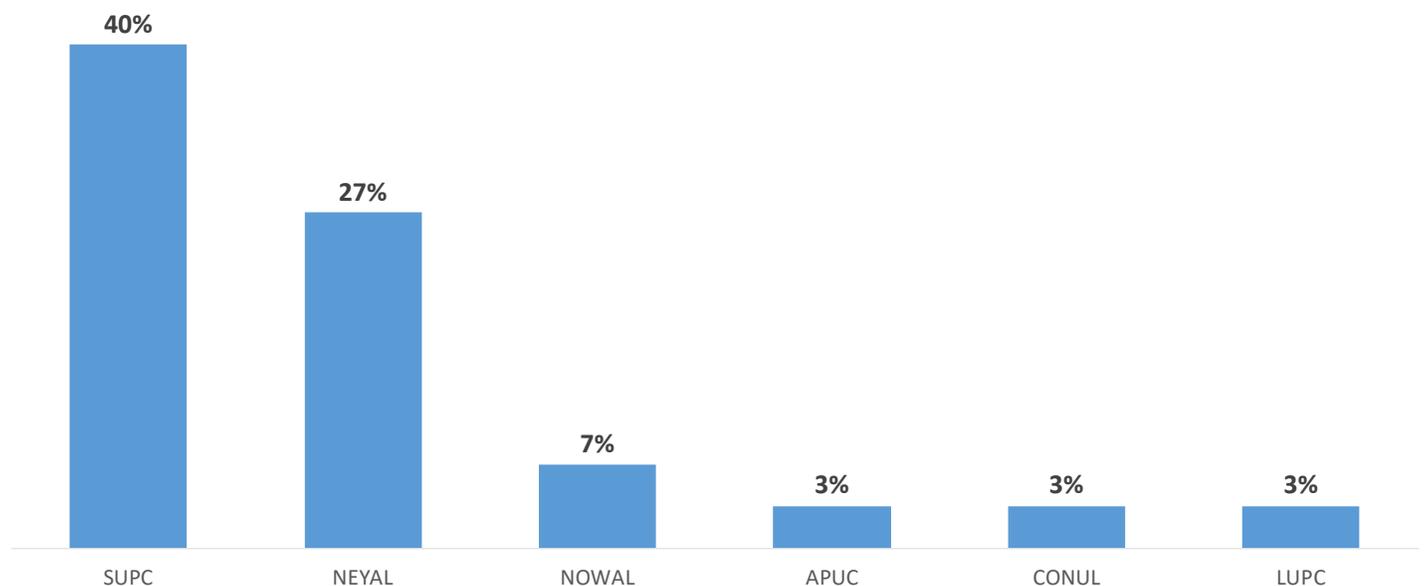
Types of institution represented

30 respondents were based across the whole spectrum of UK Higher Education Institutions. Those in 'other' mentioned college with higher education provision, further education college, independent, NHS Trust, research institute and secondary school.



Membership of consortia

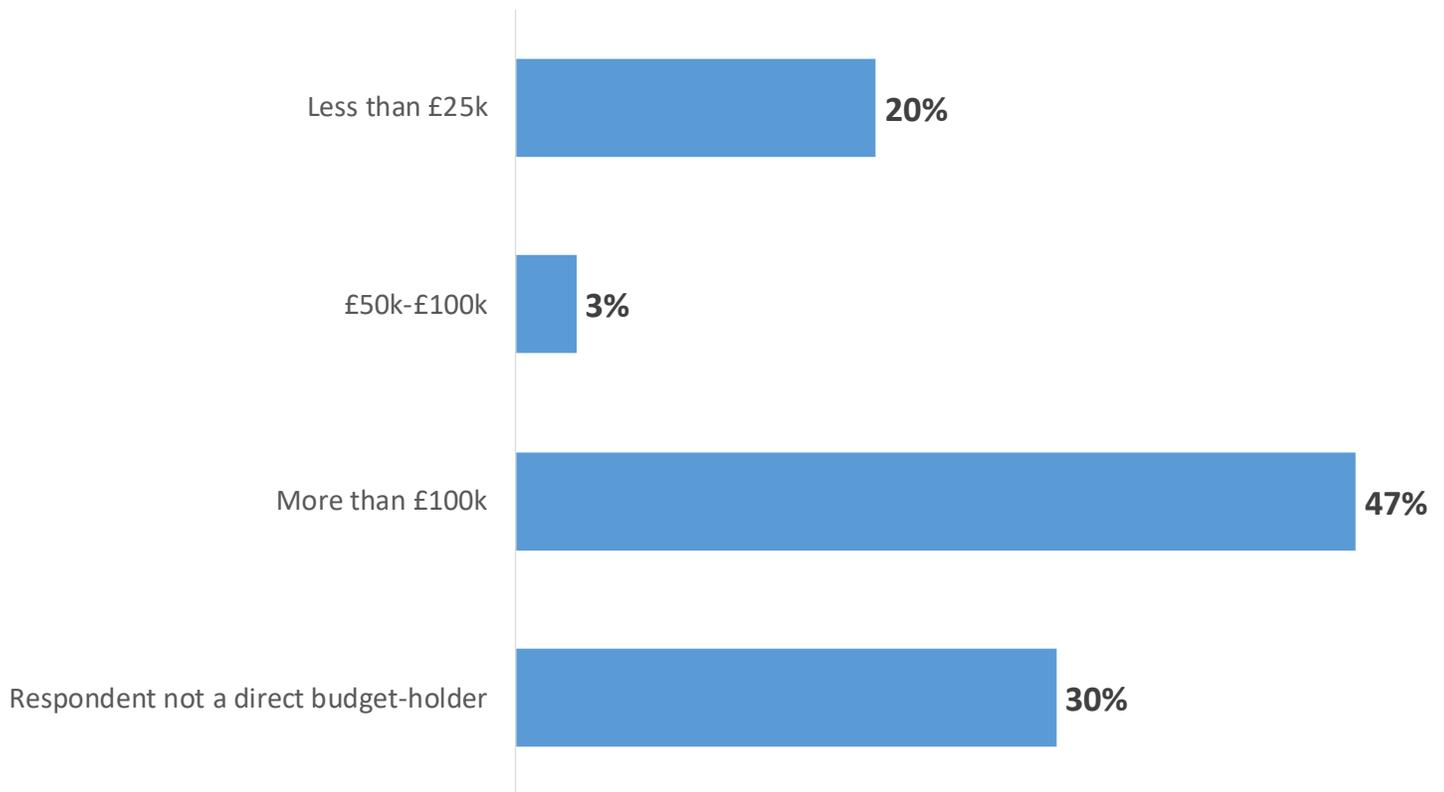
83% of respondents chose their leading consortium. The split was as follows:



⁵ Of those 33, 30 qualified as part of this survey. For those three that were omitted, one was in Ireland, one was at a membership body and the other one was a society. Two respondents were from the same institution but still counted as individual responses.

Library budget holders across the UK provide insight into books acquisition

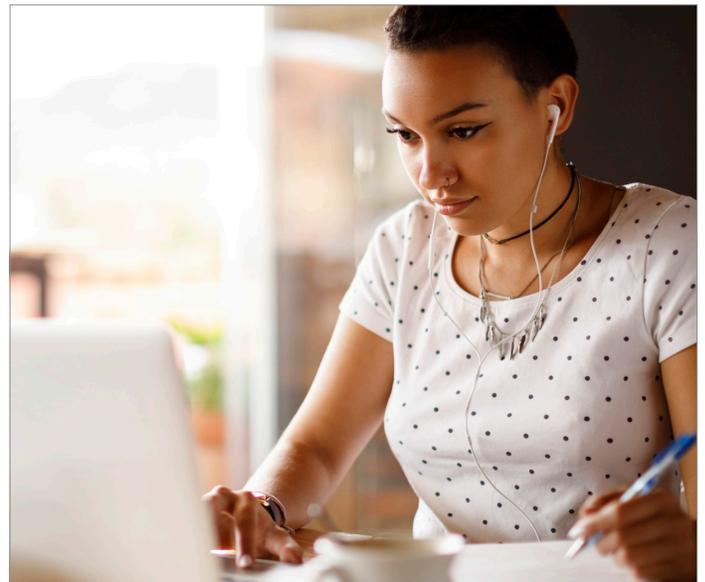
Of the 30 respondents who completed the survey, 70% were budget holders with 47% had a personal spend of more than £100,000.



About ProQuest

ProQuest supports the important work in the world's research and learning communities. The company curates six centuries of content – the world's largest collection of journals, ebooks, primary sources, dissertations, news, and video – and builds powerful workflow solutions to help libraries acquire and grow collections that inspire extraordinary outcomes. ProQuest products and services are used in academic, K-12, public, corporate and government libraries in 150 countries.

Along with its companies and affiliates Ex Libris, Alexander Street, and Bowker, ProQuest helps its customers achieve better research, better learning and better insights.



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