

INGENTA PCG LIBRARY SURVEY FINDINGS AND SUMMARY

Amid the COVID pandemic and the accompanying uncertainty and confusion regarding the future and shape of education and research, Ingenta PCG took the opportunity to ask about the experiences and impressions of the library community. Our purpose was twofold: to learn how libraries are pivoting to handling services during and after lockdowns that forced them to cease or reduce in-person operations, as well as to understand the ongoing demands and expectations they face in a more virtual learning environment.

We aim to use these findings to help our publisher partners understand what scholarly consumers of content want and need in the rapidly changing environment of education and research.

Open for Business

Of the institutions we spoke with, an increasing number of libraries throughout North America are reopening following lockdown in their regions, albeit most with slightly reduced hours and a smaller staff presence. However, the situation in South America is bleaker, with 61% of libraries still closed across the region, throughout Brazil. This is exceptionally challenging because researchers in those areas may have limited means for remote access.

Overall, the library community reports that the most significant challenge of the temporary closure of libraries is the need to support researchers and students who are working remotely. This includes acquiring resources previously obtained in print, ensuring seamless authentication for access to digital content, and managing increased demand for electronic resources. In addition, all of this is taking place against a backdrop of potentially smaller budgets for 2021 as the implications of enrolment numbers, redundancies, and the additional costs of remote infrastructure become clearer.

Demand for COVID-related Resources

Several institutions report an increase in requests for digital resources in the areas of pandemics, viral immunology, biology, and the life sciences. Almost half of the librarians we spoke with confirmed their institution is assembling collections related to COVID, although many are sourcing free or open research. Others are repackaging or promoting existing resources.

While funds for new materials are limited, some librarians report that requests in these areas are more likely to be granted. "This is not the best moment to request new materials, except if it is related to the research about vaccines and how to fight coronavirus," one said.

Shifting to Digital Resources

Most significant from our research is the finding that all librarians have reported an increase in demand for electronic resources as they move to a more virtual learning environment, making access to print materials is less feasible. As a result, many are prioritizing digital content in their budget allocations.

More specifically, most librarians informed us they have seen a sharp increase in the demand for e-books in part due to a need to access content in print books remotely. One librarian reported, "We have moved funds to prioritize e-books and video purchases, primarily to support courses that were not expecting or able to shift to remote coursework well."

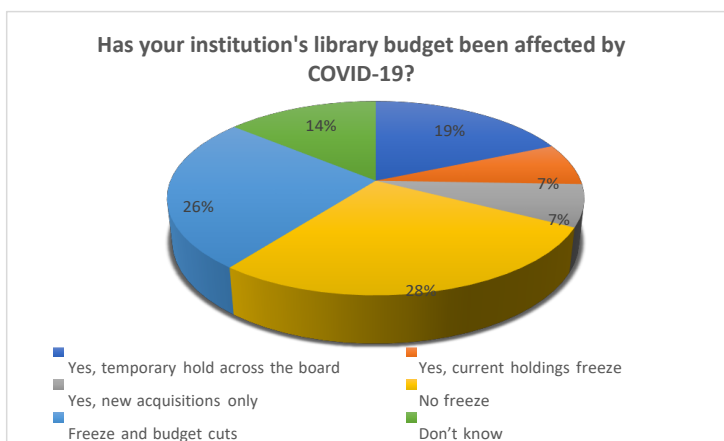
However, some librarians reported difficulties acquiring publications in the e-book format either because they aren't available digitally or aren't available in translation. This is also an issue with requirements for textbooks, with some librarians saying they struggle to source them not only in e-book format but also in foreign languages.

In another key trend, many institutions are reporting increased demand and requirement for streaming video resources. As consumers stuck at home become more accustomed to and reliant on the availability of on-demand streaming of TV, movies, and music, perhaps it was just a matter of time before the virtual learning environment was subject to the same expectation.

"The impact is really clear: internet and digital media have become mainstream in our library work, to the point where all new acquisitions are being made 100% in digital format, leaving print media far behind," said one respondent.

Budget Crunch

We also asked librarians about budget expectations. Although 28% told us they were not expecting a budget freeze, most expected some level of cut or freeze, temporary or otherwise.



There was no specific trend or consensus among respondents as far as budget planning for an uncertain future. Some are moving resources around to align with changing priorities and demand, while others are taking a "wait and see" attitude. Many say they are not experiencing cuts now but expect significantly limited financial resources in the coming fiscal year and beyond. One librarian sounded a warning: "The added costs and lost revenue of living like this will cause problems for the institution long after a vaccine is found."

Changing Preferences in Purchase Models and Options

It is apparent there is also a growing preference for one-time purchases than ongoing subscriptions due to budget constraints and uncertainty about the future—something that came up in the survey but also aligns with insights from Ingenta PCG's conversations with the library community over the past year.

While some libraries have encouraged faculty to select resources supported by an institutional license model for unlimited users or available through Open Education Resources, publishers face the challenge of helping libraries acquire content they need during a time of ongoing turmoil that impacts their ability to commit to a long-term or recurring deal.

Conclusion

The major takeaway from the survey is the demand for e-books and other digital resources over print. However, consideration needs to be made for non-English-speaking regions that are doubly struggling to access the content they need. Publishers should think about how they can make content previously only available in print accessible in digital formats as well as how to support non-English-speaking students and researchers with translations.

With more streaming content in demand, libraries and publishers need to address how best to facilitate and control access to it. Publishers might think about how to produce and deliver content in innovative ways, such as via podcasts, YouTube, or other streaming platforms.

The survey also hints at the larger and long-term effects of COVID-related disruption on libraries as well as education and research in general. Some respondents pointed out the pandemic helped prove the value and necessity of libraries and showed their ability to be flexible and versatile. Others noted that the move away from print and in-person learning could have major, unknown implications.

One thing is certain: with the growing expectation on libraries and institutions to serve their users remotely and the increased demand for electronic resources, it is more important than ever to ensure accessibility of content for a productive virtual learning and research environment. Working collaboratively to support this goal is fundamental to the continued success of scholarly research and instruction.