

Library Analytics: Shaping the Future – COVID-19 One Year Later: Trends in Library Book Acquisitions

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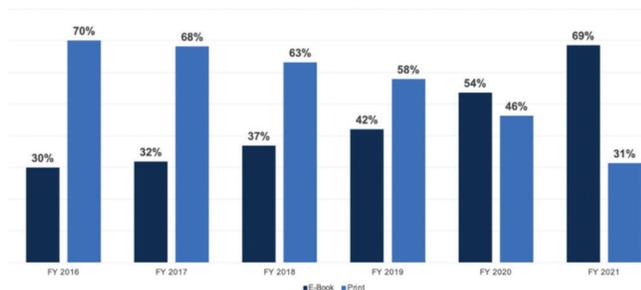
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For many of us, March was the one-year anniversary of when we shifted from in-person interactions to remote-based ones. In that time many of us have had to pick up new skills, and become Zoom ninjas, home school educators, amateur epidemiologists, semi-professional bakers and burgeoning hair-dressers. Like all segments of life, the academic book ecosystem has seen its fair share of change to meet these new demands as well. One thing we have learned is that this shift has not created new trends in the academic space but rather exacerbated and accelerated preexisting conditions. Let's take the biggest shift we have seen — the move to digital.

The Move to Digital

Figure 1: Percentage of Academic Acquisitions, E-Book vs. Print

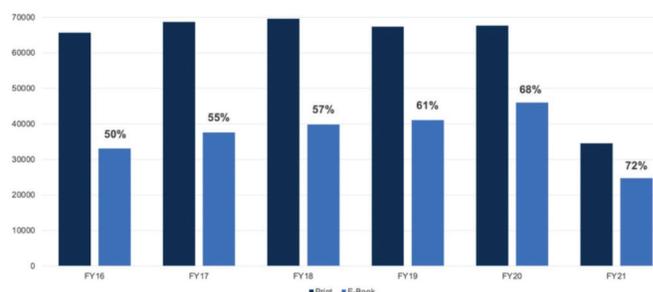


The impacts of remote learning can clearly be seen in the rapid acceleration in eBook acquisition. As librarians were asked to support distance and online learning, the format and subsequent utility became as critical as the work itself. With that said, the trend toward eBooks is a long-standing one, as seen in Figure 1. We had been experiencing a slow digital shift in the monograph space for years pre-remote life, and the groundwork done by publishers, platforms, library staff and vendors is what allowed us to leverage the potential of eBooks in order to meet the expanded needs and demands of online and remote learning. Pre-pandemic, the shift to eBooks had been trending up, but there were still significant pockets of resistance toward the widespread adoption of the eBook model. The reasons we had heard from librarians included: pricing, eBook availability, resource sharing concerns, perpetual access concerns, accessibility and perceptions of user preference. Those concerns didn't disappear, but the need to provide expanded access to online scholarly resources during the pandemic outweighed them.

Title Availability

Let's look at the most basic qualification for digital — what is available. GOBI data defines the world of academic content at around 70,000 titles each year from a selection of around 1,600 imprints worldwide. When we look at the number of those titles year over year, we see a concentrated effort from publishers to increase the available universe of digital content.

Figure 2: Simultaneous E-Book and Print Book Availability

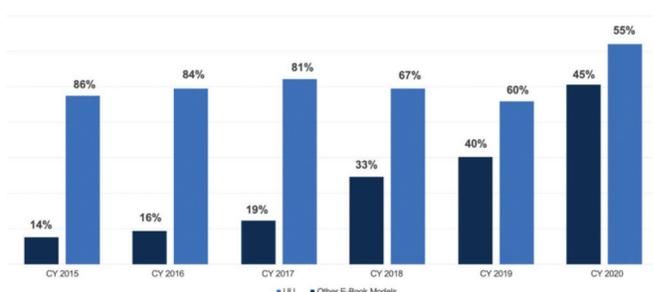


This effort has been incremental in facilitating the digital evolution we are undergoing today. Without publishers and content providers modernizing workflows to produce higher rates of simultaneously released print and eBook versions of titles, as seen in Figure 2, there would not have been enough content to drive the shift to digital. While it is impressive that 72 percent of all content is released in print and digital simultaneously (based on FY21 year-to-date data as of March 2021), we still have work to do, and our platform and publishing partners are well aware of this need and are working to continue closing the gap.

Model Availability

Another critical factor in the migration to digital, in addition to title availability, is model availability. Unlimited User (UU) access, particularly Digital Rights Management-Free (DRM-free) UU access, is the preferred access model by most libraries. DRM-free has significantly increased the portability and utility of eBooks. A DRM-free eBook is great for collaborative work, increasing accessibility, and eliminating turnaways and many patron pain points, to just name a few benefits. Similar to the increase in simultaneous availability of electronic and print, we have seen significant increases in what is available as DRM-free UU. Nowhere is that clearer than in the acquisition trend shown below:

Figure 3: Percentage of Unlimited User E-Book Acquisitions vs. Other E-Book Models



DRM-free UU was originally only available from a handful of publisher direct platforms, but as eBook usage and acquisition became more prevalent, publishers heard and understood the need for expanding DRM-free access and they acted accordingly. In a very short time frame, we went from having tens of thousands of eBooks available DRM-free to well over 1,000,000. These efforts led to DRM-free works being readily available when the demand for digital resources to support distance and online learning spiked during the pandemic.

Shifts in Approval Profiles

Since we work directly with libraries around the world, we have a front-row seat to the shifts and changes that the pandemic has brought. The need to deliver resources in an online format has been one of the main drivers of decisions that affect book and slip approval profiles, monographic acquisitions, and other acquisitions models. When it comes to approval profiles, before the pandemic we saw a slight preference for print preferred, followed by profiles with a mix of print and electronic, with ePreferred taking the preference in most Library of Congress (LC) classification ranges, and finally fully ePreferred. Today we see most libraries having some type of ePreferred setting, whether that be across the board or a mix of LC classification ranges with print moving from a slight majority to the least preferred option. There are exceptions where schools remain print preferred, such as law library profiles and smaller library slip profiles. In those cases, libraries are making the choice on the version at the point of order, where we also see the shift of firm orders leaning more toward the electronic format.

Library staff spent a lot of time this last year reviewing their profiles to make informed decisions on the implications of shifting from print-only or mixed-format to ePreferred. Sarah Hoke, Collection Development Librarian at Harvard Widener Library, said,

“looking at our approval plan output was just one piece of our activities to ensure that patrons still had as much access as possible to our collections during the pandemic. It made sense for us in two main ways: first, in serving our patrons by providing easy and timely access to new materials whenever possible; and second, from a staff perspective of allowing a safer, off-site workflow for electronic material — and reducing the backlog to work through when we could again handle print receipts on-site. By making this decision early in the pandemic, it allowed us to better focus on the other demands of our patrons, such as requests for

older materials in digital format, especially for course support and research needs. It also met our initial goals in terms of workflow and access, so definitely considered a success in that perspective.”

Shifts in Acquisition Models

In addition to library staff making a shift in their approval plan logic, some chose to make shifts to models that allowed greater access during a time when students weren't physically on campus. We saw the broader use of Evidence-Based Acquisition (EBA) models. In many cases, libraries chose to shift funding from approvals or firm order allocations to EBA models to provide more comprehensive coverage and access to a given publisher's content. One library that made this shift was Syracuse University. Rachel Fox von Swearingen, Interim Collection Development and Analysis Librarian, said that the “Syracuse University libraries began adopting EBA and DDA eBook models a few years ago. Before the onset of the pandemic, one of our collections goals for 2020-2021 had already been to explore at least three additional EBA or DDA plans. The sudden transition to all online learning in March 2020 made that goal a more urgent need, and we chose to begin a Taylor & Francis EBA program through GOBI in summer 2020. Our EBA programs have allowed us to provide eBook access that duplicates our print stacks but still direct our current year's monograph spending ultimately toward purchasing perpetual access to new titles and to titles with proven use. As we investigate transitioning more of our monograph budget to EBA or DDA models, we feel that, in many ways, 21st century library collection development bears more resemblance to managing an investment portfolio than building a title-by-title list of monographs and serials to acquire.”

What Comes Next?

In this article, we laid out some indicators — increasing eBook availability, increasing DRM-free availability, shifting approval profiles, wider adoption of emerging models like EBA, and wider spread eBook acquisitions — and we could go on to share another 50 data points if we had the time and space, but the most pressing question that we are asked is, simply, “what comes next?” While we do not know for sure, what we can say with confidence is it will differ across each and every library. We know each library has unique drivers and requirements for publishers and vendors, and we need to be prepared to support and adapt to those varied needs. The indicators point to a large reliance on digital materials in the future, which is reinforced by historical trends. This seems a safe assumption, but if our years of experience have taught us anything about the library space it is that choice, flexibility and collaboration are paramount as we move toward a more format-agnostic future. This year we all saw significant change, for better or worse, but the most positive and successful change came from collaborative efforts across the academic books ecosystem. Library staff, publishers, content providers, aggregators and vendors all pulling together, focused on a sustainable future state. So, with that in mind we ask that very question to you: what comes next, and how can we carry forward the momentum of collaboration and continue to work toward a more flexible and digital future? 🌱

