Springer

White Paper

A Survey of Global Library Trends

Highlights from Springer's 2014 customer survey
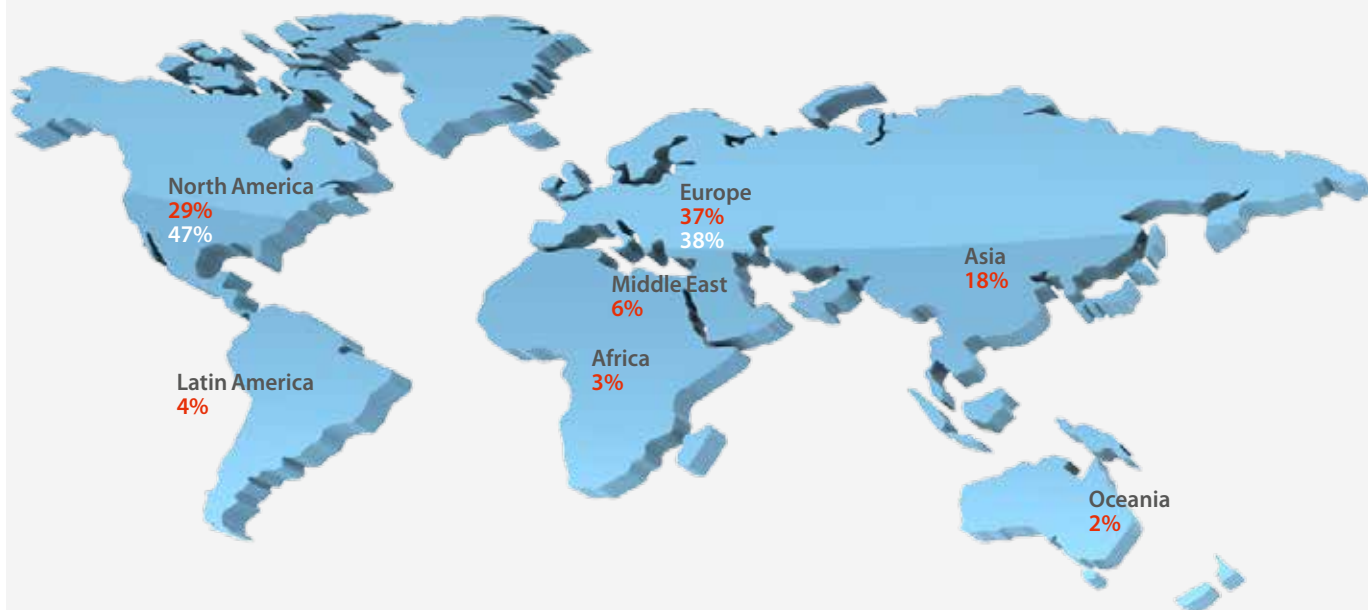
Key
Insights

A Survey of Global Library Trends

Like all publishers and vendors, Springer receives a regular flow of anecdotal feedback from its customers, who are spread around the world in all types of libraries. In order to formally capture this information and gain context for the major trends and issues that their customers are facing, Springer conducted a baseline survey of its global academic and government library customers in the fall of 2014.

Over 450 customers answered questions on strategic and operational issues focused on books and journals and long-term planning. Respondents were distributed as follows:

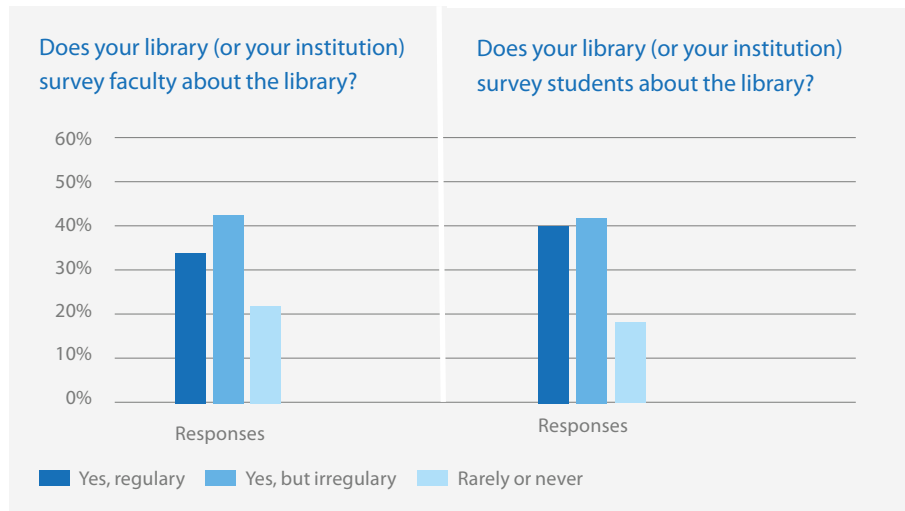## Global Distribution of SpringerLink Users

North America
29%
47%

Europe
37%
38%

Asia
18%

Middle East
6%

Africa
3%

Latin America
4%

Oceania
2%

Distribution of submitted surveys:

Percentages in white show the distribution of surveys returned (North America and Western Europe) Remaining participants primarily in Eastern Europe, Africa and Asia

Customer feedback is critical to Springer's strategic planning to ensure that the information and tools they provide are meeting the needs of the market. This report highlights some of the key trends learned from the surveyed librarians. To provide an independent analysis of the results and create this report, Springer engaged the services of Publishers Communication Group (PCG), an internationally recognized sales and marketing consulting firm.

Libraries Recognize the Value of Planning

Everyone seems to recognize the value of feedback to inform planning, as well as the time investment required to create, take and assess surveys. Like Springer, many of the librarian respondents want feedback from their constituents:

Does your library (or your institution) survey faculty about the library?

Does your library (or your institution) survey students about the library?

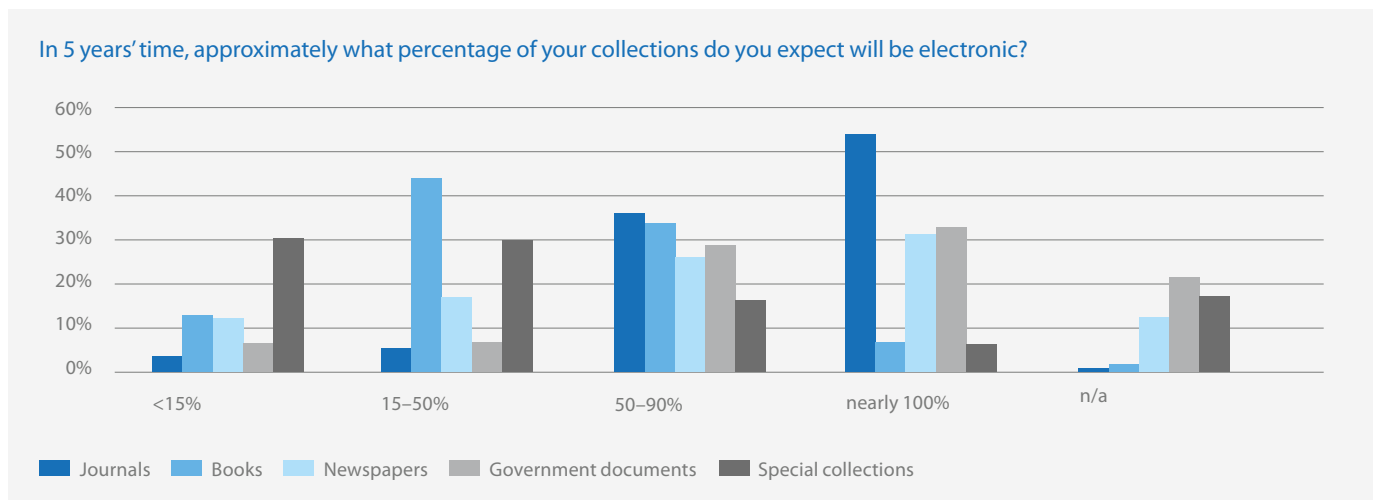Legend: ■ Yes, regulary   ■ Yes, but irregulary   ▢ Rarely or never

Similarly, formalized strategic planning is undertaken by nearly 70% of the survey respondents.

The Future of the Library: The Next 5 Years

The first survey question asked respondents to 'fill in the blank' with their thoughts on the future state of the library. The responses were varied in type and tone, with some statements more optimistic than others. The two common themes were the anticipation of overall change in the library environment and the continued move to electronic resources.
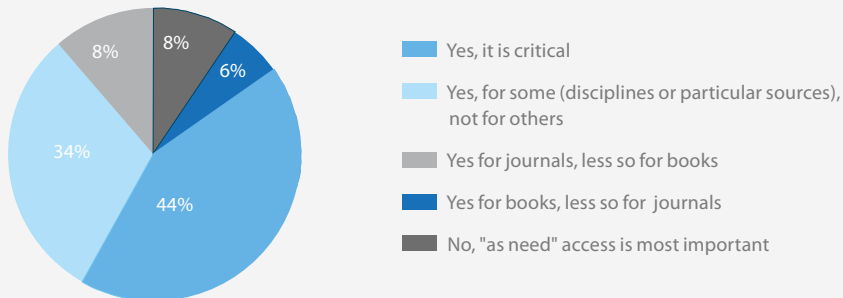
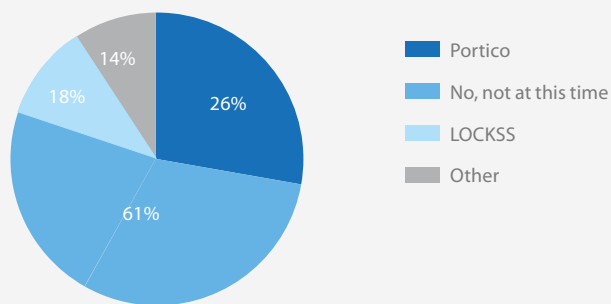Among the emerging trends:

The continued move to electronic

In 5 years' time, approximately what percentage of your collections do you expect will be electronic?

Legend: ■ Journals   ■ Books   ▢ Newspapers   ▨ Government documents   ■ Special collections

Preserving the scholarly record

Do you participate in digital preservation initiatives?
(choose all that apply)

- Yes, it is critical
- Yes, for some (disciplines or particular sources), not for others
- Yes for journals, less so for books
- Yes for books, less so for journals
- No, "as need" access is most important

8% · 8% · 6% · 34% · 44%

Do you participate in digital preservation initiatives?
(choose all that apply)

- Portico
- No, not at this time
- LOCKSS
- Other

14% · 18% · 26% · 61%

The evolving library space

How do you anticipate the physical space changing in your library over the next 5 years? (choose all that apply)	
Anwser Choices	Responses
We expect a substantial change to our physical space, either through renovating the existing space or by adding more on-campus space	**33.5%**
We expect the space needed for physical collections (on or off site) to increase	**12.9%**
We expect less space devoted to on-site physical collections	**46.5%**
We expect increase collaboration, quiet study and/or technology space	**55.0%**
We expect our physical space will remain largely unchanged	**23.8%**
Other	**7.4%**

Collection as a core:

Do you see collections changing in importance as a key library service? (choose one)

- No, collections will remain a core library service for the forseeable future
- Collections are more important operationally than strategically
- Collections are more important than ever

How Common Are These Trends?

Springer wanted to understand whether the survey responses showing shifts in library collections reflect intentional changes, budgetary constraints or something else. A series of questions on business models, archives and Return on Investment (RoI) was included in the survey to show how librarians approach collection strategies for books and journals.

Some activities are quite common. Survey results showed:

- Approximately 90% participate in a purchasing consortium
- About 80% do cost per use analyses on electronic content
- Over 80% have purchased or leased archive journal content
- Nearly 65% of the respondents use a web-scale discovery service

Other influences on library collection exhibited more variety in the survey responses. Use of and satisfaction with eBook business models shows quite a range, for example:

- Respondents use all major eBook business models to acquire content, from large packages to demand-driven acquisitions.
- Quality of book titles outweighed overall price by a small margin as key factor in satisfaction with eBook business models.
- eBook format revealed no overwhelming preference: PDFs were somewhat more favored than even whole books

According to the survey responses, electronic journals still prove to be seen as a more stable long-term format than eBooks. Sixty two percent of respondents agreed that cancelling the print format in favor of electronic format is generally more accepted in journals than in books at their institution.

A final survey question asked if marketing support for the library from publishers and vendors is welcome: 60% said yes

How Are Libraries Addressing the Needs?

Broadening RoI analyses is becoming critical for both publishers and libraries to have meaningful data for operational and strategic planning. Beyond cost per use analysis, nearly 30% of the libraries in the survey also analyze how users are contacting the library. While basic analyses continue to be important, respondent feedback stated that reaching for the next level of RoI by making use of detailed user metadata can help librarians and publishers alike analyze the utility of resources for their patrons. Any data that can be made available at a more granular level would provide the opportunity to fine-tune both collection decisions and to allow for future accommodations for their users' habits.

In support of RoI and the author community, the survey shows that libraries are invested in seeing that content is well-used by their constituencies. A final survey question asked if marketing support for the library from publishers and vendors is welcome: 60% said yes.

There is clearly more work to be done. Springer will conduct periodic customer surveys to understand how these trends develop over time and to identify other global issues that impact the library. If your library is interested in learning more about the results of this survey or if you have ideas about how Springer can help with these trends, contact LibraryRelations@Springer.com

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