State of Academic Libraries

Survey Report: All Regions

Summer 2021

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State of Academic Libraries 2021

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Executive Summary

Welcome to the *Library Journal* report on *The State of Academic Libraries*, which summarizes responses from a worldwide sample of 1,843 college and university libraries.

This is an apt time to look at how academic libraries are responding to a decade of changes: from the ways in which students and faculty use libraries, to available resources and their evolving formats, to cultural and technological developments. The pandemic years 2020 and into 2021 have accelerated many of these changes, notably service to remote students. While most academic libraries had already been supporting distance learners, the sudden surge in distance learners after campuses shut down tested library networks and services in new ways.

Throughout the past decade, *Library Journal* has been tracking changes occurring in academic libraries, including the adoption of ebooks and affordable learning initiatives. One trend the pandemic altered involves ebook adoption and use. In the early 2010s, the adoption of eresources of all types in academic institutions took off, but by the end of the decade, the transition from print to ebooks slowed to an estimated 2% annually. In some cases, such as arts and humanities subjects, a print preference remained. In other cases, factors such as price, historical momentum and availability influenced adoption. However, a theme of the present survey is that numerous academic libraries are phasing out their print collections, with many indicating that collections will soon be nearly all electronic—not just to make collections available to distance learners, but also for health and safety reasons to help prevent the spread of COVID, in much the same way that restaurants have been shifting from print to QR code-accessible menus. Whether this will continue post-COVID remains to be seen, but it seems likely that increased distance learning is a trend that will persist even after in-person classes resume.

These trends and changes are taking place in an environment where library budgets are being stretched to support a widening array of services and resources. Despite this, the priority going forward—at least from one respondent—is "continue newly-developed remote opportunities."

Budgets, Funding, and Priorities

Expected Budgetary Changes

While there are differences between regions and library size, almost a quarter (23.7%) of academic libraries worldwide expect their budget to increase over the next five years (about 4% expect significant increases). More than 40% expect their budget to decrease (15% significantly), and 24.3% expect their budget to stay the same over the next five years.

How do you predict your total library budget will change over the next five years?	% of respondents
Reduce significantly	15.1%
Reduce slightly	27.2%
Stay the same	24.3%
Increase slightly	19.8%
Increase significantly	3.9%
Don't know	9.7%

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Asked how budgets for specific library resources are expected to change over the next twelve months, 53.7% of academic libraries expect their budgets for ebooks to increase (either slightly or significantly), followed by ejournals (47.1%) and tools for distance learning (46.5%). Topping the list of items for which academic libraries expect to see reduced budgets are equipment, furniture, and supplies (29.5%), textbooks (25.8%), special collections, and facilities (both selected by 25.5%)—essentially, resources that support physical library access.

Funding Eligibility

During the pandemic years of 2020 and early 2021, various governments instituted funding mechanisms to keep businesses, individuals and organizations such as schools and libraries afloat. Just under a quarter (22.9%) of academic libraries said they would be eligible for upcoming special funding for technology, 26.5% said "maybe," and 23.8% said no. Similarly, 17.0% of academic libraries said they would be eligible for upcoming special funding for content, about 55% of respondents are unaware if any additional government funding will be available for content.

Funding Strategies

If an academic library believed that a certain library initiative could bring additional value to *teaching and learning*, the chief pathway toward funding it would be making a justification for increased institutional support (cited by 61.8% of respondents), followed closely by shifting the current library budget (60.0%). Grant funding was cited by 38.8%. On the other hand, if an academic library believed that a certain library initiative could bring additional value to *research*, the chief pathway toward funding that initiative would also be making a justification for increased institutional support (cited by 58.6% of respondents, however), followed closely by shifting the current library budget (52.9%), and grant funding rose to 44.8%.

If you believed that a particular library initiative could bring additional value, how would the initiative get funded?	*For teaching and learning (% of respondents)*	*For research (% of respondents)*
Make a justification for increased institutional support	61.8%	58.6%
Shift existing library budget	60.0%	52.9%
Grant funding	38.8%	44.8%
Other	4.7%	5.1%

Budget Windfall Priorities

If library budgets were "magically" increased by 25 percent, what would they use the windfall to fund? At the top of the list for nearly two-thirds (64.7%) of academic libraries is "more electronic resources." This is far and away their biggest budget priority, especially in the COVID age of remote library access. Twenty percentage points below that at 43.7% is "more staff." The third priority is "digitization initiatives" at 41.8%.

If your library budget magically received an additional 25% to further the institutional mission, what might you invest in?	*% of respondents*
More electronic resources	64.7%
More staff	43.7%
Digitization initiatives	41.8%
Diversity, equity, and inclusion (DEI) initiatives	36.9%
Building/Facility improvements	35.7%
OER initiatives	31.5%
Pay increases	31.1%
More equipment, furniture, and supplies	29.7%
New or upgraded research data management tools	26.3%
Course materials	23.4%
New or upgraded library management system	21.4%
New or upgraded research sharing software	19.9%
More physical content	16.9%
Other	3.2%

Institution and Library Missions

Among a select group of factors, student engagement (76.0%) and student retention (72.2%) rank as the two most important contributing to an institution's mission.

How important are each of the following to your institution's mission? (HIGH IMPORTANCE)	*% of respondents*
Student Engagement	76.0%
Student Retention	72.2%
Research Excellence	59.5%
Affordable Learning	54.0%

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The top three most important factors for the *library's* mission are to provide an excellent patron experience (76.4%), teach students research and information skills (72.8%), and support the institutional mission (70.6%).

How important are each of the following to your library's mission? HIGH IMPORTANCE	% of respondents
Provide an excellent patron experience	76.4%
Teach students research and information skills	72.8%
Support institutional mission	70.6%
Prove library value to institutional leadership	64.0%
Provide course materials and support faculty	62.6%
Connect the library to the academic ecosystem	61.6%
Support research	61.5%
Support distance teaching and learning	54.6%
Provide individual and collaborative workspaces	52.8%
Collection development and preservation	46.6%
Preservation of rare materials	31.6%
Support library linked data	31.6%
Converting print to digital/scanning	28.0%

Library Challenges

The number one challenge for academic libraries is acquisitions budget limitations—a perennial challenge for libraries, although it is interesting that even though it is number one on this list, it was selected by fewer than two-thirds of libraries. The number two challenge is staff shortages, selected by 53.9%. Number three is communication and collaboration with faculty (46.7%).

Which of the following are significant challenges for your library?	% of respondents
Acquisitions budget limitations	61.1%
Staff shortages	53.9%
Communication and collaboration with faculty	46.7%
Funding cuts	41.1%
Staff training	33.4%
Communication with administration	32.4%
Lack of physical space	29.6%
Other departments want to use library space for specific purposes	29.6%
Supporting remote students	28.8%
Supporting diversity, equity, inclusion initiatives	28.4%
Cataloging and metadata management	26.6%
Supporting affordable learning	26.5%
Challenges with discovering multiple resource formats	24.7%
Inadequate IT systems	23.1%
Discovery of resources	22.5%
Controlled digital lending	21.8%
Facilities management	21.7%
Collaborating with other libraries	20.5%
Inadequate insight to resource usage	18.6%
Supporting international students	18.5%
Equipment management	16.6%
Consortia collaboration	14.6%
Linking to resources	14.6%
Other	3.8%
None of the above	0.8%

Remote Students

Although academic institutions have served remote or distance learning students for at least the past decade, the year of the COVID pandemic turned even in-person students into remote learners as campuses were closed or only open on a limited basis. While academic institutions and their libraries are no strangers to remote access of their facilities, the issue now becomes one of volume. Can institutions and libraries support such an increased number of students accessing remotely? What changes to library services will be needed to support this extra volume, and how likely is the library to implement what changes are necessary?

Six out of ten (60.3%) libraries say they are likely to implement any changes needed to support more remote students, 27.2% of them "very" likely. Almost one-third (31.5%) are unlikely, and only 8.6% of those are "very unlikely."

As for what those specific changes are, the most common write-in responses were related to:

- Increased access to electronic resources

- Bandwidth for remote access
- Acquisition of more electronic resources
- Chat service hours/staff expanded
- Continuing to provide online/Zoom events
- Creating video to replace in-person library instruction
- Fewer physical books, more electronic books
- OERs

Important Technology Purchase Criteria

Libraries purchase a lot of technology and have been doing so long before COVID. As experienced technology purchasers, the top three most important aspects of technology purchasing are product support (63.9%), interoperability and integrations (54.6%), and simple, easy administration (54.1%). In essence, they are concerned with how well the vendor supports the product, whether it integrates with other library systems and software, and whether it is easy to administer.

How important are the following when your library purchases technology systems and services? *HIGH IMPORTANCE*	*% of respondents*
Product support	63.9%
Interoperability and integrations	54.6%
Simple, easy administration	54.1%
Product training	50.2%
Documentation	45.5%
Customizable user experience	43.7%
Cloud-based	42.1%
Developer support	40.0%
Experience with provider	39.2%
Full featured, best of breed	39.2%
Lowest priced	37.2%
Open-source	29.8%

Cataloging

One key resource for library users is basic cataloging—after all, other library resources are not helpful if they cannot be easily found. As more digital materials are being acquired and added to library collections, they will need to be cataloged effectively. We asked if libraries expect to reduce cataloging budgets in the next 12 months, and 41.1% think it likely (12.4% very likely and 28.7% somewhat likely) that the library will reduce cataloging budgets, while 42.7% think it unlikely (14.5% very unlikely and 28.3% somewhat unlikely).

Library linked data (LLD) standards are being developed to ideally reduce redundant cataloging efforts and increase library resource visibility. Are academic libraries interested in linked data cataloging? One-third (33.6%) are interested in linked data cataloging, while a further 22.2% say they might be. Only 13.1% are uninterested, but another third (31.1%) don't know, likely due to unfamiliarity with the technology.

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Following up on this question, we asked if the library is actively working on plans to shift to linked data cataloging. Twenty-two percent are already doing some or most cataloging in linked data. Another 8.0 percent say they will start soon, while nearly a quarter (24.7%) have plans to shift to linked data, but not in the next 18 months. The remainder (45.8%) either have no plans to start or don't know.

Is your library actively working on plans to shift to linked data for cataloging?	% of respondents interested in linked data
NET YES	54.2%
Yes, but not in the next 18 months	24.7%
Yes, beginning soon	8.0%
Yes, we are already doing most cataloging in linked data	9.1%
Yes, we are already doing some cataloging in linked data	12.4%
No	21.4%
Don't know	24.4%

As for why libraries have no plans to move to linked data cataloging (but are interested in it), 41.5% need better tools and more knowledge, and 36.1% cite limited capacity. Eleven percent say there is not enough value to justify the effort.

What is the main reason you have not planned or moved to linked data cataloging?	% of respondents not interested in linked data
Need better tools and more knowledge	41.4%
Limited capacity	36.1%
There's not enough value	10.7%
Don't know	5.3%
Other	6.2%

Affordable Learning

In general, affordable learning comprises a series of initiatives that aim to reduce costs for students, particularly those associated with textbooks and other supplies. Affordable learning initiatives can involve Open Educational Resources (OER), but also include using library-licensed resources such as physical or electronic books, journals, textbooks, and other materials in lieu of having students purchase these items themselves.

In general, it is the library (35.0% of respondents) or the provost office (30.1%) that is leading affordable learning initiatives in institutions of higher learning. Less often it is the student affairs office (22.4%) or the faculty (20.1%). The good news is that at least it's someone; only 9.8% said their institution has no affordable learning initiatives.

Who is leading the affordable learning initiatives at your institution?	% of respondents
Library	35.0%
Provost office	30.1%
Students' office	22.4%
Faculty	20.1%
CIO office	15.5%
Other	7.6%
We have no affordable learning initiatives	9.8%
Don't know	17.5%

More than one-third (36.5%) of academic libraries say they are very involved in their institutions' affordable learning initiatives, while nearly one-half (48.5%) are at least somewhat involved. Nearly eleven percent of academic libraries are not involved at all.

Six out of ten respondents (59.4%) agree with the statement "Learning affordability is more important than it was at this time last year," with 29.5% strongly agreeing. Only 12.4% disagree and then only 4.9% strongly. Nearly one-fourth (23.9%) are neutral.

Open Educational Resources

More than one-half (55.7%) make OER content available via the library, while 40.6% support the development of OER content at their institution, and 31.9% support OER initiatives at the state or consortial level. One-fourth (24.5%) of libraries are not involved with OER content.

In which of the following ways is the library involved with Open Educational Resources (OER) content?	% of respondents
Make OER content available via the library	55.7%
Support the development of OER content at this institution	40.6%
Support OER initiatives at the state or consortial level	31.9%
Other	5.8%
Library is not involved with OER content	24.5%

Adaptation to Evolving Needs

If there is one thing that libraries learned over the past decade, it's that institution and user needs invariably change. This was perhaps demonstrated most vividly during COVID, but academic institutions were changing long before the pandemic, with increased distance learning and remote access, not to mention constantly evolving technology. Do academic libraries expect that their approach to supporting course materials will change as needs evolve? More than one-half (54.8%) expect there to be some change; 22.2% significant, 32.6% minor. One-fourth (25.3%) expect no change.

Do you expect the library's approach to supporting course materials will change due to evolving needs?	% of respondents
NET YES	54.8%
Yes, significant change	22.2%
Yes, minor change	32.6%
No change	25.3%
Don't know	19.9%

As for what those specific changes are likely to be in the short-term (next 18 months), the top write-in responses revolved around "more electronic and fewer print resources," "more adoption/providing of OER," "more etextbooks," and "greater emphasis on remote learning/access." In the long-term, respondents cited many of the same things—OER/OA will become more prevalent, print collections will virtually disappear as more, if not all, resources become available electronically, and the perennial budget cut concerns.

Resource Sharing

Resource sharing means making the collections of one library available to the users of another library. Practices like interlibrary loan have been around for decades, but modern library resource sharing can be applied to technical capabilities, staff skills and knowledge, discovery tools, collection management, and other library resources. However, resource sharing for course materials is a different matter.

Nearly one-half (47.5%) of academic libraries said they would consider resource sharing for course materials, while 29.8% said "maybe." Only 8.2% would not be interested. Perhaps libraries that are on the fence about resource sharing get what they need via their consortium (those that are part of one), or perhaps course materials are highly customized for individual faculty/classes and not seen as "portable."

One of the oldest forms of resource sharing is interlibrary loan (ILL). The top challenge for libraries related to interlibrary loan is the cost related to borrowing activities, cited by 32.1% of respondents. Another 31.7% cited turnaround time for borrowing request fulfillment by partner lenders, while 28.0% cited administrative effort to fulfill incoming ILL requests to borrow and 25.4% cited administrative effort to fulfill incoming ILL requests to lend. The data suggests that schools experiencing problems with ILL are facing those challenges on multiple levels. That said, 21.0% reported experiencing no challenges with ILL.

Which, if any, of the following interlibrary loan-related activities pose significant challenges for your library?	*% of respondents*
Costs related to borrowing activities	32.1%
Turnaround time for borrowing request fulfillment by partner lenders	31.7%
Administrative effort to fulfill incoming ILL requests to borrow	28.0%
Managing consortial-level resource sharing initiatives	27.4%
Administrative effort to fulfill incoming ILL requests to lend	25.4%
The imbalance of our ILL borrowing vs. our lending	21.3%
Other	7.9%
None of the above	21.0%

The top "tool" for processing interlibrary loans is basic consortial resource sharing, selected by 47.6% of academic libraries, followed by ILLiad (32.1%) and Ex Libris' RapidILL (22.8%).

What are your primary interlibrary loan tools?	*% of respondents*
Consortial resource sharing	47.6%
Illiad	32.1%
RapidILL	22.8%
RelaisIll	12.7%
Clio	11.7%
Reshare	11.7%
Rapido	9.7%
Tipasa	8.3%
Other	20.4%

"Other" was selected by twenty percent of respondents—top write-in responses were:

- OCLC WorldShare
- Docline
- Manual processes (email, telephone)

Research and the Library

How does an academic library support faculty research? The overwhelming response is "provide access to scholarly sources," selected by 81.3% of responses. This is distantly followed by "provide access to non-scholarly varied content sources" (55.7%), "provide citation management software" (47.7%), and "deposit publications or datasets to an institutional research repository" (42.8%).

In which of the following ways does your library support faculty research?	*% of respondents*
Provide access to scholarly sources	81.3%
Provide access to non-scholarly varied content sources	55.7%
Provide citation management software	47.7%
Deposit publications or datasets to an institutional research repository	42.8%
Find relevant journals for publication	34.2%
Support faculty profiles	30.5%
Provide metadata support	29.1%
Manage article processing charges	26.1%
Monitor the impact of faculty research	21.5%
Ensure compliance with Open Access policies	20.0%
Prepare data management plans	19.3%
Access to research funding databases	19.3%
Monitor the impact of research conducted in the library	13.8%
Submit research for publication	10.7%
Other	4.3%
None of the above	2.0%

Conclusions and Recommendations

What is the state of academic libraries as we emerge from the pandemic? As we have seen in many other industries and parts of our culture, the pandemic exacerbated and accelerated trends that have been impacting libraries throughout the past decade.

Budget is an ongoing concern. While some institutions are experiencing increased enrollment, such as Historically Black Colleges and Universities[1] and highly ranked public universities[2] in the United States, universities in the United Kingdom[3], and institutions in the Netherlands[4], and

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[1] See https://www.blackenterprise.com/hbcus-experience-record-surge-in-enrollment-for-2021-22-academic-year/.

[2] See https://www.forbes.com/sites/michaeltnietzel/2021/08/24/initial-estimates-show-fall-enrollments-up-at-several-public-universities/?sh=3c61e9ad4cb3.

[3] See https://www.universityworldnews.com/post.php?story=20210914110815378.

[4] See https://www.universityworldnews.com/post.php?story=20210911153341882.

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others[5] are experiencing enrollment declines. Less money coming into the university means budgets everywhere will be cut. Whether these enrollment declines are temporary and will bounce back post-COVID remains to be seen. For the time being, the impact on budgets will drive libraries to rely on time-tested strategies, like shifting funds from less important or popular resources to those that are more important. At present, this means taking money from print and other physical resources and shifting it to electronic resources, whether that means buying more digital-only materials or digitizing print materials.

Cataloging can be a big expense for libraries, and respondents to this survey seem to be on the fence about whether they can look for cuts in cataloging budgets. A fair number of libraries have investigated and pursued potential catalog cost-reduction measures such as Library Linked Data, many more are still in the exploratory phase.

Indeed, as we saw in the telling "budget windfall" question, if libraries suddenly received a magical 25 percent increase in their budget, the top "goodies" it would be spent on were electronic resources, digitization, and additional staff. In the equally telling "top significant challenges" question, key issues for academic libraries are budget limitations, staff shortages, and ineffective communication with faculty—perennial challenges for academic libraries that have become more acute with the pandemic.

The primary reason for the increase in electronic resources is the expectation that the pandemic-induced surge in remote students will not be temporary. Just like "work from home" will largely persist even when offices completely reopen, so too will "educate from home." Many libraries and institutions anticipate a hybrid approach, with some in-person student attendance and some remote, sometimes by the same students. While academic libraries have long served remote users, the surge in new remote users is driving a need to catch up to the demand.

Affordable learning is another increasing trend, again exacerbated by the pandemic. Upwards of 90 percent of academic institutions have affordable learning initiatives, and most libraries are at least somewhat involved in those initiatives. Textbook cost-reduction measures such as Open Educational Resources (OER) and Open Access (OA) materials have been on the rise over the past couple of years, but interest appears to be hitting critical mass, with the majority of libraries anticipating that OER/OA will be a dominant trend in the next few years. Libraries have been active in supporting OER/OA as well as developing content and/or working with faculty to develop OER/OA content for their students.

The pandemic year has put strain on academic libraries—as it has on just about everyone. They continue to weather the changes and are arming themselves with technological and budgeting savvy to overcome imminent and, in many cases, persistent challenges.

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[5] See, for example, Michael T. Nietzel, "Latest Numbers Show Largest College Enrollment Decline In A Decade," *Forbes*, Jun 10, 2021, https://www.forbes.com/sites/michaeltnietzel/2021/06/10/updated-numbers-show-largest-college-enrollment-decline-in-a-decade/?sh=249dadfe1a70.

Introduction

Welcome to the *Library Journal* report on *The State of Academic Libraries*, which includes responses from a worldwide sample of 1,843 college and university libraries. The survey, which we conducted in the Spring of 2021, covers broad topics such as budget changes for library cataloging, collections and resources, technology purchase criteria, library challenges, affordable learning initiatives and resource sharing.

The past decade has seen a sea change in how students and faculty use libraries—e.g. remotely vs. in-person—while at the same time the formats in which library resources are available have been rapidly evolving. Then the pandemic year 2020 dramatically accelerated those changes.

These trends and changes are taking place in an environment where already austere library budgets are in fear of being cut, even as the library is called on to provide more services and resources. New technologies and initiatives—Open Source/Access materials, affordable learning, resource sharing, etc.—can help ameliorate these challenges. To what extent are libraries availing themselves of these new resources?

As we emerge from the pandemic (should we emerge from the pandemic), academic institutions and their libraries find themselves at a crossroads. This report aims to gauge which direction libraries are likely to go.

For the first time, *Library Journal* has conducted a truly international survey of academic institutions, and some of the data breakdowns by region show some interesting distinctions, opportunities, and priorities based on geography.

How the Data in this Report Are Organized

If you have read past *Library Journal* reports, you are familiar with how we typically present our data. The bulk of this report provides top-level survey results in chart form—in essence, the "all responses" results, or what all academic library professionals surveyed said about a specific question. This provides the prevailing attitude.

Each chart is followed by two corresponding tables that segment the survey responses by:

- Region—North America, Latin America, Asia, Europe, Australia/New Zealand (Oceania), and the Middle East/Africa.[6]
- Enrollment—Under 5,000 students, 5,000 to 9,999 students, 10,000 to 19,999 students, and more than 20,000 students.
- Degrees granted by the institution (North American institutions only)—Doctorate, Master's, Baccalaureate, an Associate's.[7]

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[6] The Middle East/Africa segment had fewer than 100 respondents, therefore the data is not statistically significant or projectable, but directional.

[7] The question accepted multiple answers so there is some overlap between and among segments.

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We have called out in commentary where some results in these segments caught our attention, but readers who are looking for more granularity will find much of value in these tables.

Several open-ended questions about specific topics were asked, and the comments provide a good lens through which to view the quantitative data. We had nearly 2,000 responses to this survey, so we were not able to include every response. We have called out common themes among the write-in responses. Other "standalone" comments are sprinkled throughout the report where appropriate.

Budgets, Funding, and Priorities

In this section, we look at academic library budgets, which direction they are moving in, spending priorities, and other challenges faced by academic libraries globally.

Expected Budgetary Changes

Overall Expectations

Less than one-fourth (23.7%) of academic libraries worldwide expect their budget to increase over the next five years, and of those only 3.9% expect it to increase significantly. Just over four out of ten (42.3%) expect their budget to decrease, 15.1% expect it to decrease significantly. Another one-fourth (24.3%) predict their budget will stay the same over the next five years—which, accounting for inflation, means that it will decrease.

Figure 1. How do you predict your total library budget will change over the next five years? —All academic libraries
NET INCREASE 23.7%
NET REDUCTION 42.3%
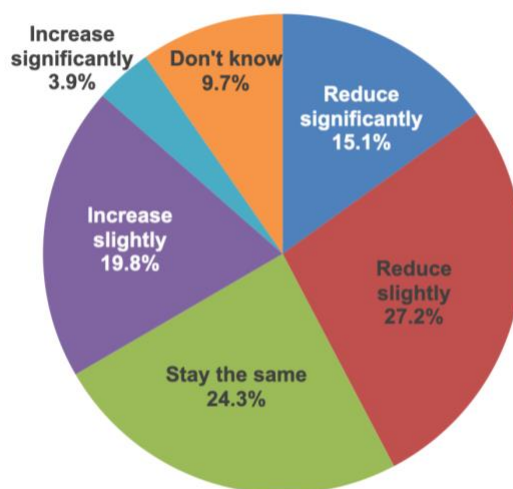
n=1,839

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As per the tables below, academic libraries in the Middle East and Africa are the most likely to expect a budget increase over the next five years (33.3% expect it to increase, 7.6% significantly), while libraries in Australia and New Zealand are the most likely (47.6%) to predict a reduction.

Small to mid-sized academic libraries (serving institutions with 5,000 to 9,999 enrollment) are the most likely (32.7%) to expect a budgetary increase, while mid-sized to large academic libraries (serving institutions with 10,000 to 19,999 enrollment) are the most likely (46.6%) to expect a budgetary reduction.

Table 1. How do you predict your total library budget will change over the next five years? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Reduce significantly	12.0%	25.8%	17.9%	7.5%	26.2%	10.6%
Reduce slightly	30.6%	15.9%	29.1%	27.0%	21.4%	24.2%
Stay the same	24.5%	19.8%	25.7%	28.9%	22.3%	28.8%
Increase slightly	18.6%	23.0%	20.1%	23.9%	13.6%	25.8%
Increase significantly	2.7%	5.7%	5.0%	5.7%	3.9%	7.6%
Don't know	11.5%	9.9%	2.2%	6.9%	12.6%	3.0%
NET INCREASE	21.3%	28.6%	25.1%	29.6%	17.5%	33.3%
NET REDUCTION	42.6%	41.7%	46.9%	34.6%	47.6%	34.8%

Table 2. How do you predict your total library budget will change over the next five years? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Reduce significantly	16.1%	13.9%	16.1%	13.2%	12.3%	11.6%	8.6%	14.8%
Reduce slightly	27.0%	24.3%	30.5%	27.7%	32.3%	33.3%	31.1%	30.8%
Stay the same	27.8%	23.4%	21.5%	22.7%	22.8%	23.1%	26.7%	25.3%
Increase slightly	16.9%	24.8%	20.7%	19.5%	18.8%	14.5%	18.1%	19.2%
Increase significantly	2.8%	7.9%	2.7%	3.2%	0.9%	6.3%	3.2%	2.2%
Don't know	9.5%	5.7%	8.4%	13.8%	12.9%	11.2%	12.4%	7.7%
NET INCREASE	19.7%	32.7%	23.4%	22.7%	19.8%	20.8%	21.3%	21.4%
NET REDUCTION	43.1%	38.1%	46.6%	40.8%	44.6%	44.9%	39.7%	45.6%

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Budgets for Specific Resources

In terms of how budgets for specific library resources are expected to change in the next year, ebooks are likely to be the primary beneficiary; more than one-half (53.7%) of academic libraries expect their budgets for ebooks to increase (either slightly or significantly). This is followed by ejournals (47.1%) and "tools for distance learning" (46.5%)—we'll have more to say about tools for distance learning later in this section. Indeed, the top items are predominantly resources that facilitate distance learning and remote access of the library.

Figure 2. For each of the following, how do you imagine the library's budget will change next year? NET INCREASE (SLIGHTLY/SIGNIFICANTLY) —All academic libraries

E-resources: Books	53.7%
E-resources: Journals	47.1%
Tools for distance learning	46.5%
E-resources: Other	43.5%
Resource sharing/Interlibrary loan	34.1%
Scanning physical materials	33.9%
Resource discovery tools	31.5%
Equipment, furniture, and supplies	28.3%
Facilities	28.2%
Course materials	27.8%
Library management system	27.0%
Textbooks	26.4%
Special collections	23.4%
Resource list management	22.7%
Cataloging services	19.7%
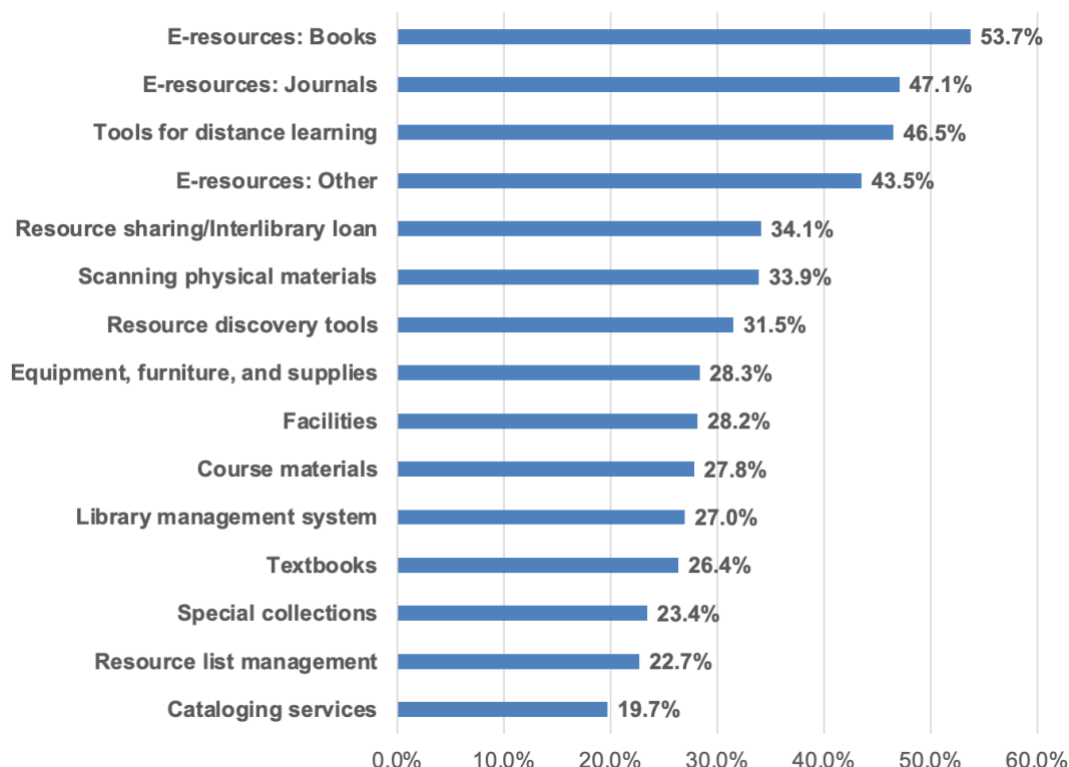
n=1,839

For academic libraries in Latin America (59.0%), "tools for distance learning" is most likely to see a budgetary increase. Academic libraries in the Middle East/Africa selected "resource list management" (57.9%) most often to receive a budgetary increase next year.

Looking at differences by enrollment size, small to mid-sized academic libraries (serving institutions with 5,000 to 9,999 enrollment) seem to have a higher likelihood of increased budgets for most items appraised.

Table 3. For each of the following, how do you imagine the library's budget will change next year? NET INCREASE (SLIGHTLY/SIGNIFICANTLY) —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
E-resources: Books	55.8%	49.8%	54.0%	51.4%	49.4%	51.8%
E-resources: Journals	50.1%	43.6%	42.9%	43.6%	43.0%	43.6%
Tools for distance learning	43.4%	59.0%	42.5%	48.9%	44.7%	53.6%
E-resources: Other	43.7%	44.4%	40.1%	50.0%	30.6%	55.4%
Resource sharing/Interlibrary loan	35.7%	31.6%	26.3%	34.3%	30.2%	47.4%
Scanning physical materials	30.5%	44.7%	28.4%	42.4%	29.1%	44.6%
Resource discovery tools	29.5%	33.2%	30.4%	42.6%	25.6%	40.4%
Equipment, furniture, and supplies	26.8%	30.8%	30.0%	34.3%	18.4%	37.5%
Facilities	24.5%	31.7%	33.8%	32.4%	21.8%	50.0%
Course materials	25.4%	34.4%	28.1%	32.4%	22.1%	36.8%
Library management system	29.1%	25.2%	23.5%	22.0%	23.0%	31.0%
Textbooks	25.1%	28.1%	21.7%	33.6%	23.0%	42.1%
Special collections	20.8%	24.9%	27.0%	25.9%	20.7%	44.6%
Resource list management	15.1%	33.5%	21.7%	40.4%	20.5%	57.9%
Cataloging services	14.1%	27.2%	18.6%	31.4%	18.4%	50.9%

Table 4. For each of the following, how do you imagine the library's budget will change next year? NET INCREASE (SLIGHTLY/SIGNIFICANTLY) —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
E-resources: Books	50.9%	58.0%	53.5%	55.0%	54.3%	52.9%	53.9%	56.6%
E-resources: Journals	46.4%	49.2%	46.0%	47.4%	48.1%	47.1%	50.7%	48.4%
Tools for distance learning	46.1%	47.0%	46.9%	47.0%	43.0%	41.7%	42.5%	46.5%
E-resources: Other	41.6%	49.1%	41.1%	43.5%	40.9%	42.3%	46.4%	43.6%
Resource sharing/Interlibrary loan	34.0%	32.8%	33.1%	36.5%	37.7%	36.1%	34.2%	27.7%
Scanning physical materials	31.5%	35.7%	32.7%	37.6%	32.0%	27.7%	28.4%	21.4%
Resource discovery tools	30.7%	36.7%	28.4%	31.0%	24.3%	29.1%	33.2%	29.4%
Equipment, furniture, and supplies	27.7%	36.7%	25.6%	24.5%	22.6%	23.4%	28.0%	29.7%
Facilities	29.1%	33.9%	24.6%	25.1%	21.7%	21.5%	25.9%	27.2%
Course materials	27.7%	32.6%	21.6%	29.1%	21.3%	21.7%	24.9%	28.1%
Library management system	27.0%	33.8%	25.4%	22.1%	25.4%	27.0%	31.5%	29.8%
Textbooks	27.9%	31.8%	21.9%	22.7%	19.2%	22.0%	28.3%	32.9%
Special collections	23.4%	30.2%	18.2%	22.3%	19.0%	16.3%	27.0%	17.9%
Resource list management	23.7%	30.9%	16.4%	19.2%	12.1%	18.5%	20.7%	13.8%
Cataloging services	23.4%	23.5%	17.8%	12.1%	11.7%	13.7%	16.0%	16.1%

Topping the list of items for which academic libraries expect to see reduced budgets are essentially resources that support physical library access: equipment, furniture, and supplies (29.5%), textbooks (25.8%), special collections, and facilities (both selected by 25.5%).

Figure 3. For each of the following, how do you imagine the library's budget will change next year? NET DECREASE (SLIGHTLY/SIGNIFICANTLY) —All academic libraries

Category	Percentage
Equipment, furniture, and supplies	29.5%
Textbooks	25.8%
Special collections	25.5%
Facilities	25.5%
Cataloging services	24.9%
E-resources: Journals	23.7%
E-resources: Other	20.6%
Course materials	19.6%
Scanning physical materials	19.3%
E-resources: Books	19.2%
Library management system	19.0%
Resource discovery tools	17.3%
Resource list management	16.0%
Resource sharing/Interlibrary loan	15.1%
Tools for distance learning	10.4%

n=1,839

Academic libraries in Oceania are the most likely to expect a decrease in equipment, furniture, and supplies funding (42.5%).

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Table 5. For each of the following, how do you imagine the library's budget will change next year? NET DECREASE (SLIGHTLY/SIGNIFICANTLY) —Academic libraries by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Equipment, furniture, and supplies	25.7%	34.8%	35.0%	30.7%	42.5%	26.8%
Textbooks	21.8%	39.0%	24.2%	26.4%	29.9%	28.1%
Special collections	19.8%	39.6%	29.6%	25.9%	32.2%	28.6%
Facilities	22.7%	28.6%	31.3%	25.9%	34.5%	23.2%
Cataloging services	24.0%	27.2%	26.1%	23.4%	26.4%	26.3%
E-resources: Journals	21.2%	32.2%	18.6%	26.4%	27.9%	29.1%
E-resources: Other	17.4%	26.2%	21.0%	22.9%	31.8%	19.6%
Course materials	16.3%	26.8%	20.0%	22.3%	20.9%	26.3%
Scanning physical materials	16.7%	21.2%	27.2%	20.1%	24.4%	19.6%
E-resources: Books	16.7%	26.6%	16.1%	20.0%	26.4%	17.9%
Library management system	12.3%	29.6%	19.8%	31.2%	19.5%	43.1%
Resource discovery tools	13.1%	30.1%	16.8%	21.3%	14.0%	24.6%
Resource list management	12.2%	24.1%	23.6%	16.9%	14.8%	15.8%
Resource sharing/Interlibrary loan	11.5%	19.3%	21.9%	17.1%	23.3%	15.8%
Tools for distance learning	8.4%	12.0%	12.5%	14.4%	9.4%	19.6%

Table 6. For each of the following, how do you imagine the library's budget will change next year? NET DECREASE (SLIGHTLY/SIGNIFICANTLY) —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	**5K–9.9K**	**10K– 19.9K**	**20K+**	**Doctor- ate**	**Master's**	**Bacca- laureate**	**Asso- ciates**
Equipment, furniture, and supplies	30.4%	26.4%	29.6%	30.3%	24.5%	32.1%	24.3%	27.2%
Textbooks	25.9%	21.3%	28.6%	27.3%	21.6%	27.5%	23.8%	22.8%
Special collections	29.3%	20.6%	24.2%	23.7%	18.3%	26.7%	19.5%	23.1%
Facilities	25.5%	23.3%	27.6%	25.4%	21.5%	29.5%	24.1%	21.5%
Cataloging services	24.1%	23.2%	23.3%	29.1%	23.5%	28.2%	26.0%	22.4%
E-resources: Journals	24.9%	19.2%	26.8%	23.0%	23.6%	19.6%	20.5%	20.8%
E-resources: Other	19.8%	16.8%	24.0%	21.9%	19.1%	17.8%	16.1%	15.4%
Course materials	20.1%	18.4%	20.9%	18.4%	15.3%	22.0%	21.2%	20.0%
Scanning physical materials	19.8%	17.2%	20.9%	19.0%	15.9%	19.8%	18.3%	17.6%
E-resources: Books	19.1%	13.9%	23.1%	20.1%	19.2%	17.6%	16.5%	14.5%
Library management system	22.1%	18.6%	15.7%	17.2%	12.2%	14.1%	15.2%	16.8%
Resource discovery tools	17.4%	17.7%	17.2%	17.1%	13.3%	13.4%	15.7%	13.1%
Resource list management	19.0%	12.4%	16.1%	14.6%	10.9%	16.1%	13.9%	10.1%
Resource sharing/Interlibrary loan	17.5%	12.6%	14.0%	14.1%	9.9%	15.3%	14.1%	11.9%
Tools for distance learning	11.5%	9.8%	11.9%	7.5%	6.7%	11.1%	12.4%	10.8%

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Library Management System Supplementary Purchases

Only about one-fifth (21.2%) of academic libraries purchased software or services beyond what their library management system (LMS) supports, while more than half (55.3%) did not. (One-fourth—23.5%—selected "don't know.")

Figure 4. During the past year, did your library acquire any software/services that are not part of the supported functionality of your existing library management system? —All academic libraries
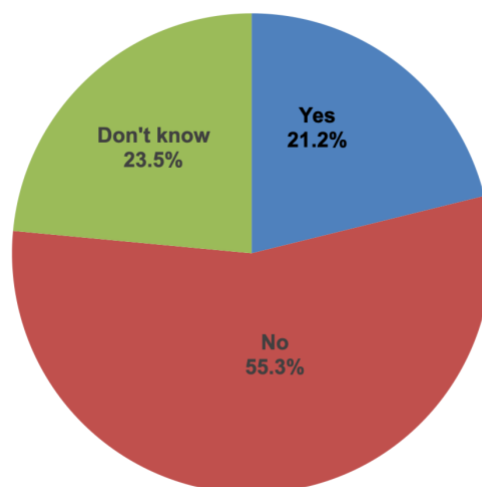
n=1,527

Academic libraries in Europe were the most likely (33.3%) to purchase software or services beyond that supported by their LMS, followed by those in Oceania (27.0%). Academic libraries in the Middle East/Africa (15.8%) and North America (18.2%) were the least likely.

Small to mid-size academic libraries (those serving institutions with 5,000 to 9,999 enrollment) were the most likely (22.5%) to purchase extra-LMS software/services, as were those libraries serving North American institutions that grant doctorate degrees (19.7%).

Table 7. During the past year, did your library acquire any software/services that are not part of the supported functionality of your existing library management system? —Academic libraries by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Yes	18.2%	23.3%	20.5%	33.3%	27.0%	15.8%
No	55.1%	56.8%	70.2%	42.0%	44.9%	61.4%
Don't know	26.7%	19.8%	9.3%	24.6%	28.1%	22.8%

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Table 8. During the past year, did your library acquire any software/services that are not part of the supported functionality of your existing library management system? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Yes	20.5%	22.5%	21.5%	21.1%	19.7%	14.7%	14.6%	15.2%
No	60.9%	57.3%	50.7%	48.2%	48.1%	59.9%	63.8%	66.5%
Don't know	18.6%	20.3%	27.9%	30.7%	32.3%	25.4%	21.6%	18.4%

What specifically were they purchasing? Some common write-in responses include:

- Aeon
- Camtasia
- Digital Commons
- ExLibris
- Leganto
- LibCal
- RapidILL
- Springshare
- Textbook scanning hardware and software
- Various Zoom iterations

Funding Eligibility

During the pandemic year of 2020 and early 2021, various governments made available a variety of funding mechanisms to keep businesses, individuals, and organizations such as schools and libraries afloat. In the US, the CARES Act was passed in early 2020, followed by the American Rescue Plan Act in early 2021. Although our survey was in the field after both of these relief efforts (as well as others in other countries), and there are as of this writing no plans for further relief efforts[8], we asked if the library would be eligible for any extra funding should it become available. We asked this in two parts, specifying

- Funding for technology
- Funding for content

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[8] Aside from various infrastructure-related bills currently before Congress in the United States.

Funding for Technology

Just under one-fourth (22.9%) of academic libraries said they would be eligible for any upcoming special funding for technology, 26.5% said "maybe," and 23.8% said "no." An additional 26.8% said they "don't know"—combined with "maybe" means that more than one-half (53.3%) of respondents are unaware if any additional government funding is in the cards, even if a bill appears.

Figure 5. Do you anticipate that the library will be eligible for upcoming special funding, such as CARES funding, for TECHNOLOGY? —All academic libraries
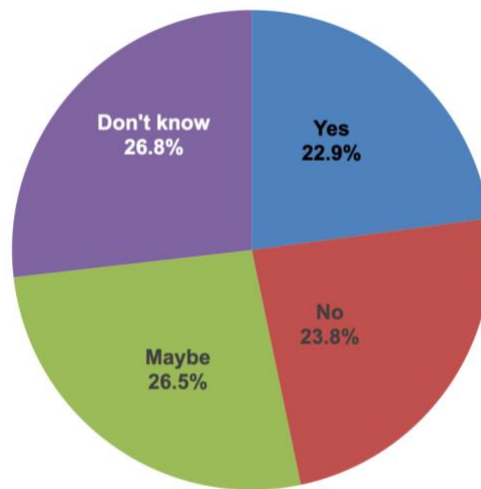
n=1,503

Funding for Content

Extra funding for content is even less certain than funding for technology. Seventeen percent of academic libraries said they would be eligible for any upcoming special funding for content, while 25.1% said "maybe," 28.0% said "no", and 29.9% said they "don't know"—so 55% of respondents are unaware if any additional government funding will be available for content.

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Figure 6. Do you anticipate that the library will be eligible for upcoming special funding, such as CARES funding, for CONTENT? —All academic libraries
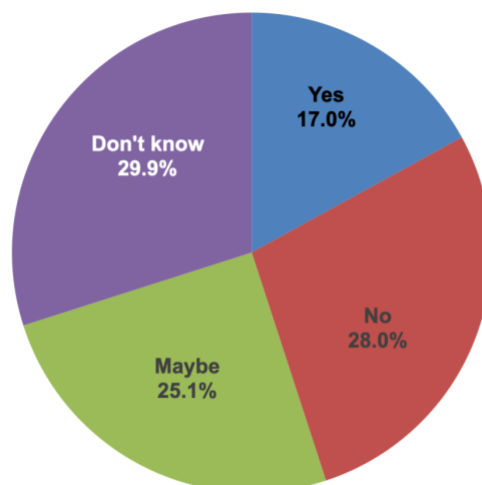
n=1,474

Libraries in the Middle East/Africa (44.4%) and Europe (34.3%) were the most likely to consider themselves eligible for additional special funding for technology. Middle East/Africa (26.4%) and Asia (23.1%) were the most likely to consider themselves eligible for additional special funding for content.

Small to mid-size academic libraries (serving institutions with 5,000 to 9,999 enrollment) were the most likely to deem themselves eligible for special funding for both technology (31.8%) and content (28.9%). North American institutions that grant associates degrees were far more likely to anticipate being eligible for special funding than other institutions that are less likely to be publicly funded.

Table 9. Do you anticipate that the library will be eligible for upcoming special funding, such as CARES funding? —Academic libraries by region

|	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
For Technology						
Yes	20.1%	23.1%	25.0%	34.3%	11.4%	44.4%
No	22.8%	20.4%	28.8%	21.9%	44.3%	13.0%
Maybe	27.0%	28.1%	28.8%	24.1%	12.5%	35.2%
Don't know	30.1%	28.5%	17.5%	19.7%	31.8%	7.4%
For Content						
Yes	14.9%	19.1%	23.1%	18.2%	10.6%	26.4%
No	27.1%	23.0%	25.0%	34.3%	45.9%	26.4%
Maybe	24.5%	27.3%	34.6%	22.6%	5.9%	37.7%
Don't know	33.6%	30.6%	17.3%	24.8%	37.6%	9.4%

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Table 10. Do you anticipate that the library will be eligible for upcoming special funding, such as CARES funding? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
For Technology								
Yes	20.0%	31.8%	18.2%	23.7%	14.9%	18.0%	20.8%	36.8%
No	26.3%	21.9%	22.3%	23.1%	23.8%	22.8%	21.9%	12.3%
Maybe	29.9%	25.7%	27.8%	20.2%	23.0%	24.8%	29.1%	36.8%
Don't know	23.8%	20.6%	31.6%	32.9%	38.4%	34.4%	28.3%	14.2%
For Content								
Yes	12.5%	28.9%	13.2%	17.0%	9.3%	13.8%	17.8%	23.5%
No	32.2%	24.7%	25.8%	26.4%	26.8%	24.8%	24.2%	22.9%
Maybe	27.8%	27.0%	23.7%	20.0%	20.8%	25.6%	26.5%	31.4%
Don't know	27.6%	19.4%	37.3%	36.7%	43.1%	35.8%	31.4%	22.2%

Funding Strategies

What are the avenues available for funding new initiatives—and which is given greater priority: teaching and learning or research?

Funding for Teaching/Learning and Research Initiatives

If an academic library believed that a certain library initiative could bring additional value to *teaching and learning*, the chief pathway toward funding that initiative would be making a justification for increased institutional support (cited by 61.8% of respondents), followed closely by shifting the current library budget (60.0%). Grant funding was cited by 38.8%.

Similarly, if an academic library believed that a certain library initiative could bring additional value to *research*, the chief pathway toward funding that initiative would also be making a justification for increased institutional support (cited by 58.6% of respondents), followed by shifting the current library budget (52.9%). The likelihood of relying on grant funding rose to 44.8%, so it seems that it would be more likely for institutions to fund new *research* initiatives with grants compared to teaching and learning initiatives.

Figure 7. If you believed that a particular library initiative could bring additional value to <u>teaching and learning</u>, how would the initiative get funded? Check all that apply. —All academic libraries
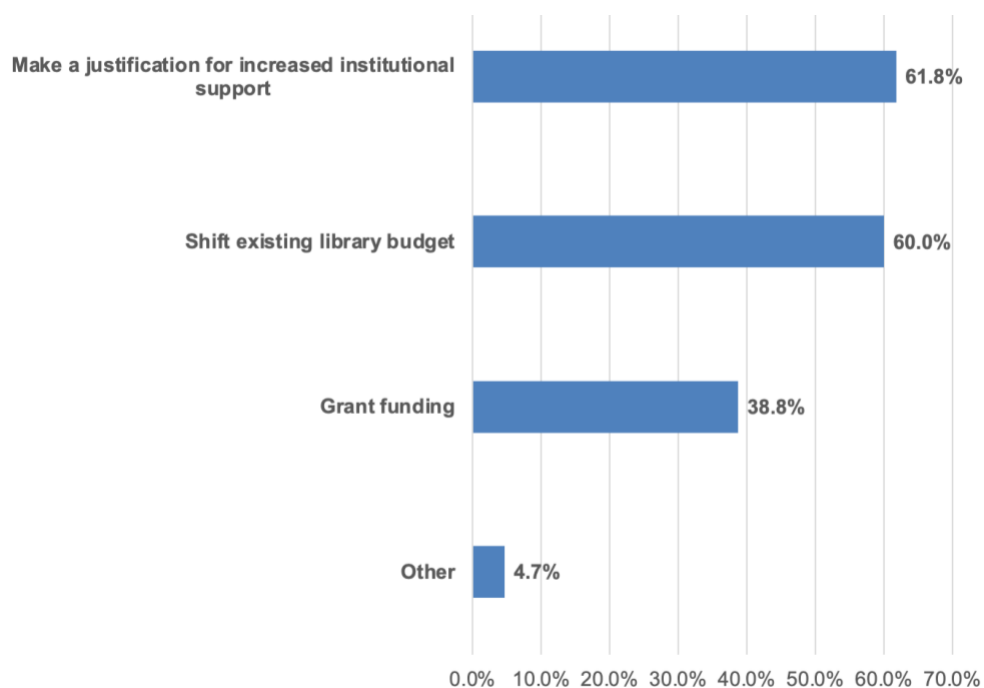
n=1,434

Figure 8. If you believed that a particular library initiative could bring additional value to <u>research</u>, how would the initiative get funded? Check all that apply. —All academic libraries
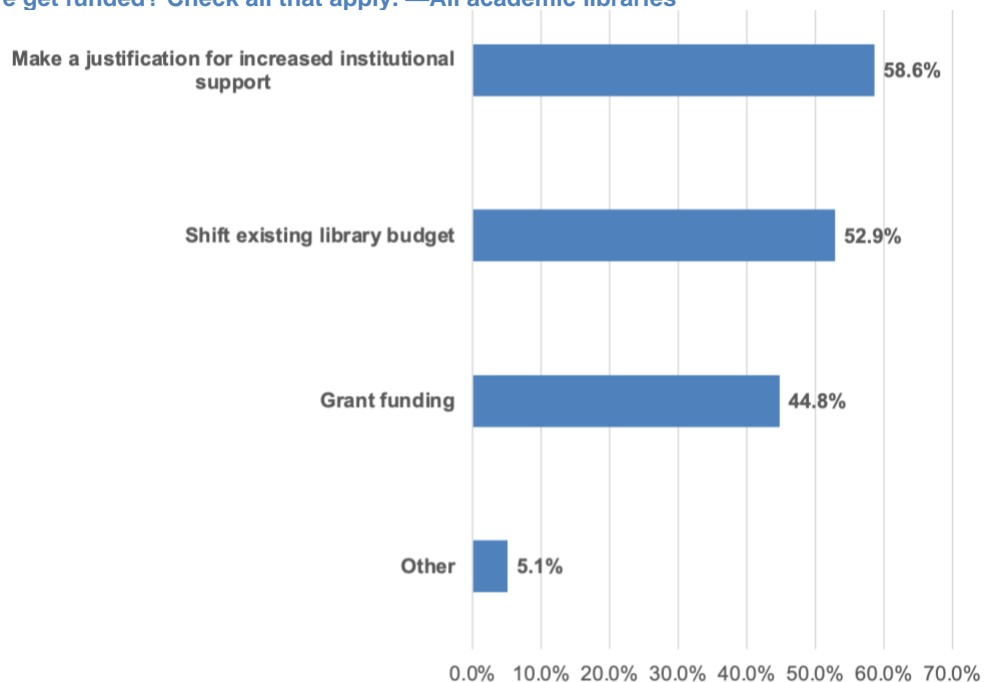
n=1,392

Grant funding, be it for teaching and learning or research initiatives is very much a North American thing, cited by 50.1% (teaching and learning) and 55.3% (research). Only Asia comes close with grant funding for teaching and learning (30.8%) and research (38.7%). For academic libraries in Oceania, making a justification for increased institutional support would be the way to go for both teaching and learning (76.6%) and research (64.5%). The tendency to fund new initiatives via grants increases with size of institution, rising to 44.8% (teaching and learning) and 54.9% (research) of academic libraries serving large institutions (20,000+ enrollment).

Table 11. If you believed that a particular library initiative could bring additional value to teaching and learning and research, how would the initiative get funded? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Teaching and Learning						
Make a justification for increased institutional support	63.6%	56.9%	73.1%	46.5%	76.6%	38.2%
Shift existing library budget	63.9%	59.8%	38.5%	64.3%	53.2%	63.6%
Grant funding	50.1%	22.5%	30.8%	24.8%	18.2%	20.0%
Other	5.6%	5.4%	4.5%	0.0%	5.2%	0.0%
Research						
Make a justification for increased institutional support	58.7%	63.4%	66.9%	46.9%	64.5%	41.8%
Shift existing library budget	52.8%	51.5%	40.3%	64.1%	52.6%	61.8%
Grant funding	55.3%	28.7%	38.7%	27.3%	31.6%	25.5%
Other	6.9%	4.0%	4.0%	0.0%	3.9%	0.0%

Table 12. If you believed that a particular library initiative could bring additional value to teaching and learning and research, how would the initiative get funded? Check all that apply.—Academic libraries by enrollment and degree granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	**5K–9.9K**	**10K– 19.9K**	**20K+**	**Doctor- ate**	**Master's**	**Bacca- laureate**	**Asso- ciates**
Teaching and Learning								
Make a justification for increased institutional support	60.6%	58.3%	63.6%	65.3%	66.7%	60.3%	64.1%	63.8%
Shift existing library budget	58.2%	61.9%	63.6%	58.7%	65.4%	64.5%	63.4%	65.8%
Grant funding	33.3%	40.4%	40.4%	44.8%	52.3%	49.6%	51.1%	53.0%
Other	4.6%	4.0%	3.3%	6.6%	6.2%	5.0%	5.7%	3.4%
Research								
Make a justification for increased institutional support	57.3%	56.1%	66.8%	55.8%	65.0%	59.1%	58.5%	47.3%
Shift existing library budget	52.2%	51.9%	51.9%	56.2%	57.6%	52.5%	46.9%	43.8%
Grant funding	38.0%	44.3%	46.9%	54.9%	56.8%	55.4%	58.1%	54.8%
Other	6.0%	3.8%	5.3%	4.2%	4.6%	6.2%	7.3%	8.2%

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Budget Windfall Priorities

Here is where we truly discover what academic libraries' priorities—and perhaps what their major challenges—are, so let's dwell on the responses to this question for a bit longer than we had for other questions.

If library budgets were "magically" increased by 25%, what would they use the windfall to fund? At the top of the list at nearly two-thirds (64.7%) of academic libraries is "more electronic resources." This is far and away their biggest budget priority, especially in the post-COVID age of remote library access. Twenty percentage points below that at 43.7% is "more staff." (This surpasses "pay increases" by a wide margin, which was selected by 31.1%.) The third priority is "digitization initiatives" at 41.8%. We got a sense of this a few questions earlier when we saw that scanning hardware and software was a top purchase. Anything that isn't in electronic form and thus remotely available needs to be.

The number four priority is "diversity, equity, and inclusion" initiatives at 36.9%—and, as we'll see below, is a bigger priority for libraries in North America than elsewhere.

Rounding out the top five is "building/facility improvements" at 35.7% of libraries. Even if remote access is a priority, facility improvements can include infrastructure items that allow high-speed, multi-user access to library resources—confirmed by seeing that "more equipment, furniture, and supplies" is a bit down the list at 29.7%.

We have seen in previous *Library Journal* surveys that Open Educational Resources (OER) are a growing interest item for academic libraries and institutions, and here it comes in at 31.5% of academic libraries. Why so comparatively low? The goal of OER is that it is a low-cost option for providing textbooks/etextbooks and other resources, so the idea is to not spend a lot on it.

There is some interest in spending a budgetary windfall on new or upgraded software or systems—"research data management tools" was selected by 26.3%, "library management system" was selected by 21.4%, and "research sharing software" was selected by 19.9%.

"Course materials" was selected by 23.4%, but it's important to bear in mind that these materials are required so don't fall into the category of "discretionary" spending of the type that a budgetary windfall would enable.

And, perhaps most tellingly, "more physical content" is the last item on the list: only 16.9% of academic libraries would spend a 25% budget windfall on print books, journals, CDs, DVDs, or other physical media.

Figure 9. If your library budget magically received an additional 25% to further the institutional mission, what might you invest in? Check all that apply.—All academic libraries
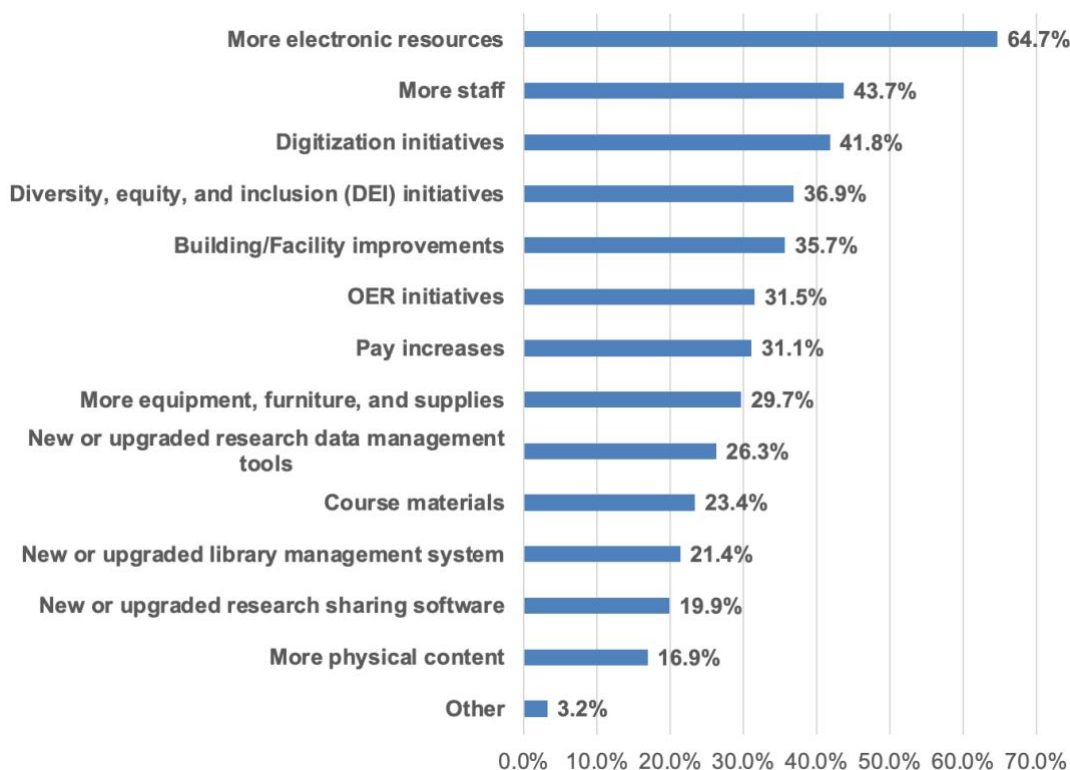
n=1,377

Top five priorities by region include:

- **North America:** More electronic resources (69.9%), more staff (57.9%), DEI initiatives (44.8%), OER initiatives (41.5%), and digitization initiatives (38.5%).
- **Latin America:** More electronic resources (65.3%), digitization initiatives (52.0%), new or upgraded research data management tools (42.6%), new or upgraded research sharing software (35.1%), and building/facility improvements (33.2%).
- **Asia:** More electronic resources (67.7%), digitization initiatives (57.3%), new or upgraded library management system (50.0%), new or upgraded research data management tools (43.8%), and more equipment, furniture, and supplies (40.6%).
- **Europe:** More electronic resources (47.3%), digitization initiatives (34.9%), building/facility improvements (32.6%), course materials (28.7%), and diversity, equity, and inclusion (DEI) initiatives tied with new or upgraded research sharing software (both 27.9%).
- **Australia/New Zealand:** More electronic resources (63.0%), digitization initiatives and more staff (tied at 40.7%), building/facility improvements (38.3%), course materials (35.8%), and OER initiatives (32.1%).

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- **Middle East/Africa:** Digitization initiatives (47.3%), diversity, equity, and inclusion (DEI) initiatives (34.5%), building/facility improvements (30.9%), new or upgraded research sharing software (27.3%), and more electronic resources (25.5%).

Table 13. If your library budget magically received an additional 25 percent to further the institutional mission, what might you invest in? Check all that apply. —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
More electronic resources	69.9%	65.3%	67.7%	47.3%	63.0%	25.5%
More staff	57.9%	25.7%	20.8%	18.6%	40.7%	7.3%
Digitization initiatives	38.5%	52.0%	57.3%	34.9%	40.7%	47.3%
Diversity, equity, and inclusion (DEI) initiatives	44.8%	28.7%	17.7%	27.9%	17.3%	34.5%
Building/Facility improvements	36.8%	33.2%	36.5%	32.6%	38.3%	30.9%
OER initiatives	41.5%	13.4%	27.1%	10.9%	32.1%	10.9%
Pay increases	36.5%	29.2%	25.0%	17.8%	24.7%	10.9%
More equipment, furniture, and supplies	29.2%	30.2%	40.6%	25.6%	29.6%	23.6%
New or upgraded research data management tools	21.0%	42.6%	43.8%	24.0%	27.2%	18.2%
Course materials	20.8%	25.2%	22.9%	28.7%	35.8%	23.6%
New or upgraded library management system	15.3%	32.7%	50.0%	19.4%	21.0%	23.6%
New or upgraded research sharing software	12.4%	35.1%	38.5%	27.9%	17.3%	27.3%
More physical content	16.0%	19.8%	16.7%	17.8%	17.3%	18.2%
Other	4.3%	2.0%	2.1%	0.8%	1.2%	1.8%

For academic libraries by enrollment, the top five priorities are:

- **Under 5,000:** More electronic resources (62.9%), more staff (43.2%), digitization initiatives (38.3%), building/facility improvements (37.1%), and pay increases (35.2%).
- **5,000–9,999:** More electronic resources (61.9%), digitization initiatives (36.0%), more staff (33.9%), diversity, equity, and inclusion (DEI) initiatives (33.6%), and building/facility improvements (31.1%).
- **10,000–19,999:** More electronic resources (66.8%), more staff (51.6%), digitization initiatives (46.5%), diversity, equity, and inclusion (DEI) initiatives (37.1%), and building/facility improvements (36.3%).
- **20,000+:** More electronic resources (68.2%), digitization initiatives (49.8%), more staff (47.5%), diversity, equity, and inclusion (DEI) initiatives (44.5%), and OER initiatives (40.1%).

For academic libraries by degrees granted (North America only), the top five priorities are:

- **Doctorate:** More electronic resources (70.8%), more staff (63.0%), diversity, equity, and inclusion (DEI) initiatives (46.0%), digitization initiatives (45.0%), and OER initiatives (43.4%).

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- **Masters:** More electronic resources (71.1%), more staff (60.3%), diversity, equity, and inclusion (DEI) initiatives (40.1%), building/facility improvements (39.7%), and pay increases (39.3%).
- **Baccalaureate:** More electronic resources (64.9%), more staff (51.9%), diversity, equity, and inclusion (DEI) initiatives (46.6%), building/facility improvements (40.1%), and digitization initiatives (37.8%).
- **Associates:** More electronic resources (67.8%), more staff (49.3%), OER initiatives (46.1%), diversity, equity, and inclusion (DEI) initiatives (44.1%), and more equipment, furniture, and supplies (42.1%).

Table 14. If your library budget magically received an additional 25 percent to further the institutional mission, what might you invest in? Check all that apply.—Academic libraries by enrollment and degree granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
More electronic resources	62.9%	61.9%	66.8%	68.2%	70.8%	71.1%	64.9%	67.8%
More staff	43.2%	33.9%	51.6%	47.5%	63.0%	60.3%	51.9%	49.3%
Digitization initiatives	38.3%	36.0%	46.5%	49.8%	45.0%	33.1%	37.8%	23.7%
Diversity, equity, and inclusion (DEI) initiatives	34.7%	33.6%	37.1%	44.5%	46.0%	40.1%	46.6%	44.1%
Building/Facility improvements	37.1%	31.1%	36.3%	37.8%	36.4%	39.7%	40.1%	34.2%
OER initiatives	28.4%	25.2%	35.5%	40.1%	43.4%	38.8%	36.6%	46.1%
Pay increases	35.2%	24.8%	30.5%	30.8%	40.8%	39.3%	36.3%	25.7%
More equipment, furniture, and supplies	31.1%	28.0%	30.1%	29.1%	26.6%	33.5%	31.3%	42.1%
New or upgraded research data management tools	21.6%	28.0%	29.3%	30.1%	26.9%	20.7%	18.7%	15.8%
Course materials	22.9%	25.9%	19.1%	25.8%	18.3%	20.7%	24.4%	27.6%
New or upgraded library management system	21.8%	24.5%	21.9%	17.4%	12.4%	17.8%	17.2%	17.1%
New or upgraded research sharing software	20.1%	19.6%	20.7%	18.7%	11.9%	11.6%	14.1%	12.5%
More physical content	18.9%	16.8%	14.5%	15.4%	14.0%	17.8%	16.4%	17.1%
Other	2.5%	1.7%	4.7%	4.3%	4.7%	2.5%	3.4%	6.6%

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Library Mission

What factors are important for an academic institution and its library to fulfill its mission? What are some of the top challenges libraries face in achieving that mission? What purchasing decisions and software features contribute to a library's fulfilling of its mission?

Important Mission Factors

We look at important mission-critical factors in terms of:

- The institution
- The library

The questionnaire had the ranked choices:

- High importance
- Medium importance
- Low importance
- No importance
- Don't know

The charts and tables below summarize those factors that were selected as having "high importance."

The Institution's Mission

Student engagement (76.0% of academic libraries said it was of high) and student retention (72.2%) are the two most important contributing factors for an institution's mission. Research excellence (59.5%) and affordable learning (54.0%) are of lesser, but certainly not no, importance across all regions and library sizes, although there are marked differences between institution types. (We'll look at affordable learning in the next chapter.)
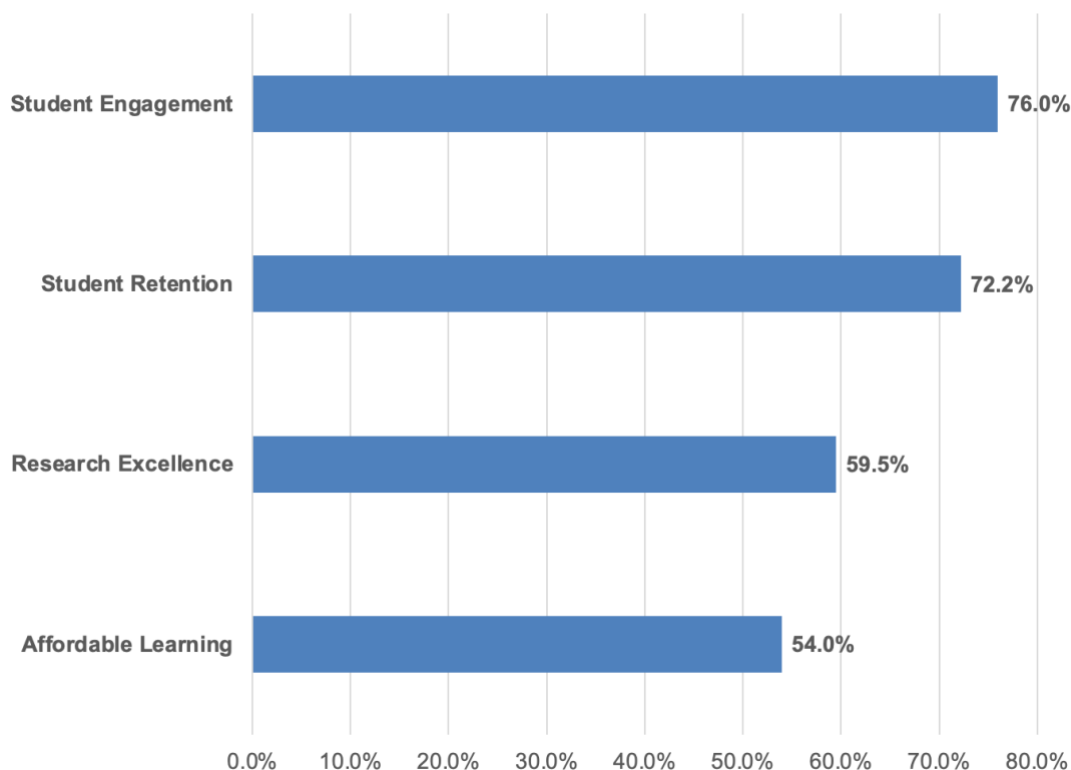
n=1,378

Student engagement is the top priority for academic institutions in North America (84.0%) and Latin America (77.5%, although research excellence is a close second at 77.0%), while student retention takes precedence in Oceania (84.0%) and Asia (71.1%). In both Europe (55.7%) and the Middle East/Africa (45.3%), research excellence holds the greatest importance, although the percentages are much lower than in other regions.

Top three highest rated by region include:

- **North America:** Student engagement (84.0%), student retention (80.9%), and affordable learning (54.7%).
- **Latin America:** Student engagement (77.5%), research excellence (77.0%), and affordable learning (70.2%).
- **Asia:** Student retention (71.1%), student engagement (70.5%), and research excellence (66.0%).
- **Europe:** Research excellence (55.7%), student engagement (48.8%), and student retention (35.0%).
- **Australia/New Zealand:** Student retention (84.0%), student engagement (82.7%), and research excellence (76.8%).

- **Middle East/Africa:** Research excellence (45.3%), affordable learning (37.7%), and student retention (35.2%).

Table 15. How important are each of the following to your institution's mission? HIGH IMPORTANCE —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Student Engagement	84.0%	77.5%	70.5%	48.8%	82.7%	25.9%
Student Retention	80.9%	66.7%	71.1%	35.0%	84.0%	35.2%
Research Excellence	53.6%	77.0%	66.0%	55.7%	76.8%	45.3%
Affordable Learning	54.7%	70.2%	63.8%	32.0%	35.8%	37.7%

The importance of student engagement rises slightly with enrollment and, not unexpectedly, with advancing degree. Research excellence is more of a priority for the largest institutions (20,000+ enrollment) and, also not unexpectedly, institutions granting doctorates (research is a major part of a doctoral program). Affordable learning as an influencer on the school mission spikes among institutions granting associates degrees.

Top three highest rated by degree granted include:

- **Doctorate:** Student engagement (86.1%), Student retention (80.8%), and research excellence (71.5%).
- **Masters:** Student engagement (87.1%), student retention (85.0%), and affordable learning (49.4%).
- **Baccalaureate:** Student engagement (82.5%), student retention (77.0%), and affordable learning (51.4%).
- **Associates:** Student retention (81.1%), affordable learning (79.0%), and student engagement (76.2%).

Table 16. How important are each of the following to your institution's mission? HIGH IMPORTANCE — Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Student Engagement	74.8%	70.6%	79.2%	80.8%	86.1%	87.1%	82.5%	76.2%
Student Retention	72.0%	64.2%	75.7%	77.4%	80.8%	85.0%	77.0%	81.1%
Research Excellence	50.7%	51.4%	64.1%	77.8%	71.5%	47.2%	47.8%	22.0%
Affordable Learning	51.5%	54.2%	56.8%	55.9%	48.8%	49.4%	51.4%	79.0%

The Library's Mission

The top three most important factors for the library's mission are to "provide an excellent patron experience" (76.4%), "teach students research and information skills" (72.8%), and "support the

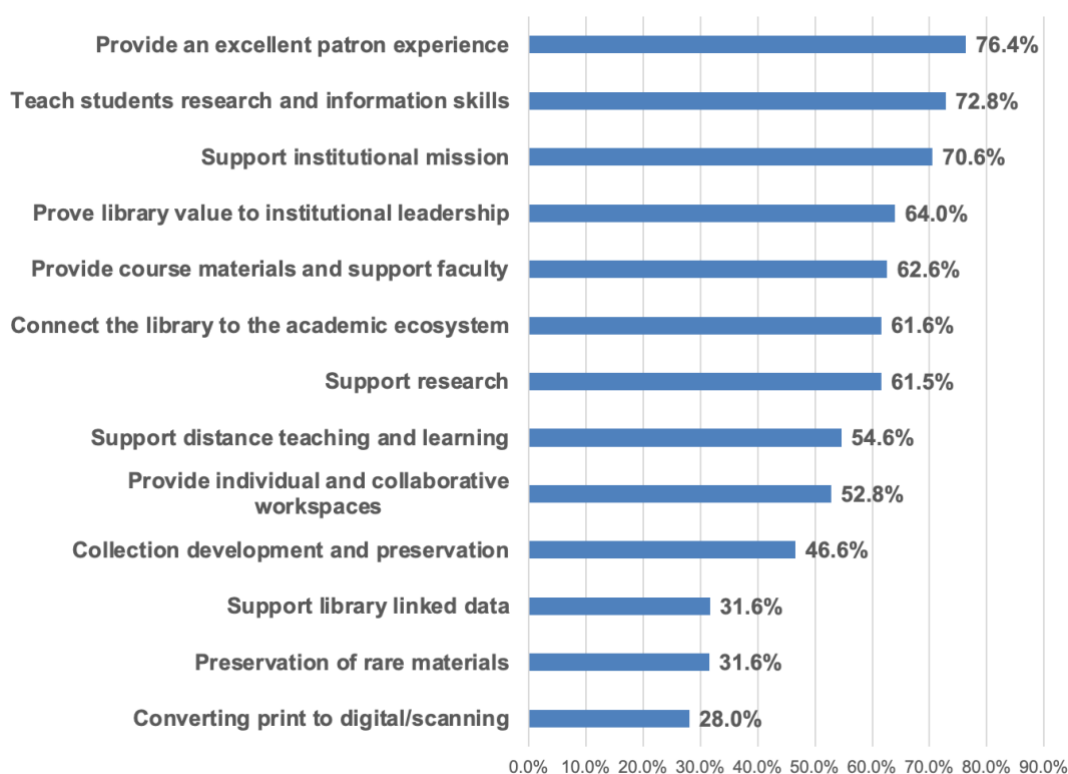*Sponsored by*

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institutional mission" (70.6%). At number four is "prove library value to institutional leadership" (64.0%)—we have seen in past *Library Journal* surveys of academic libraries that a slightly adversarial relationship between faculty and library sometimes exists, or at the very least an opportunity to improve communication and alignment of goals to meet student needs. At the very least, they want to prove their value to administrators to secure funding, because institutional leadership holds the purse strings.

In keeping with what is turning out to be the theme of this report, "support distance teaching and learning" was selected by 54.6% of academic libraries. It may be more than halfway down this list of high importance items, at least in the context of supporting the library's mission, but that it was selected as highly important by more than one-half of respondents suggests that it is, if not top of mind, at least on the mind of library staff.

Figure 11. How important are each of the following to your library's mission? HIGH IMPORTANCE —All academic libraries

Category	Percentage
Provide an excellent patron experience	76.4%
Teach students research and information skills	72.8%
Support institutional mission	70.6%
Prove library value to institutional leadership	64.0%
Provide course materials and support faculty	62.6%
Connect the library to the academic ecosystem	61.6%
Support research	61.5%
Support distance teaching and learning	54.6%
Provide individual and collaborative workspaces	52.8%
Collection development and preservation	46.6%
Support library linked data	31.6%
Preservation of rare materials	31.6%
Converting print to digital/scanning	28.0%

n=1,377

"Providing an excellent patron experience" to students and faculty members received the highest importance ratings in every region measured. In Latin America and Oceania, multiple choices put forth in the question received over seventy percent high importance ratings. "Converting print to digital scanning" and "collection development and preservation" appear in the top three list for academic libraries in the Middle East/Africa.

Top three highest rated by region include:

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- **North America:** Provide an excellent patron experience (81.1%), teach students research and information skills (78.9%), and support institutional mission (76.9%).
- **Latin America:** Provide an excellent patron experience (77.1%), teach students research and information skills (76.7%), and support research (75.3%).
- **Asia:** Provide an excellent patron experience (72.0%), support research (65.3%), and teach students research and information skills (65.1%).
- **Europe:** Provide an excellent patron experience (54.0%), support research (52.4%), and support institutional mission (52.0%).
- **Australia/New Zealand:** Provide an excellent patron experience (87.7%), support research (77.8%), and support institutional mission (76.8%).
- **Middle East/Africa:** Provide an excellent patron experience (52.9%), converting print to digital scanning (48.1%), and collection development and preservation (47.1%).

Table 17. How important are each of the following to your library's mission? HIGH IMPORTANCE — Academic libraries by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Provide an excellent patron experience	81.1%	77.1%	72.0%	54.0%	87.7%	52.9%
Teach students research and information skills	78.9%	76.7%	65.1%	49.6%	73.8%	44.0%
Support institutional mission	76.9%	73.2%	56.8%	52.0%	76.8%	42.3%
Prove library value to institutional leadership	68.8%	73.7%	59.1%	41.1%	70.0%	13.7%
Provide course materials and support faculty	63.3%	72.3%	59.3%	50.0%	74.1%	39.2%
Connect the library to the academic ecosystem	64.1%	71.6%	56.0%	42.7%	69.1%	38.5%
Support research	58.5%	75.3%	65.3%	52.4%	77.8%	40.4%
Support distance teaching/learning	53.9%	70.0%	51.0%	49.2%	53.1%	34.6%
Provide individual and collaborative workspaces	53.9%	61.5%	47.3%	39.5%	65.4%	30.8%
Collection development and preservation	44.3%	61.6%	45.9%	39.0%	45.7%	47.1%
Preservation of rare materials	25.9%	45.0%	39.9%	35.2%	28.4%	36.5%
Support library linked data	24.5%	58.3%	39.9%	28.2%	23.8%	39.2%
Converting print to digital/scanning	17.3%	53.7%	37.9%	32.5%	33.3%	48.1%

Looking at the top three in importance to the library's mission by size, the same three appear for small (< 5,000 students) to mid to large size libraries (serving 10K-19.9K students). It is only the very largest schools that stray from the same three answers. The top three for academic libraries serving over 20,000 students are: support institutional mission (78.0%), provide an excellent patron experience (76.2%), and support research (73.6%).

Looking at the top three in importance by degrees granted (North America only) reveals that teaching students research and information skills becomes number one for Masters and Associates colleges.

- **Doctorate:** Provide and excellent patron experience (83.3%), support institutional mission (80.4%), and both support research and teach students research and information skills (tied at 77.4%).
- **Masters:** Teach students research and information skills (80.3%), provide an excellent patron experience (78.9%), and support institutional mission (77.0%).
- **Baccalaureate:** Provide and excellent patron experience (79.4%), teach students research and information skills (79.3%), and support institutional mission (71.4%).
- **Associates:** Teach students research and information skills (81.6%), provide an excellent patron experience (77.8%), and support institutional mission (69.2%).

Table 18. How important are each of the following to your library's mission? HIGH IMPORTANCE —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Provide an excellent patron experience	79.7%	69.6%	77.4%	76.2%	83.3%	78.9%	79.4%	77.8%
Teach students research and information skills	76.0%	67.6%	74.5%	71.2%	77.4%	80.3%	79.3%	81.6%
Support institutional mission	69.0%	60.6%	74.8%	78.1%	80.4%	77.0%	71.4%	69.2%
Prove library value to institutional leadership	61.8%	54.0%	69.5%	71.9%	73.5%	71.1%	62.9%	54.2%
Provide course materials and support faculty	61.7%	55.6%	64.0%	69.7%	63.7%	60.6%	65.2%	62.0%
Connect the library to the academic ecosystem	56.8%	57.3%	63.2%	72.1%	71.2%	66.4%	59.9%	47.2%
Support research	55.4%	53.8%	67.1%	73.6%	77.4%	49.8%	51.6%	28.9%
Support distance teaching/learning	52.5%	53.7%	56.0%	58.0%	52.3%	55.5%	48.4%	59.0%
Provide individual and collaborative workspaces	51.4%	52.6%	51.3%	56.5%	52.2%	52.8%	51.8%	45.5%
Collection development and preservation	48.4%	40.2%	42.5%	52.0%	45.1%	42.9%	42.4%	32.2%
Preservation of rare materials	28.0%	30.2%	30.5%	38.9%	30.6%	23.8%	29.8%	11.8%
Support library linked data	29.5%	33.1%	27.7%	37.0%	23.8%	27.9%	29.1%	22.5%
Converting print to digital/scanning	27.7%	26.5%	23.6%	32.8%	18.2%	15.2%	18.7%	9.7%

Library Challenges

The number one challenge named by academic libraries is "acquisitions budget limitations"—a perennial challenge for libraries, selected by 61.1% of libraries. The number two challenge is "staff shortages," selected by 53.9%. Interestingly, as we saw in the budget windfall question earlier, if libraries suddenly received an extra 25 percent of their budget, less than half would use it to hire more staff. Number three is "communication and collaboration with faculty" (46.7%). Related to budget limitations is "funding cuts" at number four, selected by 41.1%. Rounding out the top five is "staff training," a significant challenge for one-third of respondents.

Supporting remote students is down at 28.8% of libraries. As we see elsewhere in this report, the major drive is to boost the resources needed to support remote students. But academic libraries

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have been supporting remote students for more than a decade, so while they are challenged by it, it is not necessarily the *most* significant challenge.

Figure 12. Which of the following are significant challenges for your library? Check all that apply.—All academic libraries

Challenge	Percentage
Acquisitions budget limitations	61.1%
Staff shortages	53.9%
Communication and collaboration with faculty	46.7%
Funding cuts	41.1%
Staff training	33.4%
Communication with administration	32.4%
Other depts want to use library for specific purposes	29.6%
Lack of physical space	29.6%
Supporting remote students	28.8%
Supporting diversity, equity, inclusion initiatives	28.4%
Cataloging and metadata management	26.6%
Supporting affordable learning	26.5%
Challenges with discovering multiple resource formats	24.7%
Inadequate IT systems	23.1%
Discovery of resources	22.5%
Controlled digital lending	21.8%
Facilities management	21.7%
Collaborating with other libraries	20.5%
Inadequate insight to resource usage	18.6%
Supporting international students	18.5%
Equipment management	16.6%
Linking to resources	14.6%
Consortia collaboration	14.6%
Other	3.8%
None of the above	0.8%

n=1,305

Looking at the top five challenges for academic libraries in specific regions:

- **North America:** Acquisitions budget limitations (66.4%), staff shortages (64.4%), funding cuts (49.9%), communication and collaboration with faculty (47.1%), and communication with administration (37.7%). (In previous iterations of the State of Academic Libraries survey, conducted among North American institutions only, funding cuts was the top answer in Spring 2020, while in 2019 acquisitions budget limitations was again selected most often.)
- **Latin America:** Acquisitions budget limitations (59.4%), communication and collaboration with faculty (57.2%), staff training (55.6%), collaborating with other libraries (48.7%), and challenges with discovering multiple resource formats (40.1%).
- **Asia:** Acquisitions budget limitations (65.1%), inadequate IT systems (47.7%), staff training (44.2%), staff shortages (44.2%), and challenges with discovering multiple resource formats (41.9%).

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- **Europe:** Communication and collaboration with faculty (41.1%), staff training (37.1%), acquisitions budget limitations (33.1%), staff shortages (33.1%), and collaborating with other libraries (29.8%).
- **Australia/New Zealand:** Acquisitions budget limitations (65.8%), staff shortages (51.9%), funding cuts (45.6%), communication and collaboration with faculty (44.3%), and staff training (35.4%.)
- **Middle East/Africa:** Acquisitions budget limitations (43.4%), challenges with discovering multiple resource formats (35.8%), communication and collaboration with faculty (34.0%), staff training (32.1%), collaborating with other libraries (32.1%), and supporting diversity, equity, and inclusion initiatives (also 32.1%).

Table 19. Which of the following are significant challenges for your library? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Acquisitions budget limitations	66.4%	59.4%	65.1%	33.1%	65.8%	43.4%
Staff shortages	64.4%	38.5%	44.2%	33.1%	51.9%	26.4%
Communication and collaboration with faculty	47.1%	57.2%	37.2%	41.1%	44.3%	34.0%
Funding cuts	49.9%	27.3%	37.2%	19.4%	45.6%	15.1%
Staff training	26.2%	55.6%	44.2%	37.1%	35.4%	32.1%
Communication with administration	37.7%	33.7%	23.3%	20.2%	21.5%	11.3%
Lack of physical space	32.3%	28.9%	29.1%	24.2%	21.5%	13.2%
Other departments want to use library space for specific purposes	33.2%	24.6%	23.3%	22.6%	22.8%	26.4%
Supporting remote students	28.8%	36.4%	32.6%	25.8%	20.3%	17.0%
Supporting diversity, equity, inclusion initiatives	31.6%	29.9%	23.3%	14.5%	19.0%	32.1%
Cataloging and metadata management	23.4%	35.8%	30.2%	29.0%	31.6%	22.6%
Supporting affordable learning	28.1%	32.6%	17.4%	18.5%	19.0%	26.4%
Challenges with discovering multiple resource formats	17.5%	40.1%	41.9%	27.4%	29.1%	35.8%
Inadequate IT systems	21.7%	26.2%	47.7%	13.7%	24.1%	17.0%
Discovery of resources	20.0%	31.0%	27.9%	21.0%	30.4%	11.3%
Controlled digital lending	19.1%	31.6%	30.2%	21.8%	21.5%	17.0%
Facilities management	22.1%	24.6%	25.6%	16.1%	16.5%	17.0%
Collaborating with other libraries	10.4%	48.7%	30.2%	29.8%	19.0%	32.1%
Inadequate insight to resource usage	19.4%	17.6%	26.7%	9.7%	21.5%	15.1%
Supporting international students	16.8%	19.3%	18.6%	26.6%	19.0%	24.5%
Equipment management	12.3%	32.6%	23.3%	16.1%	13.9%	15.1%
Consortia collaboration	10.4%	33.2%	16.3%	13.7%	13.9%	11.3%
Linking to resources	10.0%	18.7%	32.6%	21.0%	17.7%	18.9%
Other	4.7%	2.7%	0.0%	2.4%	5.1%	3.8%
None of the above	1.2%	0.0%	0.0%	0.8%	0.0%	0.0%

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Acquisitions budget limitations are a greater challenge at larger schools. Staff shortages are the biggest challenge at libraries in Associates colleges.

Looking at the top five challenges by size of institution:

- **Less than 5,000:** Acquisitions budget limitations (59.5%), staff shortages (52.9%), communication and collaboration with faculty (50.3%), funding cuts (38.3%), and communication with administration (34.5%).
- **5,000 to 9,999:** Staff shortages (52.8%), acquisitions budget limitations (50.2%), communication and collaboration with faculty (44.2%), staff training (33.5%) and funding cuts (33.1%).
- **10,000 to 19,999:** Acquisitions budget limitations (70.2%), staff shortages (58.4%), funding cuts (49.4%), communication and collaboration with faculty (44.5%), and staff training (34.7%).
- **More than 20,000:** Acquisitions budget limitations (65.4%), staff shortages (52.7%), funding cuts (45.9%), communication and collaboration with faculty (45.2%), staff training and supporting diversity, equity, and inclusion initiatives (tied at 35.3%).

Looking at the top five challenges by degrees granted (North America only):

- **Doctorate:** Acquisitions budget limitations (74.6%), staff shortages (70.2%), funding cuts (58.2%), communication and collaboration with faculty (45.4%), and communications with administration (38.0%).
- **Masters:** Acquisitions budget limitations (65.8%), staff shortages (65.8%), funding cuts (55.0%), communication and collaboration with faculty (53.7%), and communication with administration (39.0%).
- **Baccalaureate:** Acquisitions budget limitations (60.4%), staff shortages (58.4%), communication and collaboration with faculty (48.8%), funding cuts (46.0%), and other departments want to use library space for specific purposes (38.8%).
- **Associates:** Staff shortages (60.1%), communication and collaboration with faculty (55.2%), acquisitions budget limitations (51.7%), funding cuts (39.9%), and communication with administration (39.9%).

Table 20. Which of the following are significant challenges for your library? Check all that apply. —Academic libraries by enrollment and degrees granted

|	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Acquisitions budget limitations	59.5%	50.2%	70.2%	65.4%	74.6%	65.8%	60.4%	51.7%
Staff shortages	52.9%	52.8%	58.4%	52.7%	70.2%	65.8%	58.4%	60.1%
Communication and collaboration with faculty	50.3%	44.2%	44.5%	45.2%	45.4%	53.7%	48.8%	55.2%
Funding cuts	38.3%	33.1%	49.4%	45.9%	58.2%	55.0%	46.0%	39.9%
Staff training	31.5%	33.5%	34.7%	35.3%	26.8%	26.0%	27.6%	25.9%
Communication with administration	34.5%	30.5%	32.7%	29.3%	38.0%	39.0%	36.8%	39.9%
Lack of physical space	30.5%	29.7%	26.9%	30.0%	32.5%	32.0%	30.0%	35.0%
Other departments want to use library space for specific purposes	30.7%	32.7%	29.0%	24.7%	33.3%	35.9%	38.8%	37.1%
Supporting remote students	28.3%	24.9%	29.4%	32.9%	30.6%	28.1%	23.6%	35.0%
Supporting diversity, equity, inclusion initiatives	25.3%	23.0%	33.5%	35.3%	34.2%	28.1%	30.8%	28.7%
Cataloging and metadata management	26.1%	24.9%	29.0%	26.5%	24.9%	24.2%	21.2%	23.1%
Supporting affordable learning	27.5%	23.8%	22.4%	31.4%	28.1%	28.1%	32.0%	28.7%
Challenges with discovering multiple resource formats	29.3%	21.9%	20.0%	23.0%	16.4%	14.3%	18.4%	21.0%
Inadequate IT systems	23.0%	21.9%	27.8%	20.8%	18.9%	19.5%	22.8%	30.1%
Discovery of resources	20.6%	22.7%	22.0%	26.1%	22.1%	17.7%	19.6%	25.9%
Controlled digital lending	19.2%	24.2%	21.2%	25.1%	23.2%	15.2%	18.0%	14.0%
Facilities management	24.6%	20.4%	22.0%	18.0%	18.9%	22.9%	25.2%	26.6%
Collaborating with other libraries	23.2%	21.9%	15.5%	18.7%	10.7%	8.7%	11.6%	11.9%
Inadequate insight to resource usage	18.6%	13.8%	20.8%	20.8%	19.4%	18.2%	18.4%	23.1%
Supporting international students	17.4%	17.1%	16.3%	24.4%	17.8%	10.0%	16.0%	18.9%
Equipment management	17.0%	16.4%	20.0%	13.4%	8.7%	11.7%	16.4%	16.8%
Consortia collaboration	13.0%	16.7%	12.7%	17.0%	10.9%	8.7%	10.8%	10.5%
Linking to resources	13.4%	13.0%	14.7%	18.4%	10.1%	10.0%	10.0%	8.4%
Other	4.0%	1.9%	5.7%	3.9%	4.6%	3.9%	4.0%	7.0%
None of the above	0.6%	1.5%	0.0%	1.1%	0.8%	2.2%	1.2%	1.4%

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Remote Students

Although academic institutions have served remote or distance learning students for at least the past decade, the COVID-19 pandemic turned even in-person students into remote learners as campuses were closed or only open on a limited basis. There had been the hope that 2020 would be an anomaly, but the persistence of the virus and the proliferation of the highly contagious Delta variant have caused many students (and/or their parents)—if not institutional administration—to rethink on-campus presence in favor of hybrid models of teaching, or remote learning. While academic institutions and their libraries are no strangers to remote access of their facilities, the issue now becomes one of volume. Can institutions and libraries support such an increased number of students accessing remotely? What changes to library services will be needed to support this extra volume, and how likely is the library to implement what changes are necessary?

When asked how likely libraries are to implement changes to library services based on the experience of serving more remote students, six out of ten (60.3%) say they are likely, 27.2% of them "very" likely. Almost one-third (31.5%) are unlikely, although only 8.6% "very unlikely."

Figure 13. How likely is the library to implement changes to library services based on the experience of serving more remote students? —All academic libraries
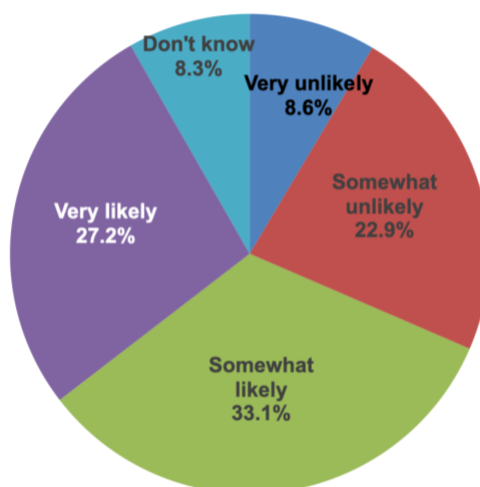
n=1,366

Academic libraries in Latin America are the most likely to implement whatever changes need to be made to support a higher volume of remote students—40.4% selected "very likely." Academic libraries in the Middle East and Africa were the least likely—16.7% were "very likely," and, in fact, 42.6% selected "somewhat unlikely." Academic libraries in Europe were also less likely than average to implement any needed changes—45.6% were at all likely, and 31.2% selected "somewhat unlikely."

The likelihood of implementing needed changes perhaps not unexpectedly increases with size of institution—from 56.0% of small institution libraries (under 5,000 enrollment) saying they are at

all likely up to 69.5% of large institution libraries (over 20,000 enrollment) saying they are at all likely.

The same basic pattern applies to libraries by degree given—the more advanced the degree, generally the more likely they are to implement any needed changes.

Table 21. How likely is the library to implement changes to library services based on the experience of serving more remote students? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Very likely	27.1%	40.4%	27.2%	19.2%	18.8%	16.7%
Somewhat likely	35.9%	23.0%	34.7%	26.4%	46.3%	14.8%
Somewhat unlikely	22.8%	18.6%	19.0%	31.2%	16.3%	42.6%
Very unlikely	6.7%	13.1%	8.8%	9.6%	11.3%	11.1%
Don't know	7.4%	4.9%	10.2%	13.6%	7.5%	14.8%

Table 22. How likely is the library to implement changes to library services based on the experience of serving more remote students? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Very unlikely	8.8%	11.9%	6.9%	6.3%	6.3%	6.5%	9.2%	5.6%
Somewhat unlikely	26.2%	24.8%	20.1%	17.9%	19.5%	19.5%	30.4%	22.2%
Somewhat likely	31.1%	30.8%	32.4%	39.7%	40.0%	35.1%	32.0%	30.6%
Very likely	24.9%	25.5%	30.5%	29.8%	27.7%	28.1%	19.2%	35.4%
Don't know	9.0%	7.0%	10.0%	6.3%	6.6%	10.8%	9.2%	6.3%

When we talk about "implementing changes to library services," what specifically are we talking about? We asked an open-ended question about their top priorities for change, and here is a representative sampling of the responses from libraries that had said they were either very or somewhat likely to implement needed changes:

- Expand current distance learning services
- Increased access to electronic resources
- Bandwidth for remote access
- Acquisition of more electronic resources
- Chat service hours/staff expanded
- Continuing to provide online/Zoom events
- Creating video to replace in-person library instruction
- Getting better at providing remote services
- Learning how to engage students through remote formats

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- Increase budget for the acquisition of more digital resources
- Fewer physical books, more electronic books
- OERs
- Remote use of physical collections
- Subscriptions to more e-journals or converting current print subscriptions to e-journals

Important Technology Purchase Criteria

Libraries purchase a lot of technology and had been doing so long before COVID. Many libraries were early adopters of electronic library resources. As experienced technology purchasers, what are the most important aspects of technology procurement? We asked libraries to rank these items in order of importance; the chart and tables below show those items that were deemed to have a high importance.

The top three most important aspects of technology purchasing are product support (63.9%), interoperability and integrations (54.6%), and simple, easy administration (54.1%). In essence, they are concerned with how well the vendor supports the product, whether it integrates with other library systems and software, and how easy it is to administer. Product training and documentation round out the top five—again, does the vendor make it easy to use. Note that lowest price and open-source are at the bottom of the list. While they are of some importance to very cost-conscious libraries, often those two items are diametrically opposed to the items at the top of the importance list.

Figure 14. How important are the following when you library purchases technology systems and services? HIGH IMPORTANCE —All academic libraries
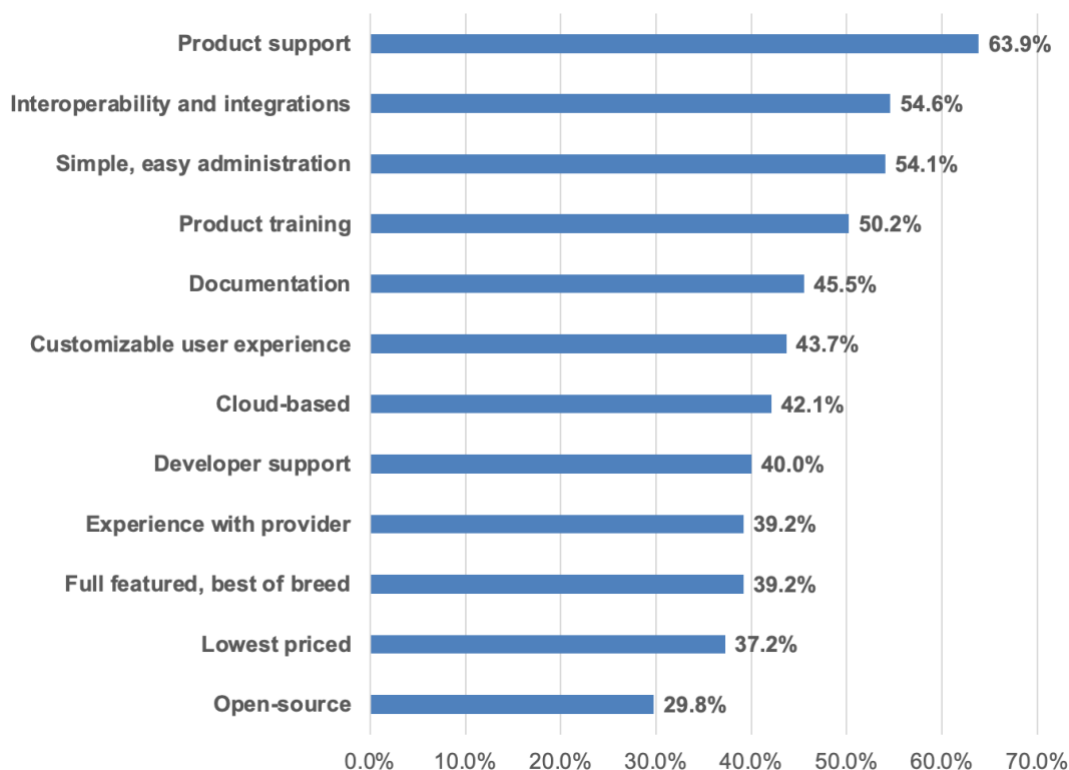
n=1,318

There are some interesting variations in the top three by region:

- **North America:** Product support (65.0%), interoperability and integrations (53.0%), and simple, easy administration (51.3%).
- **Latin America:** Product training (72.0%), product support (71.3%), and simple, easy administration tied with full featured, best of breed (both 68.4%).
- **Asia:** Product training (64.3%), product support (64.3%), and lowest priced (59.6%).
- **Europe:** Simple, easy administration (52.1%), product support (51.3%), and interoperability and integrations (49.2%).
- **Australia/New Zealand:** Product support (68.8%), interoperability and integrations (62.8%), and simple, easy administration (58.8%).
- **Middle East/Africa:** Product support (45.1%), product training (41.2%), and full featured, best of breed (39.2%).

By enrollment, the top three are consistent across all four size breakdowns: product support, interoperability and integrations, and simple, easy administration. By degree granted (North America only), the same factors dominate the top three, although associates colleges gave more weight to product training and institutions that grant doctorate degrees would include documentation in their top three.

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Table 23. How important are the following when your library purchases technology systems and services? HIGH IMPORTANCE —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Product support	65.0%	71.3%	64.3%	51.3%	68.8%	45.1%
Simple, easy administration	51.3%	68.4%	58.7%	52.1%	58.8%	30.0%
Interoperability and integrations	53.0%	63.6%	58.6%	49.2%	62.8%	36.7%
Product training	45.4%	72.0%	64.3%	40.0%	43.0%	41.2%
Documentation	44.4%	58.3%	49.3%	41.2%	38.8%	28.6%
Customizable user experience	37.0%	63.0%	57.4%	45.5%	43.6%	32.7%
Cloud-based	39.1%	52.6%	50.4%	34.7%	57.5%	20.8%
Developer support	33.0%	60.1%	55.6%	39.5%	40.0%	34.0%
Experience with provider	33.1%	64.8%	51.1%	30.5%	35.0%	30.6%
Full featured, best of breed	29.6%	68.4%	51.8%	43.7%	32.9%	39.2%
Lowest priced	30.9%	54.3%	59.6%	32.5%	27.8%	36.0%
Open-source	23.7%	48.6%	46.5%	25.2%	25.0%	26.9%

Table 24. How important are the following when your library purchases technology systems and services? HIGH IMPORTANCE —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Product support	65.5%	60.3%	65.9%	62.1%	64.1%	68.8%	65.3%	66.0%
Simple, easy administration	58.7%	55.1%	50.0%	48.8%	42.9%	54.9%	51.3%	61.7%
Interoperability and integrations	49.8%	58.3%	53.5%	60.0%	53.7%	52.5%	49.4%	45.3%
Product training	49.1%	54.5%	50.0%	47.6%	42.1%	47.5%	45.8%	48.2%
Documentation	44.2%	45.5%	48.2%	45.4%	43.9%	51.6%	46.9%	41.1%
Customizable user experience	43.5%	45.4%	39.8%	46.2%	35.8%	37.7%	40.5%	34.8%
Cloud-based	37.0%	42.4%	44.5%	47.4%	42.1%	39.2%	33.1%	27.3%
Developer support	38.8%	38.3%	39.4%	43.7%	36.0%	32.0%	30.4%	27.0%
Experience with provider	39.4%	40.8%	37.7%	38.2%	29.2%	33.8%	34.9%	32.9%
Full featured, best of breed	39.3%	40.9%	34.1%	41.0%	25.7%	26.6%	31.3%	25.9%
Lowest priced	45.0%	40.5%	32.3%	25.9%	23.9%	39.3%	36.3%	33.3%
Open-source	28.3%	30.7%	29.5%	30.9%	22.9%	22.9%	24.0%	17.4%

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Cataloging

Expected Budget Changes

One key resource for library users is basic cataloging—after all, other library resources are not helpful if they cannot be easily found. As more digital materials are acquired and added to library collections, they need to be cataloged effectively. So, in this question, we asked if libraries expect to reduce cataloging budgets in the next 12 months. Four out of ten academic libraries (41.1%) think it likely (12.4% very likely and 28.7% somewhat likely) that the library will reduce its cataloging budget, while 42.7% think it unlikely (14.4% very unlikely and 28.3% somewhat unlikely).

Figure 15. How likely is your library to reduce its cataloging budget in the next year? —All academic libraries
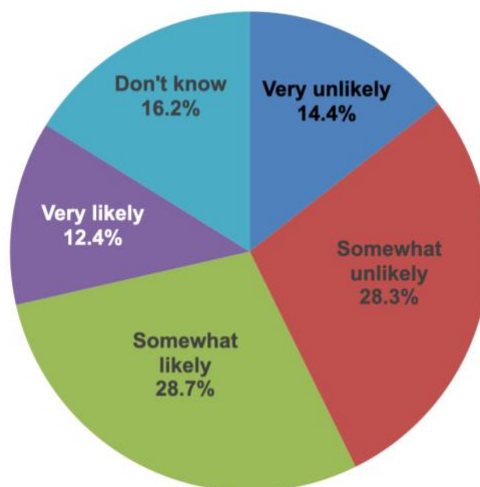
n=1,337

Libraries in the Middle East/Africa and Latin America are the most likely to reduce their cataloging budgets in the next year (57.4% and 53.6%, respectively, say reductions are very or somewhat likely).

Libraries at the smallest institutions are the least likely (37.8% very or somewhat likely) to reduce their cataloging budgets in the next year.

Table 25. How likely is your library to reduce its cataloging budget in the next year? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Very unlikely	16.0%	12.2%	13.4%	11.3%	12.7%	13.0%
Somewhat unlikely	28.1%	21.5%	31.0%	37.9%	26.6%	27.8%
Somewhat likely	25.6%	37.0%	26.1%	33.9%	30.4%	38.9%
Very likely	11.5%	16.6%	12.0%	8.9%	13.9%	18.5%
Don't know	18.9%	12.7%	17.6%	8.1%	16.5%	1.9%

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Table 26. How likely is your library to reduce its cataloging budget in the next year? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Very unlikely	17.8%	14.5%	11.7%	11.1%	12.5%	18.8%	15.6%	18.4%
Somewhat unlikely	31.2%	27.6%	30.4%	22.6%	27.6%	28.1%	24.7%	31.2%
Somewhat likely	27.3%	26.9%	29.6%	32.4%	24.7%	22.3%	28.8%	22.0%
Very likely	10.5%	17.3%	12.1%	11.1%	11.6%	12.1%	13.6%	13.5%
Don't know	13.2%	13.8%	16.3%	22.6%	23.6%	18.8%	17.3%	14.9%

Linked Data Cataloging

Library linked data (LLD) standards are being developed to ideally reduce redundant cataloging efforts and increase library resource visibility. For example, library data tends to be stored in proprietary databases and is invisible to general web searches. So linked data cataloging can help make library collections searchable via Google.[9] Are academic libraries interested in linked data cataloging? One-third (33.6%) are interested in linked data cataloging, while a further 22.2% say maybe. Only 13.1% are uninterested, but another nearly one-third (31.1%) don't know, likely due to unfamiliarity with the technology.

Figure 16. Is your library interested in linked data? —All academic libraries
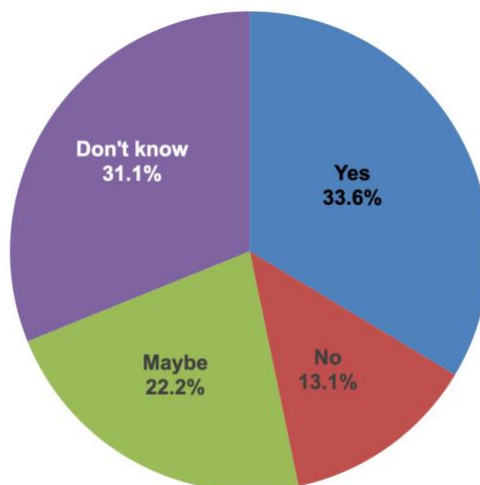
n=1,327

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[9] Studies have found that most searches start via Google or elsewhere on the Web rather than via library websites or catalogs—see, for example, https://www.oclc.org/research/publications/2010/2010perceptions.html.

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Academic libraries in Latin America (45.2%) and Europe (40.5%) are the most interested in linked data cataloging, while those in Oceania (21.5%) and Asia (21.4%) are the least interested. Libraries in North America (39.5%) are the most likely to say they don't know.

Generally, interest in linked data cataloging increases by institution size (43.1% of libraries at the largest institutions are interested) although the smallest are the most likely to not know (36.2%). Doctorate granting institutions are most likely to be interested in linked data (35.2%).

**Table 27. Is your library interested in linked data? —Academic libraries by region**

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Yes	30.3%	45.2%	33.1%	40.5%	27.8%	36.5%
No	9.2%	14.1%	21.4%	17.4%	21.5%	19.2%
Maybe	20.9%	19.2%	30.3%	24.0%	16.5%	28.8%
Don't know	39.5%	21.5%	15.2%	18.2%	34.2%	15.4%

Table 28. Is your library interested in linked data? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Yes	26.6%	38.4%	31.1%	43.1%	35.2%	24.0%	28.5%	22.1%
No	15.2%	14.0%	10.6%	10.8%	4.5%	11.3%	8.7%	12.1%
Maybe	22.0%	21.9%	24.8%	20.7%	21.0%	20.8%	19.4%	22.1%
Don't know	36.2%	25.8%	33.5%	25.4%	39.2%	43.9%	43.4%	43.6%

Following up on this question, we asked if the library was actively working on plans to shift to linked data cataloging. Of the 55.8% of academic libraries that said they were or were maybe interested in linked data cataloging, 54.2% said that they did have plans underway, with 9.1% saying they are already doing most of their cataloging via linked data and 12.4% saying they are doing "some" cataloging via linked data. Eight percent say they will be "beginning soon," while 24.7% say they do have plans, but won't be starting in the next 18 months. Meanwhile, 21.4% say they do not have any plans, and a further 24.4% don't know.

Figure 17. Is your library actively working on plans to shift to linked data for cataloging? —Academic libraries interested in linked data
NET YES: 54.2%
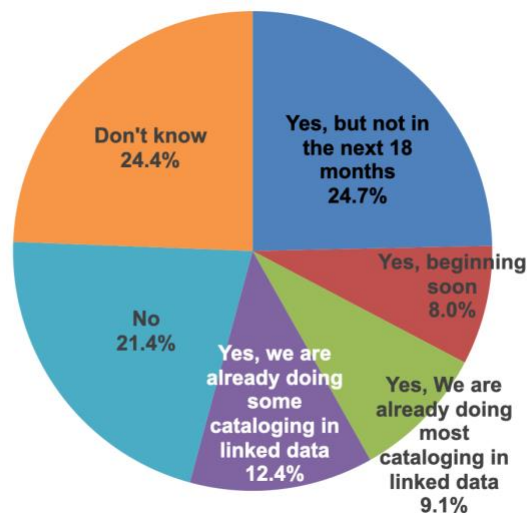
n=734

The top regions that are already doing some or most cataloging using linked data are Latin America (31.9%), followed by Europe and Oceania (both at 28.6%). Libraries in the Middle East/Africa are the most likely to have plans for linked data cataloging, be it "soon" or at some point more than 18 months out. The top regions that have no plans as yet for linked data cataloging are Europe (23.4%) and North America (23.2%).

Use of linked data for most or some cataloging increases by institution size. Doctorate and associates degree granting institutions are most likely to currently be doing cataloging in linked data..

Table 29. Is your library actively working on plans to shift to linked data for cataloging? —Academic libraries interested in linked data by region

|	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
NET YES	48.4%	65.5%	54.4%	59.7%	51.4%	73.5%
Yes, but not in the next 18 months	25.3%	25.7%	26.7%	23.4%	11.4%	29.4%
Yes, beginning soon	5.0%	8.0%	12.2%	7.8%	11.4%	29.4%
Yes, we are already doing most cataloging in linked data	5.3%	11.5%	8.9%	19.5%	14.3%	11.8%
Yes, we are already doing some cataloging in linked data	12.9%	20.4%	6.7%	9.1%	14.3%	2.9%
No	23.2%	18.6%	21.1%	23.4%	20.0%	11.8%
Don't know	28.4%	15.9%	24.4%	16.9%	28.6%	14.7%

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Table 30. Is your library actively working on plans to shift to linked data for cataloging? —Academic libraries interested in linked data by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
NET YES	48.5%	70.7%	50.0%	50.0%	45.4%	46.5%	55.2%	54.8%
Yes, but not in the next 18 months	23.0%	37.2%	21.4%	18.6%	17.9%	30.3%	40.5%	30.6%
Yes, beginning soon	8.4%	12.8%	4.3%	6.4%	4.6%	2.0%	5.2%	6.5%
Yes, we are already doing most cataloging in linked data	7.5%	14.6%	5.7%	9.0%	4.6%	4.0%	4.3%	4.8%
Yes, we are already doing some cataloging in linked data	9.6%	6.1%	18.6%	16.0%	18.4%	10.1%	5.2%	12.9%
No	26.4%	12.2%	26.4%	19.7%	22.4%	28.3%	24.1%	22.6%
Don't know	25.1%	17.1%	23.6%	30.3%	32.1%	25.3%	20.7%	22.6%

As for why libraries have no plans to move to linked data cataloging, 41.5% of libraries who had no specific plans to move to linked data cataloging (but were interested in it) said they need better tools and more knowledge, and 36.1% said they had limited capacity. Only 10.7% see no value in it.

Figure 18. What is the main reason you have not planned or moved to linked data cataloging? —Academic libraries interested in linked data but have no plans to move to linked data cataloging
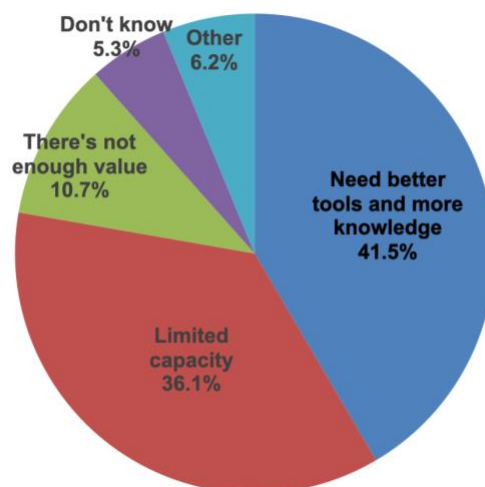
n=338

Better tools and more knowledge are barriers to linked data cataloging particularly for libraries in the Middle East/Africa (64.3%) and Latin America (58.0%). Limited capacity is an issue particularly for libraries in Oceania (45.5%), Asia (41.9%), and North America (40.2%). Lack of value is the biggest barrier for libraries in Europe (22.2%).

A need for better tools and more knowledge is more of an issue for larger libraries, while limited capacity is a bigger issue for smaller libraries.

Table 31. What is the main reason you have not planned or moved to linked data cataloging? —Academic libraries interested in linked data by region but have no plans to move to linked data cataloging

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Need better tools and more knowledge	35.9%	58.0%	48.8%	36.1%	18.2%	64.3%
Limited capacity	40.2%	22.0%	41.9%	30.6%	45.5%	21.4%
There's not enough value	8.7%	12.0%	7.0%	22.2%	18.2%	7.1%
Don't know	7.6%	4.0%	0.0%	2.8%	0.0%	7.1%
Other	7.6%	2.0%	2.3%	8.3%	18.2%	0.0%

Table 32. What is the main reason you have not planned or moved to linked data cataloging? —Academic libraries interested in linked data but have no plans to move to linked data cataloging by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Need better tools and more knowledge	41.5%	34.6%	47.8%	43.1%	38.0%	27.6%	38.7%	36.4%
Limited capacity	37.3%	39.5%	35.8%	30.6%	40.5%	48.3%	34.7%	39.4%
There's not enough value	9.3%	17.3%	7.5%	8.3%	5.1%	10.3%	13.3%	9.1%
Don't know	5.1%	2.5%	3.0%	11.1%	8.9%	6.9%	8.0%	12.1%
Other	6.8%	4.9%	6.0%	6.9%	7.6%	6.9%	5.3%	3.0%

We asked an open-ended question to get a better sense of the plans that libraries have in place for using linked data. Here is a sampling of their responses.

- Better access for users.
- Better utilization of resources.
- Cataloging research data.
- Community Zone records. Auto-holdings.
- Exploration of benefits for customers.
- Exposure of catalog data to web search engines.
- I do not have much knowledge about LLD yet, but I think that the multi-use of resources through comprehensive catalogs is a subject of continuous interest and should be able to support the advancement and specialization of librarian's job.
- In metadata and in the new ILS.
- It extends and develops the library information management system.
- It is built into our current ILS: ExLibris Alma

- It will be implemented when the vendor of our LMS implements BIBFRAME.
- OER sources, archives.
- Patron usability. We need to link our online content with various platforms (catalog, PubMed, LibGuides, etc.) so patrons can access our content as quickly as possible.
- Still evaluating whether/how to transition, assessing funding requirements.
- Use it for discovery—duh.
- Using linked data to enhance existing catalog records (e.g., via Discogs, Syndetics Unbound). Looking at additional enhancements (Wikidata, etc.)
- We are still at the initial stage of learning how to use and link data.
- You can study online.

Affordable Learning

In general, affordable learning comprises a series of initiatives that aim to reduce costs for students, particularly those associated with textbooks and other supplies. Affordable learning initiatives can involve Open Educational Resources (OER), but also include using library-licensed resources such as physical or electronic books, journals, textbooks, and other materials in lieu of having students purchase these items themselves. In some cases, affordable learning initiatives can involve the institution negotiating cheaper prices for required course materials.

In this section, we'll look at the role the academic library plays in institutions' affordable learning programs.

Affordable Learning Initiative Leaders

In general, it is the library (35.0% of respondents) or the provost office (30.1%) that is leading affordable learning initiatives in institutions of higher learning. Less often, it is the students' office (22.4%) or the faculty (20.1%). The good news is that at least it's someone; only 9.8% said their institution has no affordable learning initiatives.

Figure 19. Who is leading the affordable learning initiatives at your institution? Check all that apply.—All academic libraries
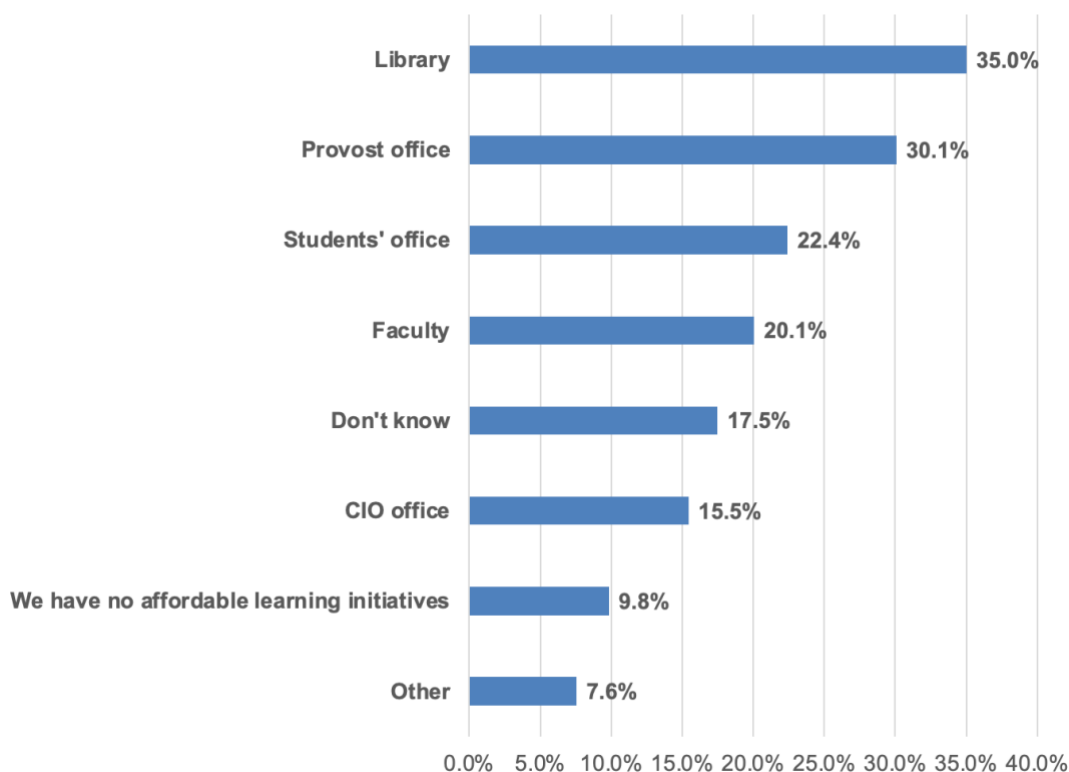
n=1,320

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When the responses for each region are ranked, the library emerges as the primary leader of affordable learning initiatives in North America (39.2%), Asia (28.9%) and Oceania (25.3%). The provost office is top-most in Latin America (38.2%). In Europe (39.0%), affordable learning tends to be the purview of the students' office. And in the Middle East/Africa, it is led primarily by the CIO office (43.4%). Institutions in Oceania (21.5%) and North America (10.5%) are the least likely to have affordable learning initiatives (they are also the two regions that are least likely to know who is leading those initiatives).

The percentage of libraries saying their institution has no affordable learning initiatives declines with increasing enrollment.

Table 33. Who is leading the affordable learning initiatives at your institution? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Library	39.2%	30.6%	28.9%	30.1%	25.3%	34.0%
Provost office	32.4%	38.2%	23.2%	16.3%	22.8%	32.1%
Students' office	16.2%	30.1%	26.1%	39.0%	20.3%	39.6%
Faculty	18.7%	30.1%	23.9%	17.1%	16.5%	9.4%
CIO office	6.6%	33.5%	20.4%	28.5%	10.1%	43.4%
Other	8.3%	11.6%	4.9%	4.1%	5.1%	1.9%
We have no affordable learning initiatives	10.5%	7.5%	8.5%	7.3%	21.5%	1.9%
Don't know	23.0%	6.4%	10.6%	12.2%	21.5%	3.8%

Table 34. Who is leading the affordable learning initiatives at your institution? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Library	31.4%	39.2%	32.0%	40.0%	39.3%	34.8%	38.2%	42.9%
Provost office	27.9%	25.5%	31.6%	37.3%	36.4%	31.2%	26.6%	37.1%
Students' office	19.7%	30.9%	19.0%	22.4%	14.9%	16.3%	21.2%	20.0%
Faculty	22.1%	19.4%	20.9%	16.9%	16.9%	12.2%	18.7%	27.9%
CIO office	19.3%	17.3%	8.7%	13.6%	4.9%	9.0%	8.3%	9.3%
Other	6.8%	6.5%	7.5%	10.2%	8.3%	9.0%	7.9%	7.1%
We have no affordable learning initiatives	14.3%	7.2%	7.1%	6.8%	7.7%	11.8%	12.9%	9.3%
Don't know	16.8%	15.1%	22.5%	15.9%	26.6%	24.9%	22.4%	17.9%

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More than one-third (36.5%) of respondents say the library is "very involved" in their institutions' affordable learning initiatives, while nearly half (48.5%) are at least "somewhat involved." Only 10.6% are not involved at all.

Figure 20. How would you describe your library's involvement in affordable learning initiatives? —All academic libraries having affordable learning initiatives
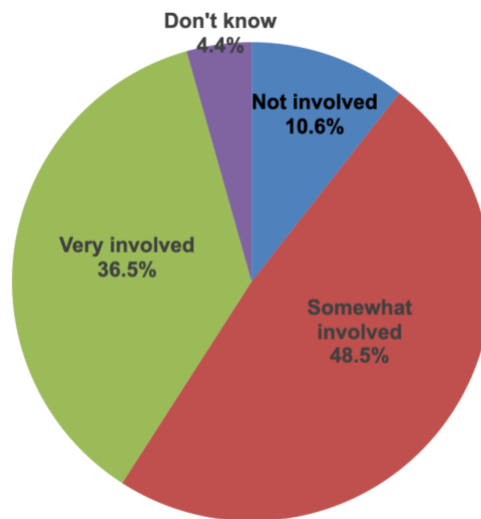
n=936

Academic libraries in Latin America and North America are most likely to be involved in their institutions' affordable learning initiatives. Libraries in Europe and the Middle East/Africa are the least involved.

Library involvement in affordable learning tends to increase, albeit slightly, as enrollment increases.

Table 35. How would you describe your library's involvement in affordable learning initiatives? —Academic libraries having affordable learning initiatives by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Not involved	8.2%	5.6%	14.2%	19.4%	13.3%	17.0%
Somewhat involved	48.9%	50.0%	49.6%	44.1%	51.1%	44.7%
Very involved	40.3%	40.1%	25.7%	34.4%	31.1%	25.5%
Don't know	2.7%	4.2%	10.6%	2.2%	4.4%	12.8%

Table 36. How would you describe your library's involvement in affordable learning initiatives? —Academic libraries having affordable learning initiatives by enrollment and degrees granted

|	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Not involved	12.2%	10.4%	11.0%	8.0%	5.3%	12.2%	9.7%	10.8%
Somewhat involved	47.7%	45.8%	54.1%	47.8%	53.5%	48.2%	49.0%	49.0%
Very involved	34.6%	42.5%	31.4%	37.9%	38.1%	36.7%	40.0%	37.3%
Don't know	5.5%	1.4%	3.5%	6.3%	3.1%	2.9%	1.3%	2.9%

Need for Affordable Learning

Do libraries feel that the need for affordable learning initiatives is becoming more acute? Overall, yes: 59.4% agree with the statement "Learning affordability is more important than it was at this time last year," with 29.5% strongly agreeing. Only 12.4% disagree and then only 4.9% strongly. Nearly one-fourth (23.9%) are neutral.

Figure 21. To what degree do you agree with the following statement: "Learning affordability is more important than it was at this time last year"? —All academic libraries
NET AGREE: 59.4%
NET DISAGREE: 12.4%
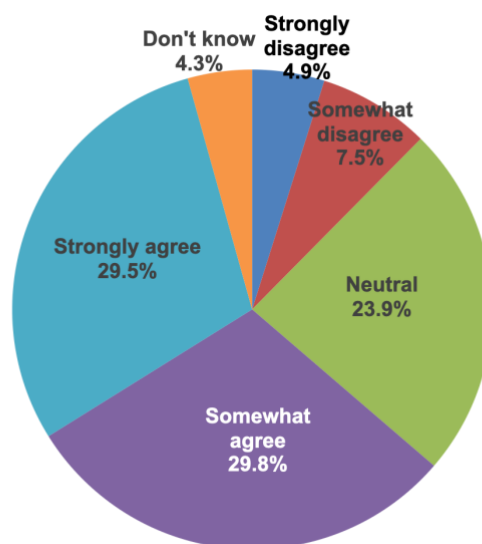
n=1,314

Academic libraries in North and Latin America (65.1% each agree) are the most likely to see that affordable learning initiatives have become more necessary, while those in the Middle East/Africa (23.1% disagree) and Europe (22.0% disagree) are the least likely. Libraries in the Middle East/Africa and Oceania are the most neutral.

Perception of the increased need for affordable learning rises very slightly as institution size increases. Institutions granting associates degrees are most likely to "strongly agree" (43.6%).

Table 37. To what degree do you agree with the following statement: "Learning affordability is more important than it was at this time last year"? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Strongly disagree	3.1%	9.9%	8.5%	5.1%	1.3%	9.6%
Somewhat disagree	6.6%	8.1%	4.2%	16.9%	2.5%	13.5%
Neutral	21.7%	13.4%	29.6%	26.3%	40.0%	46.2%
Somewhat agree	33.5%	22.7%	31.0%	25.4%	22.5%	17.3%
Strongly agree	31.6%	42.4%	21.8%	16.1%	27.5%	11.5%
Don't know	3.5%	3.5%	4.9%	10.2%	6.3%	1.9%
NET DISAGREE	9.7%	18.0%	12.7%	22.0%	3.8%	23.1%
NET AGREE	65.1%	65.1%	52.8%	41.5%	50.0%	28.8%

Table 38. To what degree do you agree with the following statement: "Learning affordability is more important than it was at this time last year"? —Academic libraries by enrollment and degrees granted

|	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Strongly disagree	5.1%	8.4%	2.8%	3.1%	2.9%	4.5%	4.6%	4.3%
Somewhat disagree	8.2%	6.9%	7.6%	7.2%	7.2%	7.7%	5.8%	5.0%
Neutral	25.9%	21.1%	23.5%	23.2%	20.6%	22.6%	23.2%	17.9%
Somewhat agree	29.2%	33.8%	26.7%	29.7%	35.2%	33.0%	36.9%	27.1%
Strongly agree	27.7%	26.9%	33.5%	31.7%	31.2%	27.6%	26.1%	43.6%
Don't know	3.9%	2.9%	6.0%	5.1%	2.9%	4.5%	3.3%	2.1%
NET DISAGREE	13.3%	15.3%	10.4%	10.2%	10.0%	12.2%	10.4%	9.3%
NET AGREE	56.9%	60.7%	60.2%	61.4%	66.5%	60.6%	63.1%	70.7%

Open Educational Resources

Although the term Open Educational Resource (OER) can mean many things, the most generally accepted definition is that coined by the William and Flora Hewlett Foundation[10]:

> Open Educational Resources are teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions.[11]

OER is seen as one type of affordable learning initiative. To what extent are academic libraries involved in OER? More than one-half (55.7%) make OER content available via the library, while 40.6% support the development of OER content at their institution, and 31.9% support OER initiatives at the state or consortium level. One-fourth (24.5%) of libraries are not involved with OER content.

Figure 22. In which of the following ways is the library involved with Open Educational Resources (OER) content? Check all that apply.—All academic libraries
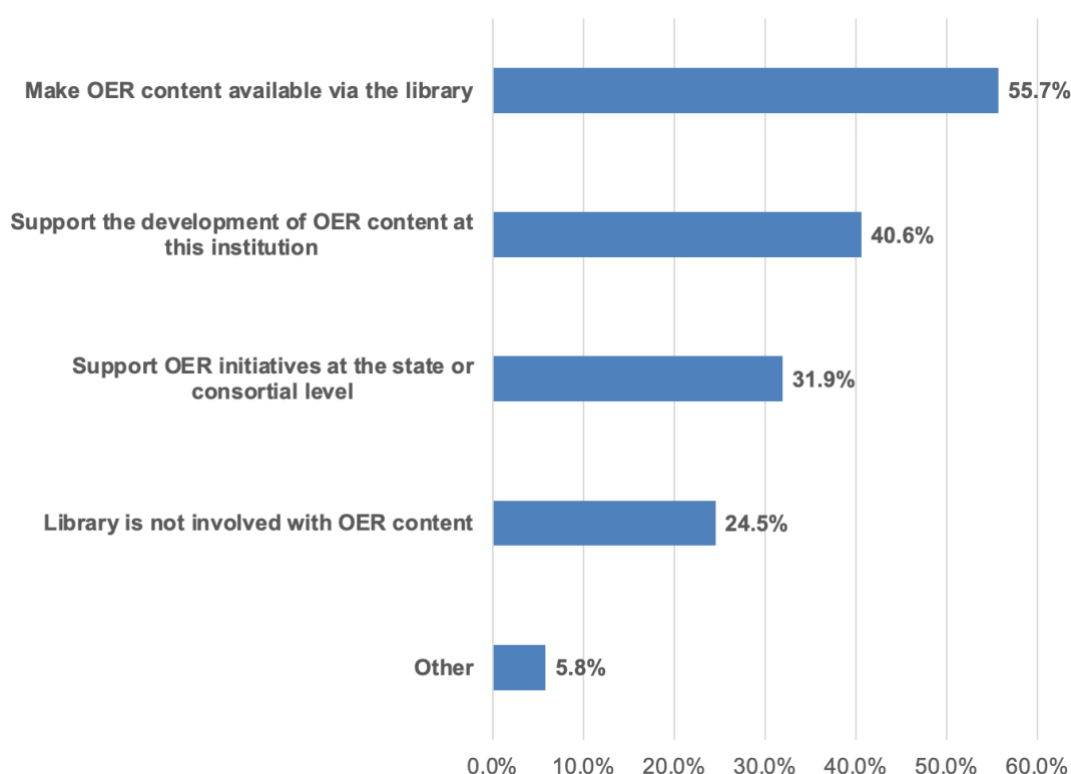
n=1,300

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[10] A private foundation that was involved in UNESCO's 2002 Forum on Open Courseware, where the term OER was first coined.

[11] See http://opencontent.org/definition/.

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Libraries in Oceania (64.6%) and North America (63.7%) are far and away the most likely to make OER content available via the library, while those in Asia (29.8%) are the least. Libraries in North America (51.5%) and Oceania (46.8%) are also the most likely to support the development of OER content. Libraries in the Middle East/Africa (15.4%) are the least.

Libraries in Latin America (35.8%), Europe (35.0%), and the Middle East/Africa (34.6%) are the least likely to be involved in OER content.

Libraries at the largest institutions (67.2%) are the most likely to make OER content available and are also the most likely (52.8%) support the development of OER content. One-third (33.3%) of libraries at the smallest institutions are not involved in OER content. Libraries serving associates degree granting institutions are most likely to make OER content available or support OER initiatives.

Table 39. In which of the following ways is the library involved with Open Educational Resources (OER) content? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Make OER content available via the library	63.7%	49.1%	29.8%	45.3%	64.6%	44.2%
Support the development of OER content at this institution	51.5%	26.6%	20.6%	24.8%	46.8%	15.4%
Support OER initiatives at the state or consortial level	39.1%	19.7%	20.6%	21.4%	27.8%	28.8%
Other	9.2%	1.7%	0.7%	2.6%	2.5%	0.0%
Library is not involved with OER content	20.8%	35.8%	18.4%	35.0%	25.3%	34.6%

Table 40. In which of the following ways is the library involved with Open Educational Resources (OER) content? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Make OER content available via the library	50.3%	55.2%	53.6%	67.2%	66.3%	62.5%	62.6%	71.4%
Support the development of OER content at this institution	32.8%	37.6%	45.6%	52.8%	56.1%	40.7%	45.8%	63.6%
Support OER initiatives at the state or consortial level	26.7%	32.6%	34.8%	37.6%	39.8%	32.9%	33.6%	50.0%
Other	4.4%	3.6%	11.2%	5.9%	12.8%	6.9%	6.7%	6.4%
Library is not involved with OER content	33.3%	21.1%	23.2%	14.1%	17.4%	23.1%	24.8%	11.4%

We asked an open-ended follow-up question to get a better sense of how libraries are involved in OER. Here is a sampling of their responses:

- Active development and assistance for OER projects, support grant writing, provide seed money.
- Added a dedicated scholarly communications librarian, who is chairing a campus wide OER committee.
- Adding OER cataloging. Recommending OER titles to readers as relevant.
- Annually, the library awards grants to faculty to adopt, adapt, or create OER.
- As the transition from print to digital continues to evolve at all levels of education, OER resources provide a wide range of resources for schools and individual educators to differentiate and extend their curriculum beyond traditional print materials.
- Assist faculty with creating and hosting open course content, provide discovery of open access, work with both consortia and state.
- Collaborate with campus partners in OER initiatives. Provide library webguide on OER.
- Consultation on resources for courses; marketing, leading effort to improve selection of course materials; reduce cost of course materials, and to improve communication to students; discovery of course materials; providing listings of OER textbooks, etc.
- Contract with publishers to support OA publishing by faculty. Champion OA publishing on campus.
- Created a LibGuide on OER to give faculty information on what it is, how to attribute use of OER content and copyright information.
- CUNY Central Office of Library Services has a robust OER Initiative (https://www.cuny.edu/libraries/open-educational-resources/) and Accessibility in OER (https://guides.cuny.edu/accessibility/). Also, Brooklyn College Library CUNY has created and supports OER (https://libguides.brooklyn.cuny.edu/oeralt).
- Digital Commons, outreach and instruction through Scholarly Communications, LibGuides/tools for discoverability, workshops during Open Access Week activities, faculty networking, Affordable Learning Georgia program, FAQs on Registrar's website.
- Educating faculty and students about OER and its value. Helping faculty find resources.
- Faculty who develop OERs come to us when they want help. Historically, our TCC Online Instructional Designers are their go-tos and we have been an afterthought.
- Financial support for author publishing fees. Librarians consult with faculty to identify OER or library-owned resources available to their students.
- Have an Affordable Learning Committee that provides education and outreach to faculty about OER content; LOUIS consortium highly active in promoting OER at various institutions and piloting OER project—our library is one of the pilot locations.
- Highlight OER where possible via discovery layer. Have attempted to encourage faculty to make materials available as OER but high aversion/low interest combined with technical difficulties make this a low priority compared to all the other challenges going on at the moment.
- Highlighting existing resources, both those created at the institution and available more generally. Supporting faculty interested in these resources.
- I am a member of the committee for the OER Initiative at my library, and we have been working for the last three years to create and administer OER grants to individual faculty

and departmental groups for either investigation of OER for their courses or programs, or implementation of OER found with or without the Library's assistance.

- Institutional repository for open-access materials and activate all relevant open-access resources in 360Core.
- Institutional version of PressBooks. Collaborating with faculty to develop OERs. Focus on including OER records in discovery layer.
- Instruction Librarians are working with Dept. of English to develop set of OER content for 2 high-enrollment, lower level English courses.
- Lead the OER textbook affordability initiatives until it was included in the larger institution retention initiatives.
- Leading discussion, professional development, learning community creation, host and support resources in the LMS and CMS.
- LibGuide links to OER content, and representative to campus committee.
- Librarians are involved in OER training and information sharing in the state consortium, and they are part of the institution's OER committee, which went on hiatus due to COVID and is still inactive.
- Librarians Partner with faculty to identify OER resources customized to individual. Courses. Provost's Office gives financial rewards to academic departments who use most OERs which sends faculty to the Library for help. Faculty are writing OER texts with librarian research help.
- Librarians work with faculty on identifying OERS to add to courses and replace/supplement textbooks. Librarians also develop LibGuides that list OERs and other library resources for classes.
- Library has increased awareness of OER resources, but their adoption must be driven by faculty—the library cannot force their use.
- Library is a member of TRAILS, which had a dedicated person for OER until this year.
- Library is trying to encourage faculty to adopt OER textbooks. We do not have the funds to support the development of OER content unfortunately, but this is hopefully something we will work toward.
- Offer training to faculty; offer incentive grants for authoring materials; offer repository and tech support to OER products; participate actively in campus collaborations to advance these initiatives.
- One librarian is OER-certified but there are multiple initiatives in place with little coordination around campus. The Digital Learning staff report through the library.
- One librarian is the chair of the Center for Teaching and Learning faculty committee and the CTL has grant monies available for creating OER. She created a LibGuide embedded in the CTL website. Another librarian is on the statewide, collaborative OER committee. Both are working on collaboratively creating OER textbooks to be used for faculty and student use.
- One of our librarians represents OER to faculty and tries to convert faculty members to use OER content for classes. Our course reserves department makes these items available via Canvas. One librarian is also involved in OER groups around the state.

- Our consortium, VIVA, provides opportunities for faculty to use OER content. We promote those initiatives to our faculty.
- Provide discovery for adopted OERs via course reserves, library catalog, etc. Work with instructional design group to identify already or easily acquired library resources that will complement OER adoptions.
- Serving on consortial committees for OER, attending training to better acquaint faculty with OER textbooks, fulfilling Provost mandate to ease financial burden on students.
- Since 2014, in cooperation with the English Department, we've been providing resources that have replaced textbooks, some OER, some database. The Library has also assisted individual faculty from other departments to do the same.
- Some OER items are included in our Library Discovery system. We also have a LibGuide which includes links to OER resources and provide information/encouragement to faculty to use OER.
- Sponsor professional development activities on OER use and development. Librarian is OER campus contact for the state initiative.
- Supported student leaders and faculty who were concerned about the cost of resources, and assisted their efforts in developing and acquiring OERs. Helped lead the development of OERs at our institution; loaded OER textbooks to our institutional depository; and continue to work with people at state level on OER initiatives.
- The Chrome extension annotates Web resources directly through the browser. Diigo is a good place to start for those who are just starting to use OER resources.
- The highest purpose of open education resources is to contribute to global knowledge sharing. In order to give full play to the potential of open education resources, it is necessary to judge how to combine the development organization of open education resources with specific practice, and to enhance the understanding of open education resources. What is the importance of sustained related efforts and actions?
- We acquired Pressbooks. Formed OER networks with other institutional libraries. Have to staff assigned to developing our OER support and performing outreach to the academy.
- We are a tiny, underfunded University. OER content is very useful to the Library due to our administration not valuing the library.
- We are bringing in guest authoritative speakers to educate faculty on OERs. We regularly reach out to individual faculty offering to help research OER for their courses. We have made a LibGuide to help faculty understand and find resources. https://kc.libguides.com/c.php?g=1133640&p=8273172
- We are champions of OER at our institution.
- We created a resource guide and link to content. We work with faculty to purchase materials for students to use in lieu of textbooks. We do not catalog OER and there is no unified OER initiative at this institution.
- We encourage faculty to use OER content for their course readings. We have implemented Ares e-reserves system in the recent past. We also have institutional repository for faculty to provide their content creation.

- We encourage OER initiatives, but it does not seem to be a top priority for college administration. Since faculty do what they are asked by administration, support needs to be from top down. We can yammer all we want and set up meetings all we want, but the Math department is going to continue using the publisher's system because it is easy for them to use.
- We facilitate the adoption grants, professional development, and outreach. We are looking to expand into facilitating full textbook publishing.
- We have a Scholarly Communications librarian who works heavily with OER—in creating awareness, promoting usage and working with consortial colleagues.
- We have a team that has started to work with faculty (especially those that teach first year students) to get them to adopt open source textbooks. We are also possibly considering an open source ILS system.
- We have a textbook rental program at the university and that area is part of the library. We work with instructors on textbook adoption and help them explore OER options when appropriate.
- We have facilitated OER publishing by initiating a program involving faculty and special collections/archives staff.
- We have had little to zero support from admin to incentivize faculty buy-in to OER reuse and revision.
- We have the beginnings of an OER program within our library, but it feels like a side-project rather than a main initiative. There are many who want to advance it into the "main initiative" arena, but we do not have the ability/funding to do so at the moment.
- We lead the textbook affordability initiatives on this campus with our staff involvement but also we are the only unit that provides funding for OER adoption (via faculty incentives) and policy development as well as publishing open textbooks.
- We offer $500 OER awards to faculty to help encourage them to develop OERs—it's a competitive award (more applicants than money available). We offer the option to make OERs available through our institutional repository.
- We participate in regional and state groups, such as the Houston Area OER Consortium and the Texas Digital Library (TDL) OER group. We make OER content available via the library, through efforts such as maintaining a detailed research guide linking to OER by department and course, and promotion and support for OER through our subject liaison librarians. We support the development of OER content as well, though this is only a fledgling pursuit on our campus at this time; so far adoption has been far more common than creation.
- We post links to OER content but do very little to really encourage and support their use. Faculty are stubborn and do not consider the cost to students in selecting their course materials.
- We supply OER grants to faculty from our budget so that they can develop open textbooks and other open resources. We guide faculty to finding already existing open resources that are relevant.

- We support faculty who seek to adopt OER for the course(s). We offer a platform for OER discovery (EBSCO's Faculty Select). Assist/collaborate with faculty in grant applications for OER initiatives. Offer workshops on OER.
- We've partnered with BibliU to provide more digital textbook access and bought more digital textbooks licenses.
- With the growing availability of OERs, course instructors can potentially find appropriate texts that meet course objectives and may be able to substitute pricey texts for these open license textbooks available at no cost to students.
- Work with our University's OER Curator to provide curriculum aligned library and web materials to supplement or replace costly course textbooks.

Adaptation to Evolving Needs

One thing that libraries have learned over the past decade is that institution and user needs invariably change. This was perhaps demonstrated most vividly during COVID, but long before the pandemic, academic institutions were supporting increased distance learning and remote access by balancing the acquisition of physical and electronic media, not to mention constantly evolving technology. So, do academic libraries expect that their approach to supporting course materials will change as needs evolve?

More than one-half (54.8%) expect there to be some change, 22.2% significant, 32.6% minor. One-fourth 25.3% expect no change—suggesting their approach works in all weathers.

Figure 23. Do you expect the library's approach to supporting course materials will change due to evolving needs? —All academic libraries
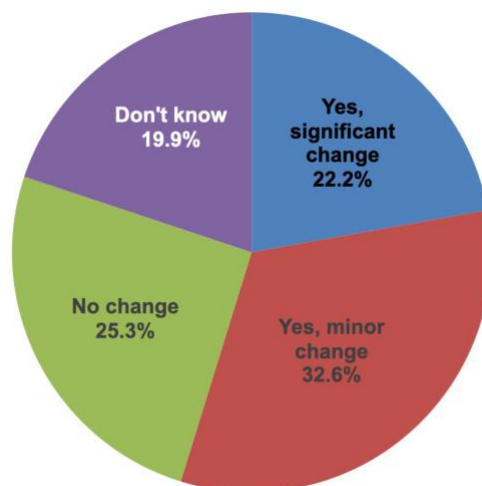
n=1,307

Libraries in Latin America (61.4%) and North America (58.5%) are the most likely to expect to change their approach, while those in the Middle East/Africa (35.3%) and Asia (47.1%) are the least likely.

Expectations of a change in approach increase slightly with increasing institution size—more students mean a more heterogeneous population and a greater need to adapt to changes.

Table 41. Do you expect the library's approach to supporting course materials will change due to evolving needs? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
NET YES	58.5%	61.4%	47.1%	39.7%	52.5%	35.3%
Yes, significant change	20.7%	34.5%	23.6%	16.5%	22.5%	9.8%
Yes, minor change	37.8%	26.9%	23.6%	23.1%	30.0%	25.5%
No change	22.4%	20.5%	34.3%	34.7%	26.3%	39.2%
Don't know	19.1%	18.1%	18.6%	25.6%	21.3%	25.5%

Table 42. Do you expect the library's approach to supporting course materials will change due to evolving needs? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
NET YES	52.1%	52.9%	53.6%	62.3%	63.0%	54.8%	53.8%	62.1%
Yes, significant change	18.1%	24.3%	23.8%	25.3%	21.4%	21.0%	20.0%	27.9%
Yes, minor change	34.0%	28.6%	29.8%	37.0%	41.6%	33.8%	33.8%	34.3%
No change	27.1%	30.1%	23.0%	20.2%	17.3%	22.4%	29.2%	22.1%
Don't know	20.8%	17.0%	23.4%	17.5%	19.7%	22.8%	17.1%	15.7%

Specific Changes

As for what those specific changes are likely to be, we asked two open-ended questions: what are the most important changes expected in the next 18 months, and what do respondents predict will be the most important long-term changes (beyond 2022)?

Short-Term Changes

Here is a sampling of the write-in responses to the question of what important changes they see in the next 18 months. The top responses revolved around "more electronic and fewer print resources," "more adoption/providing of OER," "more etextbooks," and "greater emphasis on remote learning/access."

- Access to textbooks for students who can't afford them.
- Accessibility and affordability.
- Acquire more ebooks with unlimited seating capacity.
- Adding Virtual Data.
- Affordable learning resources.
- Awareness among faculty.

- Become involved in OER on campus.
- Budget constraints reducing our physical and digital resources.
- Building a textbook reserve collection and OER initiatives with faculty for building syllabus around OER materials.
- Changing from print to electronic resources.
- Continue to decrease physical material acquisition in favor of electronic (we've already been shifting this way for years, so I see this as minor for us).
- Continuing Covid-based shift from print to electronic eReserves.
- Continuing our efforts around OER and Transformative Agreements.
- Course type (transition to remote education).
- Creating and finding video course materials for distance learning.
- Ebooks through group purchasing are expected to be used as textbook rather than published one. Budget should be available though.
- Embedding library guides into course pages. Embedding more readings into course pages as part of integration with LMS. Ensuring copyright compliance and more flexible and open access for electronic resources.
- Exploring entire spectrum of textbook and course support; students don't expect to pay; licensing is huge challenge at institutional level as is cost.
- Facilities changes. Increasing electronic access. Digitization. Finding more ways to make sure students get the resources they need.
- Faculty are requesting online video content which is extremely expensive and out of budget range at this time. Likely to be investigating this further and adjusting budget numbers accordingly to make that work.
- Falling enrollment will drive our budget down.
- Finding permanent funding to support digital textbook collections.
- Funding for library to purchase electronic textbooks and OER materials.
- Get more eBooks and less print.
- Getting faculty on board to understand the importance and how we can assist them in making use of existing resources we offer.
- Gradual movement away from hard copy reserves.
- Greater availability of OERs.
- Greater flexibility and operability in multiple, concurrent academic calendars, e.g. short courses, two semester, three semester models; improved accessibility for students with special needs.
- I think the library will become the first place faculty look for course materials, and will help fund library purchase of the materials.
- If the changes continue at the pace they have over the last 15 months, the move to providing more online resources will continue—whether this is providing more of our books as e; subscribing to more etextbooks or journals or creating more online teaching resources.
- Increased use of library-owned materials and OER.

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- Learning how to adapt to new normal and student needs - facing the unknown future and what will need to be changed.
- Materials would be delivered in electronic format in higher and higher proportion.
- More electronic materials, fewer physical ones, more weeding of redundant physical materials, shifting curriculum for new programs. Supporting international students (e.g. people behind the Great Firewall).
- More long-distance and foreign students, some of whom can't purchase or access digital materials with the same ease as domestic students.
- More of a proactive approach to outreach with not only the faculty, but the students as far as their needs when it comes to OER and affordability. Also, a concerted effort to raise the visibility of the Library's OER initiative.
- Moving to Leganto allows us to manage course reserves more efficiently. Slow move away from print course reserves has been accelerated due to COVID and remote services.
- Our library has had to fight to be included in the OER initiatives at our college (we were originally marginalized/excluded by administration). We have finally been approved by the Provost's offices to play a significant role in encouraging the broad adoption of OER course texts and materials, and we expect to pursue that work in the coming year.
- Print reserves have all but been eliminated during COVID, but faculty is slow to understand or accept this change. As print materials are withdrawn from the reserves collection, faculty are being presented with OER or unlimited-access library materials options where feasible.
- Print reserves will probably disappear completely—any book would have to become an e-resource instead with unlimited simultaneous users.
- Restructuring of library as learning commons and staff to support new initiatives.
- Return to campus and adjustment to maintaining dual remote and in-person experience.
- Return to physical reserves after COVID.
- Returning to print course reserves. Replacing course reserve-needed print books that have not been returned by remote readers (and new alumni!).
- Shift from DVD to online streaming, more ebook use, more laptops for student checkout.
- support of students online—even with the pandemic wrapping up, it's made us realize the importance of providing services remotely.
- The development of a hybrid approach to providing course materials. One that includes both digital and in person transactions. Currently (due to the pandemic) we are all digital. But prior to the pandemic we were all in person. I suspect that as we return to in person in the fall we will need to provide more physical resources then we have been, but the convenience of digital means that we will likely also have to come up with a hybrid approach that serves both simultaneously.
- The library no longer purchases available print textbooks. We purchased Leganto and are trying to involve faculty in using library purchased materials and OERs as alternatives.
- The library shift from 50% print and 50% digital to 15% print and 85% digital or online materials.

- We already made a change. We created the Planning for Equitable Access program to help faculty choose materials that are Open Access or that the library can buy and/or make available to our students.

Long-Term Changes

Respondents cited many of the same things as in the "short-term" question—OER/OA will become more prevalent, print collections will virtually disappear as more, if not all, resources become available electronically, staffing level changesleaving remaining staff with more responsibilities, and concerns over budget uncertainty. Here is a sampling of some of the common and not so common responses.

- 80% digital and 20% print.
- A change in paradigm—how much teaching will be now coaching instead? Will students be able to learn and find resources by themselves? How much will be now research?
- A stronger shift in development and budgeting to make the acquisitions of course materials (textbooks, etc.) a priority.
- Accessibility vs. authority. Will students accept cheaper, less reliable sources, rather than pay for top of the line resources?
- Adoption and adaption of OER and library preservation and hosting of OER and affordable course materials.
- Affordable high-quality resources.
- Almost complete digital shift.
- Being relevant to campus; customization of services; maintaining collection strength; new modes of scholarly communication and having more transformative agreements for OA publishing.
- Budget cuts have long-term impacts. The wave of retirements and the lack of raises last year, and the "do more with less" mentality that libraries have been working with for decades, are eroding our workforce. Talented people leave the field every day because of these issues (along with DEI issues like racism, sexism, etc., in the library field). As our pool of staff shrinks, our ability to prove our value to our parent institutions drops. Vendors that previously saw themselves as working in the library space are already starting to target universities as customers, at the expense of university libraries. Publishers continue to gouge academic institutions because they can. All of these issues grow worse as the pool of talented and dedicated library workers gets smaller—when we try to "do more with less," we end up instead doing less, and over the long term, spending more. The failure to invest in human capital (for example through professional development, compensation improvements, DEI efforts, and flexible work schedules) will continue to eat away at the importance of academic librarianship to the institutions we serve.
- Change in structure to adapt to changes in learning—hybrid, virtual, in person—more electronic resources used, necessity to develop plans that allow fast pivots how instruction is provided, student needs.
- Climate change.

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- Continued funding as instructors upgrade textbook editions frequently.
- Continued investment in the online library which will facilitate "learning from anywhere" for registered students.
- Continued lack of funding, materials, equipment and staff with demands to do more such as OERs, EDI initiatives.
- Continued long term enrollment declines as high schools cut out more and more of the first two years of college (high schools providing General Education via dual credit). This will cause significant budget cuts and possibly institutional financial failure in, oh, 7 to 10 years.
- Continuing to provide student support with a smaller budget and reduced staffing. We are barely hanging on as it is, so change will have to include a reduction of content and service elsewhere. This will likely mean reduced support for faculty research materials (no more big Abstract and Indexing databases). We will likely eliminate subscriptions to citation managers, print journals, and other individual journal subscriptions.
- Definitely more budget cuts will affect our materials acquisitions and our ability to support college programs.
- Digitalization, more 24/7 access points (pick up lockers, etc.).
- Electronic resources and resource sharing will increase.
- Eventually it will be learned that online resources are shallow and incoherent.
- Faculty and student desire for digital content (what they have had access to during the pandemic is not going to go away—they will have an expectation that the access we've provided in the past 16 months will continue).
- Faculty will become more interested in delivering course materials in innovative ways, such as through VR.
- Fewer students attending college and institutions starting new, highly specialized degree programs that cost more money to support.
- For us, a more traditional book-based academic library, having been led for three decades by the same library director whose discipline and personal bias tended towards acquisition of print materials...we will be shifting towards electronic resources in consultation with faculty, and with a nuanced approach regarding differences in program/discipline needs.
- Huge reduction in printed collection and move more and more budgets towards electronic copies.
- I expect we will host a lot more OER. I teach one class with no textbook fees and another class that I have halved the textbook fees for.
- I suspect there will be more online learning. I'm actually not all that happy about this.
- I think the library should plan how it can give the changing Alpha Generation various and interesting experiences through infrastructure and content and proceed with a quick execution.
- In order to truly support equity, colleges will increasingly provide textbooks at no cost to students. OER will become even more essential. Sharing a textbook in the library is not equity.

- Less physical materials. Yet, this is somewhat dangerous in my opinion. There could be a lengthy cyberattack that makes physical materials more important and accessible.
- Long term, I think we will try and be more flexible with patrons, with library staff, and policies. We also want to make our services more accessible for remote students since we have the practice.
- More emphasis on the library as a collaborative space, integration of tutoring services in library space
- More students are enrolling because jobs are scarce. However, that means that resources, staffing, etc., are still thin and that doesn't equate to more funds. A change to learning remotely—people will be insular, society will change.
- OERs will be the main driver, along with OA, although I'm not at all sure how much those will ease the student burden in the end. The core issue goes well beyond what library support can do, and it requires deeper involvement at the organizational level. But I don't see any real commitment there at the moment, just occasional small amounts of discrete funding and vague assurances that it's being taken seriously.
- People are more comfortable with ebooks. Once they are fully accepted (or now, lol) they should be the default for ILL. ILL offices are now seeing the vast benefits of ebooks and should, I hope, start negotiating lending rights. This will save hugely on shipping and radically degrease, of course, the delivery times. CDL might become more widely implemented. This may also have wide effects on consortia.
- Spending on digital resources will far exceed print; OER resources will replaces textbooks in many courses; remote learning and hybrid courses will increase.
- The library needs to produce reliable, accessible, diverse sources in a modern and clear way. These can be not only regular topic lists, but also a search through the usual means of communication for students, e.g. social networks or knowledge maps. I don't know how this can work, but library resources need to be close to the user.
- We have very few staff left after a significant pandemic related budget cut. I'm not sure that there is anyone that has the capacity to do more than what we are currently doing. So I would say that we need more staff.
- Younger/newer faculty have been more willing to try OER or library-accessible materials in their courses, and as older faculty retire we expect a cultural shift toward affordable & accessible learning materials as the norm.

Resource Sharing

Resource sharing means making the collections of one library available to the users of another library. Practices like interlibrary loan have been around for decades, but modern library resource sharing can be applied to technical capabilities, staff skills and knowledge, discovery tools, collection management, and other library resources. This section looks at attitudes and prevalence of resource sharing among academic libraries.

Interest in Resource Sharing of Course Materials

Nearly one-half (47.5%) of academic libraries said they would consider resource sharing for course materials, while 29.8% said "maybe." Only 8.2% would not be interested. Many libraries appear to be on the fence about resource sharing; perhaps they get what they need via their consortia (those that are part of one) or perhaps they are unaware of what resources can be shared. At the same time, course materials could be highly customized for individual faculty/classes and might not be seen as "portable"—although not all course materials need to be course- or instructor-specific.

Figure 24. Would you consider resource sharing for course materials? —All academic libraries
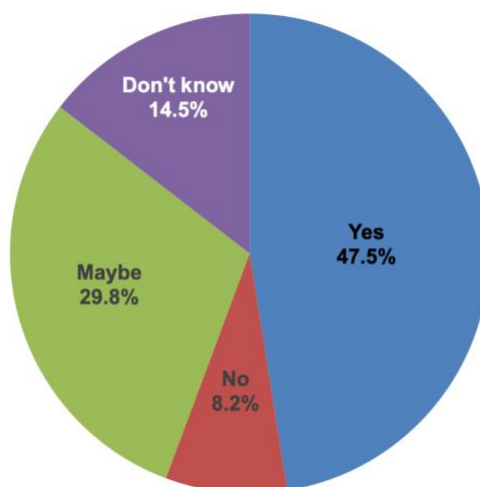
n=1,293

Academic libraries in Asia (62.9%) and Latin America (60.8%) are the most interested in resource sharing for course materials. Libraries in Oceania (12.5% said "no") and Europe (10.0% said "no") are the least interested in resource sharing.

Libraries at small to mid-size institutions (5,000 to 9,999 enrollment) are the most interested in resource sharing (52.0% said "yes"), and at the same time least interested (11.1% said "no").

Table 43. Would you consider resource sharing for course materials? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Yes	41.7%	60.8%	62.9%	46.7%	48.8%	41.2%
No	8.3%	7.8%	4.3%	10.0%	12.5%	7.8%
Maybe	31.9%	22.3%	25.7%	32.5%	22.5%	41.2%
Don't know	18.1%	9.0%	7.1%	10.8%	16.3%	9.8%

Table 44. Would you consider resource sharing for course materials? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Yes	43.8%	52.0%	46.4%	50.4%	38.9%	40.6%	45.6%	46.8%
No	7.1%	11.1%	7.1%	8.1%	6.1%	8.2%	9.7%	10.8%
Maybe	34.9%	26.2%	25.8%	28.2%	32.5%	31.1%	31.6%	30.2%
Don't know	14.2%	10.7%	20.6%	13.4%	22.5%	20.1%	13.1%	12.2%

Interlibrary Loans

One of the oldest forms of resource sharing is interlibrary loans (ILL). What ILL-related challenges do academic libraries face? What tools do they use to facilitate ILL?

Challenges

The top challenge for libraries related to interlibrary loan are the costs related to borrowing activities, cited by 32.1% of respondents.[12] Another 31.7% cited turnaround time for borrowing request fulfillment by partner lenders, while 28.0% cited administrative effort to fulfill ILL requests to borrow, and 25.4% cited administrative effort to fulfill incoming ILL requests to lend. Still, 21.0% said none of the above. The fact that the percentages add to considerably more than 100.0% suggests that libraries reporting challenges with ILL are experiencing them on multiple levels.

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[12] ILLs are often free, if participating libraries have agreements in place. If they don't, the lending library can charge a fee. And for journal articles, there can also be a copyright fee.

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Figure 25. Which, if any, of the following interlibrary loan-related activities pose significant challenges for your library? Check all that apply.—All academic libraries

Activity	Percentage
Costs related to borrowing activities	32.1%
Turnaround time for borrowing request fulfillment by partner lenders	31.7%
Administrative effort to fulfill incoming ILL requests to borrow	28.0%
Managing consortial-level resource sharing initiatives	27.4%
Administrative effort to fulfill incoming ILL requests to lend	25.4%
The imbalance of our ILL borrowing vs. our lending	21.3%
None of the above	21.0%
Other	7.9%
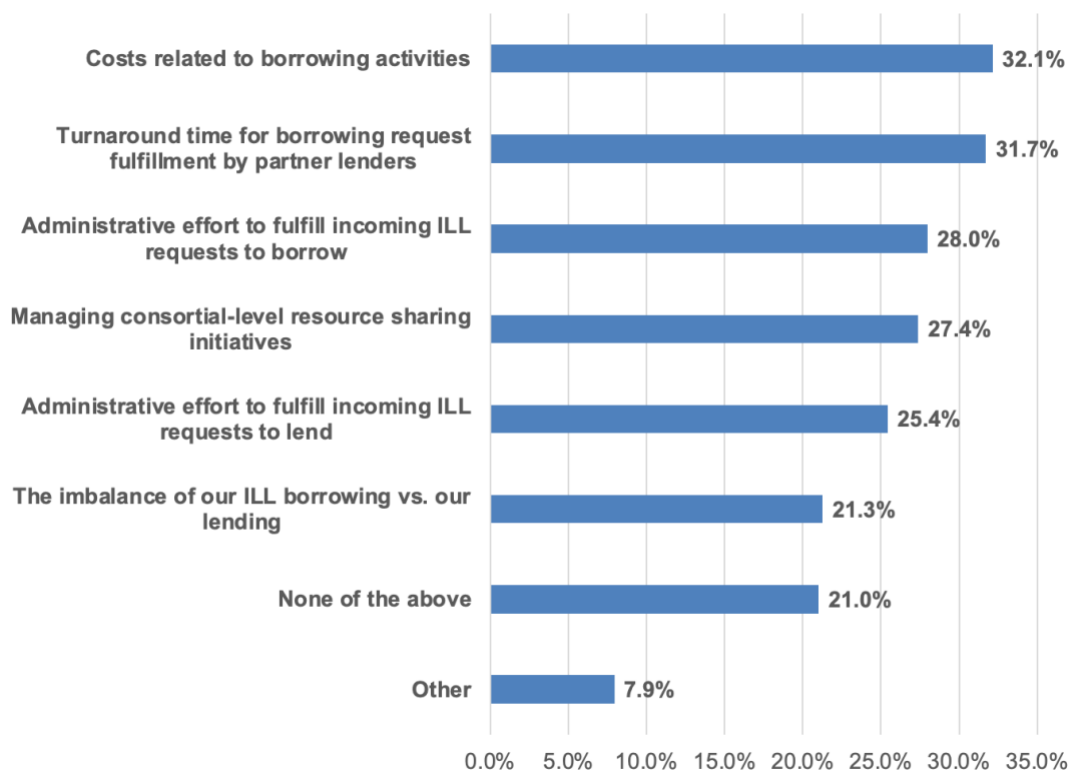
n=1,223

The top ILL-related challenge for libraries in Asia (50.5%) and Latin America (47.0%) is managing consortial-level resource sharing initiatives. In the Middle East/Africa, it is administrative effort to fulfill incoming ILL requests to borrow (52.9%). In Europe, it is turnaround time for borrowing request fulfillment by partner lenders (44.5%). In North America and Oceania, the top-cited ILL challenge is cost.

For smaller libraries, the top ILL challenge is turnaround time for borrowing request fulfillment by partner lenders, while for larger libraries it is costs related to borrowing activities.

Table 45. Which, if any, of the following interlibrary loan-related activities pose significant challenges for your library? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Costs related to borrowing activities	33.0%	30.1%	41.6%	24.4%	27.8%	33.3%
Turnaround time for borrowing request fulfillment by partner lenders	24.7%	42.8%	43.6%	44.5%	25.3%	47.1%
Administrative effort to fulfill incoming ILL requests to borrow	20.8%	43.4%	40.6%	29.4%	26.6%	52.9%
Managing consortial-level resource sharing initiatives	22.0%	47.0%	50.5%	20.2%	17.7%	27.5%
Administrative effort to fulfill incoming ILL requests to lend	18.7%	33.1%	34.7%	40.3%	21.5%	43.1%
The imbalance of our ILL borrowing vs. our lending	23.4%	16.3%	32.7%	13.4%	17.7%	7.8%
Other	10.6%	3.6%	2.0%	4.2%	12.7%	0.0%
None of the above	28.5%	12.7%	5.0%	6.7%	26.6%	3.9%

Table 46. Which, if any, of the following interlibrary loan-related activities pose significant challenges for your library? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctorate	Master's	Baccalaureate	Associates
Costs related to borrowing activities	27.0%	36.6%	35.0%	34.0%	36.8%	33.2%	32.1%	29.4%
Turnaround time for borrowing request fulfillment by partner lenders	33.1%	37.0%	29.1%	26.3%	19.8%	26.2%	32.1%	29.4%
Administrative effort to fulfill incoming ILL requests to borrow	30.5%	27.9%	23.2%	28.2%	19.5%	27.6%	23.9%	20.6%
Managing consortial-level resource sharing initiatives	23.5%	27.5%	28.3%	32.8%	23.2%	20.1%	23.1%	15.4%
Administrative effort to fulfill incoming ILL requests to lend	23.7%	27.9%	22.4%	29.0%	18.6%	24.8%	24.4%	22.1%
The imbalance of our ILL borrowing vs. our lending	21.1%	22.1%	23.6%	18.1%	22.0%	26.6%	25.2%	18.4%
Other	7.2%	5.0%	9.7%	10.8%	13.0%	9.3%	9.4%	11.8%
None of the above	23.3%	17.6%	22.8%	18.9%	29.1%	26.6%	23.1%	27.2%

Tools

The top product or tool used for processing interlibrary loans is basic consortial resource sharing, selected by 47.6% of academic libraries. That is followed by ILLiad (32.1%) and Ex Libris' RapidILL (22.8%).

"Other" was selected by 20.4%. Common write-in responses were:

- OCLC WorldShare
- Docline
- Manual processes (email, telephone)

RelaisILL and Clio find favor in academic libraries in the Middle East/Africa, even more than consortial resource sharing. The top answer for all other regions is consortial resource sharing, although ILLiad approaches its percentage in North American libraries (48.4%), Reshare is only two points lower in European libraries (26.5%), and RapidILL is four points lower in Oceania (35.6%). Few Latin American and Asian libraries use ILL tools other than consortial resource sharing.

Libraries at doctorate-granting institutions in North America prefer ILLiad (65.6%) far more than consortial resource sharing (49.4%).

Table 47. What are your primary interlibrary loan tools? Check all that apply.—Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Consortial resource sharing	52.3%	50.3%	46.6%	28.2%	39.7%	31.4%
ILLiad	48.4%	4.7%	8.2%	9.4%	2.7%	13.7%
RapidILL	24.6%	9.4%	19.2%	23.1%	35.6%	25.5%
RelaisIll	6.8%	12.8%	17.8%	25.6%	23.3%	39.2%
Clio	7.9%	14.8%	12.3%	22.2%	8.2%	37.3%
Reshare	8.3%	10.7%	15.1%	26.5%	6.8%	29.4%
Rapido	5.2%	14.1%	15.1%	20.5%	5.5%	29.4%
Tipasa	11.7%	0.0%	1.4%	4.3%	11.0%	0.0%
Other	18.0%	29.5%	20.5%	23.1%	34.2%	3.9%

Table 48. What are your primary interlibrary loan tools? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Consortial resource sharing	49.9%	42.9%	44.6%	50.4%	49.4%	50.2%	52.6%	54.9%
ILLiad	20.2%	31.2%	45.5%	42.2%	65.6%	43.6%	39.1%	26.3%
RapidILL	16.6%	19.0%	28.1%	32.8%	33.2%	22.7%	24.3%	9.8%
RelaisIll	13.4%	15.8%	5.8%	14.8%	7.5%	6.2%	7.4%	5.3%
Clio	13.2%	17.8%	6.7%	8.2%	4.2%	10.9%	11.3%	10.5%
Reshare	9.8%	17.4%	9.4%	11.7%	6.6%	10.9%	10.9%	11.3%
Rapido	8.4%	16.2%	8.0%	7.4%	3.0%	7.6%	8.3%	6.8%
Tipasa	7.5%	12.1%	8.0%	5.9%	9.3%	17.5%	12.6%	5.3%
Other	27.9%	12.6%	18.3%	16.4%	13.5%	19.4%	20.4%	27.1%

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Research and the Library

How does an academic library support faculty research? The overwhelming response is "provide access to scholarly sources," selected by 81.3% of responses. A distant number two is "provide access to non-scholarly varied content sources" (55.7%), "provide citation management software" (47.7%), and "deposit publications or datasets to an institutional research repository" (42.8%).

Figure 26. In which of the following ways does your library support faculty research? Check all that apply.— All academic libraries

Category	Percentage
Provide access to scholarly sources	81.3%
Provide access to non-scholarly varied content sources	55.7%
Provide citation management software	47.7%
Deposit publications or datasets to an institutional research repository	42.8%
Find relevant journals for publication	34.2%
Support faculty profiles	30.5%
Provide metadata support	29.1%
Manage article processing charges	26.1%
Monitor the impact of faculty research	21.5%
Ensure compliance with Open Access policies	20.0%
Access to research funding databases	19.3%
Prepare data management plans	19.3%
Monitor the impact of research conducted in the library	13.8%
Submit research for publication	10.7%
Other	4.3%
None of the above	2.0%

n=1,230

Significant variations exist in how libraries support faculty by region. The top three for each region are listed below:

- **North America:** Provide access to scholarly sources (92.1%), provide access to non-scholarly varied content sources (64.0%), and provide citation management software (47.9%).
- **Latin America:** Provide access to scholarly sources (72.3%), deposit publications or datasets to an institutional resource repository (55.4%), and provide citation management software (43.4%).
- **Asia:** Provide access to scholarly sources (73.1%), find relevant journals for publication (56.4%), and provide access to non-scholarly varied content sources (43.6%).

- **Europe:** Provide access to scholarly sources (49.6%), provide citation management software (44.6%), and find relevant journals for publication (42.1%).
- **Australia/New Zealand:** Provide access to scholarly sources (90.0%), provide citation management software (71.3%), and deposit publications or datasets to an institutional resource repository (63.8%).
- **Middle East/Africa:** Find relevant journals for publication (44.9%), manage article processing charges (44.9%), and deposit publications or datasets to an institutional resource repository tied with support faculty profiles (both at 40.8%).

Table 49. In which of the following ways does your library support faculty research? Check all that apply.— Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Provide access to scholarly sources	92.1%	72.3%	73.1%	49.6%	90.0%	32.7%
Provide access to non-scholarly varied content sources	64.0%	42.2%	43.6%	40.5%	60.0%	32.7%
Provide citation management software	47.9%	43.4%	41.0%	44.6%	71.3%	38.8%
Deposit publications or datasets to an institutional research repository	40.3%	55.4%	24.4%	40.5%	63.8%	40.8%
Find relevant journals for publication	29.0%	36.7%	56.4%	42.1%	37.5%	44.9%
Support faculty profiles	24.7%	41.0%	28.2%	34.7%	51.3%	40.8%
Provide metadata support	26.6%	30.7%	29.5%	34.7%	47.5%	16.3%
Manage article processing charges	22.5%	27.1%	24.4%	40.5%	26.3%	44.9%
Monitor the impact of faculty research	15.8%	29.5%	25.6%	31.4%	31.3%	32.7%
Ensure compliance with Open Access policies	17.7%	24.7%	23.1%	24.0%	33.8%	4.1%
Prepare data management plans	18.2%	17.5%	21.8%	22.3%	22.5%	22.4%
Access to research funding databases	19.6%	16.3%	23.1%	21.5%	17.5%	18.4%
Monitor the impact of research conducted in the library	12.3%	19.9%	20.5%	14.9%	12.5%	6.1%
Submit research for publication	10.4%	9.0%	10.3%	13.2%	13.8%	12.2%
Other	4.8%	4.8%	0.0%	0.0%	11.3%	2.0%
None of the above	1.9%	3.0%	2.6%	2.5%	0.0%	2.0%

The larger the institution, the more faculty support is offered by the library. Libraries at the largest institutions (20,000+ enrollment) selected every method of supporting faculty research more often than average.

Table 50. In which of the following ways does your library support faculty research? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Provide access to scholarly sources	80.8%	66.8%	90.2%	88.4%	97.4%	92.7%	88.6%	79.9%
Provide access to non-scholarly varied content sources	55.8%	46.5%	58.7%	61.9%	70.1%	61.0%	64.0%	54.0%
Provide citation management software	38.6%	40.6%	57.0%	62.3%	63.0%	40.8%	46.6%	23.7%
Deposit publications or datasets to an institutional research repository	28.2%	40.6%	51.5%	62.7%	58.1%	33.9%	33.9%	16.5%
Find relevant journals for publication	28.2%	26.2%	40.0%	47.4%	39.6%	26.1%	28.4%	15.8%
Support faculty profiles	23.5%	27.7%	37.9%	39.2%	35.5%	19.3%	20.8%	10.8%
Provide metadata support	18.8%	27.0%	34.0%	45.1%	36.4%	24.3%	19.9%	9.4%
Manage article processing charges	22.8%	28.9%	23.8%	30.6%	26.4%	20.6%	20.8%	12.9%
Monitor the impact of faculty research	17.5%	21.5%	22.1%	27.6%	20.2%	11.9%	13.1%	14.4%
Ensure compliance with Open Access policies	12.3%	16.0%	25.1%	32.8%	24.9%	14.2%	14.8%	10.8%
Prepare data management plans	12.1%	15.2%	17.9%	36.9%	25.5%	9.6%	14.4%	7.2%
Access to research funding databases	12.7%	18.8%	20.4%	29.9%	29.9%	19.7%	16.5%	6.5%
Monitor the impact of research conducted in the library	9.3%	12.5%	14.9%	21.6%	14.1%	9.6%	10.2%	13.7%
Submit research for publication	6.5%	10.2%	13.2%	16.8%	14.1%	9.2%	8.5%	5.0%
Other	4.3%	3.9%	3.8%	5.2%	4.4%	6.0%	3.4%	4.3%
None of the above	3.0%	0.8%	1.7%	1.5%	0.6%	0.5%	1.3%	6.5%

Conclusions and Recommendations

What is the state of academic libraries as we emerge from the pandemic? As we have seen in many other industries and parts of our culture, the pandemic exacerbated and accelerated trends that have been impacting libraries throughout the past decade.

Budget is an ongoing concern. While some institutions are experiencing increased enrollment, such as Historically Black Colleges and Universities[13] and highly ranked public universities[14] in the United States, universities in the United Kingdom[15], and institutions in the Netherlands[16], and others[17] are experiencing enrollment declines. Less money coming into the university means budgets everywhere will be cut. Whether these enrollment declines are temporary and will bounce back post-COVID remains to be seen. For the time being, the impact on budgets will drive libraries to rely on time-tested strategies, like shifting funds from less important or popular resources to those that are more important. At present, this means taking money from print and other physical resources and shifting it to electronic resources, whether that means buying more digital-only materials or digitizing print materials.

Cataloging can be a big expense for libraries, and respondents to this survey seem to be on the fence about whether they can look for cuts in cataloging budgets. A fair number of libraries have investigated and pursued potential catalog cost-reduction measures such as Library Linked Data, many more are still in the exploratory phase.

Indeed, as we saw in the telling "budget windfall" question, if libraries suddenly received a magical 25 percent increase in their budget, the top "goodies" it would be spent on were electronic resources, digitization, and additional staff. In the equally telling "top significant challenges" question, key issues for academic libraries are budget limitations, staff shortages, and ineffective communication with faculty—perennial challenges for academic libraries that have become more acute with the pandemic.

The primary reason for the increase in electronic resources is the expectation that the pandemic-induced surge in remote students will not be temporary. Just like "work from home" will largely persist even when offices completely reopen, so too will "educate from home." Many libraries and institutions anticipate a hybrid approach, with some in-person student attendance and some remote, sometimes by the same students. While academic libraries have long served remote users, the surge in new remote users is driving a need to catch up to the demand.

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[13] See https://www.blackenterprise.com/hbcus-experience-record-surge-in-enrollment-for-2021-22-academic-year/.

[14] See https://www.forbes.com/sites/michaeltnietzel/2021/08/24/initial-estimates-show-fall-enrollments-up-at-several-public-universities/?sh=3c61e9ad4cb3.

[15] See https://www.universityworldnews.com/post.php?story=20210914110815378.

[16] See https://www.universityworldnews.com/post.php?story=20210911153341882.

[17] See, for example, Michael T. Nietzel, "Latest Numbers Show Largest College Enrollment Decline In A Decade," *Forbes*, Jun 10, 2021, https://www.forbes.com/sites/michaeltnietzel/2021/06/10/updated-numbers-show-largest-college-enrollment-decline-in-a-decade/?sh=249dadfe1a70.

Affordable learning is another increasing trend, again exacerbated by the pandemic. Upwards of 90 percent of academic institutions have affordable learning initiatives, and most libraries are at least somewhat involved in those initiatives. Textbook cost-reduction measures such as Open Educational Resources (OER) and Open Access (OA) materials have been on the rise over the past couple of years, but interest appears to be hitting critical mass, with the majority of libraries anticipating that OER/OA will be a dominant trend in the next few years. Libraries have been active in supporting OER/OA as well as developing content and/or working with faculty to develop OER/OA content for their students.

The pandemic year has put strain on academic libraries—as it has on just about everyone. They continue to weather the changes and are arming themselves with technological and budgeting savvy to overcome imminent and, in many cases, persistent challenges.

Appendix A. Demographics

This section breaks down the demographics of the institutions and libraries that responded to our survey.

Language

The majority (78.7%) of survey respondents preferred to answer our survey in English. Spanish was selected by 14.7%, the remainder a smattering of Korean, German, French, and Italian.

Figure 27. In what language would you prefer to answer the survey? —All academic libraries
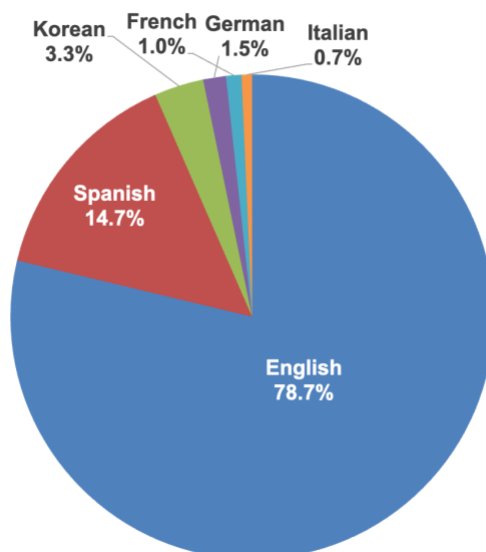
n=1,843

The following tables break down language preference by geographical region, enrollment, and degrees granted.

Table 51. In what language would you prefer to answer the survey? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
English	98.6%	16.6%	64.2%	62.5%	100.0%	80.3%
Spanish	1.0%	80.9%	1.1%	15.6%	0.0%	3.0%
Korean	0.0%	0.0%	34.1%	0.0%	0.0%	0.0%
German	0.1%	1.1%	0.0%	8.1%	0.0%	15.2%
French	0.3%	1.1%	0.6%	7.5%	0.0%	0.0%
Italian	0.1%	0.4%	0.0%	6.3%	0.0%	1.5%

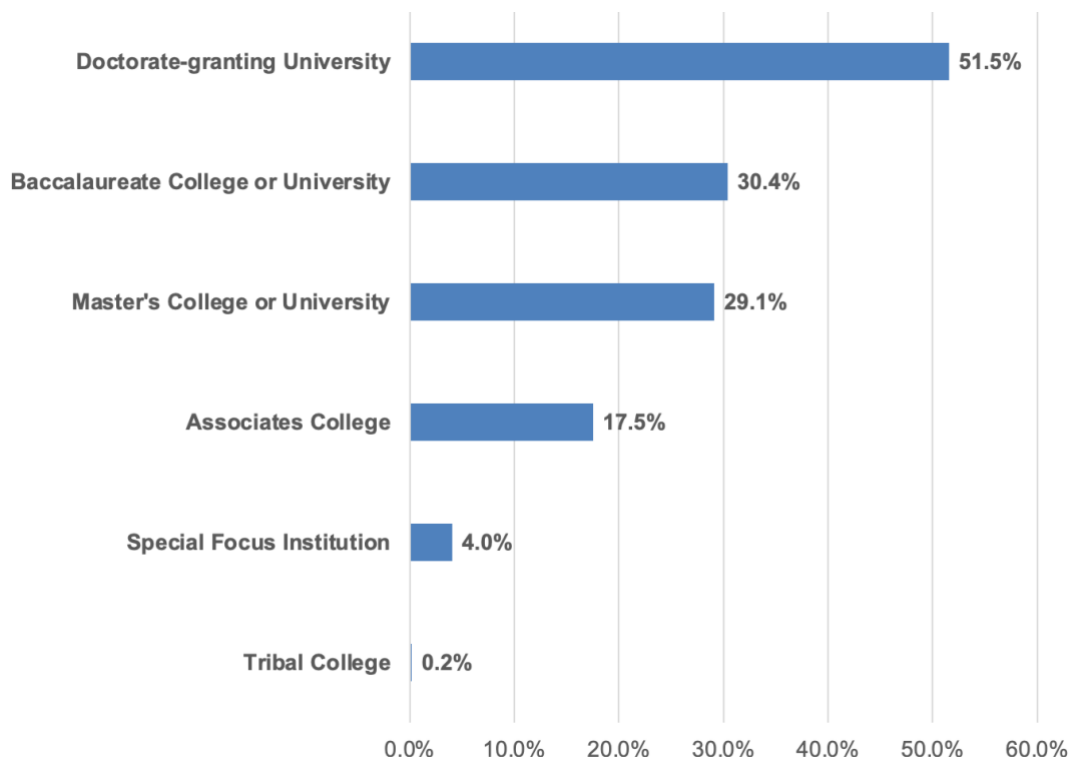www.LibraryJournal.com

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Table 52. In what language would you prefer to answer the survey? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
English	79.9%	79.6%	79.0%	76.5%	98.3%	97.7%	99.1%	97.8%
Spanish	15.0%	12.3%	13.9%	16.3%	1.1%	1.7%	0.6%	1.1%
Korean	1.9%	4.6%	4.1%	3.8%	0.0%	0.0%	0.0%	0.0%
German	1.7%	1.6%	1.4%	1.4%	0.2%	0.0%	0.0%	0.0%
French	0.6%	1.1%	1.1%	1.6%	0.4%	0.3%	0.3%	1.1%
Italian	0.9%	0.8%	0.5%	0.5%	0.0%	0.3%	0.0%	0.0%

Type of Institution

Just over one-half (51.5%) of North American survey respondents are libraries based in doctorate-granting universities, while nearly one-third (30.4%) are based in Baccalaureate colleges or universities. This question accepted multiple answers to account for institutions that grant more than one type of degree.

Figure 28. Which of the following classifications most closely describes your institution? Check all that apply.—All academic libraries
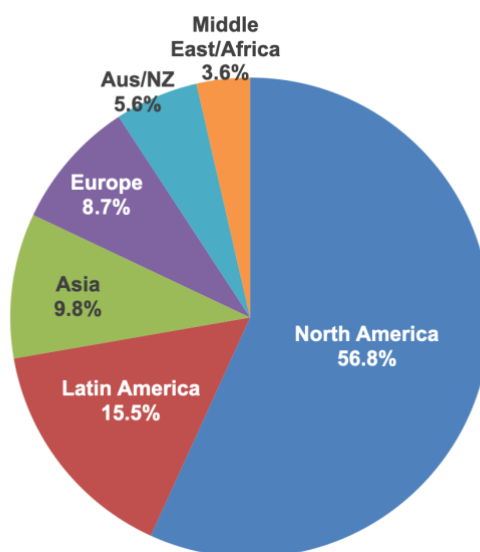

n=1,040

Table 53. Which of the following classifications most closely describes your institution? Check all that apply.—Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT (NORTH AMERICA ONLY)				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Doctorate-granting University	24.8%	42.6%	67.3%	83.7%	100.0%	38.3%	32.6%	11.0%
Baccalaureate College or University	42.3%	31.1%	21.8%	20.7%	19.2%	44.2%	100.0%	34.1%
Master's College or University	34.2%	36.3%	28.2%	17.5%	21.6%	100.0%	42.4%	14.3%
Associates College	21.3%	24.2%	18.2%	6.4%	3.7%	8.6%	19.6%	100.0%
Special Focus Institution	8.6%	1.6%	0.9%	1.6%	2.1%	4.3%	2.8%	4.9%
Tribal College	0.3%	0.0%	0.0%	0.4%	0.2%	0.3%	0.3%	0.0%

Location

Just over half (56.8%) of survey respondents are located in North America, with a further 15.5% based in Latin America, 9.8% in Asia, 8.7% in Europe, 5.6% in Australia/NewZealand, and 3.6% in the Middle East/Africa.

**Figure 29. In which region is your institution located? —All academic libraries**

n=1,831

Table 54. Which of the following classifications most closely describes your institution? —Academic libraries by enrollment

	STUDENT ENROLLMENT			
	< 5K	5K–9.9K	10K–19.9K	20K+
North America	57.8%	51.9%	60.1%	57.2%
Latin America	15.7%	16.4%	13.7%	15.3%
Asia	10.0%	12.6%	9.3%	8.0%
Europe	8.4%	9.6%	8.7%	8.4%
Aus/NZ	3.3%	4.9%	5.7%	9.1%
Middle East/Africa	4.8%	4.6%	2.5%	2.1%

Public or Private Institution

Nearly two-thirds (64.0%) of our survey respondents are from public or government-funded institutions.

Figure 30. Is yours a public or private institution? —All academic libraries
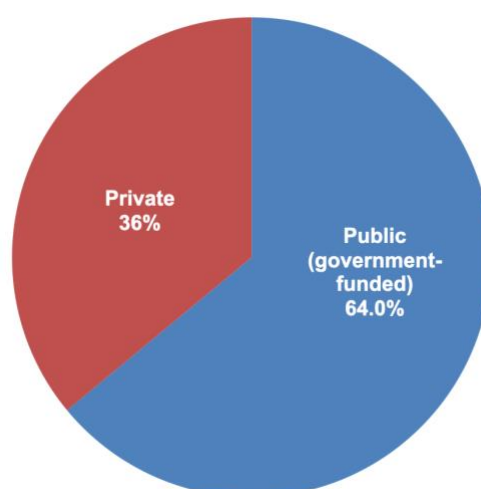
n=1,722

Table 55. Is yours a public or private institution? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Public (government-funded)	61.7%	59.5%	46.4%	87.9%	82.3%	78.1%
Private	38.3%	40.5%	53.6%	12.1%	17.7%	21.9%

Table 56. Is yours a public or private institution? —Academic libraries by enrollment and degrees granted

|	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Public (government-funded)	48.3%	63.4%	69.6%	82.2%	62.7%	49.1%	49.5%	90.6%
Private	51.7%	36.6%	30.4%	17.8%	37.3%	50.9%	50.5%	9.4%

Enrollment

The mean enrollment of the institutions represented in this survey is 12,641 students (median 8,288). More than one-half (55.7%) have enrollments under 10,000 students.

Figure 31. What was your institution's approximate full-time student enrollment in March 2021? —All academic libraries
Mean: 12,641
Median: 8,288
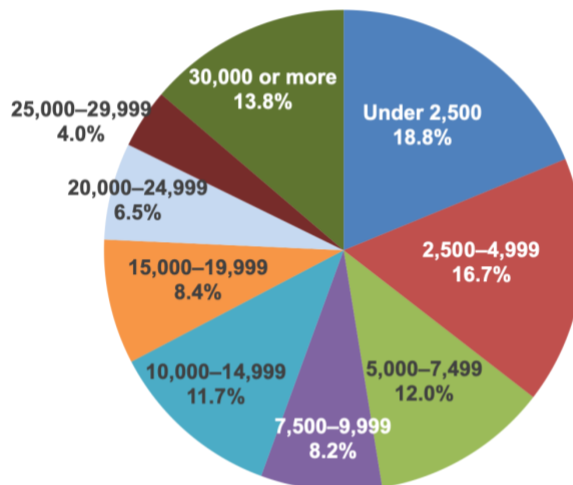
n=1,824

Table 57. What was your institution's approximate full-time student enrollment in March 2021? —Academic libraries by region

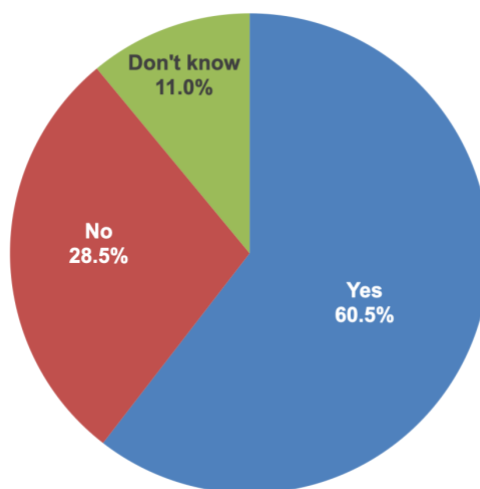|	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Under 2,500	19.7%	22.3%	17.9%	12.0%	16.0%	15.2%
2,500–4,999	16.3%	14.0%	17.9%	22.2%	5.0%	31.8%
5,000–7,499	9.6%	16.2%	13.4%	17.1%	11.0%	16.7%
7,500–9,999	8.8%	5.4%	12.3%	5.1%	7.0%	9.1%
10,000–14,999	12.7%	10.1%	10.6%	13.3%	10.0%	6.1%
15,000–19,999	8.6%	7.9%	8.4%	7.0%	11.0%	7.6%
20,000–24,999	5.1%	4.7%	10.1%	8.2%	13.0%	10.6%
25,000–29,999	4.9%	2.2%	3.9%	4.4%	1.0%	1.5%
30,000 or more	14.2%	17.3%	5.6%	10.8%	26.0%	1.5%
Mean	12,823	12,621	10,894	12,207	17,163	8,636
Median	8,763	7,110	7,670	7,314	15,454	5,454

Table 58. What was your institution's approximate full-time student enrollment in March 2021? —Academic libraries by degrees granted

	DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Under 2,500	7.0%	21.5%	29.7%	19.3%
2,500–4,999	10.4%	20.5%	19.9%	24.3%
5,000–7,499	6.6%	10.9%	9.2%	14.4%
7,500–9,999	8.7%	11.9%	9.5%	11.0%
10,000–14,999	14.3%	13.2%	9.5%	14.9%
15,000–19,999	13.6%	7.3%	5.7%	7.2%
20,000–24,999	7.5%	3.6%	3.8%	2.2%
25,000–29,999	8.5%	3.6%	4.1%	2.2%
30,000 or more	23.5%	7.3%	8.5%	4.4%
Mean	18,072	10,066	9,684	8,791
Median	16,146	6,817	5,086	6,105

Part of a Consortium

Six out of ten (60.5%) respondents are part of a consortium that shares technology and other resources, 28.5% are not, and 11% do not know.

Figure 32. Is your academic library part of a consortium that shares technology? —All academic libraries

n=1,799

Being part of a consortium is more of a North American and European tendency, with academic libraries in Oceania the least likely to be part of a consortium.

Table 59. Is your academic library part of a consortium that shares technology? —Academic libraries by region

	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Yes	65.2%	53.3%	53.9%	63.1%	38.5%	58.7%
No	24.4%	33.9%	36.0%	28.0%	52.1%	19.0%
Don't know	10.4%	12.8%	10.1%	8.9%	9.4%	22.2%

Table 60. Is your academic library part of a consortium that shares technology? —Academic libraries by enrollment and degrees granted

|	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K– 19.9K	20K+	Doctor- ate	Master's	Bacca- laureate	Asso- ciates
Yes	59.6%	68.4%	58.7%	57.0%	63.6%	61.0%	67.5%	70.6%
No	31.7%	23.6%	30.5%	26.2%	22.8%	29.0%	22.5%	23.9%
Don't know	8.7%	8.0%	10.8%	16.8%	13.6%	10.0%	10.0%	5.6%

Full-Time Staff

Responding libraries have an average of 41.2 full-time employees (median 28.1, indicating some outliers in our sample). Three-fourths (75.9%) have fewer than 50 full-time employees.

Figure 33. How many full-time equivalent staff work in your academic library? —All academic libraries
Mean: 41.2
Median: 28.1
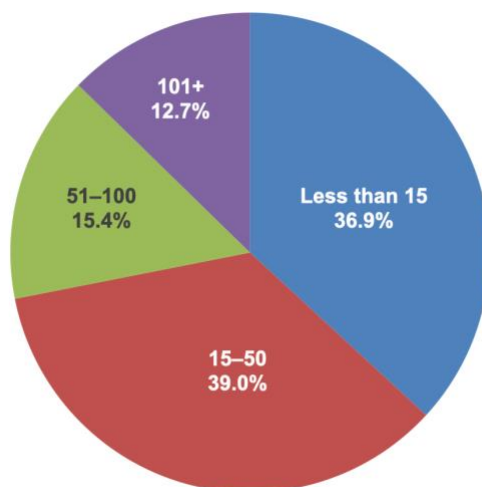
n=1,826

Table 61. How many full-time equivalent staff work in your academic library? —Academic libraries by region

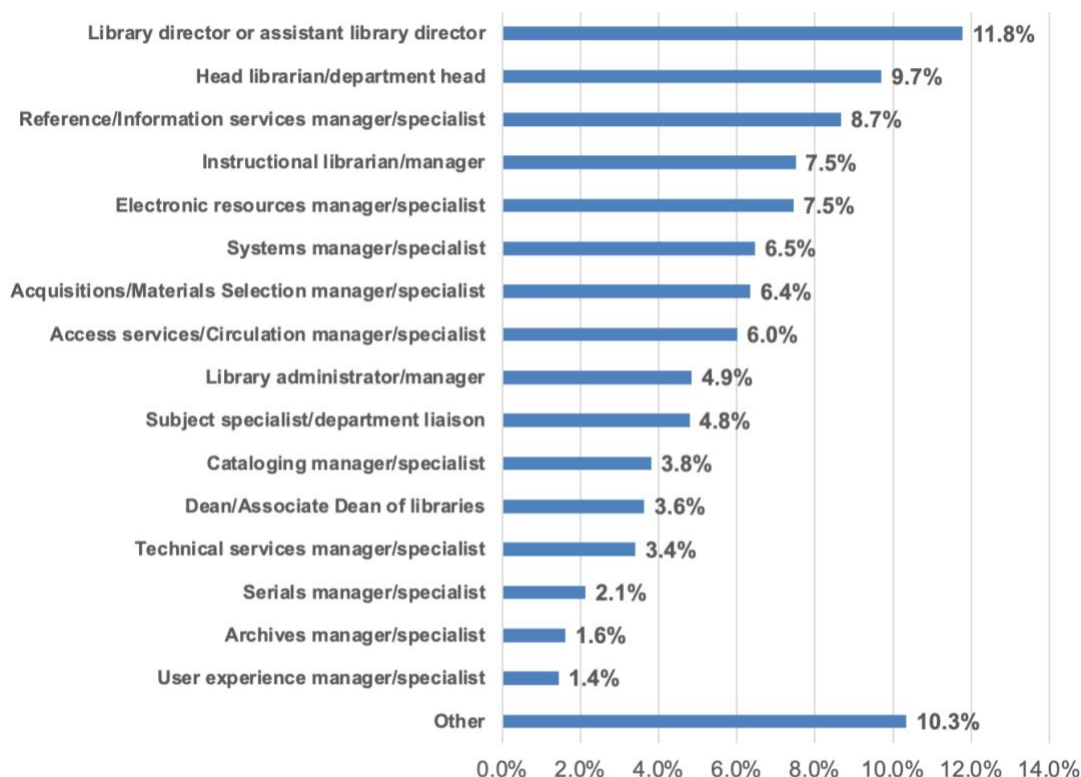|	INSTITUTION REGION					
	North America	Latin America	Asia	Europe	Oceania (Aus/NZ)	Middle East/ Africa
Less than 15	35.3%	45.7%	51.4%	24.7%	29.4%	22.7%
15–50	36.0%	29.1%	31.3%	41.8%	26.5%	53.0%
51–100	14.7%	12.6%	10.6%	22.2%	25.5%	18.2%
101+	14.0%	12.6%	6.7%	11.4%	18.6%	6.1%
Mean	42.3	38.0	31.0	45.8	52.1	40.1
Median	29.3	20.2	13.8	36.2	42.2	33.0

Table 62. How many full-time equivalent staff work in your academic library? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Less than 15	69.4%	28.8%	18.6%	11.0%	19.5%	38.9%	41.5%	62.2%
15–50	26.4%	53.4%	46.4%	23.3%	34.8%	42.9%	40.3%	27.2%
51–100	3.0%	12.9%	24.3%	28.5%	20.9%	10.6%	11.2%	8.3%
101+	1.3%	4.9%	10.7%	37.2%	24.8%	7.6%	7.0%	2.2%
Mean	19.2	35.6	47.4	72.9	57.4	34.6	33.7	23.9
Median	11.5	28.9	38.7	78.0	45.6	24.1	22.4	12.2

Primary Job Function

The job functions of the individuals that completed our survey include a variety of administrative (30.0%), public facing (25.9%), and support positions (33.7%). The largest specific job titles identified were library director/assistant director (11.8%), head librarian/department head (9.7%), and reference specialist/manager (8.7%). Ten percent selected "other," which included a smattering of faculty members, part-time librarians, and various staff in research positions.

Figure 34. What is your primary job function? —All academic libraries

n=1,731

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Table 63. What is your primary job function? —Academic libraries by region

	INSTITUTION REGION					
	North America	**Latin America**	**Asia**	**Europe**	**Oceania (Aus/NZ)**	**Middle East/ Africa**
Library director or assistant library director	10.8%	16.0%	4.1%	14.2%	15.8%	16.9%
Head librarian/department head	6.6%	19.7%	17.8%	7.4%	5.9%	5.1%
Reference/Information services manager/specialist	10.5%	7.4%	5.9%	5.4%	3.0%	8.5%
Instructional librarian/manager	7.3%	13.8%	4.7%	5.4%	5.0%	0.0%
Electronic resources manager/specialist	8.6%	2.6%	11.8%	6.8%	5.0%	5.1%
Systems manager/specialist	5.3%	2.2%	7.1%	16.2%	7.9%	16.9%
Acquisitions/Materials Selection manager/specialist	6.6%	2.6%	12.4%	6.1%	7.9%	0.0%
Access services/Circulation manager/specialist	7.2%	1.9%	7.7%	2.0%	9.9%	3.4%
Library administrator/manager	3.0%	6.7%	7.1%	4.7%	11.9%	8.5%
Subject specialist/department liaison	4.8%	3.0%	3.6%	7.4%	6.9%	6.8%
Cataloging manager/specialist	4.3%	3.7%	3.0%	2.0%	5.0%	1.7%
Dean/Associate Dean of libraries	5.0%	2.6%	1.2%	0.7%	1.0%	5.1%
Technical services manager/specialist	3.7%	0.7%	3.6%	6.8%	2.0%	5.1%
Serials manager/specialist	1.1%	3.0%	2.4%	6.1%	1.0%	5.1%
Archives manager/specialist	1.6%	1.1%	2.4%	0.7%	1.0%	5.1%
User experience manager/specialist	1.4%	0.7%	1.2%	2.7%	2.0%	1.7%
Other	12.2%	12.3%	4.1%	5.4%	8.9%	5.1%

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Table 64. What is your primary job function? —Academic libraries by enrollment and degrees granted

	STUDENT ENROLLMENT				DEGREES GRANTED BY INSTITUTION (NORTH AMERICA ONLY)			
	< 5K	5K–9.9K	10K–19.9K	20K+	Doctor-ate	Master's	Bacca-laureate	Asso-ciates
Library director or assistant library director	17.0%	11.6%	8.5%	7.1%	6.2%	12.9%	11.7%	14.7%
Head librarian/department head	11.1%	7.1%	11.7%	8.0%	7.1%	5.9%	5.7%	8.2%
Reference/Information services manager/specialist	7.8%	10.7%	9.7%	7.8%	10.5%	10.1%	8.7%	12.4%
Instructional librarian/manager	7.8%	7.1%	7.9%	7.1%	6.7%	8.4%	8.7%	7.1%
Electronic resources manager/specialist	6.2%	10.1%	8.2%	6.6%	8.1%	9.4%	9.7%	10.0%
Systems manager/specialist	6.2%	6.0%	7.9%	6.4%	5.4%	5.6%	5.4%	4.1%
Acquisitions/Materials Selection manager/specialist	4.6%	8.0%	7.3%	7.1%	8.1%	7.7%	6.0%	3.5%
Access services/Circulation manager/specialist	3.9%	8.6%	6.2%	6.9%	6.5%	6.6%	7.0%	7.6%
Library administrator/manager	7.2%	4.2%	2.9%	3.5%	1.8%	2.1%	3.0%	6.5%
Subject specialist/department liaison	2.6%	5.4%	3.2%	8.5%	6.2%	2.4%	4.7%	3.5%
Cataloging manager/specialist	3.6%	3.9%	3.8%	3.8%	4.6%	4.2%	4.0%	3.5%
Dean/Associate Dean of libraries	3.4%	2.7%	4.7%	4.0%	6.2%	4.5%	2.0%	2.9%
Technical services manager/specialist	4.7%	2.7%	3.8%	1.9%	3.8%	3.8%	4.0%	4.1%
Serials manager/specialist	3.1%	2.1%	1.2%	1.7%	1.4%	1.4%	2.0%	0.6%
Archives manager/specialist	1.6%	3.0%	0.6%	1.4%	1.6%	2.4%	2.7%	0.6%
User experience manager/specialist	0.7%	1.2%	2.6%	1.7%	1.0%	2.1%	2.3%	2.9%
Other	8.5%	5.7%	9.7%	16.5%	14.9%	10.1%	12.4%	7.6%

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Appendix B. Methodology and Questionnaire

Library Journal emailed a survey invitation to U.S. and international academic libraries on May 19, 2021, with a reminder to non-responders on June 3, 2021. ProQuest emailed similar invitations to its international customers in June and July. There were six language translations of the survey made available: English, Spanish, French, German, Italian, and Korean.

A drawing to win one of three $100 Visa® gift cards was offered as an incentive to reply. The survey closed on July 12, 2021 with a total of 1,843 responses. Data compilation, tabulation, and analysis were conducted by *LJ* research. The data is unweighted.

2021 State of the Academic Library Survey

Demographics

1. In what language would you prefer to answer the survey?

English
French
German
Italian
Spanish

2. Which of the following classifications most closely describes your institution? Check all that apply.

Doctorate-granting University
Master's College or University
Baccalaureate College or University
Mixed Baccalaureate/Associates College
Associates College
Special Focus Institution
Tribal College
Not a type of institution listed above [thank and end survey.]

3. In which country is your institution located? _____ [Drop-down list]

4. Is yours a public or private institution?

Public (government-funded)
Private

5. What was your institution's approximate full-time student enrollment in March 2021?

Under 2,500
2,500 – 4,999
5,000 – 7,499
7,500 – 9,999
10,000 – 14,999
15,000 – 19,999
20,000 – 24,999
25,000 – 29,999
30,000 or more

6. Is your academic library part of a consortium that shares technology?

Yes
No
Don't know

7. How many full-time equivalent staff work in your academic library?

Less than 15
15-50
51-100
101+

8. What is your primary job function?

Access services/Circulation manager/specialist
Acquisitions manager/specialist
Archives manager/specialist
Cataloging manager/specialist
Collection development/Materials selection manager/specialist
Dean/Associate Dean of libraries
Electronic resources manager/specialist
Head librarian/Department head
Instructional librarian/manager
Library administrator/manager
Library director or Assistant library director
Reference/Information services manager/specialist
Serials manager/specialist
Subject specialist/Department liaison
Systems manager/specialist
Technical Services manager/specialist
User experience manager/specialist
Other, please specify:_____

Direction

9. How do you predict your total library budget will change over the next five years?

Reduce significantly
Reduce slightly
Stay the same
Increase slightly
Increase significantly
Don't know

10. For each of the following, how do you imagine the library's budget will change next year?

	Reduce significantly	Reduce slightly	Stay the same	Increase slightly	Increase significantly	Don't know
Library management system						
Resource discovery tools						
Resource sharing/Interlibrary loan						
Resource list management						
Cataloging services						
E-resources: Books						
E-resources: Journals						
E-resources: Other						
Scanning physical materials						
Tools for distance learning						
Textbooks						
Course materials						
Special collections						
Equipment, furniture and supplies						
Facilities						

11. During the past year, did your library acquire any software/services that are not part of the supported functionality of your existing library management system?

Yes (please specify which software/services):_____
No
Don't know

12. Do you anticipate that the library will be eligible for upcoming special funding, such as CARES funding, for technology and/or content?

	Yes	No	Maybe	Don't know
Technology				
Content				

13. If you believed that a particular library initiative could bring additional value to teaching and learning, how would the initiative get funded? Check all that apply.

Make a justification for increased institutional support
Shift existing library budget
Grant funding
Other, please specify:_____

14. If you believed that a particular library initiative could bring additional value to research, how would the initiative get funded? Check all that apply.

Make a justification for increased institutional support
Shift existing library budget
Grant funding
Other, please specify:_____

15. If your library budget magically received an additional 25 percent to further the institutional mission, what might you invest in? Check all that apply.

More staff
Pay increases
Building/facility improvements
Course materials
Digitization initiatives
Diversity, equity, and inclusion (DEI) initiatives
More physical content
More electronic resources
More equipment, furniture, and supplies
New or upgraded library management system
New or upgraded resource sharing software
New or upgraded research data management tools
OER initiatives
Other (please specify):_____

16. How important are each of the following to your institutional and library missions?

Institution's Mission	No importance	Low importance	Medium importance	High importance	Don't know
Student engagement					
Student retention					
Research excellence					
Affordable learning					

Library's Mission	No importance	Low importance	Medium importance	High importance	Don't know
Connect the library to the academic ecosystem					
Prove library value to institutional leadership					
Provide an excellent patron experience					
Provide course materials and support faculty					
Support research					
Support institutional mission					
Teach students research and information skills					
Provide individual and collaborative workspaces					
Collection development and preservation					
Support distance teaching and learning					
Converting print to digital/Scanning					
Preservation of rare materials					
Support library linked data					

17. Which of the following are significant challenges for your library? Please check all that apply.

Acquisitions budget limitation
Cataloging and metadata management
Challenges with discovering multiple resource formats
Collaborating with other libraries
Communication and collaboration with faculty
Communication with administration
Controlled digital lending
Consortia collaboration
Discovery of resources
Equipment management
Facilities management
Funding cuts
Inadequate insight to resource usage
Inadequate IT systems
Lack of physical space
Linking to resources

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Other departments want to use library space for specific purposes
Staff shortages
Staff training
Supporting affordable learning
Supporting diversity, equity, inclusion initiatives
Supporting international students
Supporting remote students
Other (please specify):_____
None of the above

18. How likely is the library to implement changes to library services based on the experience of serving more remote students?

Very unlikely
Somewhat unlikely
Somewhat likely
Very likely
Don't know]

18a. [If Somewhat likely or Very likely…] What would be the top priority for change?_____

19. How important are the following when your library purchases technology systems and services?

	No importance	Low importance	Medium importance	High importance	Don't know
Cloud-based					
Open source					
Full-featured, best of breed					
Simple, easy administration					
Customizable user experience					
Interoperability and integrations					
Product support					
Developer support					
Product training					
Documentation					
Lowest priced					
Experience with provider					

20. How likely is your library to reduce its cataloging budget in the next year?

Very unlikely
Somewhat unlikely
Somewhat likely
Very likely
Don't know

21. Is your library interested in linked data?

Yes [skip to Q21a]
No [skip to Q22]
Maybe [skip to Q21a]
Don't know [skip to Q22]

21a. Is your library actively working on plans to shift to linked data for cataloging?

Yes, but not in the next 18 months [skip to 21a(1)]
Yes, beginning soon [skip to 21a(2)]
Yes, we are already doing most cataloging in linked data [skip to 21a(2)]
Yes, we are already doing some cataloging in linked data [slip to 21a(2)]
No [skip to 21a(1)]
Don't know [skip to 22]

21a(1). What is the main reason you have not planned or moved to linked data cataloging?

Limited capacity
There's not enough value
Need better tools and more knowledge
Don't know
Other, please specify:_____
[after completion of this question proceed to Q22]

21a(2). What plans, if any, does your library have with using linked data?

_____

Affordable Learning

22. Who is leading the affordable learning initiatives at your institution? Check all that apply.

Provost office
CIO office
Students' office
Library
Faculty
Other, please specify:_____
We have no affordable learning initiatives [Skip to Q23]
Don't know [Skip to Q23]

22a. How would you describe your library's involvement in affordable learning initiatives?

Not involved
Somewhat involved
Very involved
Don't know

23. To what degree do you agree with the following statement? Learning affordability is more important than it was at this time last year.

Strongly disagree
Somewhat disagree
Neutral
Somewhat agree
Strongly agree
Don't know

24. In which of the following ways is the library involved with Open Educational Resources (OER) content? Please check all that apply.

Support the development of OER content at this institution [skip to Q24a]
Make OER content available via the library [skip to Q24a]
Support OER initiatives at the state or consortial level [skip to Q24a]
Other, please specify:_____ [skip to Q24a]
Library is not involved with OER content [skip to Q25]

24a. Briefly explain more about how the library is involved in OER.

_____

25. Do you expect the library's approach to supporting course materials will change due to evolving needs?

Yes, significant change [skip to Q25a]
Yes, minor change [skip to Q25a]
No change [skip to 26]
Don't know [skip to 26]

25a. What are the most important changes in the next 18 months?

_____

25b. What do you predict will be the most important long-term changes – from 2022 and beyond?

_____

Resource Sharing

26. Would you consider resource sharing for course materials?

Yes
No
Maybe
Don't know

27. Which, if any, of the following interlibrary loan-related activities pose significant challenges for your library? Check all that apply.

Managing consortial-level resource sharing initiatives
Administrative effort to fulfill incoming ILL requests to borrow
Turnaround time for borrowing request fulfillment by partner lenders
Administrative effort to fulfill incoming ILL requests to lend
Costs related to borrowing activities
The imbalance of our ILL borrowing vs. our lending
Other, please specify:_____
None of the above

28. What are your primary interlibrary loan tools? Check all that apply.

Consortial resource sharing
RapidILL
Clio
RelaisILL
Reshare
Rapido
ILLiad
Tipasa
Other, please specify:_____

Research and the Library

29. In which of the following ways does your library support faculty research? Check all that apply.

Provide access to scholarly sources
Provide access to non-scholarly varied content sources
Manage article processing charges
Find relevant journals for publication
Deposit publications or datasets to an institutional research repository
Provide metadata support
Submit research for publication
Ensure compliance with Open Access policies
Monitor the impact of research conducted in the library
Prepare data management plans
Monitor the impact of faculty research
Support faculty profiles
Provide citation management software
Access to research funding databases
Other, please specify: _____
None of the above