



LYRASIS Research

LYRASIS Research Report

# Digital Content Acquisition Survey Report

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**Report Title:** LYRASIS Digital content Acquisition Survey Report

**Project Abstract:**

In the fall of 2021, the LYRASIS Content and Scholarly Communication Initiatives (CSCI) team conducted a survey of academic-leaning institutions that acquire digital content through LYRASIS in order to better understand national content acquisition trends. This report examines the findings from that survey.

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# Executive Summary

A core part of the Content and Scholarly Communication Initiatives (CSCI) team mission at LYRASIS is to facilitate and negotiate both paywalled and Open Access (OA) digital content offers that are based on collaboration with our members and the wider library community. As we plan future strategic initiatives, we are always interested in understanding more about the acquisition trends circulating amongst our membership and various participant communities.

We released a survey in September 2021 to study the digital content acquisition patterns of academic-leaning LYRASIS members. The survey, which received 77 responses, represented a wide range of different sized academic institutions, and provided us with valuable feedback about member acquisition trends.

Insights from this survey include:

- OA content still makes up a very small percentage of current electronic resources budgets - the majority of institutions are spending less than 10% of their budgets on OA, if they are spending any money on OA at all. However, even though the percentage is small, and despite pandemic budget cuts, OA commitment has grown from last year to the current year.
- For most institutions, content takes precedence over purchase model, be it subscription or perpetual rights. Only the largest doctoral institutions appear to prefer the perpetual rights model.
- While many budgets are either static or shrinking, most libraries still feel there is some flexibility in their budget to add new paywalled resources and/or contribute to new OA resources, but it is highly dependent on whether the content suits their institutional needs.
- The majority of institutions saw funds transition from their print to electronic collections during the pandemic. Most believe this is a permanent move.

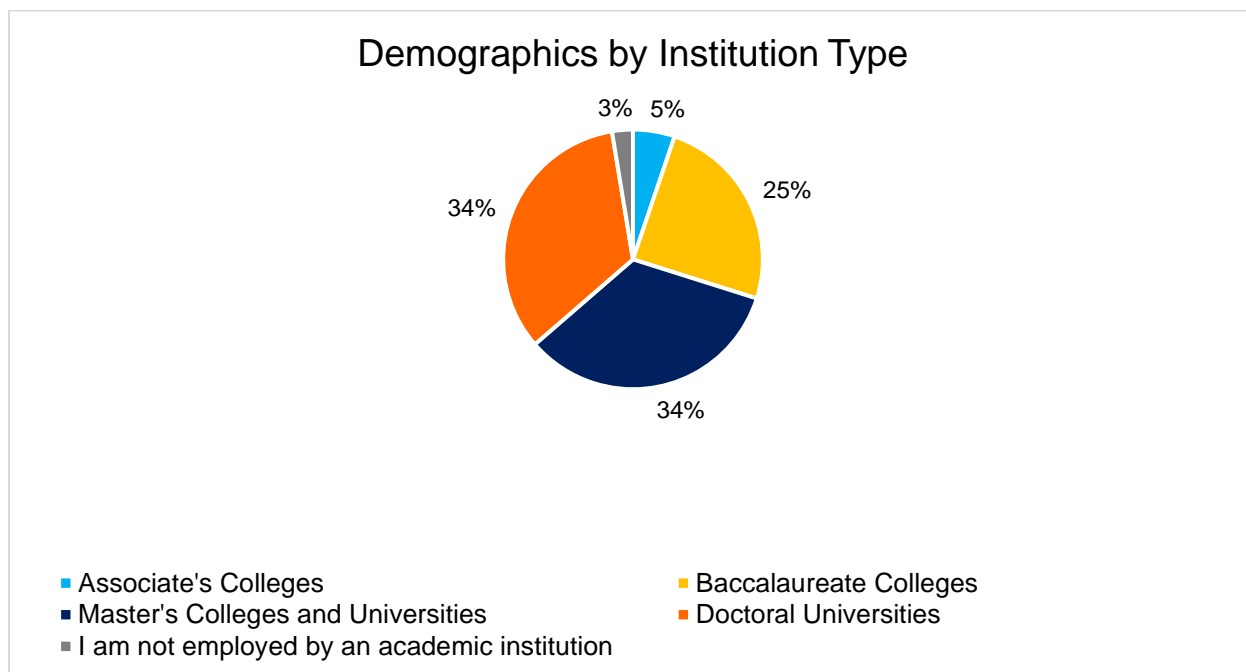
The findings from this survey provided valuable evidence for the CSCI team to make informed strategic planning decisions in the future.

# Survey Results

## DEMOGRAPHICS

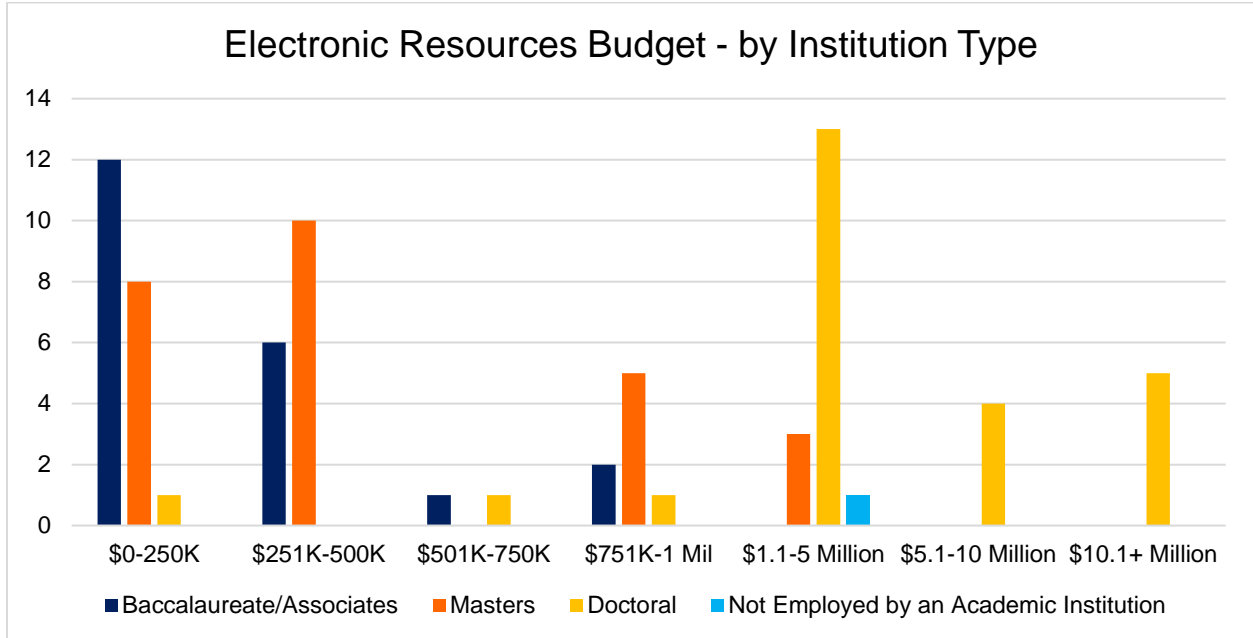
Carnegie Classifications	Count
Associate's Colleges: Mixed Transfer/Career & Technical-Mixed Traditional/Nontraditional	4
Baccalaureate College—Arts & Sciences (259)	13
Baccalaureate College—Diverse Fields (324)	6
Master's College and University: Larger programs (M1)	8
Master's College and University: Medium programs (M2)	4
Master's College and University: Smaller programs (M3)	14
Doctoral University – Higher Research Activity (R2)	10
Doctoral University – Highest Research Activity (R1)	12
Doctoral University – Moderate Research Activity (R3)	4
I am not employed by an academic institution	2
<b>Total</b>	<b>77</b>

The survey received 77 anonymous responses, with no repeat IP addresses. When broken down by institution type, the survey responses were split fairly evenly between Baccalaureate Colleges, Master's Colleges and Universities, and Doctoral Universities.



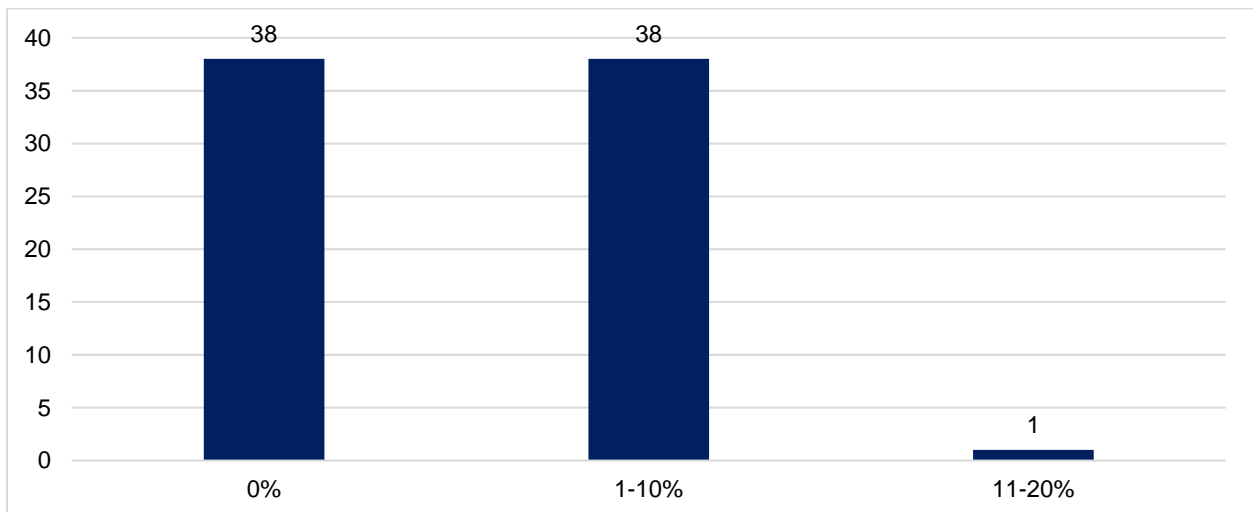
## ELECTRONIC RESOURCES BUDGET

**Question 1. What is the approximate size of your electronic resources collections budget for this current fiscal year?**



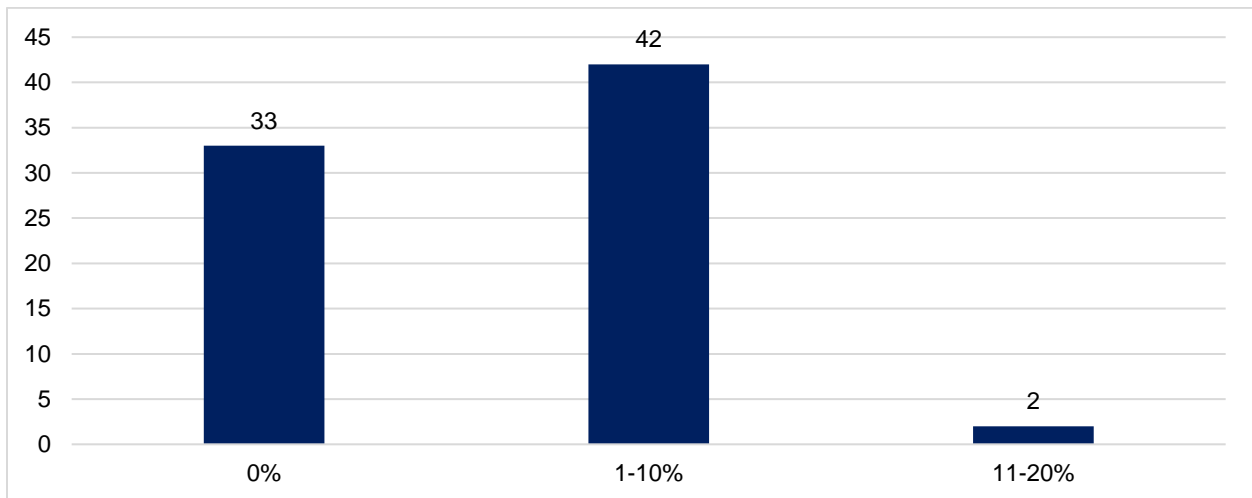
Approximately 52% of respondents to this question have budgets falling on or below \$500,000.00, with one other major group of respondents holding budgets of between \$1 million and \$5 million dollars. Unsurprisingly, most budgets above \$1 million dollars are held by doctoral institutions.

**Question 2: In the previous year, what percent of your electronic resources budget was spent in support of OA Publishing (as opposed to paywalled content)?**



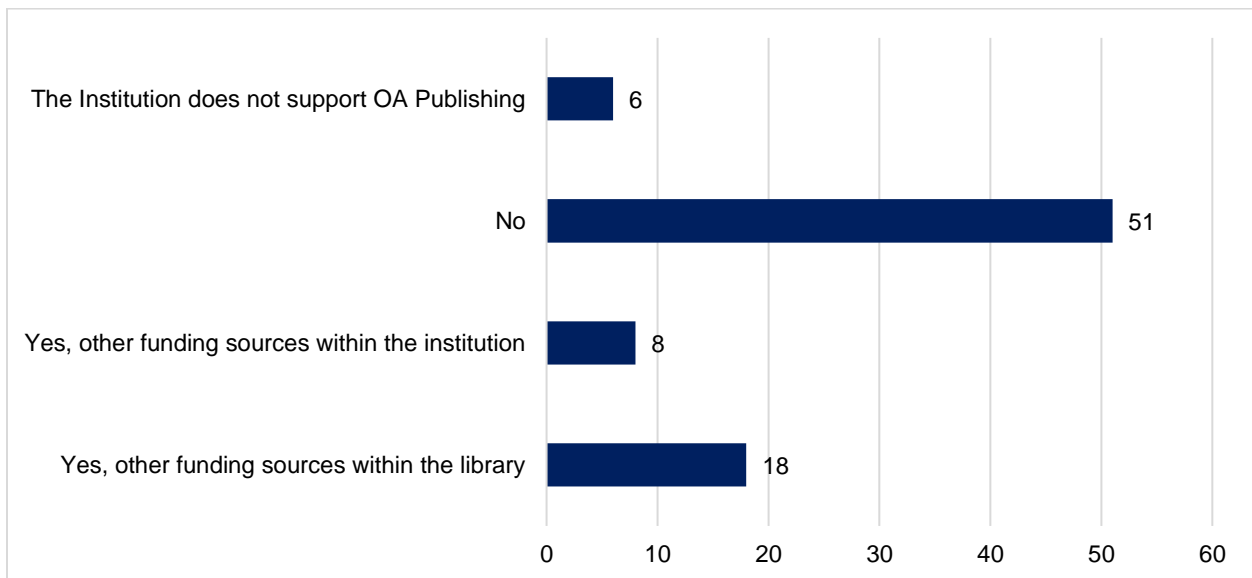
This question confirmed our assumption that OA content still makes up a very small percentage of current library budgets. 49% of the respondents spent less than 10% of their budget on OA content in the previous year, while 49% of respondents spent no part of their budget on OA content. Only one respondent said they spent between 11% and 20%, and no respondents spent more than 20% of their budget on OA.

**Question 3: In the current fiscal year, what percent of your electronic resources budget do you plan on spending in support of OA publishing (as opposed to paywalled content)?**



There is a mild but noticeable shift from the previous year to the current year. 6% of respondents moved from the 0% to the 1-10% category, indicating a slight increase in OA spending.

**Question 4: Are there campus funds other than the library's electronic resources budget that are used to support OA publishing?**



The majority of respondents said they do not have other budgets that support OA publishing. However, if they do, those budgets are more likely to be within the library than outside.

The respondents that did indicate there were other offices within their institutions providing support for OA publishing were asked to describe those areas, which fell into three broad categories:

First, several institutions said academic departments or faculty groups had some individual or group funds:

- *“Funding for author fees is provided by the Faculty Development Fund and individual department funds.”*
- *“Funding within individual academic departments.”*
- *“Some departments will cover the costs on an ad hoc basis.”*

The second major source of OA support comes from specific OA funds within libraries, sometimes in collaboration with campus research offices:

- *“Libraries offers OA fund for gold OA to all...students, faculty staff; VP for Research & Partnerships offers funding for hybrid OA.”*
- *“The library has a small OA fund that reimburses APCs through an application process. The university's office of research has contributed to that fund.”*
- *“We fund some OER faculty incentives using library (non-electronic) monographs funds.”*
- *“Library provides a few thousand a year to fund individual faculty OA publishing charges that meet our criteria.”*

Finally, some institutions receive special funds or grants that underwrite their OA programs:

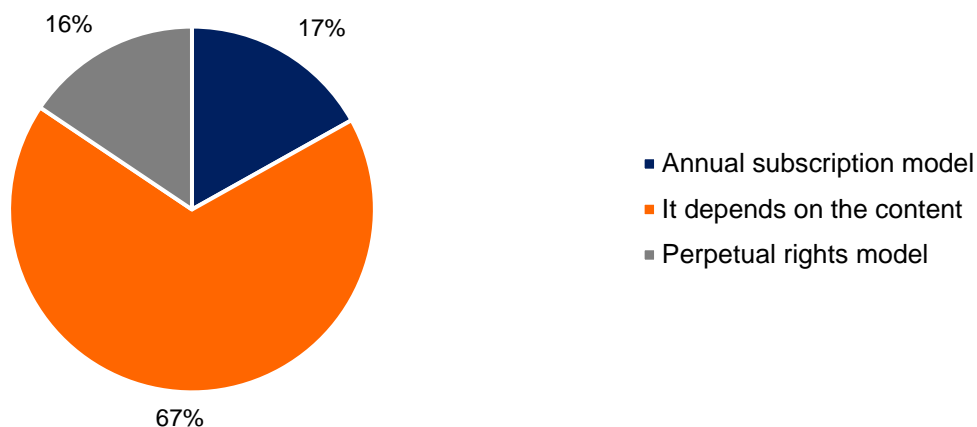
- *“For the past several years, the library has received an Arcadia Foundation grant that is used for various OA initiatives, including publishing support.”*
- *“Grant funding for Libre Texts.”*
- *“We received an Institutional Grant from M.O.S.T. Commons.”*

## ACQUISITION MODELS

**Question 6: When acquiring paywalled electronic resources and given an option, do you prefer an annual subscription model (the library pays a regular fee to continue accessing content without ownership) or a perpetual rights access model (the library purchases the right to the content in perpetuity, and can either provide its own access to the content or pay a platform fee to display the content)?**

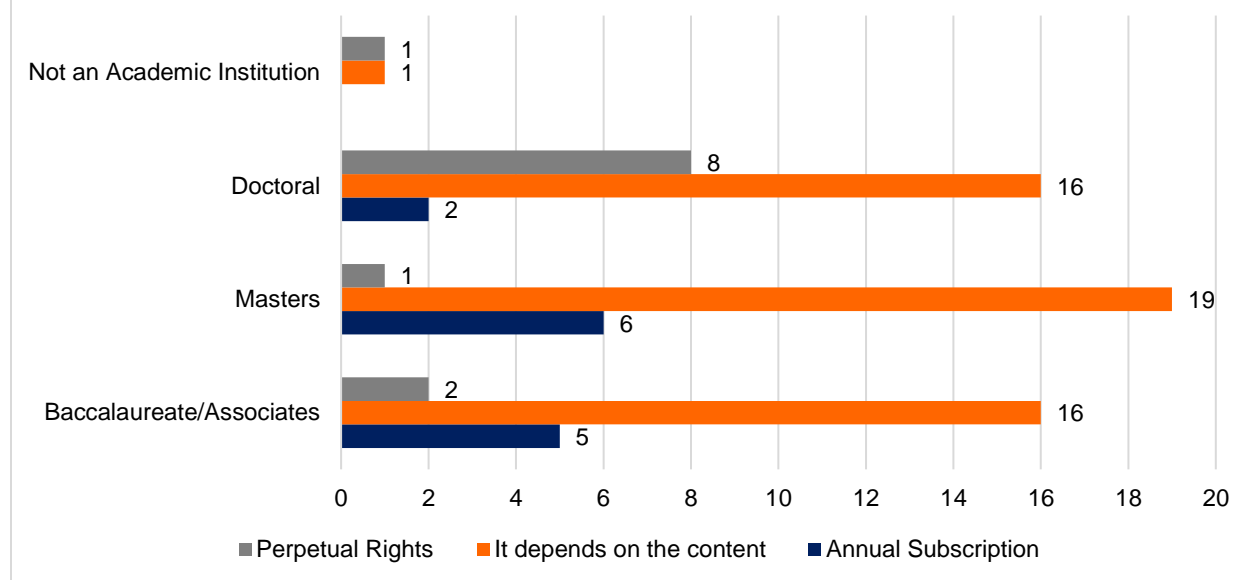


## Paywalled Electronic Resources Model



The majority of respondents do not have a stated preference for either model – 17% said they prefer an annual subscription model, while 16% said they prefer a perpetual rights model.

## Paywalled Electronic Resources Model - by Institution Type

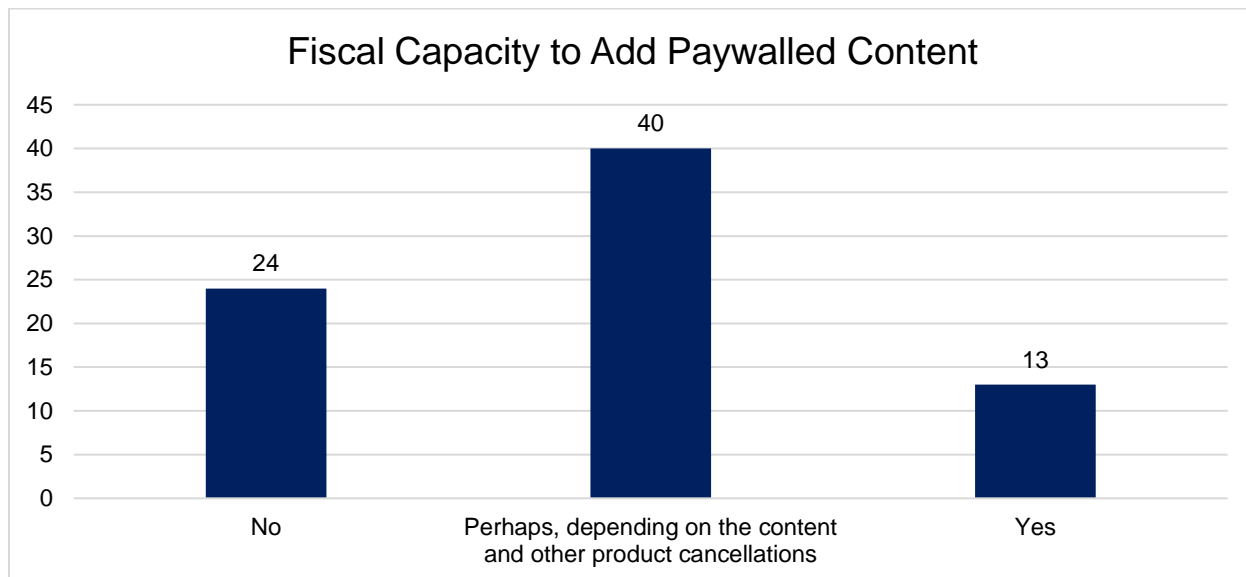


When broken down roughly by institution type (baccalaureate, masters, doctoral), each group still predominantly chooses the model based on content. However, the biggest differentiator involves perpetual rights models – the largest institutions, doctoral universities, show a clear preference for perpetual rights, more than any other grouping.

## FISCAL CAPACITY

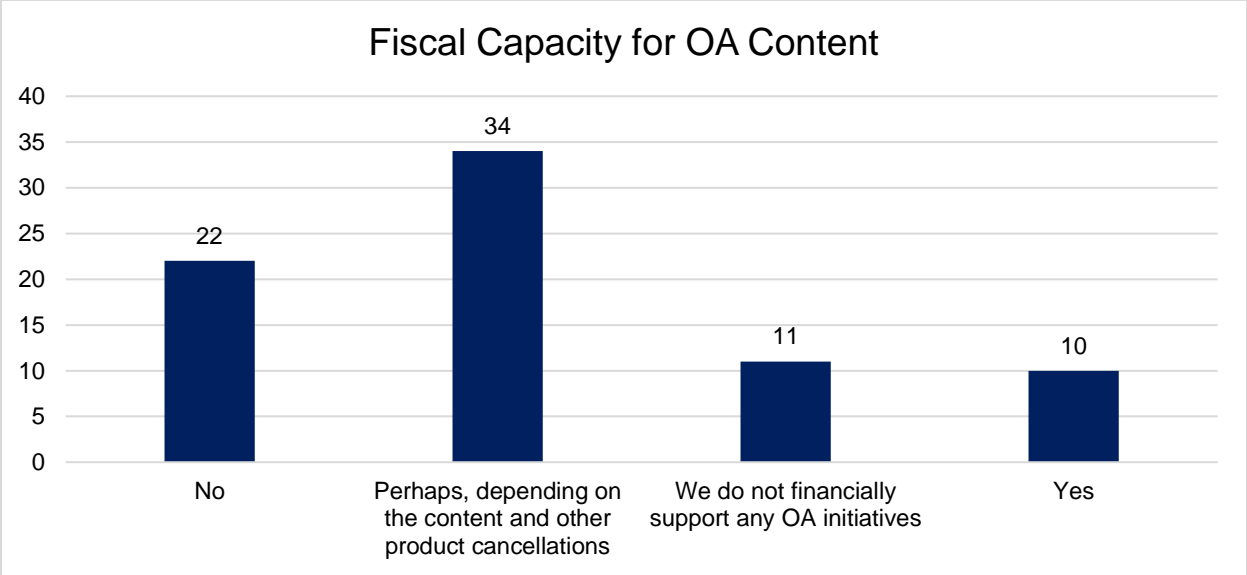
We were also interested in understanding how much flexibility libraries believe they have to add new resources – during the pandemic we have seen budget cuts across institutions, regardless of size, so the ability to add new resources, whether paywalled or OA, would influence our decision making in how to support our members.

**Question 7: Do you believe that your library will have the fiscal capacity to add new paywalled content (a.k.a. content not already included in the budget) to its collection between now and June 30th, 2022?**



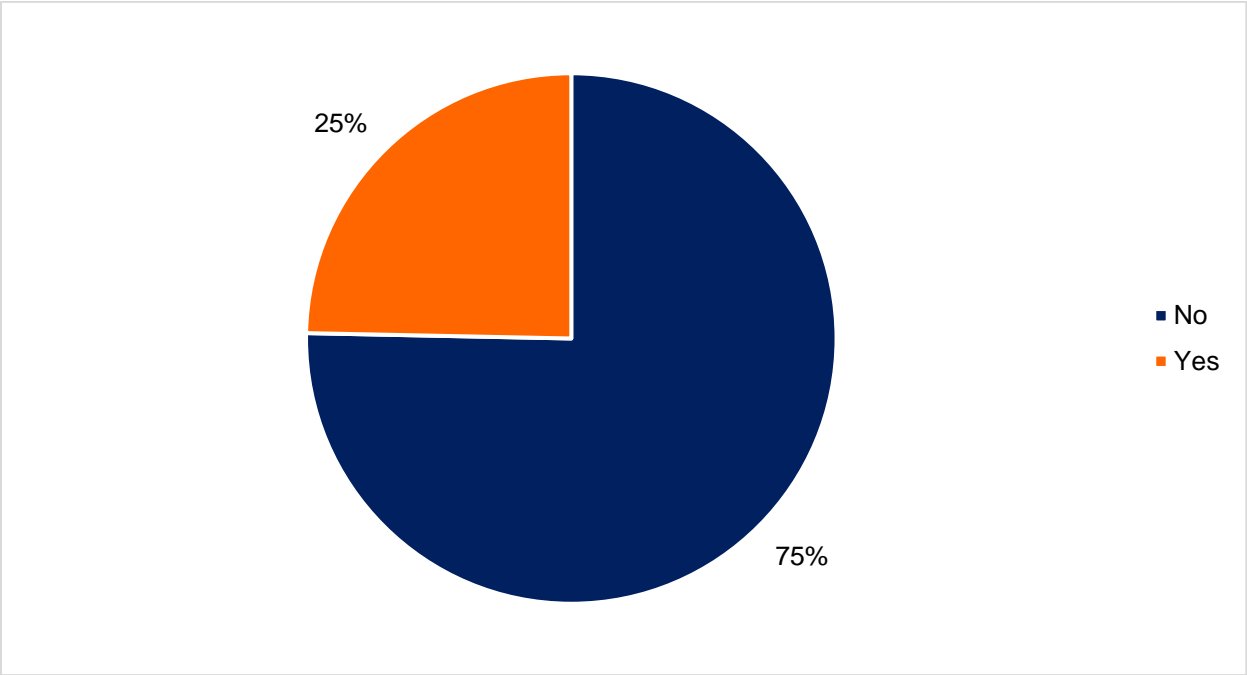
While only 17% of respondents said yes, 52% of correspondents said perhaps, depending on the content and other product cancellations. We took this as a sign that libraries do have some flexibility, but it is highly dependent on the content –they are willing to adjust their budget depending on how the content suits their institutional needs.

**Question 8: Do you believe that your library will have the fiscal capacity to support new OA content (a.k.a content that was not already included in the budget) between now and June 30th, 2022?**



As with the previous question, the majority of respondents said it depends on the content and other product cancellations, although it is notable that 14% said they do not financially support any OA initiatives.

**Question 9: Are there specific policies that dictate how the library spends year end money for collections and content?**



We asked this question because beyond fiscal flexibility, we wanted to know what policies dictate year-end money, since it would influence how we arrange our year-end deals. The vast majority of institutions do not appear to have policies that dictate how they spend their remaining budget. For those that do, we asked them to describe their policies. There were a

variety of answers, but the most common trend appeared to be a restriction of funds to one time use or use within the current fiscal year:

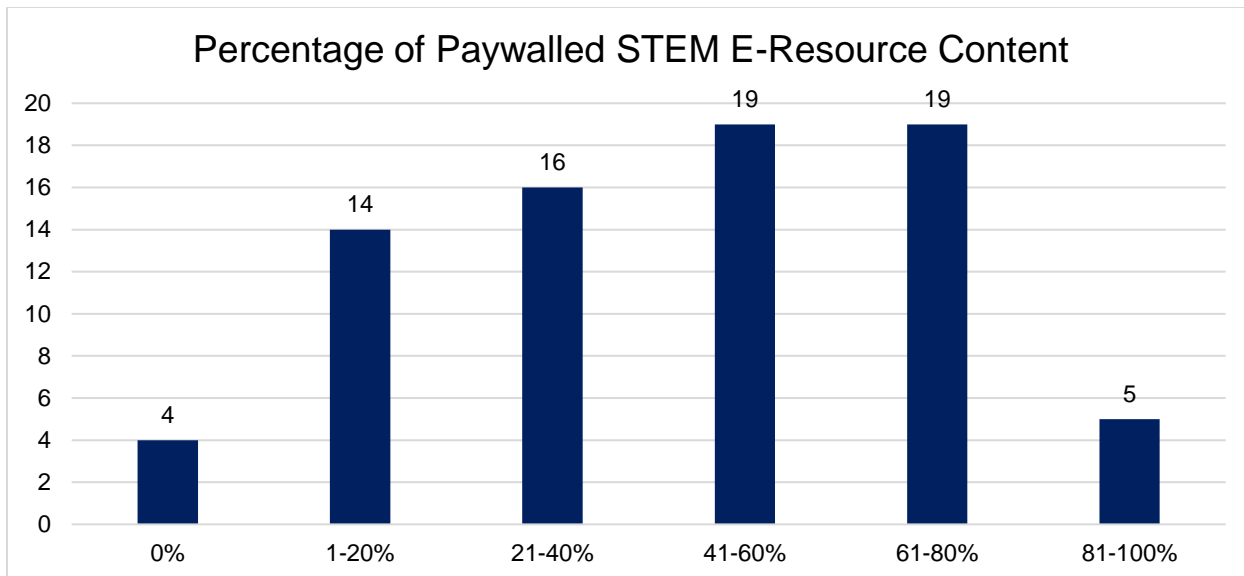
- *"Content must be "received" within the fiscal year. So for example, year-end funds cannot be used for a subscription that falls less than 50% in the ending fiscal year."*
- *"Everything needs to be purchased and received within the fiscal year. So, if we were to buy a year of electronic subscription the costs would be split across fiscal years in proportion to the amount used."*
- *"These purchases tend to be one-time only purchases and must be made available by June 30."*
- *"We work very hard to avoid a surge of EOY spending. One important policy is that we must receive and pay in the same FY -- i.e., we can't use EOY \$ to prepay invoices that come due in the next FY."*

The other smaller but more worrying trend involved returning or losing funds – the question did not permit asking the reason for this trend, although one possibility is that this might have been influenced by pandemic cost-cutting:

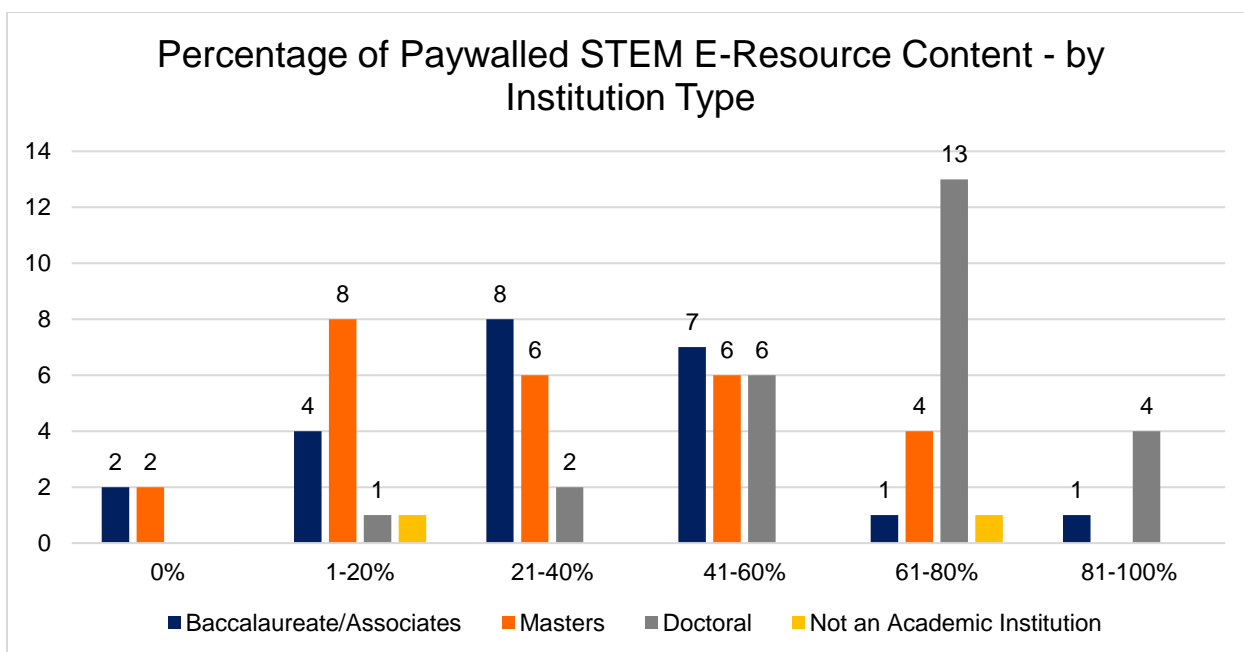
- *"Yes and no. In the past we have had great flexibility to use our operating funds within a given year, but last fiscal year the College asked us to give money back at end of year. We're not sure what will happen this year."*
- *"To say no would imply that we had options. I said Yes only to say - we haven't had one-time funds in 5 years and don't expect it - the university used to use the library as a place to sweep money to at the end of the year but they found another option and are no longer pushing money to us. I don't see that changing."*
- *"We lose those funds."*

## STEM CONTENT

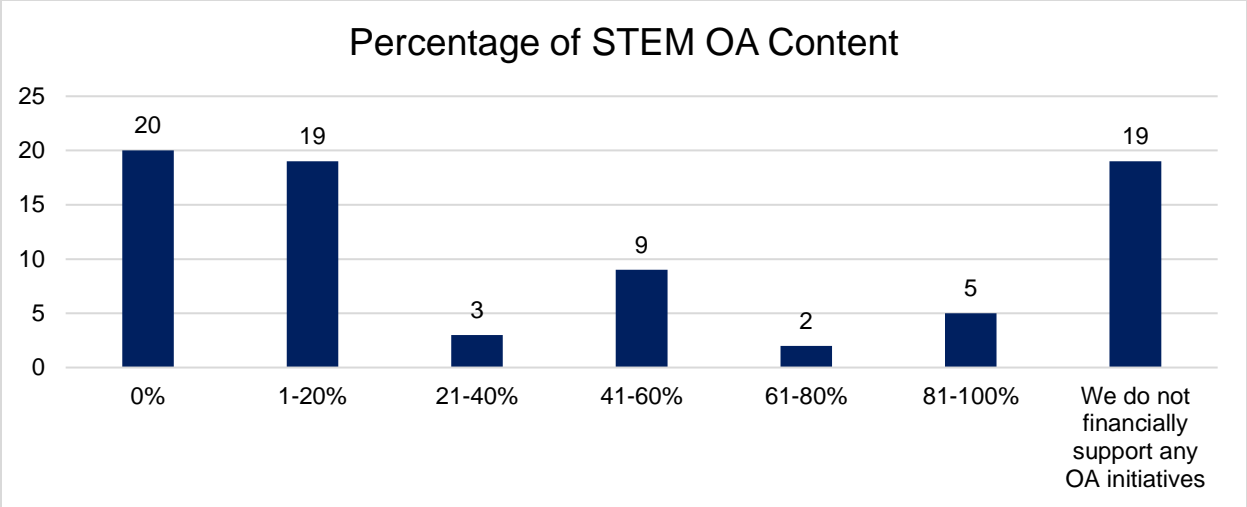
**Question 10: Approximately what portion of your library's paywalled electronic resource purchases are devoted to STEM (Science, Technology, Engineering and Math) content (as opposed to humanities, social sciences and arts content)?**



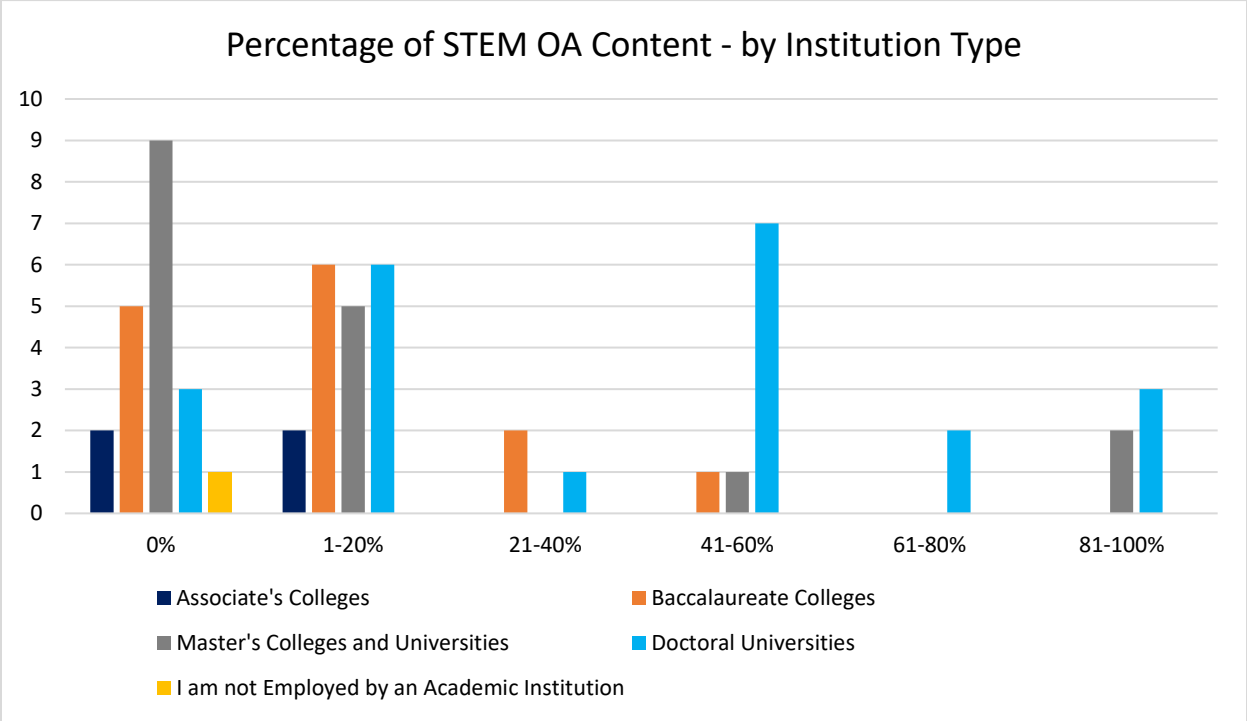
The results for paywalled content were spread fairly evenly amongst budgets in terms of STEM allocation. Undifferentiated, the results were not significant. When broken down by institution type, the baccalaureate/associates and masters institutions were still fairly spread out, but the doctoral institutions represented a higher investment in STEM materials than their counterparts.



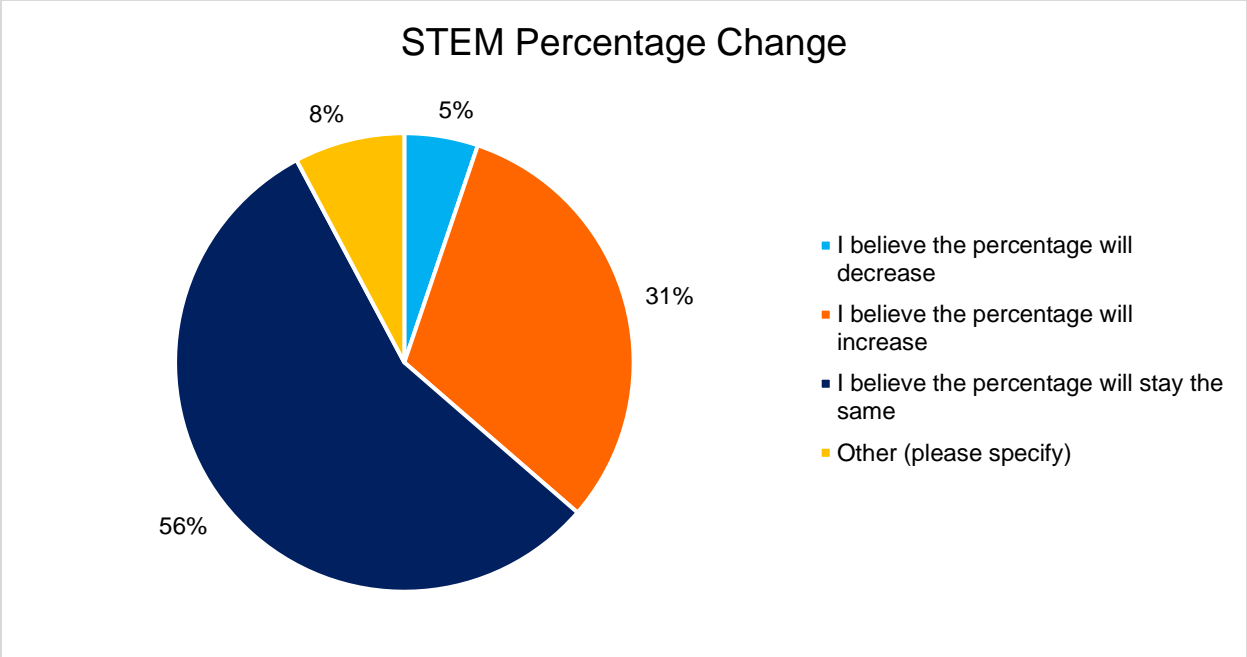
**Question 11: Approximately what portion of your library's OA financial support is devoted to STEM (Science, Technology, Engineering and Math) content (as opposed to humanities, social sciences and arts content)?**



The majority of respondents who do support OA content said they spend either no money on STEM OA, or less than 20% of their OA funding on STEM content. When broken down by institution type, there are some notable exceptions for higher OA STEM support amongst the doctoral universities.



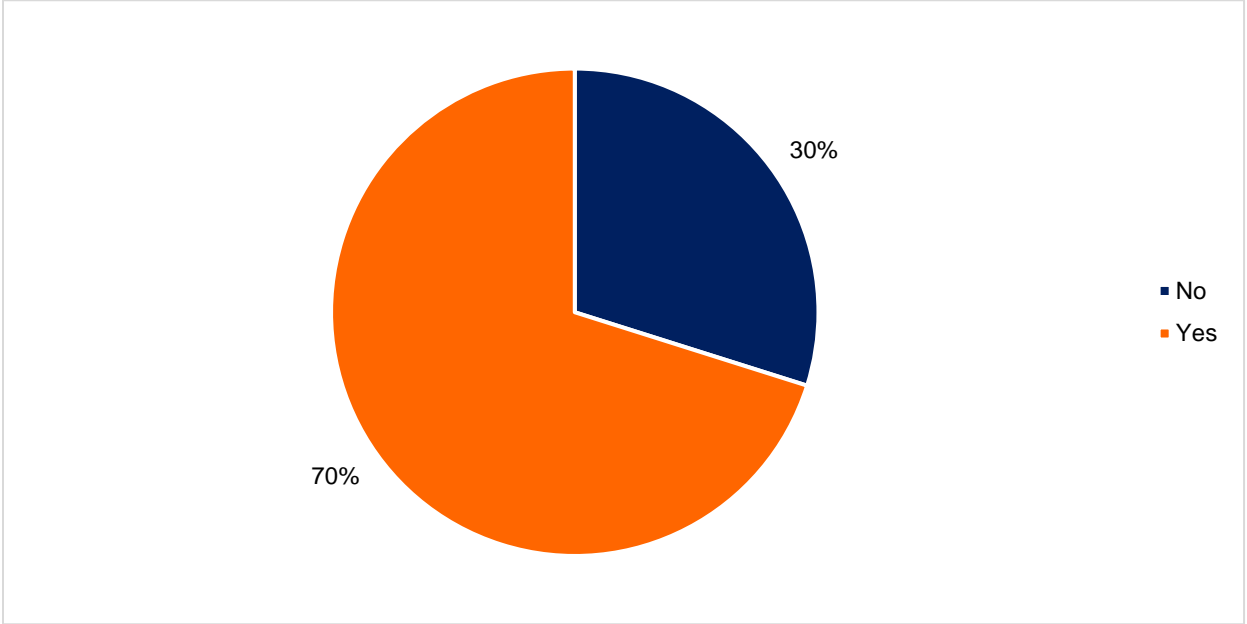
**Question 12: Do you believe that the percentage of collection money your library allocates to STEM content will change in the next few years?**



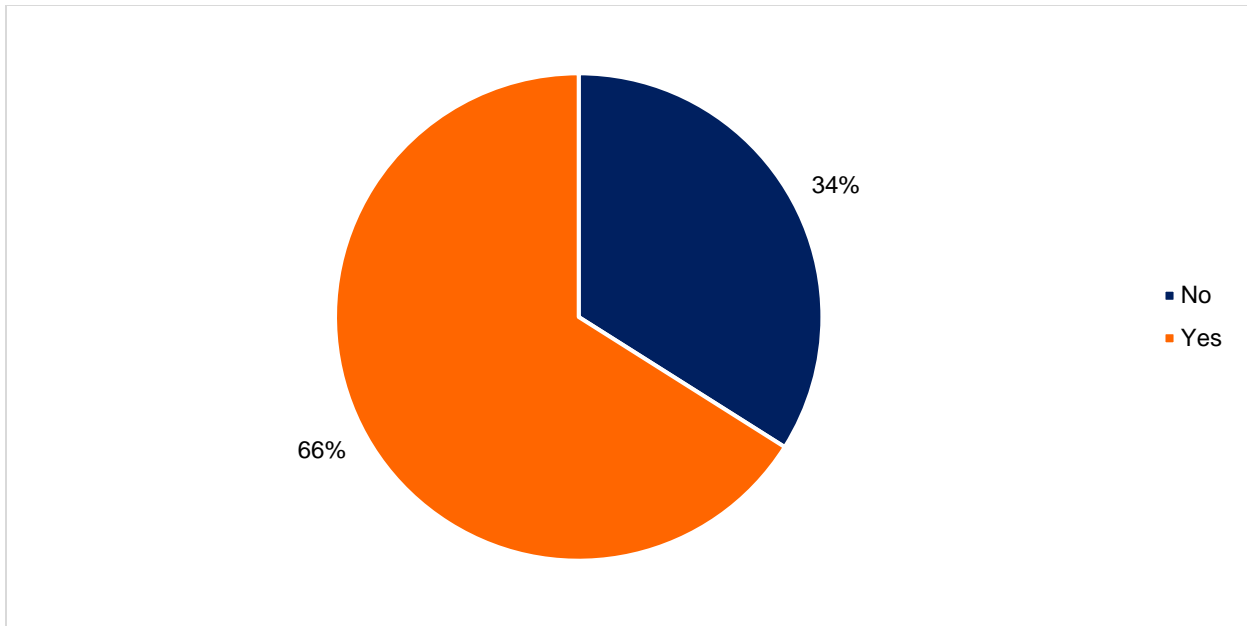
The majority of respondents believe the percentage will stay the same.

### PRINT TO ELECTRONIC FUNDING TRANSITION

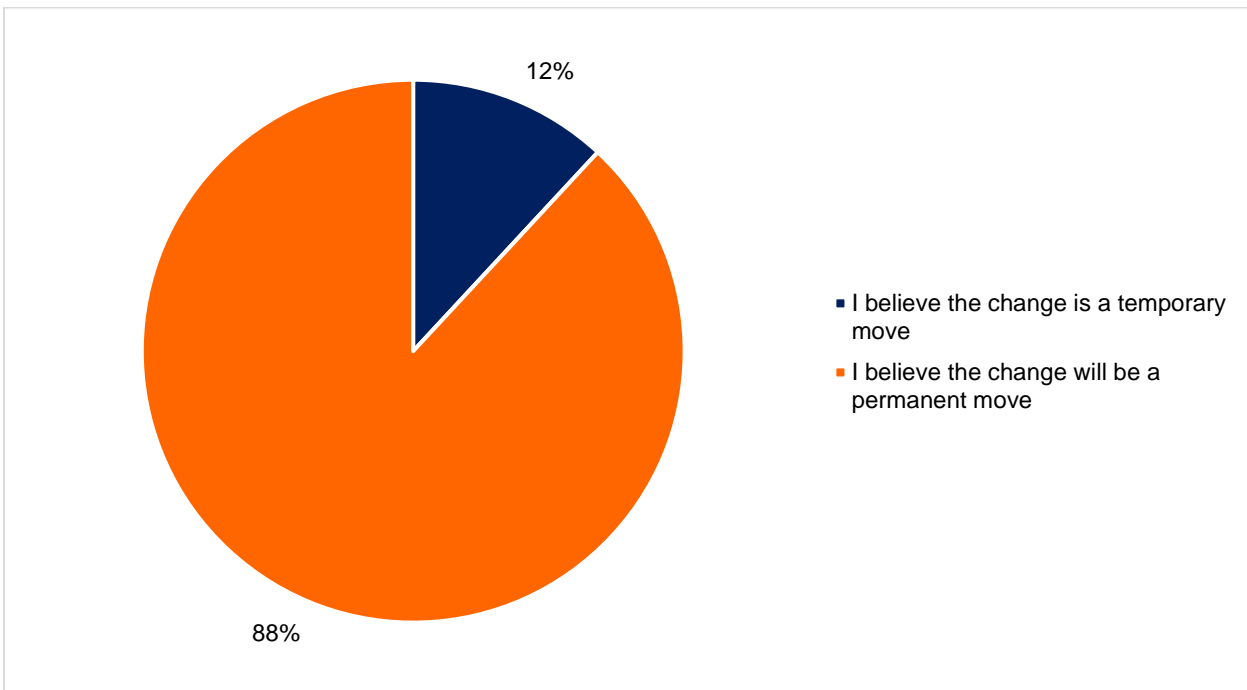
**Question 13: Since the previous fiscal year, has your library purposefully redirected money from print collections to electronic content?**



**Question 14: If you said yes to the previous question, would you say this decision was a direct response to changing needs during the pandemic?**



**Question 15: If you said yes to the previous question, do you believe this shift in funds from print to electronic is a permanent move, or do you anticipate returning the funds to the print collection budget in the future?**



Of the 66% of respondents who said their budget shifts from print to electronic were in direct response to the pandemic, the vast majority believed that the funds would permanently reside in electronic resources moving forward.



## Looking Ahead

While the findings in this survey were not necessarily surprising, they provided valuable insights for the CSCI team for their continuing work on scholarly content initiatives at LYRASIS.

The modest but definite growth in OA funding demonstrated in the survey responses is reflected by the growth in support for LYRASIS OA initiatives. We will continue to emphasize the development of new sustainable models for scholarly content, with a special focus on Open programs. A key element of our efforts will be to develop opportunities for institutions of all types and sizes to engage in our strategic work.

While STEM is important and valued in today's educational culture, it is not necessarily the predominant priority for our LYRASIS member institutions. We will continue to offer a mix of STEM and non-STEM content to our members, requiring the development of new business models to accommodate the needs of the various disciplines.

Perhaps the biggest takeaway from this survey is that content still reigns supreme in all decision making. Despite a difficult couple of years, there is still room for new content, paywalled or OA, if it fits the needs of our institutions. The type of content proves more important to institutions than the purchasing model, and there will be more digital content acquisition as most libraries have seen a permanent shift in funds from print to electronic resources.

Armed with these understandings, we look forward to continuing to serve our members and user communities well into the future.

## Acknowledgments

Authors of this report acknowledge the contributions of all participants in the survey, who were primarily contacted through our members-only scholarly communication listerv, LYROffers. For many years now we have been the beneficiaries of an active community of users willing to provide their feedback on a number of different issues. Without them, this survey would not have been possible.

# Appendix A – Original Survey Questions

1. Please indicate your institution's classification in the Carnegie Classification of Institutions of Higher Education (<https://carnegieclassifications.iu.edu/lookup/lookup.php>):
  - a. Doctoral University – Highest Research Activity (R1)
  - b. Doctoral University – Higher Research Activity (R2)
  - c. Doctoral University – Moderate Research Activity (R3)
  - d. Master's College and University: Larger programs (M1)
  - e. Master's College and University: Medium programs (M2)
  - f. Master's College and University: Smaller programs (M3)
  - g. Baccalaureate College—Arts & Sciences (259)
  - h. Baccalaureate College—Diverse Fields (324)
  - i. Baccalaureate/Associate's College: Associates Dominant (149)
  - j. Baccalaureate/Associate's College: Mixed Baccalaureate/Associate's (259)
  - k. Associate's Colleges: Mixed Transfer/Career & Technical-Mixed Traditional/Nontraditional
  - l. I am employed by an academic institution outside of the United States
  - m. I am not employed by an academic institution
2. My institution is a member of:
  - a. LYRISIS
  - b. Academic Libraries of Indiana
  - c. Maryland Digital Library
3. What is the approximate size of your electronic resources budget for the current year?
4. In the previous fiscal year, what percent of your electronic resources budget was spent in support of Open Access (OA) publishing (as opposed to paywalled content)?
  - a. 0%
  - b. 1-10%
  - c. 11-20%
  - d. Over 20%
5. In the current fiscal year, what percent of your electronic resources budget do you plan on spending in support of OA publishing (as opposed to paywalled content)?
  - a. 0%
  - b. 1-10%
  - c. 11-20%
  - d. Over 20%
6. Are there campus funds other than the library's electronic resources budget that are used to support OA publishing? Please select all that apply.
  - a. Yes, other funding sources within the library
  - b. Yes, other funding sources within the institution
  - c. No
  - d. The institution does not support OA publishing
7. If you said yes in the previous question, could you please describe the other funding sources?
8. When acquiring paywalled electronic resources and given an option, do you prefer an annual subscription model (the library pays a regular fee to continue accessing content without ownership) or a perpetual rights access model (the library purchases the right to the content in perpetuity, and can either provide its own access to the content or pay a platform fee to display the content)?

- a. Annual subscription model
  - b. Perpetual rights model
  - c. It depends on the content
9. Do you believe that your library will have the fiscal capacity to add new paywalled content (a.k.a content not already included in the budget) to its collection between now and June 30<sup>th</sup>, 2022?
- a. Yes
  - b. No
  - c. Perhaps, depending on the content and other product cancellations
10. Do you believe that your library will have the fiscal capacity to support new OA content (a.k.a. content that was not already included in the budget) between now and June 30<sup>th</sup>, 2022?
- a. Yes
  - b. No
  - c. Perhaps, depending on the content and other product cancellations
  - d. We do not financially support any OA initiatives
11. Are there specific policies that dictate how the library spends year end money for collections and content?
- a. Yes
  - b. No
12. Of you said yes, could you please describe your policies?
13. Approximately what portion of your library's paywalled electronic resource purchases are devoted to STEM (Science, Technology, Engineering and Math) content (as opposed to humanities, social sciences and arts content)?
- a. 0%
  - b. 1-20%
  - c. 21-40%
  - d. 41-60%
  - e. 61-80%
  - f. 81-100%
14. Approximately what portion of your library's OA financial support is devoted to STEM (Science, Technology, Engineering and Math) content (as opposed to humanities, social sciences and arts content)?
- a. 0%
  - b. 1-20%
  - c. 21-40%
  - d. 41-60%
  - e. 61-80%
  - f. 81-100%
15. Do you believe that the percentage of collection money your library allocates to STEM content will change in the next few years?
- a. I believe the percentage will increase
  - b. I believe the percentage will decrease
  - c. I believe the percentage will stay the same
  - d. Other (please specify)
16. Since the previous fiscal year, has your library purposefully redirected money from print collections to electronic content?
- a. Yes
  - b. No
17. If you said yes to question 16, would you say this decision was a direct response to changing needs during the pandemic? If you said no, please skip this question.

- a. Yes
  - b. No
18. If you said yes to question 17, do you believe this shift in funds from print to electronic is a permanent move, or do you anticipate returning the funds to the print collection in the future? If you said no, please skip this question.
- a. I believe the change will be a permanent move
  - b. I believe the change is a temporary move