



LIBRARIES ACHIEVE EQUILIBRIUM BETWEEN DIGITAL AND PRINT AS BUDGETS FLOUNDER

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY
ON 2016 ACADEMIC LIBRARY SPENDING PLANS

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HIGHLIGHTS

This new study of 324 academic library managers and librarians was conducted by the *Library Resource Guide (LRG)*—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, which was administered in the September–November 2015 time period among libraries listed in ITI’s *American Library Directory*, reveals current spending patterns for public, academic, government, and special libraries, and provides projections for budgets and spending trends for 2016. This report is a subset of a larger study, which covered a total of 827 libraries, including academic, special, and government agency libraries, along with public libraries.

A total of 68% of respondents to the survey represent 4-year and post-graduate institutions, and another 19% are with 2-year or associates’ degree-granting institutions. In addition, 12% are library managers or librarians with “special-focus institutions,” organized around faith, medical, health, engineering, technology, business, arts, law, or other specialties. More than half are publicly supported institutions, and 38% are not-for-profit private schools.

Twenty-six percent of respondents are librarians of all kinds, and 22% are director and administrators. Close to one-third, 30%, serve full-time student populations of fewer than 2,500 constituents, and 25% serve between 2,500 and 5,000 students. Another 19% serve between 5,000 and 10,000 students, while 23% are at institutions of more than 10,000. (For detailed demographic breakdowns, see Figures 34–38 at the end of this report.)

Key findings from the survey include the following:

- Academic library budgets have been either stagnant or declining in recent years, as institutions seek to redefine and re-orient the roles of their on-campus libraries. Half of all spending now goes to digital materials and services (online databases and ebooks). Only one in three content acquisitions is for print material (printed books and print periodicals), a share that continues to decline.
- Academic libraries are almost entirely digital at this stage. Three-fourths of academic library managers report increased demand for electronic materials, compared to only 19% seeing demand for more print. A majority of academic library managers report that most spending is devoted to digitizing their offerings and services. Most are also re-orienting technology to the cloud. More than one-third of the larger institutions now have 3D printing or makerspace facilities on their premises.
- For academic libraries, tight budgets represent the greatest challenge going forward. Academic library budgets have been shrinking, and library managers are increasingly forced to provide more services for less. Although budgets may be tight, many of these managers are concerned with their ability to keep or attract the talent needed to move their libraries full-throttle into the digital era.

On the following pages are the results of the survey, reflecting the balance today’s libraries are striving to achieve.

ACADEMIC LIBRARY FINANCES: THE PICTURE TIGHTENS

Academic library budgets have been either stagnant or declining in recent years, as institutions seek to redefine and re-orient the roles of their on-campus libraries. Half of all spending now goes to digital materials and services (online databases and ebooks). Only one in three content acquisitions is for print material (printed books and print periodicals), a share that continues to decline.

A majority of library managers and librarians, 87%, report they have deciding roles in their libraries' budgets—either direct authority of entire budgets, or overseeing specific line items. (See Figure 1.)

Academic library budgets have been stagnant in recent years, with many even reporting reduced spending. The survey captured library budget information in two ways—through ranges, and by reporting specific data that is averaged in this report. In terms of ranges, overall, 36% of academic libraries in the survey report having annual budgets of at least \$1 million a year. This is relatively unchanged from last year's survey, but is still down from 39% in 2011, the first year this survey was conducted. (See Figure 2.) In terms of averages, academic library budgets continue to lose ground. Reported budgets for single, standalone academic libraries averaged \$1.2 million a year, down close to 4% since last year, and relatively unchanged since the first survey 5 years ago. Libraries that are part of larger academic systems also had average budgets of about \$1.2 million, a decline from previous years. (See Figure 3.)

Of course, these budget averages vary greatly by size of library—with libraries at large campuses having the most substantial budgets. Those on campuses with fewer than 2,500 full-time students had average annual budgets of about \$600,000, compared to libraries at institutions with more than 10,000 students, which average close to \$5 million a year. (See Figure 4.)

The largest portion of academic library spending is personnel and staffing, consuming an average of 42% of 2016 budgets, the survey finds. Another one-third of budgets goes to content acquisition, and more than one in 10 dollars spent goes to systems and computers. These ratios have remained relatively unchanged over the 5 years this survey has been conducted. (See Figure 5.)

In terms of how content acquisition budgets are allocated, half of all spending now goes to digital-related materials and services (online databases and ebooks). Another 36% of content acquisitions is for print material (printed books and print periodicals), a share that continues to decline. Last year, an average of 39% of academic library acquisitions were for print compared to 48% in 2011, the first year of the survey. (See Figure 6.) The

march toward digital acquisitions is much more pronounced among large institutions—62% of the budgets of institutions with more than 10,000 students goes to digital materials, versus 46% of the budgets of smaller campuses. (See Figure 7.)

The stagnation of academic library budgets is reflected in the rate of current and anticipated increases in budgets, the survey shows. This year, only 29% of respondents reported annual budget increases, down from 38% a year ago. In the year ahead, only 23% anticipate increases, while 40% expect a downturn in their spending capabilities. (See Figure 8.)

Budget cutbacks are being seen across a range of academic library functions and services. More than half cut their spending on print subscriptions, up from 47% a year ago. Close to one-third of respondents are even scaling back on online subscriptions, up from 20% last year. Another 29% report layoffs or staff hours being cut, also up from 20%. (See Figure 9.)

The pain of print cutbacks is most acutely felt among smaller institutions' libraries, but cuts in staff hours and online subscriptions are being most acutely felt among the larger libraries. (See Figure 10.)

Of course, there's more to the story than cutbacks—many academic libraries have been scaling up functions and services in various areas, as well. Two in five are increasing the online subscription offerings—up from one-third a year ago. Twenty-eight percent report ramping up ebook offerings, though this is down from a peak of 44% 2 years ago and 36% last year. The percentage of academic libraries boosting digital content collections is also on the rise, from 17% last year to 25% in the current survey. (See Figure 11.) Larger institutions are more likely to be boosting their offerings in these areas. (See Figure 12.)

Where are budget dollars coming from? For the most part, as indicated by more than three in four library managers, the funds flow directly from their institutions. Close to half say they receive support from their state governments, while close to one in four also relies on gifts and donations. There has also been a surge in public funding from federal sources. (See Figure 13.)

Figure 1: Respondents' Roles in Managing Academic Library Budgets

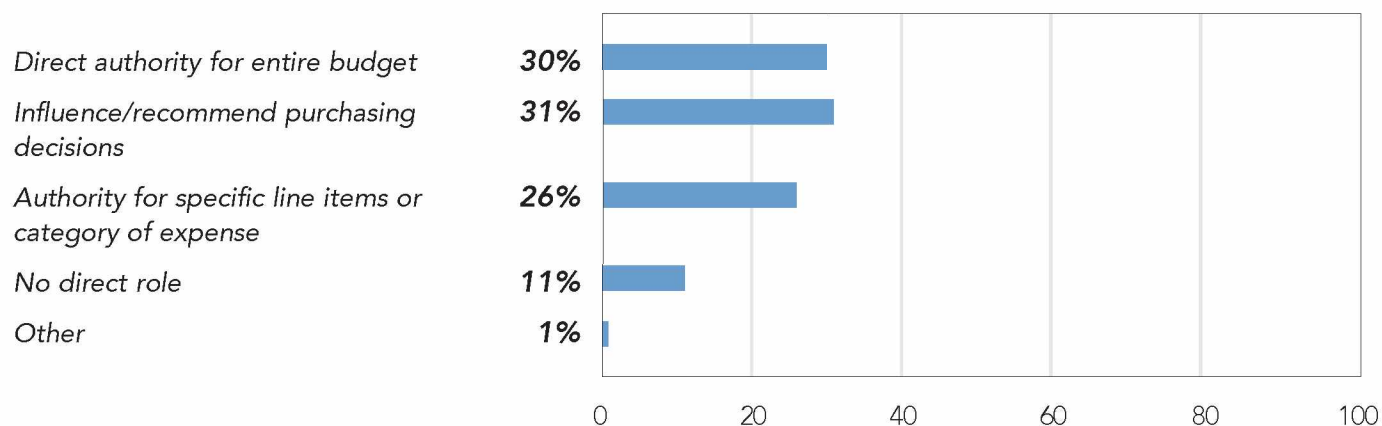


Figure 2: Annual Academic Library Budget Ranges

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Less than \$100,000	—	6%	7%	9%	9%
\$100,000 to \$500,000	36%*	29%	27%	27%	30%
\$500,000 to \$1,000,000	15%	13%	20%	20%	15%
\$1 million to \$3 million	25%	22%	21%	21%	20%
\$3 million to \$5 million	7%	10%	9%	6%	10%
More than \$5 million	7%	8%	9%	7%	6%
Don't know/unsure	10%	11%	8%	9%	12%

*Reported category was "less than \$500,000" in 2011 survey.

Figure 3: Average Budgets—By Library Structure and Segment

SINGLE, INDEPENDENT OR STANDALONE LIBRARIES

	2011	2012	2013	2015	2016	% CHANGE
Academic	\$1,252,232	\$1,256,170	\$1,327,402	\$1,257,336	\$1,211,674	-3.6%

SINGLE LIBRARIES WITHIN A MULTI-BRANCH/MULTI-CAMPUS SYSTEM

Academic	—	\$1,815,985	\$1,642,171	\$1,553,125	\$1,218,570	-21.5%
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Figure 4: Academic Library Budgets—By Full-Time Enrollment

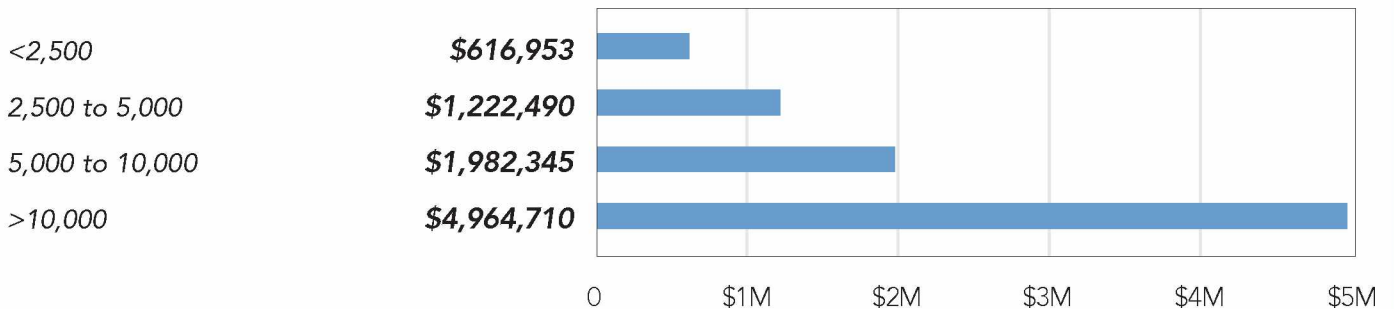


Figure 5: Allocation of Academic Library Budgets

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Personnel/staffing	43%	51%	46%	41%	42%
Content acquisitions/collection development	34%	30%	31%	37%	31%
Library systems, computers, A/V, media equipment, software/services	11%	9%	10%	11%	12%
Operations/facilities	6%	6%	8%	7%	7%
Other	5%	3%	5%	3%	3%

(Totals may not equal 100% due to rounding.)

Figure 6: Allocation of Academic Library Content Acquisitions Budgets

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Online databases, digital content collections	35%	40%	40%	43%	43%
Ebooks	4%	4%	6%	7%	7%
Printed books & other printed materials	25%	25%	25%	20%	19%
Serials/periodicals (print)	23%	22%	19%	19%	17%
Media titles (video, audio, computer-based modules, etc.)	5%	4%	4%	4%	5%
Special programs	2%	1%	3%	2%	1%
Other (microforms, manuscripts, archives, preservation, etc.)	2%	2%	1%	2%	2%
All other categories	4%	2%	3%	2%	1%

Figure 7: Allocation of Academic Library Content Acquisitions —By Full-Time Enrollments

	<2.5K	2.5K–5K	5K–10K	>10K
Online databases, digital content collections	38%	40%	44%	55%
Ebooks	8%	5%	9%	7%
Printed books & other printed materials	28%	13%	14%	14%
Serials/Periodicals (print)	19%	18%	16%	11%
Media titles (video, audio, computer-based modules)	5%	3%	6%	4%
Special programs	1%	2%	1%	1%
Other (microforms, manuscripts, archives, preservation)	1%	1%	2%	2%
All other categories	1%	1%	2%	1%

(Totals may not equal 100% due to rounding.)

Figure 8: Changes in Overall Academic Library Budgets

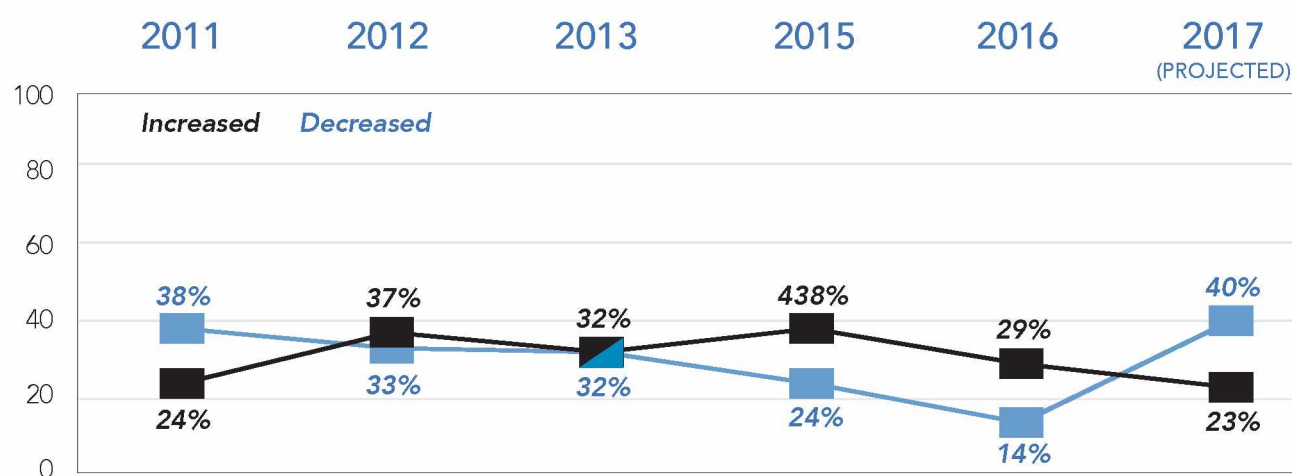


Figure 9: Actions Taken by Academic Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Cut spending on print subscriptions	55%	52%	60%	47%	52%
Cut spending on online subscriptions	—	24%	30%	20%	31%
Staff layoffs/staff hours cut	22%	24%	29%	20%	29%
Cut or eliminated conference/travel/education budget	48%	30%	35%	31%	27%
Salary freezes	41%	31%	40%	20%	27%
Renegotiated contracts with vendors	23%	12%	20%	21%	25%
Lobbied for more funding from institutions	17%	14%	11%	11%	19%
Reduced library hours	18%	11%	16%	12%	16%
Applied for more grants	14%	11%	15%	14%	15%
Moved more services/materials online	33%	30%	30%	28%	15%
Collaborated/shared with other libraries/joined consortia	19%	18%	12%	12%	14%
Consolidated departments	13%	11%	15%	11%	13%
Reduced IT expenditures	9%	11%	9%	11%	10%
Reduced programming	6%	5%	9%	6%	9%
Added volunteers	6%	7%	6%	7%	8%
Closed facilities	2%	2%	0%	1%	0%
Don't know/unsure	6%	2%	2%	8%	13%
Other	6%	9%	7%	3%	7%
No cuts/budget freezes over past year	14%	21%	10%	20%	12%

(Multiple responses permitted.)

Figure 10: Actions Taken by Academic Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year—By Population Sized Served

	<2.5K	2.5K–5K	5K–10K	>10K
<i>Cut spending on print subscriptions</i>	62%	40%	45%	52%
<i>Cut spending on online subscriptions</i>	23%	25%	45%	35%
<i>Staff layoffs/staff hours cut</i>	23%	30%	32%	35%
<i>Cut or eliminated conference/travel/education budget</i>	31%	20%	23%	20%
<i>Applied for more grants</i>	13%	15%	27%	9%
<i>Added volunteers</i>	3%	10%	14%	9%
<i>Salary freezes</i>	31%	20%	36%	17%
<i>Reduced IT expenditures</i>	8%	0%	18%	13%
<i>Reduced programming</i>	8%	20%	5%	4%
<i>Renegotiated contracts with vendors</i>	21%	10%	32%	39%
<i>Lobbied for more funding from institutions</i>	8%	15%	23%	39%
<i>Collaborated/shared with other libraries/joined consortia</i>	13%	10%	14%	22%
<i>Reduced library hours</i>	23%	20%	5%	13%
<i>Moved more services/materials online</i>	18%	10%	18%	13%
<i>Consolidated departments</i>	8%	20%	23%	9%
<i>Closed facilities</i>	0%	0%	0%	0%
<i>Don't know/unsure</i>	13%	5%	18%	17%
<i>Other</i>	7%	0%	4%	17%
<i>No cuts/budget freezes over past year</i>	10%	20%	0%	17%

(Multiple responses permitted.)

Figure 11: Areas Seeing Increased Spending or Support in Academic Libraries Over the Past Year

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Online subscriptions acquisitions	30%	44%	36%	33%	40%
Ebooks	22%	34%	44%	36%	28%
Digital content collections/services	16%	19%	19%	17%	25%
Personnel	12%	16%	14%	17%	23%
Library technology equipment, software	10%	15%	11%	13%	23%
Periodicals/serials acquisitions	6%	8%	9%	8%	12%
3D printing facilities/makerspaces or labs	—	—	1%	2%	11%
Multimedia/streaming media	11%	8%	15%	9%	11%
Library hours/availability	5%	6%	12%	6%	10%
Cloud-based solutions	1%	8%	4%	9%	9%
Facilities upgrades/maintenance	5%	7%	4%	8%	7%
Book acquisitions	6%	10%	7%	7%	7%
IT services	2%	4%	4%	6%	4%
Operations	3%	7%	1%	4%	5%
Print subscription acquisitions	3%	3%	3%		
Special career or business development assistance programs	—	—	—	1%	0%
Other	2%	6%	1%	3%	5%
Don't know/unsure	10%	5%	6%	10%	9%
No areas seeing increased spending/support	28%	24%	21%	23%	12%

(Multiple responses permitted.)

Figure 12: Areas Seeing Increased Spending or Support in Academic Libraries Over the Past Year—By Full-Time Enrollment

(Includes all costs, including operations, acquisitions, and staffing.)

	<2.5K	2.5K–5K	5K–10K	>10K
Online subscriptions acquisitions	43%	40%	26%	48%
Ebooks	27%	20%	37%	36%
Digital content collections/services	14%	30%	32%	35%
Personnel	30%	10%	21%	26%
Library technology equipment, software	27%	15%	21%	26%
IT services	8%	0%	0%	4%
Operations	0%	5%	16%	4%
Book acquisitions	16%	5%	0%	0%
Facilities upgrades/maintenance	3%	0%	16%	13%
Multimedia/streaming media	3%	10%	11%	26%
Cloud-based solutions	14%	5%	5%	9%
3D printing facilities/makerspaces or labs	0%	15%	16%	22%
Special career/development assistance programs	0%	0%	0%	0%
Print subscription acquisitions	0%	0%	5%	9%
Periodicals/serials acquisitions	8%	15%	21%	9%
Library hours/availability	8%	5%	26%	4%
Other	8%	0%	5%	4%
Don't know/unsure	8%	5%	11%	13%
No areas seeing increased spending/support	14%	15%	11%	9%

(Multiple responses permitted.)

Figure 13: Primary Sources of Academic Library Funding

	2011	2012	2013	2015	2016
<i>University/school tuition funding</i>	78%	82%	74%	76%	77%
<i>Public funding—state</i>	33%	46%	40%	34%	46%
<i>Gifts and donations</i>	19%	25%	23%	26%	22%
<i>Public funding—federal</i>	5%	10%	11%	11%	15%
<i>Endowments</i>	17%	24%	12%	16%	14%
<i>Grants</i>	8%	15%	10%	12%	12%
<i>IT fees</i>	—	6%	2%	3%	9%
<i>Public funding—local</i>	8%	11%	11%	6%	8%
<i>Special fundraising events</i>	2%	2%	2%	3%	4%
<i>Fee-based services</i>	2%	6%	5%	3%	3%
<i>Corporate funding</i>	—	—	2%	2%	2%
<i>Don't know/unsure</i>	3%	4%	3%	5%	8%
<i>Other</i>	1%	5%	2%	2%	0%

(Multiple responses permitted.)

DIGITAL LIBRARY TRENDS

Academic libraries are almost entirely digital at this stage. Three-fourths of academic library managers report increased demand for electronic materials, compared to only 19% seeing demand for more print. A majority of academic library managers report that most spending is devoted to digitizing their offerings and services. Most are also re-orienting technology to the cloud. More than one-third of the larger institutions now have 3D printing or makerspace facilities on their premises.

For libraries in today's academic settings, electronic and digital are essential. Three-fourths of academic library managers report increased demand for electronic materials, compared to only 19% seeing demand for more print. (See Figure 14.)

Ebooks still top the list of patron requests in today's academic libraries, though this appears to have already peaked. Fifty percent of academic library managers report that ebooks have been the item of choice sought by patrons, down from 62% a year ago, and 70% in the 2013 survey. Wireless access is also still a key benefit being delivered, along with computer web access. With the increase in wireless access across campuses, as well as increased use of smartphones and mobile devices, fewer students, faculty, and staff are turning to their campus libraries for computer needs. What has been rising in popularity has been streaming media offerings through campus libraries (up from 34% to 39%) and 3D printing facilities (rising from 5% to 12% over the past year). (See Figure 15.) Most of these requirements have been seen across all campuses covered in the survey, regardless of student population. Demand for 3D printing facilities is most pronounced among larger institutions. (See Figure 16.)

For most academic libraries, the majority of their acquisition spending now goes to electronic resources. Fifty-five percent of managers report that most spending is devoted to digitizing their offerings and services. This is the first year this number topped the 50% mark—in 2011, the first year of the survey series, only 34% devoted most of their acquisition budgets to electronic resources. (See Figure 17.) The highest levels of spending for electronic resources takes place among libraries at mid-sized academic institutions, with full-time student populations of between 2,500 and 5,000. (See Figure 18.)

Interestingly, while academic libraries are clearly going all-digital, spending on information technology equipment, software, and services has been moderating, in line with the reduced budget expectations seen in the survey. Only 28% are increasing their IT budgets, down from 40% a year ago. IT spending will also be flat

in the year ahead. (See Figure 19.) However, spending for online subscriptions continues at a strong pace, as cited by 50%, with little let-up expected in the coming year. (See Figure 20.)

Cloud computing is another approach that is reshaping the way academic libraries manage and deliver services. Currently, 52% are either already using cloud services or making preparations to do so in the near future. This is about the same as last year, reflecting the widespread adoption of this kind of computing. (See Figure 21.) In most cases, these investments are for IT infrastructure, handling storage or processing in the cloud. There is also adoption of cloud-based services to enable better communications and collaboration. (See Figure 22.)

There are a variety of technology platforms and tools now in use at academic libraries. Online library catalogs are in use within close to nine out of 10 libraries, and integrated library systems (ILSs) are seen in almost as many, serving as electronic systems of record for collections and resources. Wireless networks are also prevalent, seen at 69% of sites, as are PC and device for patron use (68%). The use of 3D printing or makerspace offerings is now seen in 17% of academic libraries, up more than three-fold from last year's survey. (See Figure 23.)

Adoption of many of these leading solutions or platforms is common across all sizes of libraries. Interestingly, more than one-third of the larger institutions now have 3D printing or makerspace facilities on their premises. (See Figure 24.)

Discovery services is a high priority in academic library purchasing plans for the year ahead. Close to one-third of academic library managers indicate they will be adopting discovery services and associated tools, topping the 2016 library shopping list. Another 19% will also be purchasing 3D printers and makerspace materials, up from 14% the previous year. (See Figure 25.) Public social networking platforms—such as Facebook, LinkedIn, and Twitter—are in use at close to three-fourths of academic libraries, the survey finds. (See Figure 26.)

Figure 14: Change in Demand for Academic Library Print and Electronic Offerings

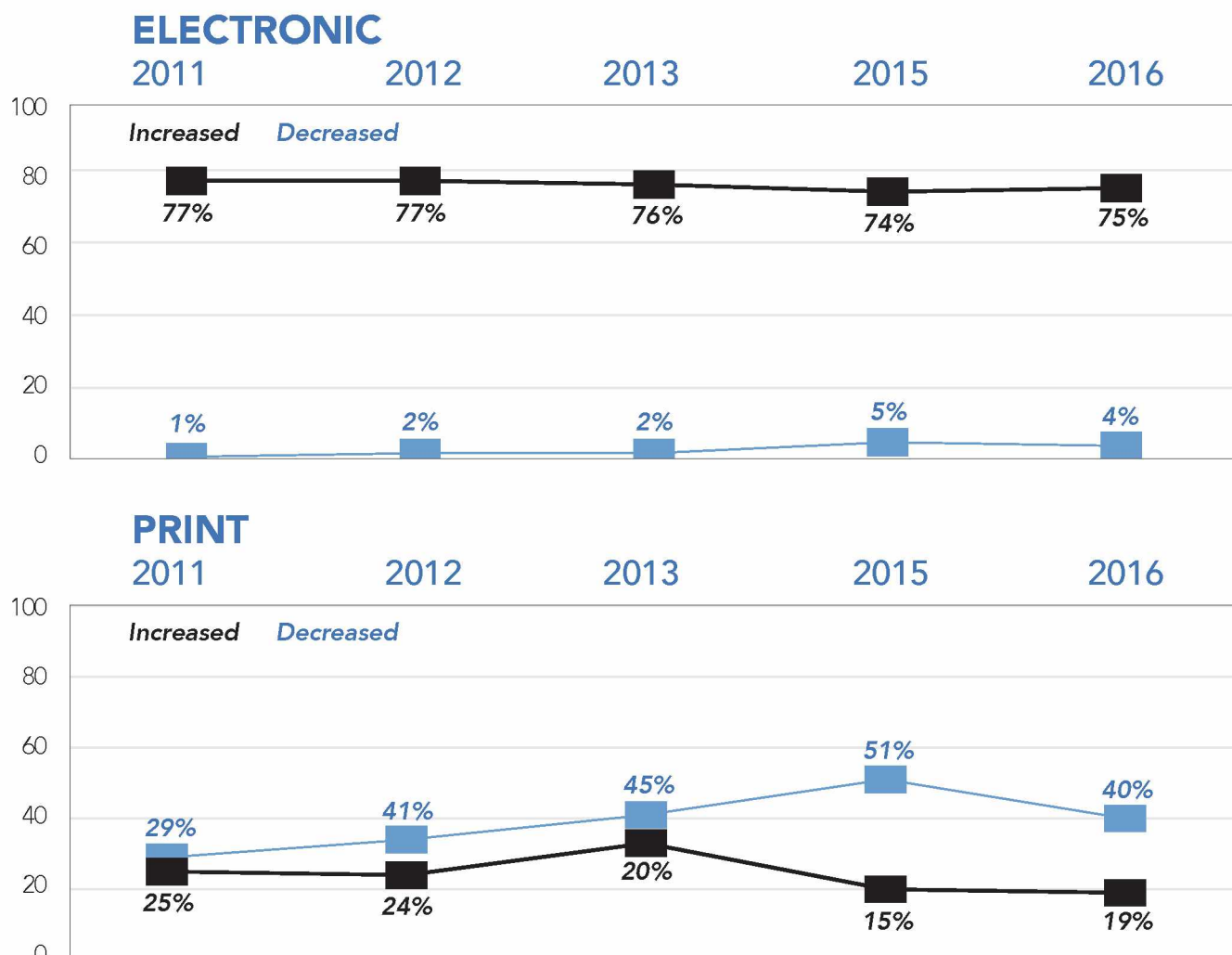


Figure 15: What Academic Library Patrons Have Been Requesting Over the Past Year

	2011	2012	2013	2015	2016
Ebooks	44%	60%	70%	62%	50%
Wireless access	72%	70%	55%	58%	49%
Computer/web access	56%	66%	61%	53%	39%
Streaming media	30%	36%	36%	34%	39%
Technical information/training	26%	32%	25%	25%	21%
Support for online education/MOOCs	—	—	27%	23%	21%
Medical	18%	21%	20%	10%	13%
3D printing/makerspaces or labs	—	—	1%	5%	12%
Job search/career development information	11%	12%	16%	10%	9%
Primary and continuing education programs/reqs.	8%	10%	8%	12%	6%
English language instruction	7%	6%	4%	9%	4%
Audiobooks	11%	12%	10%	7%	8%
Computer games/simulations	7%	6%	5%	6%	6%
Don't know/unsure	10%	10%	7%	9%	12%
Other	4%	2%	3%	2%	3%

(Multiple responses permitted.)

Figure 16: What Academic Library Patrons Have Been Requesting Over the Past Year—By Full-Time Enrollment

(Includes all costs, including operations, acquisitions, and staffing.)

	<2.5K	2.5K–5K	5K–10K	>10K
Ebooks	45%	53%	56%	49%
Wireless access	50%	47%	56%	43%
Computer/web access	50%	36%	33%	32%
Job search/career development information	9%	3%	22%	5%
Audiobooks	7%	8%	4%	8%
Technical information/training	20%	11%	19%	32%
Support for online education/MOOCs	16%	17%	26%	27%
Computer games/simulations	2%	3%	4%	14%
Streaming media	32%	31%	48%	46%
English language instruction	0%	6%	7%	5%
Primary and continuing education programs/reqs.	9%	0%	7%	5%
Medical	14%	22%	0%	14%
3D printing/makerspaces or labs	0%	8%	15%	24%
Don't know/unsure	16%	14%	0%	14%
Other	2%	0%	7%	5%

(Multiple responses permitted.)

Figure 17: Percentage of Acquisitions Budgets Spent on Electronic Resources

	2011	2012	2013	2015	2016
<10%	8%	7%	5%	7%	5%
11% to 25%	10%	11%	14%	13%	9%
26% to 50%	25%	26%	21%	22%	16%
>50%	34%	39%	43%	48%	55%
Don't know/unsure	23%	20%	16%	12%	26%

Figure 18: Percentage of Academic Library Acquisitions Budgets Spent on Electronic Resources—By Full-Time Enrollment

	<2.5K	2.5K–5K	5K–10K	>10K
<10%	11%	3%	4%	0%
11% to 25%	18%	3%	4%	6%
26% to 50%	28%	15%	24%	3%
>50%	29%	58%	48%	47%
Don't know/unsure	18%	21%	20%	4%

(Totals may not equal 100% due to rounding.)

Figure 19: Change in Library Spending on Information Technology Hardware, Software and Related IT Services

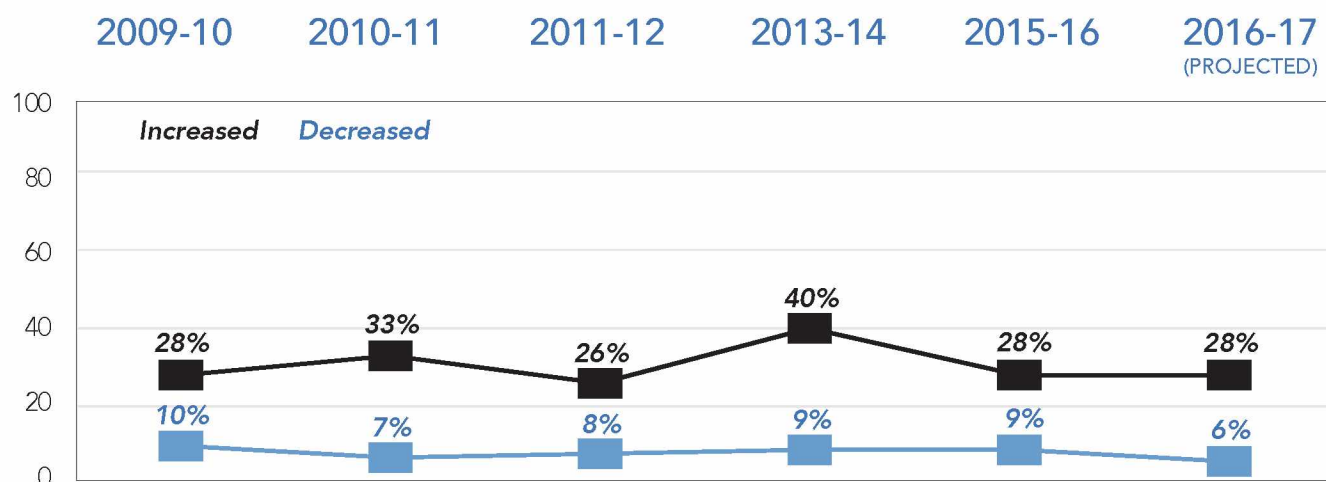


Figure 20: Change in Library Spending on Online Subscriptions

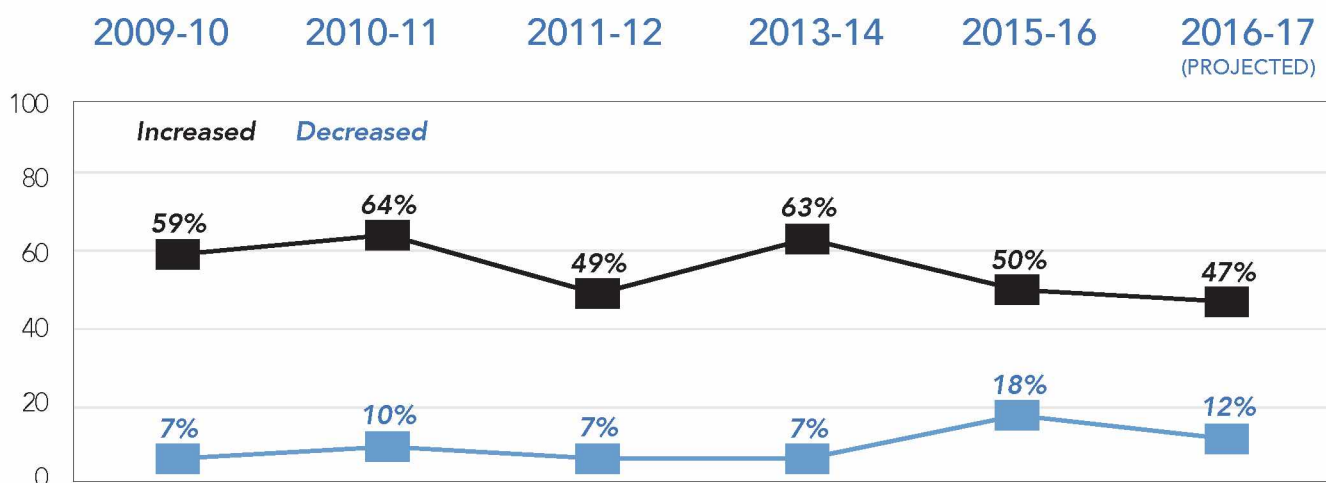


Figure 21: Percentage of Academic Libraries Currently Using or Planning to Use Cloud Computing Resources

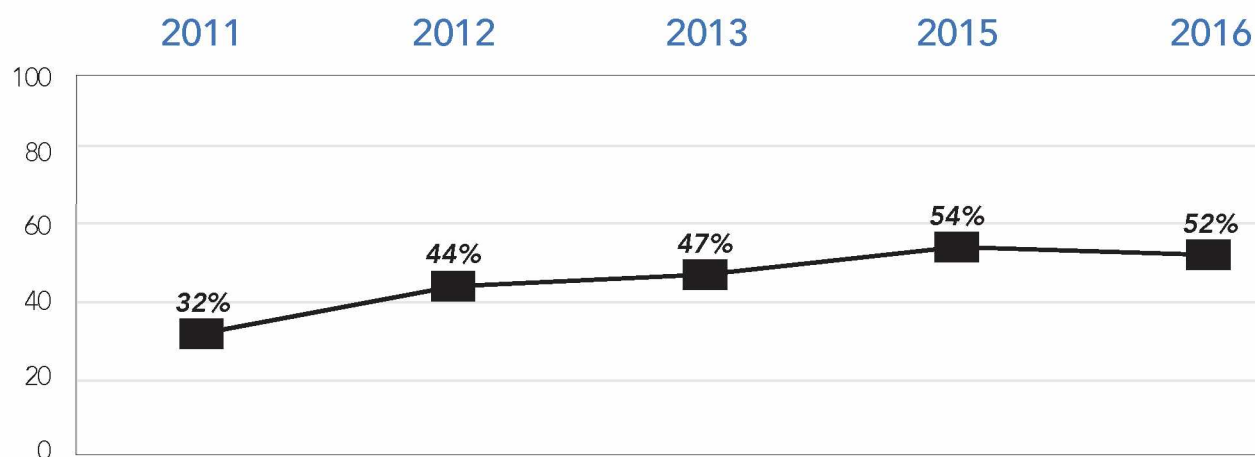


Figure 22: Cloud Computing Services Used or Planned for Use by Academic Libraries

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
<i>IT infrastructure (online storage, processing)</i>	23%	42%	43%	50%	50%
<i>Communications (web conferencing, video, podcasting)</i>	34%	39%	40%	44%	46%
<i>Specialized business applications (business management marketing, market research)</i>	4%	11%	7%	18%	13%
<i>Don't know/unsure</i>	55%	36%	37%	31%	34%
<i>Other</i>	4%	6%	4%	7%	4%

(Multiple responses permitted.)

Figure 23: Current Information Technology Tools and Platforms Used Within Academic Libraries

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Online library catalog/OPAC	94%	97%	94%	92%	85%
Integrated Library System (ILS)	81%	90%	82%	83%	79%
LAN/WAN/wireless network	81%	84%	73%	71%	69%
PCs/kiosks/laptops/mobile devices	66%	72%	67%	66%	68%
Web-based (IM or email) reference service	69%	70%	71%	64%	64%
Intranet/extranet/website	66%	75%	62%	61%	56%
Link resolvers	57%	61%	61%	58%	66%
Authentication solutions	51%	62%	49%	46%	58%
Discovery services	21%	35%	40%	46%	62%
Electronic Resource Management System	37%	36%	39%	39%	46%
Audio/video teleconferencing	20%	33%	24%	31%	37%
Web-scale management system	—	—	18%	19%	21%
Ebook readers	15%	26%	26%	27%	20%
3D printers/makerspaces or labs	—	—	1%	5%	17%
RFID check-in/check-out, inventory control	12%	17%	12%	16%	16%
Other	2%	2%	2%	2%	4%

(Multiple responses permitted.)

Figure 24: Current Information Technology Tools and Platforms Used Within Academic Libraries—By Full-Time Enrollment

(Includes all costs, including operations, acquisitions, and staffing.)

	<2.5K	2.5K–5K	5K–10K	>10K
Online library catalog/OPAC	77%	94%	88%	63%
LAN/WAN/wireless network	58%	86%	68%	64%
Integrated Library System (ILS)	67%	89%	84%	78%
PCs/kiosks/laptops/mobile devices	56%	71%	76%	72%
Intranet/extranet/website	53%	51%	52%	64%
Ebook readers	2%	26%	28%	17%
Web-based (IM or email) reference service	47%	74%	72%	69%
RFID check-in/check-out, inventory control	12%	20%	12%	22%
Audio/video teleconferencing	26%	37%	32%	53%
Authentication solutions	47%	63%	68%	58%
Electronic Resource Management System	42%	49%	44%	50%
Web-scale management system	23%	20%	12%	28%
Discovery services	58%	60%	76%	61%
Link resolvers	58%	66%	80%	64%
3D printers	2%	11%	24%	36%
Other	0%	2%	8%	8%

(Multiple responses permitted.)

Figure 25: Information Technology Tools and Platforms to be Purchased by Academic Libraries in the Year Ahead

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Discovery services	19%	30%	35%	24%	31%
3D printers/makerspaces or labs	—	—	2%	14%	19%
Integrated Library System (ILS)	20%	21%	21%	21%	18%
PCs/kiosks/laptops/mobile devices	22%	21%	28%	24%	15%
Link resolvers	9%	8%	9%	10%	13%
Online library catalog/OPAC	18%	21%	18%	20%	13%
Ebook readers	16%	32%	21%	16%	11%
Electronic Resource Management System	10%	7%	17%	14%	11%
Audio/video teleconferencing	5%	7%	13%	7%	11%
Web-scale management system	—	—	12%	12%	11%
Intranet/extranet/website	8%	11%	12%	12%	10%
Authentication solutions	5%	5%	16%	7%	5%
Web-based (IM or email) reference service	9%	7%	13%	9%	4%
RFID check-in/check-out, inventory control	5%	2%	5%	9%	3%
LAN/WAN/wireless network	9%	7%	8%	8%	3%
Other	18%	10%	10%	14%	14%

(Multiple responses permitted.)

Figure 26: Online, Cloud or Social Networking Services in Use at Academic Libraries

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Social networking (e.g., Facebook, LinkedIn)	57%	44%	62%	56%	59%
Sharing library web pages and subject guides (e.g., LibGuides)	45%	52%	57%	58%	56%
Document-sharing web apps	19%	23%	22%	26%	23%
Wikis or blogs	41%	30%	33%	21%	23%
Photo or video-sharing web apps	15%	11%	13%	14%	17%
Audio or video podcasts	21%	22%	18%	8%	14%
Patron reviews, ratings	21%	13%	15%	12%	9%
Tagging and rating	16%	13%	11%	7%	8%
Other	1%	0%	2%	2%	1%
Don't know/unsure	15%	27%	18%	10%	18%
We don't offer social networking tools/opportunities	13%	9%	8%	11%	7%

(Multiple responses permitted.)

TIGHT BUDGETS, LIGHT PLANNING

For academic libraries, tight budgets represent the greatest challenge going forward. As discussed earlier in this report, academic library budgets have been shrinking, and library managers are increasingly forced to provide more services for less. Although budgets may be tight, many of these managers are concerned with their ability to keep or attract the talent needed to move their libraries full-throttle into the digital era.

In terms of priorities, academic library managers are most focused on helping patrons better leverage the various services and offerings that are provided. Half indicated this is a priority for the year ahead, as they increasingly evolve into digital resource centers above and beyond physical tables and chairs. Providing gateways to the digital world also is seen as an important mission, as is the repurposing of the actual physical space. Many libraries see their roles evolving past simply warehouses of physical books, and more as providers of meeting and collaboration spaces, as well as 3D printing and makerspace facilities. (See Figure 27.)

To a large degree, academic library managers are not concerned with the challenges that online services and information present to their libraries—they're moving past this and re-orienting their facilities as campus resource centers. And, while tight budgets are a hurdle, many managers are concerned with their ability to find and retain staff members who can help move their libraries into the digital era. (See Figure 28.) These

issues are being faced across the board, regardless of the size of their institutions. (See Figure 29.)

A number of academic libraries report they have adopted strategic plans to guide their efforts going forward—though adoption of strategic planning still remains spotty. Slightly more than one-third now do such planning, mainly led by libraries in larger institutions. (See Figures 30 and 31.)

Another key aspect of addressing library requirements is measuring and determining the value of various initiatives. Currently, only about 16% of libraries have mechanisms or processes to measure return on investment. (See Figure 32.)

There also has been a slight rise in the percentage of academic libraries relying on consortia or networks to share content and materials. Twenty-eight percent say reliance on consortia has increased over the past year, up from 22% a year ago and 23% in 2011, the first year the survey was conducted. (See figure 33.)

Figure 27: Academic Libraries' Priorities for the Coming Year

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
Provide assistance/education on information access tools/services	61%	63%	57%	58%	50%
Increase availability of online pubs/digital access	63%	75%	68%	53%	46%
Repurpose physical space	46%	43%	43%	41%	42%
Drive usage of current resources	45%	42%	44%	45%	41%
Enhance discovery of collections	51%	59%	56%	51%	40%
Improve/expand customer service	48%	51%	51%	45%	32%
Provide support for online education/MOOCs	—	—	37%	27%	23%
Develop unique library collections	21%	30%	22%	18%	18%
Physical expansion/upgrade of facilities	19%	13%	22%	14%	18%
Join or increase participation in consortium/network	17%	20%	13%	14%	17%
Identify and reach out to new groups of patrons	17%	22%	15%	26%	17%
Institute special programs for constituents/patrons	21%	14%	3%	11%	14%
Enhancing user workflow tools	16%	22%	19%	17%	9%
Don't know/unsure	3%	4%	3%	6%	8%
Other	4%	2%	3%	8%	4%

(Multiple responses permitted.)

Figure 28: Academic Libraries' Challenges Over the Next 5 Years

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
<i>Maintaining services with tight budgets</i>	80%	82%	86%	82%	78%
<i>Keeping up with changes in information technology</i>	67%	74%	61%	62%	51%
<i>Finding and retaining knowledgeable staff</i>	32%	34%	33%	38%	36%
<i>Identifying new sources of funding</i>	40%	47%	39%	42%	35%
<i>Keeping facilities open/at preferred operational levels</i>	31%	26%	26%	29%	30%
<i>Migrating print content to digital formats</i>	40% 24%	43%	36%	32%	
<i>Competing/keeping up with public online services/offerings</i>	21%	17%	24%	21%	10%
<i>Other</i>	7%	3%	5%	3%	3%

(Multiple responses permitted.)

Figure 29: Academic Libraries' Challenges Over the Next 5 Years —By Community Population Size

(Includes all costs, including operations, acquisitions, and staffing.)

	<2.5K	2.5K–5K	5K–10K	>10K
Maintaining services with tight budgets	80%	89%	73%	70%
Keeping up with changes in information technology	67%	46%	38%	46%
Identifying new sources of funding	31%	29%	46%	38%
Finding and retaining knowledgeable staff	44%	31%	35%	30%
Keeping facilities open/at preferred operational levels	22%	43%	23%	30%
Migrating print content to digital formats	27%	17%	27%	22%
Competing/keeping up with public online services/offerings	13%	9%	8%	11%
Other	0%	2%	3%	8%

(Multiple responses permitted.)

Figure 30: Percentage of Libraries With Strategic Plans

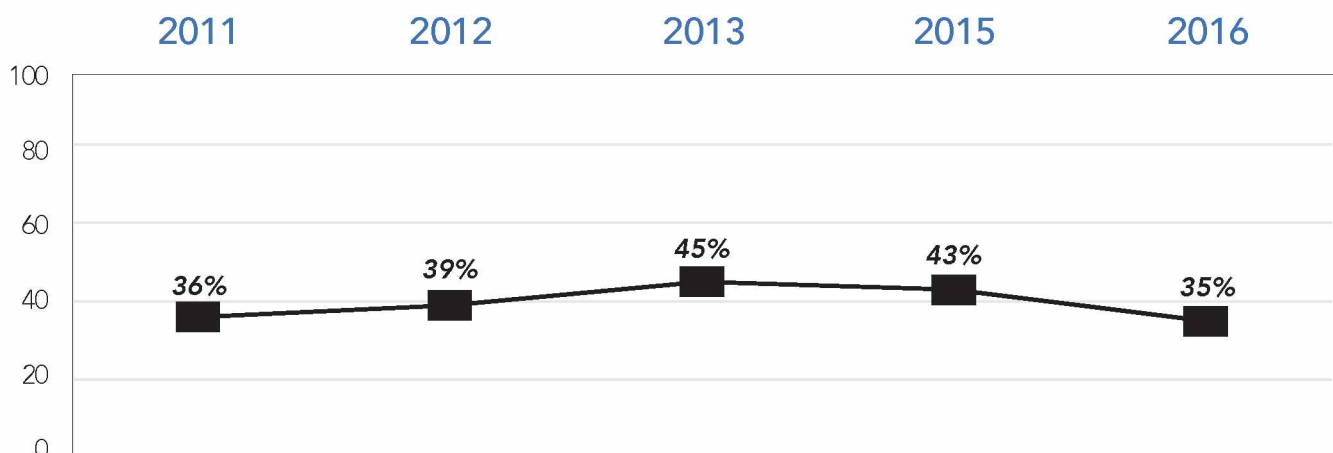


Figure 31: Academic Library Have Strategic Plan
—By Community Population Size

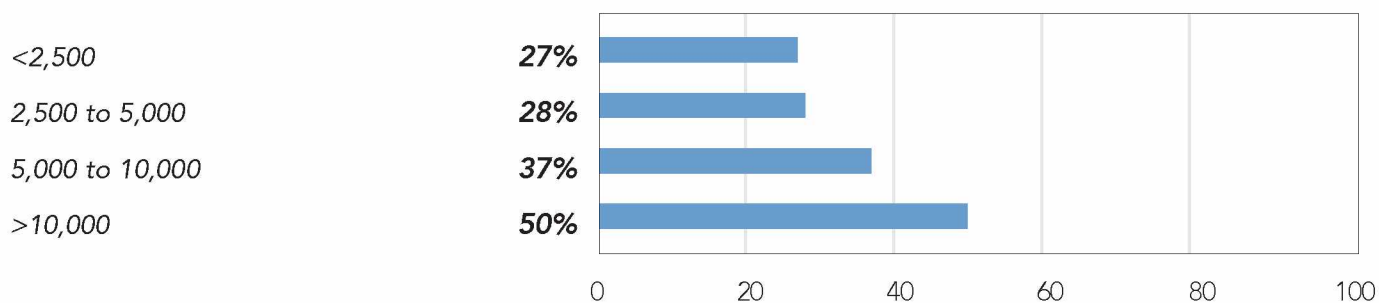
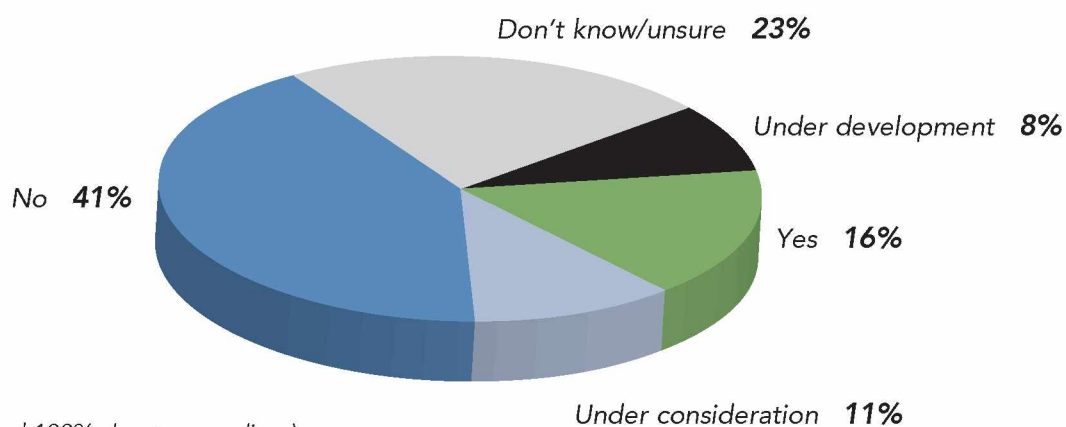


Figure 32: Measure Return on Investment on Programs and Activities?



(Totals may not equal 100% due to rounding.)

Figure 33: Change in Support from Consortia or Networks Over Past Year

(Includes all costs, including operations, acquisitions, and staffing.)

	2011	2012	2013	2015	2016
<i>Increased</i>	23%	27%	25%	22%	28%
<i>Decreased</i>	16%	16%	12%	9%	7%
<i>No change</i>	44%	37%	52%	55%	44%
<i>Don't know/unsure</i>	17%	20%	11%	14%	20%

(Totals may not equal 100% due to rounding.)

DEMOGRAPHICS

Figure 34: Respondents' Titles

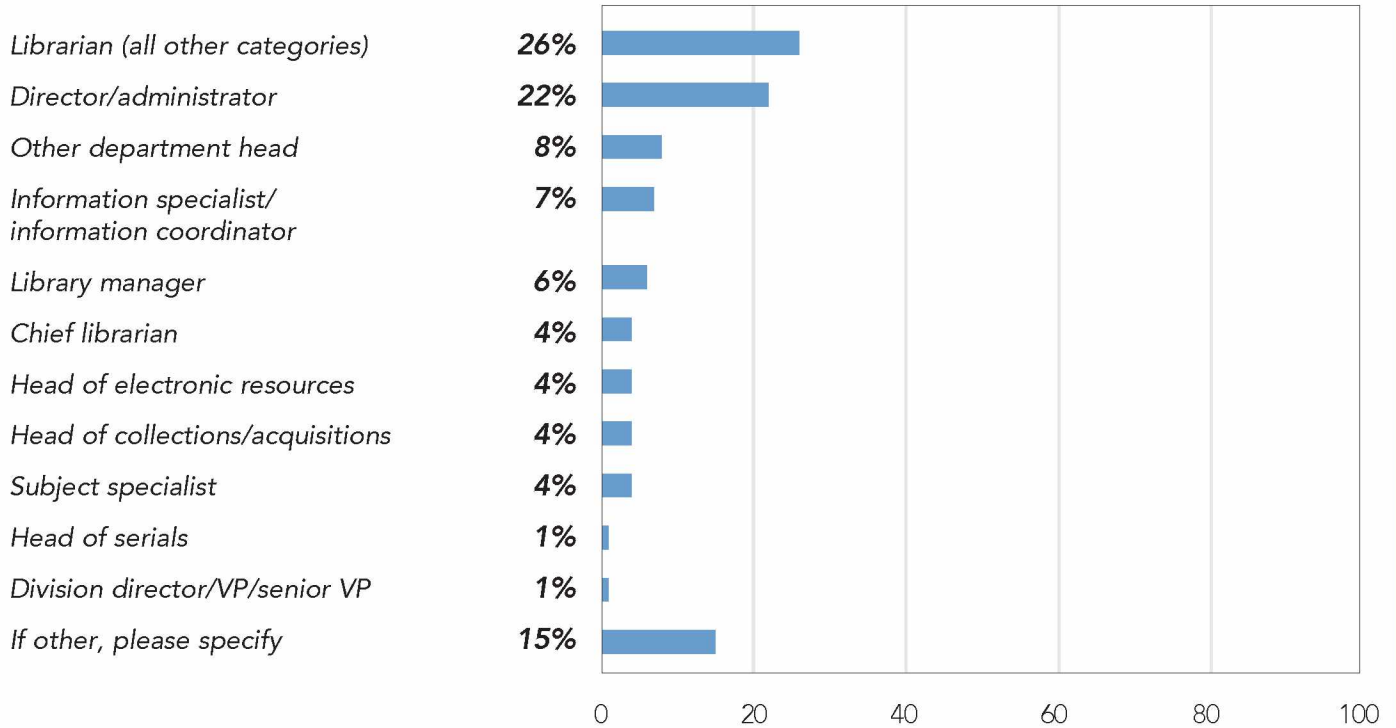


Figure 35: Populations Served—Full-Time Enrollment

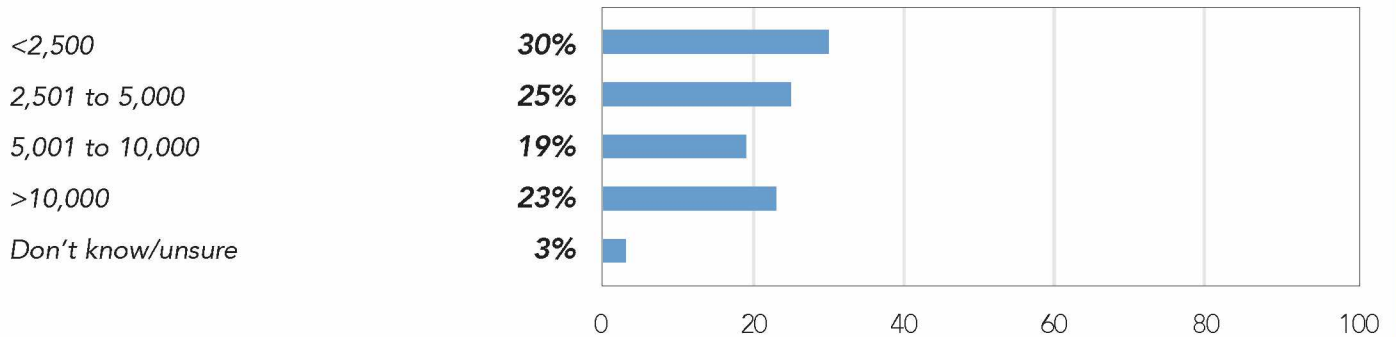


Figure 36: Type of Academic Library Infrastructures Surveyed

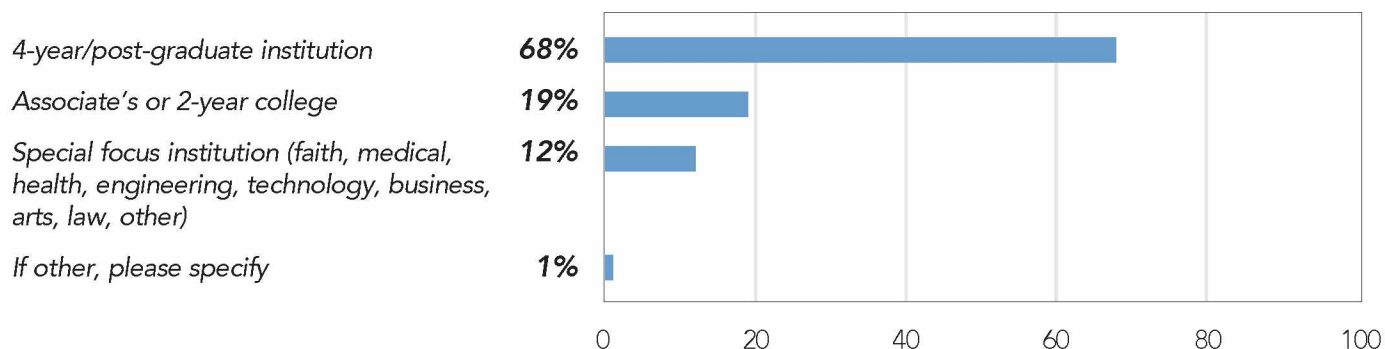


Figure 37: Ownership Status of Respondents' Institutions

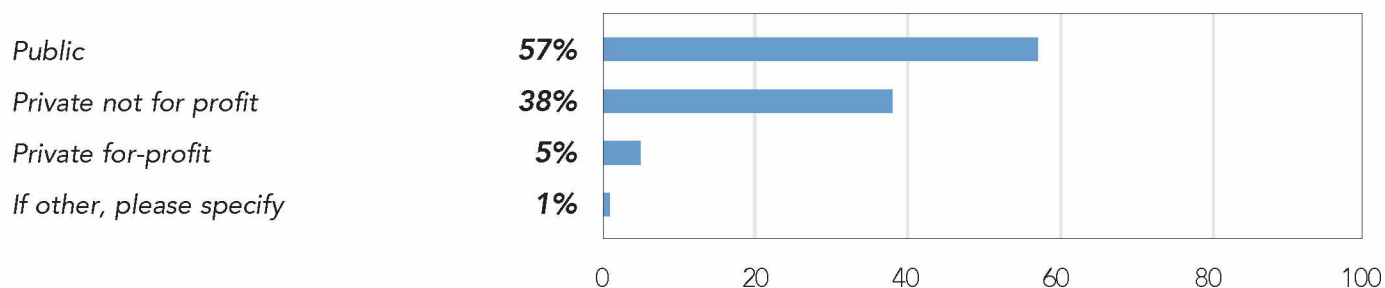
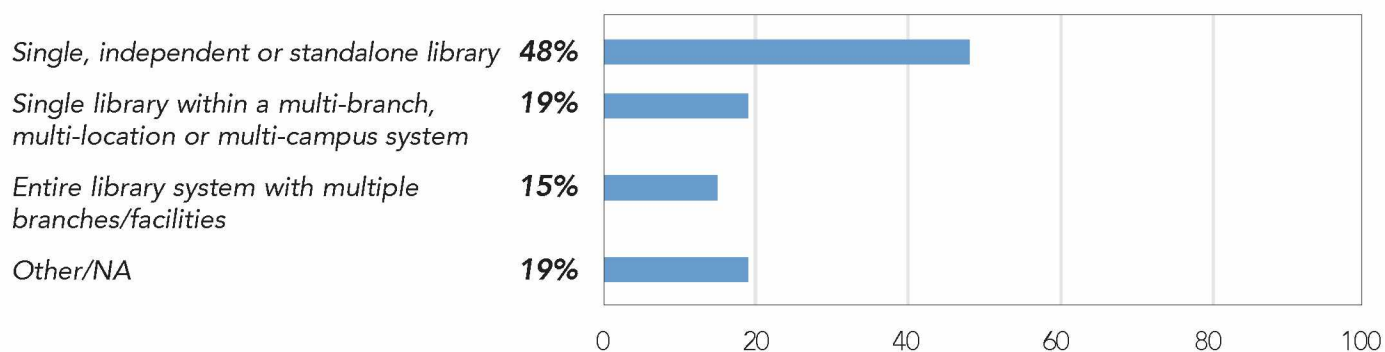


Figure 38: Affiliations of Libraries Surveyed



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METHODOLOGY

This survey is based on a sample of names drawn from Information Today, Inc.’s American Library Directory database. Respondents were solicited from email notifications to a list of 50,000 individuals at public, academic, government, and special

libraries. Responses were collected in the September–November 2015 time period. A total of 827 valid responses were gathered. This report is based on the responses of 324 respondents with academic libraries.

ABOUT THE RESEARCHERS

LRG’s “Benchmark Study on Library Spending” was conducted by Unisphere Research, the research arm of Information Today, Inc. Since 2004, Unisphere has completed more than 125 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, EMC, SAP, Symantec, Teradata, Informatica, VMware, Tableau Software, Mark Logic, and many others. Unisphere Research is uniquely capable of producing cogent market analysis through this experience and its working relationship with the editors of Information Today, Inc.’s (ITI’s) library products.

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