Publishers
Communication Group

Library Budget Predictions for 2016

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EXECUTIVE SUMMARY

WHAT WAS DONE

- A global telephone survey was carried out at 686 institutional libraries. Institutes in North America, South America, Europe, Asia Pacific and Middle East and Africa were contacted.
- Senior librarians with control over and knowledge of library budgets for 2016 were contacted.
- Academic institutions were split into categories reflecting the size and research focus level of their institute.
- The data in this study has been weighted to reflect the global contribution of each country to library spend. All counts in the report are based on the weighted number of responses, rather than the actual number.

SUMMARY OF RESULTS

The global economy continues to show mixed forecasts. Whilst the IMF predicts a "gradual pickup in advanced economies", they also report that growth in emerging markets is expected to be lower than that in 2014[1]. In the Eurozone, continued concerns about a Greek default and exit from the Euro cause some weakness for the currency – affecting some large mature economies. In the emerging economies, China faces some difficulties with slower than expected growth leading to a downturn on the global stock market. Russia faces challenges too – this export-driven economy is troubled both by low oil prices and international sanctions. These global conditions are reflected in the results of the Library Budget Survey.

The mature markets measured show very limited expansion – North America predicts a 1% increase in its overall budget spend for 2016. The situation in Europe is slightly worse – overall a -0.1% decrease is anticipated. Although regions containing predominantly emerging markets predict growth, this is generally at a lower level than previously. South America expects growth of 2.1% (5.9% for 2015). Middle East and Africa continues to predict the greatest proportional increase at 4.2%, but this too is down compared to last year's 6.8% predicted rise. Asia Pacific, influenced by China and India (emerging) and Japan (mature), balance out somewhat at an expected 2.8% increase.

Across the main budget lines, materials is anticipated to increase by 1.2%, serials by 1.4% and books by 1.3%. Spending patterns regionally broadly reflect the overall budget. Notably, North America predicts a 1.9% increase on its books budget whilst only increasing serials by 0.2%.

These tight serials budgets mean that librarians face challenges to balance the needs of their users alongside their available funding. This is demonstrated in the plans for additions and cancellations of serials. Overall, it is expected that an average of 52 serials will be added, while 75 will be cancelled. The emerging countries segment shows quite a different picture: 228 serials are expected to be added with just 14 cancellations on average. When asked how decisions on budget prioritisations are made, librarians tell us that they use several indicators – usage figures are considered by 88% of librarians, and 76% take feedback from users into account.

This year, we examined the usage of institutional search and discovery tools (which includes services such as Summon) as well as reference management tools. Responses show that neither of these services could be described as having "widespread" usage. While 76% of respondents are aware of institutional discovery tools, only 28% had already purchased such a service. A further 10% plan to invest in these in the near future. Reference management tools are better embedded: 58% already provide a service and this rises to 68% in the academic community.

[1] http://www.imf.org/external/pubs/ft/weo/2015/update/02/

The key findings of the study are:

Table 1: Budget % Change by Type of Institute							
Budget	**Academic Institutes**			**Corp.**	**Gov't**	**Hosp/ Medical**	**Total**
	Top	**Middle**	**Lower**				
Overall	1.7	1.4	1.6	0.4	-0.3	2.8	1.4
Materials	2.2	1.0	1.2	0.1	-1.1	2.4	1.2
Serials	2.3	1.8	1.2	1.0	0.5	1.1	1.4
Books	-0.2	0.5	1.2	0.7	1.6	4.2	1.3
n	*130*	*131*	*131*	*97*	*76*	*121*	*686*

NB: Error margin overall is ±3.3%. Arrows green or red indicate change greater than 0.5%

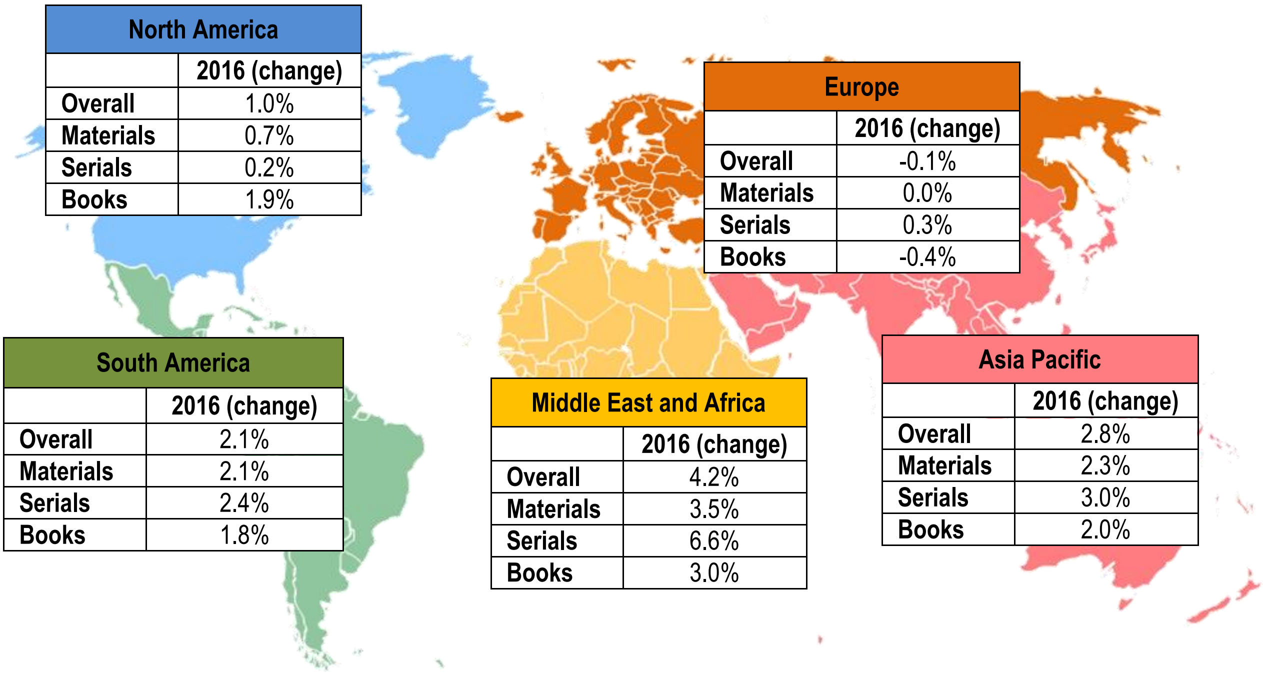
- Overall library budgets are set to **increase by 1.4%** (last year a 1.2% increase was forecast).
  - With the exception of Europe, all regions predict an overall budget increase for 2016. Europe's decrease is marginal at -0.1%. Across the institute types tracked, only Government predicts a decrease, albeit minimal at -0.3. The Medical sector predicts the highest rise across the sectors at 2.8%, a reasonable increase on last year's predicted 0.8% increase.
  - North America predicts a 1% increase in budget, following a 0.4% increase for 2015. Most of this growth is contributed by the Medical (2.5% increase) and the Corporate (3.3%) sectors. Academic institutes predict a modest 0.4% increase.
  - Asia Pacific forecasts a 2.8% rise, building on last year's 1.7% increase. Strong performers here are medical institutes. They predict a 6% rise on average. The academic sector expects a 2.9% increase. In line with the overall results, Government is the only sector to predict a decrease (-1.6%).
  - South America expects a comparatively modest increase this year at 2.1%, (last year was 5.9%). It is important to note that the base size for South America is low and therefore figures for South America should to be treated with caution throughout the report.
  - As with last year's report Middle East and Africa predict the largest region increase at 4.2%, however this is down on last year's anticipated figure of 6.8%. Again, the base size here is low and figures should be treated with caution.
  - Emerging countries (now including South Africa and Turkey) predict a 3.9% increase, down slightly on the 4.5% predicted for 2015.
  - Considering qualitative predictions, 33% of institutes expect their budget to increase, 49% to remain static while 15% will decrease.
- Materials budgets (all information content provision) are predicted to **increase by 1.2%** (last year saw a forecast of a 1.5% increase).
  - Regionally, Europe has the weakest forecast – the materials budget is expected to remain static in 2016. North America predicts 0.7% increase while Asia Pacific anticipates a 2.3% rise. South American budgets are expected to rise by 2.1%. Middle East and Africa again reports the largest increase at 3.5%.
  - 32% of institutes predict an increase, 47% remain static, 14% predict a decrease, and 7% were unable to say.
- Serials budgets are forecast to **increase by 1.4%** (last year a 1.5% increase was predicted)
  - North America predicts a 0.2% increase for serials for the second successive year, with its academic lower, government and medical sectors predicting small decreases. Europe expects a 0.3% increase: this is the highest of the four European budget lines, implying that serials are given priority for budget allocations. Asia Pacific budgets increase by 3%, with academic institutes slightly exceeding this with a 3.4% rise. Middle East and Africa performs strongly, with an anticipated 6.6% budget rise. This is a further improvement on last year's 4.9% increase. Conversely, South America expects a weaker rate of increase: 2.4% compared to 5.7% previously.
  - 36% of institutions expect an increase in serials budgets. 48% believe it will remain static whilst 14% predict a decrease in spend.
  - A reduction in available funds was the main reason given by those who expect their serials budget to decrease.
- Book expenditure is forecast to **increase by 1.3%** (an increase of 0.7% was predicted last year).

  - Europe predicts a decrease of -0.4% for their books budgets for 2016. This is partly driven by a decrease of 2.1% in the Academic Top sector: this contributes to an overall academic sector predicted decrease of -0.3% Corporate also performs below average at -1%
  - North America also shows a decline for the Academic Top sector (-1.6%). However, a strong predicted increase of 6% from the Medical sector boosts the North American average books budget to a1.9% anticipated increase.
  - Asia Pacific anticipates a 2.0% increase, slightly lower than last year's 2.2% increase. Similarly, Middle East and Africa predicts a 3.0% rise whereas last year's prediction was higher at 3.6%.
  - The majority (54%) of institutes believe their budgets will remain static. 26% predict that budget expenditure for 2016 will increase while 16% predict a decrease.
  - On average, 29.7% of the book budget is spent on e-books. E-book expenditure is predicted to increase by 5.1%: a stark contrast to print book expenditure which is expected to decrease by 2.9%.
  - The Major Reference Works (MRWs) budget for 2016 is set to decrease by 2.1% (last year a 0.9% decrease was forecast). 70% expect the budget to remain static. Just 6% expect it to increase.

- E-Journal services 98% of institutes take an e-journal service. E-only journals represent 63% of journal subscriptions. Institutes still take a reasonable portion of their subscriptions in print only form (22%), while the remainder is part of a combined print and electronic package.

- A&I Services are provided by 88% of institutes. Budgets here are expected to rise by 1.0%, however 65% of institutions believe their budget will remain static. Most institutes (80%) still take more take two or more services, with 46% taking 4 or more.

- Institutional Repositories – These are fairly widespread with just over half (54%) of institutes either owning or sharing ownership. Research articles continue to be the most commonly stored information type, with 83% of repositories holding them. In terms of content expansion, 44% felt that the repository was growing fast or very fast.



North America	2016 (change)
Overall	1.0%
Materials	0.7%
Serials	0.2%
Books	1.9%

Europe	2016 (change)
Overall	-0.1%
Materials	0.0%
Serials	0.3%
Books	-0.4%

South America	2016 (change)
Overall	2.1%
Materials	2.1%
Serials	2.4%
Books	1.8%

Middle East and Africa	2016 (change)
Overall	4.2%
Materials	3.5%
Serials	6.6%
Books	3.0%

Asia Pacific	2016 (change)
Overall	2.8%
Materials	2.3%
Serials	3.0%
Books	2.0%

WHO WAS SURVEYED

- Altogether 686 institutes were surveyed across a range of countries and institute types reflecting the market generally. Weights have been applied to the data to make the country breakdown representative of the global position. Institutes in Kenya, Nigeria, (MEA region) Uruguay and Peru (South America region) were included in the study for the first time this year although the number of interviews are low for these countries.
- The error margin is 3.3%± confidence interval at 90% confidence levels; however it must be borne in mind that the estimates made by some librarians are indications, rather than the known amount.
- Librarians were asked about their budgets and expenditures generally. The results therefore reflect market conditions.
- Librarians who were surveyed last year were approached again this year to take part in the survey and were offered a summary of last year's results as an incentive.
- Institutions were chosen from North America (USA, Canada), South America (Argentina, Brazil, Chile, Columbia, Mexico, Peru, Uruguay, Venezuela), Europe (20 countries), Asia Pacific (9 countries) and Middle East and Africa (Israel, Kenya, Nigeria, South Africa, Turkey). Since 2009, we have tracked, 'emerging countries', which cuts across geography (see next section for countries included in this group).
- Librarians were asked to quantify the number of members for the library. The average results by region and institute type are in the table opposite.
- Fieldwork took place Summer 2015

Table 2: Average number of Members and Students by type of Institute

Region	Level	Members/Users
North America	Academic top	24,815
	Academic middle	12,709
	Academic lower	3,470
	Medical/Health	3,902
	Government	4,820
	Corporate	6,333
Europe	Academic top	30,895
	Academic middle	15,095
	Academic lower	8,179
	Medical/Health	3,040
	Government	2,405
	Corporate	8,070
Asia Pacific	Academic top	31,873
	Academic middle	15,671
	Academic lower	5,755
	Medical/Health	2,728
	Government	651
	Corporate	5,434
South America	Academic top	34,063
	Academic middle	18,750
	Academic lower	10,731
	Medical/Health	4,559
	Government	28,938
	Corporate	5,483
Middle East and Africa	Academic top	17,938
	Academic middle	10,354
	Academic lower	4,415
	Medical/Health	8,854
	Government	8,175
	Corporate	3,190

Consortia Membership

The majority of those surveyed are consortia members (77%), with the proportion highest among academic top institutes (92%). On average, 89% of academic institutes belong to a consortium.

Of those in a consortium, most (58%) believe spending on consortia will stay the same over the next two years.

Table 3: Belong to a consortium

Institute Type	Yes	No
Academic Top	92%	8%
Academic Middle	90%	10%
Academic Lower	83%	17%
Medical/Health	76%	24%
Government	55%	45%
Corporate	49%	51%
Total	77%	23%

Table 4: Spending change on consortia deals

Institute Type	Increase	Decrease	Stay the same
Academic Top	34%	4%	62%
Academic Middle	39%	3%	58%
Academic Lower	44%	7%	50%
Medical/Health	43%	3%	53%
Government	34%	5%	61%
Corporate	17%	10%	73%
Total	37%	5%	58%

Institutional Repositories (for more detail please see the final section) Librarians were asked if their institute had their own institutional repository. Overall, more than a half (54%) have an institutional repository, with academic institutes being most likely to have a repository (71%).

Table 5: Have an institutional repository

Institute Type	Yes	No
Academic Top	85%	15%
Academic Middle	63%	37%
Academic Lower	65%	35%
Medical/Health	28%	72%
Government	38%	62%

Corporate	33%	67%
Total	54%	46%

SAMPLE FRAME

The sample frame was constructed into several organisation types: Academic, Corporate, Government, and Medical - the Academic sector was further split into three groups based upon size of the institute. The breakdown by country and type is in the table below. Emerging countries are a grouping introduced in 2009 and are a subset of countries that cross the below geographical categories and includes: India, China, Czech Republic, Hungary, Poland, Romania, Russia, Argentina, Brazil, Chile, Columbia, Mexico and Venezuela. This year, Turkey and South Africa have been added to this category. These tallies show the weighted contribution to the study, as opposed to the actual number of interviews. Rounding on these weights means that the totals do not completely tally in this view.

Table 6: Breakdown of sample by country and type of institute

Region	Country	Academic			Medical	Gov't	Corp.	Total	% of overall sample
		top	middle	lower					
Asia Pacific	Australia	4	2	2	2	0	1	**11**	2%
	China	16	15	17	10	10	10	**78**	11%
	Hong Kong	1	0	1	1	0	0	**3**	0%
	India	4	4	4	4	2	3	**21**	3%
	Japan	10	14	14	13	9	12	**72**	10%
	Korea	4	4	3	6	4	3	**24**	3%
	Malaysia	1	2	2	0	0	0	**5**	1%
	New Zealand	1	1	1	0	0	0	**3**	0%
	Taiwan	2	2	2	3	0	3	**12**	2%
	Total							***226***	***33%***
Europe	Austria	1	2	1	2	0	0	**6**	1%
	Belgium	1	2	1	2	1	1	**8**	1%
	Czech Republic	1	1	1	2	0	2	**7**	1%
	Denmark	1	2	1	2	1	1	**8**	1%
	Finland	1	1	1	1	0	0	**4**	1%
	France	4	5	5	5	3	2	**24**	3%
	Germany	6	6	6	5	5	6	**34**	5%
	Hungary	1	0	2	0	0	2	**5**	1%
	Ireland	2	2	0	0	0	0	**4**	1%
	Italy	4	4	4	3	2	3	**20**	3%
	Netherlands	1	1	1	2	1	1	**7**	1%
	Poland	1	2	1	1	1	2	**8**	1%
	Portugal	1	1	1	1	0	0	**4**	1%
	Romania	1	1	1	1	1	1	**6**	1%
	Russia	3	3	2	1	2	2	**13**	2%
	Spain	3	2	4	3	1	1	**14**	2%
	Sweden	2	1	1	1	1	1	**7**	1%
	Switzerland	2	1	1	1	1	1	**7**	1%
	United Kingdom	5	3	5	4	3	4	**24**	3%
	Total							***200***	***29%***
North America	Canada	3	3	3	4	2	3	**18**	3%
	United States	38	38	36	35	21	27	**195**	28%
	Total							***212***	***31%***
South America	Argentina	1	1	0	0	1	2	**5**	1%
	Brazil	3	3	3	2	2	2	**15**	2%
	Chile	1	1	1	0	0	0	**3**	0%
	Colombia	1	1	1	1	0	0	**4**	1%
	Mexico	1	1	1	1	1	1	**6**	1%
	Peru	1	0	1	0	1	0	**3**	0%
	Uruguay	0	1	1	1	0	0	**3**	0%
	Venezuela	1	0	1	0	1	0	**3**	0%
	Total							***32***	***5%***
Middle East and Africa	Israel	1	1	1	1	1	1	**6**	1%
	Kenya	1	0	1	0	0	0	**2**	0%
	Nigeria	1	0	0	0	0	0	**1**	0%
	Saudi Arabia	0	0	1	0	0	0	**1**	0%
	South Africa	1	1	1	1	1	1	**6**	1%
	Turkey	1	1	1	1	1	1	**6**	1%
	Total							***18***	***3%***

Grand Total	***131***	***131***	***130***	***121***	***76***	***97***	***686***	*100%*
Overall %	***19%***	***19%***	***19%***	***18%***	***11%***	***14%***	***100%***	

OVERALL LIBRARY EXPENDITURE

OVERALL LIBRARY BUDGET BROKEN DOWN

- The overall library budget includes the ongoing costs of maintaining a library, salary, materials and operating expenditure.
- By examining the Association of Research Libraries (ARL) expenditure we can get an idea of how library budgets breakdown.
- The ARL statistics include details of collections, expenditures, staffing, and service activities for its member libraries and the majority of the libraries are large North American academic institutes.
- The latest data that we have from the ARL is from 2014. 115 members of the ARL reported a combined expenditure of $3.4 billion. This expenditure broke down into three areas: salaries (43%, which has dropped 1% since 2013) materials (44% - static), and other operating expenditures (12%) made up the remainder of the budget.
- The materials budget further broke down into ongoing resource expenditure (72%), one-time resource expenditure (24%), with the rest being allocated to collection support. It is worth noting that the ARL no longer classifies expenditure in terms of serials or books, they changed their approach in 2012. However, when looking at their definitions and the amount of expenditure this classification represents when compared to previous periods, it is pretty clear most of the expenditure associated with ongoing resources will be traditional journal subscriptions.

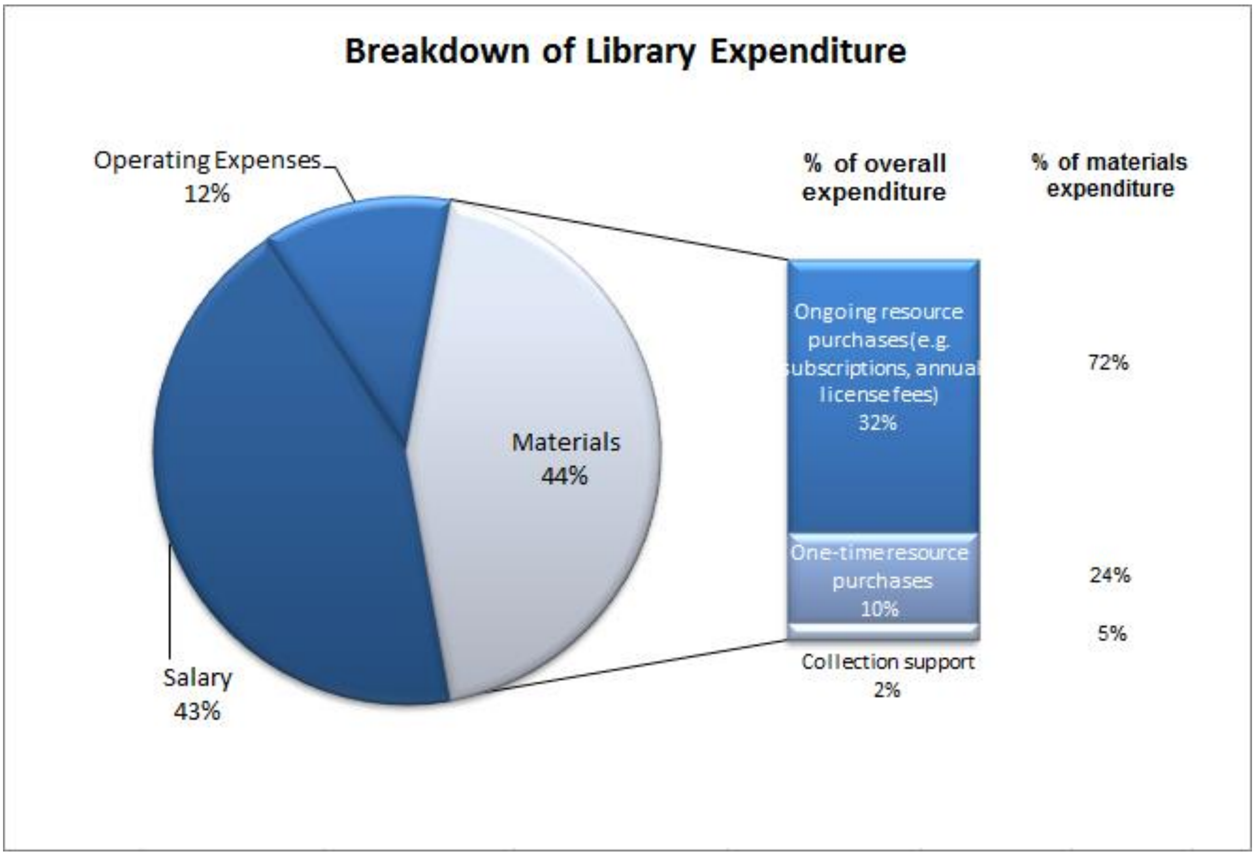


Figure 1

OVERALL LIBRARY BUDGET CHANGE FOR 2016

- <u>% Change:</u> The overall library budget continues to show slight year-on-year increases. For the last three years, the predictions have increased by 0.2%. This continues a slow recovery from the global recession when most budgets were predicted to decrease. **Overall, a 1.4% increase is predicted for 2016.**
    - Region: **All regions with the exception of Europe expect an increase** in their overall budget, albeit very modest for North America. Europe expects a decline of -0.1%. Asia Pacific predicts a 2.8% increase, an improvement on last year's 1.7% increase.
    - Type of institute: **Corporate** is the only market expecting to see a lesser increment in its budgets than for last year. Budgets here are expected to increase by 0.4%, compared to 1.9% last year. **Government** is the only segment to expect a decrease in budget, however at -0.3%, this is a minor improvement on last year's -0.6% decrease. **Medical** markets show the strongest performance – an increase of 2.8% is expected for 2016. **Academic** markets show the greatest stability and expect a 1.6% increase
- <u>Qualitative predictions</u>: suggest that 49% of institutional budgets will remain static. Only 33% of institutes predict an increase: down from 40% last year. 4% fewer institutes expect a decrease in their budget than last year (15% for 2016 vs 19% for 2015). European institutes are most likely to remain static (58%), while North America has the largest proportion of budget decreases – however at 17%, this is only marginally higher than Europe(16%) and Asia Pacific (15%)

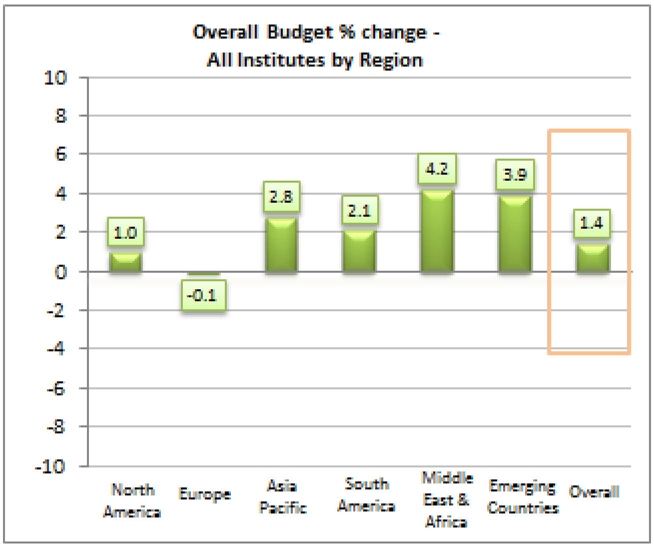


Figure 2

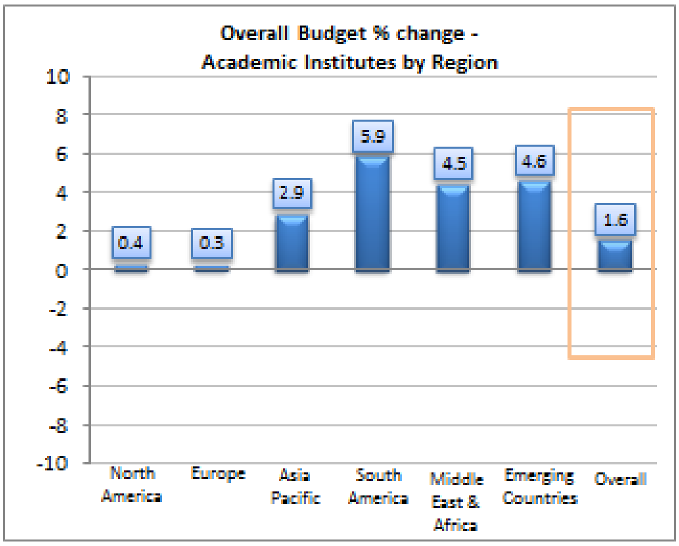


Figure 3

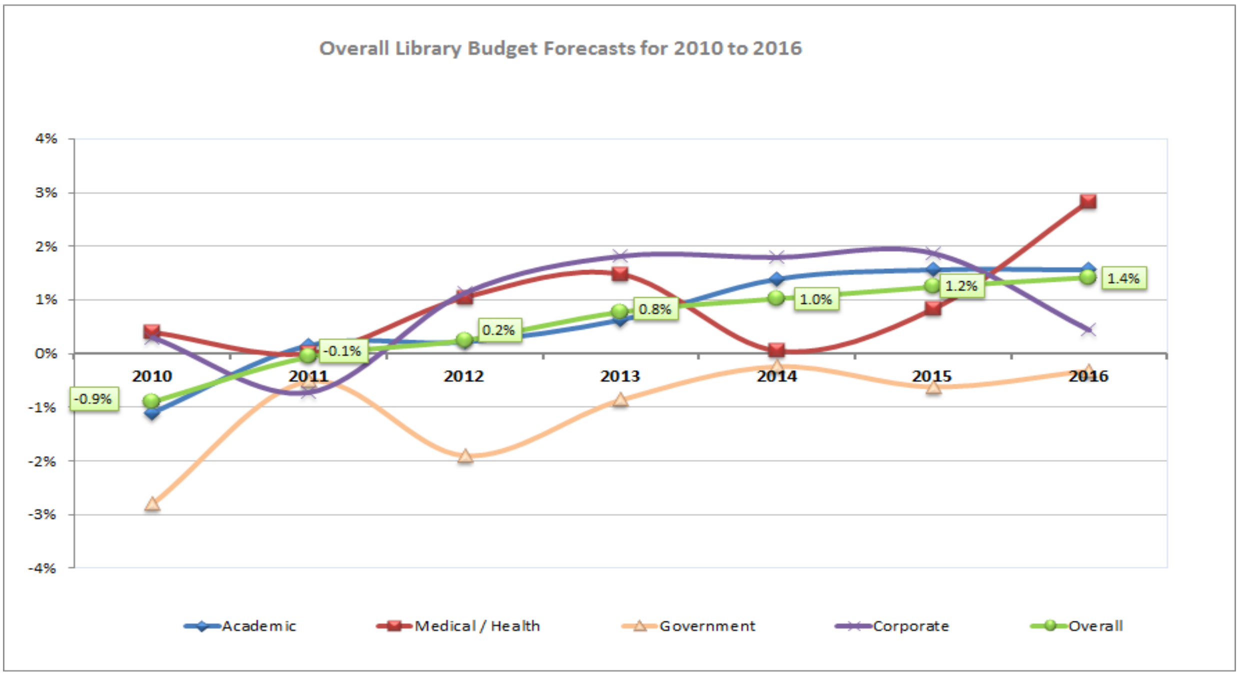


Figure 4

Table 7: Library Budget change for 2016 - Overall Library Budget					
		Qualitative Predictions			*Quantitative Predictions*
		% respondents predicting			
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	41%	39%	20%	0.9
	Academic Middle	29%	46%	24%	-0.5
	Academic Lower	45%	35%	20%	0.7
	All Academic	*39%*	*40%*	*21%*	*0.4*
	Medical/Health	33%	51%	10%	2.5
	Government	26%	43%	26%	-1.0
	Corporate	34%	62%	0%	3.3
	Overall	**36%**	**46%**	**17%**	**1.0**
Europe	Academic Top	22%	59%	11%	0.7
	Academic Middle	26%	50%	21%	0.0
	Academic Lower	21%	55%	16%	0.3
	All Academic	*23%*	*55%*	*16%*	*0.3*
	Medical/Health	8%	58%	22%	-0.5
	Government	22%	61%	4%	1.0
	Corporate	18%	64%	14%	-2.0
	Overall	**20%**	**58%**	**16%**	**-0.1**
Asia Pacific	Academic Top	38%	50%	10%	2.7
	Academic Middle	41%	41%	16%	3.6
	Academic Lower	47%	35%	19%	2.4
	All Academic	*42%*	*42%*	*15%*	*2.9*
	Medical/Health	50%	38%	13%	6.0
	Government	15%	54%	31%	-1.6
	Corporate	38%	53%	9%	1.9
	Overall	**40%**	**44%**	**15%**	**2.8**
South America	Academic Top	43%	43%	14%	5.6
	Academic Middle	50%	33%	17%	5.7
	Academic Lower	50%	50%	0%	6.4
	All Academic	*47%*	*42%*	*11%*	*5.9*
	Medical/Health	25%	75%	0%	2.7
	Government	20%	60%	0%	2.0
	Corporate	20%	40%	40%	-12.3
	Overall	**36%**	**48%**	**12%**	**2.1**
Middle East and Africa	Academic Top	33%	67%	0%	2.9

	Academic Middle	25%	50%	0%	3.1
	Academic Lower	75%	25%	0%	6.9
	All Academic	*45%*	*45%*	*0%*	*4.5*
	Medical/Health	33%	33%	33%	1.9
	Government	50%	50%	0%	9.2
	Corporate	0%	100%	0%	1.7
	Overall	**39%**	**50%**	**6%**	**4.2**
Emerging Countries	Academic Top	47%	44%	3%	4.4
	Academic Middle	39%	45%	9%	3.5
	Academic Lower	56%	29%	6%	6.0
	All Academic	*48%*	*40%*	*6%*	*4.6*
	Medical/Health	48%	32%	12%	8.2
	Government	26%	63%	0%	2.8
	Corporate	38%	42%	15%	-1.5
	Overall	**44%**	**42%**	**8%**	**3.9**
Overall	Academic Top	35%	48%	13%	1.7
	Academic Middle	33%	45%	19%	1.4
	Academic Lower	40%	42%	16%	1.6
	All Academic	*36%*	*45%*	*16%*	***1.6***
	Medical/Health	31%	49%	15%	2.8
	Government	21%	54%	18%	-0.3
	Corporate	29%	60%	9%	0.4
	Overall	**33%**	**49%**	**15%**	**1.4**

MATERIALS EXPENDITURE

MATERIALS BUDGET CHANGE FOR 2016

The materials budget covers all the costs a library incurs when purchasing content for the library, including journal subscriptions, book costs, inter-library loans etc.

- % Change: Overall material budgets are set to increase in 2016 by **1.2%** (last year was a 1.5% increase).
  - Region: A modest growth is predicted for most regions – the exception being **Europe** who expect the budget to remain static for 2016. This is a backwards step, as last year's prediction of a 1% increase had seemed to turn a corner on previous declines. **North American** budgets are expected to rise by 0.7%, an increase of 0.5% from 2015's predictions. **Asia Pacific** posts a slightly stronger prediction this year – budgets here are due to increase by 2.3% (last year was a 2.2% increase). **South America** and **Middle East & Africa** both expect reasonable increases, but the figures of 2.1% and 3.5% respectively are much lower than predicted last year (5.9% and 6.9%).
  - Type of institute: **Medical** institutes report the strongest growth, expecting a 2.4% rise in the materials budget (up from 1.1% last year). All other segments predict a lower level of change in their funding than last year. Academic institutes forecast a 1.5% increase, compared to 1.7% for 2015. Government institutes expect a 1.1% decrease in budget, while the Corporate budget prediction just stays positive with an expected 0.1% increase.
- Qualitative predictions: suggest that 32% of institutes will see an increase in their budget (6 points down on last year) with 47% believing their budget will remain static. The number of institutes forecasting a drop in budget for 2016 is 14%.
  - Region: **Europe** has by far the lowest proportion of institutes predicting an increase (20%) and this is a downturn on last year's expectations (27%). However, the proportion of those expecting decreases is in line with the overall figure at 14%. As may be expected by the static quantitative figure, the bulk of respondents expect the budget to remain static (55%). **Middle East and Africa** has the highest proportion of increases – 41% expect to expand their materials spending in 2016.
  - Type of institute: **Government** institutes predict the smallest proportion of increases at 19%. **Academic Top** performs most strongly with 39% of institutes expecting an increase in spending. **Academic Middle** has the highest proportion of decreases at 19%.
- Reasons for change: In terms of reasons why **budgets are decreasing,** institutes report that it is mostly due to reduction in funding. As for **budget increases,** most common reasons include the inflation of prices for materials, and to cover price increases and new subscriptions.

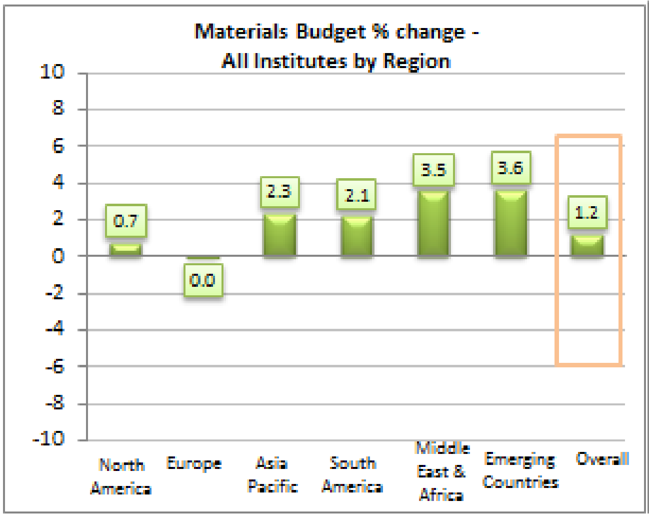


Figure 5

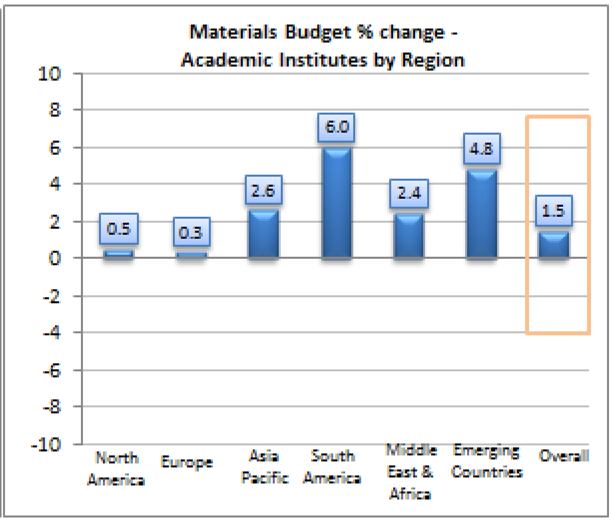


Figure 6

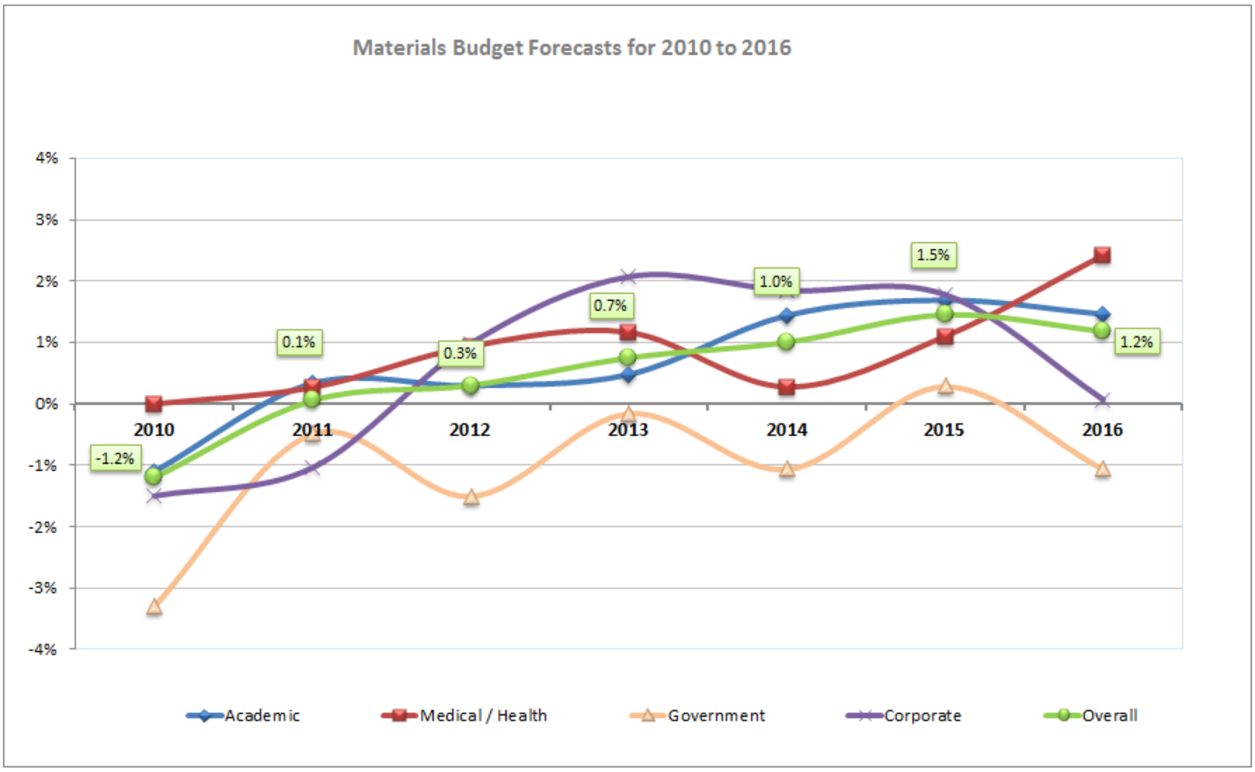


Figure 7

Table 8: Materials Budget change for 2016					
		Qualitative Predictions			*Quantitative Predictions*
		% respondents predicting			
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	45%	40%	13%	1.2
	Academic Middle	35%	35%	23%	-0.1
	Academic Lower	45%	33%	23%	0.3
	All Academic	*42%*	*36%*	*19%*	*0.5*
	Medical/Health	33%	51%	8%	2.5
	Government	26%	39%	22%	-0.8
	Corporate	21%	68%	4%	0.5
	Overall	**36%**	**43%**	**15%**	**0.7**
Europe	Academic Top	24%	55%	5%	1.1
	Academic Middle	26%	53%	18%	-0.2
	Academic Lower	22%	54%	19%	0.2
	All Academic	*24%*	*54%*	*14%*	*0.3*
	Medical/Health	8%	59%	16%	-1.9
	Government	23%	50%	9%	1.8
	Corporate	14%	54%	11%	-0.8
	Overall	**20%**	**55%**	**14%**	**0.0**
Asia Pacific	Academic Top	49%	40%	9%	3.2
	Academic Middle	43%	36%	18%	2.3
	Academic Lower	32%	52%	16%	2.3
	All Academic	*41%*	*43%*	*15%*	*2.6*
	Medical/Health	47%	45%	8%	5.5
	Government	8%	62%	23%	-4.6
	Corporate	47%	47%	6%	2.1
	Overall	**39%**	**46%**	**13%**	**2.3**
South America	Academic Top	50%	50%	0%	6.1
	Academic Middle	43%	29%	14%	5.4
	Academic Lower	50%	50%	0%	6.4
	All Academic	*47%*	*42%*	*5%*	*6.0*
	Medical/Health	25%	50%	0%	3.0
	Government	20%	60%	0%	2.0
	Corporate	0%	50%	50%	-13.2
	Overall	**34%**	**47%**	**9%**	**2.1**
Middle East and Africa	Academic Top	25%	75%	0%	5.1
	Academic Middle	33%	67%	0%	2.8

	Academic Lower	67%	0%	33%	-0.9
	All Academic	*40%*	*50%*	*10%*	*2.4*
	Medical/Health	50%	0%	50%	5.9
	Government	50%	50%	0%	9.2
	Corporate	33%	33%	0%	2.5
	Overall	**41%**	**41%**	**12%**	**3.5**
Emerging Countries	Academic Top	61%	30%	0%	5.6
	Academic Middle	48%	36%	12%	3.0
	Academic Lower	46%	46%	0%	5.8
	All Academic	*51%*	*38%*	*4%*	*4.8*
	Medical/Health	46%	35%	12%	6.8
	Government	5%	74%	0%	0.9
	Corporate	31%	50%	19%	-2.1
	Overall	**42%**	**43%**	**7%**	**3.6**
Overall	Academic Top	39%	45%	8%	2.2
	Academic Middle	36%	41%	19%	1.0
	Academic Lower	35%	45%	17%	1.2
	All Academic	*37%*	*44%*	*15%*	***1.5***
	Medical/Health	30%	51%	11%	2.4
	Government	19%	52%	16%	-1.1
	Corporate	27%	54%	9%	0.1
	Overall	**32%**	**47%**	**14%**	**1.2**

MATERIALS EXPENDITURE ON ELECTRONIC RESOURCES

Institutions were asked what proportion of the current (2015) materials budget was spent on electronic resources. Overall, 59% of the budget is used for electronic information, with North America spending the highest proportion (72%). This is a 2% increase on the previous year. The South America percentage drops by 9% to 38%, however the sample size here is low and more prone to fluctuation. Overall, Academic Top institutes continue to have the greatest proliferation of electronic resources.

Table 9

Percentage Expenditure On Electronic Information Resources

Region	Organisation	% (2005)	% (2006)	% (2007)	% (2008)	% (2009)	% (2010)	% (2011)	% (2012)	% (2013)	% (2014)	% (2014)
North America	Academic Top	30.6	30.5	39.1	51.3	60.2	61.3	64.0	69.5	64.6	73.8	78.6
	Academic Middle	34.5	31.5	37.1	54.3	52.2	64.4	65.6	66.3	61.6	69.3	74.8
	Academic Lower	23.1	25.1	23.4	44.2	44.6	50.5	49.6	56.7	62.8	69.2	61.0
	Medical/Health	30.1	33.1	34.2	39.3	46.4	54.8	59.1	55.4	61.6	71.2	72.0
	Government	34.7	32.5	51.4	43.6	52.7	50.9	62.6	45.7	72.4	51.3	64.3
	Corporate	45.5	39.9	48.8	48.1	54.1	72.0	62.2	59.5	68.7	74.8	76.9
	Overall	**31.4**	**31.4**	**37.2**	**47.7**	**51.2**	**58.8**	**60.4**	**59.3**	**64.3**	**69.2**	**71.6**
Europe	Academic Top	38.2	27.9	45.7	43.5	44.5	50.5	46.3	51.5	51.4	54.6	59.8
	Academic Middle	34.1	34.0	38.3	40.7	40.7	42.9	45.7	52.9	44.8	53.8	55.5
	Academic Lower	27.3	31.1	33.8	40.7	41.8	47.2	43.8	52.9	42.0	50.8	45.9
	Medical/Health	44.1	38.8	40.0	42.1	36.8	44.7	41.9	40.6	49.2	53.4	57.1
	Government	32.6	31.4	45.5	42.5	46.2	46.7	37.8	38.4	36.0	43.4	51.9
	Corporate	37.9	45.6	45.3	50.8	31.2	46.9	46.4	48.3	51.0	51.3	62.0
	Overall	**35.5**	**34.0**	**40.7**	**42.7**	**40.8**	**46.4**	**43.9**	**48.0**	**46.3**	**52.0**	**55.6**
Asia Pacific	Academic Top	30.0	29.8	38.8	37.8	41.4	51.3	53.4	54.6	57.0	60.0	59.2
	Academic Middle	38.6	31.3	39.2	28.6	42.8	45.5	48.8	50.0	49.2	54.7	56.9
	Academic Lower	26.4	16.3	23.2	39.7	37.5	34.3	42.5	43.5	44.9	40.8	35.1
	Medical/Health	15.3	7.6	33.3	54.9	32.7	56.0	43.1	55.6	60.2	59.8	61.1
	Government	14.9	31.4	33.0	29.4	28.9	46.3	47.3	41.9	38.6	44.0	57.8
	Corporate	19.1	22.6	45.3	29.2	51.7	52.0	55.1	52.6	51.6	56.9	56.8
	Overall	**25.7**	**23.5**	**33.2**	**39.1**	**39.4**	**46.8**	**48.1**	**50.1**	**50.9**	**53.2**	**53.9**
South America	Academic Top				29.4	42.5	40.6	42.9	43.9	40.5	62.0	42.2
	Academic Middle				29.2	38.6	39.3	40.0	40.6	41.3	40.4	27.3
	Academic Lower				21.0	23.3	22.5	27.9	28.1	38.3	47.9	38.0
	Medical/Health				15.0	27.1	27.1	29.9	29.9	30.8	54.2	31.3
	Government				15.0	15.0	15.5	18.5	27.5	42.9	30.0	34.4
	Corporate				15.0	15.0	15.5	17.5	29.0	43.2	49.1	53.3
	Overall				**24.2**	**30.6**	**30.6**	**33.8**	**34.9**	**38.7**	**48.9**	**38.0**
Middle East and Africa	Academic Top										72.1	64.8
	Academic Middle										71.0	72.2
	Academic Lower										61.6	64.5
	Medical/Health										70.6	60.5
	Government										35.0	60.0
	Corporate										52.2	43.2
	Overall										**63.9**	**62.1**
Emerging	Academic Top				28.9	48.5	40.4	43.5	44.6	52.1	53.6	51.2
	Academic Middle				33.4	44.0	35.9	39.8	49.0	45.9	43.4	42.6
	Academic Lower				36.5	39.5	28.7	29.4	34.9	44.7	45.6	30.7
	Medical/Health				17.5	38.4	37.2	32.5	41.6	51.9	59.5	57.1
	Government				26.9	41.6	22.8	25.6	30.6	33.5	32.6	42.9
	Corporate				37.5	42.5	37.7	36.3	34.4	38.2	51.0	58.2
	Overall				**38.0**	**42.5**	**34.6**	**35.8**	**41.0**	**45.3**	**48.2**	**46.8**
Overall	Academic Top	33.5	29.4	41.7	43.7	48.5	53.2	53.7	57.1	56.8	63.3	64.9
	Academic Middle	35.4	32.4	38.2	44.3	44.0	49.6	51.6	54.3	51.4	58.9	61.1
	Academic Lower	25.5	23.6	27.1	38.9	39.5	42.2	43.9	49.0	49.7	54.0	47.2
	Medical/Health	32.9	30.2	36.9	37.0	38.4	49.6	48.1	49.0	55.9	62.3	62.5
	Government	28.2	31.7	44.9	41.0	41.6	46.9	47.5	41.2	48.2	45.8	56.9
	Corporate	34.0	37.7	46.7	48.8	42.5	55.9	53.1	52.7	56.2	61.1	63.9
	Overall	**32.0**	**30.0**	**38.0**	**42.0**	**42.5**	**49.3**	**49.6**	**51.3**	**53.2**	**58.3**	**59.4**

SERIALS EXPENDITURE

SERIALS BUDGET CHANGE FOR 2016

- % Change: The serials budget in 2016 is set to increase by 1.4%. This is a marginal decrease on the 2015 prediction of 1.5% and continues to be the most stable of the four main budget lines over recent years when considering the organizational breakdowns.
    - Region: All regions expect a serials budget increase in 2016, albeit modest for **North America (0.2%) and Europe (0.3%).** Middle East and Africa predict a strong increase of 6.6%, an increase on last year's 4.9% forecast. Asia Pacific budgets will rise by 3%. South American predictions are less optimistic than last year (2.4% vs 5.7%).
- Type of institute: All institute types expect an increase, with 5 of the 6 segments predicting a rise of 1% or higher. The exception is **Government**, which only anticipates a 0.5% increase.
- Qualitative predictions: suggest that 36% of institutes forecast an increase in their serials budget for 2016: 4 points down on last year. 14% predict a decrease. Of the segments, Academic Top appears the healthiest, with 48% predicting a rise in serials spending.

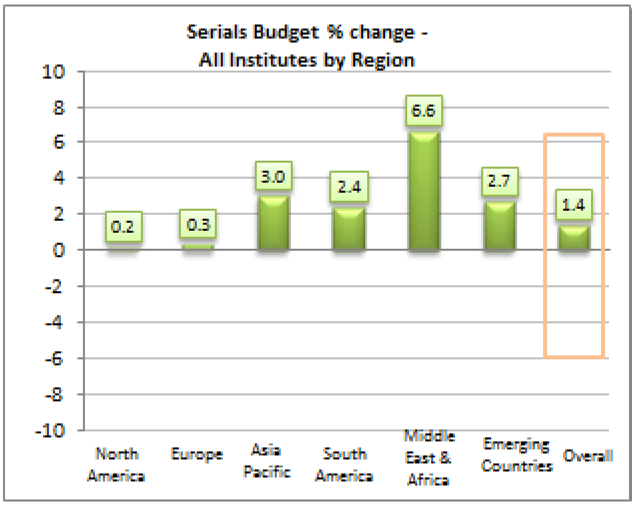


Figure 8

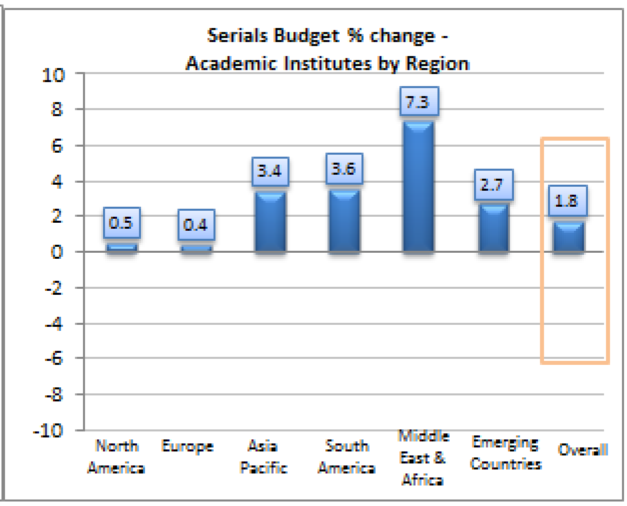


Figure 9

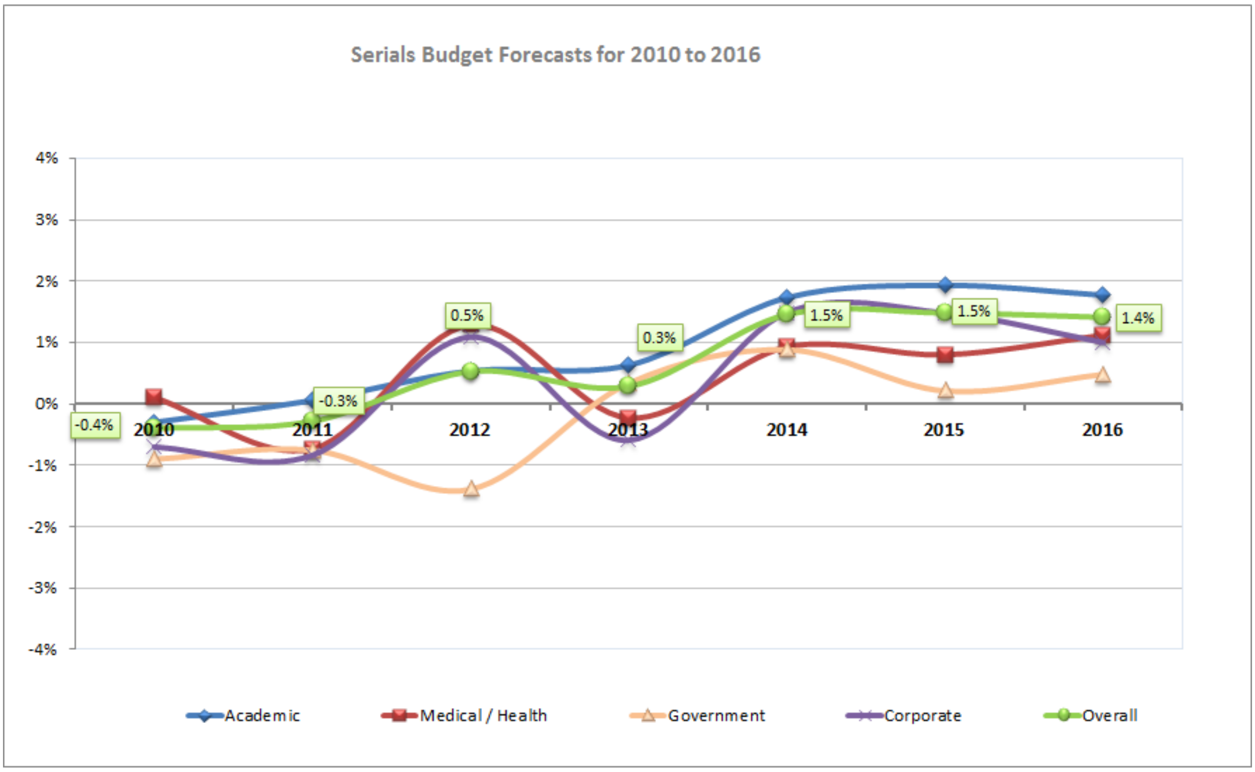


Figure 10

Table 10: Serials Budget Change for 2016					
		Qualitative Predictions % respondents predicting			*Quantitative Predictions*
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	51%	32%	17%	1.3
	Academic Middle	38%	38%	19%	0.3
	Academic Lower	38%	36%	26%	-0.1
	All Academic	*43%*	*35%*	*20%*	*0.5*
	Medical/Health	20%	58%	20%	-0.4
	Government	22%	48%	30%	-1.0
	Corporate	28%	69%	3%	0.5
	Overall	**34%**	**45%**	**19%**	**0.2**
Europe	Academic Top	31%	56%	8%	1.5
	Academic Middle	31%	44%	23%	0.3
	Academic Lower	30%	46%	22%	-0.5
	All Academic	*30%*	*48%*	*18%*	*0.4*
	Medical/Health	19%	57%	19%	-1.0
	Government	43%	43%	9%	1.8
	Corporate	25%	64%	11%	0.3
	Overall	**29%**	**52%**	**16%**	**0.3**
Asia Pacific	Academic Top	58%	33%	9%	3.4
	Academic Middle	49%	44%	5%	4.5
	Academic Lower	39%	52%	9%	2.4
	All Academic	*48%*	*43%*	*8%*	*3.4*
	Medical/Health	56%	31%	13%	4.0
	Government	24%	60%	16%	0.5
	Corporate	41%	53%	3%	2.0
	Overall	**46%**	**44%**	**9%**	**3.0**
South America	Academic Top	43%	43%	14%	4.3
	Academic Middle	29%	57%	0%	2.7
	Academic Lower	29%	71%	0%	3.6
	All Academic	*33%*	*57%*	*5%*	*3.6*
	Medical/Health	25%	75%	0%	1.8
	Government	20%	60%	0%	0.8
	Corporate	0%	100%	0%	-0.3
	Overall	**26%**	**65%**	**3%**	**2.4**
Middle East and Africa	Academic Top	50%	50%	0%	6.0
	Academic Middle	25%	50%	0%	2.5
	Academic Lower	100%	0%	0%	11.6
	All Academic	*58%*	*33%*	*0%*	*7.3*
	Medical/Health	50%	50%	0%	8.1
	Government	33%	33%	0%	2.7
	Corporate	50%	50%	0%	5.4
	Overall	**53%**	**37%**	**0%**	**6.6**
Emerging Countries	Academic Top	52%	36%	6%	3.5
	Academic Middle	32%	53%	6%	2.7
	Academic Lower	42%	45%	9%	1.9
	All Academic	*42%*	*45%*	*7%*	*2.7*
	Medical/Health	50%	38%	8%	4.6
	Government	20%	65%	5%	1.2
	Corporate	50%	38%	8%	2.2
	Overall	**42%**	**45%**	**7%**	**2.7**
Overall	Academic Top	48%	40%	11%	2.3
	Academic Middle	39%	44%	14%	1.8
	Academic Lower	37%	45%	18%	1.2
	All Academic	*41%*	*43%*	*14%*	***1.8***
	Medical/Health	33%	49%	16%	1.1
	Government	28%	53%	17%	0.5
	Corporate	30%	63%	6%	1.0

	Overall	36%	48%	14%	1.4

REASONS FOR DECREASE IN SERIALS BUDGET

Librarians were asked why they believed their budgets had changed.

- Altogether 93 librarians gave reasons as to why they thought it had decreased. Reduction in available funds stays as the top reason (50%). 34% ascribe the decrease to price inflation (from the viewpoint that their purchasing power is eroded). Currency fluctuation is a main cause of the decrease for 12% of respondents.

REASONS FOR INCREASE IN SERIALS BUDGET

- 249 librarians were able to specify why their budget had increased. The most often stated reason (52%) was due to price inflation, followed by price increase and new subscriptions (45%)

PLANS FOR SERIAL ADDITIONS AND CANCELLATIONS

Many libraries manage their budgets by cancelling and subscribing to different journals in order to minimize costs. It is quite feasible for an institute to see a decrease in their serials budget, but an increase in the number of journals purchased (through the acquisition of more inexpensive titles). Change is often based upon usage data, a desire to streamline particular subjects, or simply cancelling the most expensive titles.

- The percentage of institutes cancelling (41%) is higher than those adding (31%). This is reflected in the average number of cancellations (74.7) outstripping the number of additions (51.8).
- One Turkish Corporate organisation plans to add 5000. Although some other institutes in this segment predicted an increase in their serials holdings, none were able to estimate a quantity. Hence the figure given is not truly an “average” for the segment.
- One European Medical institute plans to cancel 5000. Only a few other institutes in this segment were able to give a figure for cancellations, so the figure for this segment is heavily skewed.
- Academic institutes plan to cancel 68 journals on average and add 53. Academic Top are expecting the greatest number of cancellations (129), and this is mainly driven by the European and North American markets.
- Those cancelling titles were asked to give the reason(s) behind the cancellation decisions. 65% stated that cancellations were made on journals that were no longer relevant or had low usage statistics. 42% indicated a lack of funds, whilst 38% mentioned the price of the journal (n.b. respondents were able to choose more than one reason for cancellation)

Table 11: Serials Additions in 2016						Serials Cancellations in 2016			
		Qualitative Predictions % respondents predicting			*Quantitative Predictions*	*Qualitative Predictions* % respondents predicting			*Quantitative Predictions*
Region	**Organisation**	Increase	No Additions	Unable to say	Ave no. of Additions	Cancels	No Cancels	Unable to say	Ave no. of Cancels
North America	Academic Top	56%	32%	12%	30.9	70%	28%	3%	126.9
	Academic Middle	44%	44%	12%	17.1	51%	27%	22%	22.2
	Academic Lower	40%	48%	13%	21.4	62%	26%	13%	27.3
	All Academic	*47%*	*41%*	*12%*	*23.6*	*61%*	*27%*	*13%*	*61.7*
	Medical/Health	34%	53%	13%	4.6	68%	26%	5%	14.5
	Government	22%	70%	9%	4.8	65%	26%	9%	35.5
	Corporate	23%	47%	30%	5.8	34%	48%	17%	8.7
	Overall	**38%**	**47%**	**15%**	**18.2**	**60%**	**30%**	**11%**	**43.4**
Europe	Academic Top	30%	22%	49%	59.6	62%	19%	41%	266.9
	Academic Middle	21%	45%	34%	195.8	50%	32%	32%	116.6
	Academic Lower	27%	30%	43%	10.0	38%	38%	30%	23.2
	All Academic	*26%*	*32%*	*42%*	*92.7*	*37%*	*29%*	*34%*	*143.0*
	Medical/Health	14%	36%	50%	13.0	45%	40%	43%	1104.0
	Government	33%	43%	24%	4.7	55%	33%	33%	8.0
	Corporate	22%	44%	33%	12.8	47%	41%	30%	6.9
	Overall	**24%**	**36%**	**40%**	**61.9**	**49%**	**33%**	**35%**	**237.8**
Asia Pacific	Academic Top	43%	50%	7%	11.1	63%	36%	17%	35.0
	Academic Middle	34%	57%	9%	29.7	49%	51%	7%	30.9
	Academic Lower	26%	53%	21%	82.3	35%	57%	11%	9.3
	All Academic	*34%*	*53%*	*12%*	*47.1*	*40%*	*48%*	*12%*	*25.8*
	Medical/Health	28%	67%	5%	30.0	46%	55%	18%	8.3
	Government	32%	64%	4%	4.0	64%	64%	4%	3.6
	Corporate	25%	56%	19%	5.6	61%	39%	15%	21.5
	Overall	**32%**	**57%**	**11%**	**36.8**	**52%**	**50%**	**12%**	**19.2**
South America	Academic Top	17%	50%	33%	0.0	50%	29%	43%	5.0
	Academic Middle	20%	20%	60%	20.0	17%	14%	71%	4.0
	Academic Lower	14%	43%	43%	5.0	20%	43%	43%	10.0
	All Academic	*17%*	*39%*	*44%*	*8.0*	*19%*	*29%*	*52%*	*8.0*
	Medical/Health	25%	0%	75%	0.0	0%	20%	60%	0.0
	Government	0%	25%	75%	0.0	33%	25%	75%	0.0
	Corporate	20%	80%	0%	10.0	0%	80%	20%	0.0
	Overall	**16%**	**39%**	**45%**	**8.7**	**21%**	**34%**	**51%**	**8.0**
Middle East and Africa	Academic Top	75%	25%	0%	20.0	0%	50%	25%	25.0
	Academic Middle	25%	25%	50%	4.0	33%	33%	67%	2.0
	Academic Lower	50%	25%	25%	717.4	0%	33%	33%	1.3
	All Academic	*50%*	*25%*	*25%*	*476.5*	*20%*	*40%*	*40%*	*13.6*
	Medical/Health	50%	50%	0%	0.0	0%	67%	0%	0.0
	Government	50%	0%	50%	2.0	0%	33%	33%	5.0
	Corporate	50%	50%	0%	5000.0	0%	67%	33%	0.0
	Overall	**50%**	**28%**	**22%**	**977.8**	**6%**	**47%**	**32%**	**5.0**
Emerging Countries	Academic Top	45%	27%	27%	13.1	33%	39%	27%	9.0
	Academic Middle	42%	39%	18%	269.4	24%	52%	24%	6.5
	Academic Lower	29%	41%	29%	311.5	12%	67%	21%	2.4
	All Academic	*39%*	*36%*	*25%*	*215.5*	*23%*	*53%*	*24%*	*7.2*
	Medical/Health	26%	43%	30%	62.0	4%	58%	38%	0.0
	Government	35%	35%	30%	2.8	10%	62%	29%	3.7
	Corporate	44%	44%	11%	540.0	46%	38%	15%	37.5
	Overall	**38%**	**38%**	**24%**	**227.5**	**22%**	**52%**	**25%**	**14.2**
Overall	Academic Top	43%	35%	22%	32.5	50%	29%	21%	129.0
	Academic Middle	33%	47%	21%	55.0	42%	36%	22%	48.7
	Academic Lower	31%	43%	26%	70.8	40%	41%	19%	20.8
	All Academic	*36%*	*42%*	*23%*	**52.9**	*44%*	*35%*	*21%*	**68.2**
	Medical/Health	26%	50%	24%	14.8	38%	40%	22%	171.6
	Government	27%	57%	16%	4.5	40%	41%	19%	20.2
	Corporate	24%	51%	25%	163.6	34%	45%	21%	12.2
	Overall	**31%**	**46%**	**23%**	**51.8**	**41%**	**38%**	**21%**	**74.7**

ELECTRONIC JOURNALS AND BREAKDOWN OF SERIAL SUBSCRIPTION INTO FORMAT TYPE

Librarians were asked if they took an e-journal service and if they did, what proportion of their subscriptions were received in electronic form.

- 98% of institutes surveyed currently use e-journal service providers.
- The proportion of journals taken in e-only format is 63% while the subscription in combined format drops two points to 15%. Just under a quarter of subscriptions are taken in the print only format (22%).
- 100% of North American institutes have electronic journal services and just 13% have print only subscriptions. South America continues to have the heaviest reliance on print only journals at 39%.
- Academic Top institutes are more likely to take e-only subscriptions (68%) than other segments and have 100% take-up of electronic journal services.

Table 12:Breakdown of serials subscriptions into format type in 2015					
		% of journals received in different formats			% of institutes using electronic journal services
		% respondents predicting			
Region	**Organisation**	e-only	Comb	Print	
North America	Academic Top	81%	8%	11%	100%
	Academic Middle	78%	9%	12%	100%
	Academic Lower	78%	11%	11%	100%
	All Academic	*79%*	*9%*	*12%*	*100%*
	Medical/Health	69%	17%	14%	100%
	Government	70%	16%	15%	100%
	Corporate	79%	7%	15%	100%
	Overall	**76%**	**11%**	**13%**	**100%**
Europe	Academic Top	59%	20%	22%	100%
	Academic Middle	55%	21%	24%	100%
	Academic Lower	50%	20%	30%	97%
	All Academic	*55%*	*20%*	*25%*	*99%*
	Medical/Health	61%	15%	24%	100%
	Government	50%	16%	33%	100%
	Corporate	53%	17%	29%	96%
	Overall	**55%**	**18%**	**26%**	**99%**
Asia Pacific	Academic Top	68%	13%	19%	100%
	Academic Middle	70%	10%	20%	95%
	Academic Lower	50%	14%	36%	95%
	All Academic	*63%*	*13%*	*25%*	*97%*
	Medical/Health	62%	15%	23%	97%
	Government	50%	19%	31%	85%
	Corporate	64%	12%	24%	91%
	Overall	**62%**	**14%**	**25%**	**95%**
South America	Academic Top	43%	18%	38%	100%
	Academic Middle	26%	24%	49%	100%
	Academic Lower	34%	36%	31%	100%
	All Academic	*35%*	*26%*	*39%*	*100%*
	Medical/Health	30%	15%	55%	80%
	Government	30%	23%	47%	100%
	Corporate	34%	50%	16%	100%
	Overall	**33%**	**28%**	**39%**	**97%**
Middle East and Africa	Academic Top	76%	3%	22%	100%
	Academic Middle	77%	4%	19%	100%
	Academic Lower	70%	15%	15%	100%
	All Academic	*74%*	*8%*	*18%*	*100%*
	Medical/Health	65%	6%	29%	100%
	Government	23%	0%	77%	67%
	Corporate	50%	8%	42%	67%
	Overall	**65%**	**7%**	**28%**	**89%**
Emerging Countries	Academic Top	62%	15%	23%	100%
	Academic Middle	55%	18%	26%	91%
	Academic Lower	38%	28%	34%	91%
	All Academic	*52%*	*20%*	*28%*	*94%*
	Medical/Health	59%	21%	20%	96%
	Government	29%	23%	48%	90%
	Corporate	60%	20%	20%	93%
	Overall	**52%**	**21%**	**28%**	**94%**
Overall	Academic Top	68%	13%	18%	100%
	Academic Middle	66%	14%	20%	98%
	Academic Lower	58%	16%	26%	98%
	All Academic	*64%*	*14%*	*21%*	***99%***
	Medical/Health	63%	16%	22%	98%
	Government	55%	17%	29%	95%
	Corporate	64%	14%	22%	95%
	Overall	**63%**	**15%**	**22%**	**98%**

EXPENDITURE ON ELECTRONIC SERIALS

- Within the serials budget the proportion spent on electronic information source is 63%. North America continues to have the greatest proportional spend on electronic serials (77%). South America has the least (40%).

Table 13: Percentage of Serials Expenditure on Electronic Serials (Current year)

Region	Organisation	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
North America	Academic Top	23	42	48	69	65	80	81	81	78	84
	Academic Middle	25	39	48	63	64	75	78	76	74	74
	Academic Lower	14	21	32	55	62	65	68	79	70	75
	All Academic	*21*	*35*	*44*	*62*	*64*	*73*	*75*	*79*	*74*	*78*
	Medical/Health	32	34	31	40	57	64	55	73	73	76
	Government	40	50	45	54	60	64	58	77	64	69
	Corporate	39	40	27	48	69	75	73	80	77	79
	Overall	**26**	**37**	**40**	**55**	**63**	**71**	**69**	**78**	**73**	**77**
Europe	Academic Top	31	40	45	52	52	57	56	65	57	61
	Academic Middle	35	42	42	49	43	54	49	56	52	58
	Academic Lower	36	33	44	51	50	55	54	54	49	52
	All Academic	*34*	*38*	*44*	*51*	*48*	*56*	*53*	*58*	*53*	*57*
	Medical/Health	38	38	42	38	44	53	47	63	55	62
	Government	38	44	38	55	54	47	39	49	39	58
	Corporate	43	38	41	36	45	58	43	59	46	57
	Overall	**36**	**39**	**42**	**47**	**48**	**55**	**49**	**58**	**51**	**58**
Asia Pacific	Academic Top	24	38	35	40	61	56	64	67	70	65
	Academic Middle	33	49	40	45	48	54	47	62	61	60
	Academic Lower	26	41	35	39	41	47	50	54	42	40
	All Academic	*27*	*43*	*37*	*42*	*49*	*52*	*54*	*61*	*58*	*55*
	Medical/Health	9	34	29	33	52	42	55	70	61	65
	Government	31	31	44	35	43	46	42	45	50	60
	Corporate	18	37	39	40	47	54	52	55	60	61
	Overall	**25**	**41**	**37**	**40**	**49**	**50**	**53**	**60**	**58**	**58**
South America	Academic Top	n/a	n/a	38	41	41	42	43	44	53	46
	Academic Middle	n/a	n/a	41	41	39	42	41	41	33	27
	Academic Lower	n/a	n/a	21	23	23	26	28	47	45	41
	All Academic	*n/a*	*n/a*	*34*	*34*	*34*	*37*	*37*	*44*	*44*	*38*
	Medical/Health	n/a	n/a	50	27	27	30	31	34	41	28
	Government	n/a	n/a	15	15	15	21	35	46	34	38
	Corporate	n/a	n/a	15	15	15	21	33	60	42	55
	Overall	**n/a**	**n/a**	**32**	**31**	**31**	**34**	**36**	**43**	**42**	**40**
Middle East and Africa	Academic Top	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	70	67
	Academic Middle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	80	73
	Academic Lower	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	68	75
	All Academic	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*73*	*71*
	Medical/Health	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	70	66
	Government	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	21	60
	Corporate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	50	41
	Overall	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**63**	**66**
Emerging Countries	Academic Top	n/a	n/a	27	34	45	45	49	58	51	50
	Academic Middle	n/a	n/a	31	39	35	44	40	53	47	46
	Academic Lower	n/a	n/a	34	31	37	35	30	48	42	38
	All Academic	*n/a*	*n/a*	*31*	*35*	*39*	*41*	*40*	*53*	*47*	*44*
	Medical/Health	n/a	n/a	38	31	31	30	37	58	58	67
	Government	n/a	n/a	17	38	29	31	22	42	36	46
	Corporate	n/a	n/a	29	30	41	43	31	51	53	63
	Overall	**n/a**	**n/a**	**29**	**34**	**38**	**39**	**37**	**53**	**48**	**51**
Overall	Academic Top	26	41	44	52	58	63	64	70	69	69
	Academic Middle	30	43	43	49	50	59	55	63	62	63
	Academic Lower	24	33	36	45	48	53	54	61	55	55
	All Academic	*27*	*39*	*41*	***48***	***52***	***58***	***58***	***65***	***62***	***62***
	Medical/Health	30	36	36	36	49	53	50	66	64	66
	Government	37	43	41	48	52	52	45	57	50	61
	Corporate	35	39	34	39	53	61	54	65	62	65
	Overall	**29**	**39**	**40**	**45**	**52**	**57**	**55**	**64**	**61**	**63**

E-JOURNAL BUDGETS

- 55% of institutions expect their spending on electronic resources to increase in 2016. Overall, spending on electronic resources is set to rise by 4.1%.
- Two thirds (65%) of North American institutes expect an increase in electronic resource funding. South America predicts the lowest figures – both in proportion of those expecting an increase (38%) and the total percentage change in spending (2.8% increase). Middle East and Africa expect an 11% increase on electronic resource spending in 2016.

Table 14: Electronic resource spending in 2016

	Qualitative predictions			Quantitative predictions
Region	Increase	Remain the same	Decrease	% change
North America	65%	28%	7%	3.9%
Europe	45%	44%	6%	3.3%
Asia Pacific	57%	35%	6%	4.7%
South America	38%	56%	6%	2.8%
Middle East and Africa	56%	33%	0%	11.0%
Emerging Countries	48%	42%	4%	4.5%
Total	55%	36%	6%	4.1%

ABSTRACTING AND INDEXING SERVICES

- The majority of institutes (88%) provide electronic access to abstracting and indexing (A&I) services.
- **% Budget Change:** 65% of institutions believe that their A&I budget will remain static in 2016, whilst 22% expect an increase. An average increase in spending of 1.0% is expected.
- **Number of A&I Services Taken**: Of the institutes that provide access to A&I databases, the majority (80%) take two or more A&I services. 46% took four or more.

Table 15: Abstracting & Indexing Budget Predictions for 2016

Forecast	%	Mean %	n
Increase	21.6	7.4	145
Same	65.0	0.0	436
Decrease	4.9	-12.9	33
Don't Know	8.4	-	57
Total	100.0	1.0	686

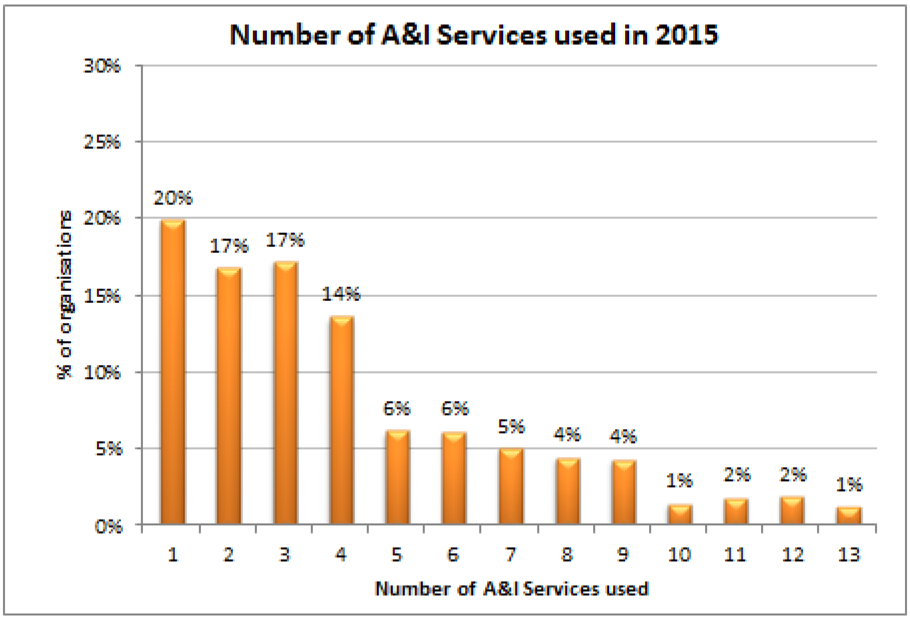


Figure 11

AWARENESS OF INSTITUTIONAL SEARCH AND DISCOVERY SERVICES

Increasingly, there are services available to libraries that help improve discovery and access to resources held by the library. A new set of questions were added to this year's survey to capture information about this up and coming service. Overall, 76% of respondents are aware of such services, with this being more predominant in the academic sector (84%). Least aware is the Government sector (61%). Regionally, awareness is strongest in North America (89%) and weakest in South America (41%).

Table 16: Awareness of discovery services

Organisation	Awareness	
	Yes	No
Academic Top	88%	12%
Academic Middle	83%	17%
Academic Lower	80%	20%
All Academic	*84%*	*16%*
Medical/Health	65%	35%
Government	61%	39%
Corporate	71%	29%
Overall	***76%***	***24%***

Table 17: Awareness of discovery services

Region	Awareness	
	Yes	No
North America	89%	11%
Europe	73%	27%
Asia Pacific	72%	28%
South America	41%	59%
Middle East and Africa	69%	31%
Overall	***76%***	***24%***

Respondents were then asked if they had already, or were considering, purchasing a search and discovery service. Overall, 28% of those already aware of discovery tools have already purchased one. A further 10% are planning to purchase. Take-up is highest in the Academic sector (33%), with Government having the strongest purchasing intentions (18%). Regionally, take-up is lowest in Europe at just 13%. Only 7% plan a purchase, making Europe the least likely to have discovery services. Of those who have already purchased or are planning to purchase a discovery tool, 45% say this cost will be covered by a budget line outside of the A&I budget, whilst 43% say the A&I budget will cover these costs.

Table 18: Purchase intention of discovery services - Organisation			
Organisation	Intention		
	Planning to purchase	Have already purchased	Have not purchased/ do not plan to purchase
Academic Top	7%	36%	57%
Academic Middle	10%	36%	54%
Academic Lower	13%	27%	61%
All Academic	*10%*	*33%*	*57%*
Medical/Health	4%	19%	77%
Government	18%	11%	71%
Corporate	14%	24%	62%
Overall	***10%***	***28%***	***62%***

Table 19: Purchase intention of discovery services - Region			
Region	Intention		
	Planning to purchase	Have already purchased	Have not purchased/ do not plan to purchase
North America	13%	32%	55%
Europe	7%	13%	80%
Asia Pacific	10%	36%	54%
South America	8%	23%	69%
Middle East and Africa	11%	44%	44%
Overall	***10%***	***28%***	***62%***

REFERENCE MANAGEMENT TOOLS

Librarians were asked if they currently provide reference management tools to their users. Overall, 58% do so, with provision being more common in academic institutes (68%). Regionally, Middle East and Africa have greatest uptake at 65%. North America is close behind at 64%. Asia Pacific is least likely to provide reference management tools (49%).

Table 20: Provision of reference management tools			
Organisation	Do you provide Ref. Man. Tools?		
	Yes	No	Don't know
Academic Top	78%	19%	2%
Academic Middle	69%	26%	5%
Academic Lower	57%	39%	4%
All Academic	*68%*	*28%*	*4%*
Medical/Health	47%	50%	2%
Government	43%	51%	5%
Corporate	41%	59%	0%
Overall	***58%***	***39%***	***3%***

Table 21: Provision of reference management tools			
Region	Do you provide Ref. Man. Tools?		
	Yes	No	Don't know
North America	64%	34%	1%
Europe	62%	34%	5%
Asia Pacific	49%	48%	3%
South America	53%	44%	3%
Middle East and Africa	65%	29%	6%
Overall	***58%***	***39%***	***3%***

Only 10% plan to purchase a reference management tool in the future:

Table 22: Future plans to purchase		
Organisation	Do you plan to purchase Ref. Man. tools?	
	Yes	No
Academic Top	12%	88%
Academic Middle	15%	85%
Academic Lower	14%	86%
All Academic	*13%*	*87%*
Medical/Health	12%	88%
Government	1%	99%
Corporate	3%	97%
Overall	***10%***	***90%***

Table 23: Future plans to purchase		
Region	Do you plan to purchase Ref. Man. tools?	
	Yes	No
North America	6%	94%
Europe	5%	95%
Asia Pacific	19%	81%
South America	3%	97%
Middle East and Africa	27%	73%
Overall	***10%***	***90%***

363 respondents were able to estimate the 2016 budget spend on reference management tools. On average, these expect their expenditure to decrease by 0.2% in 2016. The majority (83%) believed their budget would remain static. 13% expected an increase. Most of these institutes expected a single figure percentage rise, although one institute expected a 100% rise. Only 4% predicted a decrease in budget, but the percentage values were much steeper here. 5 institutes expected to cut their reference management tools spending completely in 2016.

BOOKS EXPENDITURE

BOOKS BUDGET CHANGE FOR 2016

- **Books budgets**, which includes electronic books, are predicted to increase by **1.3%** in 2016 (last year was 0.7%).
  - **Regions: Europe** is the only area to predict a decrease for 2016 at -0.4%. **North American** budgets (1.9%) show their healthiest increase for some time – we have not seen a positive prediction here since 2009. **Asia Pacific's** 2% increase is broadly stable with last year (2.2%)
  - **South America** expects an increase of 1.8% - down by some margin from last year's 4.6% increase. **Middle East and Africa** outperforms the other regions with a 3.0% increase
  - **Emerging countries** predict a 3.9% increase, broadly stable to last year (4.0%)
  - Amongst the **academic** budgets, North America and Europe each expect a downturn (-0.3%). South America academic institutes will increase by 4.9%. Overall, Medical is the strongest performing sector with a 4.2% rise

- **Qualitative forecasts** indicate that the majority (54%) of institutes believe their budgets will remain static. 26% of institutes predict that their budget expenditure for 2016 will increase, 16% are predicting a decrease.

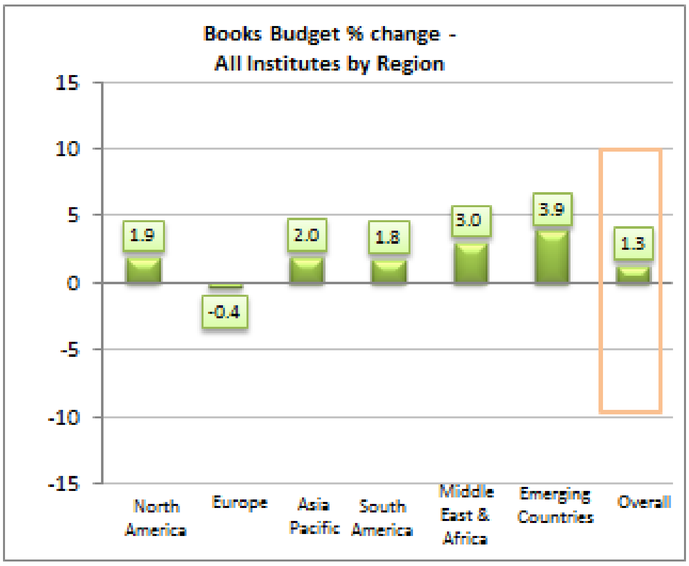


Figure 12

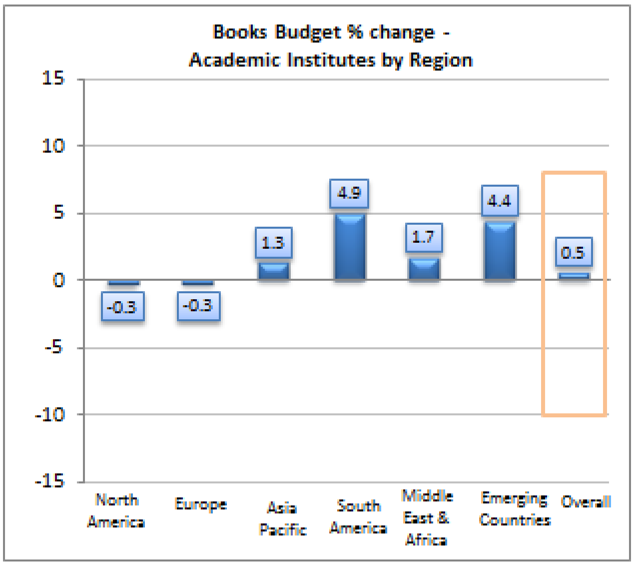


Figure 13

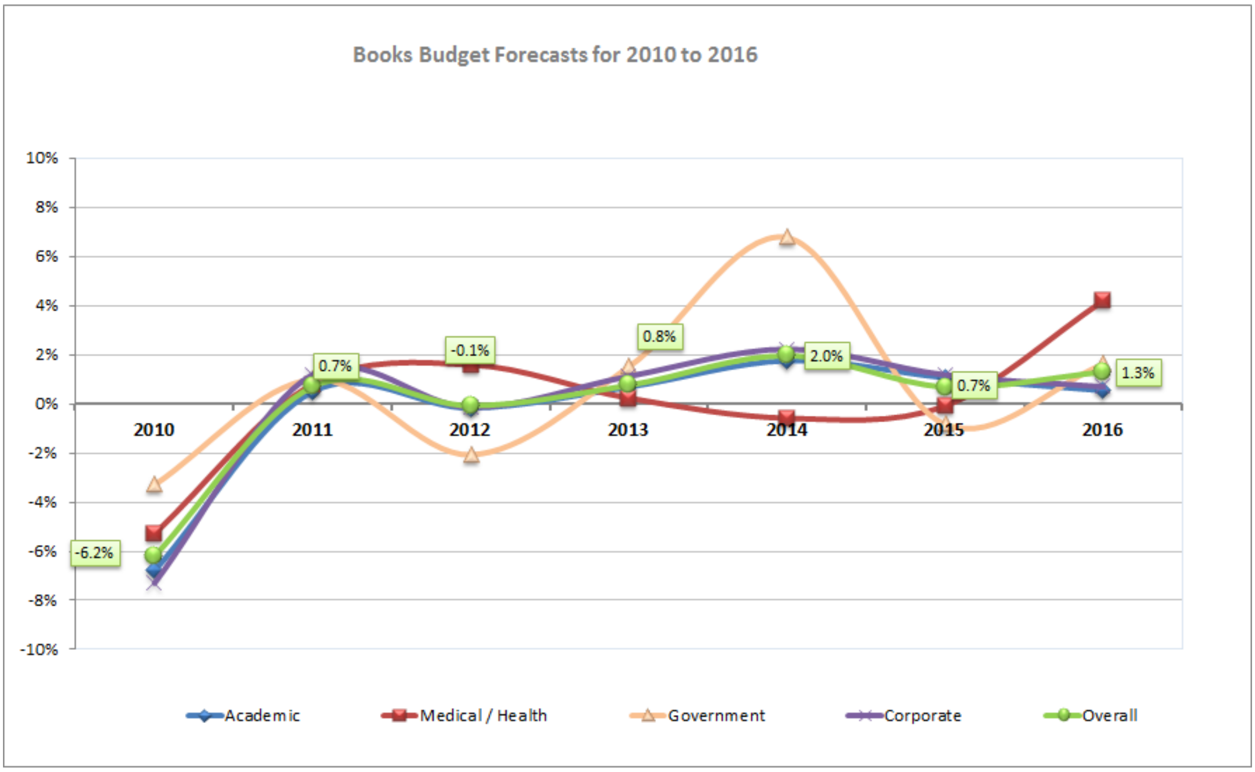


Figure 14

Table 24: Books Budget Change for 2016					
		Qualitative Predictions			*Quantitative Predictions*
		% respondents predicting			
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	22%	49%	27%	-1.6
	Academic Middle	27%	46%	20%	-0.3
	Academic Lower	32%	42%	26%	1.0
	All Academic	*27%*	*46%*	*24%*	*-0.3*
	Medical/Health	38%	51%	11%	6.0
	Government	26%	61%	13%	0.9
	Corporate	32%	64%	4%	6.3
	Overall	**29%**	**51%**	**18%**	**1.9**
Europe	Academic Top	14%	57%	24%	-2.1
	Academic Middle	26%	55%	16%	0.9
	Academic Lower	18%	61%	13%	0.3
	All Academic	*19%*	*58%*	*18%*	*-0.3*
	Medical/Health	9%	74%	9%	-0.2
	Government	5%	82%	9%	-0.5
	Corporate	21%	63%	4%	-1.0
	Overall	**16%**	**64%**	**13%**	**-0.4**
Asia Pacific	Academic Top	31%	57%	12%	1.5
	Academic Middle	27%	50%	23%	0.1
	Academic Lower	41%	41%	18%	2.2
	All Academic	*48%*	*48%*	*5%*	*1.3*
	Medical/Health	33%	46%	13%	5.9
	Government	8%	62%	19%	3.9
	Corporate	25%	53%	16%	-1.1
	Overall	**29%**	**51%**	**17%**	**2.0**
South America	Academic Top	50%	50%	0%	7.0
	Academic Middle	57%	43%	0%	5.8
	Academic Lower	38%	50%	13%	2.3
	All Academic	*48%*	*48%*	*5%*	*4.9*
	Medical/Health	50%	50%	0%	3.5
	Government	40%	60%	0%	3.5
	Corporate	0%	60%	40%	-12.7
	Overall	**40%**	**51%**	**9%**	**1.8**
Middle East and Africa	Academic Top	75%	25%	0%	3.7
	Academic Middle	50%	25%	25%	2.2
	Academic Lower	20%	60%	20%	-0.1
	All Academic	*46%*	*38%*	*15%*	*1.7*
	Medical/Health	100%	0%	0%	13.4
	Government	50%	50%	0%	3.8
	Corporate	0%	100%	0%	0.0
	Overall	**47%**	**42%**	**11%**	**3.0**
Emerging Countries	Academic Top	48%	45%	0%	4.5
	Academic Middle	50%	41%	9%	3.2
	Academic Lower	59%	35%	3%	5.3
	All Academic	*53%*	*40%*	*4%*	*4.4*
	Medical/Health	48%	26%	13%	9.7
	Government	21%	74%	0%	7.3
	Corporate	23%	42%	31%	-5.2
	Overall	**44%**	**43%**	**9%**	**3.9**
Overall	Academic Top	25%	53%	20%	-0.2
	Academic Middle	29%	50%	18%	0.5
	Academic Lower	32%	48%	18%	1.2
	All Academic	*29%*	*50%*	*19%*	***0.5***
	Medical/Health	28%	56%	11%	4.2
	Government	15%	68%	12%	1.6
	Corporate	24%	59%	11%	0.7

	Overall	26%	54%	16%	1.3

BOOKS PRINT AND ELECTRONIC BUDGET CHANGE FOR 2016

- Librarians were asked to predict the changes for both the print and electronic book budget. It is clear that the print books budget is being reduced in favour of the electronic budget. These figures will not exactly tally with the overall books budget due to the varying proportions of print vs electronic in each institute. It should be noted that there were a high proportion of librarians who answered "don't know" (12% for the print budget and 16% for the electronic budget). Therefore, base sizes for the quantitative predictions are lower than in other areas of the study.
  - **Regions: North America** expects the biggest decline in print book spending (-4.4%), but one of the strongest increases in e-book spending (6.2%) **Overall**, the print book budget is expected to fall by 2.9% whilst the electronic budget is anticipated to rise by 5.1%.

- **Qualitative forecasts** indicate that 14% of institutions expect to increase their print books spend compared to 42% predicting a rise in electronic book budgets. Only 3% of institutes anticipate a decrease in their electronic budget whereas 33% forecast a decrease for print books.

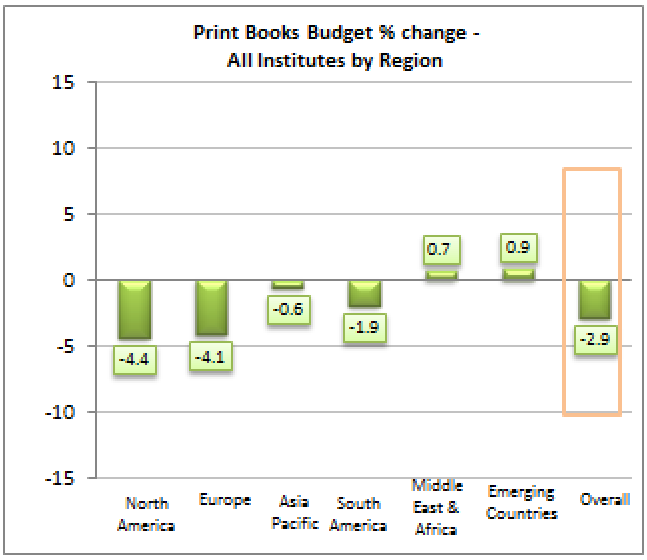


Figure 15

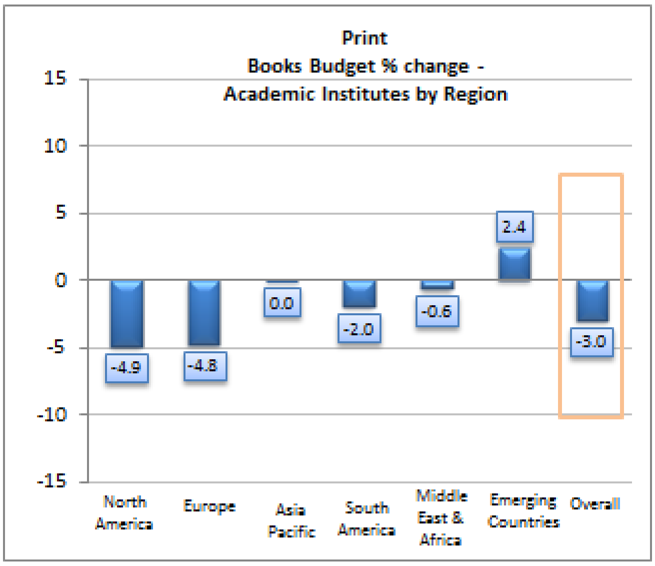


Figure 16

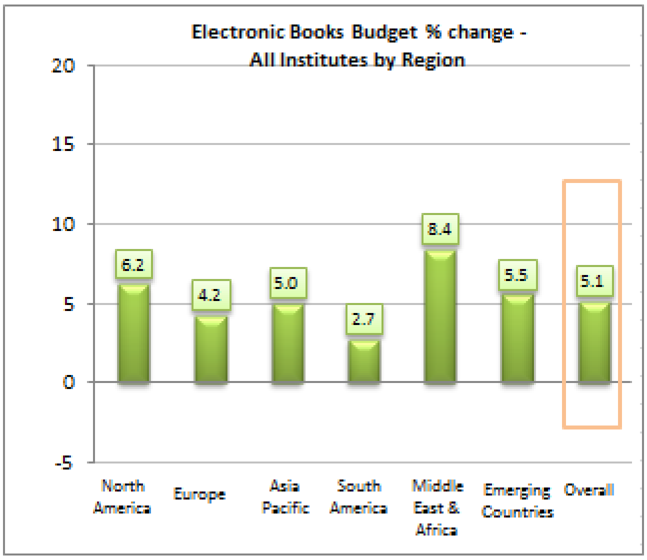


Figure 17

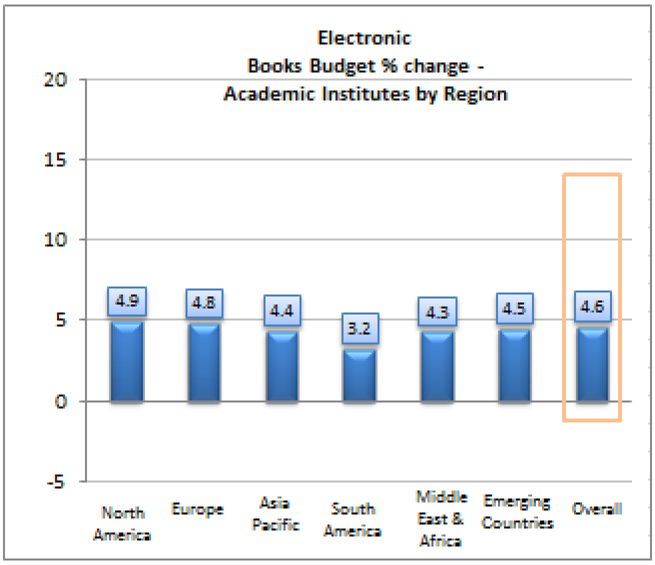


Figure 18

Table 25: Print Books Budget Change for 2016					
		Qualitative Predictions % respondents predicting			*Quantitative Predictions*
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	12%	34%	51%	-5.1
	Academic Middle	12%	34%	49%	-4.6
	Academic Lower	10%	41%	46%	-5.0
	All Academic	*12%*	*36%*	*49%*	*-4.9*
	Medical/Health	28%	33%	31%	-7.4
	Government	4%	74%	22%	-3.9
	Corporate	13%	50%	27%	1.6
	Overall	**14%**	**42%**	**39%**	**-4.4**
Europe	Academic Top	3%	47%	37%	-5.0
	Academic Middle	15%	36%	41%	-3.7
	Academic Lower	8%	29%	45%	-5.7
	All Academic	*9%*	*37%*	*41%*	*-4.8*
	Medical/Health	5%	51%	27%	-3.6
	Government	0%	55%	32%	-4.0
	Corporate	14%	36%	18%	-1.8
	Overall	**8%**	**42%**	**34%**	**-4.1**
Asia Pacific	Academic Top	18%	32%	41%	-1.6
	Academic Middle	23%	42%	35%	-1.3
	Academic Lower	30%	47%	23%	2.7
	All Academic	*24%*	*40%*	*33%*	*0.0*
	Medical/Health	26%	31%	18%	1.3
	Government	8%	40%	16%	9.9
	Corporate	6%	41%	28%	-12.9
	Overall	**20%**	**38%**	**28%**	**-0.6**
South America	Academic Top	14%	57%	29%	-1.7
	Academic Middle	0%	67%	33%	-2.4
	Academic Lower	17%	50%	33%	-1.8
	All Academic	*11%*	*58%*	*32%*	*-2.0*
	Medical/Health	0%	75%	25%	-0.9
	Government	0%	100%	0%	0.0
	Corporate	0%	60%	40%	-4.3
	Overall	**6%**	**66%**	**28%**	**-1.9**
Middle East and Africa	Academic Top	25%	25%	0%	0.6
	Academic Middle	25%	25%	25%	-0.3
	Academic Lower	20%	40%	20%	-1.4
	All Academic	*23%*	*31%*	*15%*	*-0.6*
	Medical/Health	0%	50%	0%	2.9
	Government	33%	33%	0%	6.7
	Corporate	0%	67%	0%	0.0
	Overall	**19%**	**38%**	**10%**	**0.7**
Emerging Countries	Academic Top	21%	36%	33%	-0.5
	Academic Middle	32%	47%	15%	0.8
	Academic Lower	41%	41%	6%	7.1
	All Academic	*32%*	*42%*	*18%*	*2.4*
	Medical/Health	38%	29%	21%	4.4
	Government	15%	55%	20%	9.4
	Corporate	15%	33%	37%	-15.4
	Overall	**28%**	**40%**	**22%**	**0.9**
Overall	Academic Top	11%	38%	42%	-3.7
	Academic Middle	17%	39%	40%	-3.0
	Academic Lower	17%	39%	37%	-2.2
	All Academic	*15%*	*39%*	*40%*	***-3.0***
	Medical/Health	19%	40%	24%	-3.4
	Government	5%	58%	21%	0.0
	Corporate	9%	44%	25%	-4.2
	Overall	**14%**	**42%**	**33%**	**-2.9**

Table 26: Electronic Books Budget Change for 2016					
		Qualitative Predictions *% respondents predicting*			*Quantitative Predictions*
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	58%	38%	3%	3.7
	Academic Middle	60%	30%	5%	4.5
	Academic Lower	60%	25%	8%	6.7
	All Academic	*59%*	*31%*	*5%*	*4.9*
	Medical/Health	56%	33%	0%	10.9
	Government	41%	45%	5%	5.7
	Corporate	43%	43%	0%	5.8
	Overall	**55%**	**35%**	**3%**	**6.2**
Europe	Academic Top	38%	41%	3%	3.7
	Academic Middle	42%	42%	3%	5.0
	Academic Lower	43%	30%	3%	5.8
	All Academic	*41%*	*38%*	*3%*	*4.8*
	Medical/Health	27%	49%	8%	2.9
	Government	36%	45%	0%	4.5
	Corporate	32%	29%	11%	3.4
	Overall	**37%**	**39%**	**5%**	**4.2**
Asia Pacific	Academic Top	47%	35%	0%	4.6
	Academic Middle	40%	56%	5%	3.1
	Academic Lower	43%	43%	2%	5.5
	All Academic	*43%*	*45%*	*2%*	*4.4*
	Medical/Health	31%	33%	0%	4.5
	Government	20%	44%	0%	5.3
	Corporate	30%	36%	0%	8.8
	Overall	**37%**	**41%**	**1%**	**5.0**
South America	Academic Top	33%	67%	0%	4.2
	Academic Middle	33%	67%	0%	4.2
	Academic Lower	29%	57%	14%	1.4
	All Academic	*32%*	*63%*	*5%*	*3.2*
	Medical/Health	20%	60%	0%	1.0
	Government	0%	100%	0%	0.0
	Corporate	40%	60%	0%	4.3
	Overall	**27%**	**67%**	**3%**	**2.7**
Middle East and Africa	Academic Top	20%	0%	20%	0.8
	Academic Middle	40%	20%	20%	4.7
	Academic Lower	50%	25%	0%	5.6
	All Academic	*36%*	*14%*	*14%*	*4.3*
	Medical/Health	0%	50%	0%	6.6
	Government	50%	0%	0%	61.7
	Corporate	0%	50%	0%	0.8
	Overall	**30%**	**20%**	**10%**	**8.4**
Emerging Countries	Academic Top	53%	29%	3%	5.2
	Academic Middle	39%	52%	3%	3.4
	Academic Lower	37%	37%	3%	5.0
	All Academic	*43%*	*39%*	*3%*	*4.5*
	Medical/Health	43%	35%	0%	5.9
	Government	24%	62%	0%	7.3
	Corporate	44%	37%	4%	8.0
	Overall	**41%**	**41%**	**2%**	**5.5**
Overall	Academic Top	47%	37%	2%	4.0
	Academic Middle	46%	44%	5%	4.1
	Academic Lower	48%	35%	4%	5.8
	All Academic	*47%*	*38%*	*4%*	***4.6***
	Medical/Health	36%	40%	2%	6.2
	Government	31%	47%	1%	5.6
	Corporate	35%	37%	3%	5.9
	Overall	**42%**	**39%**	**3%**	**5.1**

NEW BOOKS IN 2015

We asked librarians to indicate whether or not the number of books purchased this year represented a decrease or increase when compared to the previous year.

- Librarians estimate that the number of books purchased this year will rise compared to 2014 (1.8% change).
- We also asked librarians how many books they purchased this year. Approximately 20% of respondents were not able to answer this question. The average amount of books is 15,194.

Table 27: Book purchasing in 2015 compared to 2014

Movement of books 15 against 14	Count	%	Mean %
Increase	115	17%	24.2
Same	394	18%	0.0
Decrease	121	60%	-13.1
Don't know	33	5%	
Total	663	100%	1.8

Table 28: Average Number of books in 2015 per institute type

Institution	Mean	Count
Academic Top	31,234	113
Academic Middle	19,017	109
Academic Lower	5,437	107
Medical/Health	7,725	101
Government	25,635	59
Corporate	2,026	79
Overall	15,194	567

PERCENTAGE OF BOOKS BUDGET SPENT ON ELECTRONIC BOOKS IN 2015

- Librarians were asked to estimate the proportion of their book budget spent on electronic books. This rises to 29.7% for 2015 compared to 26.7% last year. Only Academic Lower report a lower proportional spend on e-books in 2015 compared to 2014 albeit marginal (24.7% for 2015 compared to 25.3% previously). The biggest jump this year belongs to Corporate, who have increased 7.5%. The Government figure rises, but by a much smaller proportion than the very large jump reported between 2013 and 2014.

Table 29: Library Book Budget - % spent on electronic books

Region	Organisation	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Overall	Academic Top	3.3	5.7	4.7	8.3	14.1	22.4	18.3	19.9	27.8	30.9
	Academic Middle	3.2	5.9	5.6	8.5	9.0	14.8	17.7	16.8	22.1	25.7
	Academic Lower	3.0	5.7	5.1	8.0	7.1	15.7	15.4	19.9	25.3	24.7
	All Academic	*3.2*	*5.8*	*3.2*	*8.3*	*10.0*	*17.6*	*17.1*	*18.9*	*25.0*	*27.0*
	Medical/Health	2.0	5.9	3.7	6.5	4.8	15.0	17.5	21.0	33.9	36.4
	Government	2.6	9.2	5.9	2.4	9.4	10.9	7.7	11.8	24.2	28.7
	Corporate	4.6	3.8	3.5	2.7	11.5	16.8	11.5	20.9	26.6	34.1
	Overall	**3.1**	**6.0**	**4.9**	**6.6**	**9.4**	**16.3**	**15.5**	**18.8**	**26.7**	**29.7**

PROPORTION OF FRONT LIST BOOKS

Librarians were asked to give the proportion of books bought in 2015 that were front list and also to estimate the proportion of front list books for 2016. Overall, 69% of books purchased are front list. A slightly lower proportion of front list purchases are anticipated next year (67%). Differences per sector are minimal across the two years.

Table 30: Proportion of front list books

Region	Organisation	2015	2016
North America	Academic Top	78%	76%
	Academic Middle	67%	66%
	Academic Lower	58%	59%
	All Academic	*68%*	*67%*
	Medical/Health	68%	69%
	Government	63%	63%
	Corporate	56%	57%
	Overall	**66%**	**66%**
Europe	Academic Top	80%	83%
	Academic Middle	78%	82%
	Academic Lower	75%	78%
	All Academic	*78%*	*81%*
	Medical/Health	71%	62%
	Government	76%	77%
	Corporate	75%	67%
	Overall	**76%**	**76%**
Asia Pacific	Academic Top	75%	63%
	Academic Middle	67%	64%
	Academic Lower	62%	67%
	All Academic	*67%*	*65%*
	Medical/Health	68%	66%
	Government	76%	65%
	Corporate	60%	58%
	Overall	**67%**	**64%**
South America	Academic Top	52%	53%
	Academic Middle	48%	48%
	Academic Lower	64%	64%
	All Academic	*55%*	*55%*
	Medical/Health	76%	73%
	Government	74%	74%
	Corporate	80%	80%
	Overall	**64%**	**64%**
Middle East and Africa	Academic Top	66%	84%
	Academic Middle	63%	77%
	Academic Lower	47%	85%
	All Academic	*58%*	*81%*
	Medical/Health	54%	86%
	Government	63%	63%
	Corporate	85%	90%
	Overall	**62%**	**82%**
Emerging Countries	Academic Top	63%	52%
	Academic Middle	57%	55%
	Academic Lower	50%	61%
	All Academic	*57%*	*56%*
	Medical/Health	65%	64%
	Government	71%	57%
	Corporate	71%	62%
	Overall	**62%**	**58%**
Overall	Academic Top	76%	73%
	Academic Middle	69%	68%
	Academic Lower	63%	66%
	All Academic	*69%*	*69%*
	Medical/Health	69%	67%
	Government	71%	67%
	Corporate	64%	61%
	Overall	**69%**	**67%**

MAJOR REFERENCE WORKS

MAJOR REFERENCE WORKS – PREDICTED CHANGE FOR 2016

- Librarians were asked whether the number of Major Reference Works (MRWs) to be purchased in 2016 would be greater, remain the same or be less than in 2015.
- <u>% Change:</u> Overall, the budget for MRWs is predicted to decrease by 2.1%.
    - Region: **North America** predicts the largest drop (-4.8%). **Europe** also expects a decrease, though more modest at -2.6%..
    - **Middle East and Africa** is the only region to predict an increase for MRW spending in 2016 (3.3%).
    - **Asia Pacific and South America** both predict small drops (-0.2% and -0.6% respectively). This reflects an improvement in position for Asia Pacific, who had forecast a larger drop of -1.6% last year, but a downturn for South America who had predicted a 0.8% rise for 2015.
    - **Academic institutes** follow an almost identical pattern to the overall regional changes. North America is again the hardest hit, with a predicted decrease in MRW budget of -4.9%.
- <u>Qualitative Predictions</u>: 70% of institutes believe the budget will remain static. Just 6% expect an increase, while 15% predict a decrease. The remainder were unable to give an estimate.

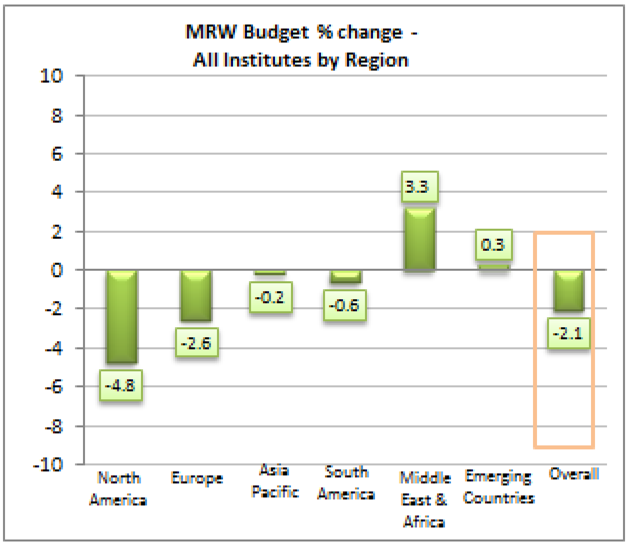


Figure 19

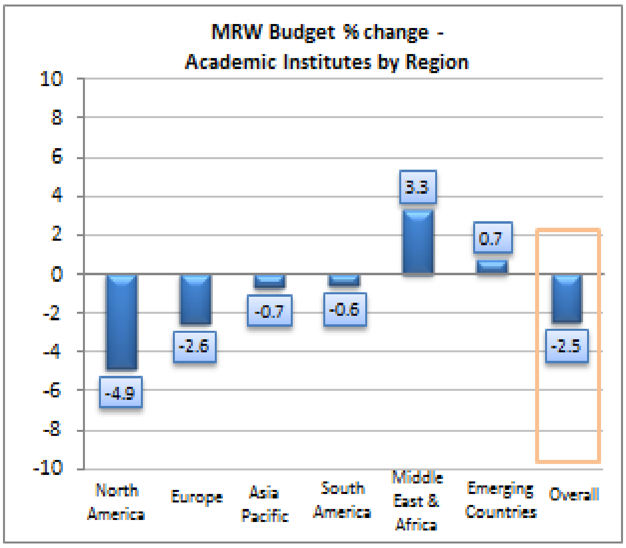


Figure 20

REASONS WHY THE NUMBER OF MRWS IS LIKELY TO CHANGE IN 2016

Librarians were asked why the amount of MRWs purchased had changed from the previous year. The top three reasons for increases and decreases are below:

Increases:

User demand
New publications/ updated editions are coming out
Price increases

Decreases:

Low usage of MRWs
Budget cuts
Information is available for free on the internet

Table 31: MRW Budget change for 2016					
		Qualitative Predictions % respondents predicting			*Quantitative Predictions*
Region	**Organisation**	**Increase**	**Static**	**Decrease**	**% Budget Change**
North America	Academic Top	12%	45%	33%	-6.2
	Academic Middle	7%	71%	17%	-4.2
	Academic Lower	18%	47%	34%	-4.6
	All Academic	*13%*	*55%*	*28%*	*-4.9*
	Medical/Health	26%	58%	16%	-3.5
	Government	0%	100%	0%	0.0
	Corporate	0%	63%	38%	-12.5
	Overall	**13%**	**59%**	**25%**	**-4.8**
Europe	Academic Top	3%	70%	18%	-1.2
	Academic Middle	7%	60%	33%	-2.9
	Academic Lower	7%	67%	13%	-3.7
	All Academic	*5%*	*66%*	*22%*	*-2.6*
	Medical/Health	0%	79%	14%	-0.9
	Government	0%	85%	8%	-4.2
	Corporate	7%	64%	21%	-4.3
	Overall	**4%**	**70%**	**19%**	**-2.6**
Asia Pacific	Academic Top	2%	72%	7%	-0.5
	Academic Middle	5%	74%	12%	-0.7
	Academic Lower	7%	72%	9%	-0.9
	All Academic	*5%*	*73%*	*9%*	*-0.7*
	Medical/Health	11%	70%	3%	1.5
	Government	0%	96%	0%	0.0
	Corporate	0%	87%	6%	-0.4
	Overall	**5%**	**77%**	**7%**	**-0.2**
South America	Academic Top	0%	80%	20%	-0.2
	Academic Middle	0%	83%	17%	-0.5
	Academic Lower	0%	75%	25%	-1.4
	All Academic	*0%*	*80%*	*20%*	*-0.6*
	Medical/Health	0%	100%	0%	0.0
	Government	0%	80%	20%	-0.6
	Corporate	0%	100%	0%	-1.3
	Overall	**0%**	**84%**	**16%**	**-0.6**
Middle East and Africa	Academic Top	0%	50%	0%	1.8
	Academic Middle	0%	100%	0%	6.3
	Academic Lower	0%	100%	0%	1.5
	All Academic	*0%*	*83%*	*0%*	*3.3*
	Medical/Health	50%	50%	0%	7.0
	Government	0%	100%	0%	0.0
	Corporate	0%	50%	50%	0.0
	Overall	**9%**	**73%**	**9%**	**3.3**
Emerging Countries	Academic Top	6%	65%	0%	0.3
	Academic Middle	10%	71%	6%	1.0
	Academic Lower	10%	69%	0%	0.8
	All Academic	*9%*	*68%*	*2%*	*0.7*
	Medical/Health	14%	50%	9%	3.2
	Government	0%	94%	0%	0.0
	Corporate	0%	68%	18%	-3.3
	Overall	**7%**	**69%**	**5%**	**0.3**
Overall	Academic Top	5%	64%	17%	-2.4
	Academic Middle	6%	70%	19%	-2.4
	Academic Lower	10%	63%	19%	-2.8
	All Academic	*7%*	*66%*	*18%*	***-2.5***
	Medical/Health	11%	70%	10%	-0.5
	Government	0%	93%	4%	-1.0
	Corporate	2%	78%	16%	-3.2
	Overall	**6%**	**70%**	**15%**	**-2.1**

MAJOR REFERENCE WORKS FORMATS BEING PURCHASED

- 74% of institutes that take MRWs choose to purchase the print version, as with last year, this is 8% higher than the proportion taking online (66%).
- Asia Pacific continues to lag behind other regions in terms of uptake of online MRWs (47%). North America has the highest percentage of online MRW uptake (84%). Overall, academic institutes have the highest uptake of online (72%).

- Institutes who had cancelled a subscription to an online MRW were asked why they had done so. Of the 102 who had cancelled, 33% cited low usage and 9% said it was because it was not value for money.

Table 32: Purchasing patterns for MRWs by region and organisation (up to current year)					
		% respondents purchasing different MRW formats			
Region	Institution	MRW Print	MRW Combined	MRW Online	All MRW Formats
North America	Academic Top	92%	27%	97%	22%
	Academic Middle	78%	46%	80%	27%
	Academic Lower	78%	46%	86%	38%
	All Academic	*82%*	*40%*	*88%*	*29%*
	Medical/Health	79%	32%	79%	21%
	Government	91%	42%	82%	42%
	Corporate	56%	70%	56%	44%
	Overall	**81%**	**41%**	**84%**	**30%**
Europe	Academic Top	74%	35%	85%	24%
	Academic Middle	77%	28%	84%	19%
	Academic Lower	74%	35%	66%	19%
	All Academic	*75%*	*33%*	*77%*	*21%*
	Medical/Health	72%	17%	66%	14%
	Government	36%	47%	53%	13%
	Corporate	47%	40%	80%	27%
	Overall	**68%**	**32%**	**74%**	**19%**
Asia Pacific	Academic Top	84%	31%	67%	26%
	Academic Middle	74%	25%	61%	20%
	Academic Lower	74%	26%	35%	14%
	All Academic	*78%*	*28%*	*54%*	*20%*
	Medical/Health	57%	11%	30%	5%
	Government	60%	36%	46%	32%
	Corporate	77%	35%	39%	29%
	Overall	**72%**	**27%**	**47%**	**20%**
South America	Academic Top	80%	80%	80%	50%
	Academic Middle	83%	60%	60%	50%
	Academic Lower	75%	75%	75%	75%
	All Academic	*86%*	*71%*	*69%*	*57%*
	Medical/Health	100%	67%	67%	67%
	Government	100%	60%	60%	60%
	Corporate	100%	100%	100%	100%
	Overall	**88%**	**71%**	**72%**	**62%**
Middle East and Africa	Academic Top	67%	0%	100%	0%
	Academic Middle	50%	33%	50%	0%
	Academic Lower	67%	0%	67%	0%
	All Academic	*63%*	*25%*	*63%*	*0%*
	Medical/Health	100%	50%	100%	50%
	Government	100%	0%	0%	0%
	Corporate	100%	0%	100%	0%
	Overall	**75%**	**18%**	**73%**	**8%**
Emerging Countries	Academic Top	81%	41%	75%	31%
	Academic Middle	81%	38%	66%	29%
	Academic Lower	84%	32%	39%	23%
	All Academic	*83%*	*37%*	*70%*	*28%*
	Medical/Health	77%	23%	45%	9%
	Government	84%	63%	72%	58%
	Corporate	68%	55%	64%	41%
	Overall	**81%**	**41%**	**60%**	**31%**
Overall	Academic Top	83%	32%	82%	24%
	Academic Middle	76%	34%	73%	23%
	Academic Lower	75%	36%	60%	25%
	All Academic	*78%*	*35%*	*72%*	*31%*
	Medical/Health	69%	20%	54%	13%
	Government	64%	40%	55%	30%
	Corporate	68%	44%	58%	32%
	Overall	**74%**	**34%**	**66%**	**24%**

PROPORTION OF MRW BUDGET SPENT ON ONLINE

- Respondents were asked what proportion of their current (2015) MRW budget was spent on online, print and combined formats of MRW. Overall, 34% of the budget is used for online. The low number for print shows that while many institutes have maintained print MRWs over time (table 27), these are now becoming less common. New content is more likely to have an electronic component (either online only, or combined).

Table 33: Proportion of current MRW budget spent on different format types

Organisation	% budget for Online MRW	% budget for Combined MRW	% budget for Print MRW
Academic Top	31%	62%	7%
Academic Middle	39%	55%	6%
Academic Lower	31%	56%	13%
All Academic	*34%*	*57%*	*9%*
Medical/Health	39%	54%	7%
Government	36%	45%	19%
Corporate	26%	61%	13%
Overall	**34%**	**56%**	**10%**

PERPETUAL VS YEARLY ACCESS OF MRWS

Those librarians who had purchased online MRWs were asked to specify the proportion of the budget spent on perpetual and yearly models. All but Medical institutes spend a higher proportion of the budget on perpetual models. Perpetual models are most popular with Government institutes (64%).

Table 34: Proportion of online MRW budget spent on perpetual vs yearly models	% of budget spent on perpetual models	% of budget spent on yearly models
Academic Top	51.3	48.7
Academic Middle	57.5	42.5
Academic Lower	51.1	48.9
Medical	37.7	62.3
Government	63.8	36.2
Corporate	53.7	46.4
Total	**52.4**	**47.7**

INSTITUTIONAL REPOSITORIES

- Institutional repositories are reasonably widespread, with just over half (54%) of all institutions either owning, or sharing ownership of a repository. This figure is static compared to last year.
- As expected, the most widespread repository ownership is in the academic sector, with well over two thirds (71%) of institutions providing a repository. This rises to 85% for top academic institutes. The lowest level of repository ownership is in the Medical sector (28%).
- Research Articles continue to be the most preferred content with 83% of institutes indicating they post research articles into their repository. Dissertations and Theses (79%) are the next most frequently mentioned type, though unsurprisingly, these are the most common type in academic institutes (90%). The “other” formats mentioned include reports, magazines and internal documentation.

Table 35: Usage of Institutional Repositories						
Organisation	% access a repository	Type kept in repository				
		Dissertations/ theses	Research articles	Teaching materials	Datasets	Other
Academic Top	85%	95%	86%	54%	35%	18%
Academic Middle	63%	91%	79%	51%	30%	10%
Academic Lower	65%	84%	84%	41%	20%	17%
All Academic	*71%*	*90%*	*83%*	*49%*	*29%*	*15%*
Medical/Health	28%	59%	88%	35%	18%	26%
Government	38%	41%	72%	10%	38%	41%
Corporate	33%	34%	81%	16%	30%	33%
Overall	***54%***	***79%***	***83%***	***42%***	***29%***	***20%***

HOW INFORMATION IN REPOSITORIES IS STORED

- The 372 institutions which reported having a repository were asked some follow up questions about the format of information being stored and how the repositories are maintained.
  97% of institutes keep text materials in the repository. Images remain the second most popular format to be stored (49%). Video usage rises 6% from last year, and overtakes audio materials (38%). Audio has also increased form last year by 4% to 38%.

Table 36: Usage of Institutional Repositories				
Organisation	Format kept in repository			
	Text	Video	Audio	Images
Academic Top	96%	48%	48%	55%
Academic Middle	98%	34%	34%	54%
Academic Lower	97%	34%	29%	39%
All Academic	*97%*	*40%*	*38%*	*50%*
Medical/Health	97%	32%	32%	44%
Government	100%	48%	45%	41%
Corporate	97%	44%	34%	50%
Overall	***97%***	***40%***	***38%***	***49%***

HOW INFORMATION IN REPOSTIORIES IS MAINTAINED

- Currently, most of the information stored within institutional repositories is deposited voluntarily (75%). The proportion of academic institutes requiring mandatory storage of research articles is 20%. This has dropped 6% from last year's survey (26%). The mandatory storage of research articles for non-academics is 36%.
- The majority of institutional repositories are maintained by library staff (89%)
- 57% of repositories are available to all. This decreases 5% compared to last year.

Table 37: Usage of Institutional Repositories		
Type	Mandatory	Voluntary
Academic		
Dissertations/ theses	66%	34%
Research articles	20%	80%
Teaching materials	18%	82%
Datasets	5%	95%
Other	50%	50%
Non-Academic		
Dissertations/ theses	48%	52%
Research articles	36%	64%
Teaching materials	39%	61%
Datasets	16%	84%
Other	25%	75%

Table 38: Who maintains the repository	
Maintenance	Proportion
Library staff at the institute	89%
Staff at the institute, but not based in the library	9%
3rd party agency	2%

Table 39: Availability of repository	
Maintenance	Proportion
It is only available to individuals based in your institute	37%
Available to anyone in the country in which the institute is	6%
Available to all	57%

GROWTH OF INSTITUTIONAL REPOSITORIES

- All institutes were asked how fast they thought their institutional repositories were growing, 44% thought they were growing fast or very fast, but most indicated that they were growing slowly or very slowly (49%).

Table 40: Growth of Institutional Repositories					
Organisation	It is growing very fast	It is growing fast	It is growing slowly	It is growing very slowly	Stable/no change
Academic Top	8%	41%	39%	6%	6%
Academic Middle	5%	34%	54%	6%	1%
Academic Lower	5%	35%	40%	16%	2%
All Academic	*6%*	*37%*	*44%*	*9%*	*3%*
Medical/Health	0%	44%	47%	0%	9%
Government	11%	36%	25%	4%	25%
Corporate	6%	36%	36%	3%	18%
Overall	***6%***	***38%***	***42%***	***7%***	***7%***

Respondents were also asked to rate the growth of video materials kept in the repository. 39% of those who store video materials in the repository believe the growth is growing fast. 40% stated it is growing slowly.

Table 41: Growth of video material in repositories					
Organisation	It is growing very fast	It is growing fast	It is growing slowly	It is growing very slowly	Stable/ no change
Academic Top	4%	31%	42%	12%	12%
Academic Middle	0%	43%	46%	0%	11%
Academic Lower	0%	39%	36%	14%	11%
All Academic	*2%*	*36%*	*42%*	*9%*	*11%*
Medical/Health	0%	64%	36%	0%	0%
Government	6%	38%	38%	6%	13%
Corporate	13%	47%	33%	7%	0%
Overall	***3%***	***39%***	***40%***	***8%***	***9%***

PLANS FOR A DATA REPOSITORY

Librarians were asked if there were any plans for a data repository in the institute. Overall, just under a quarter (23%) already had a data repository, with 26% confirming that there are plans to add one. 42% of respondents said there were no current intentions to add a data repository. Current uptake is highest among the non-academic sectors.

Table 42: Plans to set up a data repository				
	Yes	No	Already a data repository	Don't know
Academic Top	32%	39%	18%	11%
Academic Middle	30%	46%	17%	6%
Academic Lower	24%	49%	21%	6%
Medical	9%	41%	29%	21%
Government	18%	39%	36%	7%
Corporate	27%	30%	36%	6%
Total	26%	42%	23%	9%

