

Acquisitions and the accelerated shift to digital in academic libraries in the UK: reflecting on the Covid experience at De Montfort University and Imperial College London

Abstract

Summer 2020 witnessed a large-scale temporary release of content from the publishing community to support UK universities as they moved to online-only delivery, followed by a scramble by those institutions to maintain access to resources. This paper reflects on the experiences of De Montfort University and Imperial College libraries during this period as they supported the move to remote teaching. It focuses on the complexities experienced during this transitional period, and considers how the speed of these changes increased staff workloads, stretched budgets, and compelled acquisitions teams to act without always fully gathering evidence or strategically planning how new practices might work in the longer term. The authors, who sit on various national contract management and acquisitions strategy groups, examine the repercussions of navigating from an unplanned, accelerated digital shift to a more managed, sustainable paradigm, and contemplate how the advent of multimode teaching may impact on the way libraries are resourced.

Introduction

When the severity of the Covid virus became clear in early 2020, campuses around the UK started to lock down, and Universities were forced to move their teaching online. Staff, including those in libraries, were required to work remotely at short notice.

At the same time, the need for institutions to provide mass online access to learning materials emerged with equal urgency. Where ebooks had been useful alternatives to print titles – improving accessibility, allowing off-campus access – they now became a necessity. With 100% of library users studying remotely, it also became clear that there would be a need for e-resources which had unrestricted access: models

with constraints such as single-user licences would be of much less use in this changed environment where users could no longer rely on access to print stocks.

Library closures rendered more than 220,000 print items inaccessible at Imperial College, and 360,000 at De Montfort University (DMU). Given such numbers, library staff in both institutions chose to prioritise the urgent replication of their 'core' print collections in the online environment. Physical titles which had been heavily used by students and researchers would need to be provided remotely to multiple users concurrently; and this often meant having to choose expensive etexbook options when regular ebook licences were unavailable. Demand Driven Acquisition (DDA) models also proved to be a useful tool in helping libraries replicate parts of their print collections in electronic format.

Adding all this additional content, however, would put budgets under pressure, and would impact on how the libraries prepared for the 2020/21 academic year. With no additional emergency funding from government sources to support Universities, it was down to library budgets to absorb this increased spend. However, much of this was done quickly and with little notice, meaning decisions would have to be made outside of standard long-term acquisitions strategies, at least until greater clarity emerged within the sector.

What happened and when?

During late Spring and early Summer 2020, multiple publishers and aggregators voluntarily made content available to the Higher Education (HE) sector in recognition of the major shift to online-only delivery. This was helpful to institutions who otherwise had no realistic way of making a broad and almost instantaneous transition to electronic delivery. As a result, students and researchers were able to continue to use resources, despite their institutions' physical libraries being closed for the duration of this initial

lockdown. However, while this was invaluable to users, especially those conducting research, writing up dissertations, or finishing their final year, it soon became clear that the management and administration of so much content on so many platforms was complex and at times unwieldy. In addition, the spectre of access coming to a grinding halt was never far from acquisition librarians' minds: how would we retain access to the material we needed? How would we prioritise need? How would we make those kinds of decisions? What data – and what capacity to analyse it – would be required? What budgetary resources would be required?

It would be wrong to suggest that institutions were not grateful for what were effectively donations of resources from around the sector, as these would have undoubtedly proved crucial to users: this, of course, is our job; and having continued access to material certainly bought institutions time to go about preparing for the new academic year where teaching and learning looked almost certain to be conducted remotely. But for those who work in library back offices, it merely postponed the deadline for what promised to be an immense piece of work.

Imperial: in the light of a clear move to blended learning by the College, the Library set about looking at some of the data which came out of the unrestricted access supplied over the Summer. If there was to be, by necessity, an acceleration in the shift to online coverage of material, acquisitions staff would need to know where to direct their own resources. The response was to evaluate the lists of e-textbooks which had been provided for free to see where continued subscriptions might be worthwhile pursuing; to analyse publisher sites to see what level of ebook usage had been recorded; and, crucially, to compare reports of previous years' print usage against lists of electronically available material.

With academic staff having little time to redesign courses or update reading lists to more closely align with their new models of teaching, the acquisitions team had to make a number of qualified strategic and operational decisions to make sure that, by the beginning of the 20/21 academic year, there would be as much core and supplementary reading available to users as possible, wherever they were located.

DMU: the Library also embraced the release of free content by publishers, as well as aggregators opening up publisher content. For example, ebooks from EBSCO were upgraded to allow unlimited access at no extra cost. At the time these resources were welcomed by the HE community, but in hindsight the additional work added to library teams was not always justified by a corresponding increase in usage:

DMU integrated 32 new sets of online resources which took a large amount of work but saw limited uptake. However, at this stage any data indicating material for potential purchase was valuable. Indeed, one example was the unexpectedly high usage of the temporarily free Britannica Academic, which was subsequently purchased.

Etextbook suppliers worked closely with Jisc over a very condensed period in Summer 2020 to provide large numbers of texts to institutions in flexible packages, but it is unclear as to the value this brought to the sector. Both Imperial and DMU felt the overarching cost of this type of access was prohibitive, and therefore concentrated on other ways of obtaining titles, despite the limited timeframe and constricted budget. Other libraries chose to approach their institutions for urgent additional financial support: the pro-vice provost for Libraries at UCL, for example, has gone on record claiming an extra £3 million was required to ensure access to ebooks for the 2020/21 academic year.

Moving from print to electronic

Institutions took different approaches to their print collections, with many choosing to

completely pause the purchase of physical items, while others continued, albeit often at a drastically reduced rate.

Imperial: As the Summer went on, the decision was made by the College to reopen library spaces with reduced capacity. This meant the Library print stock was partially accessible, although it was anticipated that the majority of users would continue to learn remotely. Therefore a hybrid purchasing policy would be required for the 20/21 financial year, and would need budgeting for.

Increasing online acquisitions is certainly possible, but almost every library's budget is a zero sum: an expansion in ebook purchasing must by definition require a contraction in spend elsewhere. Unsurprisingly, across the sector we have seen the amount of print ordering shrink, and in some cases completely halt. Imperial continued to order print titles, but not at the rate of previous years. Instead, the number of etextbooks was doubled, a DDA programme was launched to cover all supplementary reading, some new ebook collections and Evidence Based Acquisition (EBA) pilots were introduced, and a new process was developed which tagged items in Leganto held only in print. This last feature was designed to help librarians consult with academics about where there were likely to be pressures on their reading lists, and to either recommend alternatives or elicit a potential etextbook purchase.

DMU: DMU chose to halt most print spending except where absolutely no alternative was available. This ensured that funds would be made available for the expansion of online purchasing. Reading Lists are the default method of ensuring students can access the resources recommended by academics, most often via the VLE and its integration with TalisAspire. Titles from these Reading Lists were matched with ebook suppliers, with the Library then

choosing the best purchasing option. Over time, though, this became increasingly difficult to navigate, with some items being removed from platforms and credits being altered. Worse still was the frustrating situation where credit models could not be renewed mid-year, such as the example of a Midwifery text which initially had 200 credits available, but no option to purchase additional credits. So once all the credits were used up no access was possible until the following year. Such unpredictability and unreliability made any form of planning extremely difficult.

DMU also saw an increase in the submission of Reading Lists, with academics who had not previously supplied them suddenly wanting to use them as part of their online teaching offer for students. This again put pressure on the Library team as demand outstripped coverage provided by free resources. It also generated further demands on a budget which had not seen any uplift.

To address this problem DMU used DDA to make titles available but only purchasing those which saw use. Similarly a User Activated Acquisition (UAA) model was set up with e-textbook supplier BibliU, to access some of the textbooks which had been identified as 'electronic format essential'. This brought about a shift in the collection: fewer outright purchases and more leasing of content.

This approach did throw up some issues: some publishers withdrew from the programme, which led to academics asking why materials weren't available; and some of the prices were prohibitive, leading to conversations with academics about the cost implications of the material they had requested. In this, at least, they often understood the impossibility of the situation, and the Library was sometimes able to walk away from publishers and seek alternatives.

Supporting the move to remote learning

Imperial: Imperial initiated a number of practical solutions to help support students who were suddenly working remotely. Where ebooks could not be sourced, a scan-and-send service was established which allowed users to access digital extracts from items in stock, scanned in by staff who had returned to campus at the start of the academic year. A smaller-scale service was also brought in whereby supplier Browns would post print books directly to users' home addresses. Once the library reopened, as was the case with many institutions, a click-and-collect service was established to allow users to access print stock without having to browse the stacks and potentially compromise social distancing guidelines. However, these interventions were small-scale and temporary, and only ever supplemented what would have to be an almost wholesale shift to digital resource availability.

So a closer, more thorough look at online provision was required: was the right material available? Was there enough material? Was it available with the kind of access models our users needed? What would be the budgetary implications of expanding our online provision?

Although it was a time-consuming exercise, the Imperial team mapped print usage, free etextbook usage, and Leganto data together to produce a matrix of 'predicted' high usage titles. These were streamed into two pools: a DDA pool and an etextbook pool.

In the first quarter of 2020/21 Imperial saw 375 transactions (autopurchases and short term loans) from a DDA pool of just over 800 titles, representing an average monthly spend of around £3,100. 25 additional etextbooks were sourced to be used as core and supplementary reading for Autumn term courses and saw almost universal high usage.

However, as with many institutions there were delays when dealing with suppliers who were taking on huge amounts of new business. Furthermore, titles which had been quoted for as part of a DDA or as etextbooks sometimes turned out to be unavailable after all. Such ‘teething problems’ will need to be addressed in the future.

As we have seen, consortia bodies stepped in to try and help institutions make sense of the scramble for etextbooks, as well as for items via the traditional aggregated ebook route, but in a sellers’ market we have started to see some unexplained pricing changes, some tightening of digital rights, and, some might say, instances of outright price-gouging. In addition to this, many institutions are now tied into one-copy-per-patron etextbook subscriptions which will need to be replenished every year if they are to deliver the content required by their academic departments.

So, it is becoming increasingly clear that much of the goodwill gained by the publishing industry during the initial pandemic response has started to ebb away, now that single user licences are being increased in price, titles are becoming harder to track down, and definitions of “premium” content (and thus how they are to be procured) are being recalibrated. Institutions understand that low or non-existent print sales for publishers will need to be offset by greater electronic sales: the question is whether the 2021 ebook and etextbook models currently pass the value for money test, and the answer to that question will be a key driver in whether we see a continuing expansion or a deceleration in online resource purchasing.

DMU: At DMU, it was similarly helpful to review print holdings, and then purchase what was correspondingly available in electronic format to support academics as they moved their teaching online. By and large this worked but during this process it became apparent that sourcing texts was becoming more difficult, prices were becoming

less affordable, and less practical licence model types were being introduced. Examples of prices encountered included:

- Criminology : Explaining Crime and Its Context : Explaining Crime and Its Context by Brown, Esbensen and Geis which had a single-user ebook price of £920 versus a print cost of £74.99
- Contemporary Business Issues by Hill which had a single-user ebook price of £700 versus a print cost of £39.99
- Quantitative Methods : For Business, Management and Finance : For Business, Management and Finance by Swift and Piff which had a single-user ebook price of £463.92 versus a print cost of £57.99.

In cases such as these, and where e-textbook models were not justified by likely use or cost, the decision was made not to purchase, leaving only an inaccessible print copy. Libraries have often accepted that books are more expensive in some content areas, such as Business, but a review across DMU's content suggested that costs rose over a short period in all subject areas.

To try and circumnavigate some of the difficulties of outright purchasing, DMU decided to take a pragmatic approach. Staff compiled a list of high-use print-only titles which had seen 15 or more issues over the previous 5 years, and then liaised with the main supplier to put them into a DDA. Any titles which had a publication date of more than 6 years ago were omitted, except in particular subject areas such as arts, design and humanities where the cut-off date was modified to up to 12 years. Between April 2020 and February 2021, 466 titles had been purchased at a cost of £29,591.19. Normally we would only purchase on demand which only amount to limited purchases but we needed to be proactive to have titles available in electronic format at reasonable costs.

Availability

Given the rush to teach online, both DMU and Imperial faced situations where core items on Reading Lists did not have an electronic version available. This was amplified at DMU by its large proportion of courses providing for the creative industries, which traditionally have fewer ebooks available. Understandably, despite the guidelines put out by the Library, academics were still adding these print only titles to their lists. This only added to the workload of Library staff who were duty-bound to engage in further conversations to address this.

Certainly the lack of academic titles available electronically is nothing new. A Copyright Negotiating and Advisory Committee (CNAC) report which tested alternative availability of 904 books scanned under the Copyright Licensing Agency (CLA) licence stated:

‘94 (10%) were identified as ISBNs with an electronic alternative. This chimes with other estimates that only around 10% of current academic titles are available as ebooks.’ (Secker et al., 2019)

In some subject areas only print books are available as an effective learning resource, and in other cases it is the only cost-effective method. This affects some subject areas more than others, especially those with citations for “older” texts.

Supply, demand and publisher behaviour

It is our view that the HE sector should have a symbiotic relationship with its commercial suppliers. Institutions provide content and expertise, reviewers and authors, and a ready market for educational texts, which they buy back packaged for use in teaching and learning. The titles they buy support the next generation of our citizens, and it is part of the mission of HE institutions to make sure information is as widely and as easily disseminated as possible. Via a supportive publishing sector, learning

resources should be made open where achievable, and affordable at all other times.

Instead, since the shift to online resourcing has accelerated, exacerbated by Covid, the gap between the Library sector's acquisition requirements and the response of the academic publishing industry has at times widened almost to the point of breaking.

One example is the issue of what are opaquely known as 'textbooks'. It is sometimes difficult to work out where an ebook ends and an etextbook begins, and titles do seem to be able to move from one to the other without their content changing. There have been instances of titles being removed from platforms due to "differences of opinion" between suppliers and publishers, which libraries have no control over, yet it is their end users who are disadvantaged.

Both Imperial and DMU have seen a significant number of titles removed from aggregators' catalogues, as it seems publishers want them delivered in an alternative way, little of which is transparent. This has, in our experience, invariably involved an increase in cost, or a reduction in access; on occasion the change is so great that the title has had to be rejected. In addition, the impact of separate conversations taking place between academics and publishers – which should be triangulated to include librarians – has inevitably led to frustration, misunderstandings, and dissatisfaction. Unfortunately it is often libraries who are being seen as the ones who are not able to make things happen.

This fracturing of relationships is concerning. We hope we are not heading towards a situation where publishers see libraries as prey rather than partners, and libraries see publishers as predatory rather than cooperative. However, in the last year we have already seen a significant reaction from the academic library sector in the form of the *Campaign to investigate the academic ebook market (2020)* which has gained

considerable traction in the UK. An open letter to the Government asking for the academic ebook market to be investigated has been signed by more than 4479 individuals, institutions, purchasing consortia and many others from across the HE community. Further support for the campaign has come from the Chartered Institute of Library and Information Professionals (CILIP) (Hohojanna, 2020), who at the time of writing were formally petitioning the Competition and Markets Authority (CMA) to investigate the practices of academic ebook publishers. Meanwhile, as evidenced by the groundswell of support for these various campaigns, it would appear libraries and their students remain at odds with the publishing industry.

Impact on collection development

While acquisitions teams and librarians have been putting in hours trying to ensure reading list items have been made available, normal library activities such as Collection Development have in many cases been forced to take a back seat. Otherwise laudable aims such as decolonising curricula and developing more holistic collections around student life and wellbeing have fallen off the priority list.

Imperial: Imperial continued to order -primarily- print titles for some areas where efforts are continuing to develop library collections such as Humanities and Medicine, but the primary focus has had to be finding and buying recommended reading for Leganto lists.

DMU: DMU, on the other hand, used DDA to try and continue the University's work on United Nations sustainable development goals and decolonisation, and to demonstrate that the Library would still support academics who were actively reviewing and changing their reading lists. A DDA was set up with 4623 titles with a maximum value of £565,000 to support the decolonisation of the curriculum. To date 213 titles worth £19,500 have been purchased, and the usage has been satisfactory.

However, both DMU and Imperial share the concerns of the wider library community: if our budgets are to continue being invested in models such as etextbooks and limited user ebook licences, is it axiomatic that the amount of collection development work our librarians can do will be (perhaps permanently) diminished? And what will this mean for the *quality* of our collections, as well as the breadth of them? Will there be money left to enrich our stock, and make it more relevant to teaching in the 2020s?

Impact on spend and usage

This has been a year like no other. Figure 1 shows how Southern Universities Purchasing Consortium (SUPC) framework spend on etextbooks doubled from £7.8m in 2019/20 to £14.8m in 2020/21, with their aggregators' market share increasing from 16% of framework spend in 19/20 to 40% in 20/21. In that time the average cost of electronic books outpaced inflation by 23%. The gradual print to digital shift that we've seen over the last decade also suddenly accelerated, with digital representing 84% of framework spend compared to 60% in 19/20.

Data supplied by Proquest (Figure 2) gives a clear picture of the accelerated rate at which ebook titles were purchased in 2020 compared to 2019. Although we see a rise in the purchase of both subscription and perpetual licences, there is a clear preference for perpetual licences. This is perhaps explained by the uncertainty institutions may be experiencing in terms of their year-on-year financial commitment.

EBSCO have supplied usage data (Figure 3) which shows a clear difference from 2019 to 2020. Indicating a rise in ebook usage of about 40% between the two years, it also shows that increases have occurred in section interactions, downloads and in unique titles used.

Figure 4, also provided by EBSCO, shows a continued shift to digital from as far back as 2016 which was occurring regardless of Covid. We can see that over the period the print and ebook percentages have swapped with each other.

It is against these kinds of figures that we have tried to examine how Universities responded to what has quite clearly been an ongoing but accelerating shift to digital resourcing, and how the publishing industry reacted. Whether Libraries are equipped financially to deal with these changes remains to be seen.

Budgetary impact

The acceleration towards a more significant online offering has had a knock-on effect on Library budgets. Supplementing and duplicating print titles with ebooks is an expensive business, and although print budgets have been plundered to help with this shift, spend is rarely like-for-like. Online communities have been sharing the most egregious price hikes with a mixture of disbelief and resentment. The *Campaign to investigate the academic ebook market* (2020) has crowd-sourced examples illustrating eye-watering price differentials which are increasingly becoming the norm.

DMU: At the beginning of the 2020/21 academic year, DMU made use of previously deposited funds to fund the large DDA and UAA pools which have supported the transition to multimode learning for students in the early years of their degrees.

Imperial: Imperial was also able to absorb some of the costs of its expanded etextbook provision in 2020/21 through careful budget management and a suspension of print spending. This freed up enough of a deposit to double the etextbook offer. However, it is not yet clear how this will be sustained year on year without additional financial commitment from the College itself, or a commitment from publishers to either reduce their prices or make their etextbook models more cost effective. Without

those commitments, institutional libraries across the sector will once again face the familiar scenario of being asked to do more with less.

And of course, something has to give. Either library budgets must grow to accommodate the extra resourcing required, or publishers must reduce their prices to allow us to buy more material with similar (or less) money. Perhaps the other choice is one within our own control, whereby libraries must make choices about what their actual function is: developing broad collections which help support multiple learners as they move through their learning journeys, or focussing on providing one or two “premium” titles for every student in an entire cohort. If they choose the latter this would have a significant impact itself on the breadth and depth of publishing over time.

In addition to the budgetary impact, we must not forget the other effects this accelerated move to electronic resourcing has had on libraries. Libraries have found they have had to devote extra capacity to analysing, identifying, negotiating (with suppliers and academics), purchasing and activating new online resources, and in some cases entire new acquisitions processes and workflows have been required. All of this takes time and costs money, too.

Institutional practice going forward

While different institutions approached the scramble for online resourcing in different ways (for example, not all institutions chose to adopt etextbooks as a solution), it is self-evident that hundreds of institutions all trying to do similar things must have wasted untold hours of work, and certainly put huge pressures on third party suppliers and their overwhelmed account reps, while failing to make use of the leverage we have as a sector.

It is our view that, looking into the immediate future, institutional or consortial collaboration will be key when it comes to selecting online models which work for us

and our users, as well as in driving down the costs to make this possible. This will require high level support from senior managers across the sector. A new student experience with new requirements is here, and over the coming years we need to make sure that we as a sector steer the market based on those requirements, and ensure it is suitable for library budgets.

In the meantime, while the threat of Covid remains, institutions need to ensure their users are able to access current, relevant and high quality academic resources from their own homes. The internet allows us to do this in a way that print books never could, and libraries have been tasked, above all else, with making sure this happens. But at the same time, they are dealing with relationships, processes, purchasing models and pricing structures from a pre-pandemic time. The response of publishers has been, on the face of it, to make less content available via traditional library ebook procurement, and instead place a premium on core texts. The response of libraries, based on the needs of their academics and users, has largely been to accept this state of affairs in the absence of a workable alternative.

The acceleration in 2020 was so rapid that libraries have perhaps not had enough time to reflect on what the long-term sustainability of this new praxis is. A frank dialogue between institutions, consortia bodies, third party suppliers and publishers needs to take place to ensure that the market accurately reflects the needs and requirements of libraries and our students. A model which works for everybody in the supply chain is the ultimate aim, where the right product is supplied at a fair price. But as the shift to online resources continues to accelerate, the nature of that product continues to change, and so the conversation is more urgently needed.

Conclusion

We should start where we should always start: what about our users? How has this fast-tracked shift to online affected students? DMU and Imperial data for BibliU etextbook uptake (Figures 5) paints a relatively positive picture of engagement corresponding with resource availability. Etextbook usage has also doubled at Imperial (Figure 6) in line with the doubling of the number of titles on offer. DMU's Open Athens data (Figure 7) for the last 2 and a half academic sessions shows the impact the move to digital has had over that time. At first glance, there is evidence accelerated use matched the increase of availability from 2019/20 to 2020/21, but it is also worth pointing out that there have been twelve months of exceptional disruption where students and staff have had to almost entirely change their normal learning and teaching habits, including institutions adopting "no deficit" policies so students could take a less pressurised approach to studies and not be penalised. This might reflect the decrease in use post lockdown one, but at this point the data remains open to interpretation.

Libraries are now at the point where they must choose what to do with their online spend, but it is probably still too early to tell whether a change in user practice which could influence this decision has emerged, partly because we are still dealing with the pandemic, and partly because students who began their degrees during this period may yet establish new study habits. Libraries may want to take such observations into consideration when managing any future shift in acquisition policy.

Our data suggests usage is holding up, and that it was worth investing time and money in moving over to digital, however painful the gestation was. But much of our – and the sector's – additional purchases have, by necessity, been of the 'just in case' variety. We have not yet had time to measure their true effectiveness. Institutions may feel, for now, that their students and researchers are being supported as much as funds allow. But the full impact of the accelerated shift will, instead, be evidenced over the

next couple of years, and its potential continuation will hinge on the long-term sustainability of online resources such as e-textbooks, their effectiveness in teaching and learning, and their fundamental viability. The conclusions that librarians come to will be determined not by how they managed the *accelerated* shift during the pandemic, but by how they are able to manage an *ongoing* shift to electronic resourcing, and how this shapes the future relationship between the sector and the publishing industry.

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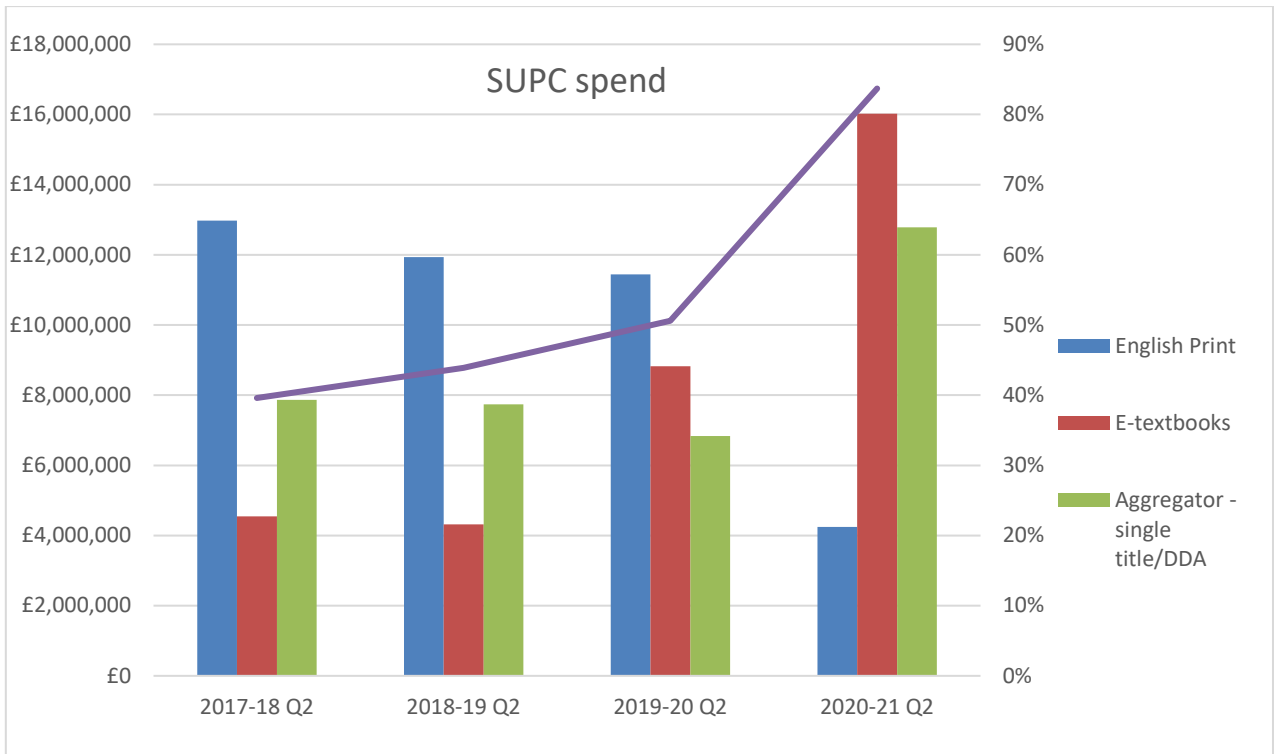


Figure 1 - SUPC framework spend, Q1&2 2017-18 to 2020-21

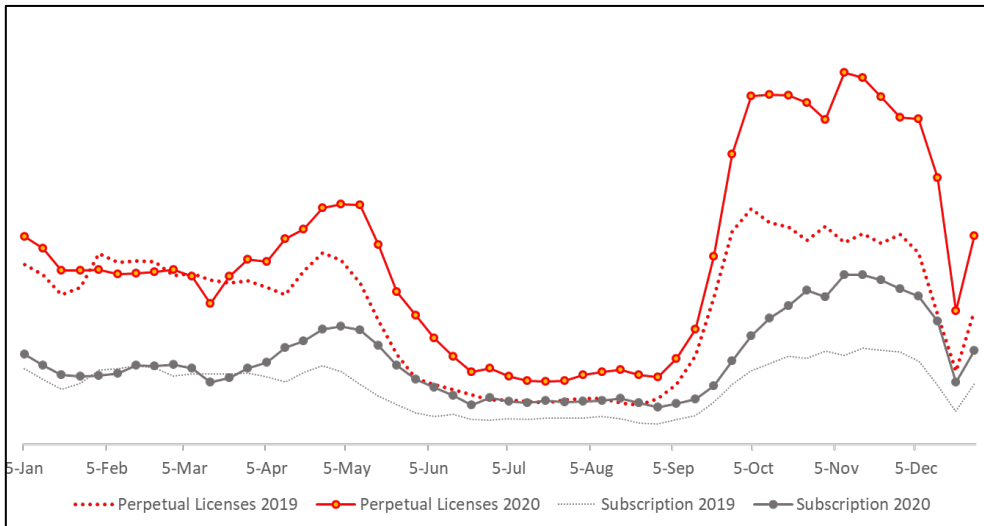
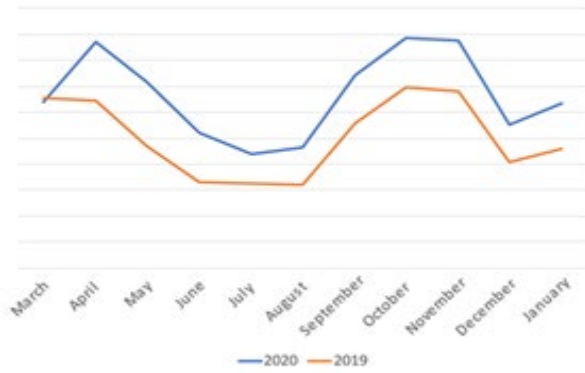


Figure 2 - UKI Ebook Usage Trends, 2019 & 2020 (courtesy of Proquest)

Increase in E-book Usage



- Average of 40% increase in monthly e-book usage
- 34% increase in section interactions
- 26% increase in full e-book downloads
- Users spending a minute more in an e-book on average
- 44% more unique titles used

Figure 3 - UKI Ebook Usage Trends, 2019-2020 (courtesy of EBSCO)

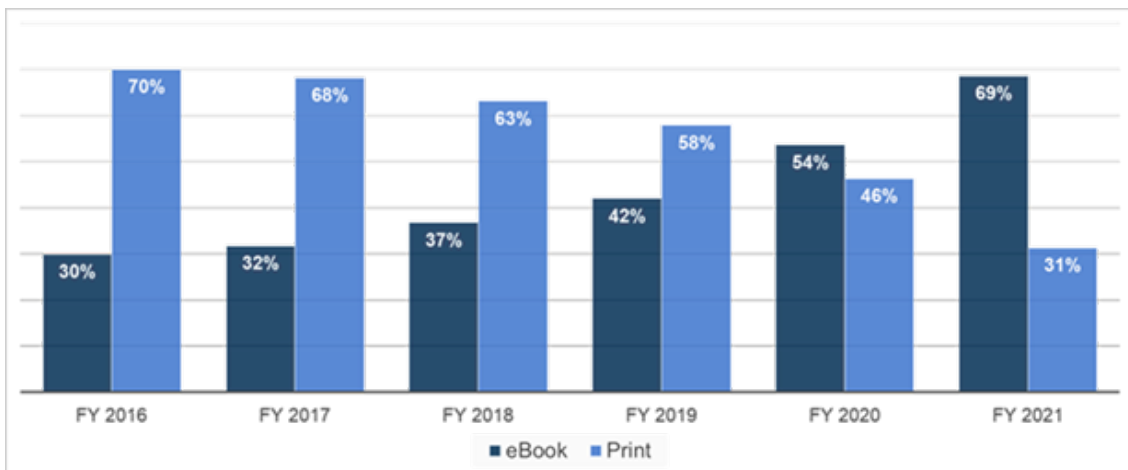


Figure 4 - UKI Ebook Trends, 2016-2021 (courtesy of EBSCO)

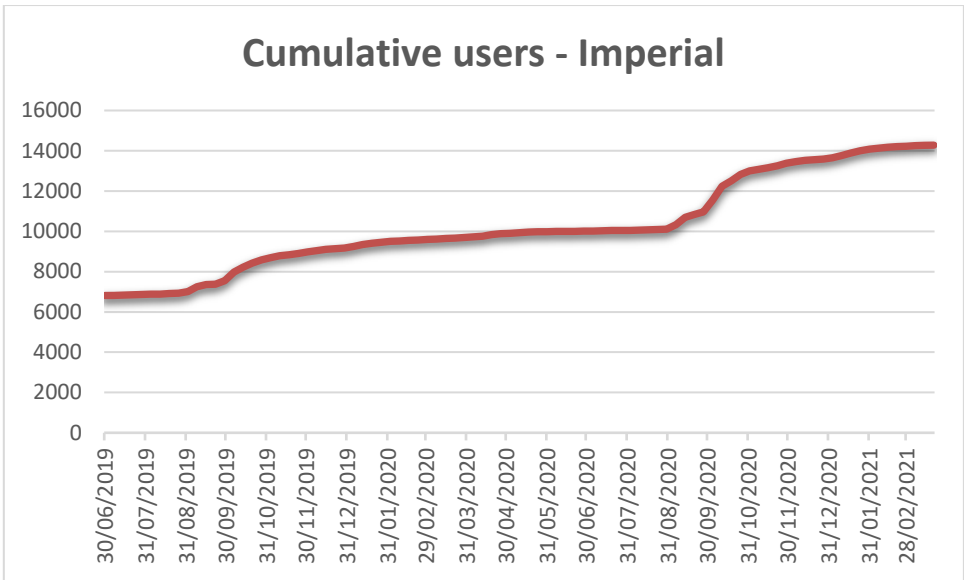
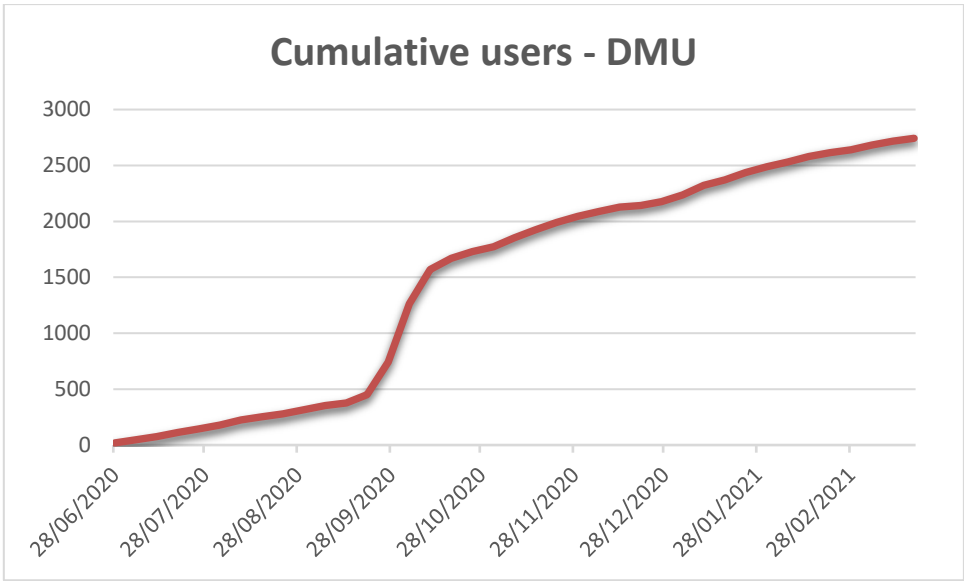


Figure 5 – Cumulative usage of BibliU etextbooks, 2019-2021

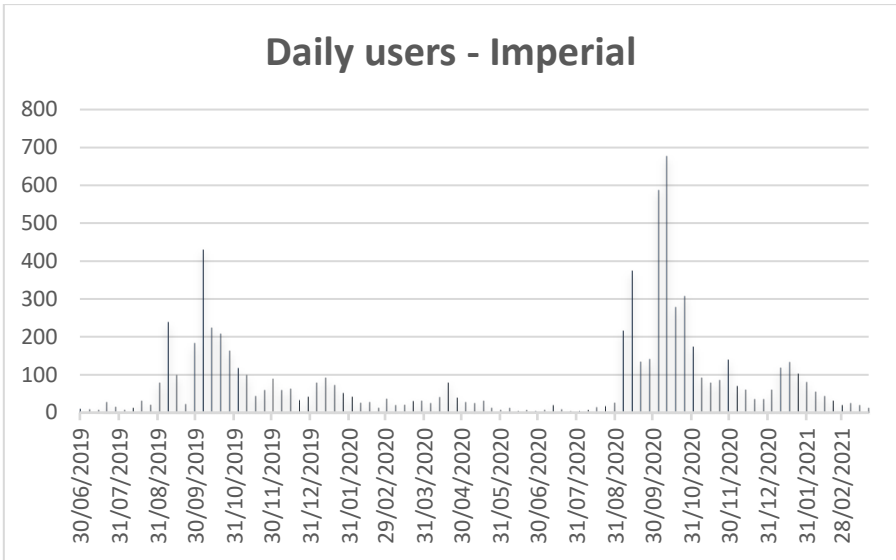


Figure 6 – Daily usage of BibliU ebooks at Imperial, 2019-2021

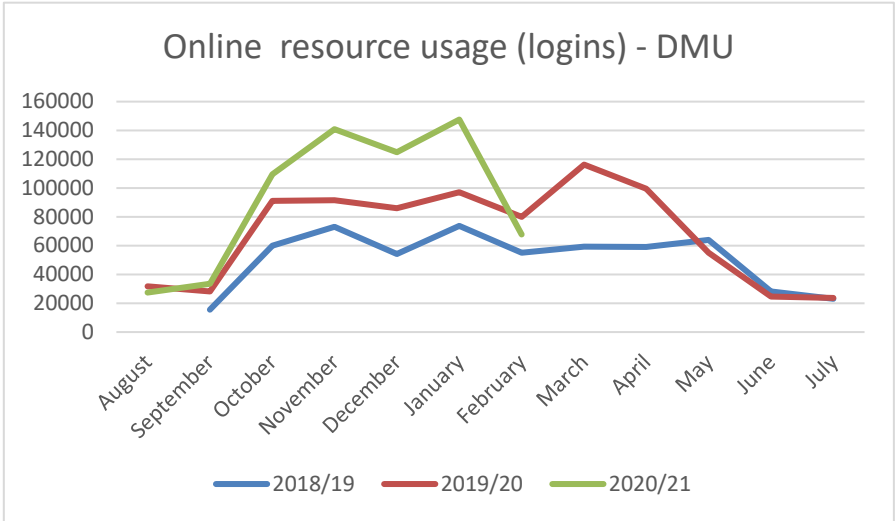


Figure 7 - Online resource usage (logins) at DMU, 2018/19- 2020/21