OCLC GLOBAL COUNCIL

Global Perspectives on Discovery and Fulfillment

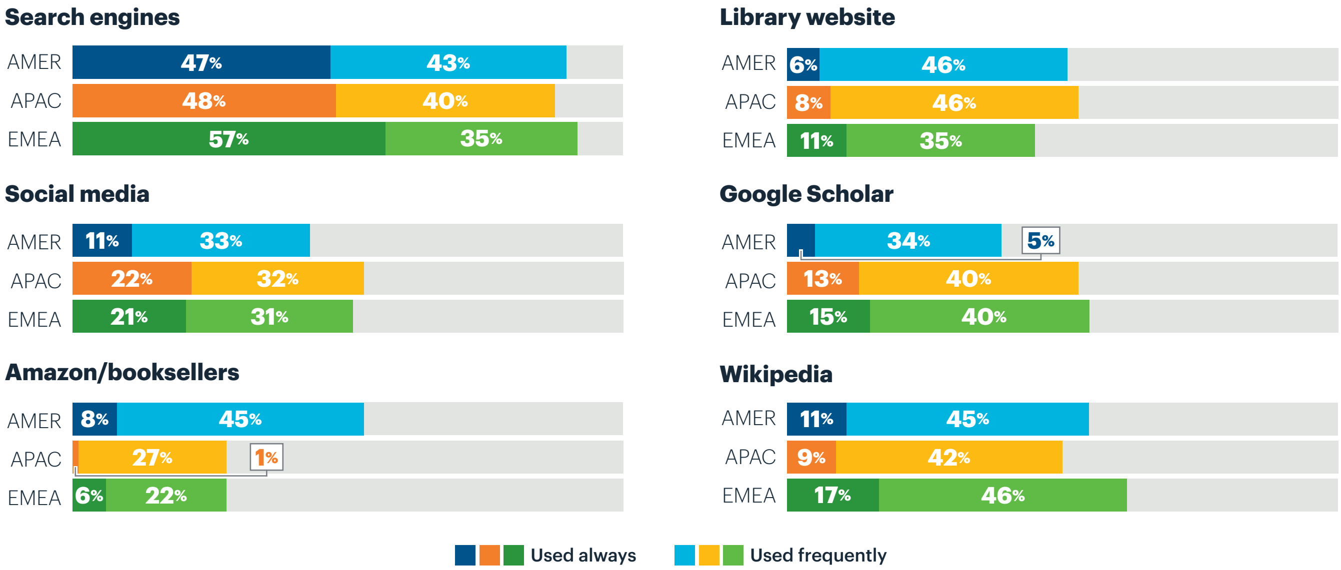
Findings from the 2020 OCLC Global Council Survey

In late 2019 OCLC Global Council, in conjunction with OCLC Research and Market Research teams, surveyed librarians around the world on their discovery and fulfillment efforts. The key takeaways from more than 1,300 respondents in 68 countries: Librarians believe users employ search engines most frequently to discover resources. Budget constraints were reported as the biggest challenge. And respondents believe "the next big things" that will impact libraries include open access, artificial intelligence, and smart technologies.

Global regions: **AMER** = Americas **APAC** = Asia Pacific **EMEA** = Europe, Middle East, and Africa

Globally, about 90% of respondents believe users always or frequently employ search engines to discover resources.

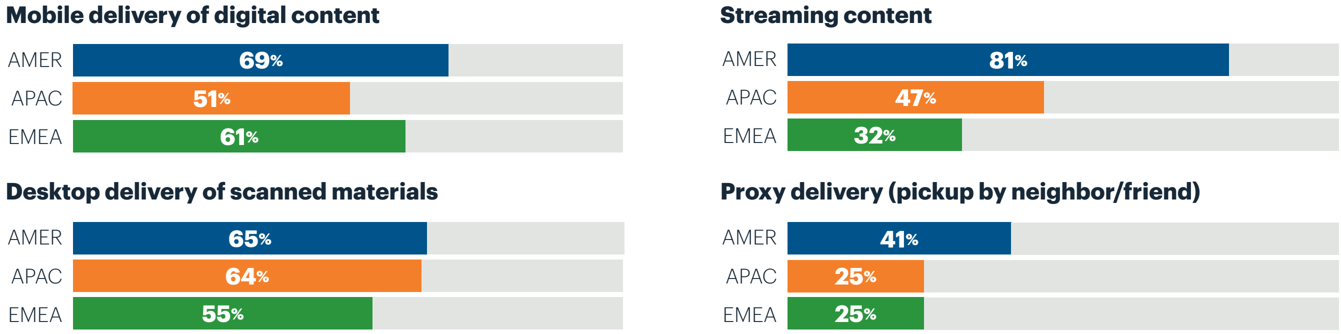
Across all regions, respondents report similar levels of high use for **search engines**, and lower levels of use for the **library website** and **catalog**. There are some interesting regional differences, though. Respondents in the EMEA and APAC regions are more likely to report their users employ **social media** and **Google Scholar** always or frequently, while respondents in the Americas are more likely to report their users employ **Amazon/ booksellers** always or frequently. Also notable: EMEA is higher than AMER and APAC for **Wikipedia**.



Remaining tools with combined always/frequent use percentages are: **Library discovery tool** (AMER 47%, APAC 45%, EMEA 48%); **Personal recommendations** (AMER 63%, APAC 66%, EMEA 67%); **Library catalog** (AMER 55%, APAC and EMEA 62%); **Specialized databases** (AMER 39%, APAC 51%, EMEA 45%); **Librarian recommendations** (AMER 36%, APAC 37%, EMEA 44%); **WorldCat** (AMER 21%, APAC 10%, EMEA 15%).

There are differences between regions in the content delivery options currently offered to users by *academic* libraries.

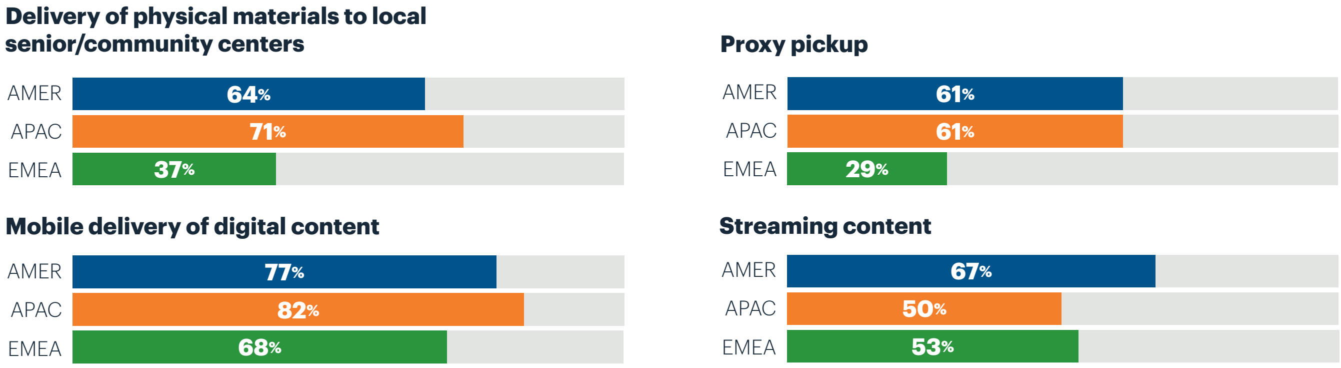
The most pronounced differences include **mobile delivery of digital content** (AMER 69% > EMEA 61% > APAC 51%); **streaming content** (AMER 81% > APAC 47% > EMEA 32%); and **proxy delivery to a neighbor or friend** (AMER 41% > APAC and EMEA 25%).



Remaining currently offered delivery options are: **delivery of physical materials to campus offices** (AMER and APAC 30%, EMEA 29%); **24-hour access to library building** (AMER 25%, APAC 23%, EMEA 33%); **staffed library satellite locations on campus** (AMER and APAC 18%, EMEA 25%); **24-hour access to library lobby for pickup/return** (AMER 14%, APAC 11%, EMEA 29%); **unstaffed library kiosks on campus** (AMER 5%, APAC 14%, EMEA 16%); **delivery of physical materials to dormitories** (AMER 1%, APAC 5%, EMEA 3%); and **drive-thru/curbside pickup** (AMER 0%, APAC and EMEA 1%).

There are differences between regions in the content delivery options currently offered to users by *public* libraries.

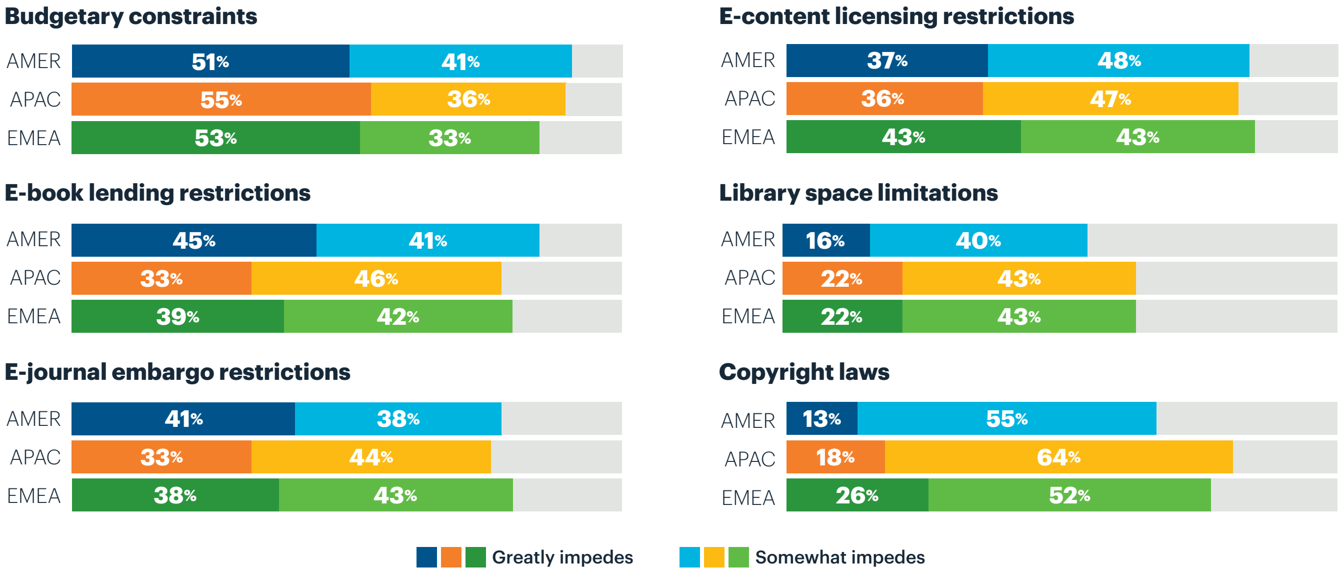
The most pronounced differences include **delivery of physical materials to local senior citizen centers, community recreation centers, etc.** (AMER 71% and APAC 64% > EMEA 37%); and **proxy pickup** (AMER and APAC 61% > EMEA 29%).



Remaining currently offered delivery options are: **delivery of physical materials to homes/offices** (AMER 28%, APAC 46%, EMEA 26%); **staffed library satellite locations in non-library buildings** (AMER 16%, APAC 18%, EMEA 9%); **unstaffed library kiosks in non-library buildings** (AMER 17%, APAC 7%, EMEA 6%); **drive-thru/curbside pickup** (AMER 16%, APAC 4%, EMEA 6%); **24-hour access to library lobby for pickup/return** (AMER 5%, APAC 0%, EMEA 9%); and **24-hour access to library building** (AMER 0%, APAC 0%, EMEA 3%).

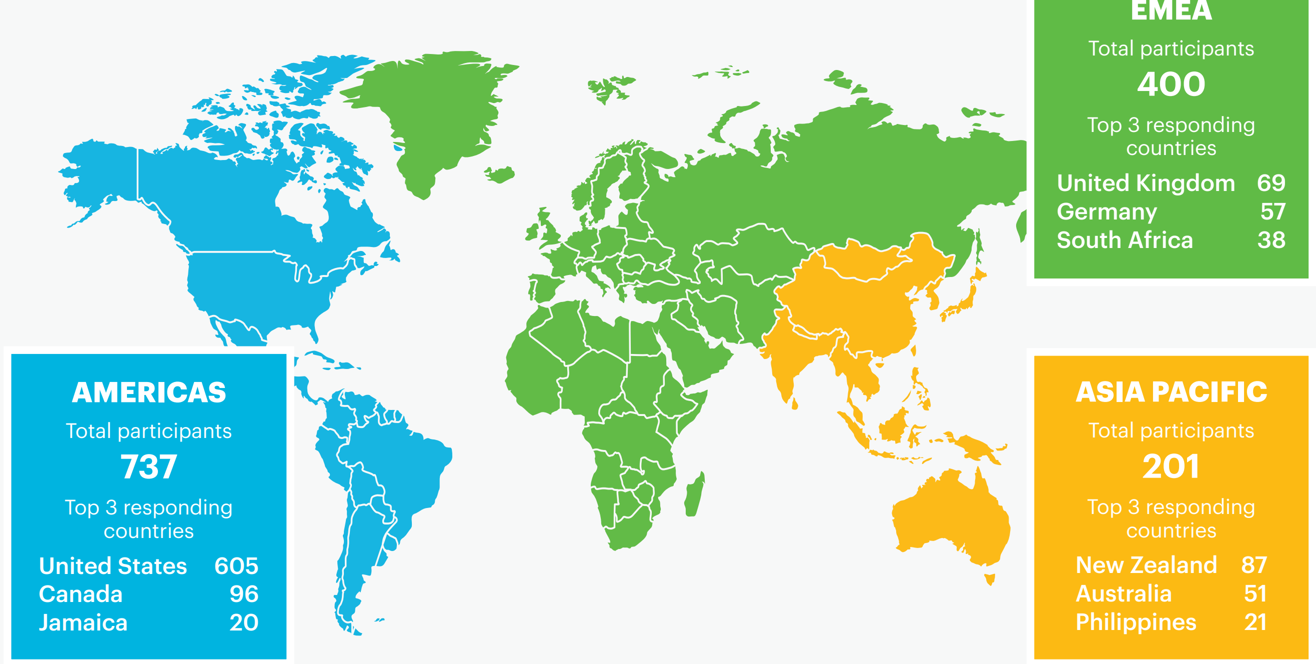
Across all regions, a majority of librarians said six factors greatly or somewhat impeded their ability to provide access to content.

Approximately 90% agreed **budgetary constraints** are a challenge, followed closely by **e-book lending restrictions**, **e-journal embargo restrictions**, and **e-content licensing restrictions**. Differences between regions are more evident with impediments such as **library space limitations** (APAC and EMEA 65% > AMER 56%) and **copyright laws** (APAC 82% and EMEA 78% > AMER 68%).



Remaining impediments to the providing of access to content with combined greatly/somewhat percentages are: **physical location of the library** (AMER 42%, APAC 51%, EMEA 41%); **ILL agreements** (AMER 33%, APAC and EMEA 45%); and **library circulation/loan policies** (AMER 37%, APAC 38%, EMEA 43%).

Global survey participation



Key Findings

90% of librarians believe that search engines are used most frequently to discover resources. 58% also believe that library users access the library catalog always or frequently. 65% believe that users solicit personal recommendations from peers, colleagues, faculty, etc. 84% of respondents indicate their library uses at least one discovery tool, with WorldCat® Discovery (36%) and EBSCO Discovery Service™ (35%) being the most popular. While 85% of respondents expect open access content to be covered in a discovery tool, considerably fewer (69%) believe users expect to find OA content there.

Both academic and public library respondents indicate a variety of delivery options. 62% indicate they offer streaming content. 76% of public library respondents offer mobile and desktop delivery of e-content, while less than two-thirds of academic libraries offer these delivery options. 15% of public libraries offer staffed satellite locations in non-library buildings; 14% offer unstaffed library kiosks; and 12% have drive-thru/curbside pick-up. 28% of academic libraries offer 24-hour access to library buildings; 20% offer staffed library satellite locations; and 18% allow 24-hour access to the library lobby for reserve pick-ups/returns.

91% indicate that budgetary constraints either greatly or somewhat impede their ability to provide access to content. Licensing restrictions also are impediments for the majority of respondents, and to address that, nearly a third advocate for more open access/OA in discovery (38%) and carefully review subscriptions and cancel ones with too many restrictions or only purchase new ones with few restrictions (30%). Nearly all respondents (92%) offer the option for customers to request new purchases, while only 9% offer users a link to purchase the item themselves.

Beyond discovery and fulfillment, respondents believe "the next big things" that will impact libraries and the services they provide include open access (46%), artificial intelligence (26%) and smart technologies (23%).

OCLC would like to thank the 1338 library professionals who completed the survey: 55% from 7 countries in the Americas, 30% from 47 countries in EMEA (Europe, Middle East, and Africa), and 15% from 14 countries in Asia Pacific. The majority (62%) of respondents are from academic (or education) libraries (college/university/higher education/research (55%); community college (4%); school (K-12) (2%) and other education (1%)). Nearly a quarter (22%) are from public libraries and (16%) are from other library types, such as government, special, research centers, consortia, museums, and national libraries.

Additional thanks to the OCLC Global Council Program Committee members who led this effort: Lorely Ambriz, Head Librarian/Assistant Professor, El Paso Community College (ARC); Diane Beattie, Senior Strategy Advisor & Deputy Librarian and Archivist, Library and Archives Canada (ARC); Earl Givens Jr., Library Director, Catawba College (ARC); Rocky Ralebipi-Simela, Professor, Department of Higher Education, Science and Technology (EMEA); Constance Wiebrands, University Librarian, Edith Cowan University (APRC).

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To learn more about the survey, visit oc.lc/discovery-fulfillment-survey.

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