

Section 1 Introduction

Annual reports and statistics are designed to describe the year's working results, and frequently include comparisons to the previous year. The purpose of a ten-year trend analysis is to consider the longer term; to even out any unusual years and to describe changes in the types of services offered. Such trends also provide an informed historical base line for questions about the future. Macro statistics at this level are designed to inform strategy and give policy makers and other stakeholders a clear picture of the wider issues affecting libraries.

This annual volume summarises key statistics for a wide range of library and information work in the UK. The base year for which most data are given is 2003-04, and wherever possible trends are analysed over the past ten years. The aim is to give as comprehensive a picture as possible of activity in libraries in the UK, by presenting sector-wide totals as well as a range of derived ratios. The commentary in each section draws attention to the major changes and trends, and highlights any unusual circumstances affecting the data. The publication is intended to provide information that is useful and interesting for library managers at all levels of their organisations. It is also a reference source for several groups of professionals from outside the library and information world, including politicians, journalists, academics, researchers and the book trade.

The Library and Information Environment

Some key contextual data relevant to the interpretation of the tables in this report are given in Section 5. In summary, some trends of note are:

- The population of the UK has increased by 2.4% over the last ten years, to 59.6 million
- The retail price index shows inflation running at 3.0% in 2004. Over five years the increase has been 12.9%, and over ten years, 29.6%
- The average consumer price paid for books in 2004 was £7.36, down 0.4% on the previous year
- The average price of academic books in 2004 was £42.25, up 0.5% on the previous year
- The average price of an academic journal in the UK in 2004 was £423, up 6.5% on the previous year
- There were over 10,000 chartered librarians working in all sectors in the UK in 2003-04, but this is a fall of 24% over the last five years

Summary of Key Findings

Some of the key results from this year's report are given below. More detail will be found in the body of the report.

Public Libraries

Total library expenditure per capita has increased for the sixth consecutive year, after adjustment for inflation. On average, £17.80 was spent per person in the UK in 2003-04.

More than half of total expenditure is on staff – 54%. Premises costs and central support costs account for just under 11% each, with books accounting for just 9%. Overall, materials for public use – including audio-visual material, newspapers and other acquisitions – represent 12% of total spending, £2.27 per person.

Trends in book expenditure per capita have become less variable, and the sectors are converging. Only Scotland continues to spend at a higher level per capita than the rest of the UK. Expenditure on audio-visual materials continues to increase – for every pound spent on books, 23p is spent on audio-visual materials. Spending on electronic resources of all kinds is now regularly collected, and although this is still small compared to more traditional materials, it has increased by 63% over the last five years, to just over £5 million for the UK as a whole.

Although public libraries stock more than 110 million books, this is 21 million less than ten years ago, and stock per capita has fallen in each of the last eight years. In the UK as a whole, libraries hold 1.9 books per person, although the English counties' average is just 1.5, while in Scotland and Northern Ireland there are 2.5 books per person. Acquisitions are currently at a rate of 10.9% of stock, 201 per 1,000 population. This is higher than five years ago, but 7% below the level ten years ago.

In contrast, stocks of audio-visual materials and CD-ROMs continue to rise overall, albeit slowly. Audio stock – talking books and music – has risen for the first time since 1995, while video stocks have increased year on year throughout the period covered. CD-ROM stock is now offered by 197 of the 208 public library authorities in the UK, although stock levels do not appear to be increasing at present. Overall, these materials represent a relatively small part of public library activity, with just one item for every seven members of the population, but their income-generating potential gives them considerable importance. Income from the hire of audio-visual materials is the largest single source of income for public libraries, accounting for nearly one quarter of the £112 million generated in 2003-04.

Book issues continue to fall, by 6% over the last year, and by a total of 40% over ten years. Both adult and children's issues are falling, although the rate of decline in children's issues has slowed considerably in the last two years. There are no signs of a levelling off of adult issues, and if the present rate of decline continues, the adult lending library may become a thing of the past within 15-20 years. However, steps are being taken to avert this, rather bleak, scenario. Under the Framework for the Future programme, the MLA is taking a coordinating role in assembling examples of good practice in public libraries, and disseminating these widely across the sector. Areas covered include book purchasing, presentation and display of collections, design and use of library buildings, and development of staff skills. Any effect of such measures will emerge in future editions of these statistics.

Audio-visual issues have not been subject to such decline, although the picture here is complicated by the increased investment being made in these areas. Combining data on issues and stock levels shows that stock turnover – issues per item per year – is falling for audio-visual materials as well as for books.

In contrast to the figures for use of materials, the number of visits made to public libraries in the UK has increased for the second year running. Data from the CIPFA PLUS surveys show that it is the IT facilities now available which are drawing visitors, with the proportion of library visitors who used a computer or the internet having doubled between 2001, when data were first collected, and 2003, the latest year for which statistics were available at the time of writing.

Total staff numbers continue to fall, although staff expenditure has increased. There are proportionately more professional staff in post, 41% compared to 38% ten years ago, although at one professional staff member per 10,000 population, levels have fallen by 18% over ten years.

There has been a further increase in opening hours in 2003-04, with 51 service points in England open for 60 or more hours per week, five in Wales and six in Scotland. This is an increase of 15% overall in the last year; there has also been an increase of 11% in the number open for 45-59 hours. In all, 33 library authorities now have one or more service points open for 60 hours per week.

There are areas in the latest statistics which point to the success of some of the original public library standards. Provision of computer workstations has increased dramatically in recent years, and has contributed to increasing visits. Requests are fulfilled more quickly, opening hours have been extended, and stock levels increased.

Statistics form one part of the evidence which is available to library managers and policy makers, and should be considered alongside the development of the public library impact measures and other 'soft' indicators. Public libraries have much to celebrate in the latest figures, but there is little room for complacency. There is an old Chinese curse – May you live in interesting times – and there are signs that public libraries may be facing some interesting times ahead. In such times there is a need for clear and irrefutable evidence of value and use of the services provided, and these statistics are an invaluable contribution to that evidence.

Higher Education Libraries

The potential user population in the higher education (HE) sector has grown considerably over the ten-year period, with a 44% increase in the number of FTE students. The number of students has increased year on year in every year except 2000-01. Various mergers within the sector have seen the total number of institutions fall by 8% over the ten-year period; however the total number of libraries has risen, in part due to merges between HE and further education (FE) institutions increasing the number of sites at which library services are required.

This growth in the sector has led to significant growth in library expenditure, by 79% over ten years. However, expenditure per FTE student has increased by only 24% over the period, compared to an inflation rate of 29%. On average, HE libraries now spend £293 per FTE student, 3% of the total institutional spend. Income is also increasing, with rises

ahead of inflation over both one and five years. £41 per FTE student was generated in 2003-04, representing 14% of total expenditure.

Information provision accounts for some 36% of total library expenditure. Of this, books account for 28%, serial subscriptions for 53% and electronic resources for 14%. The pattern of spending has changed considerably over the ten-year period considered in this report, although the detail is complicated by changing definitions in the data collection. It is clear, however, that there is a move away from printed materials towards electronic resources in general, and HE colleges in particular are increasing their investment in serials. The old universities continue to spend the largest proportion on serials, at 59% of the total. New universities and HE colleges spend proportionately twice as much as old universities on electronic resources.

The average prices paid for books continues to increase, albeit at a rather slower rate than academic book price inflation. However, for serials, the recent trend in average price paid is generally downwards, despite rapid increases in journal prices in recent years. The reasons for this are associated with the rise of electronic journals and the common practice of bundling large numbers of titles together at a discounted price. The recent rise in open access models of journal pricing may also be beginning to have an effect, although this is likely to be limited at present.

Academic libraries hold a total of 111 million books, 65 per FTE student. Holdings have kept pace with student numbers over the ten-year period. Additions to book stock per FTE student have fallen over the period, by 22% overall, and now represent just 2.6% of total stock, 1.7 items per FTE student. The stock is well used, however, with book issues per FTE student up by 3.7% this year to 54 items per student – 93 million books were issued in total in 2003-04, an increase of 63% over ten years.

The number of serial subscriptions continues to grow, with the number of subscriptions per institution having more than doubled in every sector over the last ten years. As indicated above, much of this growth is associated with the bundled “deals” incorporating large numbers of electronic titles at marginal additional cost to the library. In the new university sector, 70% of serial titles are now only available electronically, while in the old universities and HE colleges the proportion is one half.

Academic libraries employ over 10,200 staff to deliver their services, an increase of 27% over ten years. However, this has not kept pace with student numbers, and the number of FTE students per staff member has increased by 13% to 167. The new universities have the greatest number of students per staff member, at 199, with the old universities having the least: 145. The proportion of professional staff has been falling, however, to 37% overall compared to 41% ten years ago. Total expenditure on staff is almost £230 million, which equates to £135 per FTE student. The average cost of a staff member (including on-costs) is £22,438, an increase of 38% over ten years, compared to a rise of 50% in the Index of Average Earnings over the same period. The changing balance of professional and support staff will have helped to control costs, as will staff turnover rates, with senior staff being replaced by more junior personnel.

Library opening hours are traditionally long in academic libraries, and they are continuing to increase. Provision in terms of the number of seat hours per week per FTE student has increased by 7.1% over ten years to 8.4 hours per student per week. Provision is

greatest in the old university sector, and lowest in HE colleges; the greatest growth has been seen in new universities.

With the increasing emphasis on electronic resources noted above, it is only to be expected that the provision of computer workstations within the library has also increased. Almost 43,000 workstations are now provided, three times the level of ten years ago, and one for every 40 FTE students. In new universities and HE colleges, around 30% of library seats are equipped with workstations; in the old universities the proportion is rather lower, at 20%.

In contrast to public libraries, visits per FTE student are falling in academic libraries. The reasons may be associated with the increasing provision of electronic resources – while in public libraries the IT facilities and electronic resources appear to be attracting users, in academic libraries such resources are readily available at workstations remote from the library premises, in departmental computer laboratories and at researchers' desktops. Book lending is increasing, and as users make fewer reference visits to the library, the number of books borrowed per visit is increasing.

Academic libraries and their collections – both printed and electronic – are clearly an important resource for their parent institutions. They continue to be well used, although the patterns of use are changing as the methods of delivery of information change. It is clearly essential to develop suitable metrics to monitor the changing library environment, and ensure that provision continues to meet users' needs and match their expectations.

National Libraries

In real terms, after allowing for inflation, the grant-in-aid to The British Library has fallen by 23% over the last ten years. Other sources of income have also fallen in real terms, and the total resources available were £120 million in 2003-04. Staff salaries account for 54% of the total, compared to 45% ten years ago, while the total number of staff has fallen slightly, by 4% to 2,246. The number of reader visits decreased by 2.4% in 2003-04, falling for the third consecutive year; it is now below 400,000. The number of items consulted has also fallen, by 8% in the last year. At St Pancras 93% of readers rate the staff as 'excellent' or 'good', while 92% rate the services and facilities as 'excellent' or 'good'. The most highly rated aspect was the range and depth of the collections, while the least satisfaction was expressed with the microfilm/microfiche reading facilities.

At the National Library of Scotland, acquisitions of monographs and new media items rose by 12.3% and 9.9% respectively. There was a small decrease in user visits, of 1.3%, but the number of items consulted rose by 8%. In contrast to England and Scotland, the number of users at the National Library of Wales increased, by 14%, and the number of postal enquiries also rose, by 26%.

Government Department Libraries

The statistics collected by the Committee for Departmental Librarians have been revised this year, and a new form of return introduced. It is difficult to describe trends in this sector, as the returns are rarely complete in any year, and changes in the remit and coverage of government departments impact on their libraries. No attempts are therefore made to estimate for missing data in this sector, and as there is little information available on users, per capita ratios cannot be calculated.

In 2003-04, almost £1 million was spent on monographs by 18 (out of 23) libraries, but £2.9 million on serials, including electronic serials. Total expenditure on information provision by these 18 libraries was over £5.2 million. In contrast, just £305,000 was spent on staff. Data on stock held were collected for the first time, with 15 libraries reporting just over one million items held, and 16 libraries a total of just under 10,000 serial titles. A wide range of activity is undertaken for the staff of the parent departments, including current awareness, information briefings, user training and promotion. The latest survey also indicates that this sector too is undergoing a period of change, with new services being introduced in many libraries.

Notes on the compilation of this report

The statistics are presented in four major sections. Section 2 covers public libraries, and is based on data collected by the Chartered Institute of Public Finance and Accountancy (CIPFA), enhanced by LISU. Local government reorganisation, which ran from 1 April 1995 to 1 April 1998, has affected the completeness of the original data set in some years, and affected the provision of trend analyses. These issues are discussed in the introduction to Section 2.

Data from CIPFA PLUS concerning public library use, users and user satisfaction, have again been included in this section. CIPFA PLUS is a national standard for the undertaking of user surveys in public libraries, which has been widely adopted throughout the UK.

Section 3 deals with libraries in institutions of higher education. Following work carried out by LISU with the support of the Society of College, National and University Librarians (SCONUL), comparable figures can now be presented for the whole higher education library sector. Separate figures are shown for old universities (those incorporated before 1991), new universities (former polytechnics and other institutions, incorporated after 1991), and HE colleges.

Section 4 deals with some of the other types of library in the UK. Special libraries are a particularly diverse group, and there is little information collected. For a number of years, LISU has attempted to collect reliable trend information from some types of special library, but the changing nature of the sector has rendered this almost impossible. In previous years, data have been presented for libraries within the NHS, and for Government Departmental libraries. Regrettably, the surveys undertaken within the NHS library sector have been poorly completed in the last two years, and no figures can be included this year. LISU has been working with the NHS LKDN (Learning and Knowledge Development Network) to revise their data collection procedures, and is hopeful that national level statistics will become available within the next two to three years. Data from Government Department libraries are included, collected by the Committee of Departmental Librarians, and figures are available for a number of years. The figures are not complete, and trends are affected by the differing respondents in each year, and the changes in the organisation of the parent departments.

Section 4 also includes data from the British Library and from the National libraries of Wales and Scotland. These figures are somewhat limited in scope, being drawn from the published annual reports of the three bodies, and are not generally comparable between the three libraries.

Section 5 contains some statistics of more general interest, including population data, and a selection of price indexes relevant to librarians in all sectors. It also gives some general information on the book trade and a summary of statistics from the Registrar of Public Lending Right. Sector-wide data on the library profession have also been included in this section this year.

There are a number of important library sectors for which no data can be included. School libraries and those in colleges of further education are not well served by statistics, with biennial surveys in recent years which do not lend themselves to the estimation of sector totals. Reference has already been made to the relative lack of data on special libraries and information centres. It seems unlikely that sufficient reliable data in sectors such as industrial and commercial companies, voluntary organisations, and professional bodies will be available in the foreseeable future. There are many disciplines which are major consumers of information in its widest sense, but unless the librarians themselves see a need for comparable data, and their parent organisations are prepared to let them reveal it, they will be forever hampered compared to their colleagues in the public and academic sectors.

Measures included

In much of the recent debate on performance measurement in libraries, the emphasis has been on the quantity and quality of output measures and on user satisfaction. There is greatly increased activity in these areas, both from individual local initiatives and from more co-ordinated work. CIPFA PLUS membership comprises over 90% of the public library authorities in the UK, promoting a standard form of user survey for adult public library visitors, with a separate set of questionnaires suitable for children. There are a number of benchmarking clubs and projects within both the academic and public library communities. In the area of higher education libraries, a brief set of library management statistics is produced annually by SCONUL, intended to inform the most senior managers in higher education institutions about the state of their libraries.

However, outputs need to be related to inputs to gain a full picture. Many of the data in this volume are concentrated on expenditure (and income), staff and stock, together with the most prominent output measures of issues and visits. More data on electronic information sources would be desirable; at present the statistics are limited by the diversity of sources and the lack of agreed definitions in this area. Much work has been done in recent years to improve the quality of data related to electronic information, and statistics of provision are sufficiently reliable for inclusion in this report. However, statistics of use are still problematic, so only a part of the picture can be given. Project COUNTER¹ is expected to improve data availability in this area, and some progress has already been made.

The information here is presented in sector summary tables. Information on individual libraries can be found in the CIPFA *Public Library Statistics Actuals* series, SCONUL *Annual Library Statistics* (academic libraries) and CDL Statistics series (Government departmental libraries). Full references can be found in the Bibliography.

Benchmarking

One main objective of this volume is to assist librarians in making comparisons of their performance with others. This is one stage of formal benchmarking, and enables

¹ www.projectcounter.org/ [accessed 15/11/05]

managers to show evidence of their relative strengths and weaknesses, and plan and lobby for future developments. Few managers these days will need to be warned of the dangers of making superficial comparisons through statistics. Amongst the stratagems adopted here to minimise such a potential problem are:

- the year-on-year analysis which permits a comparison of trends, and is more reliable than a comparison of absolute figures for a single year
- the presentation of sector averages, which minimises the effects of unusual results from unusual institutions. Separate summaries are shown for old and new universities and HE colleges; and public library data are summarised by authority type (counties, metropolitan districts, etc). Even these groupings are far from homogeneous, and require careful interpretation: for instance, Oxford, Cambridge and London stand apart from other old universities because of their size; whilst Birmingham, Manchester, and a few other cities run very large regional reference libraries which distinguish them from other metropolitan districts

Taking this approach a stage further, LISU offers a statistical benchmarking service to public and academic librarians. An authority or institution's performance in areas of interest can be compared over a period of up to ten years with all libraries in their sector, and also with a small family of the libraries closest to them in type. Librarians often find an advantage in having objective analysis and commentary from an outside institution. The data are already on the LISU databases, and the analysis can be done quickly, by a qualified statistician, at a reasonable price.

Data quality

If data in a time series are to be comparable, they should be complete, error-free, and based upon consistent definitions. These conditions are never likely to be fully achieved, particularly when timely publication of data is also important.

The two main data sets on which this report is based are the CIPFA *Public Library Actuals*, and the SCONUL returns for academic libraries. Neither of these surveys attract a 100% response every year, although they come very close, generally achieving over 90%, and, for CIPFA in particular, over 95% of eligible responses. For public libraries, LISU has partly tackled the problem of incompleteness in previous years by sending out a supplementary questionnaire to obtain detail omitted from the CIPFA returns. There is also – for both public and academic libraries – a methodology for filling gaps in the database. These procedures are explained in the relevant commentaries.

Consistency of definition continues to be a major problem. This applies particularly to expenditure statistics, where accounting conventions change and vary. The treatment of capital revenue is a problem. So too is the handling of running costs which – especially in academic and special libraries – are often absorbed wholly or partially into central services, making comparisons very difficult. LISU spends much time following up errors or discrepancies in data received, where these are obvious enough to spot. Inevitably, some errors will remain. It is our policy to correct errors whenever and wherever possible, which may result in some of the historical data presented here differing from those published in previous years.

Further information on LISU can be obtained from the address at the front of this volume, or by visiting our web site at www.lboro.ac.uk/departments/dis/lisu