

Section 3 Academic library statistics

Introduction

This section is concerned with libraries in universities and other institutions of higher education - the sector generally meant when 'academic' libraries are mentioned. Libraries in colleges of further education and in schools do not provide comprehensive management data to a central source on a regular basis at present, and little can be included. The bibliography includes details of research reports carried out in these sectors in recent years.

Figures are presented separately for three main institutional groupings:

- **'old' universities** – those already incorporated prior to 1992, and originally funded by the Universities Grants Commission. These include the group of universities founded in the early 1960s as well as the longer established institutions, and the Open University.
- **'new' universities** – former polytechnics and other institutions which were incorporated as universities in 1992 or subsequently. This group is growing as some of the larger HE colleges are becoming universities – three new universities are included for 2003-04.
- **'HE' colleges** – other institutions funded by the HE funding councils in the UK, but which are not formally incorporated as universities. These are a particularly diverse set of institutions, including large colleges with a wide range of access and undergraduate programmes to small specialist institutions offering largely postgraduate study.

The overall total for the UK is also given. Libraries in independent institutions (e.g. the University of Buckingham) are not included.

Sources of statistics

In parallel with the organisational changes in the sector, the agencies responsible for collecting data have also changed. This has led to fragmented reporting, discontinuities in time series, and figures which cannot be compared across the different parts of the sector. Previous editions of this report have included figures from the Universities Statistical Record, the Higher Education Statistics Agency (HESA), the Standing Conference of National and University Librarians (SCONUL), the Council of Polytechnic Librarians (COPOL) and the HE Colleges Learning Resources Group (HCLRG), all collected on different bases.

In 2000, SCONUL and HCLRG merged to form a single body to represent Higher Education libraries – the Society of College, National and University Librarians (SCONUL) and a single data collection exercise ensued, based on the original SCONUL returns. The merger led LISU to re-examine its databases of academic library statistics, creating a single set of data applicable to all HE libraries, derived from the separate sets of returns received.

SCONUL's annual data collection exercise is overseen by a Working Group on Performance Improvement, which regularly reviews and updates the information collected. Recent developments have included collecting extended data on the provision and use of electronic materials, to assess the impact of changing technologies on academic libraries. Relevant figures will be incorporated into this report as and when sufficiently complete and reliable

data become available. Readers who require further information on the detailed definitions used by SCONUL should consult their website, where a sample return and set of definitions are available (http://www.sconul.ac.uk/pubs_stats/statques.html).

Institution level data are drawn from that supplied to the Higher Education Statistics Agency (HESA), which collects a great deal of information about higher education institutions, but little detail on their libraries. However, their figures on numbers of FTE students and academic staff, and overall institutional expenditure are comprehensive, and have been used for some tables in this report. Additionally, the data on numbers of FTE students have been used to gross up SCONUL and HCLRG database figures to allow for non members (*see below*). Figures are available in full from 1994-95 onwards; some limited data on FTE student numbers are available for earlier years (*Table 3.1, page 125*).

The remainder of the figures are extracted from the LISU database of academic library statistics, based on data originally collected by SCONUL and HCLRG, and published in their *Annual Statistics* volumes (*see Bibliography, pages 181-186*).

Estimation for missing data

The majority of HE institutions are members of SCONUL and so complete the appropriate annual statistical returns. Some HE colleges which are not members also habitually make returns. These returns give a great deal of information about individual libraries, and make this section of our report possible. To create the LISU database, each institution is considered separately, using all available information to correct for data which do not conform to the standard definitions, or which are not available. As each new year's data are added, the previous figures are checked for consistency, and any apparent discrepancies checked with the institutions concerned. The reasonableness of previous estimates is also examined, and adjustments made if necessary. This may result in changes to the detail of the figures presented here compared to those in previous editions.

However, there remains a considerable degree of estimation in some areas; in particular coverage of the HCLRG returns was poor in the first years. Where this is thought to have a potentially significant effect on any of the tables, it has been indicated in the accompanying commentary.

The SCONUL and HCLRG databases are completed for all members of the two groups, as described above. However, membership is not compulsory, although SCONUL now covers 99.5% of students (FTE) in UK higher education. We aim in this report to produce data which relate to the whole of the sector in each year, and so facilitate the examination of trends in activity levels. In order to achieve this, it is necessary to allow for those institutions which are not included in the reported statistics. This is done by adding in a percentage to the reported totals, based on the proportion of total students in the non-member institutions. All new universities have been SCONUL members since 1991-92, and no further grossing up is therefore required for this sector. In 2003-04, just eight UK HE institutions were not members of SCONUL or have never completed a return. These are six HE colleges, and two London medical schools. The grossing up factors applied for each year are shown overleaf:

	Old universities	HE colleges
1993-94	+ 2.0%	+ 35%
1994-95	+ 1.7%	+ 22%
1995-96	+ 1.3%	+ 19%
1996-97	+ 1.3%	+ 16%
1997-98	+ 0.8%	+ 15%
1998-99	+ 0.4%	+ 5%
1999-00	+ 0.4%	+ 12%
2000-01	+ 0.3%	+ 9%
2001-02	+ 0.3%	+ 9%
2002-03	+ 0.1%	+ 3%
2003-04	+ 0.1%	+ 4%

Order of the tables

This section is presented in the following format:

- **Summary of key trends** – overall summary statistics for each of the three sectors (*Tables 3a-3c, pages 118-123*)
- **Client base** – figures on the numbers of libraries and numbers of users (*Table 3.1-3.2, pages 124-125*)
- **Overall financial figures** – expenditure and income (*Tables 3.3-3.5, pages 126-129*)
- **Resources** – Information provision expenditure, stock and issues (*Tables 3.6-3.12, pages 130-139*)
- **Staffing** – staff numbers and expenditure (*Tables 3.13-3.14, pages 140-141*)
- **The user experience** – opening hours, seating and levels of use (*Tables 3.15-3.19, pages 142-147*)

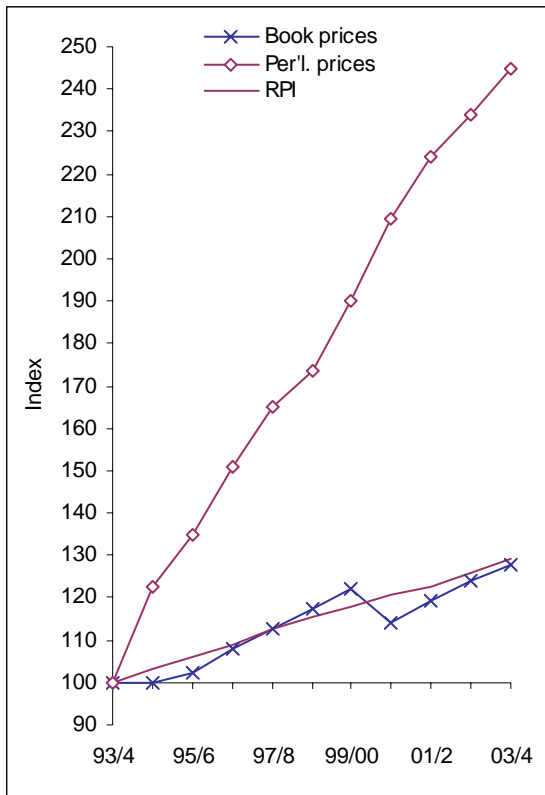
Note that in the main tables for this section, the percentage changes over one, five and ten years have been calculated on the full data, before rounding. They may therefore differ slightly from changes calculated from the printed figures which have in most cases been rounded for presentation.

Tables 3a–3c Summary of key trends

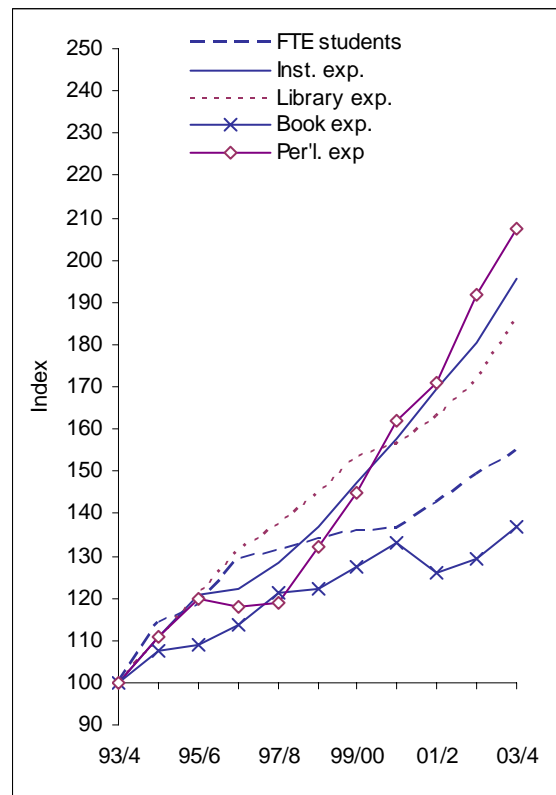
Fig 3.1 summarises the key trends in academic library expenditure over the last ten years; relevant price indexes are also presented for comparison. There are clear differences between the sectors, most notably in relation to book expenditure. Tables 3a–3c present an overview of the key trends for the three sectors separately, each with a short commentary on the data.

Fig 3.1 Indexes of expenditure

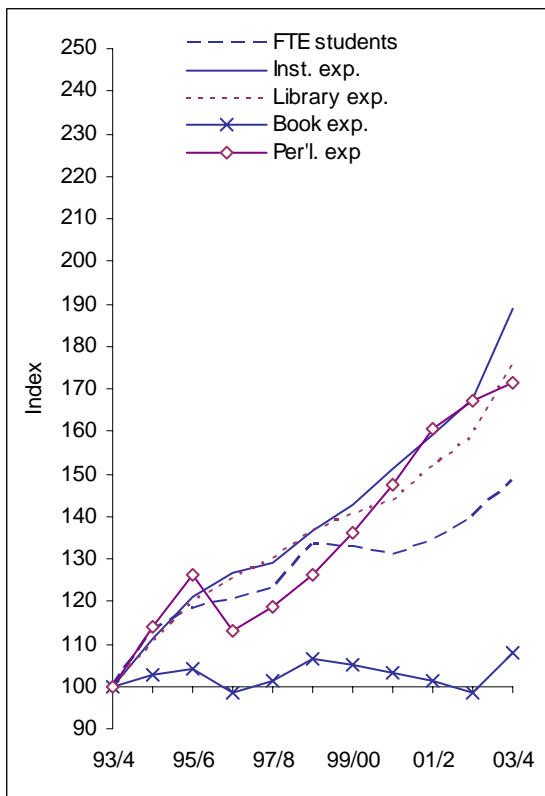
a) Price indexes



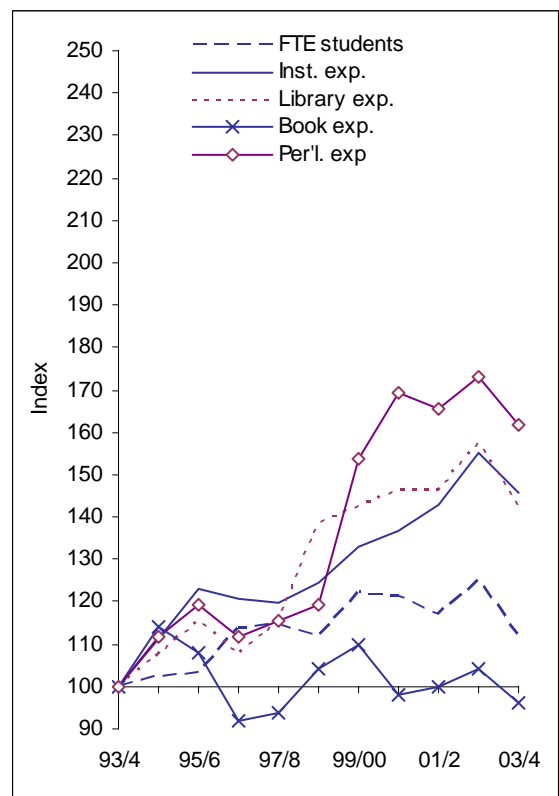
b) Old universities



c) New universities



d) HE colleges



Old universities

The old university sector has expanded rather more quickly than either the new university or HE college sectors. It is the largest of the three sectors, now accounting for half of all of FTE students in higher education. The number of institutions has been affected by mergers and de-mergers within the University of London. The number of library service points has increased over the ten year period by almost 70%; however part of this increase is an artefact of the way in which the college libraries of Oxford University have been counted (see page 124).

The number of professional librarians has increased by almost 6% this year, leading to a fall of 1.8% in the number of students per staff member. Staff expenditure has also grown, but has fallen as a percentage of the total for the third consecutive year.

Total library expenditure has risen by some 85% over ten years; rather less than total institutional expenditure, at 97% (Fig 3.1). Old universities spent 2.8% of their total budgets on library provision in 2003-04, a figure which has changed little in recent years, and which is below the equivalent for the other sectors. The proportion spent on staff has fallen from 52% to 48%, while the proportion spent on information provision has increased slightly, from 37% to 38%. This is in contrast to the pattern in public libraries, where cuts in the book fund have led to an increasing proportion of the total being spent on staff (see Table 2a, page 15).

Equipment expenditure has doubled over the period, and other expenditure risen by 165%. Together these account for 13.5% of total library expenditure, compared to 10.7% ten years ago. The rise in equipment expenditure is perhaps indicative of the changing mode of delivery of library services, bringing an increased reliance on electronic serials and other resources, with an associated requirement for improved computing facilities.

Although spending on books has increased by 37% over the period, when the increase in student numbers is taken into account, this increase turns into a drop of 12%, and the position worsens further under the effects of book price inflation. For periodicals the decline in real expenditure per student has slowed in the most recent years, with little change since 1997-98. The proportion of information provision expenditure on serials (including electronic serials) has risen in each of the last four years. Fig 3.2 illustrates trends in the breakdown of information provision expenditure.

Loans have kept pace with student numbers over the period and increased again this year. Loans per FTE student is now at its highest level over the period, and has increased by 8.7% compared to 1993-94. Although the number of visits to library premises has increased by 20% over ten years, visits per student have fallen by 22%. This situation is not confined to the old university sector, and possible reasons are discussed at Table 3.17

(page 144).

Fig 3.2 Breakdown of expenditure on information provision – Old universities

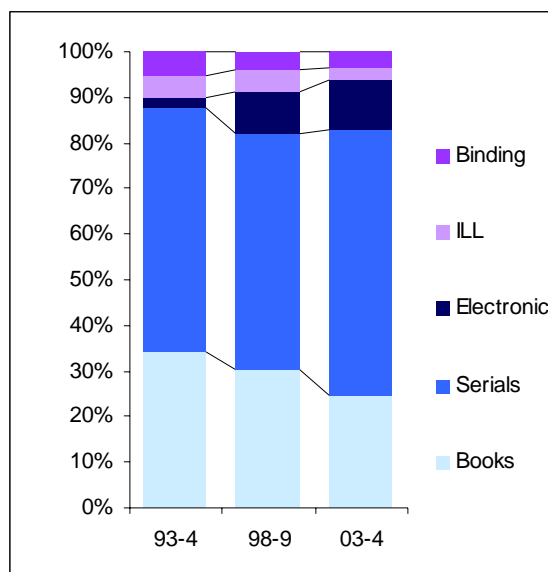


Table 3a Summary statistics for old universities

		1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
No of institutions		75	75	72	72	69	67	67	67	67	68	68
FTE students	('000)	550	629	650	712	722	736	747	750	785	821	852
FTE academic staff	('000)		65	70	71	71	73	77	79	82	84	81
No of libraries		320	340	350	390	400	400	450	450	530	540	540
Professional librarians	(FTE)	1,800	1,830	2,010	1,800	1,830	1,840	1,890	1,920	1,900	1,940	2,050
Students per professional librarian		306	344	323	396	395	400	395	390	413	423	415
Total institutional expenditure	(£m)	5,689	6,311	6,859	6,948	7,288	7,790	8,368	8,981	9,631	10,260	11,116
Total library expenditure	(£m)	167	184	202	219	229	242	256	261	272	286	310
<i>Proportion of total on library</i>		2.9%	2.9%	2.9%	3.2%	3.1%	3.1%	3.1%	2.9%	2.8%	2.8%	2.8%
Staff expenditure	(£m)	87	93	101	109	114	120	128	129	135	140	150
<i>Proportion of total</i>		52.0%	50.6%	50.1%	50.0%	49.9%	49.8%	49.7%	49.7%	49.5%	49.1%	48.3%
Information provision expenditure	(£m)	62	68	72	77	81	85	94	99	103	111	119
<i>Proportion of total</i>		37.2%	36.8%	35.8%	35.2%	35.1%	35.3%	36.6%	38.0%	38.0%	38.6%	38.3%
Equipment expenditure	(£m)	11	14	16	18	20	20	20	17	15	16	22
<i>Proportion of total</i>		6.3%	7.8%	7.7%	8.3%	8.5%	8.2%	7.7%	6.4%	5.6%	5.6%	7.2%
Other expenditure	(£m)	7	9	13	14	15	16	18	17	19	20	20
<i>Proportion of total</i>		4.4%	4.9%	6.4%	6.5%	6.5%	6.7%	7.0%	6.4%	6.9%	6.8%	6.3%
Book spend	(£m)	21.2	22.8	23.1	24.1	25.7	25.9	27.0	28.2	26.7	27.4	29.0
Book spend per FTE student	(£)	39	36	36	34	36	35	36	38	34	33	34
Real book spend per FTE student ⁽¹⁾	(2003 £)	49	46	44	40	40	38	38	42	36	34	34
Periodical spend	(£m)	33.5	37.2	40.1	39.5	39.8	44.2	48.5	54.2	57.3	64.2	69.4
Periodical spend per FTE student	(£)	61	59	62	56	55	60	65	72	73	78	82
Real periodical spend per FTE student ⁽²⁾	(2003 £)	149	118	112	90	82	85	84	85	80	82	82
Annual loans	(m)	28.1	30.0	31.4	33.8	35.6	37.0	37.5	39.0	41.5	42.7	47.3
Loans per FTE student		51	48	48	48	49	50	50	52	53	52	56
Annual visits	(m)	52.4	53.7	55.0	55.8	59.5	61.0	62.0	60.6	59.4	59.6	63.0
Visits per FTE student		95	85	85	78	82	83	83	81	76	73	74

⁽¹⁾ Adjusted using LISU index of academic book prices - Table 5.3a, page 165

⁽²⁾ Adjusted by composite periodical price index - Table 5.4, page 167

New universities

The new university sector has been less affected by mergers than the old universities, and the growth in student numbers has been less pronounced. However, the incorporation of three former HE colleges as universities this year has led to expansion of the sector. The total number of library service points and the number of professional librarians have both increased as a result, although this sector continues to have the highest number of students per professional staff. At 512 students per staff member in 2003-04, this has increased by 21% over the ten year period.

New universities spend a slightly higher proportion of their total budget on libraries than the old universities. Despite an increase of almost 5% in total library expenditure this year (excluding the three new members), the proportion of the institutional total has fallen to 3.5% – the lowest level recorded over this period. Slightly less of the budget is allocated to information provision and more to staff than in the old university sector. The proportions spent on staff and information provision have both fallen back slightly this year, while the proportion on equipment has risen.

Around one third of the information resources budget is now spent on books, compared to almost half ten years ago. The proportion spent on serials (including electronic serials) has increased slightly, while the most dramatic increase has been in the proportion spent on electronic resources, which now comprises 20% of the information resources budget (Fig 3.3). Book spending has failed to keep pace with student numbers, however, and while periodical spend per FTE student has increased by 18% over ten years, this has not been enough to keep up with the considerable rise in periodical prices over the same period.

In common with the old universities, both total loans and total visits have increased slightly this year. Visits per student continue to fall, however, at a slightly faster rate than in the old universities. One reason for this may be the greater investment in electronic resources being made in new universities, with an increased availability of resources at locations remote to the library building.

Fig 3.3 Breakdown of expenditure on information provision – New universities

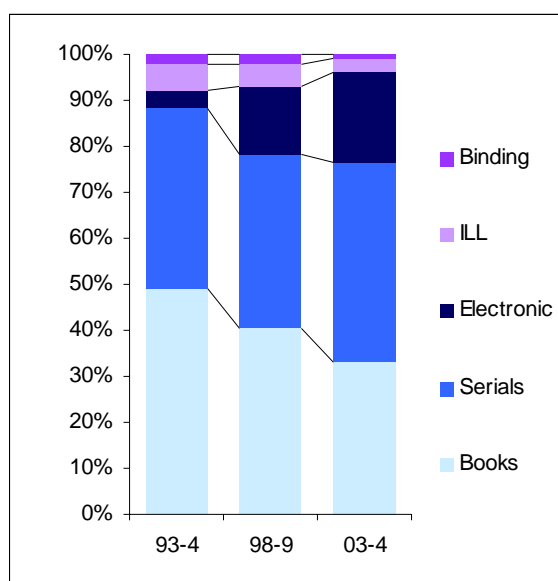


Table 3b Summary statistics for new universities

		1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
No of institutions		42	42	42	42	42	42	42	42	43	42	45
FTE students	('000)	457	517	540	551	561	610	607	599	614	639	678
FTE academic staff	('000)		30	32	31	31	32	33	33	33	34	34
No of libraries		196	204	222	250	243	223	218	211	214	209	217
Professional librarians	(FTE)	1,053	1,113	1,159	1,198	1,221	1,249	1,255	1,247	1,278	1,261	1,325
Students per professional librarian		434	465	466	460	459	488	483	481	480	507	512
Total institutional expenditure	(£m)	2,309	2,566	2,790	2,922	2,981	3,155	3,298	3,486	3,671	3,872	4,362
Total library expenditure	(£m)	87	96	104	109	113	119	122	125	132	138	153
Proportion of total on library		3.8%	3.7%	3.7%	3.7%	3.8%	3.8%	3.7%	3.6%	3.6%	3.6%	3.5%
Staff expenditure	(£m)	44	48	54	56	58	60	64	66	70	75	82
Proportion of total		50.3%	50.6%	51.4%	51.8%	51.9%	50.8%	52.8%	53.0%	52.8%	54.5%	53.8%
Information provision expenditure	(£m)	31	33	36	37	38	40	41	42	44	45	49
Proportion of total		36.0%	35.0%	34.1%	33.8%	34.0%	34.0%	33.9%	33.8%	33.2%	32.6%	32.0%
Equipment expenditure	(£m)	7	9	9	10	10	11	9	9	9	8	11
Proportion of total		8.3%	9.7%	8.3%	9.3%	8.7%	9.2%	7.5%	7.1%	6.8%	5.9%	7.3%
Other expenditure	(£m)	5	4	7	6	7	7	8	8	10	10	11
Proportion of total		5.3%	4.6%	6.3%	5.3%	5.9%	6.2%	6.2%	6.3%	7.2%	7.4%	6.9%
Book spend	(£m)	15.3	15.7	15.9	15.1	15.5	16.3	16.1	15.8	15.5	15.1	16.5
Book spend per FTE student	(£)	33	30	29	27	28	27	27	26	25	24	24
Real book spend per FTE student ⁽¹⁾	(2003 £)	43	39	37	32	31	29	28	30	27	24	24
Periodical spend	(£m)	12.2	13.9	15.4	13.8	14.5	15.4	16.6	18.0	19.6	20.4	20.9
Periodical spend per FTE student	(£)	27	27	29	25	26	25	28	30	32	32	31
Real periodical spend per FTE student ⁽²⁾	(2003 £)	65	54	52	41	38	36	35	35	35	34	31
Annual loans	(m)	22.1	25.0	26.6	29.7	30.2	31.5	30.9	30.5	32.8	34.1	36.2
Loans per FTE student		48	48	49	54	54	52	51	51	53	53	53
Annual visits	(m)	37.9	38.8	41.0	44.5	44.9	45.5	43.2	43.2	43.2	43.8	45.4
Visits per FTE student		83	75	76	81	80	75	71	72	70	69	67

⁽¹⁾ Adjusted using LISU index of academic book prices - Table 5.3a, page 165

⁽²⁾ Adjusted by composite periodical price index - Table 5.4, page 167

HE colleges

The HE colleges include all non-university institutions funded by the HEFCs in the UK, and include both large general colleges and smaller specialist institutions. They are a particularly diverse group, and performance in any individual college may differ dramatically from the overall picture presented here. There are three fewer colleges this year than last, as some have become universities; more are set to move into the new university sector next year. There are fewer multi-campus institutions than in the university sectors and this is the smallest sector, now accounting for just 10% of UK HE students (FTE).

The changing composition of this sector complicates the interpretation of trends. There has been no change overall in the number of students per staff. This is below the level of the new universities, but around 5% higher than in the old universities.

The proportion of total institutional expenditure on the library has varied rather more than in the university sectors, and is now at a level similar to that in the new universities. A greater proportion of total expenditure is made on staff and less on information provision than in either of the university sectors. The proportion on staff has fallen slightly this year, while the proportion spent on information provision has increased.

A greater proportion of the information budget is spent on books, and less on serials, than in the university sectors, although the balance is changing. Investment in electronic resources is proportionately at similar levels to the new universities (*Fig 3.4*).

Book spend per student is higher than that in the new universities, although it has fallen by 14% since 1993-94, despite a slight increase this year. Expenditure on periodicals per FTE student has increased slightly this year, and at £24 per FTE student is 50% higher than ten years ago.

Loans per FTE student have been fairly stable, and are a little below the levels reported in the university sectors. Visits per FTE student have increased this year, and visits have held up well over the ten year period, compared to the university sectors. Possible reasons for this different pattern can only be speculative, but may include the relative proportions of taught versus research students, who have different requirements from the library, and different patterns of library use.

Fig 3.4 Breakdown of expenditure on information provision – HE colleges

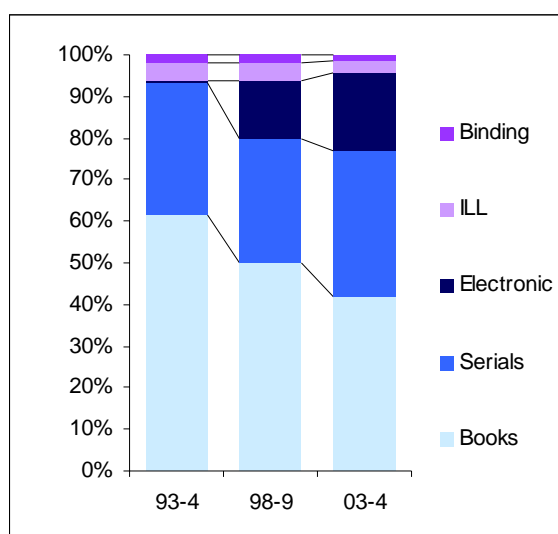


Table 3c Summary statistics for HE colleges

		1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
No of institutions		67	65	66	63	63	60	60	57	60	60	57
FTE students	('000)	160 ⁽¹⁾	164	165	182	183	179	195	194	187	200	178
FTE academic staff	('000)		10	11	10	10	9	10	10	10	10	8
No of libraries		110	100	100	90	90	100	110	130	120	110	100
Professional librarians	(FTE)	430	430	430	420	430	510	510	450	450	450	400
Students per professional librarian		371	381	384	434	426	351	382	432	415	444	444
Total institutional expenditure	(£m)	782	869	964	943	937	974	1,038	1,071	1,118	1,213	1,141
Total library expenditure	(£m)	26	28	30	28	30	36	37	38	38	41	37
Proportion of total on library		3.3%	3.2%	3.1%	3.0%	3.2%	3.7%	3.6%	3.5%	3.4%	3.4%	3.2%
Staff expenditure	(£m)	13.7	15.3	16.0	15.2	16.5	20.5	21.4	21.6	21.9	23.7	21.2
Proportion of total		53.0%	55.1%	53.9%	54.6%	54.7%	57.0%	57.1%	56.6%	57.6%	58.1%	57.6%
Information provision expenditure	(£m)	8.1	9.2	9.2	8.6	8.9	10.4	11.7	11.6	11.4	12.3	11.8
Proportion of total		31.3%	33.3%	30.9%	31.0%	29.6%	29.0%	31.2%	30.4%	30.0%	30.2%	31.9%
Equipment expenditure	(£m)	2.7	2.8	3.0	2.5	2.9	3.5	3.5	2.5	2.5	3.0	1.8
Proportion of total		10.6%	10.0%	10.0%	8.8%	9.8%	9.7%	9.4%	6.6%	6.7%	7.3%	5.0%
Other expenditure	(£m)	1.3	1.2	1.6	1.6	1.8	1.6	1.4	2.2	2.2	2.1	2.0
Proportion of total		5.1%	4.4%	5.2%	5.6%	5.9%	4.4%	3.8%	5.8%	5.8%	5.2%	5.4%
Book spend	(£m)	5.0	5.7	5.4	4.6	4.7	5.2	5.5	4.9	5.0	5.2	4.8
Book spend per FTE student	(£)	31	35	33	25	26	29	28	25	27	26	27
Real book spend per FTE student ⁽²⁾	(2003 £)	40	45	41	30	29	32	29	28	28	27	27
Periodical spend	(£m)	2.6	2.9	3.1	2.9	3.0	3.1	4.0	4.4	4.3	4.5	4.2
Periodical spend per FTE student	(£)	16	18	19	16	16	17	21	22	23	23	24
Real periodical spend per FTE student ⁽³⁾	(2003 £)	40	35	34	26	24	25	27	26	25	24	24
Annual loans	(m)	6.9	7.9	8.1	8.7	9.3	9.3	10.2	10.1	9.6	10.2	9.3
Loans per FTE student		43	48	49	48	51	52	53	52	51	51	52
Annual visits	(m)	11.9	13.2	12.6	13.2	13.8	13.9	15.2	15.4	14.9	15.1	13.9
Visits per FTE student		75	81	76	72	75	78	78	79	80	76	78

⁽¹⁾ Estimated⁽²⁾ Adjusted using LISU index of academic book prices - Table 5.3a, page 165⁽³⁾ Adjusted by composite periodical price index - Table 5.4, page 167

Tables 3.1 – 3.2 Client base

Table 3.1 shows the numbers of FTE students and FTE academic/academic related staff in all UK higher education institutions. These figures are primarily taken from HESA reports (*see Bibliography, pages 181-186*); data for academic staff are not available for 1993-94. The figures presented here for FTE students have been used to give comparable per-capita figures for this section of the report.

Table 3.2 shows the number of institutions reporting to HESA, and the estimated number of library service points managed by their librarians. One important omission from this table prior to 1999-2000 has been the individual college libraries of the Oxford and Cambridge colleges, although the main university libraries of both institutions are included.

These two tables show contrasting pictures. The number of potential users has grown throughout the period, whereas the number of institutions has fallen. The growth in user numbers is largely the result of government initiatives to increase the number of students in higher education in the UK; there is a small element from mergers of FE colleges with HE institutions. There has been an increase of 2.9% overall in FTE student numbers this year, bringing the total increase over ten years to 44%.

The falling number of institutions is the net result of mergers within the sector and new institutions coming under the HESA umbrella for the first time. The number of libraries increased until 1997-98, partly as a result of new building, and partly from the acquisition of libraries from the FE sector as institutions merged. A number of libraries have subsequently been closed as facilities are concentrated on major sites. This concentration of resources may be cost effective but could have a detrimental effect on the service to students if library facilities are withdrawn from teaching sites. The large increases reported in the old university sector have much to do with improved reporting by the Oxford University college libraries to SCOUNL.

Fig 3.5 FTE students

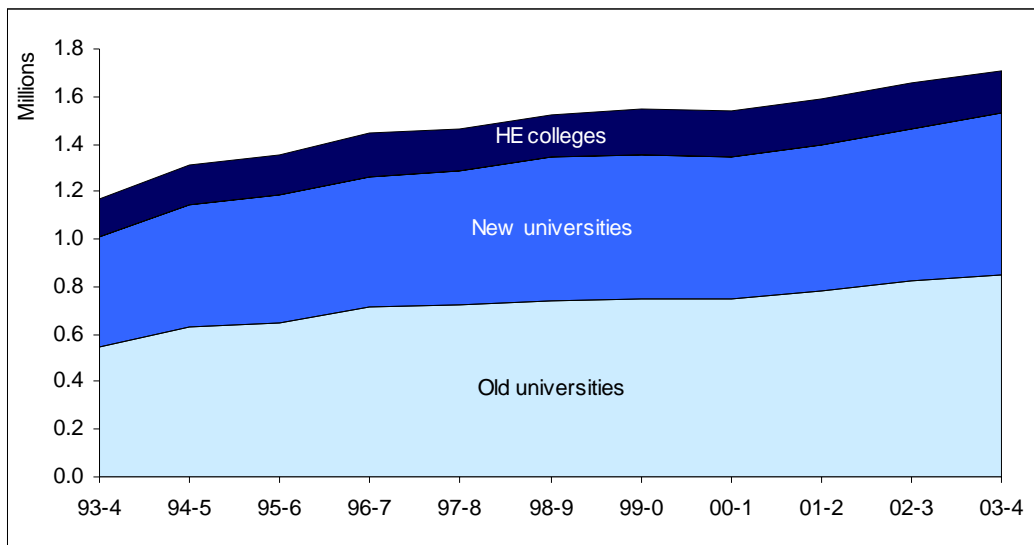


Table 3.1 FTE users ('000)

	Old universities		New universities		HE colleges		All HE sector	
	Students	Academic staff	Students	Academic staff	Students	Academic staff	Students	Academic staff
1993-94	550.3 *		456.6		159.6		1,187.6	
94-95	628.9	65.4	517.4	29.7	164.0	9.9	1,310.3	105.0
95-96	649.7	69.7	540.0	31.9	165.1	10.6	1,354.7	112.2
96-97	712.1	71.2	550.6	31.1	182.4	10.1	1,445.1	112.4
97-98	722.2	71.0	560.8	30.7	183.3	9.9	1,466.4	111.7
98-99	736.0	72.8	609.6	32.3	179.0	9.3	1,524.6	114.4
1999-2000	746.9	77.2	606.6	33.3	195.0	9.7	1,548.5	120.2
2000-01	749.7	79.3	599.3	32.9	194.4	10.0	1,543.4	122.2
01-02	785.1	81.8	614.0	33.4	186.6	10.1	1,585.7	125.3
02-03	821.1	83.9	638.8	33.7	199.6	10.1	1,659.4	127.7
03-04	851.7	81.0	677.8	34.0	177.6	8.3	1,707.1	123.2
<i>Change %</i>								
<i>Last year</i>	+3.7	-3.5	+6.1	+0.9	-11.0	-18.2	+2.9	-3.5
<i>5 year</i>	+15.7	+11.3	+11.3	+5.2	-0.8	+0.9	+12.0	+7.7
<i>10 year</i>	+55		+48		+11.3		+44	

Source: HESA

* Source: *Universities Statistical Record***Table 3.2 Number of libraries**

	Old universities		New universities		HE colleges		All HE sector	
	Institutions	Libraries	Institutions	Libraries	Institutions	Libraries	Institutions	Libraries
1993-94	75	320	42	196	67	110	184	626
94-95	75	340	42	204	65	100	182	644
95-96	72	350	42	222	66	100	180	672
96-97	72	390	42	250	63	90	177	730
97-98	69	400	42	243	63	90	174	733
98-99	67	400	42	223	60	100	169	723
1999-2000	67	450	42	218	60	110	169	778
2000-01	67	450	42	211	57	130	166	791
01-02	67	530	43	214	60	120	170	864
02-03	68	540	42	209	60	110	170	859
03-04	68	540	45	217	57	100	170	851
<i>Change %</i>								
<i>Last year</i>	0.0	0.0	+7.1	+3.8	-5.0	-9.1	0.0	-0.9
<i>5 year</i>	+1.5	+35	+7.1	-2.7	-5.0	0.0	+0.6	+17.7
<i>10 year</i>	-9.3	+69	+7.1	+10.7	-14.9	-9.1	-7.6	+36

Source: HESA/SCONUL/HCLRG

Tables 3.3 – 3.5 Expenditure and income

Table 3.3 (page 128) shows total library expenditure related to total academic services expenditure, and to total institutional expenditure. The sources of these figures vary over time: library expenditure figures are drawn from SCONUL/HCLRG returns; figures for expenditure on academic services and total institutional expenditure from 1994-95 onwards are taken from HESA, *Resources of Higher Education Institutions*. For 1993-94, data for the old universities are taken from the *Universities Statistical Record*; those for new universities from SCONUL returns, and those for HE colleges from HCLRG returns.

Academic services, including libraries, academic computing services and media services, is showing the greatest rate of growth, ahead of total institutional expenditure. Within that, however, library spending is not increasing at the same rate. Although the table shows total spending in the sector growing at a rate much faster than general inflation, measured by the retail price index, this does not take into account the increases in student numbers over the period. This is shown in Table 3.4 (page 129) for library expenditure. Looking at library expenditure per FTE student, both university sectors have increased spending by more than the rate of general inflation over the last year, and the new universities have also done better than inflation over five years. No sector has increased spending by more than inflation over ten years, although the HE colleges have almost kept pace with the Retail Price Index.

Fig 3.6 illustrates the proportions of total institutional expenditure on the library and on academic services generally, comparing this year's figure with five and ten years ago. The proportion on academic services has increased over the ten year period in all sectors, while that on libraries has changed relatively little.

Fig 3.6 Proportions of total institutional expenditure

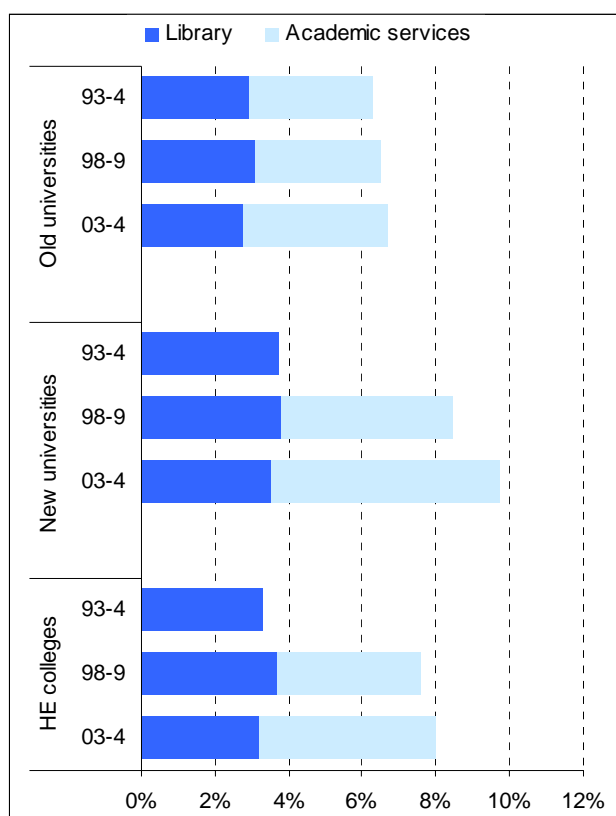


Fig 3.7 shows the breakdown of library expenditure into its four key components for each of the sectors, comparing the most recent year with the position five and ten years ago. There are some small differences between the sectors – HE colleges spend proportionately more on staff and less on information provision than universities. The proportion spent on equipment has fallen in all three sectors. The proportion spent on staff has fallen in the old universities, but increased in the HE colleges and new universities.

Table 3.5 (page 129) shows the income generated by libraries in the HE sector. The apparent increase between 1995-96 and 1996-97 for both the old and new universities was caused by a change in the SCONUL questionnaire that year. The number of categories of income for which data were required increased from six to 14, and it was immediately apparent that in many universities there were sums being shown as income in the new return which had not been included previously. Examples of such items include fees for separately funded students and use by other institutions; income from donations and bequests; research grants and other grants for specific purposes. The HCLRG return also included an item for research and other grant income in 1998-99; however this source appears to be relatively insignificant for HE colleges (or had been previously included under “other income”) as there was no significant jump in the levels of income reported. The patterns in the three sectors are again rather different in recent years.

Generated income represents a larger share of total expenditure in academic libraries than in the public library sector, at 14% overall. It is most important in the old universities, representing 17% of the total budget, compared to 10% in new universities and 8% in HE colleges (Fig 3.7). It is interesting to note that the proportion has fallen over the last five years in the new universities and HE colleges while the old universities have reported increases over both five and ten years.

Fig 3.7 Breakdown of library expenditure

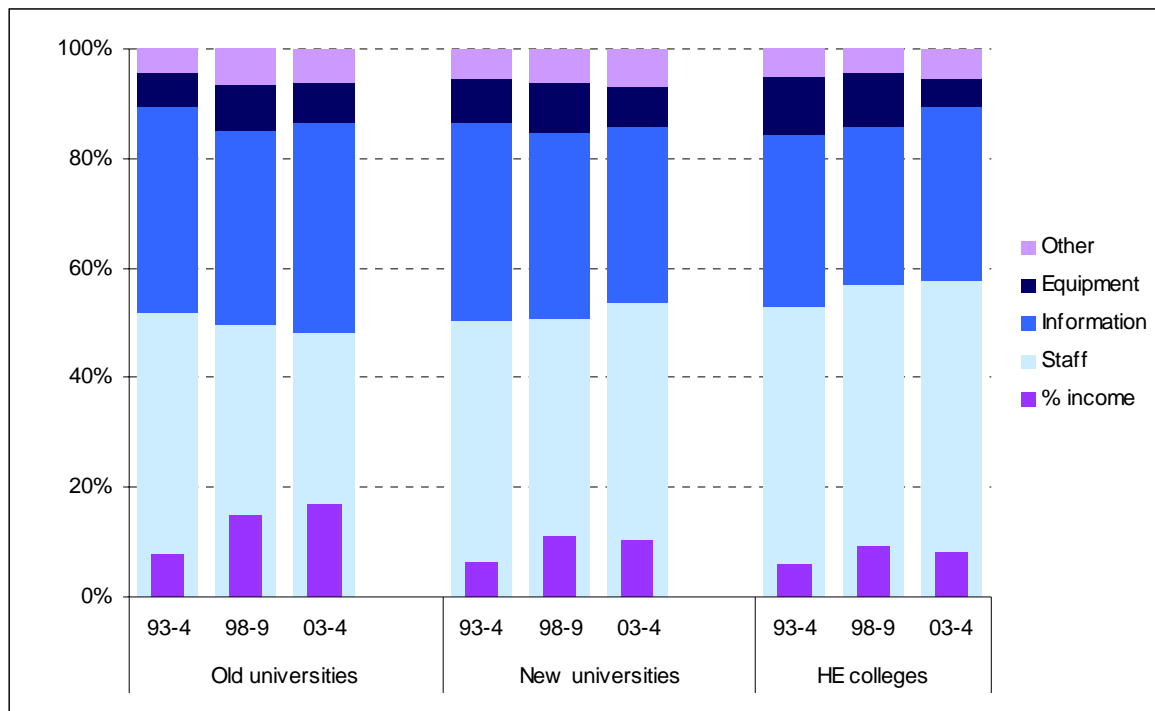


Table 3.3 Institutional expenditure (£m)

	Old universities			New universities			RPI
	Total library	Academic services	Total institutional	Total library	Academic services	Total institutional	
1993-94	167.5	357.6	5,689.1	86.5		2,309.3	142.7
94-95	184.4	396.1	6,310.6	95.6	181.6	2,566.4	147.0
95-96	201.8	434.7	6,859.3	104.3	208.2	2,789.6	151.2
96-97	218.7	441.8	6,947.7	108.7	210.4	2,922.1	155.2
97-98	229.3	462.3	7,287.5	112.6	235.6	2,980.5	160.8
98-99	241.8	508.7	7,790.2	119.0	266.5	3,154.5	164.5
1999-2000	256.4	537.9	8,368.1	121.7	291.2	3,297.7	168.1
2000-01	260.5	586.2	8,980.7	124.8	310.2	3,486.0	172.4
01-02	271.8	654.6	9,631.1	131.7	347.1	3,671.3	174.6
02-03	286.3	677.4	10,259.9	137.9	355.9	3,872.1	179.3
03-04	310.3	742.3	11,116.2	152.8	424.1	4,361.7	184.2
<i>Change %</i>							
<i>Last year</i>	+8.4	+9.6	+8.3	+10.8	+19.2	+12.6	+2.7
<i>5 year</i>	+28	+46	+43	+28	+59	+38	+12.0
<i>10 year</i>	+85	+108	+97	+77		+89	+29

Source: SCONUL/HCLRG; HESA/USR

	HE colleges			Total			RPI
	Total library	Academic services	Total institutional	Total library	Academic services	Total institutional	
1993-94	25.9		782.0	279.9		8,780.4	142.7
94-95	27.7	55.7	869.3	307.8	633.4	9,746.3	147.0
95-96	29.8	62.9	964.4	335.8	705.8	10,613.4	151.2
96-97	27.9	65.2	942.5	355.3	717.4	10,812.2	155.2
97-98	30.2	70.8	937.4	372.2	768.7	11,205.4	160.8
98-99	35.9	74.1	974.4	396.7	849.3	11,919.1	164.5
1999-2000	37.5	78.8	1,038.2	415.6	907.9	12,704.0	168.1
2000-01	38.2	86.7	1,071.0	423.5	983.1	13,537.8	172.4
01-02	38.0	94.0	1,117.5	441.5	1,095.8	14,420.0	174.6
02-03	40.9	104.5	1,213.0	465.1	1,137.8	15,345.1	179.3
03-04	36.8	91.1	1,140.9	500.0	1,257.5	16,618.8	184.2
<i>Change %</i>							
<i>Last year</i>	-9.8	-128	-5.9	+7.5	+10.5	+8.3	+2.7
<i>5 year</i>	+2.7	+23	+17.1	+26	+48	+39	+12.0
<i>10 year</i>	+42		+70	+79		+89	+29

Source: SCONUL/HCLRG; HESA/USR

Table 3.4 Total library expenditure

	Old universities		New universities		HE colleges		All HE sector	
	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student
1993-94	167,466	304	86,509	189	25,885	162	279,860	236
94-95	184,446	293	95,606	185	27,727	169	307,779	235
95-96	201,760	311	104,280	193	29,767	180	335,808	248
96-97	218,663	307	108,714	197	27,898	153	355,276	246
97-98	229,317	318	112,665	201	30,186	165	372,169	254
98-99	241,839	329	119,008	195	35,890	201	396,737	260
1999-2000	256,439	343	121,715	201	37,487	192	415,641	268
2000-01	260,522	348	124,752	208	38,221	197	423,496	274
01-02	271,778	346	131,701	215	37,983	204	441,462	278
02-03	286,282	349	137,916	216	40,860	205	465,057	280
03-04	310,296	364	152,798	225	36,846	208	500,005	293
<i>Change %</i>								
<i>Last year</i>	+8.4	+4.5	+10.8	+4.4	-9.8	+1.4	+7.5	+4.5
<i>5 year</i>	+28	+10.9	+28	+15.5	+2.7	+3.5	+26	+12.6
<i>10 year</i>	+85	+19.7	+77	+19.0	+42	+28	+79	+24

Source: SCOUNL/HCLRG

Table 3.5 Income generated

	Old universities		New universities		HE colleges		All HE sector	
	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student
1993-94	13,036	24	5,264	12	1,470	9	19,770	17
94-95	14,876	24	6,192	12	1,758	11	22,826	17
95-96	17,256	27	6,309	12	1,850	11	25,414	19
96-97	40,475	57	11,264	20	2,051	11	53,791	37
97-98	42,160	58	11,812	21	3,490	19	57,463	39
98-99	35,197	49	12,966	21	3,215	18	52,378	34
1999-2000	46,672	62	12,312	20	3,873	20	62,856	41
2000-01	48,215	64	11,987	20	2,952	15	63,154	41
01-02	50,461	64	15,373	25	2,963	16	68,798	43
02-03	47,652	58	14,125	22	2,853	14	64,630	39
03-04	51,678	61	15,746	23	2,980	17	70,442	41
<i>Change %</i>								
<i>Last year</i>	+8.4	+4.5	+11.5	+5.1	+4.5	+17.4	+9.0	+6.0
<i>5 year</i>	+43	+23	+21	+9.2	-7.3	-6.5	+35	+20
<i>10 year</i>	+296	+156	+199	+102	+103	+82	+256	+148

Source: SCOUNL/HCLRG

Change in RPI: last year + 2.7%; 5 years + 12.0%; over 10 years + 29%

Tables 3.6 – 3.8d Expenditure on information provision

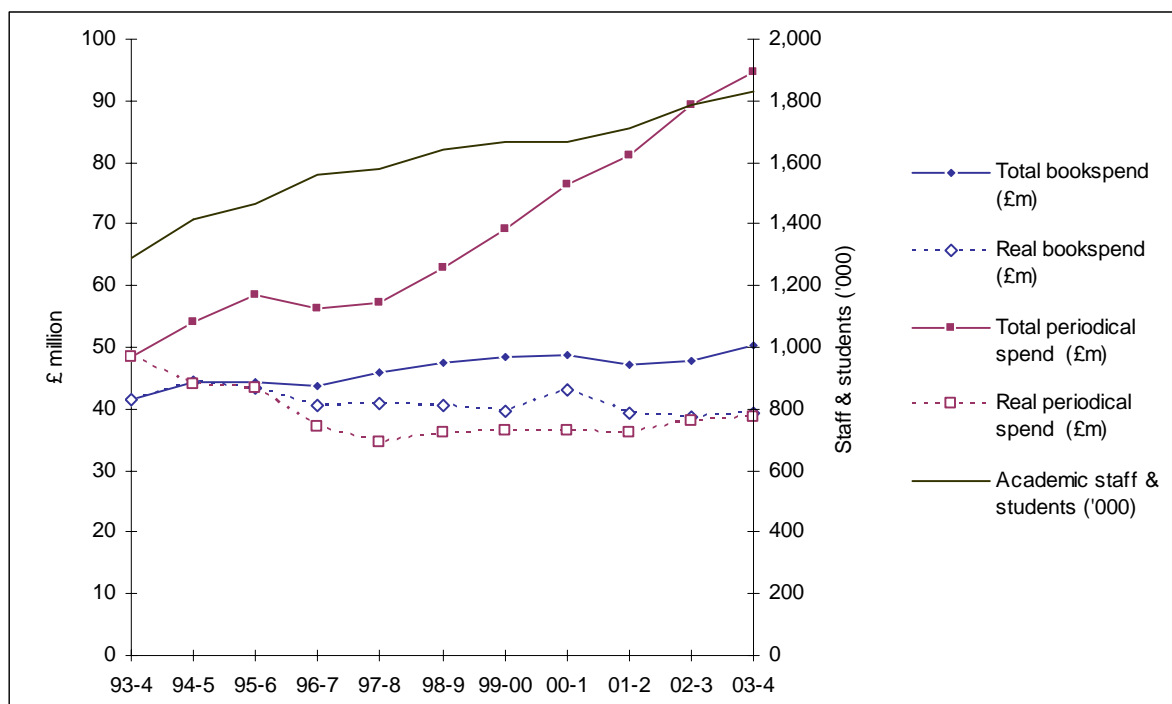
Table 3.6 (page 133) shows expenditure on information provision in total and per FTE student. Table 3.7 gives the average prices paid for books and serials, and Table 3.8 (pages 134-135) shows expenditure broken down into its component parts – books, serials, electronic resources, inter-library loans and binding.

Expenditure on information provision accounts for just over one third of total expenditure on average, and this proportion has remained relatively constant over the ten-year period. In 2003-04, £179 million was spent, £105 per FTE student. Spending per FTE student is twice as high in the old university sector than in either the new universities or HE colleges.

Increases in spending have kept pace with student numbers, but not also with inflation rates, with an overall increase of 23% in spending per FTE over ten years. The new universities have reported the smallest increase in spending per FTE at 5.6%, with the HE colleges the greatest at 30%. This has resulted in a narrowing of the gap in spending levels between these two sectors.

Fig 3.8 illustrates the trends in book and serial expenditure both in cash terms, and after adjusting for inflation measured by the relevant material price indexes. Although periodical spend has increased dramatically, almost doubling over ten years, it did not keep pace with serial price increases in the early years. Academic book price inflation has run at a rather slower rate, but the increase in book spending has also been slower, with a total increase of 21% over ten years. Fig 3.8 also shows the trends in the user base (FTE academic staff and students) for comparison.

Fig 3.8 Trends in book and periodical expenditure



Book expenditure

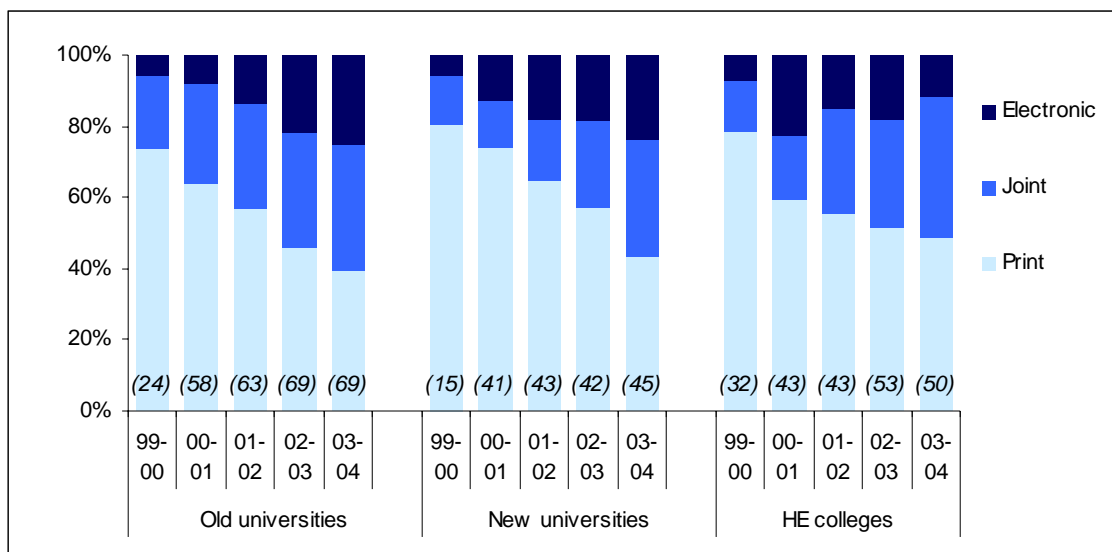
Books account for 25% of information provision expenditure in the old universities, 34% in the new universities, and 41% in HE colleges. These proportions are all falling, however, as increasing investment is made in serials and electronic resources. An average of £29.50 is spent per FTE student on books, compared to £34.93 ten years ago.

Serial subscriptions

There have been a number of changes in the way SCONUL (and HCLRG) have recorded expenditure on electronic serials over recent years. In 1996-97, these were formally classified as “electronic resources”, resulting in a dramatic increase in the proportion spent. In 1999-2000 the decision was made to classify expenditure by content rather than media. The overall effect on expenditure of returning electronic serials to the serials head at that time was not, however, marked. In the HCLRG questionnaire, explicit details of expenditure on electronic resources were sought for the first time in 1998-99. Previously this expenditure was shown under books or serials. The definitions in this area for all three sectors are now identical. As the HE colleges account for a relatively small proportion of overall expenditure, the sector totals have been given, as the main trends are unlikely to be affected by this change.

The provision and use of electronic resources is of increasing interest to academic librarians, and respondents to the SCONUL questionnaire are increasingly able to provide reliable data concerning expenditure on electronic and print serials. Data for the most recent two years are sufficiently reliable to be able to produce estimates for the sector as a whole. In 2003-04, HE libraries spent £33m on print subscriptions, £23m on electronic subscriptions, and £33m on joint format subscriptions. Fig 3.9 illustrates the pattern of spending over the most recent years, with figures for the first years based on that subset of institutions able to provide complete detail (the figures in brackets indicate the number included). It is clear that a falling proportion of the serials budget is being spent on print only titles in all three sectors.

Fig 3.9 Breakdown of serials expenditure



Figures in brackets are the number of institutions included

Electronic resources

Electronic resources other than serials, are becoming an increasingly important element of provision in academic libraries, accounting for 14% of information provision expenditure overall in 2003-04. This is now the fastest growing area of expenditure in all sectors, with increases of between 12% and 26% in the most recent year. However, defining and counting the number of such resources provided has proved problematic. Following work done at the University of Central England, SCONUL has adopted definitions for counting electronic databases received by subscription, and electronic books, also seeking detailed data on expenditure on these items. This area of the return is relatively poorly completed at present, and it is not possible to estimate the average costs of these resources, or give any further breakdown of expenditure on electronic resources, which also includes other digital documents. Relevant data will be included in this report when they are sufficiently complete and reliable.

Average cost of resources

Table 3.7 shows the average price paid for books and serials for the three sectors. There are a number of points to note:

- Items received by donation or in exchange have no associated purchase cost, but are included in the count of acquisitions, lowering the apparent average cost of materials; in particular the average cost of materials for the old universities is affected by the acquisition of items by Oxford and Cambridge universities under copyright deposit legislation.
- The average costs of both books and serials are well below the average prices at publication (*Table 5.3a, page 165 and Table 5.5, page 168*). Institutions are clearly adept at making the most of scarce resources.
- A further complicating factor in the average price paid for serials is the increasing prevalence of bundled 'deals', such as those arranged in the National Electronic Site License Initiative (NESLI). For an often nominal extra cost a large number of titles can be obtained electronically, artificially lowering the average price per title. This seems likely to be at least part of the explanation for the reduction in the average price paid, by the new universities in particular.

Table 3.6 Expenditure on information provision

	Old universities		New universities		HE colleges		All HE sector	
	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student	£'000	£ per FTE student
1993-94	62,358	113	31,183	68	8,112	51	101,653	86
94-95	67,865	108	33,461	65	9,239	56	110,564	84
95-96	72,228	111	35,541	66	9,197	56	116,967	86
96-97	76,960	108	36,709	67	8,639	47	122,308	85
97-98	80,502	111	38,303	68	8,940	49	127,745	87
98-99	85,399	116	40,482	66	10,406	58	136,287	89
1999-2000	93,942	126	41,216	68	11,709	60	146,867	95
2000-01	99,044	132	42,135	70	11,616	60	152,795	99
01-02	103,248	132	43,775	71	11,383	61	158,406	100
02-03	110,626	135	44,931	70	12,320	62	167,878	101
03-04	118,730	139	48,868	72	11,758	66	179,340	105
<i>Change %</i>								
<i>Last year</i>	+7.3	+3.5	+8.8	+2.5	-4.6	+7.3	+6.8	+3.8
<i>5 year</i>	+39	+20	+21	+8.6	+13.0	+13.9	+32	+17.5
<i>10 year</i>	+90	+23	+57	+5.6	+45	+30	+76	+23

Source: SCONUL/HCLRG

Table 3.7 Average price paid for materials (£)

	Old universities		New universities		HE colleges		All HE sector	
	Books	Serials	Books	Serials	Books	Serials	Books	Serials
1993-94	16.06	84.38	18.20	123.80	11.88	71.52	16.08	90.81
94-95	16.36	95.40	16.79	133.85	12.33	80.45	15.83	101.89
95-96	16.69	102.06	17.45	146.34	11.95	91.35	16.16	110.16
96-97	18.43	97.76	16.08	120.82	11.88	80.89	16.63	101.42
97-98	17.42	97.82	17.21	120.83	13.65	85.25	16.88	101.95
98-99	17.06	104.06	17.10	113.81	13.41	86.09	16.58	105.18
1999-2000	18.03	106.63	16.92	100.43	14.22	87.75	17.14	103.79
2000-01	17.52	97.33	17.36	84.22	13.32	77.55	16.94	92.59
01-02	14.57	88.45	17.37	75.32	14.22	67.14	15.34	83.54
02-03	16.47	88.09	18.00	66.60	14.67	54.39	16.70	79.68
03-04	17.20	94.20	18.23	56.36	16.11	69.37	17.42	81.02
<i>Change %</i>								
<i>Last year</i>	+4.5	+6.9	+1.3	-15.4	+9.9	+28	+4.3	+1.7
<i>5 year</i>	+0.8	-9.5	+6.6	-50	+20	-19.4	+5.1	-23
<i>10 year</i>	+7.1	+11.6	+0.2	-55	+36	-3.0	+8.3	-10.8

Source: SCONUL/HCLRG

Changes in price indexes: LISU academic book price index: last year + 3.1%; 5 years + 9.1%; 10 years + 28%
 Composite periodical price index: last year + 5.6%; 5 years + 36%; 10 years + 110%

Table 3.8a Breakdown of information provision expenditure

Old universities	Books		Serials		Electronic resources		ILLs		Binding	
	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total
1993-94	21,216	34.0	33,541	53.8	1,315	2.1	2,929	4.7	3,351	5.4
94-95	22,776	33.6	37,249	54.9	1,538	2.3	3,038	4.5	3,249	4.8
95-96	23,089	32.0	40,063	55.5	1,903	2.6	3,524	4.9	3,605	5.0
96-97	24,076	31.3	39,532	51.4	5,680	7.4	3,851	5.0	3,758	4.9
97-98	25,717	31.9	39,828	49.5	6,878	8.5	4,191	5.2	3,796	4.7
98-99	25,933	30.4	44,250	51.8	7,731	9.1	3,988	4.7	3,462	4.1
1999-2000	26,930	28.7	48,544	51.7	8,490	9.0	3,530	3.8	4,837	5.1
2000-01	28,167	28.4	54,157	54.7	8,419	8.5	3,406	3.4	4,887	4.9
01-02	26,676	25.8	57,323	55.5	10,988	10.6	3,382	3.3	4,877	4.7
02-03	27,434	24.8	64,202	58.0	11,383	10.3	3,098	2.8	4,510	4.1
03-04	29,054	24.5	69,440	58.5	12,785	10.8	3,093	2.6	4,417	3.7
<i>Change %</i>										
Last year	+5.9	-1.3	+8.2	+0.8	+12.3	+4.6	-0.2	-7.0	-2.1	-8.7
5 year	+12.0	-19.4	+57	+12.9	+65	+18.9	-22	-44	+28	-8.2
10 year	+37	-28					+5.6	-45	+32	-31

Source: SCOUNL/HCLRG

Table 3.8b Breakdown of information provision expenditure

New universities	Books		Serials		Electronic resources		ILLs		Binding	
	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total
1993-94	15,269	49.0	12,195	39.1	1,238	4.0	1,814	5.8	666	2.1
94-95	15,726	47.0	13,857	41.4	1,243	3.7	1,922	5.7	713	2.1
95-96	15,861	44.6	15,424	43.4	1,259	3.5	2,253	6.3	742	2.1
96-97	15,120	41.2	13,780	37.6	4,704	12.8	2,124	5.8	783	2.1
97-98	15,544	40.6	14,498	37.9	5,515	14.4	2,040	5.3	705	1.8
98-99	16,295	40.3	15,425	38.1	5,955	14.7	1,987	4.9	793	2.0
1999-2000	16,079	39.0	16,612	40.3	6,593	16.0	1,255	3.0	677	1.6
2000-01	15,847	37.6	17,988	42.7	6,340	15.0	1,413	3.4	580	1.4
01-02	15,457	35.3	19,643	44.9	6,576	15.0	1,562	3.6	537	1.2
02-03	15,136	33.7	20,427	45.5	7,506	16.7	1,421	3.2	443	1.0
03-04	16,529	33.8	20,867	42.7	9,673	19.8	1,349	2.8	449	0.9
<i>Change %</i>										
Last year	+9.2	+0.4	+2.2	-6.1	+29	+18.5	-5.1	-12.7	+1.5	-6.6
5 year	+1.4	-16.5	+35	+12.1	+63	+35	-32	-44	-43	-53
10 year	+8.3	-31					-26	-53	-33	-57

Source: SCOUNL/HCLRG

Changes in price indexes: LISU academic book price index: last year + 3.1%; 5 years + 9.1%; 10 years + 28%
 Composite periodical price index: last year + 5.6%; 5 years + 36%; 10 years + 110%

Table 3.8c Breakdown of information provision expenditure

HE colleges	Books		Serials		Electronic resources		ILLs		Binding	
	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total
1993-94	4,998	61.6	2,575	31.7	48	0.6	322	4.0	168	2.1
94-95	5,736	62.1	2,905	31.4	55	0.6	407	4.4	155	1.7
95-96	5,437	59.1	3,082	33.5	50	0.5	408	4.4	220	2.4
96-97	4,556	52.7	2,909	33.7	575	6.7	394	4.6	201	2.3
97-98	4,708	52.7	2,977	33.3	694	7.8	409	4.6	190	2.1
98-99	5,202	50.0	3,116	29.9	1,473	14.2	416	4.0	215	2.1
1999-2000	5,461	46.6	4,022	34.3	1,595	13.6	406	3.5	194	1.7
2000-01	4,863	41.9	4,365	37.6	1,789	15.4	388	3.3	210	1.8
01-02	4,953	43.5	4,266	37.5	1,598	14.0	375	3.3	190	1.7
02-03	5,196	42.2	4,548	36.9	2,033	16.5	392	3.2	204	1.7
03-04	4,773	40.6	4,232	36.0	2,260	19.2	328	2.8	166	1.4
<i>Change %</i>										
Last year	-8.1	-3.8	-7.0	-25	+11.1	+16.5	-16.4	-12.4	-18.7	-14.9
5 year	-8.2	-18.8	+36	+20	+54	+36	-21	-30	-23	-32
10 year							+1.8	-30	-0.8	-32

Source: SCOUNL/HCLRG

Table 3.8d Breakdown of information provision expenditure

Total HE sector	Books		Serials		Electronic resources		ILLs		Binding	
	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total	£'000	% of total
1993-94	41,483	40.8	48,311	47.5	2,602	2.6	5,065	5.0	4,185	4.1
94-95	44,238	40.0	54,012	48.9	2,836	2.6	5,367	4.9	4,116	3.7
95-96	44,387	37.9	58,570	50.1	3,212	2.7	6,185	5.3	4,567	3.9
96-97	43,753	35.8	56,240	46.0	10,959	9.0	6,369	5.2	4,741	3.9
97-98	45,969	36.0	57,303	44.9	13,088	10.2	6,640	5.2	4,691	3.7
98-99	47,429	34.8	62,791	46.1	15,159	11.1	6,391	4.7	4,471	3.3
1999-2000	48,471	33.0	69,177	47.1	16,679	11.4	5,191	3.5	5,708	3.9
2000-01	48,878	32.0	76,510	50.1	16,547	10.8	5,207	3.4	5,677	3.7
01-02	47,086	29.7	81,232	51.3	19,163	12.1	5,318	3.4	5,605	3.5
02-03	47,766	28.5	89,177	53.1	20,923	12.5	4,911	2.9	5,157	3.1
03-04	50,355	28.1	94,528	52.7	24,713	13.8	4,769	2.7	5,033	2.8
<i>Change %</i>										
Last year	+5.4	-1.3	+6.0	-0.8	+18.1	+10.6	-2.9	-9.1	-2.4	-8.6
5 year	+6.2	-19.3	+51	+14.4	+63	+24	-25	-43	+12.6	-14.5
10 year	+21	-31					-5.8	-47	+20	-32

Source: SCOUNL/HCLRG

Changes in price indexes: LISU academic book price index: last year + 3.1%; 5 years + 9.1%; 10 years + 28%
Composite periodical price index: last year + 5.6%; 5 years + 36%; 10 years + 110%

Tables 3.9 – 3.13 Books and serials

Books

Table 3.9 (page 138) shows the total catalogued bookstock held in academic libraries. Stocks are highest in the old universities, which include the copyright deposit collections of Oxford and Cambridge, and several other large historic collections. It is interesting to note that the HE colleges hold more books per FTE student than new universities. Table 3.10 (page 138) shows additions to bookstock. The old universities' figures include the copyright deposit items received by Oxford and Cambridge universities. Acquisitions per FTE student continue to fall in both the old universities and HE colleges, although there has been little change this year in the rate of acquisitions in the new university sector.

Fig 3.10 shows the trends in replenishment rate – acquisitions divided by total stock. The patterns and overall levels in the new universities and HE colleges are similar, with replenishment at around twice the level of the old universities. The level for old universities has changed little over time, and is influenced by the large collections held.

Book issues

Table 3.11 (page 139) shows the use made of the loan collections. In general, loans per FTE student have been increasing over the period, although the pattern in the HE colleges appears somewhat different, with loans per FTE student having fallen from a high point in 1999-2000. Loan levels are, however, similar in all three sectors.

Fig 3.11 shows stock turnover – issues per book per year. The statistics do not distinguish between lending and reference material, so the total bookstock figure has been used. While this undoubtedly leads to distortions in both the overall values and the relative positions of the sectors, the general trends should not be affected. There has been an increase only in the old university sector this year, but the trend over the ten years is generally upwards in all sectors, albeit slowly.

Fig 3.10 Stock replenishment rate

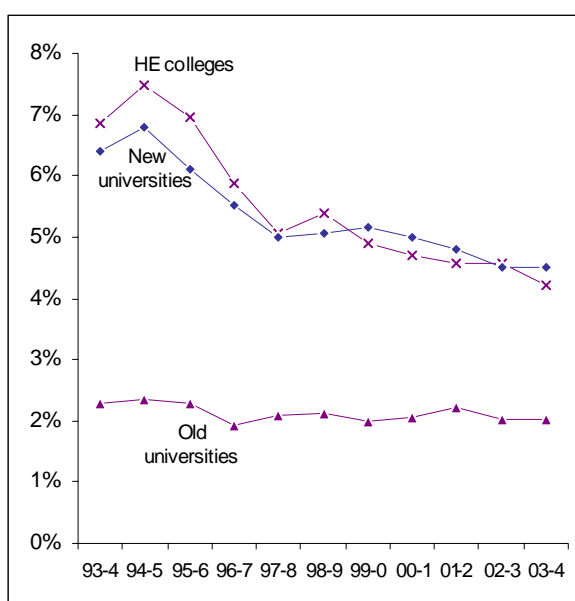
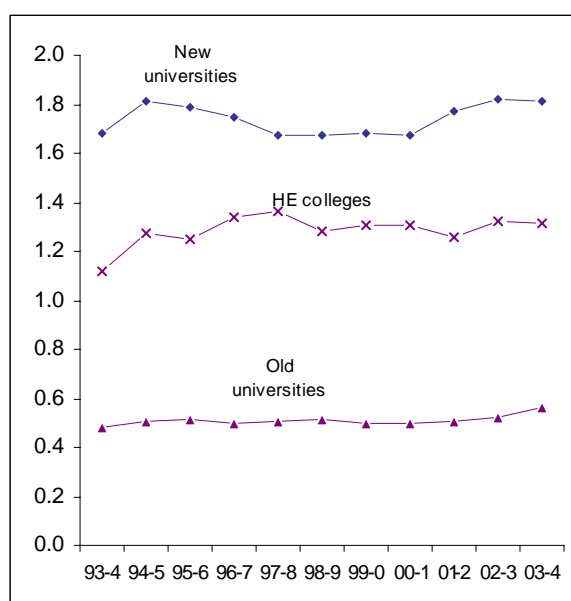


Fig 3.11 Stock turnover



Serials

The number of current serial subscriptions is shown per institution as well as per FTE student in Table 3.12 (page 139). It can be argued that the number of journals required relates more to the breadth of subjects taught and research undertaken than the number of students in each discipline. There can be no doubt that the size of the institution will have an effect on the numbers of journals purchased. However, subject mix and research activity will also play a part. It is not surprising that the old universities hold more current serial subscriptions per institution than either new universities or HE colleges. Fig 3.12 illustrates the trends in journal subscriptions per FTE student, which are complex. In both the old universities and HE colleges, the growth of recent years has been reversed in 2003-04, although serial subscriptions continue to grow in the new universities. A number of HE colleges have made substantial cuts in the number of titles purchased.

The breakdown of subscriptions between print and electronic formats is of particular interest, and an area in which SCONUL is developing its data collection. This year, an additional breakdown sought details of subscriptions held in both print and electronic formats, as well as print only and electronic only. As a result, it has not been possible this year to include a table giving details of the breakdown, which is illustrated in Fig 3.13.

Fig 3.12 Serial subscriptions per FTE student

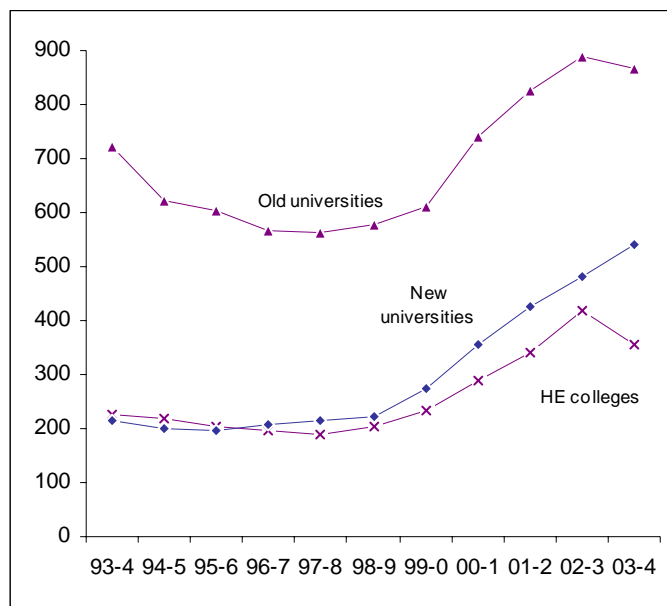


Fig 3.13 Breakdown of serial subscriptions, 2003-04

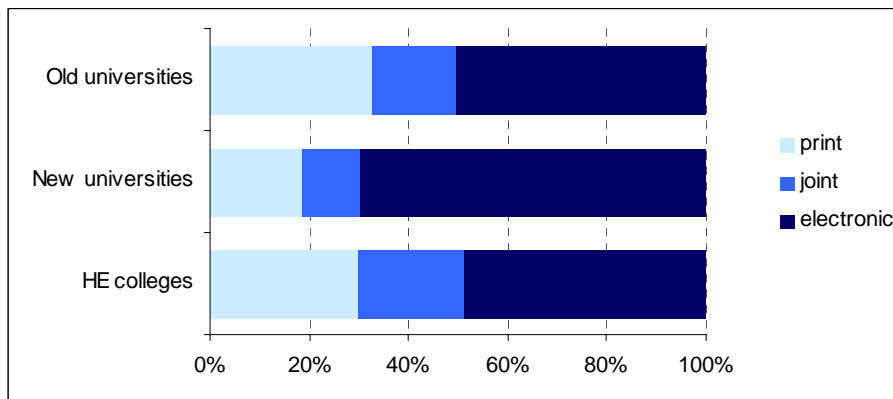


Table 3.9 Bookstock

	Old universities		New universities		HE colleges		All HE sector	
	'000	per FTE student	'000	per FTE student	'000	per FTE student	'000	per FTE student
1993-94	57,886	105	13,104	29	6,136	38	77,126	65
94-95	59,084	94	13,798	27	6,231	38	79,113	60
95-96	60,575	93	14,888	28	6,534	40	81,997	61
96-97	68,036	96	17,010	31	6,523	36	91,569	63
97-98	70,339	97	18,054	32	6,833	37	95,226	65
98-99	71,824	98	18,781	31	7,221	40	97,827	64
1999-2000	74,727	100	18,368	30	7,843	40	100,938	65
2000-01	78,223	104	18,226	30	7,791	40	104,239	68
01-02	81,909	104	18,508	30	7,631	41	108,047	68
02-03	82,032	100	18,696	29	7,744	39	108,471	65
03-04	83,668	98	20,000	30	7,092	40	110,771	65
<i>Change %</i>								
<i>Last year</i>	+2.0	-1.7	+7.0	+0.8	-8.4	+2.9	+2.1	-0.7
<i>5 year</i>	+16.5	+0.7	+6.5	-4.2	-1.8	-1.0	+13.2	+1.1
<i>10 year</i>	+45	-6.6	+53	+2.8	+15.6	+3.9	+44	-0.1

Source: SCOUNL/HCLRG

Table 3.10 Additions to bookstock

	Old universities		New universities		HE colleges		All HE sector	
	'000	per FTE student	'000	per FTE student	'000	per FTE student	'000	per FTE student
1993-94	1,321	2.4	839	1.8	421	2.6	2,580	2.2
94-95	1,393	2.2	936	1.8	465	2.8	2,794	2.1
95-96	1,383	2.1	909	1.7	455	2.8	2,747	2.0
96-97	1,306	1.8	940	1.7	384	2.1	2,630	1.8
97-98	1,476	2.0	903	1.6	345	1.9	2,724	1.9
98-99	1,520	2.1	953	1.6	388	2.2	2,861	1.9
1999-2000	1,493	2.0	950	1.6	384	2.0	2,828	1.8
2000-01	1,608	2.1	913	1.5	365	1.9	2,886	1.9
01-02	1,830	2.3	890	1.4	348	1.9	3,069	1.9
02-03	1,666	2.0	841	1.3	354	1.8	2,861	1.7
03-04	1,689	2.0	907	1.3	296	1.7	2,891	1.7
<i>Change %</i>								
<i>Last year</i>	+1.4	-2.3	+7.8	+1.6	-16.4	-6.0	+1.1	-1.8
<i>5 year</i>	+11.1	-4.0	-4.9	-14.4	-24	-23	+1.1	-9.7
<i>10 year</i>	+28	-17.4	+8.1	-27	-30	-37	+12.0	-22

Source: SCOUNL/HCLRG

Table 3.11 Issues

	Old universities		New universities		HE colleges		All HE sector	
	'000	per FTE student	'000	per FTE student	'000	per FTE student	'000	per FTE student
1993-94	28,108	51	22,069	48	6,871	43	57,047	48
94-95	30,024	48	24,954	48	7,937	48	62,915	48
95-96	31,386	48	26,569	49	8,145	49	66,100	49
96-97	33,842	48	29,747	54	8,718	48	72,307	50
97-98	35,646	49	30,179	54	9,300	51	75,125	51
98-99	36,983	50	31,458	52	9,277	52	77,718	51
1999-2000	37,507	50	30,874	51	10,238	53	78,619	51
2000-01	38,952	52	30,504	51	10,148	52	79,604	52
01-02	41,505	53	32,771	53	9,581	51	83,857	53
02-03	42,686	52	34,099	53	10,232	51	87,016	52
03-04	47,331	56	36,248	53	9,258	52	92,809	54
<i>Change %</i>								
<i>Last year</i>	+10.8	+6.8	+6.3	+0.2	-9.5	+1.7	+6.7	+3.7
<i>5 year</i>	+28	+10.5	+15.2	+3.6	-0.2	+0.6	+19.4	+6.6
<i>10 year</i>	+68	+8.7	+64	+10.7	+35	+21	+63	+13.2

Source: SCOUNL/HCLRG

Table 3.12 Current serial subscriptions

	Old universities			New universities			HE colleges			All HE sector		
	Total ('000)	per institution ('000)	per 1,000 FTE	Total ('000)	per institution ('000)	per 1,000 FTE	Total ('000)	per institution ('000)	per 1,000 FTE	Total ('000)	per institution ('000)	per 1,000 FTE
1993-94	398	5.3	722	99	2.3	216	36	0.5	226	532	2.9	448
94-95	390	5.2	621	104	2.5	200	36	0.6	220	530	2.9	405
95-96	393	5.5	604	105	2.5	195	34	0.5	204	532	3.0	392
96-97	404	5.6	568	114	2.7	207	36	0.6	197	555	3.1	384
97-98	407	5.9	564	120	2.9	214	35	0.6	190	562	3.2	383
98-99	425	6.3	578	136	3.2	222	36	0.6	202	597	3.5	392
1999-2000	455	6.8	610	165	3.9	273	46	0.8	235	667	3.9	430
2000-01	556	8.3	742	214	5.1	356	56	1.0	289	826	5.0	535
01-02	648	9.7	825	261	6.1	425	64	1.1	340	972	5.7	613
02-03	729	10.7	888	307	7.3	480	84	1.4	419	1,115	6.6	674
03-04	737	10.8	865	367	8.1	541	63	1.1	356	1,167	6.9	683
<i>Change %</i>												
<i>Last year</i>	+1.1	+1.1	-2.5	+9.5	+11.6	+12.7	-25	-21	-15.1	+4.3	+4.3	+1.3
<i>5 year</i>	+73	+71	+50	+171	+153	+143	+75	+84	+76	+95	+94	+75
<i>10 year</i>	+85	+105	+19.8	+272	+247	+151	+75	+106	+58	+119	+137	+53

Source: SCOUNL/HCLRG

Tables 3.13 and 3.14 Library Staff

Table 3.13 shows the total number of library staff employed in the sector, and the number of students per staff member. Fig 3.14 illustrates the proportion of these staff who are professional library staff – around half in HE colleges; less in universities. Although the number of staff has increased considerably over the period studied, it has not kept pace with the increases in student numbers. In the old universities, the number of students per staff member increased dramatically up to 1996-97, since when it has remained relatively stable. In the new universities, increases have been reported in each of the last three years, while in the HE colleges there has been a 12% increase over the last five years.

Table 3.14 shows total expenditure on library staff, and expenditure on library staff per FTE student. The figures for universities, drawn from SCONUL returns throughout, exclude London weighting where applicable; this accounts for less than 10% of the total staff expenditure of universities in London. Data from the HE colleges were collected in a different way, and it was not possible to exclude the costs of London weighting in most cases prior to 2000-01. It should be noted that relatively few are London based. All figures exclude the costs of temporary and casual staff.

Table 3.14 also shows average cost per staff member. Note that these figures represent the total library staff expenditure divided by total library staff, and as such include on-costs. They are not average salary figures, and will be influenced by the relative balance between professional and para-professional staff. The differences between the university sectors apparent at the start of the period covered have disappeared, although the average staff cost in HE colleges continues to be below that in the universities. This is likely to reflect the higher proportion of para-professional staff in this sector. Average staff costs have risen slightly more than wage inflation in 2003-04, but over the longer term only the new universities have increased average staff costs with inflation. The relationship between staff costs and inflation is complicated by the rate of staff turnover, and a failure to match inflation increases overall may indicate a higher staff turnover, replacing relatively costly senior staff with more junior employees.

Fig 3.14 Number of library staff (FTE)

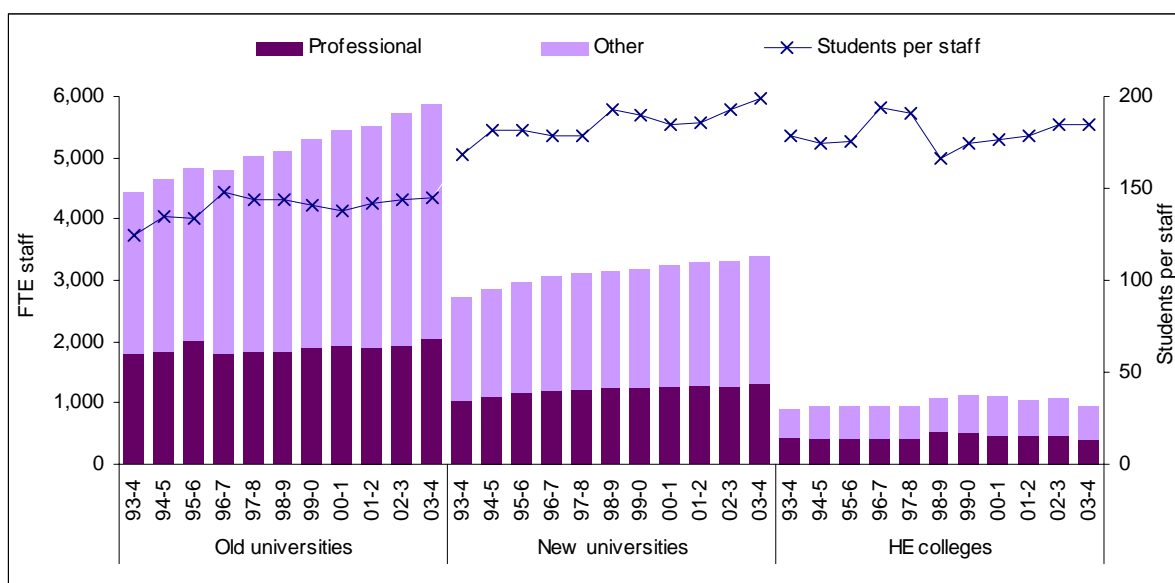


Table 3.13 Library staff numbers (FTE)

	Old universities		New universities		HE colleges		All HE sector	
	No.	Students per staff	No.	Students per staff	No.	Students per staff	No.	Students per staff
1993-94	4,450	124	2,716	168	890	179	8,056	147
94-95	4,650	135	2,842	182	940	174	8,432	155
95-96	4,840	134	2,972	182	940	176	8,752	155
96-97	4,820	148	3,069	179	940	194	8,829	164
97-98	5,020	144	3,136	179	960	191	9,116	161
98-99	5,120	144	3,163	193	1,080	166	9,363	163
1999-2000	5,290	141	3,194	190	1,120	174	9,604	161
2000-01	5,440	138	3,248	185	1,100	177	9,788	158
01-02	5,520	142	3,299	186	1,040	179	9,859	161
02-03	5,720	144	3,303	193	1,080	185	10,103	164
03-04	5,870	145	3,409	199	960	185	10,238	167
<i>Change %</i>								
<i>Last year</i>	+2.6	+1.1	+3.2	+2.8	-11.1	+0.1	+1.3	+1.5
<i>5 year</i>	+14.6	+0.9	+7.8	+3.2	-11.1	+11.6	+9.3	+2.4
<i>10 year</i>	+32	+17.3	+26	+18.3	+7.9	+3.1	+27	+13.1

Source: SCOUNL/HCLRG

Table 3.14 Expenditure on library staff (£'000 – excluding London weighting)

	Old universities			New universities			HE colleges *			All HE sector		
	£'000	£ per FTE	Average cost per staff	£'000	£ per FTE	Average cost per staff	£'000	£ per FTE	Average cost per staff	£'000	£ per FTE	Average cost per staff
1993-94	76,600	139	17,213	40,643	89	14,964	14,178	89	15,930	131,421	111	16,313
94-95	82,228	131	17,683	44,986	87	15,829	14,018	85	14,913	141,232	108	16,750
95-96	87,799	135	18,140	49,983	93	16,818	14,947	91	15,901	152,728	113	17,451
96-97	91,733	129	19,032	51,478	94	16,774	14,221	78	15,129	157,433	109	17,831
97-98	95,388	132	19,002	53,347	95	17,011	15,492	85	16,138	164,288	112	18,022
98-99	100,175	136	19,565	55,327	91	17,992	19,089	107	17,675	174,591	115	18,647
1999-2000	109,429	147	20,686	58,427	96	18,293	19,629	101	17,526	187,485	121	19,522
2000-01	110,645	148	20,339	61,129	102	18,821	19,880	102	18,073	191,654	124	19,581
01-02	115,779	147	20,974	64,915	106	19,677	19,715	106	18,957	200,410	126	20,328
02-03	122,687	149	21,449	70,574	110	21,367	21,349	107	19,768	214,610	129	21,242
03-04	132,595	156	22,589	77,235	114	22,656	19,871	112	20,699	229,716	135	22,438
<i>Change %</i>												
<i>Last year</i>	+8.1	+4.2	+5.3	+9.4	+3.1	+6.0	-6.9	+4.6	+4.7	+7.0	+4.1	+5.6
<i>5 year</i>	+32	+14.4	+15.5	+40	+26	+30	+4.1	+4.9	+17.1	+32	+17.5	+20
<i>10 year</i>	+73	+11.8	+31	+90	+28	+51	+40	+26	+30	+75	+22	+38

* includes London weighting up to 1999-2000

Source: SCOUNL/HCLRG

Change in Index of Average Earnings: last year + 4.5%; 5 years + 22%; 10 years + 50%

Tables 3.15 and 3.16 Library provision

Table 3.15 shows the number of seat hours per week available for users in academic libraries. These figures are calculated by multiplying the number of seats available in each library by the normal weekly term time opening hours of that library, then summing across all libraries. The figure will be affected by changing opening hours and changing numbers of seats available.

There have been substantial increases in this measure over the period in all sectors, although these have not kept pace with the increases in student numbers in the old universities over ten years. Both numbers of seats and opening hours have increased – Fig 3.15 shows the growth in average opening hours. The greatest increase in opening hours has been in the new universities, which are now open on average for 84 hours per week, an increase of 30% over the last ten years.

Table 3.16 shows the number of workstations available for users in the library. With the increasing emphasis on the provision and use of electronic resources, this is an important aspect of the user’s experience of library facilities. Unsurprisingly, growth has been considerable, and the number of students per workstation has fallen dramatically over the period. Fig 3.16 illustrates this growth, as the proportion of seats with workstations has increased. With increasing provision of electronic resources available to users remotely, in computer labs or at their desks, it might be thought that the rate of growth would slow but this does not appear to be the case. Some of the fluctuation in the statistics for the HE colleges in particular may be accounted for by changes in reporting practice in converged library/computing services, where nominal “ownership” of workstations may change between departments. Statistics on the provision of workstations throughout universities and HE colleges and on the estimated proportion of students with personal computers are available from the Universities and Colleges Information Systems Association (<http://www.ucisa.ac.uk>).

Fig 3.15 Average opening hours

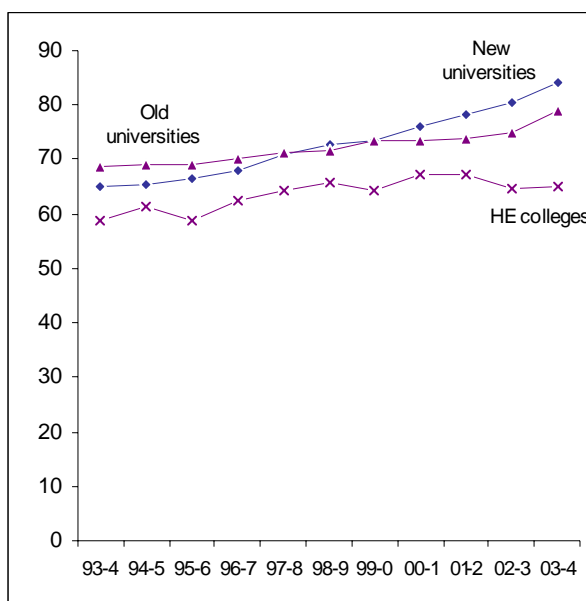


Fig 3.16 Workstations as percentage of total seats

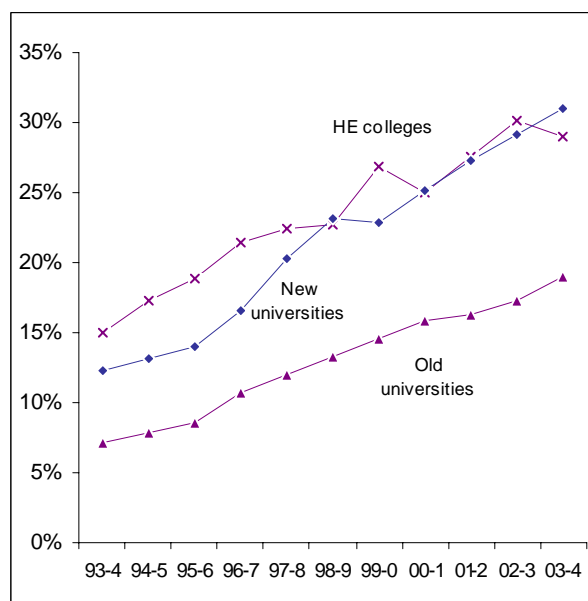


Table 3.15 Seat hours per week

	Old universities		New universities		HE colleges		All HE sector	
	'000	per FTE student	'000	per FTE student	'000	per FTE student	'000	per FTE student
1993-94	5,507	10.0	2,892	6.3	935	5.9	9,334	7.9
94-95	5,602	8.9	3,064	5.9	983	6.0	9,649	7.4
95-96	5,767	8.9	3,383	6.3	991	6.0	10,140	7.5
96-97	6,337	8.9	3,896	7.1	1,078	5.9	11,312	7.8
97-98	6,721	9.3	4,322	7.7	1,162	6.3	12,205	8.3
98-99	6,935	9.4	4,620	7.6	1,224	6.8	12,780	8.4
1999-2000	7,401	9.9	4,665	7.7	1,285	6.6	13,342	8.6
2000-01	7,266	9.7	4,649	7.8	1,226	6.3	13,140	8.5
01-02	7,530	9.6	4,833	7.9	1,160	6.2	13,524	8.5
02-03	7,620	9.3	4,910	7.7	1,147	5.7	13,677	8.2
03-04	8,022	9.4	5,248	7.7	1,102	6.2	14,371	8.4
<i>Change %</i>								
<i>Last year</i>	+5.3	+1.5	+6.9	+0.7	-3.9	+8.1	+5.1	+2.1
<i>5 year</i>	+15.7	0.0	+13.6	+2.2	-10.0	-9.2	+12.5	+0.4
<i>10 year</i>	+46	-5.9	+82	+22	+17.9	+6.0	+54	+7.1

Source: SCOUNL/HCLRG

Table 3.16 Number of workstations

	Old universities		New universities		HE colleges		All HE sector	
	No.	Students per workstation	No.	Students per workstation	No.	Students per workstation	No.	Students per workstation
1993-94	5,760	96	5,454	84	2,380	67	13,594	87
94-95	6,340	99	6,176	84	2,780	59	15,296	86
95-96	7,190	90	7,157	75	3,170	52	17,517	77
96-97	9,640	74	9,552	58	3,700	49	22,892	63
97-98	11,350	64	12,472	45	4,070	45	27,892	53
98-99	12,930	57	14,758	41	4,250	42	31,938	48
1999-2000	14,680	51	14,640	41	5,390	36	34,710	45
2000-01	15,610	48	15,488	39	4,560	43	35,658	43
01-02	16,510	48	17,001	36	4,750	39	38,261	41
02-03	17,580	47	17,935	36	5,340	37	40,855	41
03-04	18,870	45	19,094	35	4,930	36	42,881	40
<i>Change %</i>								
<i>Last year</i>	+7.3	-3.4	+6.5	-0.3	-7.7	-0.3	+5.0	-2.0
<i>5 year</i>	+46	-21	+29	-14.1	+16.0	-14.1	+34	-16.6
<i>10 year</i>	+228	-53	+250	-58	+107	-58	+215	-54

Source: SCOUNL/HCLRG

Tables 3.17 – 3.19 Library use

Book issues were considered in the section on stock in Table 3.11 (page 139). This section covers other aspects of library use, namely, visits, enquiries and inter-library loans. SCONUL has begun to collect data on the number of successful requests for full text articles and accesses to e-books, although these data are far from complete, and are not yet presented here.

Visits

Table 3.17 (page 146) shows the estimated number of physical visits made annually to library premises. Although many academic libraries have automatic visitor counters as part of their normal security arrangements, in some cases the figure is obtained from a sample count, and so may be less reliable than some of the other figures presented in this report. Readers should also be aware that for the HE colleges in particular there has been a greater than usual degree of estimation required for missing data, particularly in the earliest years.

The patterns of library visiting are rather different in the three sectors and different from those for loans. The number of visits per student is declining in the universities, although the pattern in the HE colleges is rather less consistent (Fig 3.17). One possibility for this declining use of library buildings may lie in the increasing availability of electronic resources at other locations. It seems likely that, while users who wish to use print materials continue to visit the library and borrow books, those who prefer electronic resources have less need to visit the library to obtain access. It is thus becoming ever more important to monitor the use made of electronic resources, which are taking up an increasing proportion of library budgets.

Fig 3.17 illustrates the increase in numbers of loans per visit. With fewer than one loan per visit, book borrowing is clearly not the main reason for visiting academic libraries, although little research has been published on what users actually do when they visit. Although many HE libraries survey their users on a regular basis, there is no national collation or comparison of the outcomes, and no standard methodology such as that adopted by the public libraries. A number of different instruments are used, and further information is available from SCONUL.

Enquiries

Table 3.18 (page 146) shows the trends in estimated annual enquiries in universities. These figures were not collected by HCLRG and have been poorly completed by the HE colleges since reporting to SCONUL. Enquiries per FTE student have fallen for the fourth year running. The reasons for this can only be a matter for speculation. Suggestions include changes in the layout of library buildings leading to increased user independence in being able to locate resources for themselves; increasing availability of and familiarity with electronic resources leading enquirers to look elsewhere before asking the library; and the position and staffing of enquiry desks within the library or at joint enquiry points with other services.

Inter-library loans

The final table in this section, Table 3.19 (page 147), shows the number of items obtained through inter-library loans or document delivery agencies. The higher figures for old universities are likely to be a consequence of the greater emphasis placed on research in

these institutions. Within each sector there is considerable variation, however, with some universities placing deliberate emphasis on obtaining material via inter-library loan rather than keeping extensive holdings, particularly of journal titles. Note that the majority of inter-library loan material is still obtained via BLDSC, whether as photocopies or loans of original documents.

In all sectors, both the total number of inter-library loans and the proportion of loans which are accounted for by inter-library lending and document delivery is falling. Less than 1% of loans are now accounted for by inter-library lending. While this may be indicative of an increasing ability of library collections to meet users' needs directly, it may also be related to the expansion of electronic resources. Increasing numbers of articles are now available direct to the user's desktop, from the increasing variety of journals to which academic libraries subscribe. The recent rise in open access publishing is also likely to play a part.

There is increasing availability of documents delivered directly to a researcher's desktop (with personal credit card payment). Such document delivery does not pass through the library, and is beyond the scope of these statistics. At present, the volumes of such transactions are not monitored by SCOUNL or any other agency.

Fig 3.17 Issues and visits per FTE student

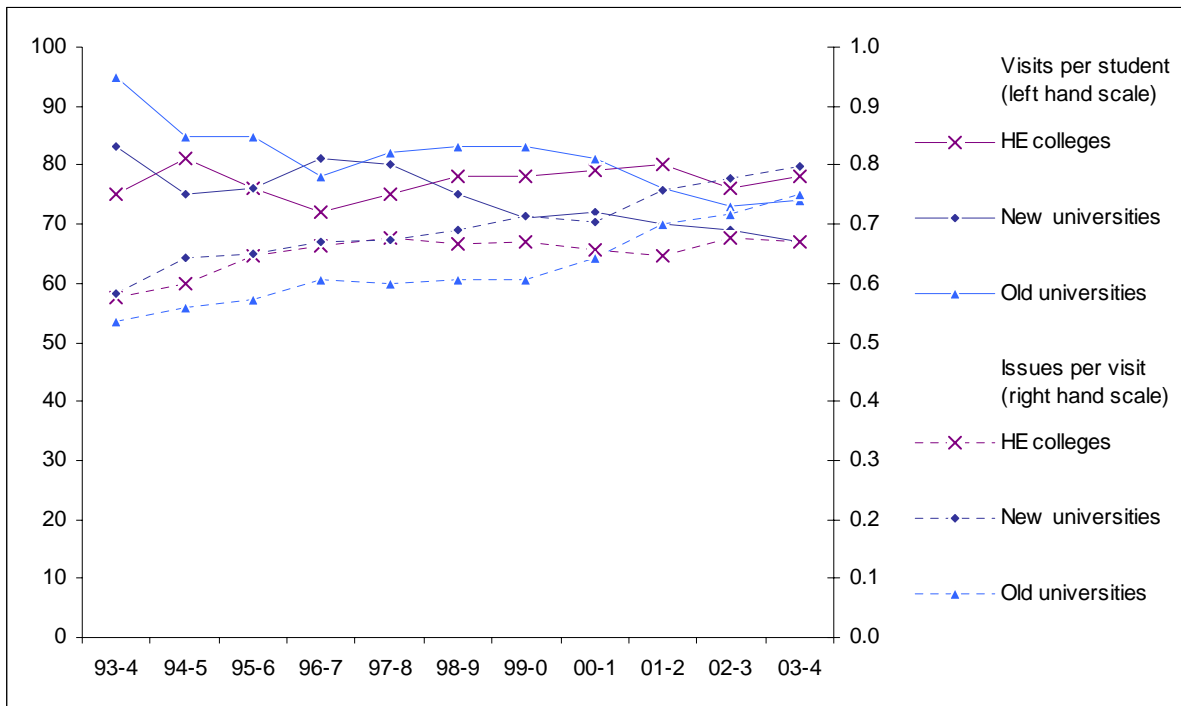


Table 3.17 Visits

	Old universities		New universities		HE colleges		All HE sector	
	'000	per FTE student	'000	per FTE student	'000	per FTE student	'000	per FTE student
1993-94	52,419	95	37,899	83	11,942	75	102,260	86
94-95	53,727	85	38,822	75	13,215	81	105,765	81
95-96	54,990	85	40,963	76	12,581	76	108,534	80
96-97	55,840	78	44,454	81	13,170	72	113,463	79
97-98	59,485	82	44,875	80	13,753	75	118,113	81
98-99	60,976	83	45,496	75	13,891	78	120,364	79
1999-2000	61,923	83	43,205	71	15,241	78	120,369	78
2000-01	60,620	81	43,247	72	15,419	79	119,286	77
01-02	59,393	76	43,232	70	14,846	80	117,472	74
02-03	59,622	73	43,838	69	15,145	76	118,605	71
03-04	63,049	74	45,363	67	13,851	78	122,246	72
<i>Change %</i>								
<i>Last year</i>	+5.7	+1.9	+3.5	-2.5	-8.5	+2.8	+3.1	+0.2
<i>5 year</i>	+3.4	-10.7	-0.3	-10.3	-0.3	+0.5	+1.6	-9.3
<i>10 year</i>	+20	-22	+19.7	-19.4	+16.0	+4.3	+19.5	-16.8

Source: SCONUL/HCLRG

Table 3.18 Estimated annual enquiries

	Old universities		New universities	
	'000	per FTE student	'000	per FTE student
1993-94	4,834	8.8	4,971	10.9
94-95	5,654	9.0	4,972	9.6
95-96	6,322	9.7	5,163	9.6
96-97	7,145	10.0	5,531	10.0
97-98	7,906	10.9	5,307	9.5
98-99	8,198	11.1	5,118	8.4
1999-2000	8,585	11.5	5,313	8.8
2000-01	8,028	10.7	4,467	7.5
01-02	7,819	10.0	4,281	7.0
02-03	7,317	8.9	4,361	6.8
03-04	6,699	7.9	4,211	6.2
<i>Change %</i>				
<i>Last year</i>	-8.5	-11.7	-3.4	-9.0
<i>5 year</i>	-18.3	-29	-17.7	-26
<i>10 year</i>	+39	-10.5	-15.3	-43

This measure was not collected by HCLRG – see commentary
Source: SCONUL

Table 3.19 Inter-library loans

	Old universities		New universities		HE colleges		All HE sector	
	'000	% of all loans	'000	% of all loans	'000	% of all loans	'000	% of all loans
1993-94	695	2.5	427	1.9	90	1.3	1,213	2.1
94-95	792	2.6	445	1.8	98	1.2	1,335	2.1
95-96	827	2.6	504	1.9	96	1.2	1,426	2.2
96-97	800	2.4	490	1.6	84	1.0	1,374	1.9
97-98	808	2.3	449	1.5	84	0.9	1,341	1.8
98-99	808	2.2	441	1.4	86	0.9	1,335	1.7
1999-2000	785	2.1	402	1.3	94	0.9	1,281	1.6
2000-01	685	1.8	354	1.2	96	0.9	1,135	1.4
01-02	633	1.5	335	1.0	87	0.9	1,055	1.3
02-03	565	1.3	293	0.9	85	0.8	943	1.1
03-04	513	1.1	274	0.8	76	0.8	862	0.9
<i>Change %</i>								
<i>Last year</i>	-9.2	-18.1	-6.6	-12.2	-10.2	-0.7	-8.5	-14.2
<i>5 year</i>	-37	-30	-38	-46	-11.8	-11.6	-35	-46
<i>10 year</i>	-26	-56	-36	-61	-15.8	-38	-29	-56

Source: SCONUL/HCLRG