Section 1 Introduction and Executive Summary

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 2002-03, 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.

Sector coverage

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. Also in this section this year is a selection of data from the most recent CILIP survey of libraries in further education colleges.
Section 1: INTRODUCTION and EXECUTIVE SUMMARY

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. This year, there is an analysis of the effect of the BBC Big Read campaign on library issues and book sales.

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 statistics 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 COUNTER\(^1\) 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 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.

\(^1\) www.projectcounter.org/ [accessed 1/12/04]
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 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
Executive Summary

*LISU Annual Library Statistics 2004* is the 18th in the series, and includes data on:

- Public libraries in the UK from 1992-93 to 2002-03
- Libraries in institutions of Higher Education in the UK, from 1992-93 to 2002-03
- Government Departmental libraries from 1992-93 to 2002-03
- The British Library from 1992-93 to 2002-03 and the National Libraries of Wales and Scotland for 2002-03
- Libraries in colleges of Further Education for 2003

A range of associated data of relevance to library and information service managers is also shown. Key results from the main sectors are as follows.

**Public Libraries**

Public libraries in the UK spent over £1 billion in 2002-03 – an increase of 8.5% over the previous year. This is the largest increase recorded in the ten-year period covered by this report. After adjustment for inflation and the increase in population, real expenditure per capita has increased by 4.1% to £17.15 – its highest level since 1993-94, continuing the upward trend apparent in the last three years.

This increase in expenditure has been largely in the areas of central establishment charges and computing costs. The proportions of expenditure on staff, premises, and, most significantly, books and other materials for public use, have all fallen over the last five years.

Staff expenditure was a total of £536 million in 2002-03, 53% of the total. The average cost of employing a member of staff ranges from £18,670 in Wales to £24,083 in London, and has kept pace with the rise in the index of average earnings over the last ten years.

Expenditure on books and other materials for public use represented just under 13% of total expenditure in 2002-03, having fallen from over 17% ten years ago. Book expenditure was £94 million in 2002-03, and accounted for just over 9% of total expenditure. Per head of population, book expenditure increased by 4.8% in the year, to £1.59. Expenditure on audio-visual materials continues to rise, by over 10% in the last year, to £18.7 million, equivalent to 32p per head of population. Relative expenditure is highest in London, and lowest in Wales, despite a significant increase in the most recent year. £3.9 million was spent on electronic resources in 2002-03, 6.6p per person.

The average price paid for books was £7.79 in 2002-03, a fall of 3.6% over the previous year. This compares to the average price paid for consumer books, published in *The Bookseller*, of £7.25 over the same period. The average price paid for audio materials, including both music recordings and talking books, increased by 3.4% to £13.94, while the average price paid for video materials fell to £9.93 – the lowest level reported in the period covered by this report.

Total income has increased significantly this year, by over 30%. In real terms, adjusting for inflation, income per head of population has increased for the third consecutive year, to £2.34. This is a 26% increase over the last year, and is largely due to a significant increase in grants received, to a total of £47.8 million.

Income generated from fines and fees has fallen in importance, and at 33p per capita has not kept pace with inflation over the period. Reasons for this must be a matter for speculation, but declining rates of library use may be playing a part. More significant is the income generated from hire of audio-visual...
materials, now at £24.5 million for the UK as a whole, up by 6.5% over last year. This is equivalent to 41p per head of population, and has risen year-on-year throughout the period covered by this report.

Public libraries have over 114 million books in stock, 73% of which are for lending, and 27% for reference, or in reserve. Stock levels have fallen in every year since 1996, and there are less than two books in stock per head of population in the English counties and unitary authorities. Provision is highest in Scotland, at 2.6 books per person. The balance of lending stock is moving towards books for children, with 35% being adult fiction, 36% adult non-fiction and 29% for children at 31 March 2003.

Twelve million new books were acquired in 2002-03, an increase of 8.5% over last year, but less than the 12.7 million acquired ten years ago. The general trend in acquisitions has been upwards over the last five years, and is likely to be connected with the introduction of public library standards in this area. The levels of additions in England and Wales were 201 and 186 per thousand population, respectively, compared to a standard of 216.

In total, 5.4 million audio items are held, including both music and talking books. This is equivalent to 91 items per thousand population, and is a slight fall from last year. Provision of video materials has increased, to 2.2 million overall or 37 per thousand population. CD-ROMs are now available in all but 12 of the UK’s public library authorities, with total stocks at 289,000, five per thousand population. The rate of acquisitions continues to increase, with over 1.6 million items acquired in 2002-03, up by one third over the position ten years ago.

The decline in book issues continues. In 2002-03 361 million books were issued, a fall of 4.2%, and equivalent to 6.1 per head of population. Around half were adult fiction, and a quarter each non-fiction and children’s. Children’s lending has fallen for the sixth consecutive year, although the rate of decline is rather slower than for adult materials. Increasing provision of audio-visual and other new media has not made up for the decline in use of books. While issues are increasing for videos, this is not the case for audio materials. In 2002-03 41 million audio-visual items were issued, 0.7 per head of population, an increase of just 1.6% over last year.

In contrast to issues, the number of visits made to public libraries in 2002-03 increased, by 1.5%, to 323 million, equivalent to 5.5 per head of population. The greatest increases were in Wales and Northern Ireland, while visits in the English counties fell slightly overall. The number of enquiries received fell slightly in 2002-03 to just under 58 million, while the number of requests made increased to just under eight million.

UK public libraries employed a total of 26,359 staff at 31 March 2003, an increase of 2.2% over the previous year, and one staff member for every 2,250 population. Twenty-three per cent were classed as professional staff.

The total number of branch and mobile libraries open for 10 hours or more per week has increased, albeit by only 0.2%, to 4,624. This is the second consecutive increase, and an encouraging sign. More encouraging is the increase in opening hours – 54 libraries in the UK are open for 60 hours or more a week, and 845 open between 45 and 59 hours. These figures are the highest recorded during the ten-year period of this report. As a result, the total service point hours available per week has increased to 2.45 per thousand population, its highest level since 1996-97.

The CIPFA public library user survey results for 2003 show that adult users are predominantly female, and getting older – 49% are aged 55 or over. Borrowing books
remains the most popular activity, with 73% of visitors borrowing and/or returning books during their visit. Browsing and seeking information are declining in popularity, while for the first time, more visitors used the internet than read newspapers. More than half of all users who were seeking a book found one, and over 70% found information they were looking for. Ninety-three per cent of users rate their services as “good” or “very good” overall, with staff helpfulness, knowledge and expertise the most highly rated aspects.

Overall, the picture for UK public libraries is more encouraging than has been the case for some years. There are signs that the decline in provision may be over, with increases in spending, book acquisition, staffing and opening hours in 2002-03. Levels of use, particularly borrowing, have yet to reflect this increased investment.

**Academic libraries**

In 2002-03, two new universities merged, one University of London Institute reported separately for the first time, and there were a number of changes within the HE college sector, resulting in no change to the overall number of HE institutions in the UK. The number of FTE students rose by 4.6%, and the number of FTE academic staff by 1.9%, giving a total user base of some 1.8 million.

Total library expenditure per FTE student rose by 0.7% to £281. 36% of this, £101 per FTE student, was spent on information resources, with 46% (£130 per FE student) on library staff. Old universities have the highest spending per FTE student, at £389, with new universities and HE colleges spending £218 and £205 per student respectively in 2002-03.

The greatest part of information provision expenditure is on serials in the university sectors, at 58% in the old universities, and 46% in the new. HE colleges continue to spend proportionately more on books – 42% of the total. Both the new universities and HE colleges have increased their spending on electronic resources substantially, to over 16% of the total in both cases. In the old universities the figure is little changed from last year, at 10% of the total.

On average, there are 65 books per FTE student in the sector as a whole, down 4% from last year. There have been falls in the number of books acquired per FTE student in all three sectors, with falls in the total number of books acquired in both university sectors. For the first time, there has been a fall, albeit of less than 1%, in the number of loans per FTE student, to 52. There is little difference between the three sectors in this figure.

In contrast, the number of serial subscriptions continues to increase, by 9.7% overall. The greatest increase is in the HE college sector, with an overall increase of 32% in 2002-03. This year, for the first time, there is reliable evidence of the move to electronic formats, with all sectors increasing their electronic subscriptions, and decreasing print. Overall, 60% of titles are held electronically, compared to 53% last year.

Over 10,000 library staff were employed in HE libraries at the end of July 2003, an increase of 2.5% over the previous year. On average there were 164 FTE students for each staff member, with the ratio highest in the new universities (191 students per staff member) and lowest in the old (144). Total staff expenditure was £215m, an increase of 7.2% over the previous year.

Opening hours and seat availability continue to increase, but not sufficiently to keep pace with student numbers. There were an average of 8.3 seat hours per week per FTE student in 2002-03. The number of workstations available is increasing in line with student numbers, with a total of nearly 41,000 in the sector as a whole, one for every 41 FTE students.
The number of visits to library premises has increased to over 118 million in 2002-03, but the number per FTE student continues to fall, to 71. It seems likely that this can be attributed to the availability of electronic resources at locations remote from the library. The number of enquiries per FTE student is falling, although total enquiries are up by almost 2% in the new university sector. Inter-library lending activity continues to fall, and is now below 1% of all loans in both the new universities and HE colleges.

**Government department libraries**

Data were supplied by a total of 25 libraries, but not all were able to give all of the information sought. The 25 libraries employed a total of 531 staff, and based on those able to provide a split, around 60% were professional staff. These staff serve a total of nearly 305,000 potential users. A wide range of services are available to users, including user training (22 libraries), copyright advice (18 libraries), public enquiry lines (11 libraries) and translations (8 libraries).

Twenty-three libraries spent a total of £7.8m on information resources, and 21 libraries catalogued over 106,000 items. Nineteen libraries made 98,000 internal loans to users, while 20 libraries recorded almost 30,000 incoming ILL. Twenty-two libraries answered over 280,000 enquiries during the year; based on those able to provide a split, three quarters of these were classed as ‘short’.

**National libraries**

Total resources available to the British Library in 2002-03 were £119 million. Of this, 11.4% was spent on acquisitions, with 48% on staff. There were 2,418 staff employed at 31 March 2003, with 10.8 million monograph and serial volumes held in London, an increase of 3.0% over the previous year. Holdings of all other items have also increased, with the greatest rise of 13% in the number of videograms, albeit from a low base. Use has fallen, however, with a drop of 5.5% in the number of reader visits, and a drop of 3.9% in the number of items supplied remotely and supplied or consulted in the reading rooms.

Satisfaction with staff continues to increase, with 94% of users rating them as ‘excellent’ or ‘good’. 78% of users were ‘satisfied’ or ‘very satisfied’ with the range and depth of the collections, while the least satisfactory aspect was the copying / photographic services, with 35% of users ‘dissatisfied’ or ‘totally dissatisfied’.

The National Library of Wales estimates its holdings at 3.7 million bound monographs and 1.5 million bound volumes of periodicals, although most periodicals are boxed rather than bound. It had some 82,000 visits, and over 75,000 issue slips were made out. Over 6,500 postal enquiries were received.

The National Library of Scotland acquired over 314,000 items in 2002-03, slightly more than last year (excluding the acquisition of over 300,000 OS digital maps in 2001-02). Fewer periodical parts and microforms were acquired, but there were more acquisitions of monographs, newspapers, music, maps and new media. Other than microforms, only a minority of these acquisitions were purchased, at a cost of over £800,000. Use has increased, with nearly 55,000 visits and over 208,000 items issued in the main reading room. Over 46,000 items were issued in the Map library, nearly 17,000 in the manuscripts reading room and 12,000 in the rare books reading room.

**FE college libraries**

In 2003, CILIP carried out its fourth survey of libraries in colleges of further education throughout the UK. It is not possible to report any global estimates of the range and breadth of provision, due to the way in which the data
have been presented. No data were collected on library use.

Almost all libraries provide basic lending and reservation services, introductory sessions and enquiry services. 87% provide online searching, 76% have on-going information literacy sessions, and interlibrary lending. 35% give support for the college virtual learning environment development, and 32% provide specific support for distance learning students.

Budget figures for the library exclude staff costs, with the proportion of the overall college budget (including staff) allocated to the library ranging from 0.04% to 3.97%. Over 90% of FE college libraries spend three-quarters or more of their non-staff budget on print resources. Staff numbers range from two to 48 overall, with some colleges not employing any qualified librarians.

**General statistics**

Average academic book prices in the UK have increased by 17.6% over the last ten years, to £41.62 in 2003. This compares with an increase in the general Retail Price Index of 28.9% over the same period. Prices for US academic books have risen more sharply, however, by 49.3%. Combining UK and US sources, and taking changes in the exchange rate into account, the overall increase in the academic book price index is 22.8%.

Average periodical prices in Great Britain in 2004 vary from £89.14 in the humanities to £703.49 in science, with an average over all subjects of £423.06. This is up 6.9% over the previous year, with subject based increases ranging from 1.7% in social sciences to 34.6% in humanities. Over 175,000 serial titles were published in 2003, with almost 40,000 available on line.

In 2003 130,000 books were published in the UK. There is at present no UK index of general book prices. The average price paid for consumer books in 2003 was £7.40, a figure which has remained relatively stable over the four years for which it is available. The sales volume on which this is based has increased year on year, and is now over 130 million units. The total size of the market for books is around twice this, at 286 million units, an increase of 4.8% over the previous year, having a value of £2,172 million, up 8.5% on the previous year.

The Public Lending Right scheme had over 36,000 authors registered in 2002-03, and attracted £7.2m Government Funding. Almost half the authors registered received no payment in the year, with another third receiving less than £100 each. The most popular adult non-fiction genre borrowed from public libraries in 2002-03 was “family, home & practical interests”, closely followed by “sport, travel & leisure interests”. The most borrowed non-fiction title was a biography, however – *The Lost Boy*, by Dave Pelzer. The most borrowed contemporary children’s fiction author was Jacqueline Wilson, responsible for 16 out of the top 20 most frequently borrowed children’s fiction titles (the remaining four places went to J K Rowling).

The BBC Big Read campaign reached a conclusion, with *The Lord of the Rings* being voted the nation’s favourite novel. The campaign had a positive effect on public library issues for the books included, with 82 of the top 100 titles showing an increase in the second half of 2003 over the same period the previous year. There was also a positive effect on book sales, with 17 of the top 21 Big Read titles reporting increased sales between 2002 and 2003.