

Section 1 Introduction

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

This annual volume summarises key statistics for a wide range of library and information work in the UK. The base year for which most data are given is 2004-05, and wherever possible trends are analysed over the past ten years. The aim is to give as comprehensive a picture as possible of activity in libraries in the UK, by presenting sector-wide totals as well as a range of derived ratios. The commentary in each section draws attention to the major changes and trends, and highlights any unusual circumstances affecting the data. The publication is intended to provide information that is useful and interesting for library managers at all levels of their organisations. It is also a reference source for several groups of professionals from outside the library and information world, including politicians, journalists, academics, researchers and the book trade.

The Library and Information Environment

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

- The population of the UK has increased by 2.5% over the last ten years, to 59.9 million
- The retail price index shows inflation running at 2.8% in 2005. Over five years the increase has been 13%, and over ten years, 29%
- The average consumer price paid for books in 2005 was £7.56, up 2.7% on the previous year
- The average price of academic books in 2005 was £45.74, up 8.3% on the previous year. Over five years the increase has been 23%, and over ten years, 37%
- The average price of an academic journal in the UK in 2005 was £465, up 9.8% on the previous year. A further 5.2% increase in 2006 took the average price to £489
- Over 180,000 serial titles were published in 2005, of which 45,000 were available online
- There were 9,900 chartered librarians working in all sectors in the UK in 2004-05, but this is a fall of 17% over the last five years

Summary of Key Findings

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

Public Libraries

Both actual library expenditure and expenditure per head of population have increased for the seventh consecutive year, after adjustment for inflation, to £1,097m, £18.32 per person, for the UK as a whole in 2004-05. This is clearly encouraging, and demonstrates a continuing commitment to public libraries, after a period of decline between 1993 and 1998, when spending did not keep pace with inflation. More than half of total expenditure is on staff – 55%. Premises costs account for just under 11%, and central establishment costs 10%, with books accounting for under 9%. Overall, materials for public use – including audio-visual material, newspapers and other acquisitions – represent 12% of total spending, £2.26 per person.

The greatest increases in total expenditure per capita over the last year have been in Wales, Scotland and the English counties, each with increases of more than 4%. The smallest increase was in London, at 1.5%, although London, on average, continues to have the highest spend per capita at £24.90. Spending fell in Northern Ireland; this is not surprising, as last year's figure was unusually high there.

Generated income accounts for 10% of total expenditure, at £109m in 2004-05. This is 2.4% lower than last year, but up by 81% over the last ten years, and equivalent to £1.82 per head of population. The hire of audio-visual materials and use of electronic resources generated 46p per person, with fines and fees raising 32p per person in 2004-05. Although no data are collected on the number of overdue items, the number of requested items (for which there is often a fee payable) has increased in each of the last five years, to over nine million (for the UK as a whole) in 2004-05.

Over £602m was spent on library staff in 2004-05, £10.06 per head of population, and almost £23,000 per staff member. Increases in staff costs have generally kept pace with increases in the Index of Average Earnings, with an increase of 5.5% overall this year. London continues to have the highest staff costs per head of population, followed by Scotland. There has been a slight increase in the number of staff in post in 2004-05, to almost 26,600 in total. 23% of these were in professional posts, compared to 26% ten years ago.

Over £95m was spent on books in 2004-05, with £23m on audio-visual materials and £6m on electronic resources. This is equivalent to £1.59 per head of population on books, down by 1.2% over last year, with a further 39p per person on audio-visual items (up 5.2%) and 10p per person on electronic resources. Spending on electronic resources is the fastest growing area of library expenditure, as might be expected for a relatively new area of activity, with increases of 21% over the last year, and 84% over five years in spending per capita.

There has been a further fall in total bookstock, to 108m for the UK in total, of which 74% were items for lending and the remainder for reference or in reserve. This is an average of 1.8 per head of population, compared to 2.2 per person ten years ago. Scotland and Northern Ireland have the highest stock levels at 2.5 and 2.4 books per person respectively; within England the highest stock level on average is in London, at

2.0 books per person. The proportion of children's books has been increasing, and is now 30% of the total. Just over 12m books were added to stock in 2004-05, representing 11.2% of the total. This represents a further increase in the replenishment rate, although it is still some way short of the level set in the Public Library Service Standards (PLSS) for England, of 14.9%. The PLSS also set standards for acquisitions per head of population; 34% of English authorities met the standard this year. The decline in book issues, particularly those of adult fiction materials, continues. There are some encouraging signs this year, however, with an increase of 2.1% in children's issues for the UK as a whole – the first reported increase since 1996-97. Issues have also risen in Northern Ireland – by 6.6% – where lending stock has increased by 11.9%.

In contrast, stocks of audio-visual materials and CD-ROMs continue to rise overall, albeit slowly. Audio stock – talking books and music – is declining, while video stocks have increased year on year throughout the period covered. CD-ROM stock is now offered by 205 of the 208 public library authorities in the UK, with a total stock of around 321,000 items. Acquisitions overall are little changed from last year, with a total of 1.7m items being acquired in 2004-05, giving a replenishment rate of 19.7%. Audio-visual issues have fallen by 4.2% over the last year, with all types of material falling in popularity except CD-ROMs, which show an increase of 7% in issues over the last year, to 26 per 1,000 population.

The number of visits to public libraries has increased for the third consecutive year, and is now 2.5% higher than five years ago. Almost 340 million visits were made to library premises in 2004-05, 5.7 per head of population. Early results from the DCMS sponsored *Taking Part* survey for 2004-05 suggest that 48% of the adult population visited a library in the year before the survey. Data from the CIPFA PLUS surveys show that it is the IT facilities now available which are drawing visitors, with the proportion of library visitors who used a computer or the internet having more than doubled between 2001, when data were first collected, and 2004, the latest year for which statistics were available at the time of writing. There have also been significant increases in the proportions of visitors borrowing CDs, DVDs and CD-ROMs this year.

There has been a fall in the total number of service points in the UK, to 4,715. The greatest fall, of 8%, has been in the number of mobile libraries, with only a small decline overall in the number of static branches. There has been a slight increase in overall weekly opening hours in 2004-05, however, despite falls in Scotland and Northern Ireland. The number of service points open for more than 45 hours per week has increased by 3.8%. The effect of the public library service standards can be seen in England and Wales, with 69 service points in England open for 60 or more hours per week (up from 51 last year) and five in Wales. ICT provision in public libraries continues to grow, with a total of 36,509 computer terminals with library catalogue and internet access available in 4,426 libraries, 97% of the total.

Higher Education Libraries

The overall picture for libraries in institutions of higher education continues to be a positive one, with resources generally increasing in line with student numbers, if not also with inflation. There are wide variations within the sector, however. Library use is also increasing overall, and steps are being taken to monitor use of electronic resources and develop appropriate performance indicators in this area.

In 2004-05, the Higher Education Statistics Agency (HESA) changed the way in which it collected data on the numbers of students in higher education (HE) in the UK. This has led to an apparent fall in the total numbers reported; however, on a like-for-like basis, the number of FTE students has increased by 1.4% this year, to 1.68 million. All percentage changes quoted below and in Section 3 take account of this change in definition. The number of academic staff has also increased, by 7.9% to 133,000 FTE.

There have been further mergers within the sector, and some institutions have changed their status. Overall, there are 167 institutions included in these statistics, operating a total of 846 libraries – down 1.3% over last year. Service availability, in terms of both study places and opening hours, has increased over the last ten years in the sector as a whole, to give an average of 8.9 study place hours per week per FTE student in 2004-05. One quarter of all study places now have computer workstations, compared to one in ten, ten years ago.

Overall, library expenditure increased by 4.1% last year, to £520 million. This is equivalent to £310 per FTE student. Library spending per FTE student has not kept pace with the rate of general inflation, having increased 2.7% over the last year, and 10.9% over five years, compared to increases in the Retail Price Index of 3.2% and 13.0% respectively. A total of 14% of total expenditure is funded by generated income.

£242 million was spent on staff in 2004-05, £144 per FTE student. Average staff costs have kept pace with increases in the Index of Average Earnings over recent years. Altogether, 10,254 library staff FTE are employed in the sector, of which 37% are professionally qualified. There is an average of 164 FTE students per FTE library staff member, an increase of 1.2% over last year.

Information provision represents 35% of total spending, £183 million in 2004-05, up 2.2% on the previous year. Taking account of the changes in student numbers, however, the increase was less than 1%, to £109 per FTE student. The greatest proportion continues to be spent on serials, including electronic serials, at £57 per FTE student. In contrast, £30 was spent on books, and £16 on other electronic resources, per FTE student in 2004-05.

The total book stock in academic libraries continues to increase, by 1.4% in the last year to 113 million volumes, or 67 per FTE student. Acquisitions are falling, however, with 2.6 million new books acquired in 2004-05, down 9.6% over the previous year.

The number of loans continues to increase, keeping pace with increasing student numbers. A total of 95 million loans were made in 2004-05, an increase of 1.6% over the previous year, and equivalent to 57 per FTE student. Loans per FTE student are little changed over 2003-04, but have increased by 7.1% over the last five years, despite the increasing availability of electronic resources. This increased availability of electronic resources, particularly at locations remote to the library buildings, is thought to have contributed to a 10% fall in the number of visits to library premises over the last five years. Overall, 122 million visits were made in 2004-05, equivalent to 73 per FTE student.

National Libraries

In real terms, after allowing for inflation, the grant-in-aid to The British Library has fallen by 46% over the last ten years. Other sources of income have also fallen in real terms, and the total resources available were £121 million in 2004-05. Staff salaries account for 72% of the total, compared to 59% ten years ago, while the total number of staff has fallen slightly, by 4% to 2,252. The number of reader visits decreased by 1.0% in 2004-05, falling for the fourth consecutive year to a total of 394,000. The number of items consulted has also fallen, by 1.3% in the last year, to an estimated 5.3 million.

At the National Library of Scotland, acquisitions of monographs and new media items fell by 15.8% and 6.6% respectively in 2004-05 compared to last year. The number of books purchased rose by 19%, with total spending on purchases up by 23% to £956,000. There was a decrease in total user visits, of 14.2%, but the number of items consulted rose by 5.1%, to over 312,000.

At the National Library of Wales, over 77,000 monographs were acquired in 2004-05, 7% less than last year. Acquisitions of serial parts increased, however, by 24%, to over 133,000. In contrast to England and Scotland, the number of visitors at the National Library of Wales increased in 2004-05, by 5.3%, although the number of issue slips fell by 9% to just over 90,000.

Notes on the compilation of this report

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

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

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 for 2004-05 were not available at the time of preparing this report. The tables included last year have therefore been repeated, as being the most up-to-date available; it is anticipated that the 2004-05 figures will be available towards the end of 2006. These figures are collected by the Committee of Departmental Librarians, and are available for a number of years. The figures are not complete, and trends are affected by the differing respondents in each year, and the changes in the organisation of the parent departments.

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

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

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

Measures included

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

However, outputs need to be related to inputs to gain a full picture. Many of the data in this volume are concentrated on expenditure (and income), staff and stock, together with the most prominent output measures of issues and visits. More data on electronic information sources would be desirable; at present the statistics are limited by the diversity of sources and the lack of agreed definitions in this area. Much work has been

done in recent years to improve the quality of data related to electronic information, and statistics of provision are sufficiently reliable for inclusion in this report. However, statistics of use are still problematic, so only a part of the picture can be given. Project COUNTER¹ is expected to improve data availability in this area, and some progress has already been made.

There have been various initiatives in both the public and academic library sectors in recent years to measure the impact of library services. In the academic sector, these are mainly project based, and do not lend themselves to sector descriptions of the type presented within this report. In the public library sector, a more quantitative approach has been promoted by the MLA, and the new Public Library Services Impact Measures (*see Bibliography for details*) are being collected on a national basis in respect of 2005-06.

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. 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.

¹ www.projectcounter.org/ [accessed 15/9/06]

The two main data sets on which this report is based are the CIPFA *Public Library Statistics – 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 sufficiently obvious 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