Library Resource Guide

THE DIGITAL SQUEEZE: LIBRARIES AT THE CROSSROADS

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2012 LIBRARY SPENDING PLANS

By Joseph McKendrick, Research Analyst
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Data collection and analysis performed with SurveyMethods.

HIGHLIGHTS

The economy may be healing, and more funds are flowing to North America's public, academic and special libraries. However, libraries continue to feel the sting of cutbacks and budget shortfalls. In addition, the historic shift to digital libraries is accelerating.

These are the findings of a new study, conducted by the Library Resource Guide (LRG)—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, conducted in December 2011 among libraries listed in ITI's American Library Directory, reveals current spending patterns for public, academic, government, and special libraries, and provides projections for budgets and spending trends for 2012.

Among the 730 participants in the survey are directors, administrators, managers, department heads, and librarians from the complete range of library settings. The largest segment, 41%, oversees part or all of the operations of public libraries, while another 40% oversees libraries in educational institutions. About 13% represents corporate, special, or other types of libraries, including healthcare institutions, nonprofit organizations such as foundations or museums, and legal libraries. Another 5% are government libraries, which include armed forces facilities, as well as federal and state agency libraries. (For detailed demographic breakdowns, see Figures 32–38 at the end of this report.)

Libraries covered in the survey represent a range of structures, sizes and segments. Close to half, 48%, are single, independent or standalone libraries, while another 16% are single facilities that are part of a larger multi-branch or multi-campus system. About 20% of respondents are reporting for entire library systems with multiple branches and facilities.

Among public community, government agency, corporate, or special libraries, more than one-third serve populations of fewer than 10,000 constituents, and 27% serve between 10,000 and 50,000 people. Another one-third serve more than 50,000 people. Among academic libraries, 25% represent institutions with more than 10,000 full-time equivalent students, and another 19% have between 10,000 and 25,000 full-time students. About 37% report between 1,000 and 5,000 students, while 17% are part of educational institutions serving less than 1,000 students.

Librarians and library managers are caught between rising demand from from their constituencies for greater technical and information sources, and ever-tightening financial support from their cities or sponsors. "Our patrons will continue to expect more for less at increased bandwidth, and on any and all delivery platforms," says one respondent, echoing the experiences of many. "But we fall far short on current funding, and are struggling to meet current needs."

Key findings from the survey include the following:

- Overall, participating libraries in the survey have seen gains in their total budgets. But this is not helping them keep up with the costs of staffing, operations, and equipment. As was the case last year, most libraries continue to be forced to cut expenses, including staff training, hours, and print subscriptions.
- While libraries continue to tighten up their programs and cut staff to the bone, they are also increasingly shifting resources to digital offerings. There has been a notable surge in the past year in adoption and offering of ebooks and other digital materials, while scaling back on print. More libraries are turning to the cloud to support operations or provide content.
- The recent economic downturn may be a temporary malady, but libraries recognize the shift to digital resources as a long-term trend that is changing the nature of their mission and services. Over the past year, attention has shifted from surviving the economic storm to delivering richer and more targeted resources to constituencies.

Patron demand is growing for content in electronic formats, including ebooks, internet, media streaming, and audio downloads, but smaller libraries are also caught in a tight squeeze. "We're not receiving enough funding to help support these trends," one respondent laments. "Just to be a member of an ebooks consortium costs $6,000 a year. Our whole budget for books for the whole collection is only $19,000. Unfortunately, that's too much to take out of that line item for a few select patrons."

"We are seeing a high demand for ebooks, greater than we can provide," says another respondent. "We have had to reduce the adult print budget to purchase ebooks through Overdrive. We need more money to be able to meet demands for both print and ebooks. Need to be able to integrate all ebook vendors products in a single ILS."

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STATE OF LIBRARY FINANCES: PURSE STRINGS LOOSEN, BUT BUDGETS STILL TIGHT

Overall, participating libraries in the survey have seen gains in their total budgets. But this is not helping them keep up with the costs of staffing, operations, and equipment. As was the case last year, most libraries continue to be forced to cut expenses, including staff training, hours, and print subscriptions.

Survey respondents were asked for their specific role in planning or managing their libraries' budgets, and those with budgetary authority were asked to provide annual spending figures and projections. In total, 74% had a significant level of budget authority, and 18% influenced or made recommendations over library expenditures. (See Figure 1.)

Overall, there has been an uptick in available funding for libraries across the spectrum. A total of 40% report having annual budgets exceeding $1 million, up from 36% a year ago. At the high end, the percentage reporting annual budgets exceeding $5 million rose somewhat from 10% to 12% of respondents. (See Figure 2.)

Respondents provided their total annual budgets for fiscal year 2011 and projections for 2012, including all aspects of operations and services—personnel, content acquisitions, collection development, operations, library systems, computers, A/V, media equipment, software, and services. Since respondents represent or oversee differing budget levels—some may only be able to provide responses for their particular library, while others may be representing multi-branch systems—budget results are presented across three structural categories:

- Single, independent libraries
- Single libraries within multi-branch systems
- Entire multi-branch systems

In terms of reported annual budgets, the average across all single standalone libraries is close to $1 million a year. Libraries that are part of multi-branch or multi-campus systems report average annual budgets of about $1.2 million. For respondents reporting for entire systems, which include multiple branches or facilities, the average budget is $8.6 million a year. (See Figure 3.)

Respondents also provided varying responses depending on their segment. Among single, standalone libraries on college campuses, budgets show little change over last year's results, now at about $1.3 million. Public community libraries, on the other hand, do reflect a jump in budgets over last year, rising about 18% to $879,000 a year. Respondents with special and corporate libraries also reported higher annual budgets than they did in last year's survey, now averaging more than $410,000 a year.

Respondents reporting for community public libraries that are branches of a larger system report the same annual budget levels as their standalone counterparts. For academic libraries, however, the average budget is higher for systems than standalone libraries, averaging $1.8 million. Among respondents reporting budgets across entire multi-branch library systems, public community library managers report budgets of close to $12 million, while academic systems average more than $5 million in annual expenditures. (Year-to-year comparisons for single libraries within multi-branch systems and entire systems are not available due to a change in survey methodology.)

Much of the funding streaming into libraries is helping to maintain staffing levels. In terms of where funding is being directed, a majority of respondents report that personnel and staffing consume more than half (52%) of their annual budgets. This is up from 46% devoted to staffing in last year's survey. However, there has been some slippage in the proportion of funding for content acquisition and collection development. (See Figure 4.)

As shown throughout this report, the pace of library digital migration has been accelerating over the past year since the previous LRG survey was conducted. However, when it comes to allocating budget resources, print continues to dominate library budgets. Still, in terms of content acquisition, while most funding goes to printed books and other printed materials, this proportion is slipping. This year, a combined total of 57% of budgets go to printed books and print-based serials or periodicals, down from 62% a year ago. (See Figure 5.)

The average budget numbers reported by respondents in this survey may have shown increases, but these increases appear to be spotty, and likely are being quickly absorbed into year-to-year increases in operational and acquisition costs. Looking at the percentage of respondents reporting budget changes, those seeing rising budgets remains unchanged from that seen in last year's survey. About 31% report increased budgets for their libraries, the same as a year ago. Another 41% report a decrease, which is also unchanged. (See Figure 6.)

In addition, when asked about budgets for the fiscal year ahead, respondents indicate there will be no change in the percentage of libraries expecting budget increases over the coming year. However, it's likely that fewer libraries will be seeing budget decreases in the year ahead, suggesting that the worst may be over economically. However, it is important to note that many institutions do not have an improved outlook and there is typically a lag between improvements in the economy and improvements in budgets.

By category, community public libraries are more likely than their academic or corporate/special counterparts to be anticipating increased spending capacity during the coming fiscal year, with 38% seeing increased spending. However, just as many

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public libraries also will be cutting back. Academic libraries are less likely to be seeing an inflow of new funds, with only 28% anticipating an increased budget for the year ahead. The level is also the same for corporate and special libraries. (See Figure 7.)

During the year 2011, state and local governments saw the final portions of federal stimulus funding intended to pick up the economy from the most recent recession. More than one-third of the libraries in this survey, 36%, report they felt at least some impact in their budgets as a result of the withdrawal of this stimulus spending. However, only 17% would rate this impact as "significant." (See Figure 8.)

Along with relatively flat or spotty budget increases, many of the budget cuts and freezes seen in last year's survey remain in place, the survey finds. An aggregate total of 77% of respondents report cutbacks over the past year, about the same as last year's survey. Personnel cuts (54%) have surpassed cutbacks in book acquisitions (52%) as the leading area facing cuts. Two-fifths of respondents also indicate they are continuing to cut back on periodicals and serials acquisitions, though this is less intense than in the previous LRG survey. One-third also have cut back on online subscriptions, a level unchanged from the last survey. There has been a rise in cutbacks to operations, now seen at one-third of libraries. (See Figure 9.)

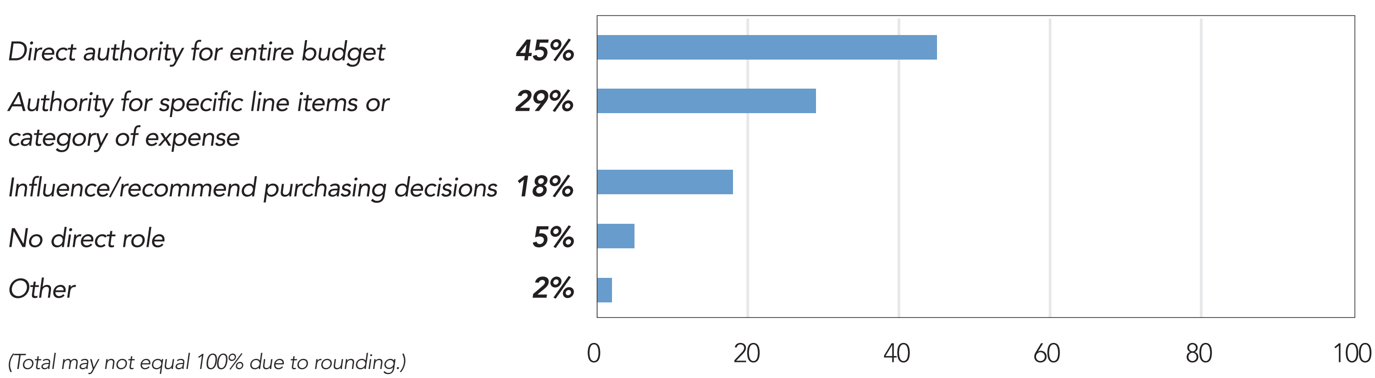
Eighty-one percent of respondents report taking some type of action to address budget shortfalls. The most prevalent action taken is cutting spending on subscriptions. Two-fifths froze salaries, and a similar number cut travel to conferences or training sessions. Areas being cut are in line with last year, though there has been a slight decrease in the percentage seeing travel cutbacks. More respondents report staffing cutbacks, however. One out of four still continue to pare down the number of hours worked, or even contemplate layoffs. (See Figure 10.)

As noted above, there has been an overall rise in the actual sizes of library budgets across the board, and there are areas that are seeing ramp-ups in spending. All spending increases are going to digital content offerings. Most notably, there has been a significant surge in acquisitions of ebooks by libraries over the past year. A total of 36% of respondents report that they have increased spending on ebooks, up from 19% just one year ago. Spending on online subscriptions is also up, from 21% to 27% of respondents. Also up sharply is spending on digital content collections and services, rising from 12% to 17% of respondents. (See Figure 11.)

Overall, most libraries covered in the survey receive funding from public sources, and this has grown modestly over the past year. Income streams from gifts, grants and endowments have remained steady. (See Figure 12.)

The survey suggests that general government funding for libraries may have held steady, but there has been a decrease in grant money flowing from government sources. Only private donors, or other sources, have shown an increase. (See Figure 13.) About one-third also rely on some funds from various fundraising committee activities. (See Figure 14.)

Figure 1: Respondents' Roles in Managing Library Budgets



(Total may not equal 100% due to rounding.)

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Figure 2: Annual Library Budget Ranges

(Includes all costs, including operations, acquisitions, and staffing)

	2011	2012
Less than $500,000	42%	40%
$500,000 to $1,000,000	15%	13%
$1 million to $3 million	20%	21%
$3 million to $5 million	6%	7%
More than $5 million	10%	12%
Don't know/unsure	6%	7%

Figure 3: Average Budgets—By Library Structure and Segment

SINGLE, INDEPENDENT OR STANDALONE LIBRARIES $999,825	2011	2012
Public	$744,974	$879,090
Academic	$1,252,232	$1,256,170
Special/Corporate	$315,162	$410,221
SINGLE LIBRARIES WITHIN A MULTI-BRANCH/MULTI-CAMPUS LIBRARY SYSTEM $1,225,217		
Public	—	$881,070
Academic	—	$1,815,985
Special/Corporate*	—	—
MULTI-BRANCH/MULTI-CAMPUS LIBRARY SYSTEM $8,651,718		
Public	—	$11,857,015
Academic	—	$5,118,671
Special/Corporate*	—	—

*(*Insufficient data)*

(Year-to-year comparisons for single libraries within multi-branch systems and entire systems not available due to change in survey methodology.)

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Figure 4: Allocation of Overall Library Budgets

	2011	2012
Personnel/staffing	**46%**	**52%**
Content acquisitions/collection development	**28%**	**25%**
Library systems, computers, A/V, media equipment, software/svcs	**9%**	**8%**
Operations/facilities	**11%**	**11%**
Other	**5%**	**4%**

Figure 5: Allocation of Library Content Acquisitions Budgets

	2011	2012
Printed books & other printed materials	**39%**	**39%**
Online databases, digital content collections	**19%**	**25%**
Serials/Periodicals (print)	**23%**	**18%**
Ebooks	**3%**	**3%**
Media titles (video, audio, computer-based modules, etc.)	**9%**	**9%**
Special programs	**2%**	**1%**
Other (microforms, manuscripts, archives, preservation, etc.)	**2%**	**2%**
All other categories	**3%**	**2%**

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Figure 6: Changes in Overall Budgets

	2009–10	2010–11	2011–12 (PROJECTED)
Increased by more than 10%	***4%***	***4%***	***3%***
Increased by 6% to 10%	***5%***	***3%***	***2%***
Increased by 5%	***5%***	***3%***	***3%***
Increased by 4%	***2%***	***2%***	***2%***
Increased by 3%	***3%***	***6%***	***3%***
Increased by 2%	***7%***	***7%***	***9%***
Increased by 1% or less	***5%***	***6%***	***8%***
INCREASED	***31%***	***31%***	***30%***
STAYED THE SAME	***26%***	***25%***	***29%***
DECREASED	***41%***	***41%***	***30%***
Decreased by 1% or less	***4%***	***4%***	***5%***
Decreased by 2%	***5%***	***4%***	***5%***
Decreased by 3%	***3%***	***3%***	***3%***
Decreased by 4%	***1%***	***1%***	***1%***
Decreased by 5%	***6%***	***5%***	***6%***
Decreased 6% to 10%	***9%***	***10%***	***5%***
Decreased by more than 10%	***13%***	***14%***	***5%***
Don't know/unsure	***3%***	***2%***	***11%***

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Figure 7: Budget Changes for the Year Ahead—By Library Segment

	PUBLIC	ACADEMICS	SPECIAL/CORP./OTHER
Increased	***38%***	***28%***	***27%***
Stayed the same	***21%***	***36%***	***31%***
Decreased	***39%***	***23%***	***28%***
Don't know/unsure	***9%***	***11%***	***14%***

Figure 8: Impact from Withdrawal of Federal or State Economic Stimulus Funding?

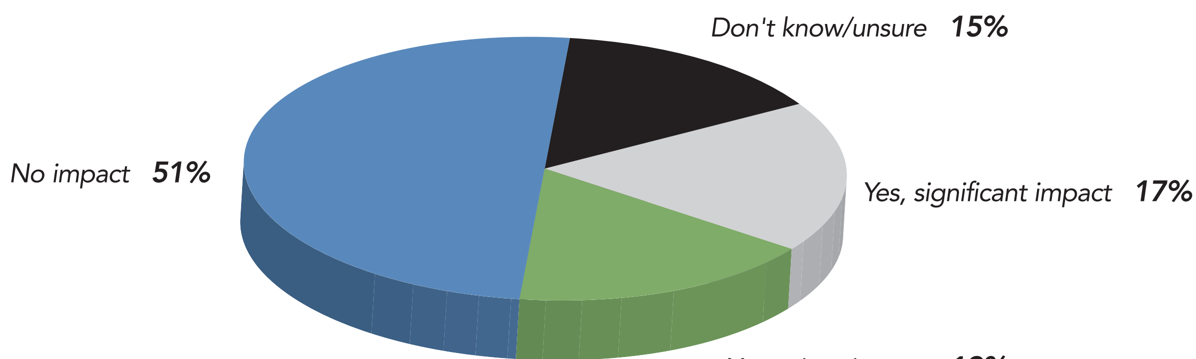

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Figure 9: Areas of Libraries Impacted by Budget Cuts or Freezes Over the Past Year

	2011	2012
Personnel	49%	54%
Book acquisitions	51%	52%
Periodicals/serials acquisitions	45%	39%
Online subscription acquisitions	34%	34%
Operations	28%	33%
Library technology equipment, software	33%	30%
Facilities upgrades/maintenance	28%	26%
Digital content collections/services	18%	20%
Library hours/availability	19%	18%
IT services	14%	12%
Don't know/unsure	5%	3%
Other	4%	5%
No cuts/budget freezes over past year	20%	20%

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Figure 10: Actions Taken by Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

	2011	2012
Cut spending on subscriptions	*48%*	*49%*
Cut or eliminated conference/travel/education budget	*44%*	*39%*
Salary freezes	*39%*	*38%*
Staff layoffs/staff hours cut	*22%*	*25%*
Applied for more grants	*23%*	*23%*
Moved more services/materials online	*24%*	*22%*
Re-negotiated contracts with vendors	*23%*	*21%*
Reduced library hours	*18%*	*18%*
Collaborated/shared with other libraries/Joined consortia	*15%*	*17%*
Added volunteers	*18%*	*16%*
Reduced programming	*15%*	*16%*
Lobbied for more funding from institutions	*15%*	*14%*
Consolidation of departments	*11%*	*13%*
Reduced IT expenditures	*13%*	*11%*
Closed facilities	*1%*	*3%*
Don't know/unsure	*4%*	*1%*
Other	*8%*	*8%*
No cuts/budget freezes over past year	*19%*	*19%*

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Figure 11: Areas Seeing Increased Spending or Support Over the Past Year

	2011	2012
Ebooks	19%	36%
Online subscription acquisitions	21%	27%
Personnel	17%	20%
Digital content collections/services	12%	17%
Library technology equipment, software	12%	16%
Book acquisitions	8%	10%
IT services	5%	7%
Facilities upgrades/maintenance	8%	7%
Operations	6%	6%
Periodicals/serials acquisitions	5%	6%
Cloud-based solutions	1%	5%
Library hours/availability	6%	4%
Multimedia/streaming media	5%	4%
Don't know/unsure	8%	4%
Other	5%	4%
Areas seeing increased spending or support over the past year	33%	27%

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Figure 12: Primary Sources of Library Funding

	2011	2012
Public funding-local	***43%***	***44%***
Public funding-state	***35%***	***40%***
University/school funding	***30%***	***33%***
Gifts and donations	***30%***	***30%***
Grants	***23%***	***22%***
Endowments	***12%***	***15%***
Public funding-federal	***10%***	***11%***
Corporate funding	***10%***	***10%***
Fee-based services	***6%***	***10%***
Special fundraising events	***9%***	***9%***
IT fees	—	***3%***
Don't know/unsure	***2%***	***3%***
Other	***6%***	***8%***

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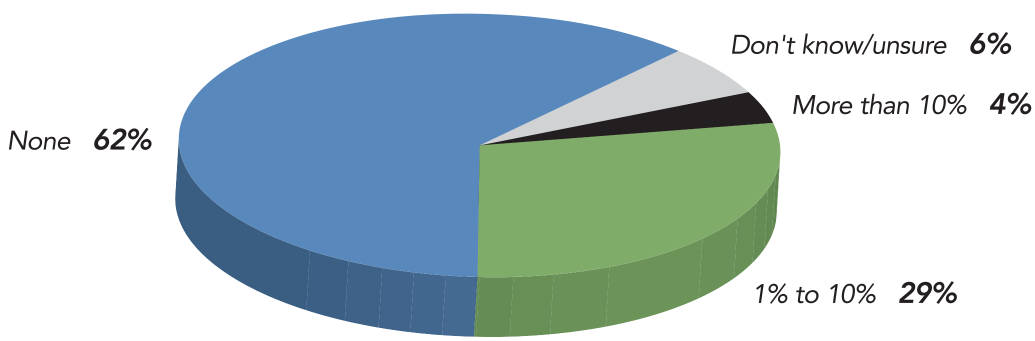
Figure 13: Types of Grants Received by Libraries

	2011	2012
Government grants	***62%***	***55%***
Grants from private individuals	***11%***	***15%***
Grants from foundations	***60%***	***55%***
Grants from corporations	***20%***	***20%***
Other	***7%***	***15%***

Figure 14: Percentage of Library Budgets from Fundraising Committee Activities



(Total may not equal 100% due to rounding.)

RISE OF THE DIGITAL LIBRARY

While libraries continue to tighten up their programs and cut staff to the bone, they are also increasingly shifting resources to digital offerings. There has been a notable surge in the past year in the adoption and offering of ebooks and other digital materials, while scaling back on print. More libraries are turning to the cloud to support operations or provide content.

The shift to the digital library has accelerated noticeably since the last survey just a year ago. Close to three-fourths of respondents, 74%, report that demand for their libraries' electronic offerings have increased over the past year. One-fourth, in fact, indicate that demand for digital resources has grown by more than 20%—up from 18% showing such high demand in the survey a year ago. (See Figure 15.)

Only one-third, 34%, report increased demand for print resources, and about the same percentage indicate demand for print is falling. Print demand is off from a year ago as well, when 43% still reported rising patron requests for print-based offerings.

"Our greatest demand and growth is with online access and especially full-text resources via network or mobile applications and devices in the broadest sense," says one respondent. "As we can we are looking to convert print (broadly speaking) to digital resources for unique collection deployment and access via remote access regardless of device type."

Demand for ebooks from libraries is soaring, as well. Close to two-thirds of respondents, 62%, say they are seeing rising demand from patrons for ebook access, up from 41% a year ago. There has also been a surge in demand for streaming media resources through libraries, using from 18% to 24% of respondents. Libraries continue to see rising demand as community or campus hot spots. More than two-thirds of respondents indicate that their facilities are sought for their wireless connectivity. This is the same level of demand as a year ago. A similar portion say their libraries serve as gateways for computer and web access. (See Figure 16.)

Keeping up with technology requires financial resources not available to many libraries. "I see the almost total abandonment of actual book reading in our area, except for the older patrons," says one respondent. "The younger patrons want to get on computers, visit their social network, play games, listen to music, and very occasionally research for homework. Our computers are dated, and I'm just trying to keep them up and running for those who do come in. If it weren't for donated computers from our area Wal-Mart distributor, we'd have no models newer than 2001."

Demand for ebooks is strongest at community public libraries, cited by 81% in this category. Public libraries also are seeing the strongest demand for audiobooks, as well as job search information. These rising trends in patron requirements point to the evolving role of public libraries as hubs for providing assistance in preparing people for the fast-evolving digital economy. (See Figure 17.)

There has also been an uptick in the amount of acquisitions budgets being spent on electronic resources. This year, 24% of respondents report that more than half of their acquisitions budgets are spent on electronic resources, up from 20%. (See Figure 18.)

"Patrons are expecting more and more of the special collections and archival materials to be available online, and we do not receive enough technical support to meet that expectation," says one respondent. "We have received some grant funding, and library funding has helped us place more and more resources online, however."

Just over one-third of libraries, 35%, have increased spending on information technology hardware, software and related IT services (not including online subscriptions) over the past year (since fiscal 2010). This is higher than the 29% originally predicted a year ago. In addition, this is also up from 29% reporting such increases in the survey a year ago. However, it appears spending may flatten in this area over the year ahead, with 32% anticipating increased spending on IT solutions. (See Figure 19.)

Spending on online subscriptions has held steady over the past year, remaining at strong levels, the survey finds. Forty-two percent of respondents say they have increased such spending, about the same as in last year's survey. This will remain consistent over the coming year as well. Only 12% indicated they were cutting back on such spending, a level unchanged from last year, and only 6% foresee a drop in online subscription budgets in the year ahead. (See Figure 20.)

Adoption of IT resources from public cloud computing providers is on the rise, the survey finds. A number of cloud services are available that provide a range of capabilities—from IT-centric tasks such as hosting servers and providing storage to business applications such as maintaining patron files or financial packages. More than one-third of libraries in the LRG survey, 34%, are either already using or planning to use cloud computing at their libraries, up from 20% last year. Twelve percent report they are already using cloud, up from 7% a year ago. (See Figure 21.)

There has been a notable upswing in adoption of cloud for both basic IT infrastructure requirements (such as online storage

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Data collection and analysis performed with SurveyMethods.

or processing) and communication functions (such as web conferencing, video, podcasting, email and collaboration). One-third of respondents are either using or planning to use cloud applications for interactive communications needs, up from 23% a year ago. In addition, close to one-third are employing cloud-based infrastructure services, up from 17% a year ago. (See Figure 22.)

There has also been a surge in adoption of intranet or extranet capabilities among libraries, with the percentage with this technology onsite rising from 66% to 73% over the past year. The percentage with Integrated Library Systems (ILSs) jumped from 72% to 82%. Technology tools available to patrons are also on the rise. Ebook readers are now available at 26% of sites, up from 14% a year ago. Another 25% also support audio or video teleconferencing services, up from 19%. (See Figure 23.)

When looking at upcoming purchases, ebook readers have jumped to the top of the list for many libraries. One-third plan to purchase ebook readers, making this the top purchasing priority in the year ahead. In last year's survey, 22% planned to purchase the readers. Also jumping ahead are audio and video teleconferencing technologies. (See Figure 24.)

"We have seen an increase in ebook checkouts and anticipate that to be an area of extreme growth," says one respondent. "It will be interesting to see if we need to shift money from print materials to ebooks to cover the demand or if at some point it will stabilize."

There appears to have been a leveling off in libraries' efforts to tap into popular social networking sites such as Facebook and LinkedIn. About half of the respondents indicate their libraries are engaging patrons through social networking, about the same as a year ago. In addition, there has been a decrease in the employment of wikis or blogs as part of engaging patrons, from 38% a year ago to 30% at the current time. On the upswing are sharing library web pages or subject guides (26% to 30%), document-sharing web apps (15% to 18%), and photo or video-sharing web apps (11% to 15%).(See Figure 25.)

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Figure 15: Change in Demand for Library Print and Electronic Offerings Over the Past Year

	ELECTRONIC		PRINT	
	2011	2012	2011	2012
Increased >20%	***18%***	***25%***	***5%***	***3%***
Increased 11% to 20%	***17%***	***12%***	***7%***	***4%***
Increased 6% to 10%	***20%***	***19%***	***13%***	***11%***
Increased 1% to 5%	***17%***	***18%***	***18%***	***16%***
INCREASED	***72%***	***74%***	***43%***	***34%***
NO CHANGE	***12%***	***9%***	***16%***	***18%***
DECREASED	***1%***	***2%***	***28%***	***35%***
Decresed 1% to 5%	***1%***	***1%***	***14%***	***15%***
Decreased 6% to 10%	***0%***	***0%***	***7%***	***10%***
Decreased 11% to 20%	***0%***	***0%***	***4%***	***7%***
Decreased >20%	***0%***	***1%***	***3%***	***3%***
Unsure	***15%***	***15%***	***12%***	***13%***

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Figure 16: What Library Patrons Have Been Requesting Over the Past Year

	2011	2012
Wireless access	***68%***	***68%***
Computer/web access	***62%***	***64%***
Ebooks	***41%***	***62%***
Technical information/training	***33%***	***34%***
Job search/career development information	***36%***	***34%***
Audiobooks	***32%***	***28%***
Streaming media	***18%***	***24%***
Medical	***17%***	***18%***
Primary and continuing education programs/requirements	***15%***	***15%***
Computer games/simulations	***13%***	***13%***
English language instruction	***12%***	***9%***
Don't know/unsure	***7%***	***9%***
Other	***5%***	***3%***

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Data collection and analysis performed with SurveyMethods.

Figure 17: What Library Patrons Have Been Requesting Over the Past Year—By Library Segment

	PUBLIC	ACADEMICS	SPECIAL/CORP.
Wireless access	***83%***	***70%***	***36%***
Computer/web access	***69%***	***66%***	***45%***
Ebooks	***81%***	***60%***	***31%***
Technical information/training	***35%***	***32%***	***33%***
Job search/career development information	***68%***	***12%***	***2%***
Audiobooks	***55%***	***12%***	***5%***
Streaming media	***21%***	***36%***	***17%***
Medical	***11%***	***21%***	***29%***
Primary and continuing educ. programs/requirements	***19%***	***10%***	***19%***
Computer games/simulations	***25%***	***6%***	***0%***
English language instruction	***14%***	***6%***	***0%***

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Figure 18: Percent of Acquisitions Budgets Spent on Electronic Resources

	2011	2012
Less than 10%	***33%***	***29%***
11% to 25%	***15%***	***19%***
26% to 50%	***14%***	***15%***
More than 50%	***20%***	***24%***
Don't know/unsure	***18%***	***13%***

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Figure 19: Changes in Library Spending on Information Technology Hardware, Software and Related IT Services

(Not including online subscriptions)	2009–10	2010–11	2011–12 (PROJECTED)
Increased by more than 10%	***6%***	***8%***	***3%***
Increased by 6% to 10%	***8%***	***10%***	***8%***
Increased by 1% to 5%	***15%***	***17%***	***21%***
INCREASE	***29%***	***35%***	***32%***
NO CHANGE	***38%***	***36%***	***38%***
DECREASE	***10%***	***9%***	***11%***
Decreased by 1% to 5%	***5%***	***5%***	***5%***
Decreased by 6% to 10%	***2%***	***2%***	***3%***
Decreased by more than 10%	***3%***	***2%***	***3%***
Don't know/unsure	***23%***	***19%***	***20%***

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Data collection and analysis performed with SurveyMethods.

Figure 20: Changes in Library Spending on Online Subscriptions

	2009–10	2010–11	2011–12 (PROJECTED)
Increased by more than 10%	***8%***	***8%***	***3%***
Increased by 6% to 10%	***13%***	***12%***	***14%***
Increased by 1% to 5%	***20%***	***22%***	***22%***
INCREASE	*41%*	*42%*	*39%*
NO CHANGE	*31%*	*36%*	*41%*
DECREASE	*13%*	*12%*	*6%*
Decreased by 1% to 5%	***8%***	***6%***	***3%***
Decreased by 6% to 10%	***2%***	***3%***	***3%***
Decreased by more than 10%	***3%***	***3%***	***0%***
Don't know/unsure	***15%***	***10%***	***13%***

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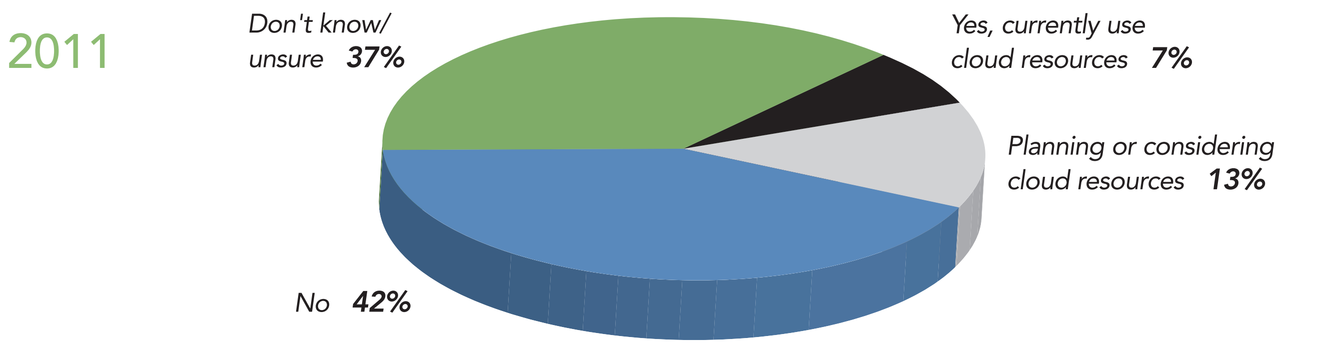
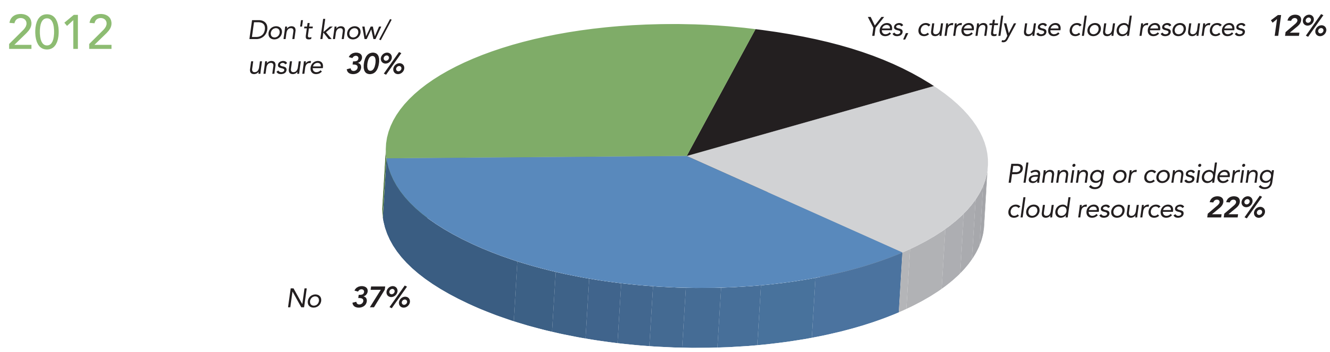
Figure 21: Access Cloud Computing Resources?





(Total may not equal 100% due to rounding.)

Figure 22: Cloud Computing Services Used or Planned for Use by Libraries

	2011	2012
Communications (web conferencing, video, podcasting, email, collaboration)	***23%***	***33%***
IT infrastructure (online storage, processing)	***17%***	***32%***
Specialized business applications (business, management, marketing, market research)	***6%***	***9%***
Don't know/not sure	***66%***	***49%***
Other	***3%***	***6%***

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Figure 23: Current Information Technology Tools and Platforms Used Within Libraries

	2011	2012
Online library catalog/OPAC	***91%***	***91%***
Integrated Library System (ILS)	***72%***	***82%***
LAN/WAN/wireless network	***76%***	***75%***
Intranet/extranet/website	***66%***	***73%***
PCs/kiosks/laptops/mobile devices	***60%***	***65%***
Web-based (IM or email) reference service	***54%***	***55%***
Authentication solutions	***29%***	***35%***
Link resolvers	***29%***	***30%***
Ebook readers	***14%***	***26%***
Audio/video teleconferencing	***19%***	***25%***
Electronic Resource Management Systems	***22%***	***21%***
RFID check-in/check-out, inventory control	***15%***	***18%***
Discovery services	***11%***	***15%***
Other	***3%***	***3%***

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Figure 24: Information Technology Tools and Platforms to Be Purchased by Libraries in 2012

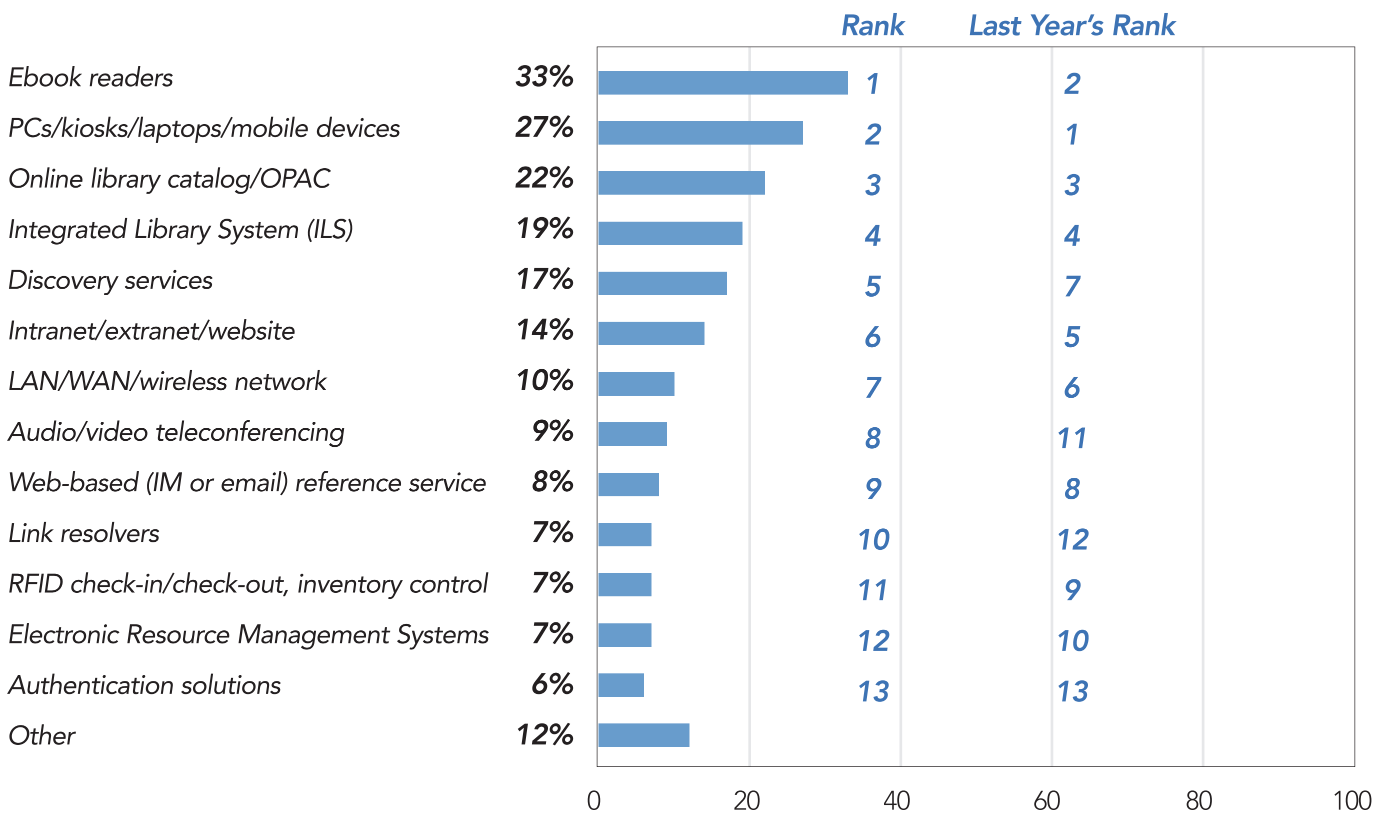

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Figure 25: Social Networking Services in Use at Libraries

	2011	2012
Social networking (e.g., Facebook, LinkedIn)	***52%***	***49%***
Wikis or blogs	***38%***	***30%***
Sharing library web pages and subject guides (e.g., LibGuides)	***26%***	***30%***
Patron reviews, ratings	***24%***	***24%***
Document-sharing web apps	***15%***	***18%***
Audio or video podcasts	***18%***	***17%***
Photo or video-sharing web apps	***11%***	***15%***
We don't offer social networking tools/opportunities	***16%***	***14%***
Tagging and rating	***12%***	***11%***
Don't know/unsure	***20%***	***24%***
Other	***1%***	***1%***

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STRATEGIES: LOOKING FORWARD OVER THE NEXT DECADE

The recent economic downturn may be a temporary malady, but libraries recognize the shift to digital resources as a long-term trend that is changing the nature of their mission and services. Over the past year, attention has shifted from surviving the economic storm to delivering richer and more targeted resources to constituencies.

While digital dominates the agendas of most libraries this year, this is only one part of an increasing commitment to a customer service culture. When asked what their leading priorities would be over the coming year, 58% of respondents say they want to improve or expand their customer service. This is up from 51% a year ago, and may indicate that library managers are emerging from the bunkers that they took shelter in during the economic storm. There is also a growing commitment to increase the availability of online publications or digital access, cited by 57%—and up from 48% a year ago. Also increasing as a priority is the ability to provide assistance or education to patrons on using information access tools and services, up from 50% to 54%. (See Figure 26.)

Nevertheless, tight budgets do remain a challenge for a majority of libraries. As shown earlier in the report, many service and acquisition budgets are still being pared, and more than four-fifths of respondents see this as their greatest challenge over the next 5 years. Keeping up with fast-paced changes in the information technology world also is keeping librarians awake at night, indicated by more than two-thirds of respondents, 68%, and up from 64% a year ago. (See Figure 27.)

As libraries seek to define their new roles in the midst of the cross-currents of lean finances and digital demand, some are articulating their visions through strategic plans, similar to those followed by businesses and government agencies. However, only just over one-third of respondents, 35%, indicate their libraries have developed such a roadmap for the immediate future. This is essentially unchanged from a year ago. (See Figure 28.)

A common strategy for many libraries is to pool their resources and purchases from consortia and networks. Half of the respondents, indicate they belong to one or two consortia, reflecting no change from last year. (See Figure 29.) However, respondents are reporting greater levels of support from the consortia to which they belong. About 26% report increased support over the past year, up from 21% in last year's survey. (See Figure 30.) In most cases, less than 10% of library budgets go to consortia materials. (See Figure 31.)

Many librarians and library managers see their institutions as hubs that will help address the gap between unemployment and skills shortages among employers. "We anticipate the demand to increase in the area of technology training," says one respondent. "The digital divide often has patrons coming into the library that are unfamiliar with the technology that is now a backbone to our society. For instance applying for the most entry-level jobs requires basic computer skills that are still lacking in some segments of the population. This area is more directly affected by training than lack of funding."

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Figure 26: Libraries' Priorities for the Coming Year

	2011	2012
Improve/expand customer service	**51%**	**58%**
Increase availability of online pubs/digital access	**48%**	**57%**
Provide assistance/education on inf. access tools/svcs	**50%**	**54%**
Drive usage of current resources	**41%**	**40%**
Enhance discovery of collections	**41%**	**43%**
Identify and reach out to new groups of patrons	**33%**	**36%**
Repurpose physical space	**34%**	**34%**
Develop unique library collections	**17%**	**23%**
Institute special programs for constituents/patrons	**21%**	**22%**
Join or increase participation in consortium/network	**16%**	**18%**
Physical expansion/upgrade of facilities	**19%**	**17%**
Enhancing user workflow tools	**16%**	**15%**
Don't know/unsure	**4%**	**4%**
Other	**4%**	**5%**

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Figure 27: Libraries' Challenges Over the Next 5 Years

	2011	2012
Maintaining services with tight budgets	***83%***	***82%***
Keeping up with changes in information technology	***64%***	***68%***
Identifying new sources of funding	***43%***	***44%***
Migrating print content to digital formats	***31%***	***35%***
Finding and retaining knowledgeable staff	***33%***	***33%***
Keeping facilities open/at preferred operational levels	***37%***	***32%***
Competing/keeping up with public online svcs/offerings	***26%***	***29%***
Other	***5%***	***3%***

Figure 28: Library Have Strategic Plan?

	2011	2012
Yes	***37%***	***35%***
Under development	***25%***	***29%***
Under consideration	***12%***	***16%***
No	***19%***	***18%***
Don't know/unsure	***7%***	***2%***

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Figure 29: Number of Libraries' Consortia or Network Memberships

	2011	2012
None	***11%***	***11%***
One	***28%***	***28%***
Two	***22%***	***23%***
Three	***15%***	***16%***
Four	***6%***	***8%***
Five	***2%***	***2%***
More than 5	***4%***	***4%***
Don't know/unsure	***13%***	***8%***

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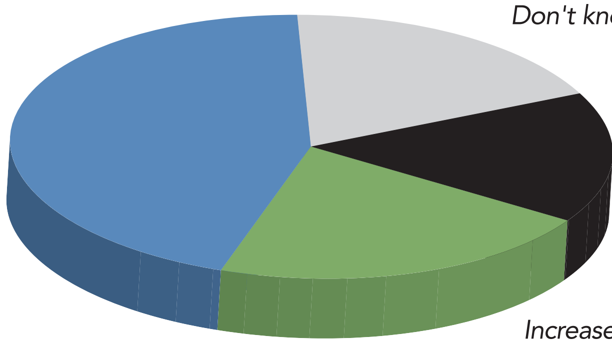
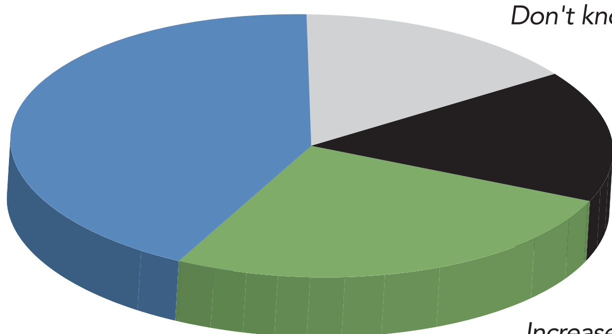
Figure 30: Changes in Support from Consortia or Networks Over the Past Year

2011



2012



(Total may not equal 100% due to rounding.)

Figure 31: Percent of Total Budget Spent for Consortia or Network Services/Materials

	2011	2012
Less than 10%	***44%***	***49%***
11% to 25%	***15%***	***18%***
26% to 50%	***6%***	***5%***
More than 50%	***2%***	***3%***
Don't know/unsure	***33%***	***26%***

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DEMOGRAPHICS

Figure 32: Affiliations of Libraries Surveyed

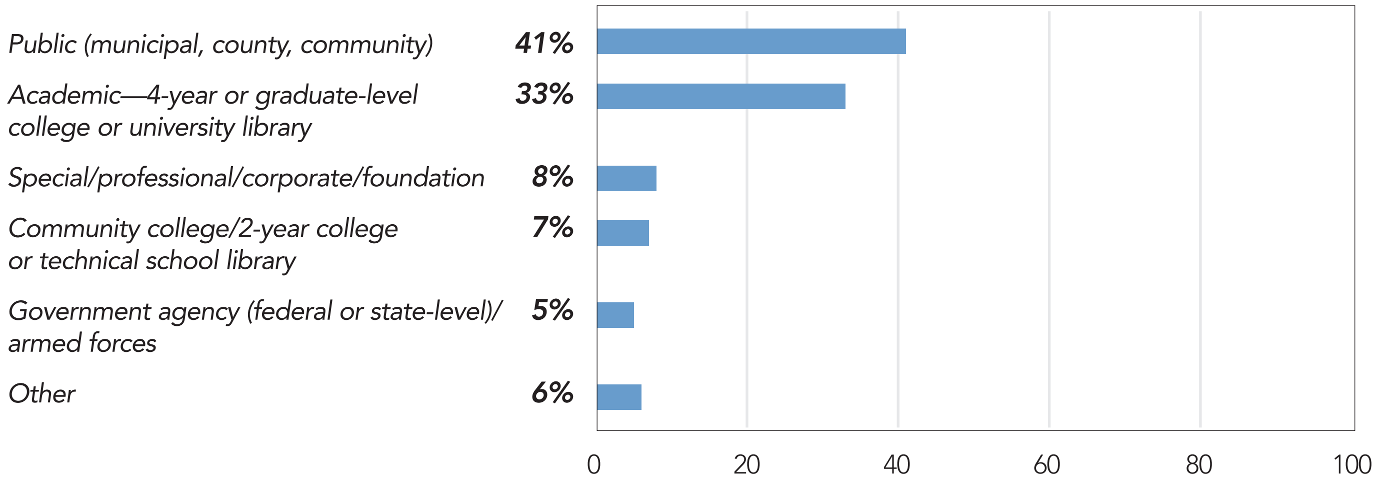
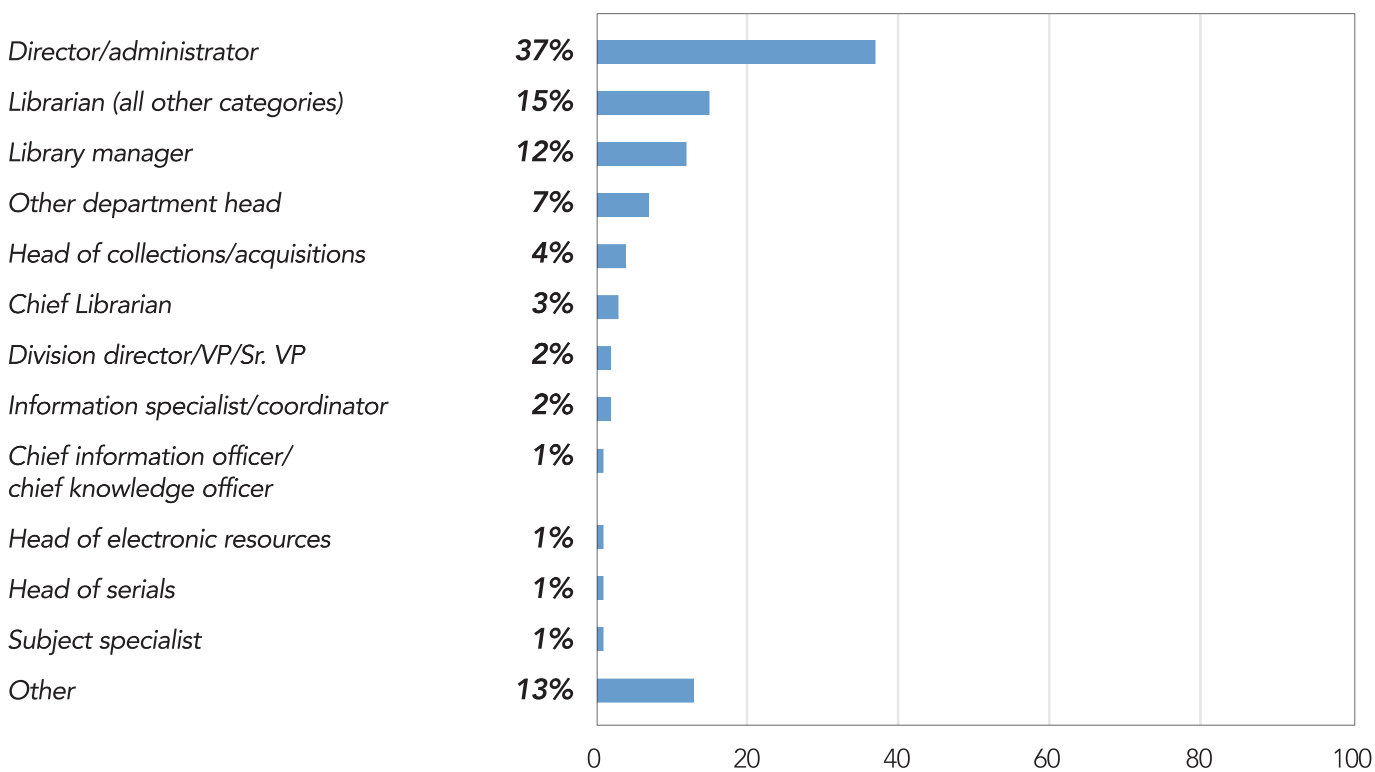


Figure 33: Respondents' Titles



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Data collection and analysis performed with SurveyMethods.

Figure 34: Populations Served—Public, Government and Special Libraries

(Academic libraries not included. For corporate or institutional library, based on number of employees/members of parent organization.)

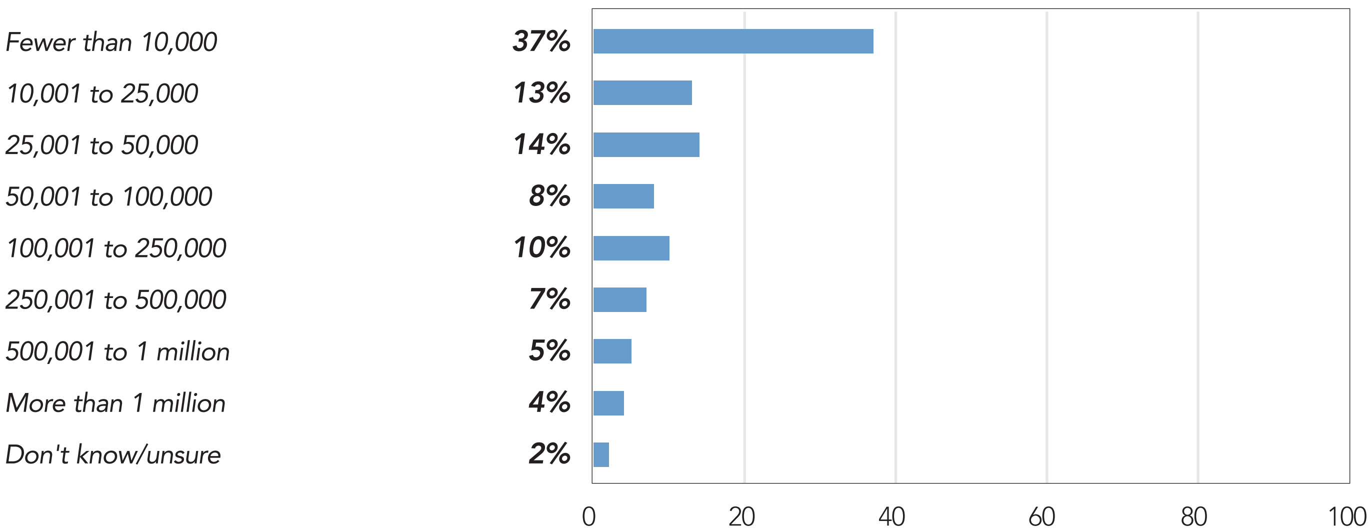
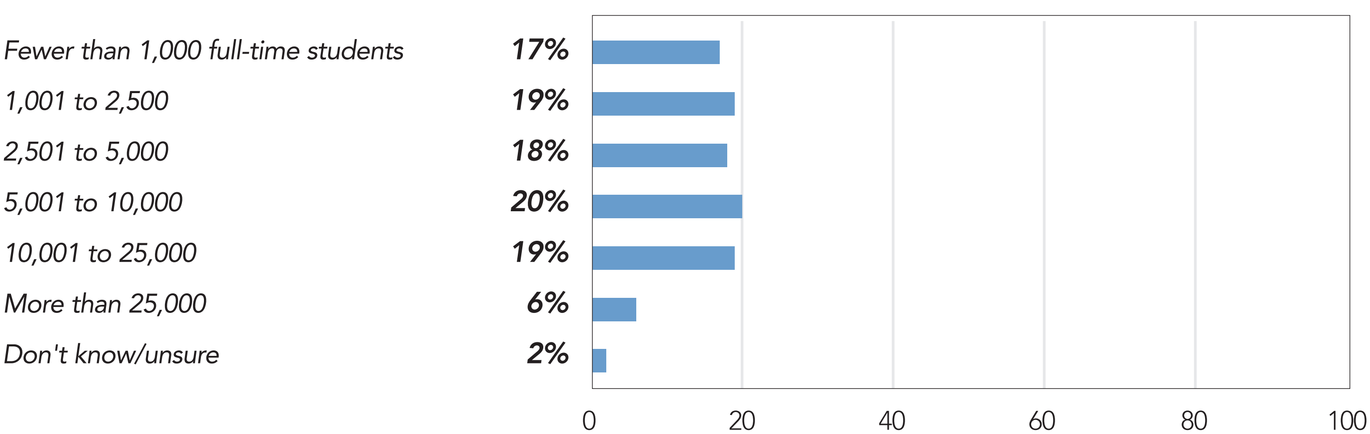


Figure 35: Full-Time Enrollement—Academic Libraries

(Includes 4-year and graduate-level institutions, community colleges and technical schools)



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Data collection and analysis performed with SurveyMethods.

Figure 36: Types of Special, Professional, Corporate, or Other Types of Libraries Surveyed

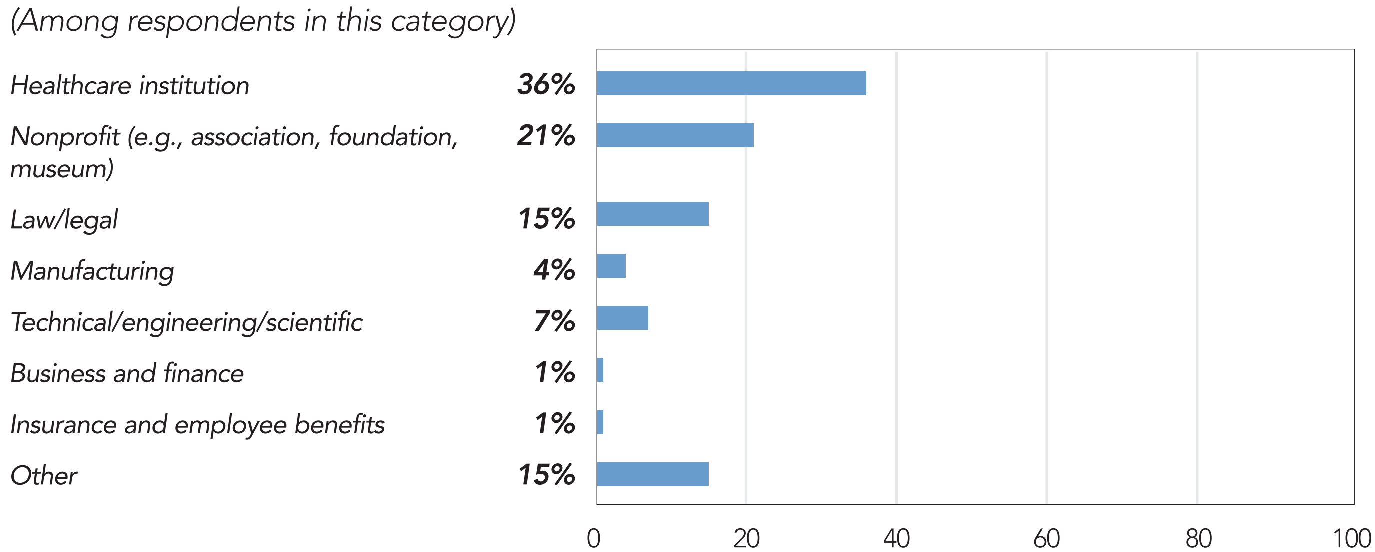
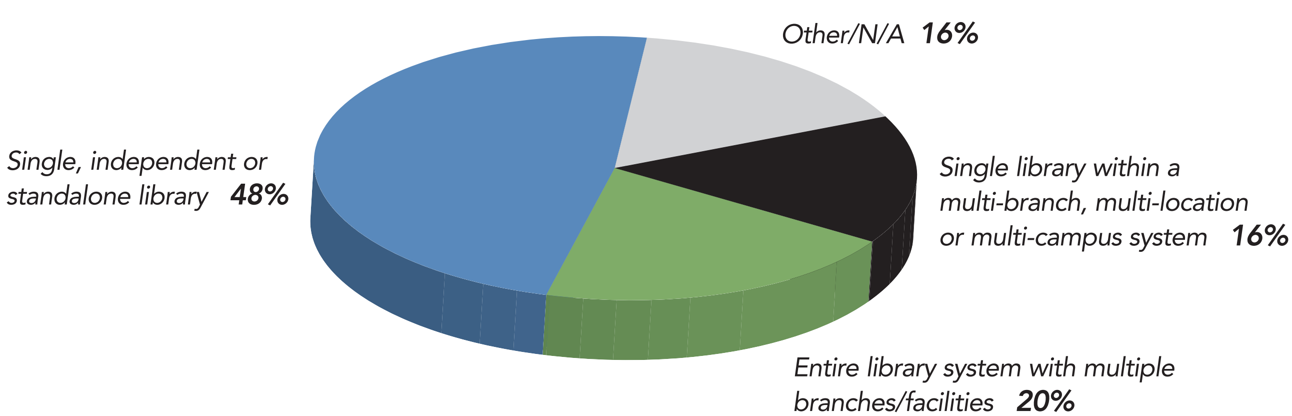


Figure 37: Type of Library Infrastructures Surveyed



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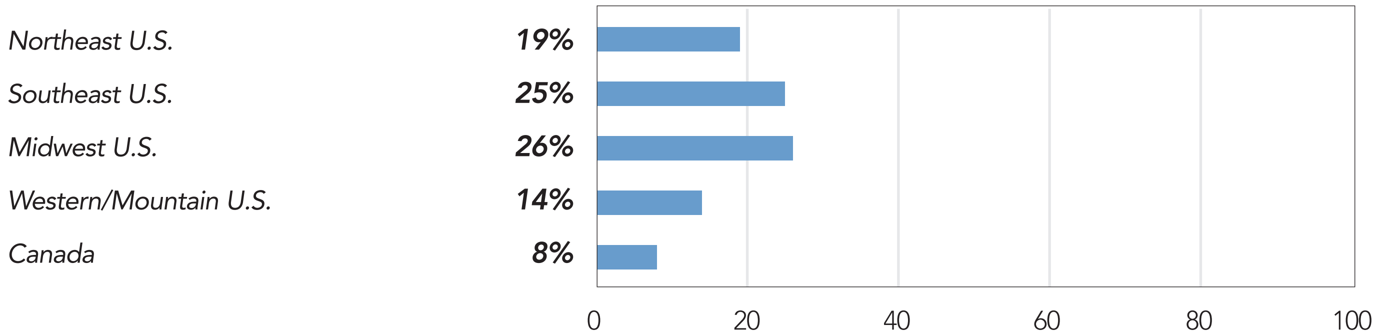
Data collection and analysis performed with SurveyMethods.

Figure 38: Respondents' States/Provinces



NUMERICAL TOTALS

Northeast U.S. 19%

CT	12
DC	7
DE	1
MD	7
MA	12
ME	2
NH	8
NJ	17
NY	40
PA	27
RI	0
VT	5

Southeast U.S. 25%

AL	11
AR	7
FL	21
GA	11
KY	3
LA	10
MS	3
NC	21
OK	10
PR	5
SC	4
TN	10
TX	33
VA	26
VI	1
WV	5

Midwest U.S. 26%

IA	8
IL	34
IN	18
KS	9
MI	24
MN	11
MO	16
ND	6
NE	7
OH	27
SD	5
WI	22

Western/ Mountain U.S. 14%

AK	2
AZ	15
CA	46
CO	16
HI	3
ID	5
MT	0
NM	1
NV	2
OR	2
UT	3
WA	7
WY	0

Canada 8%

Alberta	12
British Columbia	5
Manitoba	2
New Brunswick	0
Newfoundland and Labrador	0
NW Territories	0
Nunavut	0
Nova Scotia	4
Ontario:	25
Prince Edward Island	0
Saskatchewan	2
Quebec	8
Yukon	0

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METHODOLOGY

This survey is based on a sample of names drawn from Information Today, Inc.'s *American Library Directory* database. Respondents were solicited from email notifications to a list of 50,000 individuals at public, academic, government, and special libraries. Responses were collected between December 1, 2011, and December 31, 2011. As an incentive, respondents were offered a copy of the final results and entry into a drawing for an Apple iPad computer. A total of 730 valid surveys were gathered.

ABOUT THE RESEARCHERS

LRG's "Benchmark Study on Library Spending" was conducted by Unisphere Research, the research arm of Information Today, Inc. and publisher of *Database Trends and Applications.* Since 2004, Unisphere has completed more than 80 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, Sybase, Symantec, Teradata, Informatica, VMware, and many others. Unisphere Research is uniquely capable of producing cogent market analysis through this experience and its working relationship with the editors of Information Today, Inc.'s (ITI's) library products.

Information Today, Inc. (www.infotoday.com) is the publisher and producer of a wide range of information products, including books, directories, magazines, newsletters and conferences, all targeted at the library and information professional community. Among ITI's publications are the *American Library Directory, The Library and Book Trade Almanac, Computers in Libraries* magazine and the flagship *Information Today* newspaper.

Principal Researcher:
Joseph McKendrick, Analyst, Unisphere Research, a division of Information Today, Inc.

Advisors to the Research Project:
Dick Kaser, Executive Editor, *Computers in Libraries* magazine
Owen O'Donnell, Editorial Director, *American Library Directory*
Catherine Barr, Editor, *Library & Book Trade Almanac*

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