

## THE ECONOMIC DOWNTURN AND LIBRARIES Survey findings

*It seems to me that libraries will become more important during these days of cutbacks and efficiency/effectiveness measures, not less so*

[Small high school library, USA].



CIBER

University College London, December 2009

A global survey of the world's  
libraries in challenging times



## EXECUTIVE SUMMARY 1

This survey, of 835 libraries worldwide, confirms what many had expected, that the short-term outlook for libraries in all sectors is a challenging one, given the slow down in the economy in many parts of the world. It is clear that most libraries are already feeling the pinch, with budget settlements for the current financial year that are either stand still (i.e. no increase in absolute terms) or actually smaller than last year. Fortunes are however mixed, and some libraries are faring much better than the doom and gloom merchants would have us think. But the reality for the vast majority looking forward into the next two financial years is that recessionary pressures really are going to make an impact.

To put some figures on these bare bones: 37.4% of institutions expect to cut spending on information resources over the next two years, 28.3% expect to cut staffing budgets and 18.1% their spending on services and infrastructure. These figures are based on absolute figures and do not account for cost inflation: publisher costs, labour costs or general inflation. We are therefore talking about some fairly deep and painful cuts, not just a continuation of the attritional gains in library efficiency that have been driven for years by below inflation budget rises.

Our survey suggests that academic libraries will be the hardest hit by these budgetary pressures, with 34.3% of them expecting to receive a smaller budget in two years' time than they do

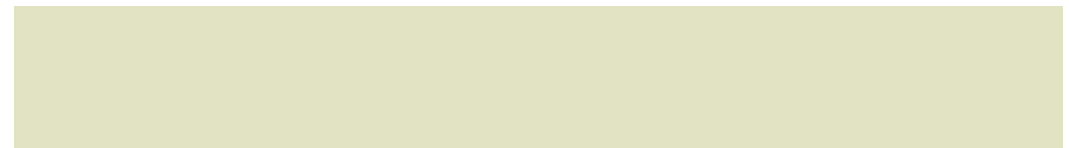
currently. For a small minority, 6.9%, the pain will be very severe, since their budgets will be more than 10% smaller than they are this year.

The outlook is not much rosier outside academia: 29.9% of public sector and government libraries and 23.5% of libraries in the corporate (for profit and not for profit) sectors are also anticipating smaller total library budgets than they enjoy today.

The sector as a whole is having to look more deeply: efficiency saving are

probably no longer enough and some serious thinking about the future shape of services and provision is needed.

Much of the shortfall will be absorbed through reduced spending on information content, with 69.1% of respondents in all sectors and territories expecting to spend the same or less than they do today in absolute terms. Since 'publisher inflation' has historically been running at a higher level than general retail inflation, this suggests some big changes.





## EXECUTIVE SUMMARY 2

Staffing budgets also look vulnerable, if less acutely so than resources budgets. Most institutions (71.7%) are not planning to cut staffing levels which will be welcome news for those in or planning to join the library profession. Some jobs will go, however, especially in the academic sector which is the least optimistic about the impact of financial stringencies generally. Where jobs 'disappear', this is likely to be a continuation of a long running trend, but perhaps on an accelerated scale, of freezing recruitment and failing to replace staff who leave.

Most institutions seem to be looking to cut their resource budgets (hard) and to rely on natural wastage to buffer the financial storm. Relatively few (only 18.1%) say that they are actively

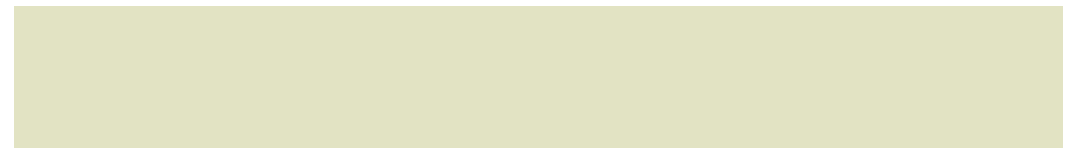
planning to cut library services or infrastructure over the next two years. Where this is inevitable, the main casualties are likely to be library opening hours and levels of enquiry desk service: dimming the lights rather than turning them off altogether. Building projects and IT projects, which are largely financed differently, appear to be relatively safe.

Looking in more detail at plans for acquiring publisher content, we find that print (textbooks, monographs and journals) is the main casualty and that the shift to e-only provision is likely to accelerate. Already, our survey shows that a majority, 57.2%, of library spending goes on electronic formats and this proportion is bound to rise rapidly, since library managers tell us

that they are much more likely to switch to e-only journals and e-books (especially) rather than persevere with print. This has profound implications.

This report has more than enough in it to be a very depressing read. What comes through, however, both in the key findings and in the many unsolicited comments from librarians is not depression or even resignation, but a much more positive and realistic assessment. Library managers see the current difficulties as being an

opportunity to rethink what 'library' means in the twenty first century. It is clear that we have to go beyond measuring *activity* (through benchmarking and performance indicators) to thinking more about the positive impacts of formal information provision on student learning, research performance and other key aspects of organisational missions.



## BACKGROUND

The idea for this survey was first hatched at the 2008 Charleston Library Conference, when the concept of the Charleston Observatory was first put forward. The Observatory is a research adjunct for the Conference and the medium by which some of the great ideas generated there can be turned into robust larger scale research projects.

The Observatory provides continuity and build and a place where information experiments can be undertaken. It offers a platform upon which evidence can be collected in a robust and validated manner, and where diverse information communities can come together and share their data for the benefit of all.

The aims of this report are

- a) to examine the changes that libraries are making in the context of the economic downturn: where budgets and resources are being focused and why;
- b) to determine what practical and positive things are being done; and to assist the community as a whole by increasing co-operation and transparency, sharing best (innovative) practice, and identifying priorities.

In line with that spirit of co-operation, the survey questions were chosen by the community itself, by a panel of nearly 200 librarians.

This report, the first fruit of the Charleston Observatory, is co-sponsored by Baker & Taylor's YBP Library Services and digital provider ebrary®. We are also very grateful to the organisers of the Charleston Conference and to the Society of College, National and University Libraries (SCONUL) for their invaluable help and advice.

We must also thank the many hundreds of senior library managers who gave so willingly of their time to make the survey a success.

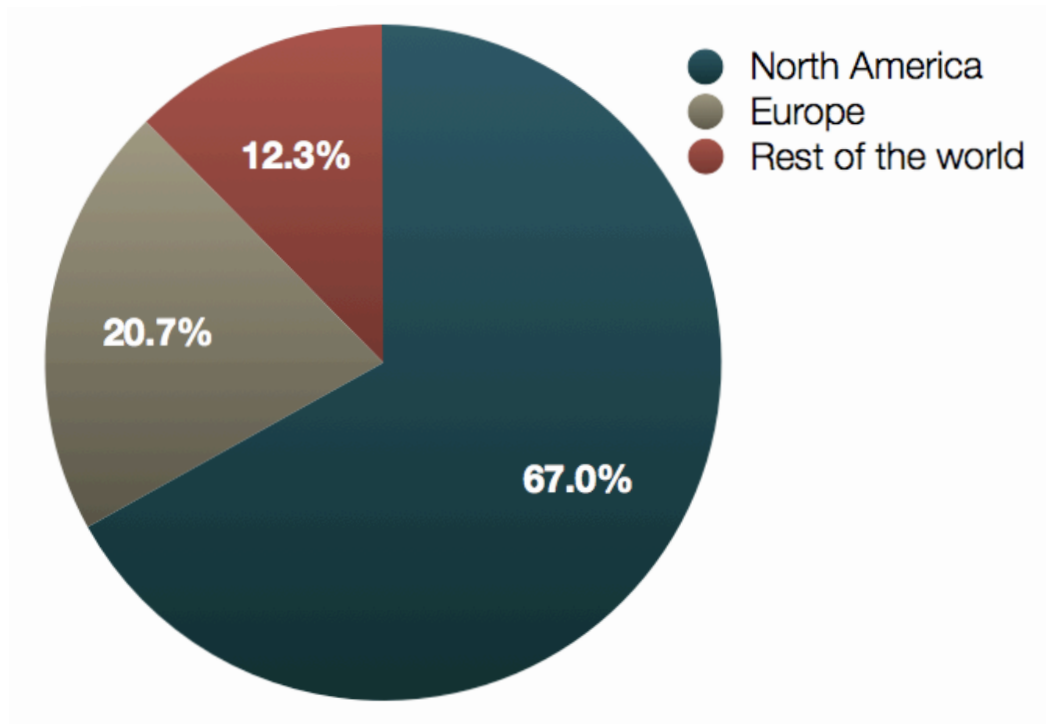
**Professor David Nicholas**

**Dr Ian Rowlands**

CIBER, University College London

# Survey demographics 1

Responses by geographic region



## Notes

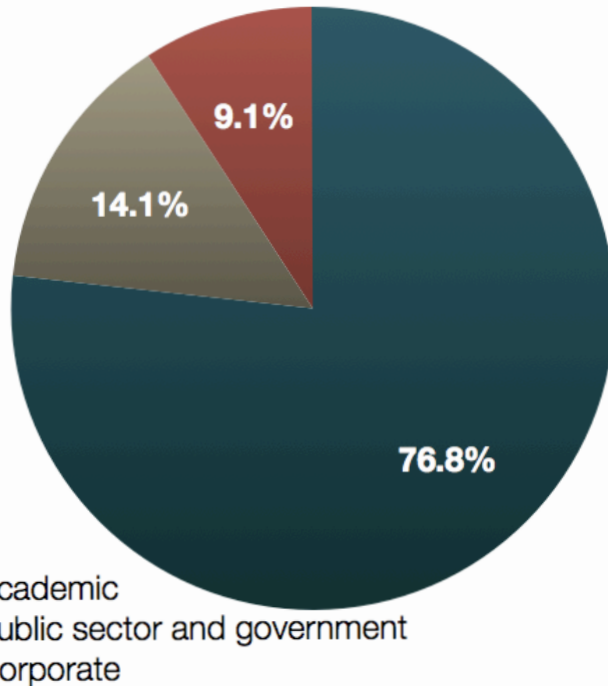
The majority of respondents in this survey were from the USA (62.3%) followed by the UK (12.7%), the next largest country representation.

Europe as a whole and the rest of the world are under-represented, partly as the result of the survey being conducted in English only. However, analysis of the responses across many of the variables show striking consistency, regardless of geographic region. Where there are striking geographical differences, they are highlighted in this report.

**A global survey: 835 libraries in 61 countries participated.**

# Survey demographics 2

Responses by sector



### Notes

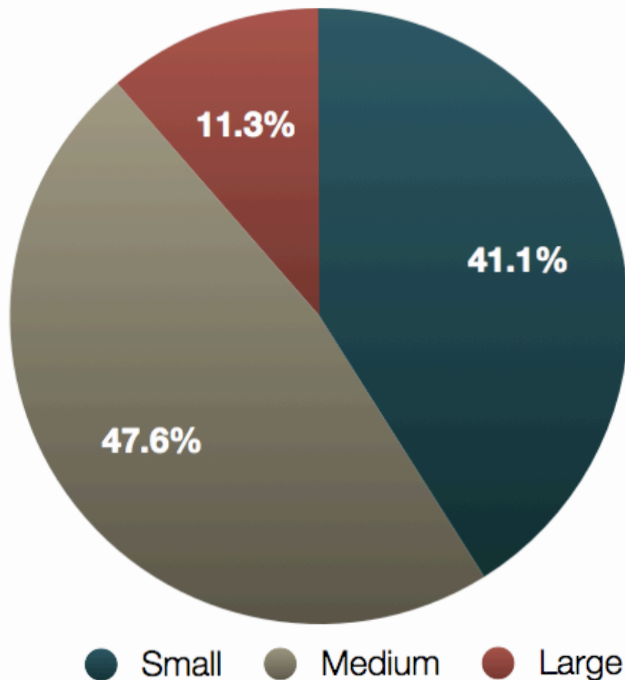
The survey includes responses from universities (publicly and privately funded), further education and community colleges, high schools and secondary schools, national libraries, government agencies, public libraries, hospitals and corporations (for profit and not for profit).

Universities, an important focus of the survey, make up almost two-thirds (63.6%) of the sample.

**Libraries in all economic sectors participated in this survey.**

# Survey demographics 3

Responses by library size (number of users)



## Notes

Institutions were asked to place themselves in ten size bands according to the number of registered library users they service. For this graphic, we define 'small' libraries as those with up to 4,999, 'medium' libraries with up to 39,999, and 'large' libraries with more than 40,000 users.

Where major differences relate to size of library, they are highlighted in this report.

**The libraries surveyed here are mainly large and medium scale, servicing millions of users.**

# This year's library budget

Current total library budget compared with last year: column percentages

	Academic	Public sector and government	Corporate
<i>More than 10% down</i>	<b>27.0</b>	<b>27.0</b>	<b>24.6</b>
<i>Less than 10% down</i>	<b>16.8</b>	<b>9.4</b>	<b>11.4</b>
<i>About the same</i>	<b>39.4</b>	<b>45.9</b>	<b>50.9</b>
<i>Less than 10% up</i>	<b>13.0</b>	<b>11.8</b>	<b>11.3</b>
<i>More than 10% up</i>	<b>3.6</b>	<b>5.9</b>	<b>1.9</b>

## Notes

Institutions were asked to compare their total library budget (including staffing, resources and operational costs) for the *current* financial year and the previous year. Since this was a global survey and there are so many potential measures of 'inflation', respondents were asked to compare absolute figures.

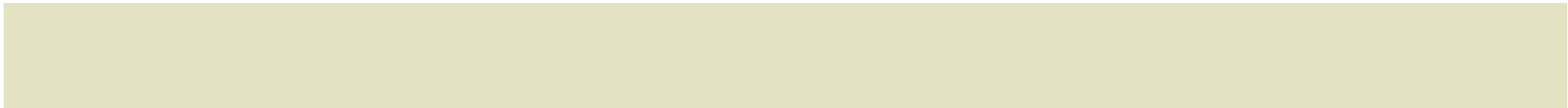
The picture that emerges is one of mixed fortunes, with a minority experiencing a budget uplift, presumably just to hedge inflation in many cases. For most institutions, libraries either had a stand still budget (no allowance for inflation) or cuts, and in around a quarter of cases these were severe, 10 per cent or more down. Academia is the worst hit.

**Most libraries are feeling the pinch in this financial year, with either a standstill budget or real cut backs.**



# Next year's library budget

Outlook for total library budget in the next financial year, ignoring inflation: column percentages



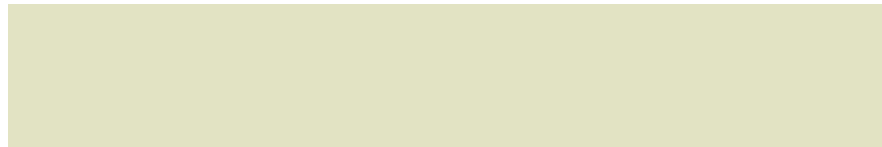
	Academic	Public sector and government	Corporate
<i>More than 10% down</i>	<b>18.1</b>	<b>19.1</b>	<b>13.7</b>
<i>Less than 10% down</i>	<b>21.6</b>	<b>10.8</b>	<b>9.8</b>
<i>About the same</i>	<b>47.5</b>	<b>53.6</b>	<b>52.9</b>
<i>Less than 10% up</i>	<b>9.7</b>	<b>13.1</b>	<b>15.6</b>
<i>More than 10% up</i>	<b>3.1</b>	<b>3.6</b>	<b>7.9</b>

## Notes

Similarly mixed fortunes appear to be the case for the coming financial year, with a majority of institutions facing another stand still budget or further cuts.

Again, academic libraries are the hardest hit, although recessionary pressures are being felt in all sectors.

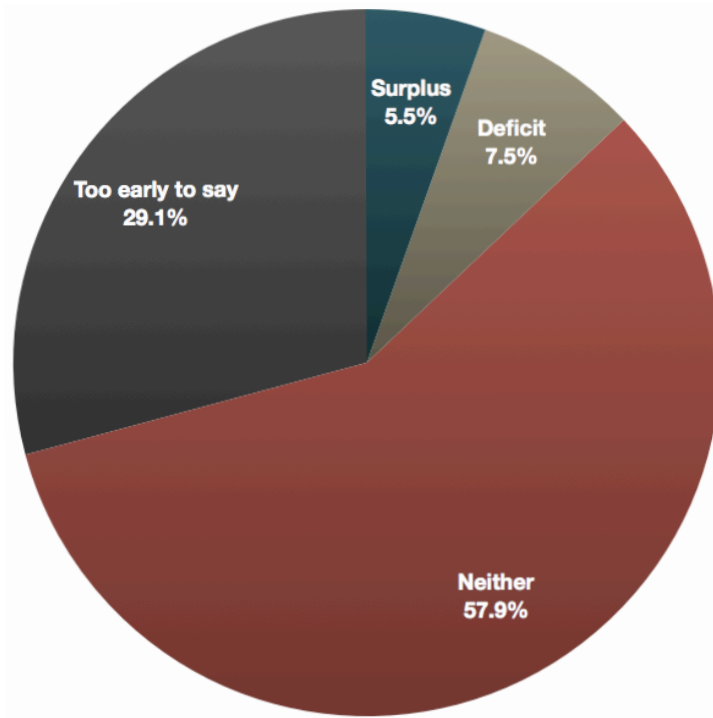
The big question, is the extent to which institutions can absorb these pressures through efficiency savings, or whether real impacts on services and resource provision are likely. That is a key question that this survey tries to grapple with.



**Further belt tightening is inevitable as we go into the next financial year for a very large majority.**

# Carrying forward a surplus or deficit?

Number of libraries



## Notes

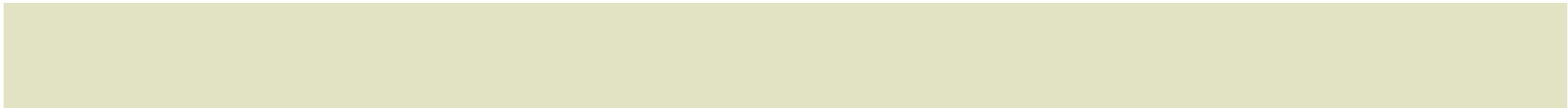
Of the relatively small proportion of libraries that expect to carry forward a surplus or a deficit into the next financial year (just 13.0% of those who were able to say at the time of the survey), there are some worrying signs. Almost half of these are carrying a deficit and for a majority, that deficit is equivalent to 15% or more of their current budget.

It is difficult to make value judgments here since we have no comparative data from earlier years and there will be very particular individual circumstances that were not captured in this survey. More research is definitely needed here, as this could become a serious issue.

**A small proportion of libraries are carrying forward a significant deficit into the next financial year.**

# Looking further forward

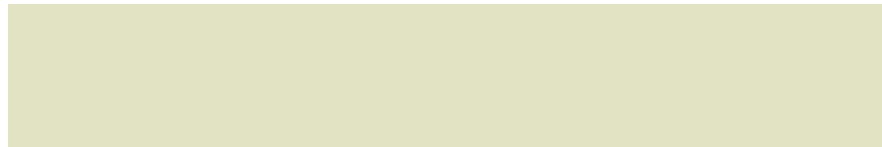
Outlook for total library budget in two years' time compared with today, ignoring inflation: column percentages



	Academic	Public sector and government	Corporate
<i>More than 10% down</i>	<b>6.9</b>	<b>13.6</b>	<b>7.6</b>
<i>Less than 10% down</i>	<b>27.4</b>	<b>13.5</b>	<b>11.5</b>
<i>About the same</i>	<b>37.4</b>	<b>43.2</b>	<b>50.0</b>
<i>Less than 10% up</i>	<b>20.6</b>	<b>19.3</b>	<b>15.3</b>
<i>More than 10% up</i>	<b>7.9</b>	<b>12.4</b>	<b>15.4</b>

**Notes**

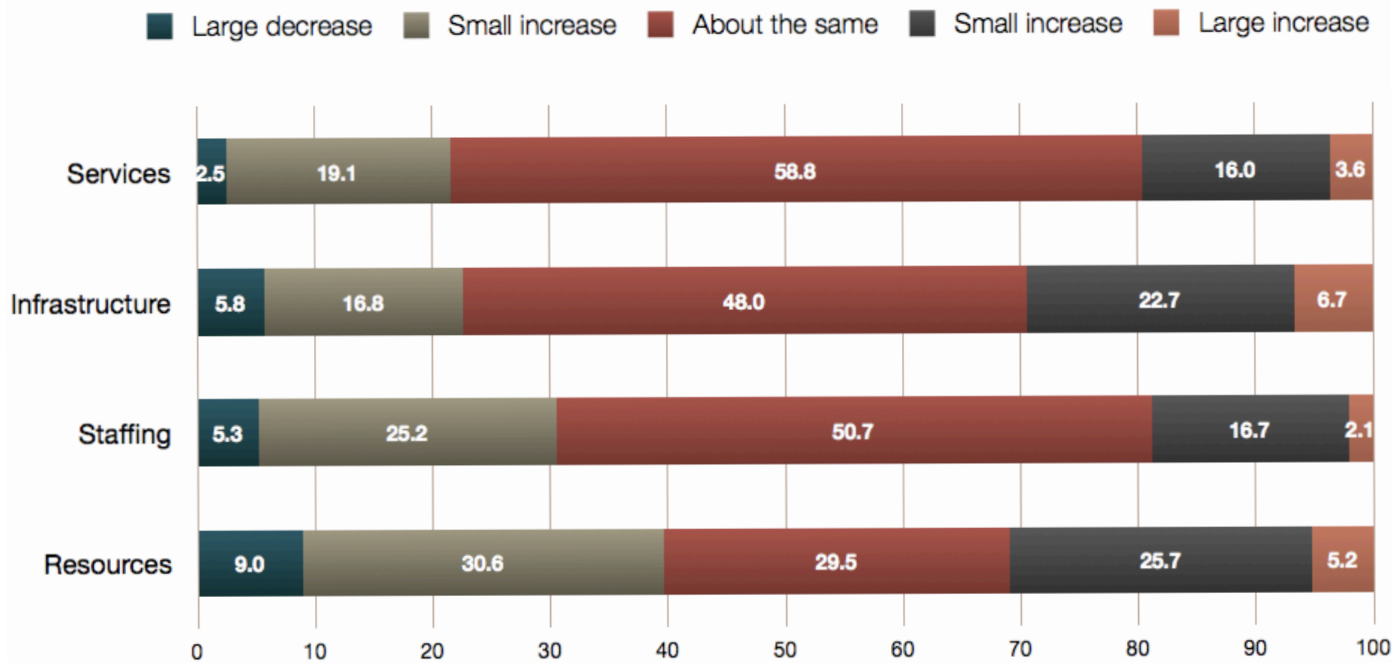
Looking beyond the next financial year, institutions are a little more optimistic about the future, although much depends of course on the direction that inflation (especially `publisher inflation`) takes over that period. Academic libraries, especially in the UK, are the most pessimistic about the short term outlook. They expect to be in a significantly worse position in two years' time than they are today. For a small minority of libraries in all sectors who anticipate budgets that are 10 per cent or more small than today, before inflation, it looks as though some serious thinking about the future shape of services and provision will be needed.



**The short term outlook for a sizeable minority of libraries is likely to go beyond efficiency savings into real cuts.**

# Changes in patterns of library spending

Projected spending on services, infrastructure, staffing and resources over the next two years



## Notes

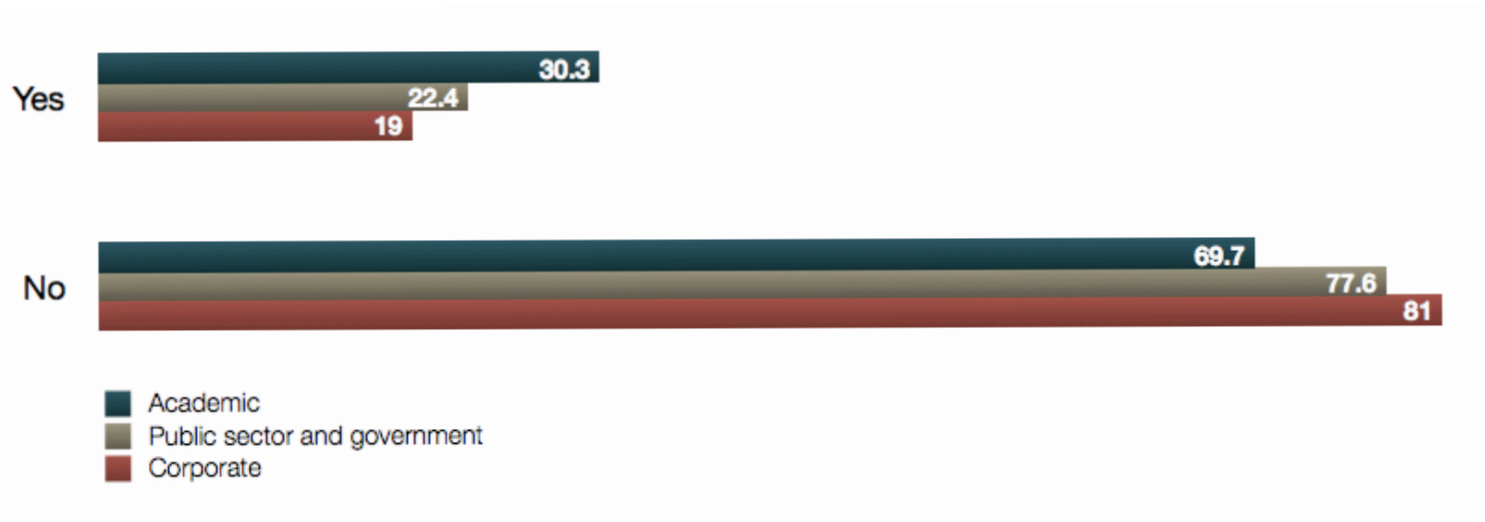
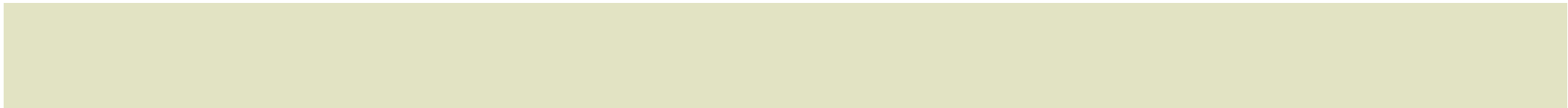
We asked institutions to best estimate how their patterns of spending are likely to change over the next two years. Their answers once again reveal a complex picture, with winners and losers in all four main spending categories.

Much of the financial pressure will be absorbed through reduced spending on information resources: 69.1% of respondents expect to spend the same or less than they do today (this amounts to a cut as the figures contain no provision for inflation). Staffing budgets also look vulnerable at many (but not all) institutions. Relatively speaking, library services and infrastructure are the most protected budget lines.

**Information resources are likely to be the hardest hit budget line, followed by staffing.**

# Staffing cuts

Percentages of institutions reporting plans to cut staff over the next two years



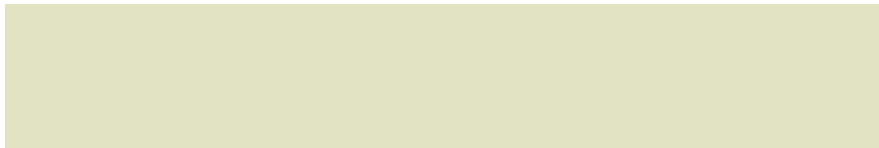
### Notes

This graphic shows responses to the question: 'Are you planning to cut personnel or staff costs over the next two years?'

For a large majority of institutions (71.7%) in all sectors, there are no plans yet to cut staffing levels, which is very good news for many hard working librarians.

The outlook for jobs is best in small libraries, libraries in the corporate sector and, more generally, for libraries in North America.

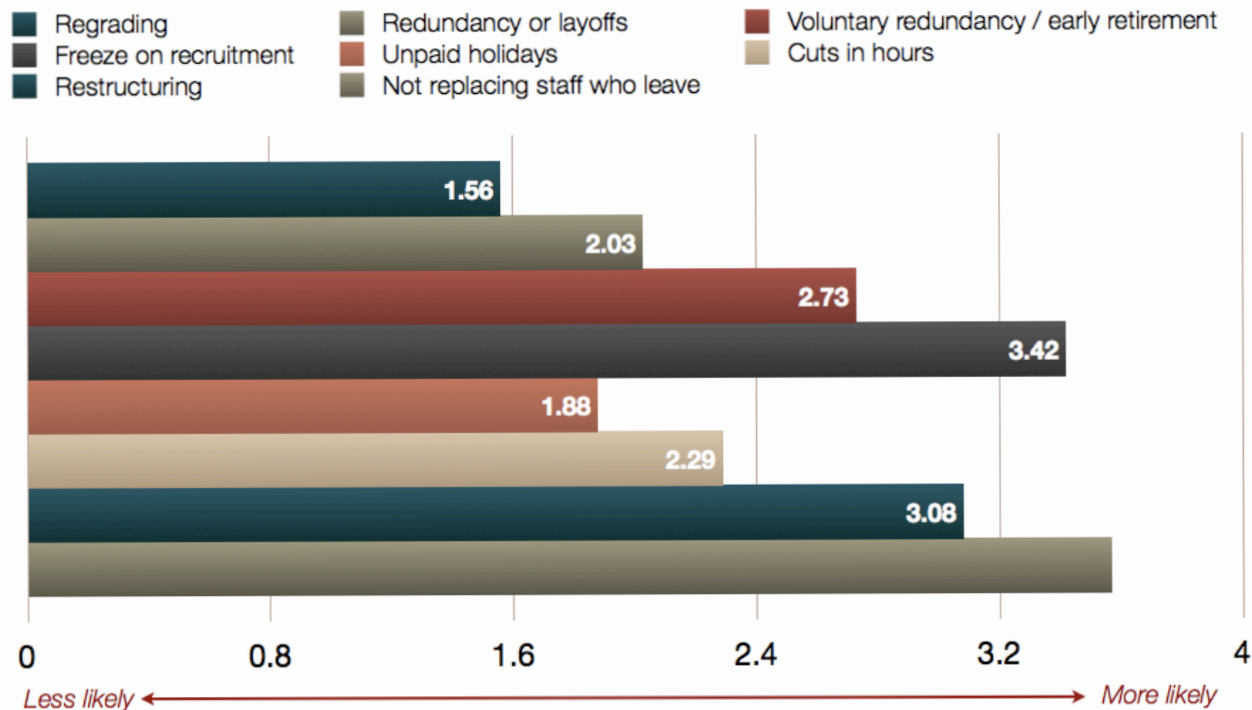
As the graphic shows, the main threat to jobs is in the academic sector, especially in the larger European (especially UK) institutions.



**Most libraries have no plans to reduce staffing, but some jobs will go, especially in academia.**

# Staffing cuts in detail

How institutions plan to manage staff cuts over the next two years



### Notes

A minority of institutions (28.3%) that say they are looking to reduce staffing over the next two years, the graphic shows the most likely mechanisms for achieving this.

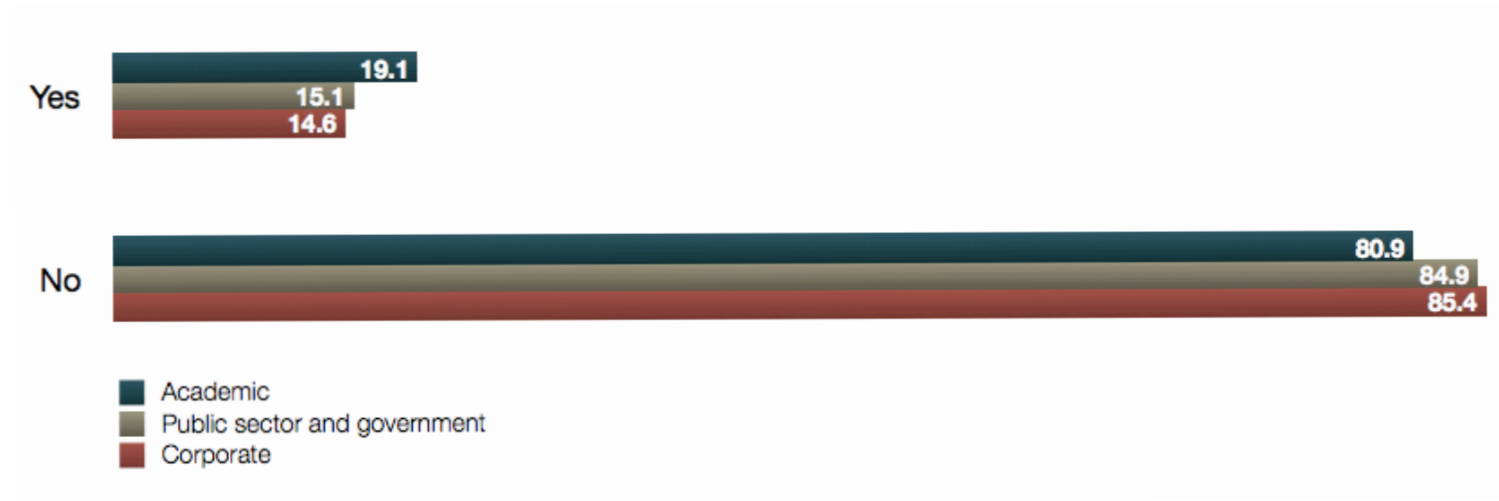
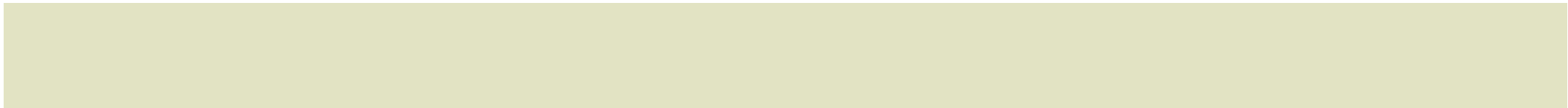
The most preferred options are a freeze on recruitment and / or not filling vacant posts, rather than more direct measures such as forced redundancy, regrading or restructuring posts.

There are many issues here, including human resources policies and national legislation, so the survey can only offer a very general picture and, we should stress again, a large majority of employers are not seeking to reduce staffing levels.

**Where jobs need to go, employers prefer to do this by freezing posts or not filling vacancies.**

# Services and infrastructure cuts

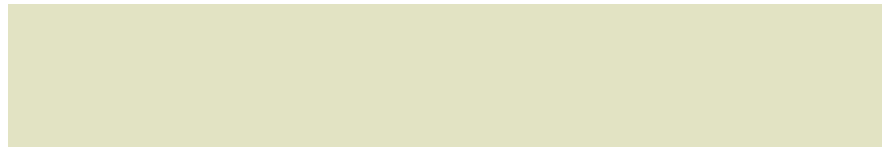
Percentages of institutions reporting plans to cut library services or infrastructure over the next two years



**Notes**

For a large majority of institutions in all sectors (81.9%), there are no plans to cut library services or infrastructure over the next two years.

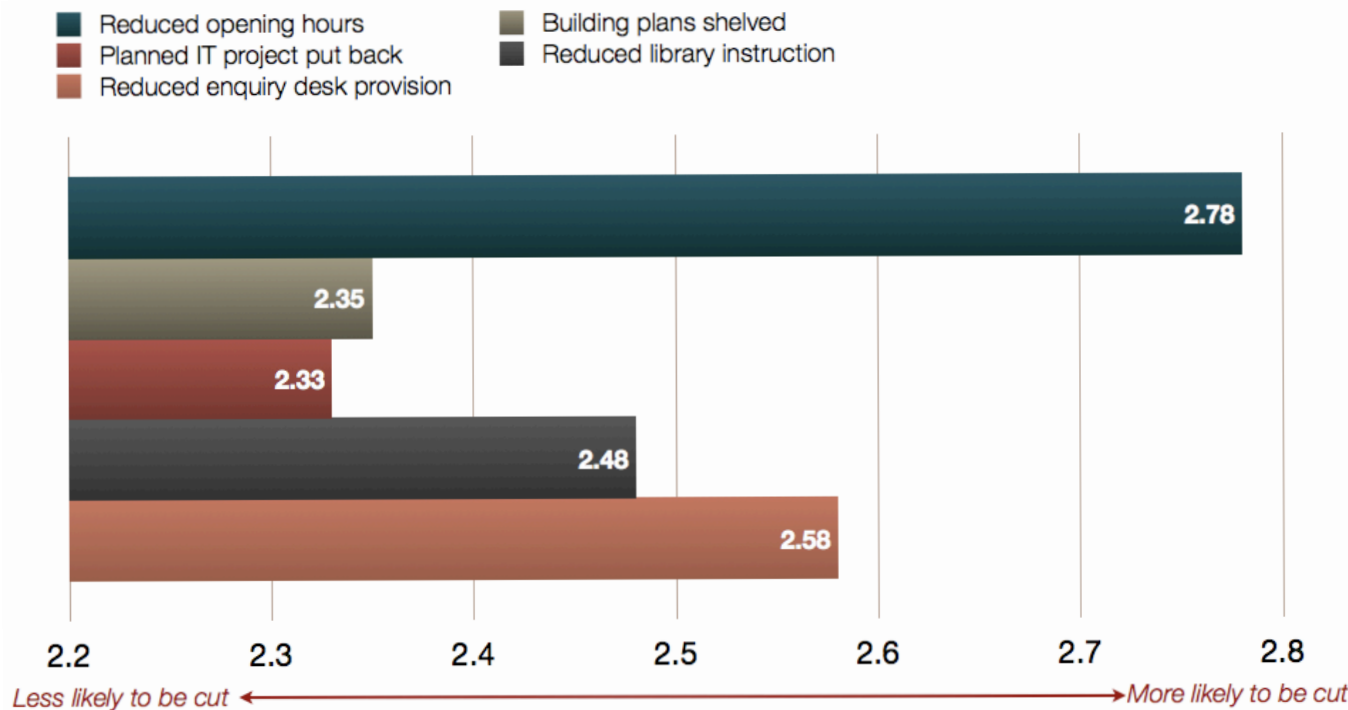
However, of those that do, there are (significantly) more in the academic sector and fewer in the corporate sectors, as can be seen opposite. As a general pattern, large libraries (26.7%) are very much more likely to be considering cuts in services and infrastructure than small libraries (5.9%), presumably because they have more flexibility in these matters. There is very little geographic variation in these responses: cuts seem to be mainly a function of size and sector.



**Most libraries are not considering cuts: those that are are mainly large and academic libraries.**

# Services and infrastructure cuts in detail

How institutions plan to manage service and infrastructure cuts over the next two years



## Notes

In those cases (18.1%) where cuts are planned, the most vulnerable services are library opening hours (by some considerable distance), followed by reduced enquiry desk support.

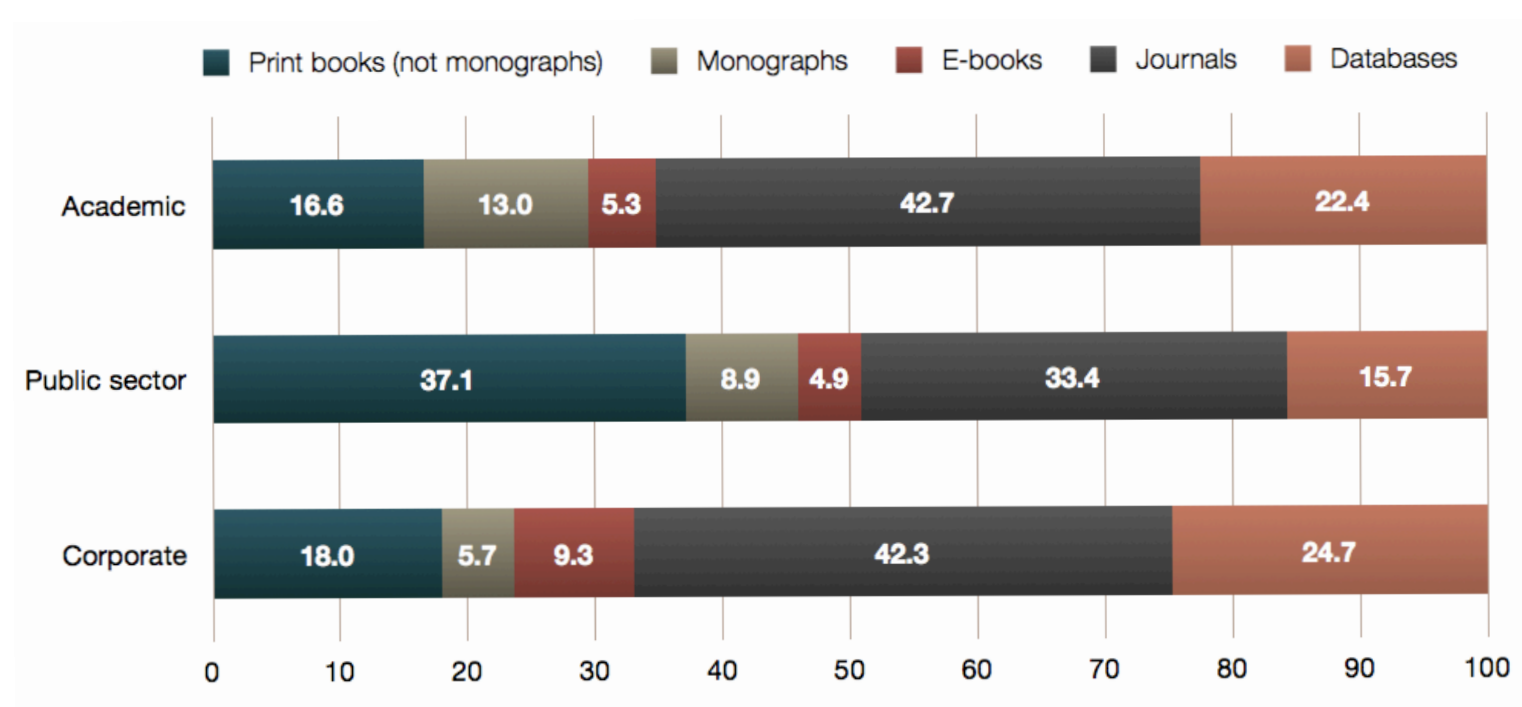
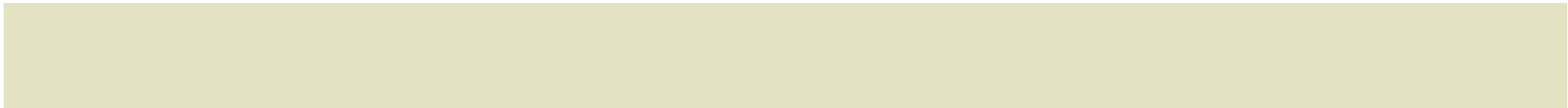
There is little geographic variation in the nature of the responses to this question, although reduced opening hours are being considered as a 'very likely' option by 41.7% of North American libraries against a world average of 37.5% (these percentages relate only to that minority of libraries that are actually planning service or infrastructure cuts). IT and building projects seem to be the least vulnerable areas for cuts.

**The most vulnerable services for cutbacks are library opening hours and enquiry desk services.**



# Information resources budgets

Current balance of expenditure on information resources

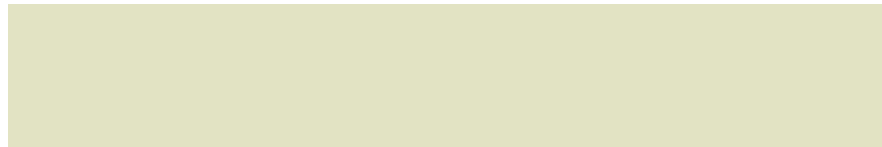


**Notes**

This graphic shows how, on average, academic, public sector and corporate libraries apportioned their spending on information resources in the current financial year.

There are clear sectoral differences, as would be expected, with journals (in all formats, print, electronic and both) occupying a central position overall. E-books currently account for a small proportion of total spend, but this figure is rising fast from a late start.

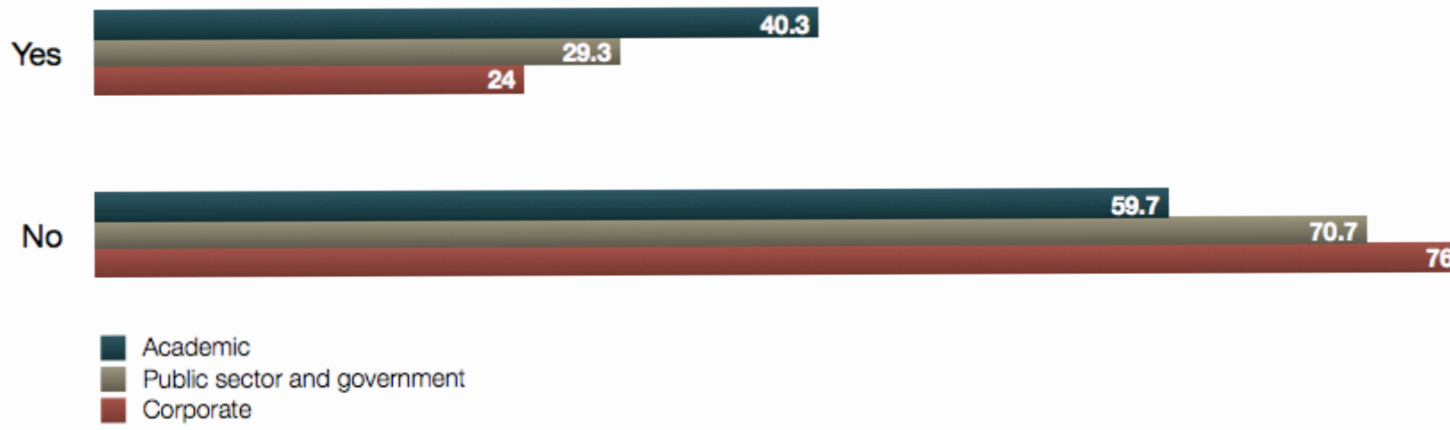
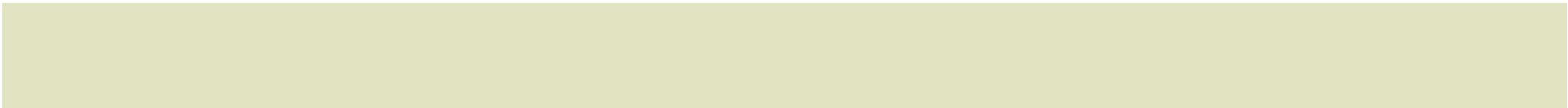
With 36.8% of the sample spending more than one million US dollars on information content, and 6.8% spending more than eight, this is a huge expenditure area.



**Information content in electronic formats consumed 57.2% of library resource budgets this year.**

# Information resources cuts

Percentages of institutions reporting plans to cut information resources over the next two years

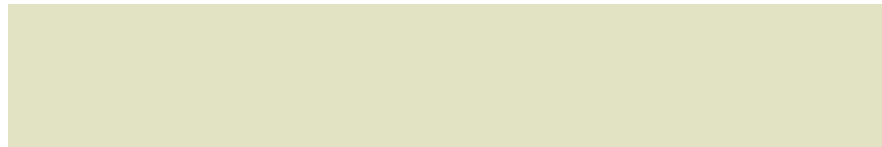


### Notes

By comparison with the equivalent findings for staffing and services, more institutions (37.4%) are actively planning to reduce their spending on information resources over the next two years.

In the case of large libraries (with more than 40,00 users), a small majority (54.8%) are planning to cut information resources, compared with only 26.8% in the case of small libraries (less than 5,000 users).

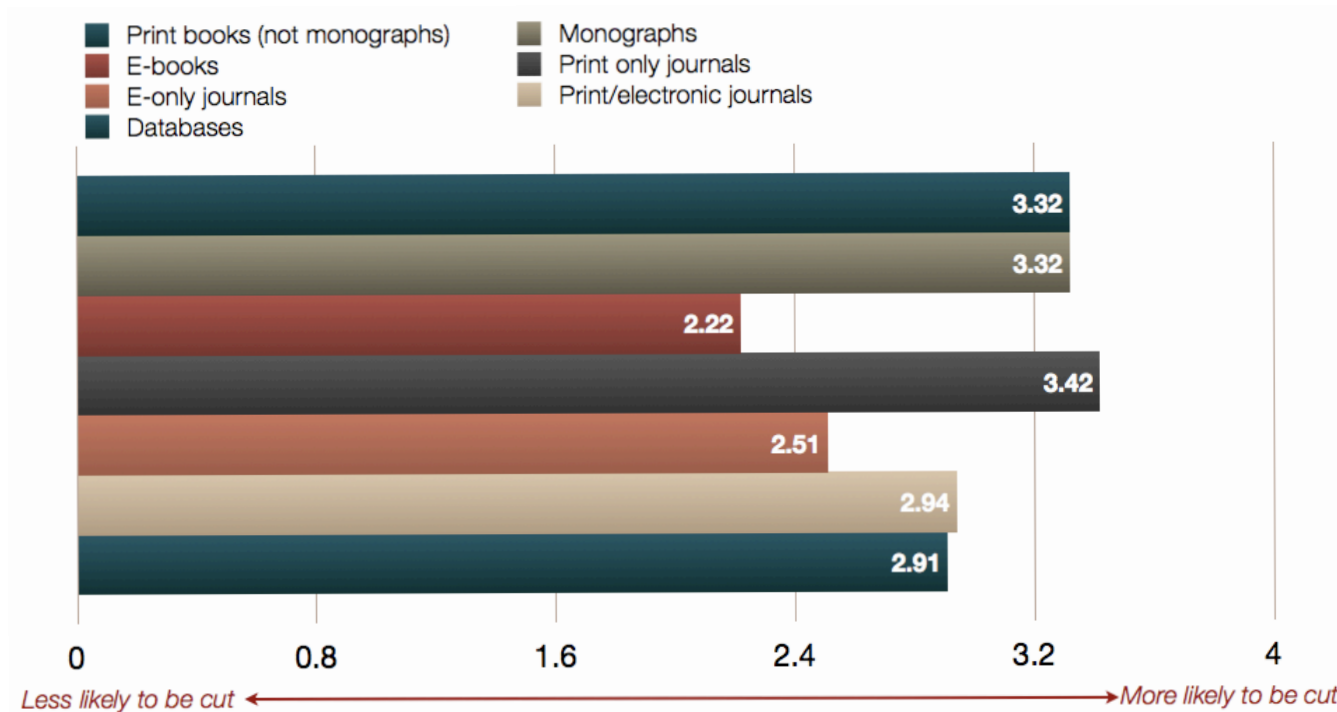
There are no clear geographical patterns here: once again, library size and sector seem to be the determining factors.



**Information resource budgets are under severe stress, especially in larger and academic libraries.**

# Information resources in detail

How institutions plan to manage information resources cuts over the next two years



### Notes

This question gauges the pressure on various types of information resource on a four-point scale where 4 is 'very likely' and 3 is 'likely'. Clearly, all formats are under pressure, especially print only journals and print books and monographs. Print formats appear to be slightly more protected in large libraries, although this is not statistically significant.

Journals in both formats and database subscriptions look fairly vulnerable, but the real story here is the position of e-books which are relatively sheltered from the coming storm, especially in corporate ( $x=1.9$ ) and public sector libraries ( $x=2.0$ ).

**Print formats are highly vulnerable targets for cost savings; the outlook for e-books is strong.**

# The cuts in summary

Percentage of institutions indicating planned cuts, by budget line and sector

	Staffing	Services and infrastructure	Resources
<i>Academic</i>	30.3	19.1	40.3
<i>Public sector and government</i>	22.4	15.1	29.3
<i>Corporate</i>	19.0	14.6	24.0
<b>All sectors</b>	<b>28.3</b>	<b>18.1</b>	<b>37.4</b>

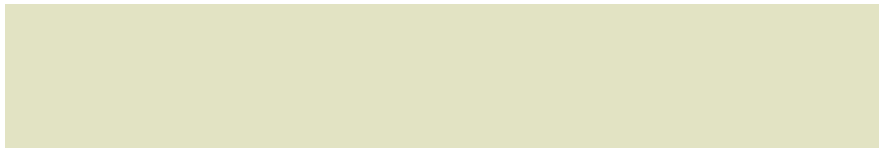


### Notes

This table shows the scale of the cuts that libraries are expecting over the next two years.

Resources budgets are likely to be very hard hit, followed by staffing.

The outlook looks tough for a significant minority of libraries, especially in the academic sector.



**A significant minority of libraries, especially in the academic sector, face two very tough years.**

## TRADE-OFF ANALYSIS

So far in this report, the respondents have been asked to consider each issue in turn, independently of other questions in the survey. In this next section, we look at how much weight librarians attach to some big strategic issues based on a trade-off analysis.

When consumers make a purchasing decision, for example when buying a new car, they have to weigh up a lot of different issues in their mind. Some features of a car, like engine size, brand or price, will weigh very heavily for most people. Other factors, like an in-car DVD or satnav system may be fairly important or fairly marginal, depending upon the individual's priorities. Other factors, like the colour of the upholstery may scarcely register at all with some

people (but not all). These preferences that underlie a purchasing decision can be modeled. On a scale of 100, it is quite probable that most consumers would rate engine size very high, and give upholstery colour a very low weighting.

Trade-off analysis is a method for attaching a numerical preference score to the different attributes of a decision process in complex situations like this. It was achieved in the survey by asking people to choose their most favoured and least favoured solution in a given situation (Max-Diff analysis), thus effectively ranking the components in preference order. Preference weights can be extracted from these rankings mathematically.

The graphics that follow show the preferences of senior librarians when weighing up the options. The numbers are abstractions without associated units. They add up to 100 for the sake of convenience. They are **not** percentages of individuals that 'voted' for a single solution. They offer an insight into a decision making process by a large group of survey respondents and show the relative weighting that they put on the key issues.

# Making cutbacks

Trade-off analysis: preference scores



## Notes

Our survey respondents were asked the question: 'Which of these three options is likely to be the most effective, and which the least effective, to help you in managing your budgets in the current economic climate?'

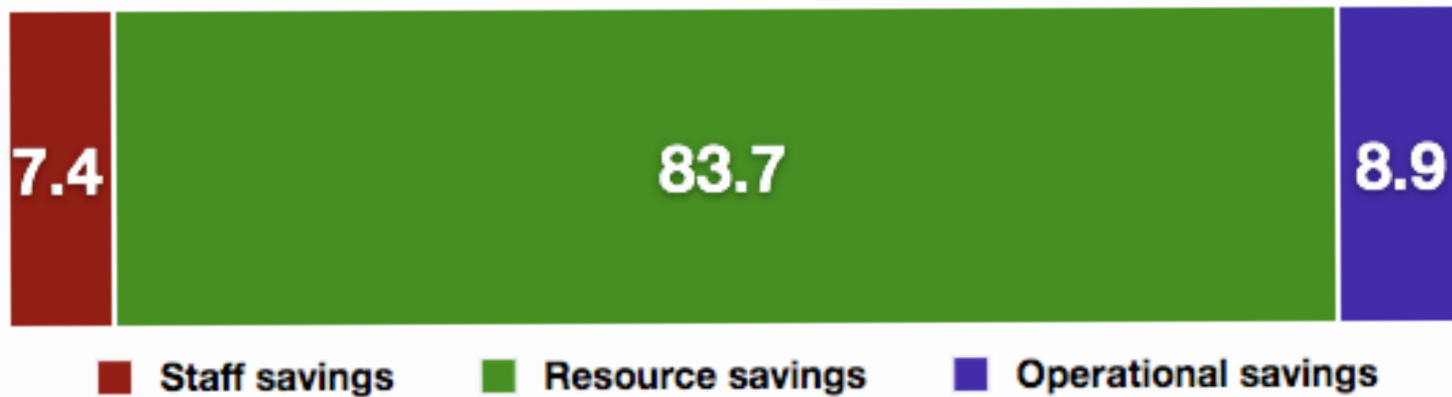
This is not an easy question to answer, since everyone realises that cutting back on staffing or resources is likely to have a big impact on services. Similarly, by cutting in one area, pressure is relieved in others.

The combined view of the survey population is that, on balance, cutting resources is almost twice as likely to be effective than cutting staff.

**Backs to the wall, librarians' key instinct is to cut resources, even services, to protect staffing.**

# Greater library co-operation

Trade-off analysis: preference scores



## Notes

Greater co-operation between libraries is one of many potential strategies for helping to identify and deliver savings.

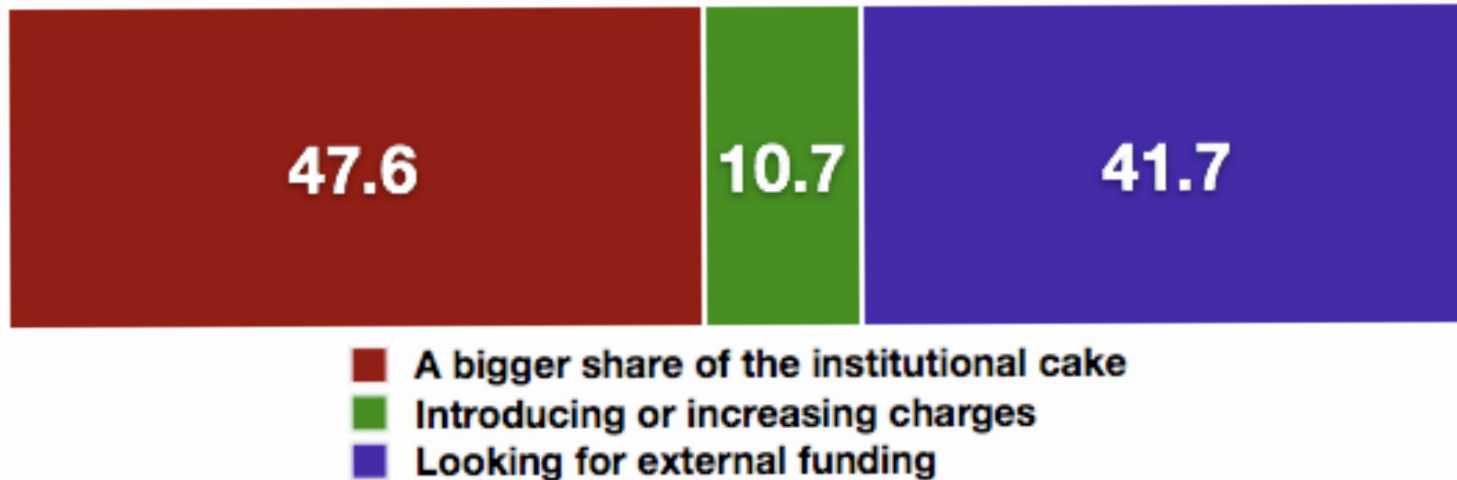
Librarians clearly associate library co-operation with resource savings, through the scope that offers for sharing scarce information resources. There is little identification with co-operation as way of saving on staffing or operational expenses.

This idea (resource savings) carries particular weight in North America than in the rest of the world, and in the academic library sector.

**For academic libraries in particular, greater co-operation has strong potential for resource savings.**

# Sources of additional funding

Trade-off analysis: preference scores



## Notes

Librarians have limited time for developmental work, so the question of which levers to press in an attempt to bring more money into the library is a difficult one. The perception of the survey panel is that user charges offer only a very small part of the way forward and that energy is better expended elsewhere.

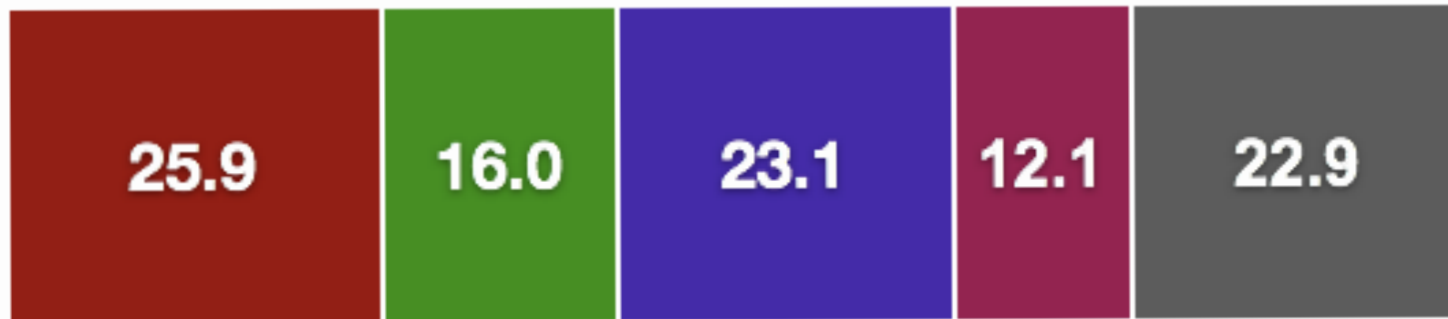
The instinct of librarians in North America is to look externally for new sources of funding. Librarians in the rest of the world, especially the UK, and those in small libraries across the world are much more likely to believe that lobbying for a greater share of their institution's total budget is likely to be more effective.

**Librarians do not perceive that user charging is an effective mechanism to balance the books.**



# Digital purchasing options

Trade-off analysis: preference scores



- Digital collections
- Individual titles from publishers
- Individual titles from vendors
- Automated book vendor approval plans
- Patron-driven access model

## Notes

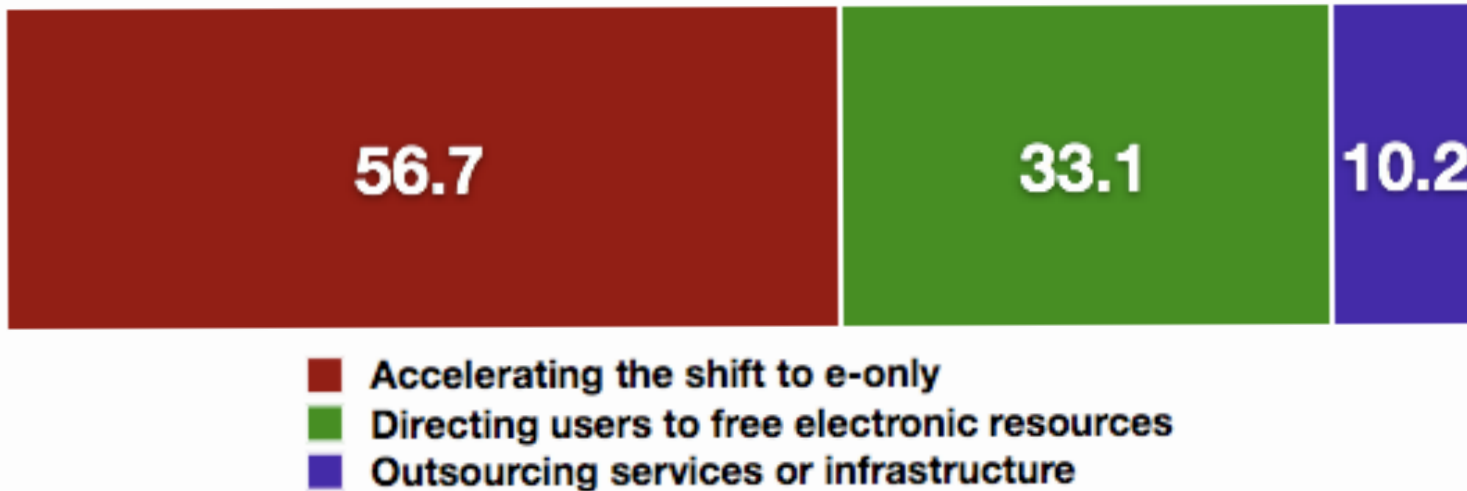
Vendors are experimenting with different business models for electronic content, sometimes to a bewildering extent.

The data here strongly suggests that there is no 'one size fits all solution' to be had. Indeed, a complex ecology of business models is likely to emerge. For example, although the survey panel as a whole attaches the greatest preference to subscribing to digital collections and least to automated approval plans, this pattern is reversed in the case of small libraries. Patron-driven access is favoured among public sector and corporate librarians, who dislike digital subscriptions. This is highly volatile territory!

**Librarian's preferences for one digital purchasing model over another are very complex.**

# Doing things differently

Trade-off analysis: preference scores



## Notes

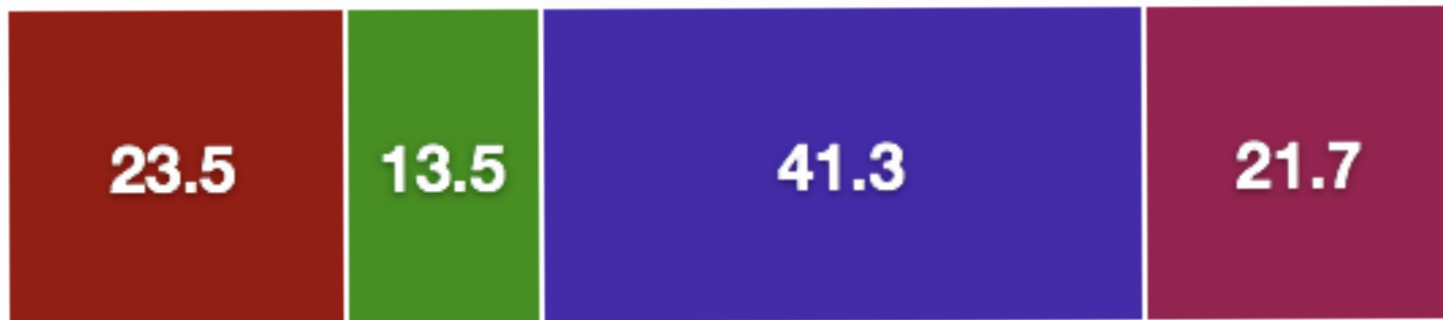
This report has highlighted some of the financial challenges confronting libraries in the downturn and identified some of the key pressure points. But the survey contains many positive messages as well, not least a real appetite for change.

The transition to an increasingly digital library experience is something that many see as an effective response to financial challenges: especially in academic libraries (much less so in the public and government sector). Free electronic content is attractive, especially in regions outside of North America and the UK. There is little interest or appetite in outsourcing in any sector or geographical territory.

**Librarians reveal a strong preference for fast forwarding their users into the digital library.**

# Smarter management

Trade-off analysis: preference scores



- **Getting a better understanding of costs**
- **Better benchmarking and PIs**
- **Demonstrating value through better usage and outcomes data**
- **Greater pressure on vendors**

## Notes

The budgetary strictures facing many libraries are undoubtedly severe, but they can be managed and contained. In this question, we explore some of the directions that 'smarter managers' might go in.

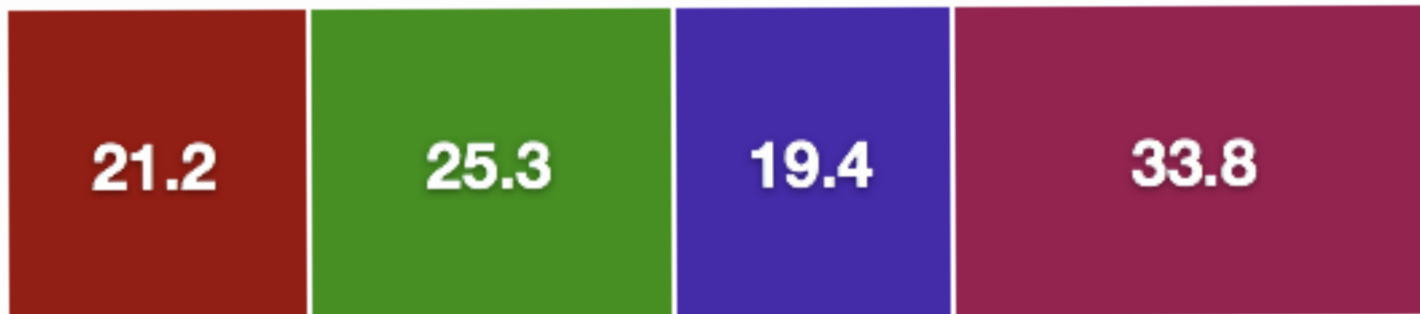
Despite the fact that performance indicators and benchmarks are widely used and in a relatively advanced state of development, they do not score highly (too much data and not enough meaning?), especially among North Americans.

The senior librarians who responded to this survey recognise a new reality: the need to measure value through better usage and outcomes data, not just activity. These are very different concepts.

**Library managers recognise a need to go beyond measuring activity to demonstrating value.**

# Balancing the library budget

Trade-off analysis: preference scores



- Making cutbacks
- Greater library co-operation
- Seeking additional funding
- Doing things differently

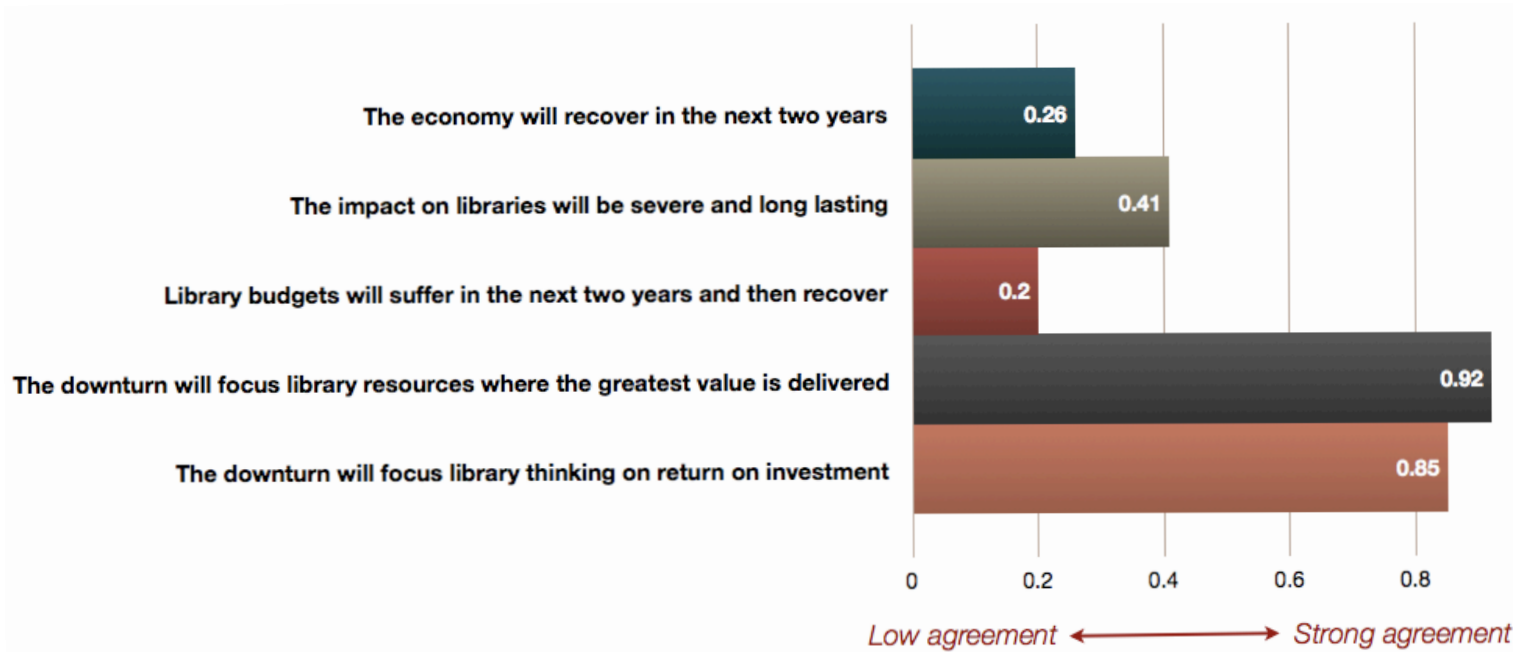
## Notes

The final page in this section offers a synthesis of previous slides. Faced with a complex and changing environment, what do library managers see as the best way forward? Interestingly, the most effective strategy is perceived to be to make big changes, retooling libraries for the digital age. Library co-operation is also seen as a powerful mechanism for riding out the economic storm.

Cutbacks and economies are inevitable, but the positive message of this finding is that library managers are thinking much more broadly and constructively. Making cutbacks is just one small part of that armoury.

**Library managers are keen to adopt new forms of working more suited to the digital age.**

# Views of librarians



## Notes

At the close of the survey, we asked library managers to react to a series of provocative statements.

Their answers show reasonable levels of agreement, by geographic region, size and sector. Again, library managers took the opportunity to accentuate the positive: the downturn is as much an opportunity as a threat and is likely to focus minds on value and return on investment.

The statement where there was the sharpest division was that managers outside of North America, especially in the UK, were much less optimistic that library budgets would recover in the medium term.

**Once again, library managers emphasise the need to focus on value and return on investment.**

## IN THEIR OWN WORDS 1

We conclude with some interesting comments, straight from the library managers themselves.

*Barriers in moving to e-only, particularly VAT on e content, are continuing to have a negative impact on the ability of library managers to deliver cost effective access to digital content and to lever wider efficiencies through a step change in how we access and use content. Current financial models in relation to the acquisition of journal content are unsustainable and must be revised in the light of emerging open access models. Higher education budget managers at institutional level will not continue to fund year on year over inflation increases to journal and database subscriptions indefinitely and*

*when they finally pull the plug we will be in real trouble [Large public university library, UK].*

*It seems to me that libraries will become more important during these days of cutbacks and efficiency/effectiveness measures, not less so [Small high school library, USA].*

*Value to society, a school or a community is not always measurable in dollars. Often things are valuable because they enhance life and provide a place where information is not just shovelled at individuals but they are led to discover for themselves. Libraries and librarians enrich our society [Small university library, USA].*

*Like businesses, the libraries which have a good handle on why they exist and core values are the ones most likely to emerge in a very strong position [Small for profit corporate library, USA].*

*The government here has to input money in order to get outcomes. Here, libraries are NOT CONSIDERED cutting edge and thus much investment are not placed in them. If they invested seriously, they WOULD get returns. The voices (like mine) who echo the importance of libraries are ignored and the fight goes on... Our government need to GET SERIOUS!! [Medium secondary school library, Antigua].*

*Library and other academic professional organizations must continue to put pressure on vendors or database companies that charge outrageous fees and refuse to participate in consortial pricing [Small private university library, USA].*

*Vendor pricing models are too inflexible, and every vendor should give customers choices in price models up-front [Small university library, USA].*

*I think the best thing for librarians to do is be able to adapt to changes. Being able to adjust and think differently will allow libraries to be not necessarily be traditional but 'long lasting' [Small not for profit corporate library, USA].*

## IN THEIR OWN WORDS 2

*Libraries are good at collecting statistics, but not at measuring outcomes. We need methods to show that the resources we provide make a difference to our users and that is not easily captured [Medium public university, USA].*

*Libraries we all grew up with are no longer sustainable. This trend was taking place before the current budget crisis. Each year library budgets are flat or are going down. In academic libraries administrators have made great cases for more funding, but the bottom line is giving as much funds for direct instruction and this includes faculty, part-time adjuncts, instructional equipment, etc. In most cases libraries*

*are excluded from these priorities. Libraries have to raise their own funding and start using the open source scholarly sites and the open courseware initiatives and work closer with faculty on developing resources that will tie directly to classes rather than building collections that may or may not get used [Small public university library, USA].*

*We need easy access to GOOD statistics on use - we need pricing to be realistic and more 'real' - if I go buy a journal in a store it is one price. I buy one journal title there is normally A price. I buy a database, a few journals, etc. we barter and bargain... I'd rather there were a 'real' price - affordable for ALL or expensive for all. The biggest places sometimes pay less than we do*

*for the same items... Frustrating [Small public university, France].*

*I think the problems with library budgets are more than just current economics, it's really about fitting in to a new world. I still optimistically think we can adapt and show our value. So I don't think the impact will be long lasting - although it may be severe [Small public library, USA].*

*Libraries need to clearly demonstrate that they are effectively supporting the university's priorities. For too long libraries have followed the desires of the deans and believe that they should focus on the fringes of information resources collecting and housing unused materials of little value. There is too much duplication of holding.*

*Libraries should figure out to collaborate more in areas such as reference, instruction, etc. where it was impossible to do so in the non-digital world [Medium public university library, USA].*

*There is no doubt that the best way for libraries to overcome the current economic crises is by consortiums. If vendors were to take the initiative and aggressively sell consortiums to libraries, be it academic, special, school, etc. the savings and the benefits would far outweigh any budget cuts through personnel or services or collections [Small secondary school library, Kuwait].*

## IN THEIR OWN WORDS 3

*We are in a difficult position. The thought used to be that we were building collections, not just for today but also for future use. The budget squeeze has put a crimp on that notion and becoming `patron use-driven seems to be the new paradigm. Have our roles changed? And will we change the way we build our collections? I don't know [Small public university library, USA].*

*Co-operation in cataloging and other services that can be shared saves a tremendous amount of money. Other co-operative ventures can also provide more resources at a savings for libraries. For example, shared collections - but not sharing in the sense that everyone buys the same thing - let each library*

*buy what they need and then share the entire collection. Vendors and publishers need to be as flexible and creative in their thinking as libraries are having to be [Medium public university library, USA].*

*Give presentations to senior management on how libraries can save time, money etc. in information retrieval, licence negotiations etc. Embed library staff in policy units to use their skills to access relevant information, produce policy reports, etc. [Small government library, UK].*

*Libraries are generally more interested in impact/outcome measurement at the moment than value measurement; rightly in my view. There is an opportunity here to get back to*

*promoting the real value of libraries, rather than engaging in a bout of short term hysterical overreaction to budget pressures. Many libraries in the past have tended to choose the wrong options for savings/efficiency gains because of poor strategic analysis [Medium public university library, UK].*

*The no growth budget has forced us to move in cheaper directions, going electronic where possible, cutting journal titles that seem less essential now, and working through our consortium for better pricing. Vacant jobs have gone unfilled so all are doing a little more to make up the difference both in technical services as well as public services [Medium university library, USA].*

*We seem to be able to collect a substantial amount of information about how much a book or database is being used, but I doubt that we will soon (if ever) be able to determine how well a resource is serving (or is being used by) our users. I am guessing that the effort would encounter too many complexities [Small not for profit corporate library, USA].*

*Keeping accurate and relevant statistics has proved successful in arguing for the retention of library services and demonstrating value for money [Small government library, New Zealand].*



## IN THEIR OWN WORDS 4

*Calculating cost per use of resources works for me - if an online journal costs \$1,500 a year but 300 customers use it, the ROI is great: cost per use is \$5. I cancel subscriptions to online journals if the cost per use goes up over \$20. Any means by which the library can demonstrate how library services enhance the productivity of others in the organization is a win [Small hospital library, USA].*

*There is very little research that shows library impacts on student success especially in the post-secondary sector [Small public university library, Canada].*

*I think libraries need to become much more focussed on evidence-based*

*management practices so that they can demonstrate their value and the return on the institutional investment. I also think that libraries need to become much more aware of the importance of marketing as users increasingly get content without seeing the role of the library in acquiring that content e.g. when searching the internet. Finally I think libraries need to become more competitive in a commercial sense since we are now in a competitive environment [Small public university library, UK].*

*The best outcome is if library users are made fully aware of financial problems and offered alternative possibilities, so that perceptions of library value are not debased. We need to ensure that users receive the best service possible in*

*difficult times and ensure that we have feedback from them to which we also respond. One would hope that a tighter economic climate would persuade more libraries to co-operate to their mutual benefit [Large public university library, UK].*

*We see maintenance of current personnel and service levels as critical in this second year of extreme budget cuts (45% in resources, 33% in personnel, from 2007/08's initial budget figures). The single figure budgeted for purchase of resources--although they are of many kinds and support the entire academic activity of the college--makes it a tempting target for administrators looking for large fund balances to cut or transfer [Medium community college library, USA].*

*I believe a clearly defined mission statement and operating procedures will aid in avoiding excess expenditures during times of economic hardship. Anything that does not directly relate to the mission of the library and/or parent institution is expendable until such a time as additional funding is available [Medium public university library, USA].*

*Need to change, be proactive, respond to user needs. The quiet, book lined library is dead, long live multimedia. Need to have a virtual presence in our users' lives, be accessible on the move, in a pop up window whilst they chat on MSN, enquiries by text. This means staff must be mobile app savvy and flexible [Small further education college library, UK].*

## IN THEIR OWN WORDS 5

*The environment in which libraries operate in Nigeria is depressing in that funding meant for information resources has to be reduced in order to accommodate the generation of electrical power; a resource which is taken for granted in other nations. To make for this gap, there is the need for libraries to bond together and share resources in the areas of personnel, joint acquisition, ICT infrastructure, etc. [Medium public university library, Nigeria].*

*Think we still have some way to go in proving the difference library resources can make to student learning. If students and academics value us and what we deliver they will make the case for us if we come under threat. Need*

*more research into how our input gives students a better quality of learning experience and enables higher grades. Perhaps there should be more investigation into how academics expect students to use reading lists across the different disciplines and how much that engagement with research is reflected in assessment marks [Medium public university library, UK].*

## RESEARCH DESIGN

This survey had input from nearly 200 librarians from around the globe, all keen to share knowledge and experience of what the current economic outlook means for them and their users. CIBER designed the questionnaire on the basis of this feedback and distributed email invitations to just over 10,000

individuals, asking them to co-operate with their colleagues so that only one response per institution was returned. Three pilot rounds were completed before the survey went live, using SurveyMonkey Professional, in October 2009. We are grateful to ebrary, YBP Library Services, the Charleston Conference and to Sconul for making their mailing lists and expertise available.

The institutional, rather than individual, nature of the responses to this survey make it very difficult to quantify response rates, but CIBER's estimation is that the effective response rate for this survey is in line with industry norms for online interviews, probably in the range 6-8 per cent of those *institutions* surveyed.

THE ECONOMIC DOWNTURN AND LIBRARIES

# Survey findings

