

**THE CONDITION OF U.S. LIBRARIES:
ACADEMIC LIBRARY TRENDS, 1999-2009**

[Prepared December, 2009 for ALA Senior Management and Unit Managers]

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About the Report

The full report – *The Condition of U.S. Libraries: Trends, 1999-2009* - highlights US economic trends (2009) and summarizes trends in public, school and academic libraries during the current decade for: Number of Libraries and Population Served, Expenditures, Staffing, and Services. The compilation was prepared in December 2009 for the staff and member leaders of the American Library Association to support its planning activities.

This report is excerpted from the full report and presents the economic landscape and detail about academic libraries.

Data about academic libraries are derived from national surveys administered by the National Center for Education Statistics (NCES) (<http://nces.ed.gov/surveys/libraries/>). The academic library survey is biennial and respondents are from the “universe” of eligible institutions (all degree-granting and receiving federal financial support).

In addition, a brief overview of the 2008-2009 economic downturn and its impact on state fiscal planning are provided.

America values its libraries

The American Library Association (ALA) conducts surveys of the public at various intervals to understand household use of public libraries and perceived value of public, school and academic libraries. Most recently, in a January 2009 telephone household survey, KRC Research¹ found that:

American households reported using their public libraries more often in 2009

- 25.4 million Americans reported using their public library more than 20 times in the last year, up from 20.3 million households in 2006.
- The average number of in-person public library visits rose to 12.7 in 2009 from 9.1 in 2006.
- Use of the public library by computer (from home, work or school) doubled from 2006 to 2009 (6 times per year, up from 2.9 times in 2006).
- 22% of Americans visited their public library by computer from home, office or school more often in the last 6 months. This percentage may seem low, but it is about 51 million Americans.

After borrowing library materials, Americans rank entertainment (35%) and educational purposes, such as for homework or taking a class (28%), as the top two reasons for using the library. That's more than 145.8 million Americans.

The value of libraries to American households is unquestioned. A survey conducted in 2009 by KRC Research for the ALA found that

- More than 217 million Americans agree or strongly agree that the public library improves the quality of life in their community. This is an increase from 209.8 million reported in 2006. (KRC 2009)
- More than 222 million Americans agree or strongly agree that because it provides free access to materials and resources, the public library plays an important role in giving everyone a chance to succeed. This is an increase from 216.6 million reported in 2006. (KRC 2009)

When asked about school libraries

- 97 percent of Americans agree (224.5 million) that school library programs are an essential part of the education experience because they provide resources to students and teachers.
- 96 percent of Americans agree (222 million) that school libraries are important because they give every child the opportunity to read and learn.

¹ <http://www.krcresearch.com/default.htm>

- 92 percent of Americans agree (213 million) that school library programs are a good value for the tax dollar.

When asked about academic libraries

- 95 percent of Americans (220 million) agree that college and research libraries are an essential part of the learning community.
- 97 percent of Americans (224.5 million) agree that college and research libraries connect users with a world of knowledge.

The economic downturn: an overview

The economic downturn that began in 2008 has had significant impact on public and private institutions, among them libraries. The full impact is difficult to articulate and the data challenging to assemble. What we do know is that flat funding has been an obstacle – perhaps even a chronic problem - for many libraries this entire decade. A 2006 ALA survey exposed the level funding trend, with public libraries reporting that level (flat) funding had been a challenge as early as 2003.² A 2009 survey conducted as part of the *Public Library Funding & Technology Access Study* revealed a worsening of library funding – about 20 percent reported flat funding continuing in FY2010 and a majority reported budget reductions, about 20 percent reported 5-to-10 percent reductions in FY2010 from FY2009.

As communities and academic campuses develop future fiscal plans it is clear that public, academic and school libraries are visibly hard hit. In fall 2009 report prepared by the Center on Budget and Policy Priorities, 34 states had reported cuts to higher education, which will impact academic libraries and 25 states had cut funding to K-12, which will impact school libraries. Many organizations and government agencies are grappling with the impact of the economic downturn and a few reports are of particular note.

A recent report from the Center on Budget and Policy Priorities, a non-partisan organization focusing on policy affecting low- and moderate-income families and individuals, issued a series of reports in October 2009 regarding state budget reductions and projected mid-year shortfalls in 2010. Two reports of note include:

- An Update on State Budget Cuts: At Least 41 States Have Imposed Cuts That Hurt Vulnerable Residents; Federal Economic Recovery Funds and State Tax Increases Are Reducing the Harm. Nicholas Johnson, Phil Oliff, and Jeremy Koulish (October 20, 2009) <http://www.cbpp.org/cms/index.cfm?fa=view&id=1214>
- Recession Continues to Batter State Budgets; State Responses Could Slow Recovery. Elizabeth McNichol and Nicholas Johnson (October 20, 2009) <http://www.cbpp.org/cms/?fa=view&id=711>

The following slides present the number of states reporting budget cuts by the group or sector impacted, including

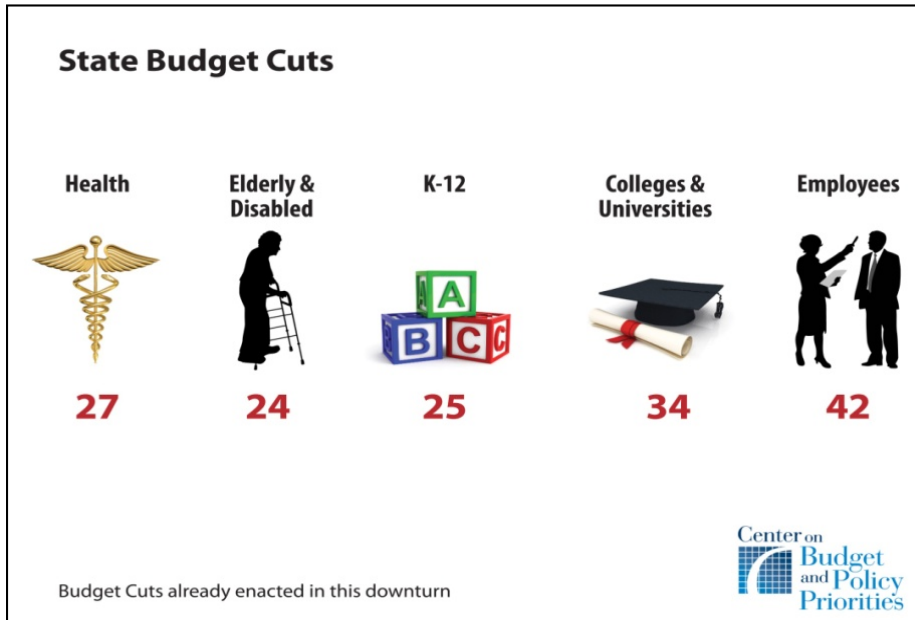
- health
- elderly & disabled
- K-12
- colleges & universities
- employees

and are excerpted from a presentation made by Phil Oliff and Mike Leachman of the Center on Budget and Policy Priorities and were distributed through a Committee for Education Funding (CEF) ALERT, “Center on Budget and Policy Priorities (FCM Notes)” (2 November 2009).³ All slides are the property of

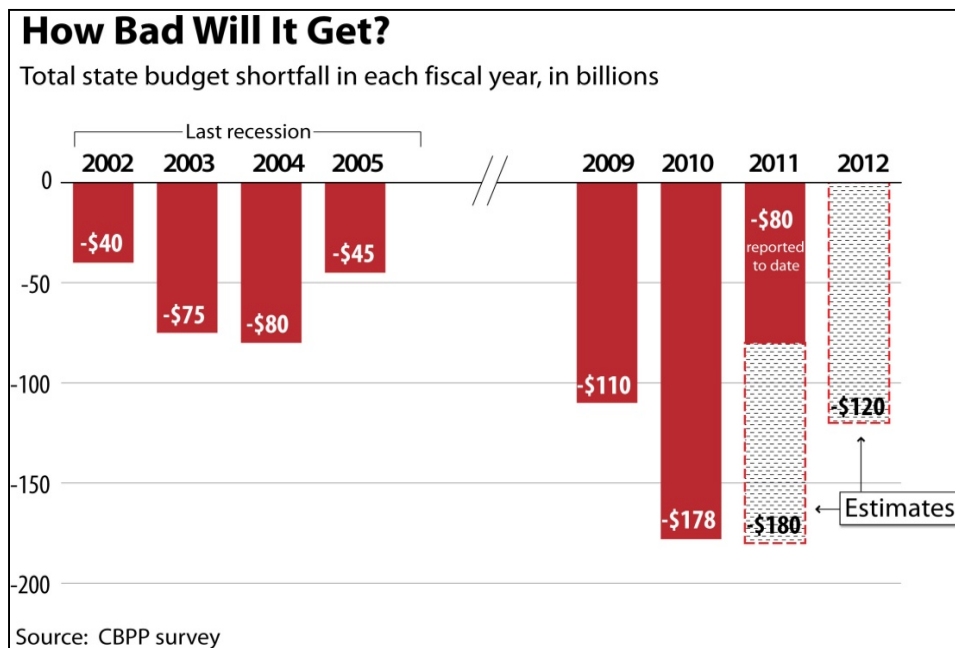
² (<http://www.ala.org/ala/research/librарystats/public/fundingissuesinuspls.pdf>).

³ The Committee for Education Funding (<http://www.cef.org/>) is a member organization working to improve federal funding for the US education system.

the Center on Budget and Policy Priorities (<http://www.cbpp.org/>) and links to individual slides are noted as available.



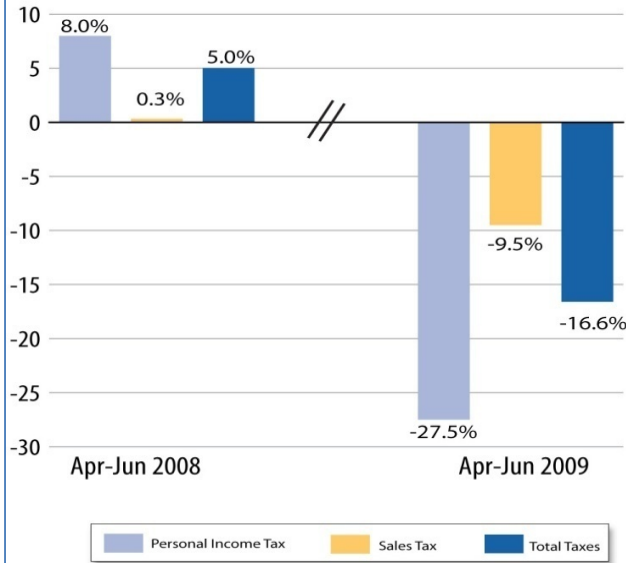
Source: (CBPP 2009) <http://www.cbpp.org/cms/index.cfm?fa=view&id=1214>



Source: (CBPP 2009) <http://www.cbpp.org/cms/?fa=view&id=711>

State Tax Revenues are Falling.

Percent change in April to June state revenue collections, 2007-2008 and 2008-2009.

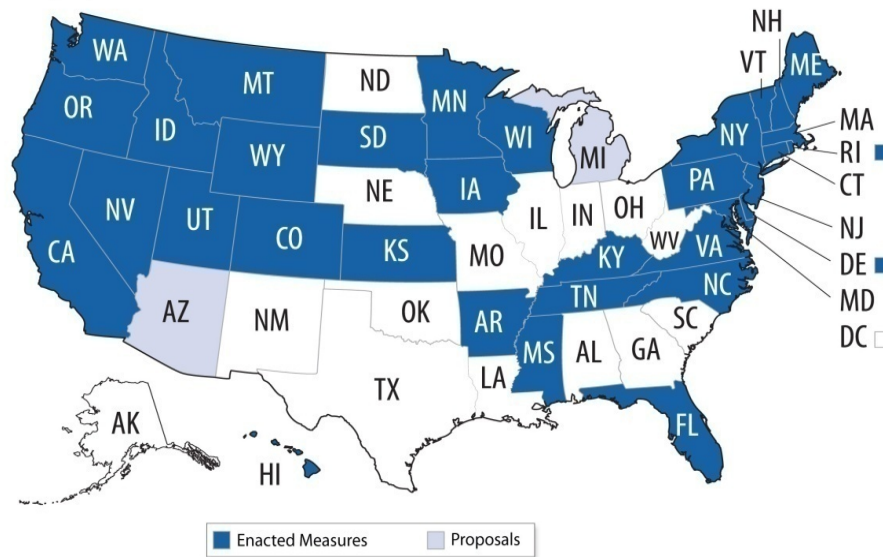


Source: The Census Bureau.



2009 State Tax Increases.

Lawmakers in 35 states have enacted or are considering proposals to increase taxes and fees.



Note: Status as of October 14, 2009.

Source: (CBPP 2009) <http://www.statefiscal.org/>

Summary of Library Trends

Understanding the condition of libraries is critical to interpreting the impact of the current economic downturn for communities, states and the nation. The charts and graphs that follow present the most currently available national trend information for academic libraries. Figures are presented as whole numbers, percentages are up to two decimal points, and rounding may have occurred. Since the periodicity of the national surveys varies, data for each type of library reflects the fiscal year(s) in which data were reported (fiscal year or school year) and may not intersect chronologically. Each section includes charts/graphs for:

(1) Numbers of Libraries and Populations Served - Basic metrics about the library environment are presented. This includes the number of academic libraries serving postsecondary education: 2-year, 4-year and university institutions.

(2) Expenditures - Basic metrics about library finance are presented. This includes total operating expenditures and expenditures of academic libraries serving postsecondary education: 2-year, 4-year and university institutions.

(3) Staffing - Basic metrics about the library workforce are presented. This includes total full-time equivalent (FTE) staffing and detail by position requirement when available for academic libraries serving postsecondary education: 2-year, 4-year and university institutions.

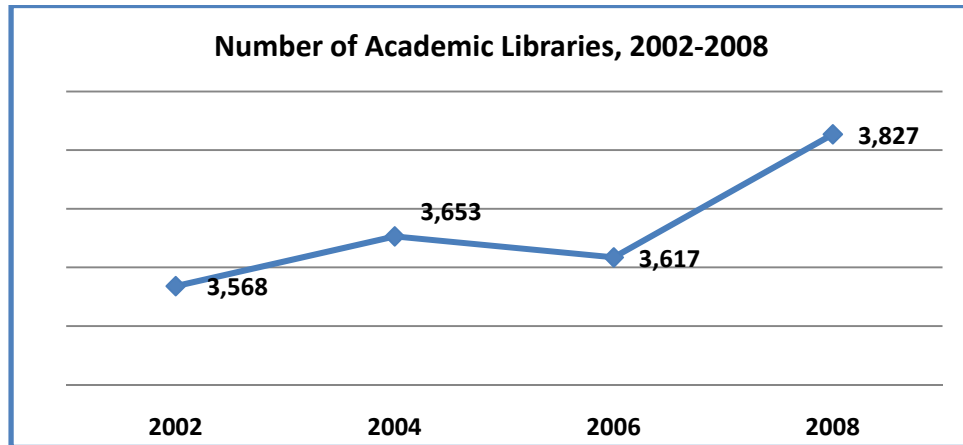
(4) Services - In this section basic metrics about the library services are presented. This includes circulation, service use (reference, computer, programs and training/instruction) and visits at for academic libraries serving postsecondary education: 2-year, 4-year and university institutions.

The data presented are compiled from reporting coordinated by the National Center for Education Statistics (NCES). Population figures are from the US Census Bureau.

Academic Libraries

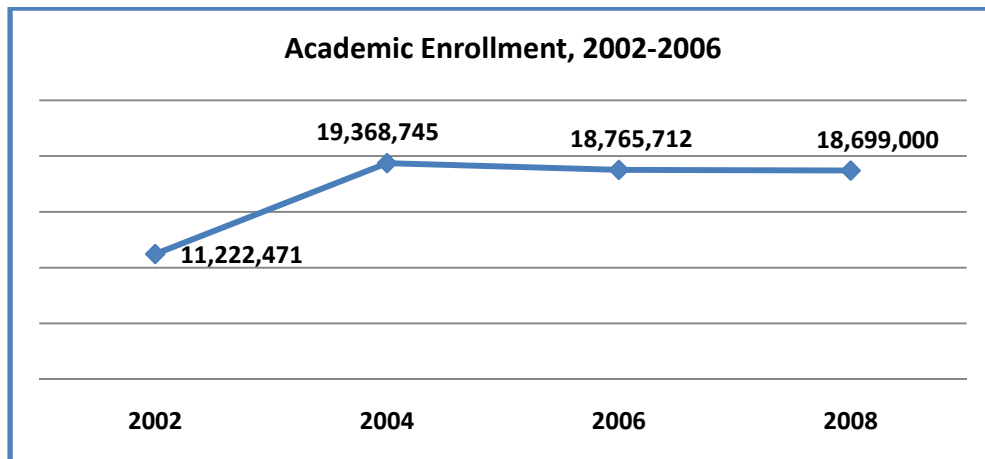
Numbers of Academic Libraries and Students Served

The number of academic libraries responding to the national biennial survey conducted by the National Center for Education Statistics (NCES) and the full time student enrollment for all academic institutions (not only those responding to the 2008 library survey) are presented in the following bar graphs.



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

The increase in responding institutions – more than 200 in 2008 from 2006 and previous years - is largely attributed to a rise in the number of private two-year degree granting institutions responding to the survey.

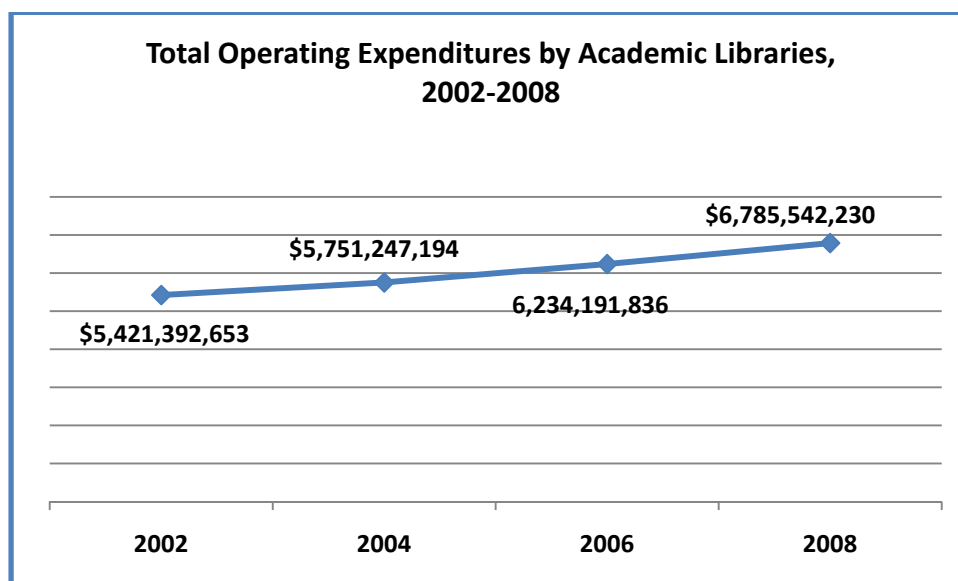


Source: National Center for Education Statistics. *2008 Digest of Education*, Table 189 (http://nces.ed.gov/programs/digest/d08/tables/dt08_189.asp?referrer=list), 2008 enrollment figures provided by the US Census Bureau.

Full time student enrollment is measured each fall, and declined nationally in 2006 from 2004 by about three percent, and again in 2008 by about three-tenths of one percent. The rise in enrollment from 2002 to 2006 is attributed to the increase in older students, age 25-29, and is an assumption applied in estimating future postsecondary enrollment.⁴

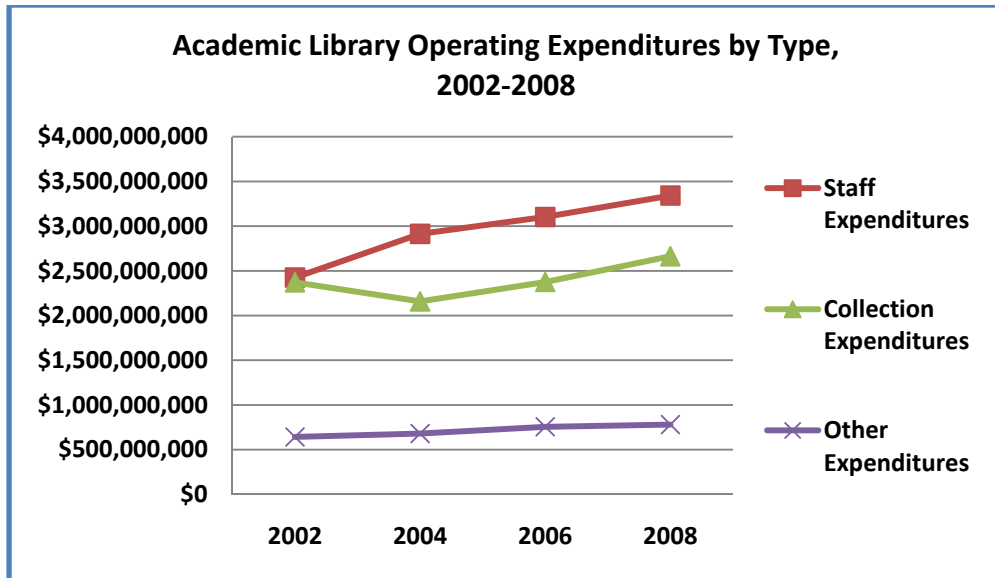
Academic Library Expenditures

Operating expenditures of academic libraries have risen modestly during the period 2002-2008. Overall operating expenditures for academic libraries rose 5.7 percent in 2004 from 2002, 7.7 percent in 2006 from 2004, and 8.1 percent in 2008 from 2006. The following two graphics present the total operating expenditures and expenditures by type for this period.



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

⁴ National Center for Education Statistics. *Projections of Education Statistics to 2018*. Section 2. Enrollment in Degree-Granting Institutions: Introduction. (<http://www.ala.org/ala/research/initiatives/membershipsurveys/index.cfm>)



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

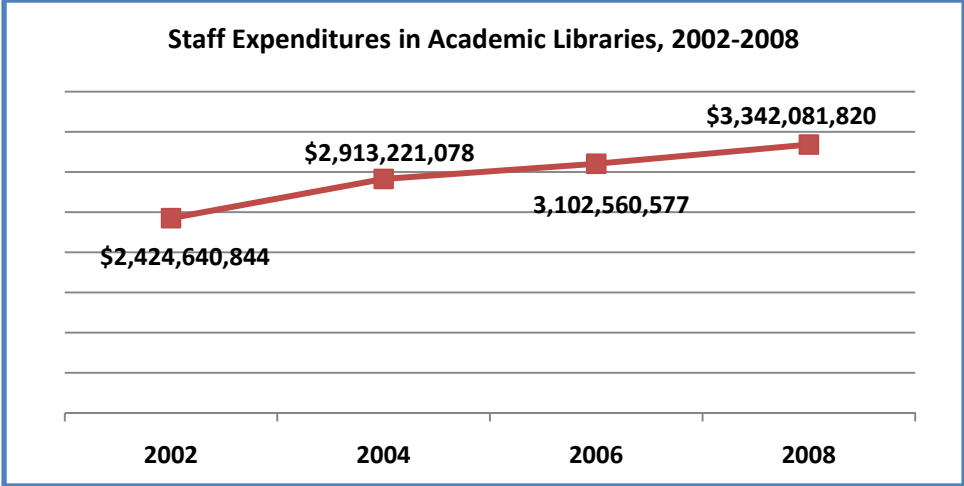
The following figure presents the expenditure change detail, 2002-2008.

	2002-2004	2004-2006	2006-2008
Total operating expenditure change	5.7%	7.7%	8.1%
Staff expenditure change	16.8%	6.1%	7.2%
Collection expenditure change	-9.9%	9.2%	10.8%
Other expenditure change	5.7%	10.0%	3.1%

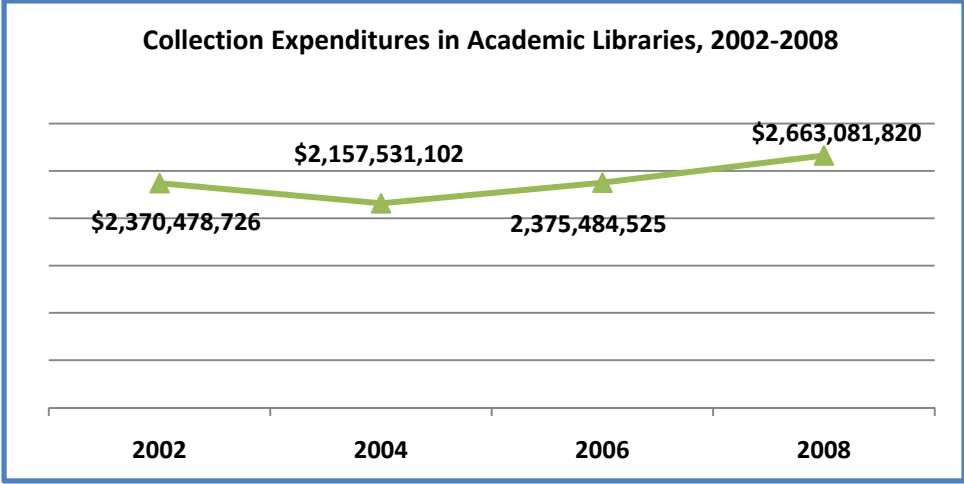
Academic libraries' expenditures increased considerably in FY2008 from FY2006 for electronic books, serial back files and other materials – from \$93.8 million in FY2006 to \$133.6 million in FY2008 – and for electronic current serial subscriptions – from \$691.6 million in FY2006 to \$1 billion in FY2008.⁵

The following three bar graphs present the detail of the individual expenditures for 2002-2008.

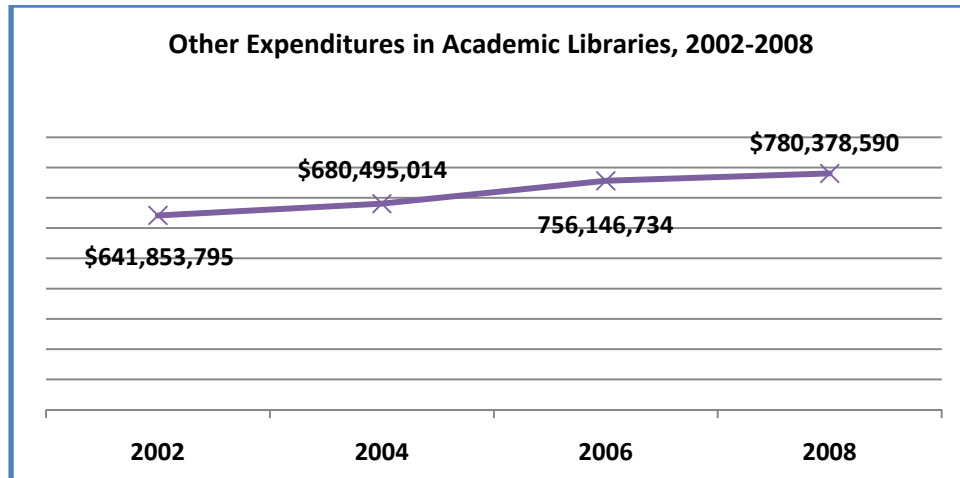
⁵ *Academic Libraries*, various years. Table 10. Expenditures for different types of information resources at academic libraries, by control, level, size, and Carnegie classification of institution.



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)



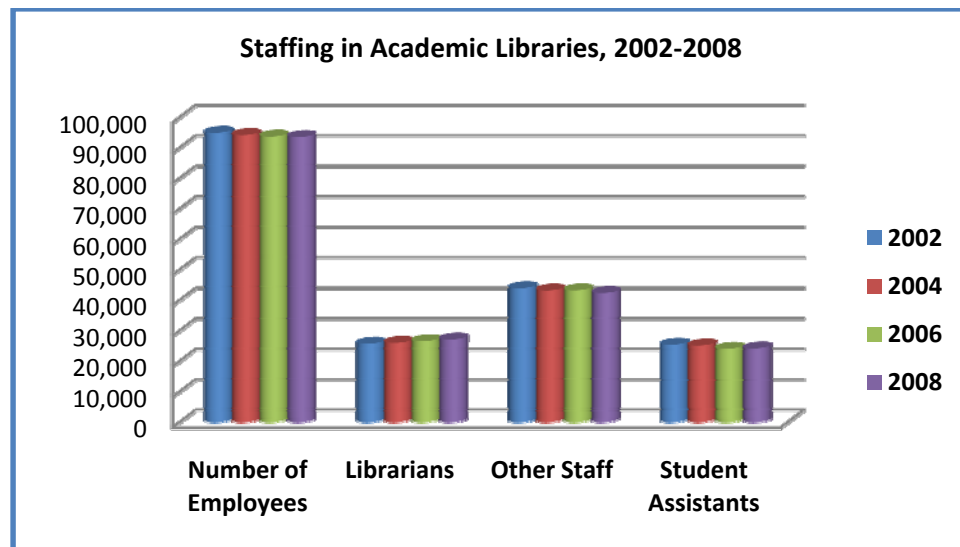
Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

Academic Library Services

Staffing in academic libraries remained fairly stable between 2002 and 2008. The following bar graph presents total staff and detail by category of employee – librarians, other staff, and student assistants. Although overall staffing declined by approximately 1.5 percent, those reductions are attributed to other staff (-3.6 percent) and students (-4.7 percent). The number of full-time equivalent librarians (MLS) increased 5.4 percent during this period.



Source: National Center for Education Statistics. *Academic Libraries*, various years (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

While visits to academic libraries increased in FY2008 from FY2002, use of other services has declined during this same period.

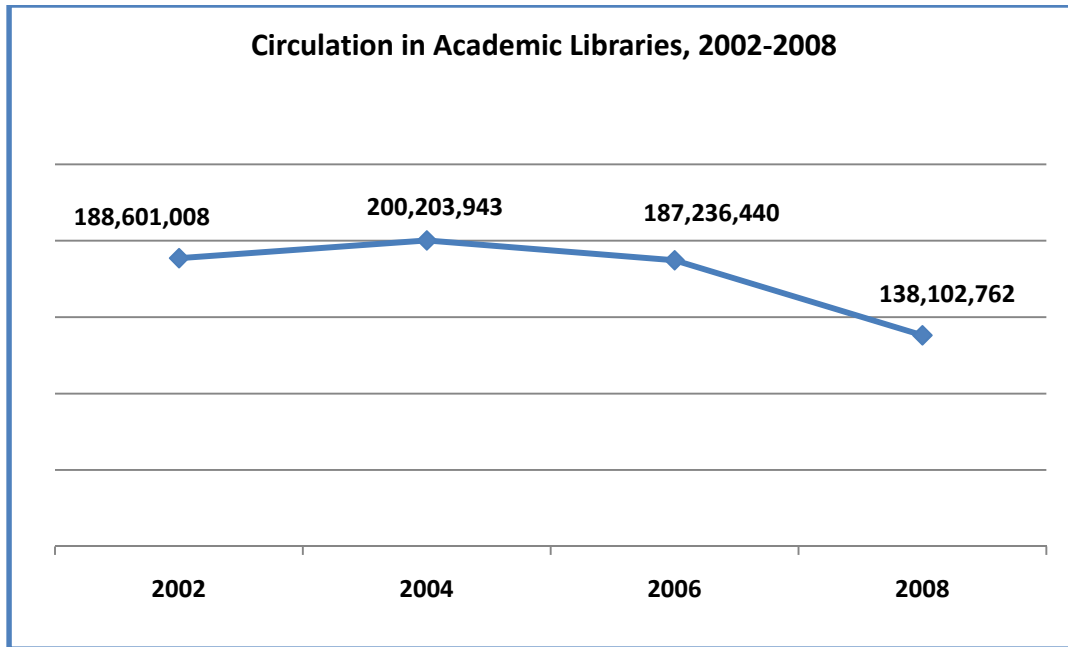
- During FY 2008, 3,827 academic libraries reported 138.1 million circulation transactions from the general collection. This is an overall decline of 6 million from FY2006, and more than half (3.3 million) are attributed to institutions at the Doctor's level. Institutions at the Less than 4-year level saw a decrease in FY2008 circulation of more than 62,000.⁶
- While FY2008 circulation declined, academic libraries reported more than 11 million books, journal articles and other materials through interlibrary loan transactions, an increase of 294,000 from FY2006. Academic libraries reported receiving from other institutions 10.6 million items, an increase of nearly 430,000 from FY2006.⁷
- Academic libraries received more than 935,000 documents from commercial services in FY2008, this was an overall decline of more than 259,000 from FY2006. Use of commercial services by private academic institutions declined by more than 300,000 from FY2006, but public institution use increased more than 45,000.⁸ This change can be explained in part by the significant increases in electronic journal subscriptions reported by academic libraries.
- During a typical week in FY2008, academic libraries had more than 20.3 million visits, answered more than 1.1 million reference questions, and made more than 498,000 informational services to groups attended by more than 8.9 million students and faculty. Visits to academic libraries increased about 1.5 million from FY2006, as did services to groups by about 27,000.⁹
- In fall 2008, 72 percent of academic libraries reported providing library reference service by e-mail or the Web, and 35 percent had active document digitization projects.

⁶ *Academic Libraries*, various years. Table 1. Total circulation, interlibrary loan transactions, and documents received from commercial services at academic libraries, by control, level, size, and Carnegie classification of institutions.

⁷ *Ibid.*

⁸ *Ibid.*

⁹ *Ibid.* Table 3. Gate count, reference transactions per typical week at academic libraries, and total information service to groups, by control, level, size, and Carnegie classification of institutions.



Source: National Center for Education Statistics. *Academic Libraries*, various years. Table 1. (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)

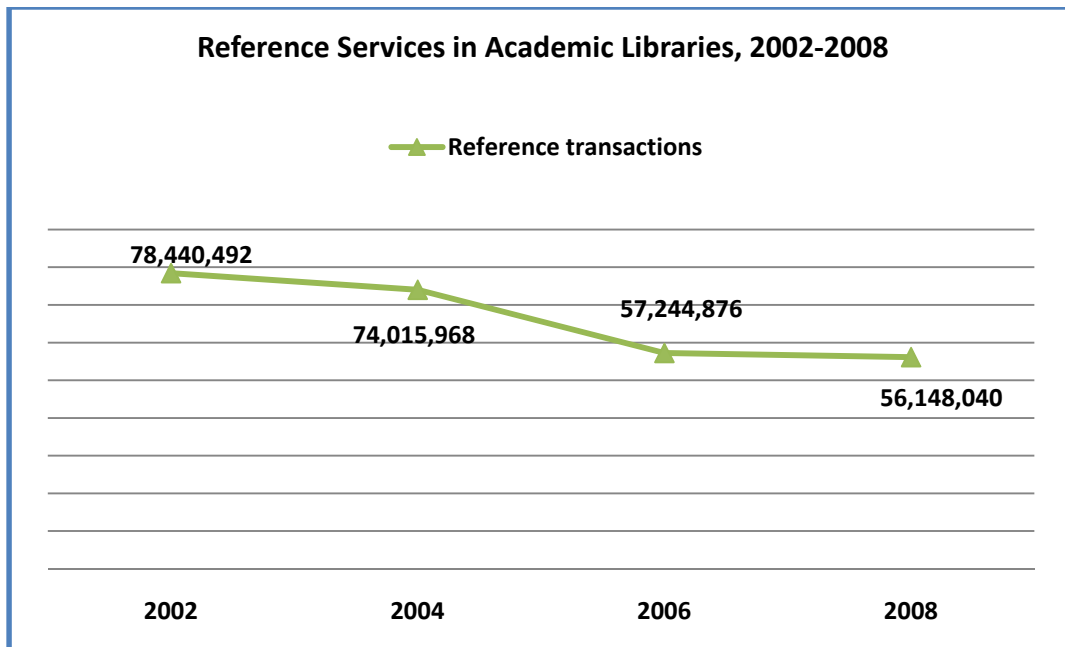
Countering the decline in electronic reference sources and aggregation services was a substantial increase in E-books from 64.3 million in FY2006 to 102.5 million in FY2008, and current serial subscriptions from 16.4 million in FY2006 to 25.3 million in FY2008. The largest increase in current serials subscriptions occurred with Doctoral/Research Carnegie class institutions, increasing to 11.4 million in FY2008 from 7.1 million in FY2006.¹⁰

Academic libraries added 24 million books, serial back files, and other paper materials including government documents in FY2008, 20 million E-books, 3.4 million current serial subscriptions, and 3.4 million audiovisual materials units.¹¹

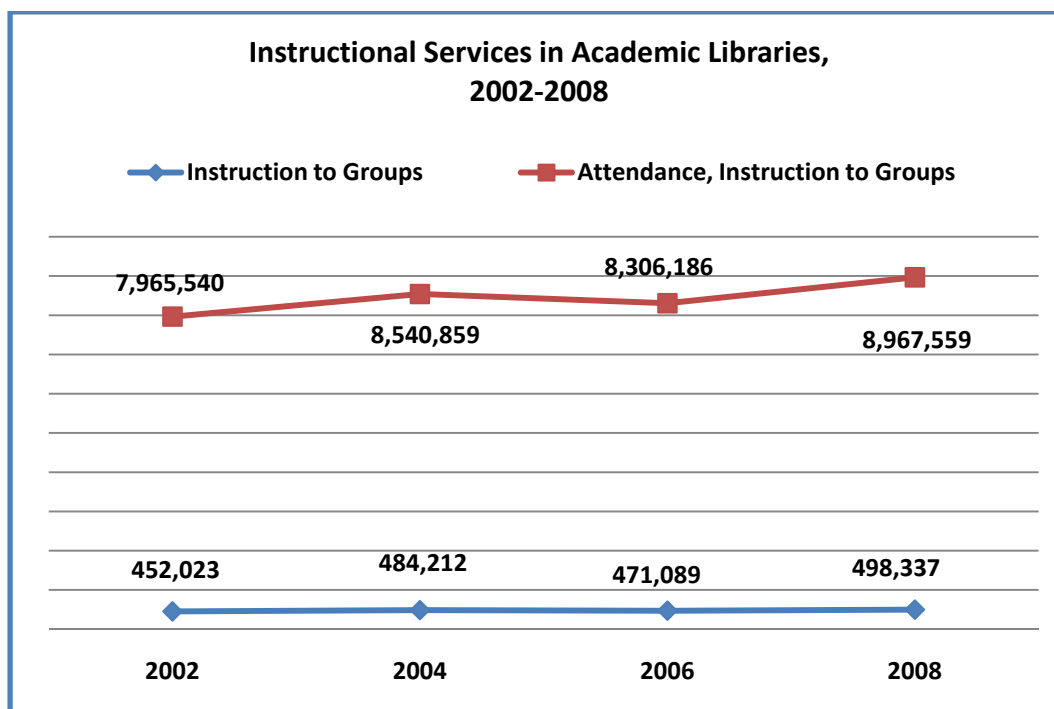
The following graphics detail academic library reference services, informational/instructional services to individuals and groups, and visits to the library.

¹⁰ Ibid. Table 5. Number of volumes, units, and subscriptions held during the fiscal year at academic libraries, by control, level, size, and Carnegie classification of institution.

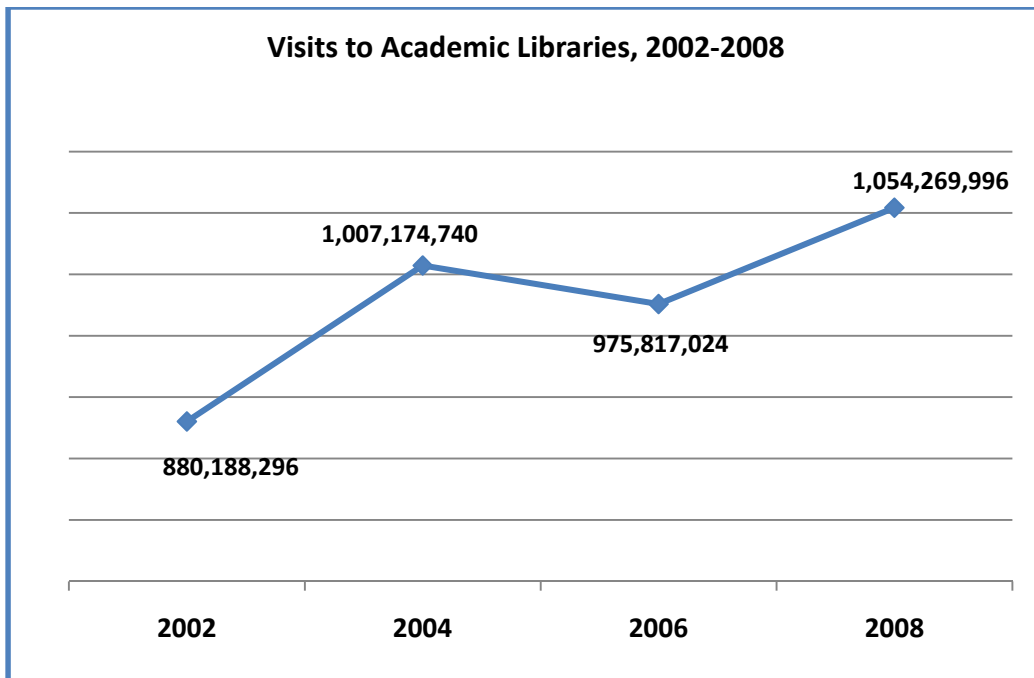
¹¹ Ibid. Table 6. Number of volumes, units, and subscriptions added during the fiscal year at academic libraries, by control, level, size, and Carnegie classification of institution.



Source: National Center for Education Statistics. *Academic Libraries*, various years. Table 2. (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)



Source: National Center for Education Statistics. *Academic Libraries*, various years. Table 3. (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)



Source: National Center for Education Statistics. *Academic Libraries*, various years. Table 3. (<http://nces.ed.gov/pubsearch/getpubcats.asp?sid=041#>)