

Spotlight: first glimpse of the post-Covid library

The last few years have been challenging, with the HE sector forced to adapt to the ever-changing restrictions imposed as a result of the Covid-19 pandemic. However, by the beginning of August 2021, most legal limits on social interactions had been lifted throughout the UK and things were looking more hopeful. Whilst the UK did spend parts of the 2021-22 academic year restriction free, the rise of another variant over the winter did see the return of some restrictions, albeit less stringent than those imposed earlier in the pandemic.

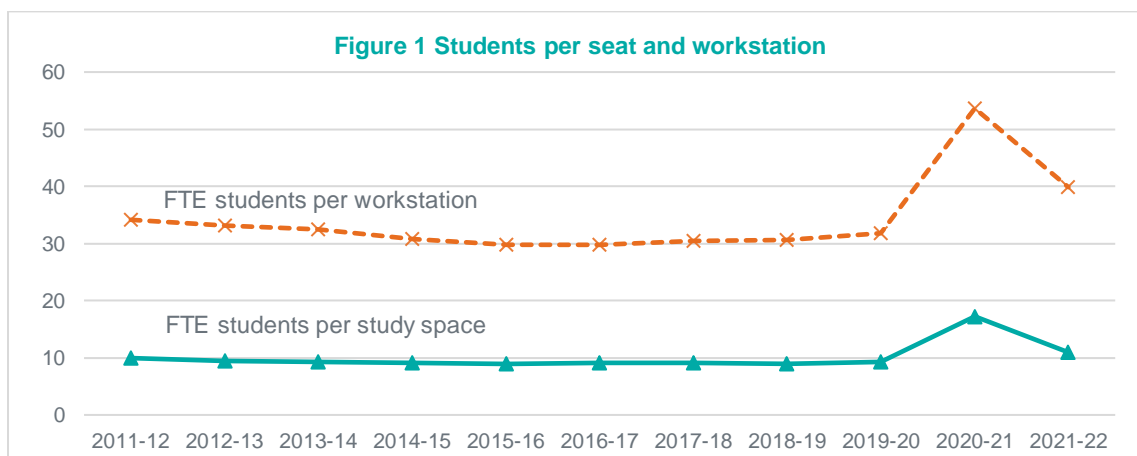
The 2021-22 academic year continued to provide challenges for UK academic libraries, with many institutions continuing to offer hybrid teaching and some library areas remaining closed for part, or all of the year. The 2019-20 and 2020-21 reports explored the impact of the Covid-19 pandemic on the UK HE sector and this report for the 2021-22 SCONUL Annual Statistics will revisit some of the topics included over the last two years and will examine how academic libraries, and their users, have responded to the relaxing of restrictions.

Key findings

- Average¹ unique loans per FTE student and visits per FTE user² have increased in 2021-22, although both remain somewhat lower than pre-pandemic levels.
- In 2021-22, 20% of information provision expenditure was accounted for by e-books – compared to 22% in 2020-21.
- In 2021-22, 6.1% of information provision expenditure was accounted for by print books (including special collections) – compared to 5.1% in 2020-21.

Library space

It should be noted that in the 2019-20 SCONUL survey respondents were asked to provide the number of spaces available to users pre-pandemic, rather than the situation on the 31 July 2020; therefore, 2018-19 will be used to discuss any changes with pre-pandemic levels.

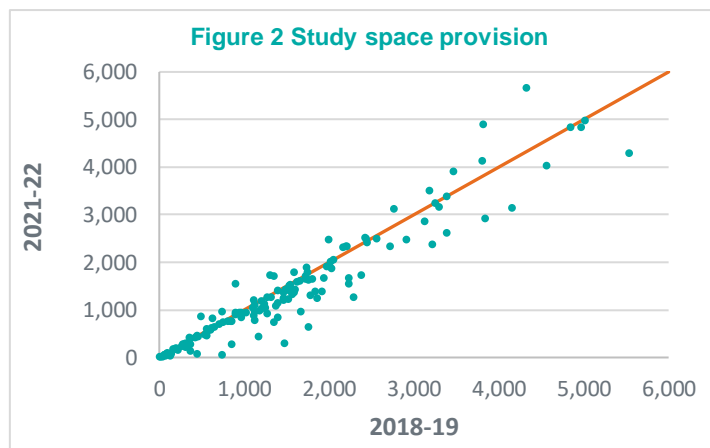


¹ Note that the averages given throughout the report are the weighted averages of all institutions included

² Throughout this report FTE users are calculated as FTE students + FTE academic staff

Figure 1 shows that there was little change in the average number of students per study space between 2011-12 and 2018-19. An emphasis on social distancing measures saw a vast reduction in the level of study spaces and workstations available to users in academic libraries throughout 2020-21, with the average number of students per study space 91% higher than in 2018-19.

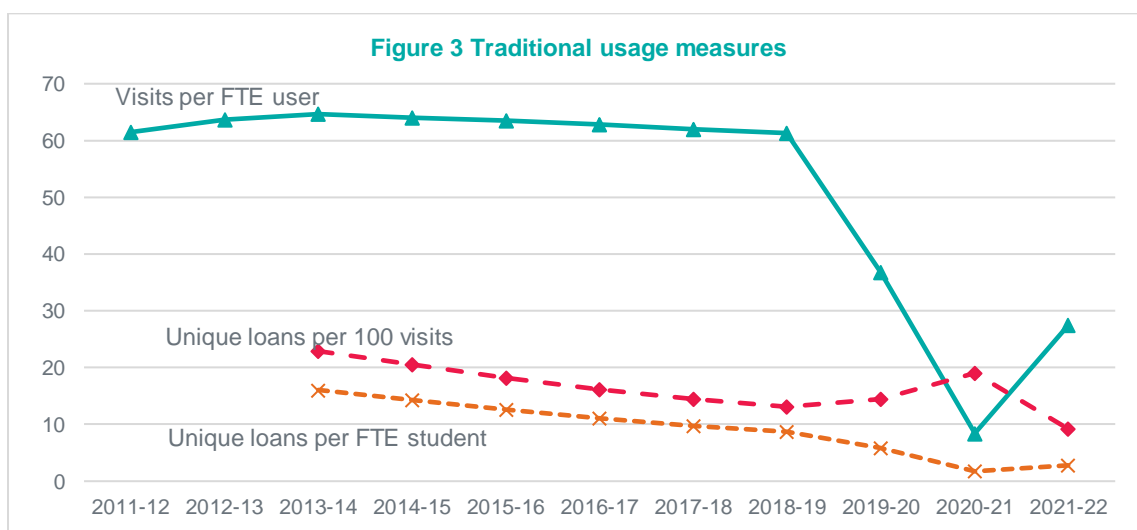
With the relaxing of restrictions, some institutions took the opportunity to reassess their offering and reconfigured space as a result, while others returned to full capacity during 2021-22, with a corresponding decrease in the number of students per study space, although the average remains 22% higher than in 2018-19. It is notable that the trend of an overall decrease in



the provision of study spaces since 2018-19 is not sector-wide, with Figure 2 illustrating that, of the 144 institutions providing the detail in both years, 38 (26%) provided more study spaces in 2021-22 than in 2018-19, and therefore lie above the line of equality.

The average number of students per workstation follows a similar trend, although the average did fall slightly over the period 2011-12 to 2018-19, before increasing so that the level was 76% higher in 2020-21 as a result of social distancing measures. The most recent year has seen a 26% decrease, although the average number of students per workstation remains 31% higher than in 2018-19. It should be noted that, while legal limits on social interactions had been lifted by August 2021, some academic libraries continued with social distancing measures to increase user confidence in returning to campus, and it will be interesting to see how, or if, these levels will change during the first full restriction-free year.

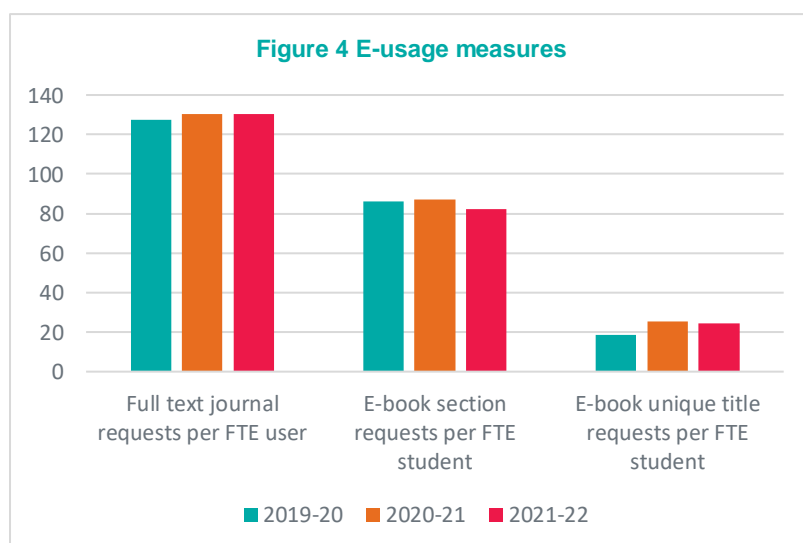
Traditional usage



As observed in previous reports, and not surprising considering the lack of students on campus for periods of time, the Covid-19 pandemic significantly impacted on more traditional library usage figures such as footfall and loans. Figure 3 highlights that the average number of visits per FTE user remained relatively stable over the period 2013-14 to 2018-19; however, library closures led to a 40% decrease in 2019-20, followed by a 77% decrease in 2020-21 so that, on average, there were around 8 visits per FTE user – compared to 61 visits per user in 2018-19. The relaxing of restrictions in 2021-22 has seen the level more than triple, with an average of 27 visits per FTE user, although it remains less than half the pre-pandemic levels reported in 2018-19, and 25% lower than in 2019-20.

A similar pattern emerges when we consider the average number of unique loans per FTE student, albeit on a smaller scale, with an increase of 56% in the most recent year, so that the level remains 69% lower than the pre-pandemic levels recorded in 2018-19. Figure 3 also illustrates that the average number of unique loans per visit fared better in 2020-21 and was 46% higher than in 2018-19. However, in contrast to the other traditional usage figures noted here, the most recent year has seen a decrease, so that there was an average of nine unique loans per FTE visit – compared to thirteen in 2018-19. The move from print to electronic has been happening for some time, with the pandemic undoubtedly accelerating this shift, and it remains to be seen whether the use of print resources will recover to pre-pandemic levels.

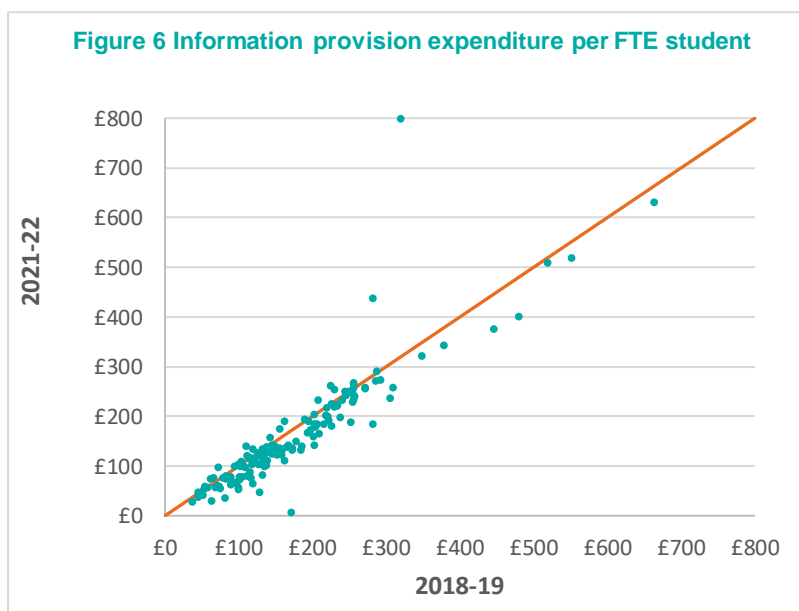
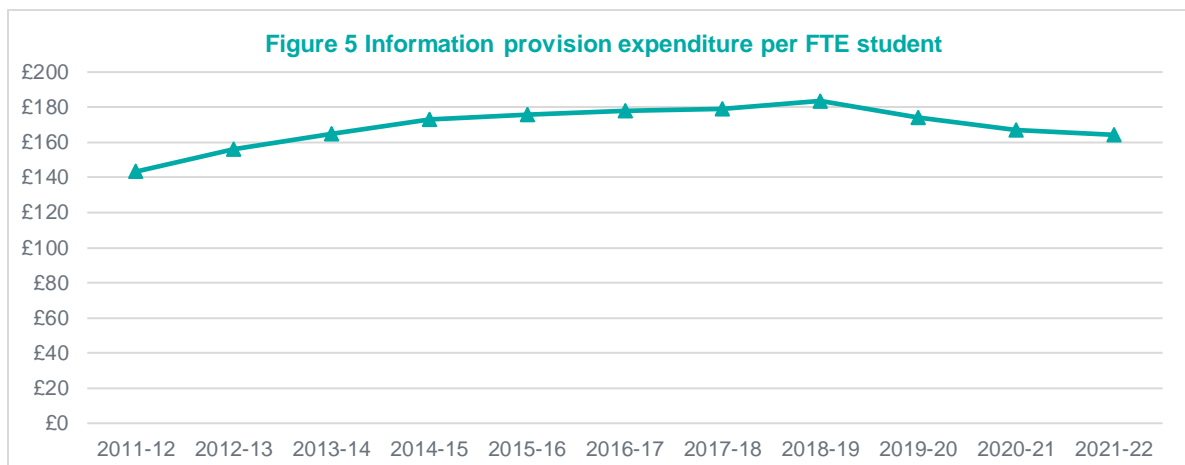
E-usage



The introduction of COUNTER Release 5 in January 2019 aimed to remove inconsistencies and provide more reliable e-resource usage data; however, it has resulted in e-book usage data essentially being reset and any comparisons with previous years are meaningless. Figure 4 displays the e-resource usage data for the three years since the introduction of COUNTER

Release 5, and shows that there has been little change over the course of the pandemic. The average number of unique title requests of e-books per FTE student shows the biggest change, with an overall increase of 33% between 2019-20 and 2021-22; however, it is notable that fewer publishers were providing this information in the first year of COUNTER release 5.

Information provision expenditure



The pandemic saw institutions respond in a variety of ways with regards to expenditure on information provision with some tightening the purse strings, and others providing an injection of funding for e-resources to facilitate the rapid shift to digital. Figure 5 illustrates that average information provision expenditure per FTE student has decreased year-on-year since 2018-19, and is currently on a similar level to

that reported in 2013-14. However, it is notable that this trend is not sector-wide, with Figure 6 showing that, of the 143 respondents providing the detail in both years, 38 (27%) spent more on information provision per FTE student in 2021-22 than in 2018-19, and therefore lie above the line of equality.

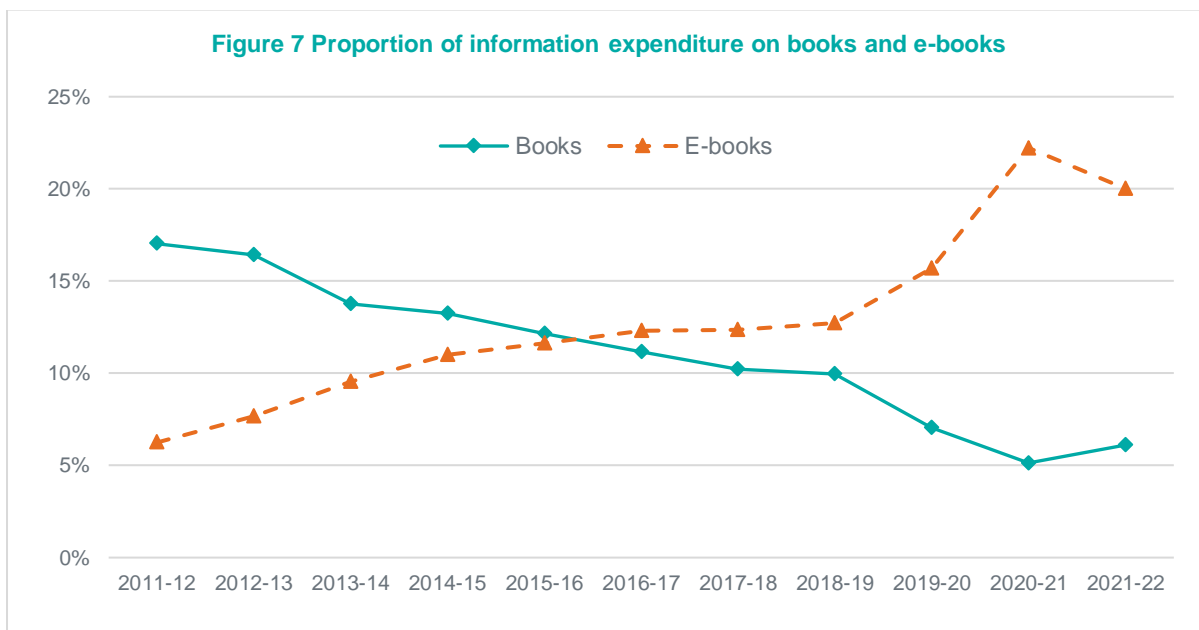
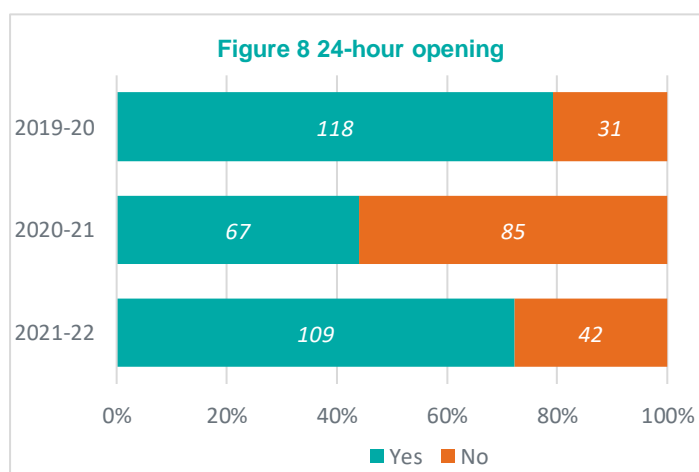


Figure 7 displays the average proportion of information provision expenditure spent on both print and e-books, and highlights that, while the digital shift has been gradually happening for more than ten years, the pandemic has been an accelerator. In 2018-19, e-books accounted for 12.7% of information provision expenditure, on average, slightly higher than the 10.0% accounted for by print books. However, the next two years saw the gap widen, so that 22% of information provision expenditure was spent on e-books in 2020-21, while print books accounted for just 5.1%. The most recent year has seen a decrease in the proportion of information expenditure spent on e-books (20%), with a corresponding increase in the proportion spent on print resources (6.1%), although it remains somewhat lower than pre-pandemic levels.

24-hour opening

The Covid-19 pandemic also impacted on the provision of 24-hour opening, with library closures, as well as social distancing measures, resulting in libraries being unable to offer this level of service. Figure 8 illustrates the changes in this practice over the three most recent years, with 79% of responding UK HE institutions offering 24-hour opening at some/all of their libraries for at least part of the 2019-20 academic year, with restrictions not imposed until March 2020. This compares to fewer than half of responding institutions providing 24-hour opening in 2020-21, with many noting that this service had been suspended in response to the pandemic. The



at least part of the 2019-20 academic year, with restrictions not imposed until March 2020. This compares to fewer than half of responding institutions providing 24-hour opening in 2020-21, with many noting that this service had been suspended in response to the pandemic. The

most recent year saw restrictions relaxed and institutions were once again able to open their libraries for 24 hours a day, with 109 (72%) responding UK HE institutions indicating that this service was offered for at least part of the year.

Conclusion

Despite optimism of a return to 'normality' as we approached the 2021-22 academic year, academic libraries, along with the UK HE sector as a whole, were still impacted by the Covid-19 pandemic and largely continued to offer students a hybrid service with some students continuing to stay away from campus. At the time of writing, there are no restrictions in place and the 2022-23 academic year is expected to provide a fuller picture of what shape the post-Covid academic library will take. There were some encouraging signs in 2021-22 with some of the changes observed during the pandemic years starting to reverse; however, it remains to be seen whether areas such as the provision of study spaces, information provision expenditure or the use of print resources will fully return to pre-pandemic levels. What remains clear is that academic libraries will continue to provide students with the assistance and resources they need to complete their studies, whether in-person or virtually.

Informal groupings of institutions used for summary data

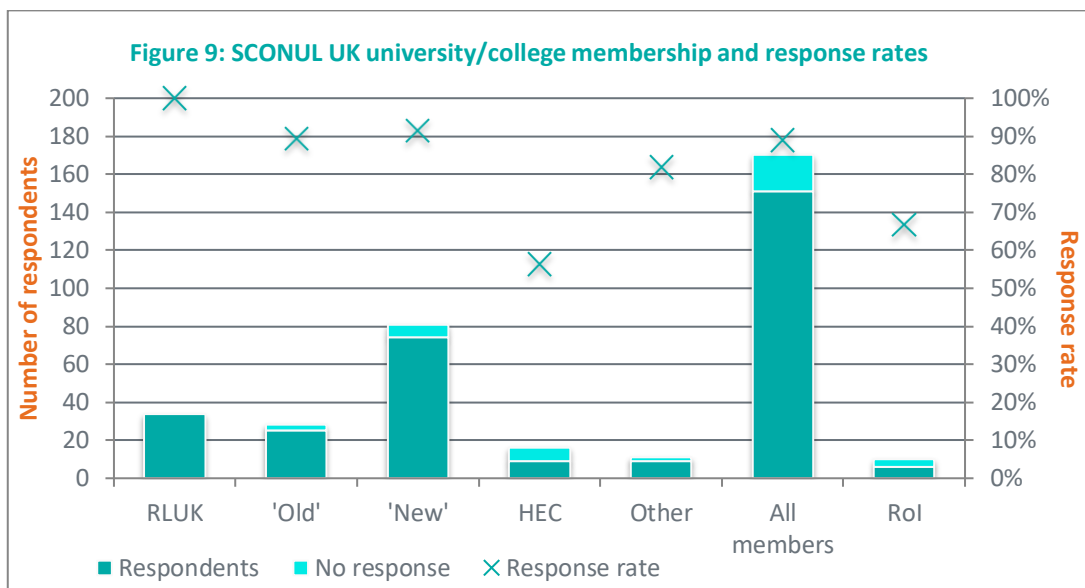
SCONUL's higher education members vary considerably in both size and character. As an aid to the interpretation of these statistics, libraries have been divided into four informal groups, which tend to have many characteristics in common. These are:

- 'RLUK' UK members of Research Libraries UK (except for the National Library of Scotland)
- 'Old' Those universities founded or chartered before the Education Reform Act 1992, excluding RLUK members.
- 'New' Universities incorporated in 1992 or subsequently. These include the former polytechnics, and some former HE colleges.
- HEC Higher education colleges which do not have formal university status. These are primarily small institutions, each specialising in a narrow range of subjects, although the set of subjects covered is diverse.

Membership of these groups changes from year to year, as institutions merge, HE colleges gain university status, and new members join RLUK. Institutions are included in the group to which they belonged for the majority of the year to which the statistics relate. Changes in groups from the previous year are given at the end of the notes to the returns (*page 115*). A small number of members fall outside these groups; in particular independent institutions which do not report to the Higher Education Statistics Agency (HESA), non-academic organisations and the Open University. Their data are included in the overall totals, however.

Information on the mission groups (Russell Group, University Alliance, MillionPlus, GuildHE, Cathedrals Group, Conservatoires UK) to which institutions belong are also included in the survey.

Response rate



The UK response by institution type is illustrated in Figure 9. The compilers are grateful to the many institutions which provided statistics and spent time answering queries.

HESA data

Data for FTE students and FTE academic staff in the UK were obtained from HESA wherever possible. Their definitions are given on page 118. Data for other institutional employees (FTE) and registered external users (actual numbers) were obtained directly from respondents. In order to calculate a figure for total FTE users, the number of registered external users has been scaled by a factor of 40% to approximate to FTE use.

For the 2021-22 survey, data on total institutional expenditure was also obtained from respondents and is displayed rounded to the nearest thousand.

Please note that data for FTE students and FTE academic staff complies with the HESA Services Standard Rounding Methodology (<https://www.hesa.ac.uk/about/regulation/data-protection/rounding-and-suppression-anonymise-statistics>). Any FTE student and FTE academic staff data obtained from individual institutions has also been rounded using the same methodology for consistency.

Accuracy

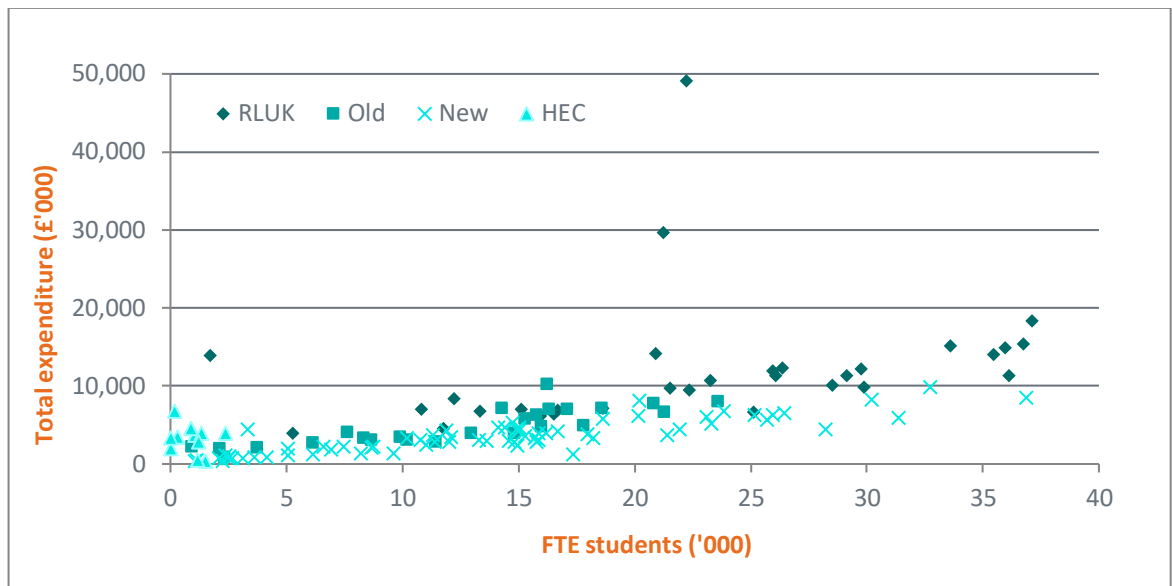
Over recent years, respondents have made efforts to improve the quality of data returned, and each year there are fewer gaps and less data identified as not conforming to the definitions. There is also increased consistency over the distinction between “not applicable” (*the activity concerned is not performed at the institution*), “not known” (*the activity does occur, but is not counted or analysed in such a way as to provide a figure*) and “nil” (*the count is zero for the year in question*); however, there may still be a few instances where *n/a* has been entered instead of *n/k*, and vice versa. There may also be a few cases where respondents have entered *n/k*, but the relevant information is included in another column. Respondents are encouraged to mark any such combined data entries clearly. Figures

which are known not to conform to the standard definitions are indicated by the use of italics in the data tables. In some instances, explanatory notes have been included, and readers should refer to these to aid interpretation.

There remain some problem areas, most notably concerning the provision and use of electronic resources, and users of the statistics are recommended to read the notes to the returns (*pp 80-115*) in conjunction with the figures, to aid interpretation.

Financial summary

Figure 10: Total library expenditure and student numbers (UK)



The range of expenditure levels, and their close relationship with student numbers, is shown in Figure 10. A summary of the main financial figures has been included before the main data tables (*pp 12-15*). This shows both actual expenditure and expenditure per FTE student for the main heads of staff, information provision, equipment, and other operating expenditure. The 148 UK members which provided full details for this summary spent over £800 million in total, an average of £371 per FTE student.

Strategic Planning Set

The data collected in the Strategic Planning Set are included between the summary of the main financial data and the main data tables (*pp 16-27*). These tables present the most recent available data and so may vary from those in the Strategic Planning Set tables originally released in December 2022. Additional derived ratios are also included within this data set – not all of which are repeated within the derived ratios section of the report.

Main data tables

The main data tables (*pp 28-59*) show the data as received from each institution. The data extend over four pages for each column. The list of institutions (*pp 80-115*) is given in the same order as the data and provides a key to the identifiers used, with all institution names given as of July 2022. All mandatory items from the questionnaire are shown, and columns are generally in the order of the questionnaire, although some slight changes have been

made to facilitate presentation. A copy of the tables in excel format, including the optional questions, is also available. A copy of the full questionnaire, including the notes, optional questions and definitions, is included at Appendix B for reference (*pp 119-131*).

Entries in italics in the tables do not conform to the standard definitions for the column, either because they include data which should properly be included in another column, or for some other reason, given in the notes to the tables (*pp 80-115*). Where figures relate to two or more columns, this is indicated within the body of the tables.

An extended set of summary statistics has also been included. Summary figures are given separately for each of the four major UK library groups – RLUK members (excluding the National Library of Scotland), other ‘old’ universities, ‘new’ universities and higher education colleges. The total for all UK respondents is also given. The mean, minimum and maximum have been supplemented with the upper and lower quartiles, for each group. These summary statistics include data which do not conform to the standard definitions, identified by the use of italics in the tables. An increasing number of non-academic institutions are submitting returns to SCONUL, and such institutions will not be included in the UK summary figures for those derived ratios calculated per FTE student.

Some relevant totals not included on the questionnaire have been included at appropriate points in the series. Detailed definitions for these columns are given in Appendix A (*page 116*). If a component of a calculated total has been marked *n/k* in the return, generally that total has not been included for that institution. Data on FTE students and academic staff, and total institutional expenditure have been obtained directly from HESA as far as possible.

Because of their different regulatory framework and currency, SCONUL members from the Irish Republic, have not been integrated into the alphabetical sequence of institutions, but are grouped together following the UK list. They are also not included in the UK members’ summary data. Separate summary statistics have been provided; however, these are limited and, in particular, means for the derived ratios have been calculated only where at least four responding members have provided data.

Derived statistics

The derived statistics follow the main data tables, starting on page 60. Full definitions for each are given in Appendix A (*pp 116-118*). Only those derived statistics based on mandatory questions are included here, the full set is included in the excel spreadsheet containing the optional questions. As for the totals in the main tables, if any component of a derived ratio has been marked *n/k* in the return, that ratio has not been calculated for that institution. The ratios have been divided into the following broad groups:

- Library provision and use (*pp 60-63*)
- Stock - provision (*pp 64-67*)
- Stock – expenditure and use (*pp 68-71*)
- Staff workload (*pp 68-75*)
- Financial ratios (*pp 72-79*)
- Electronic resources (*pp 76-79*)

Where source data items do not conform to the standard definitions, ratios have been included in the lines for individual institutions wherever possible and are shown in italics. Note that the averages given are the weighted averages of all institutions included, not the arithmetic average of the ratios shown.

Equality, Diversion and Inclusion

Following the conclusion of SCONUL's equality, diversity and inclusion benchmarking data project, the 2021-22 survey included questions on the ethnicity of library staff and the results will be published in a separate report later this year.

SCONUL web database and the Statistical Reporting Tool

The 2021-22 statistics will be incorporated into the web database and uploaded to the Statistical Reporting Tool shortly after publication. SCONUL are grateful to those members who have taken the trouble to answer queries on their historic data and so improve the quality of the available data. The Statistical Reporting Tool is accessible to members on the SCONUL website.

If any institution becomes aware of errors in the published data, they are asked to send details directly to SCONUL so that corrections can be made in the database. Similarly, if any institution has previously unpublished data that they are prepared to have included in the historical database, they should contact SCONUL.

Specific analyses and investigations can be undertaken on behalf of individual institutions, for a small fee to cover the staff time required. Any interested institutions are asked to contact Sonya White directly (sonya.white@hotmail.co.uk) to discuss their requirements.