

Commentary on the SCONUL Annual Statistical Return 2016 - 2017

Spotlight on: The continuing evolution of UK academic libraries

This report for the 2016-17 SCONUL Annual Statistics will investigate the ongoing changes taking place in UK academic libraries and the impact these changes are having on overall library usage. It will explore trends in the purchase and use of print and electronic books, provision of IT (both fixed and laptop loans) for students and how library buildings/spaces are being adapted and used to support student learning and whether this has had an impact on visits to library buildings. It illustrates that e-resources are now a central element of the service provided and academic libraries are continuing to evolve in order to keep pace with constant technological advancements, as well as the changing perceptions and attitudes of users as a result. It builds on the content of the reports in the last three SCONUL Annual Statistics (the changing trends in loans, visits and e books (2013-14), library space (2014-15) and library staff (2015-16)).

The SCONUL annual survey was reviewed extensively for the 2013-14 data collection exercise and as a result several questions were altered, some were removed, whilst others became optional. As a result, this report will generally focus on the trends over the last four years, although we will also consider the ten-year trends for those questions where comparable data is available.

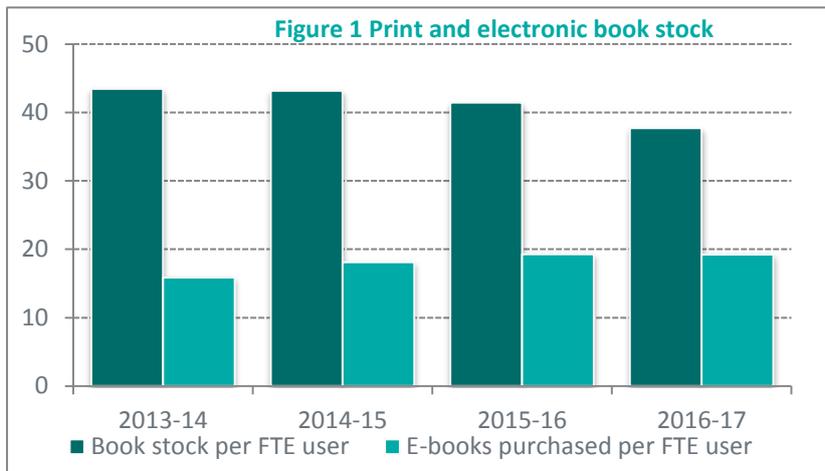
Information resources

There is no doubt that advances in technology over the last ten years have culminated in electronic resources now being a core element of academic libraries content provision, with the majority of Higher Education institutions indicating that electronic access to books and journals is now the norm. As anticipated there has been a growth in the average number of journals UK HE libraries subscribe to. In 2016-17¹, there was an average of 3.1 serial titles purchased per FTE user², with 98% of these received in electronic-only format - compared to an average of 1.1 serial titles purchased per FTE user in 2009-10 (the first year of the new definitions, so that freely available titles were no longer included), with 91% received in electronic-only format.

Figure 1 displays average catalogued print book stock per FTE user and the average number of e-book titles purchased per FTE user in each year since 2013-14, and illustrates that average print book stock per FTE user has fallen by 13% over the three-year period. This compares to an increase of 21% in the average number of e-book titles purchased per FTE user over the same period, with this increase likely to be as a result of a growth in the availability and range of e-titles, as well as student demand.

¹ Note that, throughout this commentary, figures for 2016-17 are based on actual respondents, and do not include estimates for non-respondents. Figures for previous years are taken from the SCONUL database, and include estimates for non-respondents, unless noted otherwise.

² FTE users are calculated as FTE students + FTE Academic Staff + other institutional employees FTE + 0.4 x external users



At first glance, Figure 1 appears to illustrate that average catalogued book stock per FTE user is not falling at as fast a pace as might have been expected. However, the figures hide large variations between individual institutions. In particular, those institutions with historically large print collections will continue to record higher levels of

catalogued book stock per FTE user compared to smaller, newer institutions.

Figure 2 shows the proportion of total book stock (calculated as catalogued print book stock plus e-book titles purchased) accounted for by e-book titles in 2016-17 for each of the individual sectors and for the UK SCONUL membership overall. As can be seen, just over one-third of total book stock is currently accounted for by e-book titles, on average, for UK SCONUL members; however, when we consider the different sectors this ranges from an average of 23% for RLUK members to an average of 51% for the ‘new’ (post-1992) institutions. When we consider individual institutions, e-book titles accounted for between 0.1% and 92% of total book stock in 2016-17, demonstrating the varying degrees of the take-up of e-book collections and databases throughout the UK SCONUL membership.



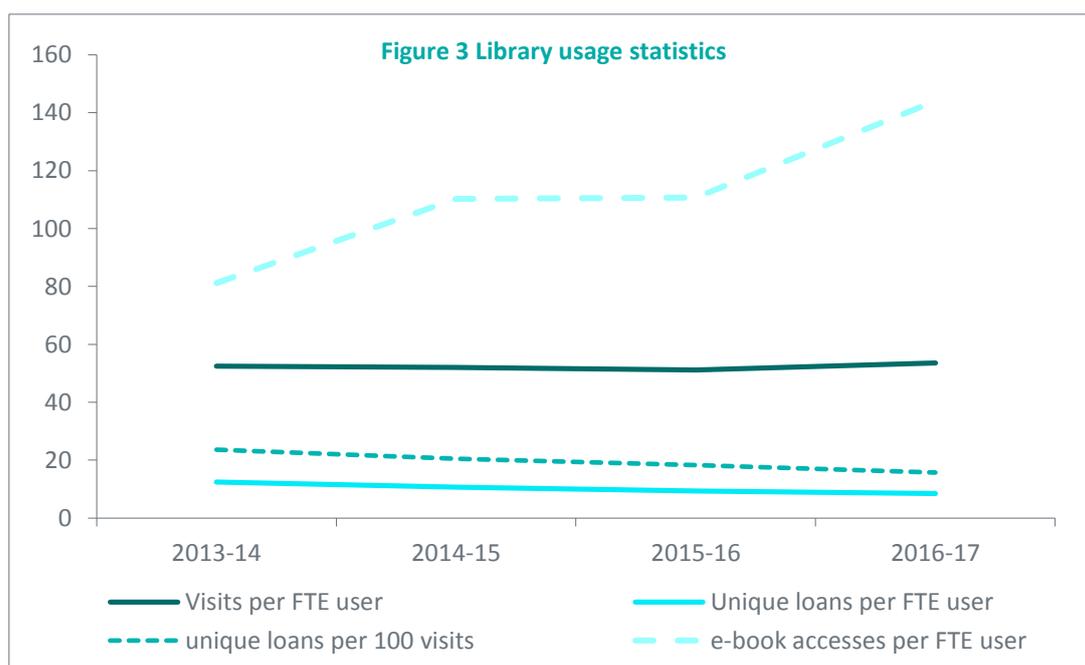
One of the challenges for SCONUL in trying to measure and assess the impact of e-book take-up is the variety of access models available. The survey question refers to ‘titles’ in order to try to establish a fair comparator. It is not possible to gauge within this the digital rights management utilised for offering access to titles. Publishers’ access models vary, with some allowing multiple simultaneous accesses versus those that require the purchase of

additional copies for multiple accesses. Students and academic staff expect e-books to be available anytime, anywhere with no restrictions and are surprised and disappointed when they cannot access a title due to simultaneous user licence restrictions. Equally, the statistics have not attempted to look at the take up of e-textbooks (one copy of an e-book for each student), which are sometimes purchased by libraries, but are often bought at a departmental or institutional level at high cost. The varying access models demonstrate another way in which academic library staff have been required to adapt their skills to ensure they understand the options available for their library.

Library usage

Given the declining levels of catalogued print book stock per FTE student, it is perhaps inevitable that physical loans per FTE student are also continuing to fall. Since 2013-14 SCONUL has collected data on the number of unique loans only with renewals no longer included. Figure 3 displays average unique loans per FTE user, as well as the average number of unique loans per visit, average visits per FTE user and average e-book accesses per FTE user. Overall since 2013-14 the average number of unique loans per FTE user has fallen by 27% with the average number of unique loans per 100 visits falling by 33% over the same period.

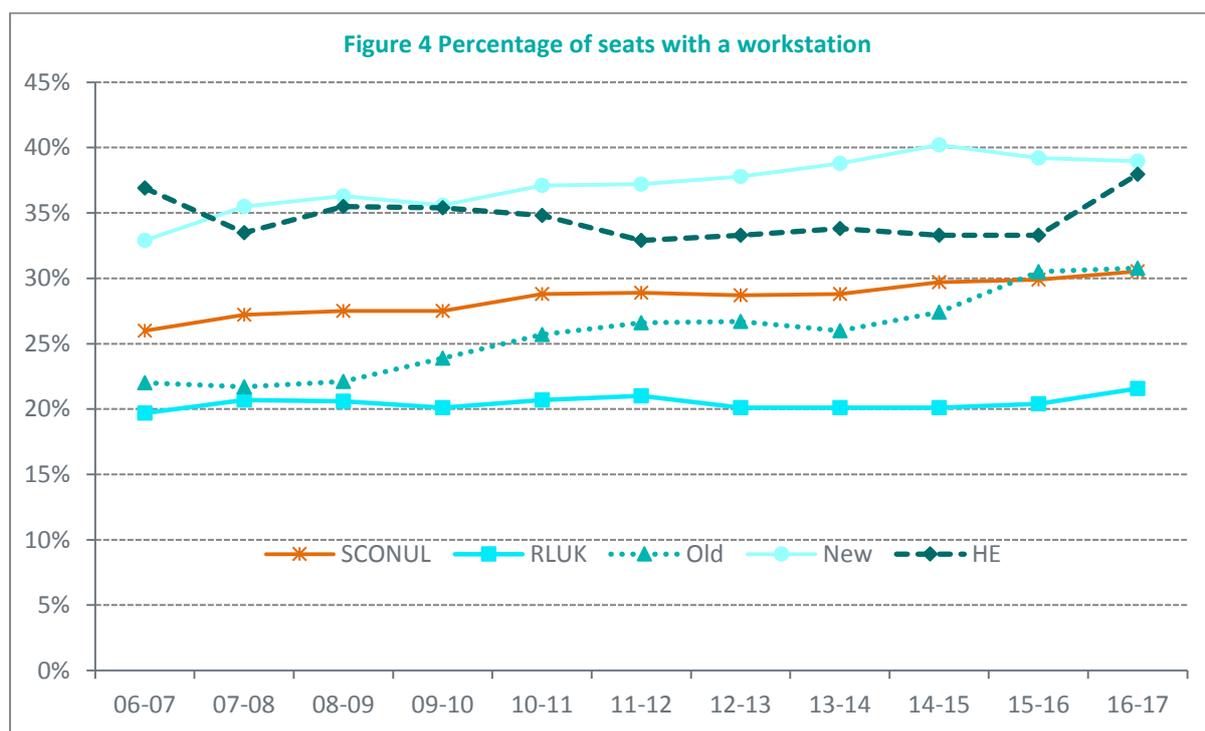
In contrast to this, Figure 3 also illustrates that the average number of visits per FTE user has remained relatively stable over the last four years, although the average is currently 2.1% higher than in 2013-14. The total number of visitors entering the library during the year has been collected since the SCONUL survey began and it is an encouraging sign that the average number of visits per FTE user is currently 1.2% higher than ten years ago. In addition, the average number of e-book accesses per FTE user is 77% higher in 2016-17 than in 2013-14, and, taken together, these trends appear to indicate that, despite the growing reliance on e-resources and the ability to access these resources remotely, the predicted decline of library use has not happened.



Opening hours will undoubtedly have an impact on library usage and in 2016-17 111 UK respondents (74%) indicated that at least one of their libraries offered 24-hour opening for all or part of the year – compared to 100 UK respondents (67%) in 2013-14. In addition to this, shared buildings will also impact on footfall in libraries, with two-thirds of UK respondents in 2016-17 indicating that their library was co-located in a building with a café; 67% indicating that the library was co-located with other student facing services or facilities; 53% indicating that the library was co-located with centrally timetabled rooms, and 37% indicating that the library was co-located in a building with lecture theatres. Overall, just sixteen UK respondents (10.7%) indicated that their library was not co-located with any of the listed services or facilities.

Space and equipment

As mentioned in the 2014-15 *SCONUL Annual Library Statistics* the changing perceptions of users are impacting on library space. Libraries are rethinking the layout of their buildings to provide a greater range of study environments (individual, group, and breakout), enabling students to choose the study environment that best suits their needs. In addition some libraries are introducing makerspaces so that libraries are increasingly becoming part of the creative process.



Despite an overall increase in student numbers over the last ten years, the provision of study spaces is keeping pace, with an average of 9.2 students per seat in 2016-17, compared to 9.3 in 2013-14 and 9.1 ten years ago. In addition, UK Higher Education institutions are continuing to provide fixed workstations for library users, with Figure 4 displaying the trend in the average proportion of seats equipped with a workstation for each of the sectors since 2006-07. On average, 31% of seats were equipped with a workstation for UK SCONUL members in 2016-17 – compared to averages of 29% in 2011-12 and 26% ten years ago.

There are differences between the sectors, however, with 22% of seats equipped with a workstation in the most recent year at RLUK member institutions, compared to an average of 39% for the 'new' (post-1992) institutions.

It is important to note, however, that an increasing provision of workstations is not widespread throughout SCONUL member institutions, with some academic libraries beginning to shift the emphasis away from fixed computers towards providing study spaces suitable for users to bring their own devices. In particular, 63 institutions (43%) of the 146 providing detail in both 2014-15 and 2016-17 reported a lower proportion of seats equipped with a workstation in the most recent year compared to 2014-15. Library provision of laptops/tablets for short-term loan is also an ongoing trend – with 94 respondents (65%) indicating they offered this service in 2015-16, compared to 103 respondents (69%) in the most recent year. It is worth noting that in 2016-17, only nine UK respondents (6%) indicated that their institution provides laptops/tablets for short-term loan, but this service is not provided via the library.

Examination of the trends over the last few years emphasises that UK academic libraries continue to experience a great deal of change. Electronic resources are now an increasingly central part of library services at UK higher education institutions. However, the impact of ongoing technological advances, and changing user attitudes as a result, continues to drive the evolution of the academic library. Despite the challenges academic libraries have faced over the last ten to fifteen years, the sector is showing a continuous ability to adapt and be flexible in meeting the demands of the digital era, with the academic library of today virtually unrecognisable compared to its counterpart of thirty years ago. However, despite the possibility of remote access to resources, sustaining visitor levels emphasise that the university library remains at the heart of academic and student life.

Acknowledgements

The above report is an excerpt from the 2016-17 SCONUL Annual Library Statistics, prepared for SCONUL by Sonya White with assistance from Elizabeth Malone (Kingston University) and Ruth Stubbings (SCONUL) at the request of SCONUL and published by SCONUL in 2018.