

LIBRARIES ACHIEVE EQUILIBRIUM BETWEEN DIGITAL AND PRINT AS BUDGETS ADVANCE

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY
ON 2016 COMMUNITY PUBLIC LIBRARY SPENDING

By Joseph McKendrick, Research Analyst
Produced by Unisphere Research, a division of Information Today, Inc.



TABLE OF CONTENTS

<i>Highlights</i>	3
<i>Public Library Finances: A Good Time for Smaller Libraries</i>	4
<i>Digital Library Trends</i>	14
<i>Customer Service Remains the Key Strategy</i>	25
<i>Demographics</i>	31
<i>Acknowledgements</i>	33

HIGHLIGHTS

This new study of 284 community public library managers and librarians was conducted by the *Library Resource Guide (LRG)*—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, which was administered during the September–November 2015 time period among libraries listed in ITI’s *American Library Directory*, reveals current spending patterns for public, academic, government, and special libraries, and provides projections for budgets and spending trends for 2016. This report is a subset of a larger study, which included a total of 827 libraries, including academic, special, and government agency libraries, along with public libraries.

More than one-third of respondents to the survey of community public libraries, 35%, are directors and administrators of public libraries, and another 21% are managers or department heads. Another 19% of respondents have the title of chief librarian or librarian. Libraries covered in the survey represent a range of structures, sizes, and segments. Close to half are single, independent, or standalone libraries, while another 12% are single facilities that are part of a larger multi-branch or multi-campus system. About 28% of respondents are reporting for entire library systems with multiple branches and facilities. (For detailed demographic breakdowns, see Figures 34–36 at the end of this report.)

More than one-third, 34%, serve populations of fewer than 25,000 constituents, and 33% serve between 25,000 and 100,000 people. Another 31% serve more than 100,000 people. About 11% are in libraries serving communities with more than 500,000 people.

Key findings from the survey include the following:

- Public library budgets are strong and getting stronger. After suffering in the years following the 2008–2009 recession, municipal or local support has strengthened, and many aspects of public library operations and offerings have been expanding.
- Ebook demand has peaked and is trailing off, but momentum toward digital has not slowed. More than two in five libraries are taking advantage of cloud-based computing resources to expand their communications and infrastructure. Investment in 3D printing facilities tops public library purchasing plans for the year ahead. More than one-third of public library managers indicate they will be adopting 3D printers and associated tools, signaling that this category is a priority for 2016.
- Service is the mantra repeated among public libraries these days. There’s a renewed push to deliver greater customer service, as well as education on using the digital tools and platforms that are now part of today’s libraries. Some libraries are also employing business approaches to managing their futures—half of public libraries engage in long-term strategic planning, and one in four measures the return on investment seen from their programs.

On the following pages are the results of the survey, reflecting the balance today’s libraries are striving to achieve.

PUBLIC LIBRARY FINANCES: A GOOD TIME FOR SMALLER LIBRARIES

Public library budgets are strong and getting stronger. After suffering in the years following the 2008–2009 recession, municipal or local support has strengthened, and many aspects of public library operations and offerings have been expanding.

More than two-thirds of respondents to the survey, 67%, indicate they have some level of budget and spending authority within their facilities. (See Figure 1.)

The survey explored annual budget numbers from two perspectives: through reported ranges, and by averaging exact reported annual budgets. Overall, 47% of respondents report budgets exceeding \$1 million a year, up from 41% a year ago, but still within the same general range seen in the survey series since the first one was conducted in 2011. (See Figure 2.)

In terms of reported averages, however, there has been an upward trajectory seen in public library budgets in recent years. In the last year in particular, average reported budgets among single, standalone libraries jumped 20%, to an average of \$1.2 million, while those that are part of larger systems jumped 42% to \$1.9 million. While there may be some volatility in these numbers due to changes in the year-to-year response bases, the upward movement of these numbers suggests many community public libraries have been recipients of greater funding from their municipalities due to an improving economy. (See Figure 3.) Notably, this has especially been the case for libraries in the smallest communities, which have suffered the long-term effects of the recessionary years of 2008–2009. Libraries in the largest communities are the exception, however, as their annual budgets have continued to gradually shift downward. (See Figure 4.)

Personnel and staffing costs continue to be the largest chunk of public library budgets. On average, 60 cents out of every dollar in public community libraries goes to human resource costs, up somewhat from last year's 55 cents. Operational costs and content acquisitions each command 13 cents of every dollar spent, which is actually a smaller piece of the pie for these functions and services. (See Figure 5.)

Print materials still dominate the content acquisitions portions of public library budgets. Sixty percent of these annual budgets go to either printed books or print periodicals. This is down from 63% a year ago and 70% in the first survey conducted in 2011. Still, print dominates. About 15 cents of every content acquisition dollar spent by public libraries goes to digital material—online databases or ebooks. This has been relatively unchanged over the past 2 years, but still up from 8% from 5 years ago. (See Figure 6.)

The larger the library, the more likely that it is making the shift to purchases of digital-related material. On average, 22% of budgets for libraries in larger municipalities are going to online materials and ebooks, versus 11% of their smaller counterparts. (See Figure 7.)

Public library budget growth remains strong. About half, 48%, report their budgets are up this year, compared to only 16% reporting decreases. The percentage reporting budget declines is down from 21% a year ago, and only 12% anticipate declines over the coming year. (See Figure 8.)

Overall, two in five public library managers indicated they did not have to make any cuts in any areas over the past year. Where they did happen, the most prominent area was print subscriptions, with 24% reporting cutbacks. This is down from 28% a year ago, and a peak of 46% in 2012. The next kind of action taken was to apply for more grant money, cited by 21%, though there has also been a reduction in this activity. Another 21% of respondents have had to cut back on travel and education expenses, down drastically from 48% making such cuts in fiscal 2012. (See Figure 9.) While smaller libraries have been more aggressive about scaling back on print subscriptions, the libraries in the larger communities have been more active in seeking additional revenue sources while also cutting back on staff training and travel. (See Figure 10.)

There has been a dramatic boost in financial support for a number of areas and services offered by public libraries over the past year. Spending is up for many aspects—content, operations, and equipment—across the board, the survey finds. A majority of public library managers, 54%, say they have increased their spending on personnel and staffing, up from 31% last year and marking the highest level since the survey was first launched 5 years ago. Two areas now appearing in many public libraries are multimedia and streaming media capabilities (rising from 3% of libraries when this survey was first fielded to 14% today) and 3D printing facilities (rising from 2% 2 years ago to 12% today). (See Figure 11.) Libraries in mid-sized communities (serving municipalities with between 25,000 and 100,000 people) were the most likely to boost their spending in these areas. (See Figure 12.)

Nine in 10 of the community public libraries in this survey receive most of their funding directly from their local municipalities. More than two in five also report receiving help at the state level. These figures have been relatively stable over the past five surveys. However, there appear to be fewer private sources of funding. About one-third are relying on gifts and donations to meet their budgets, but this is down from the 40% range seen in previous surveys. Likewise, one-third are receiving grants, which has been a level essentially unchanged in recent years. (See Figure 13.)

Figure 1: Respondents' Roles in Managing Public Library Budgets

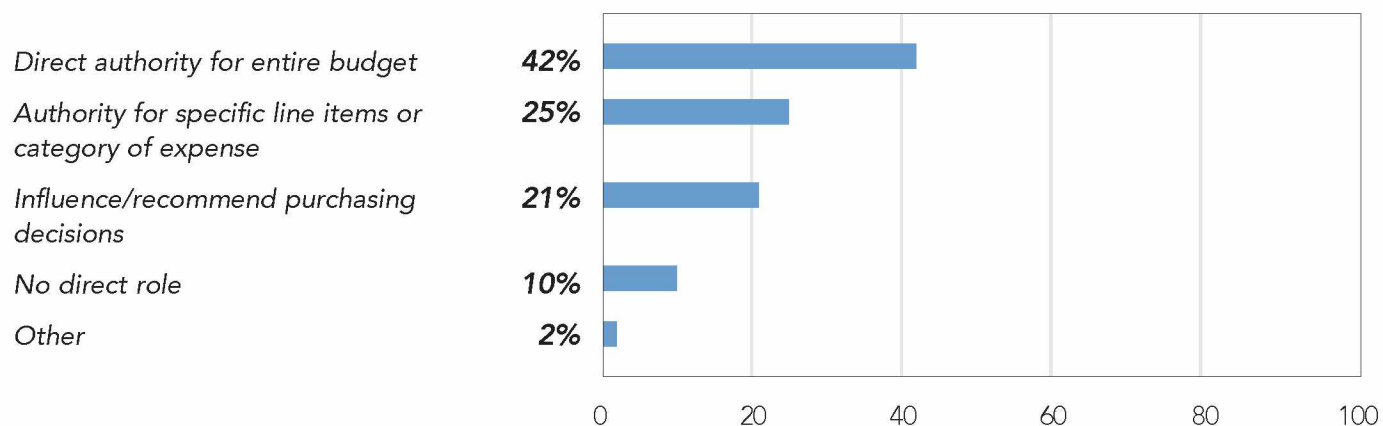


Figure 2: Annual Public Library Budget Ranges

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

	2011	2012	2013	2015	2016
Less than \$100,000	—	11%	10%	18%	11%
\$100,000 to \$500,000	36%*	25%	21%	23%	22%
\$500,000 to \$1,000,000	17%	11%	13%	15%	12%
\$1 million to \$3 million	21%	23%	20%	21%	23%
\$3 million to \$5 million	6%	6%	10%	7%	9%
More than \$5 million	17%	18%	19%	13%	15%
Don't know/unsure	4%	5%	7%	3%	7%

*Reported category was "less than \$500,000" in 2011 survey.

Figure 3: Average Budgets—By Library Structure and Segment

SINGLE, INDEPENDENT OR STANDALONE LIBRARIES

	2011	2012	2013	2015	2016	% CHANGE
Public	\$744,974	\$879,090	\$1,015,061	\$922,104	\$1,200,663	+30.2%

SINGLE LIBRARIES WITHIN A MULTI-BRANCH/MULTI-CAMPUS SYSTEM

Public	—	\$881,070	\$1,099,465	\$1,312,230	\$1,867,095	+42.3%
--------	---	-----------	-------------	-------------	-------------	--------

Figure 4: Annual Public Library Budget Ranges

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

	2012	2013	2015	2016	% CHANGE
<25,000	\$382,160	\$435,000	\$428,100	\$662,842	+54.8%
25,000 to 100,000	\$1,640,237	\$2,361,180	\$2,705,300	\$2,874,815	+6.3%
>100,000	\$12,788,614	\$11,547,190	\$10,165,000	\$9,249,733	-9.0%

Figure 5: Allocation of Overall Public Library Budgets

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

	2011	2012	2013	2015	2016
Personnel/staffing	55%	60%	56%	55%	60%
Operations/facilities	17%*	16%	17%	17%	13%
Content acquisitions/collection development	16%	13%	16%	15%	13%
Library systems, computers, A/V, media equipment, software/svcs	7%	5%	7%	8%	5%
Other	1%	1%	4%	4%	1%

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

Figure 6: Allocation of Public Library Content Acquisitions Budgets

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

	2011	2012	2013	2015	2016
<i>Printed books & other printed materials</i>	61%	61%	57%	56%	52%
<i>Serials/periodicals (print)</i>	9%	8%	7%	7%	8%
<i>Online databases, digital content collections</i>	7%	7%	9%	9%	9%
<i>Ebooks</i>	1%	3%	6%	8%	6%
<i>Media titles (video, audio, computer-based modules, etc.)</i>	16%	16%	14%	14%	12%
<i>Special programs</i>	2%	1%	3%	2%	2%
<i>Other (microforms, manuscripts, archives, preservation, etc.)</i>	2%	1%	1%	1%	1%
<i>All other categories</i>	2%	1%	3%	2%	5%

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

Figure 7: Allocation of Public Library Content Acquisitions Budgets —By Community Population Size Served

	<25K	25K–100K	>100K
Printed books & other printed materials	61%	50%	43%
Serials/periodicals (print)	7%	9%	7%
Online databases, digital content collections	7%	11%	13%
Ebooks	4%	7%	9%
Media titles (video, audio, computer-based modules, etc.)	14%	12%	9%
Special programs	3%	2%	2%
Other (microforms, manuscripts, archives, preservation, etc.)	1%	1%	1%
All other categories	2%	5%	9%

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

Figure 8: Changes in Overall Public Library Budgets

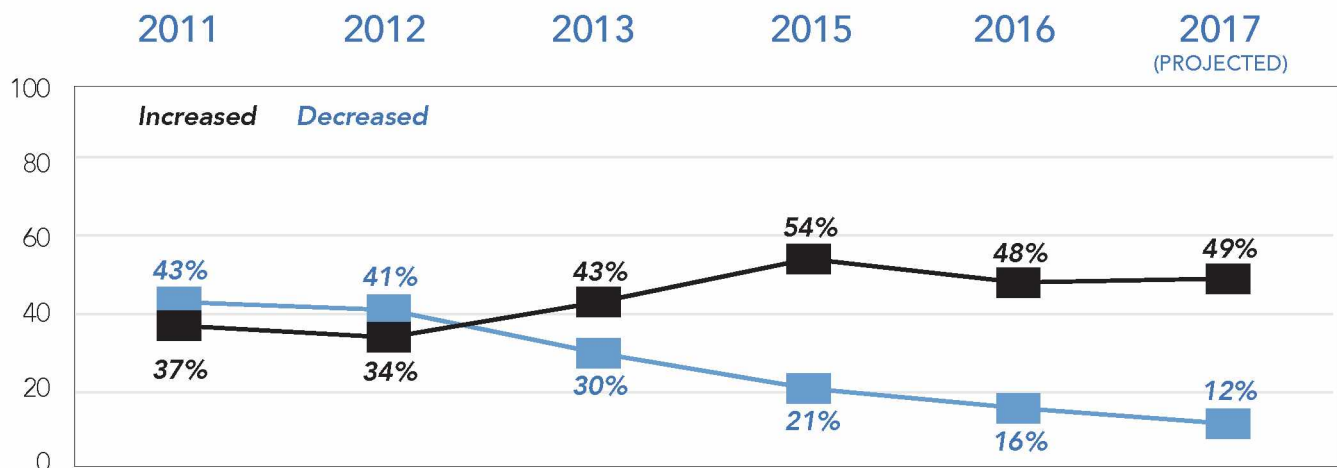


Figure 9: Actions Taken by Public Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

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

	2011	2012	2013	2015	2016
Cut spending on print subscriptions	39%	46%	41%	28%	24%
Applied for more grants	38%	42%	38%	24%	21%
Cut or eliminated conference/travel/education budget	40%	48%	34%	22%	21%
Lobbied for more funding from institutions	17%	19%	15%	10%	14%
Added volunteers	28%	28%	23%	22%	12%
Staff layoffs/staff hours cut	25%	29%	20%	17%	10%
Moved more services/materials online	14%	18%	12%	13%	12%
Cut spending on online subscriptions	—	—	16%	15%	9%
Reduced programming	29%	31%	26%	12%	9%
Reduced library hours	23%	25%	12%	11%	9%
Consolidated departments	11%	17%	11%	9%	8%
Collaborated/shared with other libraries/joined consortia	12%	19%	14%	11%	8%
Renegotiated contracts with vendors	18%	21%	18%	11%	7%
Salary freezes	43%	46%	32%	20%	5%
Reduced IT expenditures	18%	12%	19%	19%	5%
Closed facilities	1%	3%	2%	1%	2%
Don't know/unsure	2%	1%	4%	2%	2%
Other	9%	7%	7%	6%	6%
No cuts/budget freezes over past year	23%	21%	20%	40%	39%

(Multiple responses permitted.)

Figure 10: Actions Taken by Public Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year
—By Population Sized Served

	<25K	25K–100K	>100K
Cut spending on print subscriptions	36%	19%	16%
Applied for more grants	19%	13%	29%
Cut or eliminated conference/travel/education budget	19%	13%	32%
Added volunteers	17%	3%	16%
Salary freezes	5%	6%	3%
Reduced IT expenditures	2%	2%	6%
Staff layoffs/staff hours cut	10%	6%	13%
Cut spending on online subscriptions	5%	3%	23%
Reduced programming	7%	3%	16%
Renegotiated contracts with vendors	0%	9%	13%
Lobbied for more funding from institutions	12%	13%	19%
Collaborated/shared with other libraries/joined consortia	2%	6%	19%
Reduced library hours	5%	16%	6%
Moved more services/materials online	7%	13%	16%
Consolidated departments	5%	3%	16%
Closed facilities	2%	3%	0%
Don't know/unsure	5%	9%	6%
Other	4%	9%	6%
No cuts/budget freezes over past year	40%	41%	39%

(Multiple responses permitted.)

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

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

	2011	2012	2013	2015	2016
Personnel	25%	25%	27%	31%	54%
Ebooks	18%	52%	51%	45%	39%
Library technology equipment, software	16%	19%	19%	24%	38%
Digital content collections/services	9%	17%	15%	20%	27%
Facilities upgrades/maintenance	14%	9%	15%	10%	27%
Book acquisitions	12%	12%	8%	11%	23%
Operations	11%	9%	9%	13%	21%
Online subscriptions acquisitions	10%	9%	10%	17%	17%
IT services	8%	11%	11%	13%	15%
Multimedia/streaming media	3%	2%	3%	8%	14%
3D printing facilities/makerspaces	—	—	2%	2%	12%
Special career or business development assistance programs	—	—	2%	3%	3%
Library hours/availability	8%	4%	1%	6%	9%
Don't know/unsure	5%	2%	3%	3%	5%
Periodicals/serials acquisitions	4%	3%	1%	3%	5%
Cloud-based solutions	1%	3%	7%	5%	5%
Other	7%	3%	6%	6%	5%
Print subscription acquisitions	—	2%	0%	1%	4%
No areas seeing increased spending/support	34%	25%	23%	23%	9%

(Multiple responses permitted.)

Figure 12: Areas Seeing Increased Spending or Support in Public Libraries Over the Past Year—By Population Size Served

	<25K	25K–100K	>100K
Personnel	56%	56%	48%
Ebooks	26%	53%	39%
Library technology equipment, software	28%	53%	32%
Digital content collections/services	9%	44%	29%
Online subscriptions acquisitions	12%	24%	19%
IT services	14%	15%	16%
Operations	19%	21%	19%
Book acquisitions	23%	32%	13%
Facilities upgrades/maintenance	21%	38%	26%
Multimedia/streaming media	2%	15%	26%
Cloud-based solutions	2%	9%	3%
3D printing facilities/makerspaces	7%	9%	19%
Special career or business development assistance programs	0%	0%	10%
Print subscription acquisitions	0%	3%	10%
Don't know/unsure	2%	9%	3%
Periodicals/serials acquisitions	9%	6%	0%
Library hours/availability	12%	6%	6%
Other	2%	7%	6%
No areas seeing increased spending/support	12%	3%	13%

(Multiple responses permitted.)

Figure 13: Primary Sources of Public Library Funding

	2011	2012	2013	2015	2016
<i>Public funding-local</i>	92%	96%	88%	94%	89%
<i>Public funding-state</i>	46%	41%	41%	46%	43%
<i>Gifts and donations</i>	44%	43%	42%	41%	34%
<i>Grants</i>	41%	38%	37%	32%	34%
<i>Fee-based services</i>	9%	14%	17%	12%	15%
<i>Special fundraising events</i>	16%	18%	19%	11%	12%
<i>Public funding-federal</i>	10%	9%	17%	9%	15%
<i>Endowments</i>	11%	12%	19%	8%	12%
<i>Corporate funding</i>	1%	7%	3%	1%	4%
<i>IT fees</i>	—	2%	1%	1%	0%
<i>Don't know/unsure</i>	1%	0%	1%	1%	2%
<i>Other</i>	8%	7%	7%	5%	8%

(Multiple responses permitted.)

DIGITAL LIBRARY TRENDS

Ebook demand has peaked and is trailing off, but momentum toward digital has not slowed. More than two in five libraries are taking advantage of cloud-based computing resources to expand their communications and infrastructure. Investment in 3D printing facilities tops public library purchasing plans for the year ahead. More than one-third of public library managers indicate they will be adopting 3D printers and associated tools, signaling that this category is a priority for 2016.

Public libraries continue to see a shift in their patrons' preferences toward electronic or digital-based offerings. Close to four in five report that demand for electronic material continues to rise. In contrast, only 28% of public libraries are seeing more demand for print-based resources—down from 33% in last year's survey, and 67% in 2011, the first year of this survey series. (See Figure 14.)

This may be the age of the digital library, but it is possible that demand for ebooks has already peaked. Wireless access for patrons tops the list of services or materials most in demand this past year, reported by 77% of library managers. Another 76% report that ebooks are the items most requested, which is down from 84% last year, and from the peak of 87% in the 2013 survey. Libraries also continue to serve as computer centers for many communities, with a majority, 52%, using these services. However, this is down from 77% 5 years ago, suggesting that the mobile revolution has reduced the amount of patrons seeking to borrow PCs. Fewer community members are coming into libraries for job-search assistance (46% this past year, versus 76% 5 years ago), reflecting the stronger economy. Interestingly, more than one in four libraries (27%), now report that patrons have been seeking 3D printing or makerspace facilities, up from 4% seeing this kind of request a year ago. (See Figure 15.) Demand for these services is strongest among mid-sized community libraries. (See Figure 16.)

While today's library offerings and operations are being defined in electronic or digital terms, it's notable that few public libraries are actually devoting significant portions of the budgets for the acquisition of these resources. About 11% of public libraries spend a significant share of their acquisitions budgets (defined as more than 25% of annual budget) on electronic resources, relatively unchanged over the past 3 years. (See Figure 17.) However, this spending is far more pronounced at larger community libraries—26% of library managers in the largest community settings (more than 100,000 people) report spending large portions of their budgets for electronic resources, versus only 2% of the smallest libraries. (See Figure 18.)

The relatively low percentage of public library budgets being spent on electronic resources should not be seen as minimizing the growing impact of electronic and digital services and offerings. Close to half of public library managers, 48%, report increased spending on IT equipment, software, and services, continuing this strong spending trend. (See Figure 19.) In addition, more than one-third, 36% are also increasing their spending for online subscriptions and will continue to do so in the year ahead. (See Figure 20.)

Cloud computing is another approach that is reshaping the way public libraries manage and deliver services. Currently, 44% report either already using cloud services, or making preparations to do so in the near future. This is about the same as last year, reflecting the widespread adoption of this kind of computing. (See Figure 21.) In most cases, these investments are for IT infrastructure, handling storage, or processing in the cloud. There is also adoption of cloud-based services to enable better communications and collaboration. (See Figure 22.)

There are a variety of technology platforms and tools now in use at public libraries. Online library catalogs are ubiquitous within more than nine out of 10 libraries, and wireless networks are also prevalent, seen at 80% of sites. Integrated library systems (ILSs) are seen in more than three-fourths, serving as electronic systems of record for collections and resources. The use of 3D printing or makerspace offerings is now seen in 33% of public libraries, up more than four-fold from last year's survey. (See Figure 23.) Adoption of many of these leading solutions or platforms is common across all sizes of libraries. (See Figure 24.)

Investment in 3D printing facilities tops public library purchasing plans for the year ahead. More than one-third of public library managers indicate they will be adopting 3D printers and associated tools. Another 31% will also be purchasing PCs and computing devices, but this is down from the previous year. (See Figure 25.) Public social networking platforms—such as Facebook, LinkedIn, and Twitter—are in use at close to three-fourths of public libraries, the survey finds. (See Figure 26.)

Figure 14: Change in Demand for Public Library Print and Electronic Offerings

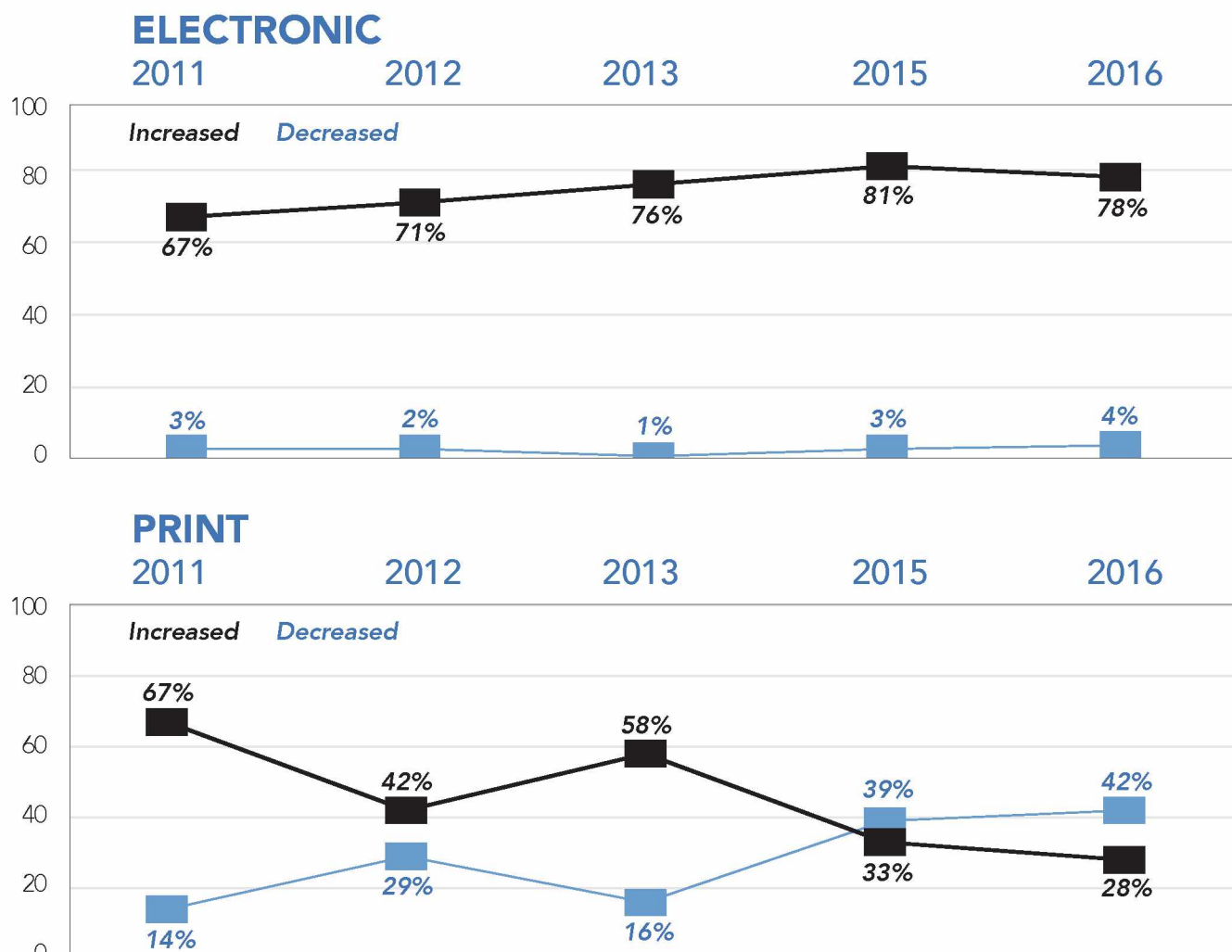


Figure 15: What Public Library Patrons Have Been Requesting Over the Past Year

	2011	2012	2013	2015	2016
<i>Wireless access</i>	84%	83%	84%	79%	77%
<i>Ebooks</i>	43%	81%	87%	84%	76%
<i>Computer/web access</i>	77%	69%	67%	60%	52%
<i>Job search/career development information</i>	76%	68%	59%	49%	46%
<i>Technical information/training</i>	41%	35%	50%	39%	43%
<i>Audiobooks</i>	64%	55%	47%	41%	35%
<i>Streaming media</i>	11%	21%	24%	18%	30%
<i>3D printing/makerspaces or labs</i>	—	—	2%	4%	27%
<i>Computer games/simulations</i>	26%	25%	25%	23%	27%
<i>Support for online education/massive open online courses</i>	—	—	31%	23%	20%
<i>English language instruction</i>	22%	14%	20%	17%	20%
<i>Primary and continuing education programs/requirements</i>	21%	19%	18%	13%	13%
<i>Medical</i>	12%	11%	20%	10%	11%
<i>Don't know/unsure</i>	3%	3%	2%	5%	7%
<i>Other</i>	3%	0%	0%	2%	1%

(Multiple responses permitted.)

Figure 16: What Public Library Patrons Have Been Requesting Over the Past Year—By Community Population Size Served

	<25K	25K–100K	>100K
<i>Wireless access</i>	79%	89%	61%
<i>Ebooks</i>	67%	95%	68%
<i>Computer/web access</i>	56%	41%	56%
<i>Support for online education/MOOCs</i>	21%	14%	24%
<i>Job search/career development information</i>	40%	54%	46%
<i>Audiobooks</i>	35%	46%	24%
<i>Technical information/training</i>	40%	38%	51%
<i>Computer games/simulations</i>	23%	35%	27%
<i>Streaming media</i>	17%	46%	27%
<i>Primary and continuing education programs/requirements</i>	10%	8%	17%
<i>English language instruction</i>	15%	24%	22%
<i>Medical</i>	13%	11%	10%
<i>3D printing/makerspaces or labs</i>	17%	35%	34%
<i>Don't know/unsure</i>	4%	0%	17%
<i>Other</i>	0%	2%	2%

(Multiple responses permitted.)

Figure 17: Percentage of Acquisitions Budgets Spent on Electronic Resources

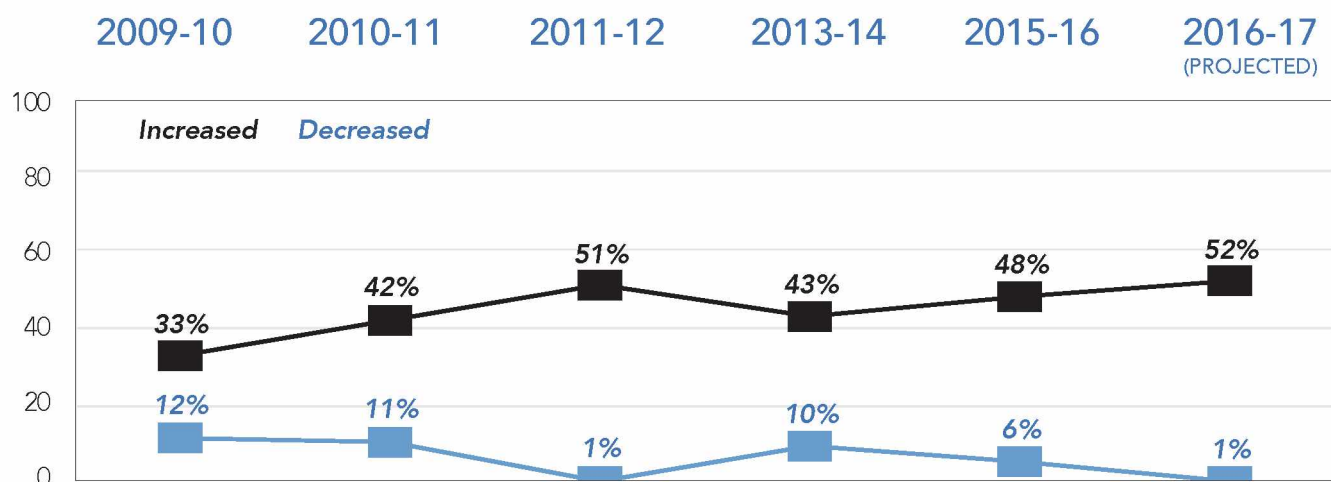
	2011	2012	2013	2015	2016
<10%	57%	53%	46%	44%	30%
11% to 25%	22%	30%	27%	35%	40%
26% to 50%	2%	5%	7%	9%	8%
>50%	0%	0%	2%	1%	3%
Don't know/unsure	18%	12%	19%	12%	18%

Figure 18: Percentage of Public Library Acquisitions Budgets Spent on Electronic Resources
—By Community Population Size Served

	<25K	25K–100K	>100K
<10%	63%	14%	8%
11% to 25%	29%	65%	31%
26% to 50%	2%	5%	18%
>50%	0%	3%	8%
Don't know/unsure	6%	14%	36%

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

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



(*Not including online subscriptions)

Figure 20: Change in Library Spending on Online Subscriptions

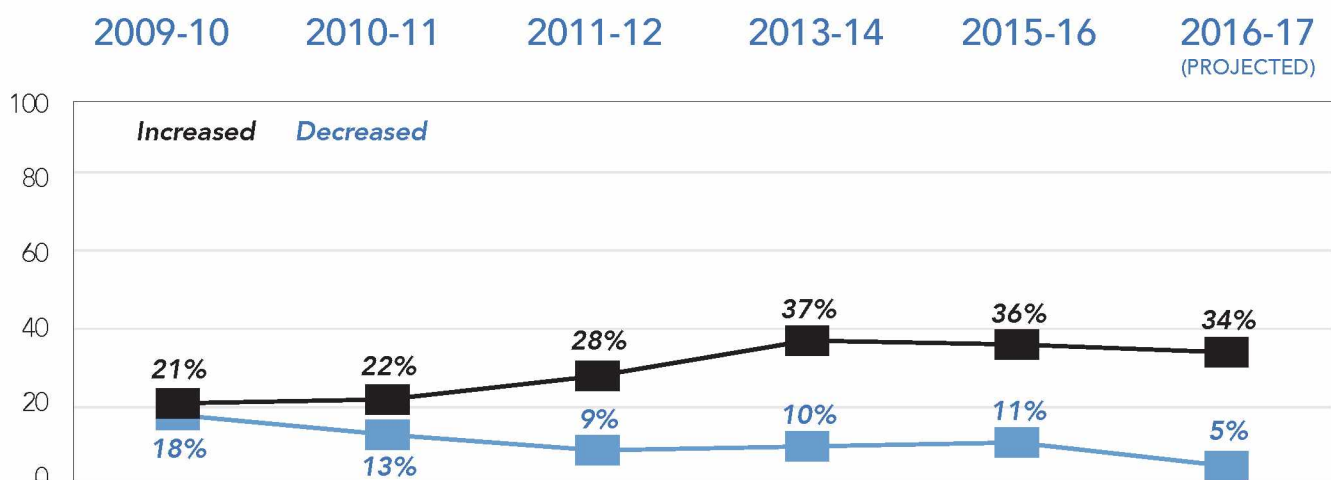


Figure 21: Percentage of Public Libraries Currently Using or Planning to Use Cloud Computing Resources

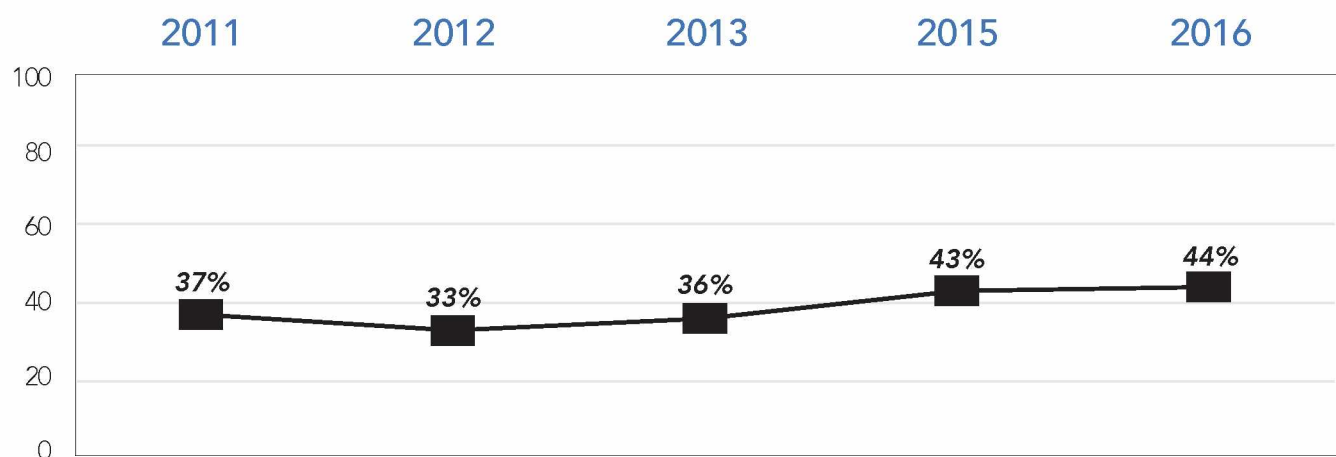


Figure 22: Cloud Computing Services Used or Planned for Use by Public Libraries

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

	2011	2012	2013	2015	2016
<i>IT infrastructure (online storage, processing)</i>	12%	29%	40%	36%	44%
<i>Communications (web conferencing, video, podcasting)</i>	15%	35%	37%	35%	38%
<i>Specialized business applications (business management marketing, market research)</i>	8%	9%	17%	11%	16%
<i>Don't know/unsure</i>	76%	55%	46%	46%	46%
<i>Other</i>	3%	5%	7%	7%	4%

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

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

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

	2011	2012	2013	2015	2016
Online library catalog/OPAC	93%	95%	97%	92%	93%
LAN/WAN/wireless network	87%	85%	85%	78%	80%
Integrated Library System (ILS)	77%	87%	81%	72%	78%
PCs/kiosks/laptops/mobile devices	67%	74%	72%	71%	70%
Intranet/extranet/website	64%	73%	65%	68%	63%
Ebook readers	17%	36%	48%	44%	44%
Web-based (IM or email) reference service	45%	46%	42%	39%	43%
RFID check-in/check-out, inventory control	20%	24%	28%	27%	34%
3D printers/makerspaces	—	—	2%	7%	33%
Audio/video teleconferencing	16%	22%	32%	23%	25%
Authentication solutions	14%	23%	28%	21%	28%
Electronic Resource Management System	10%	7%	12%	15%	19%
Web-scale management system	—	—	17%	9%	14%
Discovery services	4%	4%	8%	8%	16%
Link resolvers	4%	7%	7%	7%	7%
Other	2%	1%	2%	2%	4%

(Multiple responses permitted.)

Figure 24: Current Information Technology Tools and Platforms Used Within Public Libraries—By Community Population Size

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

	<25K	25K–100K	>100K
Online library catalog/OPAC	93%	100%	85%
LAN/WAN/wireless network	80%	92%	69%
Integrated Library System (ILS)	76%	89%	74%
PCs/kiosks/laptops/mobile devices	67%	70%	72%
Intranet/extranet/website	38%	84%	72%
Ebook readers	44%	38%	49%
Web-based (IM or email) reference service	27%	49%	59%
RFID check-in/check-out, inventory control	20%	38%	46%
3D printers/makerspaces or labs	20%	32%	46%
Audio/video teleconferencing	22%	27%	28%
Authentication solutions	13%	32%	44%
Electronic Resource Management System	11%	14%	31%
Web-scale management system	7%	14%	21%
Discovery services	2%	22%	28%
Link resolvers	2%	5%	13%
Other	2%	2%	7%

(Multiple responses permitted.)

Figure 25: Information Technology Tools and Platforms to be Purchased by Public Libraries This Year

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

	2011	2012	2013	2015	2016
3D printers/makerspaces or labs	—	—	—	14%	34%
PCs/kiosks/laptops/mobile devices	35%	41%	43%	42%	31%
LAN/WAN/wireless network	16%	13%	11%	20%	22%
Ebook readers	31%	46%	47%	25%	18%
RFID check-in/check-out, inventory control	13%	15%	16%	15%	17%
Integrated Library System (ILS)	18%	22%	23%	21%	16%
Online library catalog/OPAC	20%	22%	19%	27%	14%
Intranet/extranet/website	15%	13%	20%	17%	14%
Discovery services	3%	3%	11%	5%	11%
Audio/video teleconferencing	10%	12%	10%	9%	11%
Web-based (IM or email) reference service	7%	6%	10%	7%	3%
Authentication solutions	5%	5%	11%	5%	4%
Electronic Resource Management System	5%	2%	8%	3%	2%
Web-scale management system	—	—	—	6%	9%
Link resolvers	3%	1%	1%	2%	1%
Other	1%	11%	12%	13%	12%

(Multiple responses permitted.)

Figure 26: Online, Cloud or Social Networking Services in Use at Public Libraries

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

	2011	2012	2013	2015	2016
Social networking (e.g., Facebook, LinkedIn)	62%	66%	70%	73%	73%
Patron reviews, ratings	36%	40%	45%	35%	31%
Wikis or blogs	38%	30%	27%	20%	26%
Photo or video-sharing web apps	14%	24%	21%	19%	21%
Audio or video podcasts	18%	15%	20%	12%	21%
Sharing library web pages and subject guides (e.g., LibGuides)	11%	11%	22%	15%	17%
Document-sharing web apps	12%	14%	16%	13%	16%
Don't know/unsure	23%	24%	14%	13%	17%
Tagging and rating	11%	8%	18%	6%	12%
Other	2%	0%	0%	1%	0%
We don't offer social networking tools/opportunities	9%	10%	12%	7%	2%

(Multiple responses permitted.)

CUSTOMER SERVICE REMAINS THE KEY STRATEGY

Service is the mantra repeated among public libraries these days. There's a renewed push to deliver greater customer service, as well as education on using the digital tools and platforms that are now part of today's libraries. Some libraries are also employing business approaches to managing their futures—half of public libraries engage in long-term strategic planning, and one in four measures the return on investment seen from their programs.

In terms of priorities, public library managers are most focused on improving the customer service they deliver to members of their communities. Three in five indicated this is a priority for the year ahead, as they increasingly evolve into digital resource centers above and beyond physical tables and chairs. Reaching out to new groups of patrons in their communities is seen as an important mission, as is the repurposing of the actual physical space. Many libraries see their roles evolving past simply warehouses of physical books, and more as providers of meeting and collaboration spaces, as well as 3D printing and makerspace facilities. (See Figure 27.)

For public libraries, tight budgets are the greatest challenge going forward. While the survey shows a surge in spending at public libraries over the past year, library managers need to re-think many of the ways they offer services and materials to deliver more for less. A potential talent drain is another area of concern—many of these managers are focused on their ability to keep or attract the talent needed to move their libraries full-

throttle into the digital era. (See Figure 28.) These challenges are being faced across the board, regardless of the size of their communities. (See Figure 29.)

A majority of public libraries report they have adopted strategic plans to guide their efforts going forward. More than half now do such planning, mainly led by libraries in larger institutions. (See Figures 30 and 31.)

Another key aspect of addressing library requirements is measuring and determining the value of various initiatives. Currently, about 26% of public libraries have mechanisms or processes to measure return on investment and another 22% are considering doing so. (See Figure 32.)

There also has been a slight rise in the percentage of public libraries relying on consortia or networks to share content and materials. Twenty-eight percent of respondents say their reliance on consortia has increased over the past year, up from 22% a year ago and from 23% in 2011, the first year the survey was conducted. (See figure 33.)

Figure 27: Public Libraries' Priorities for the Coming Year

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

	2011	2012	2013	2015	2016
Improve/expand customer service	59%	64%	68%	56%	61%
Identify and reach out to new groups of patrons	43%	49%	46%	45%	47%
Repurpose physical space	30%	31%	39%	41%	46%
Drive usage of current resources	36%	38%	40%	43%	44%
Provide assistance/education on information access tools/services	40%	44%	52%	40%	41%
Enhance discovery of collections	34%	32%	40%	36%	36%
Institute special programs for constituents/patrons	27%	29%	33%	25%	29%
Physical expansion/upgrade of facilities	22%	21%	27%	25%	28%
Increase availability of online pubs/digital access	30%	19%	49%	45%	27%
Join or increase participation in consortium/network	14%	18%	16%	13%	11%
Provide support for online education/MOOCs	—	—	—	13%	11%
Develop unique library collections	11%	16%	17%	12%	12%
Enhancing user workflow tools	17%	5%	15%	9%	9%
Don't know/unsure	4%	4%	5%	4%	8%
Other	4%	4%	4%	7%	2%

(Multiple responses permitted.)

Figure 28: Public Libraries' Challenges Over the Next 5 Years

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

	2011	2012	2013	2015	2016
<i>Maintaining services with tight budgets</i>	87%	82%	78%	77%	71%
<i>Keeping up with changes in information technology</i>	66%	73%	75%	79%	69%
<i>Finding and retaining knowledgeable staff</i>	39%	38%	46%	40%	48%
<i>Identifying new sources of funding</i>	54%	52%	58%	50%	38%
<i>Competing/keeping up with public online services/offering</i>	34%	45%	51%	39%	37%
<i>Keeping facilities open/at preferred operational levels</i>	49%	43%	35%	36%	23%
<i>Migrating print content to digital formats</i>	18%	23%	27%	17%	15%
<i>Other</i>	4%	1%	3%	3%	5%

(Multiple responses permitted.)

Figure 29: Public Libraries' Challenges Over the Next 5 Years —By Community Population Size

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

	<25K	25K–100K	>100K
Maintaining services with tight budgets	78%	65%	70%
Keeping up with changes in information technology	73%	65%	65%
Identifying new sources of funding	37%	35%	45%
Competing/keeping up with public online services/offerings	43%	27%	35%
Finding and retaining knowledgeable staff	43%	49%	55%
Keeping facilities open/at preferred operational levels	20%	22%	25%
Migrating print content to digital formats	14%	11%	20%
Other	6%	8%	2%

(Multiple responses permitted.)

Figure 30: Percentage of Public Libraries With Strategic Plans

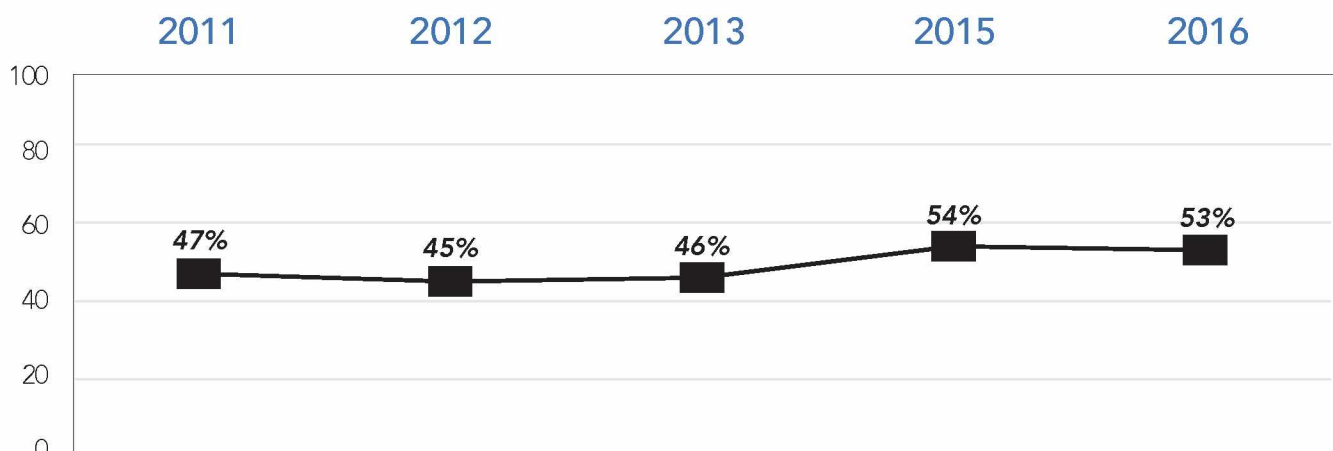


Figure 31: Public Library Have Strategic Plan —By Community Population Size

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

	<25K	25K–100K	>100K
Yes	52%	49%	60%
Under development	24%	30%	15%
Under consideration	6%	0%	5%
No	12%	11%	5%
Don't know/unsure	6%	11%	15%

(Totals may not equal 100% due to rounding)

Figure 32: Measure Return on Investment on Programs and Activities?

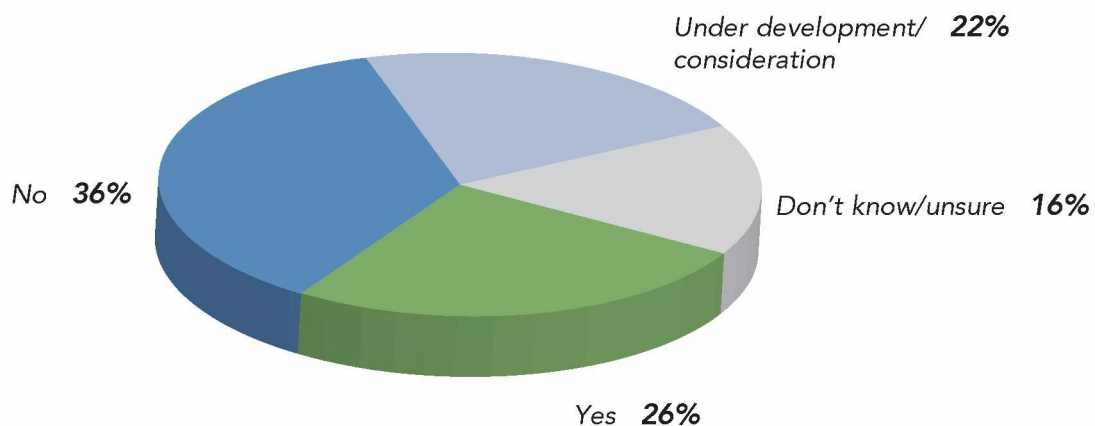


Figure 33: Change in Support from Consortia or Networks for Public Libraries Over Past Year

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

	2011	2012	2013	2015	2016
<i>Increased</i>	24%	28%	17%	27%	28%
<i>Decreased</i>	36%	21%	20%	6%	6%
<i>No change</i>	16%	39%	46%	47%	47%
<i>Don't know/unsure</i>	22%	13%	17%	19%	19%

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

DEMOGRAPHICS

Figure 34: Respondents' Titles

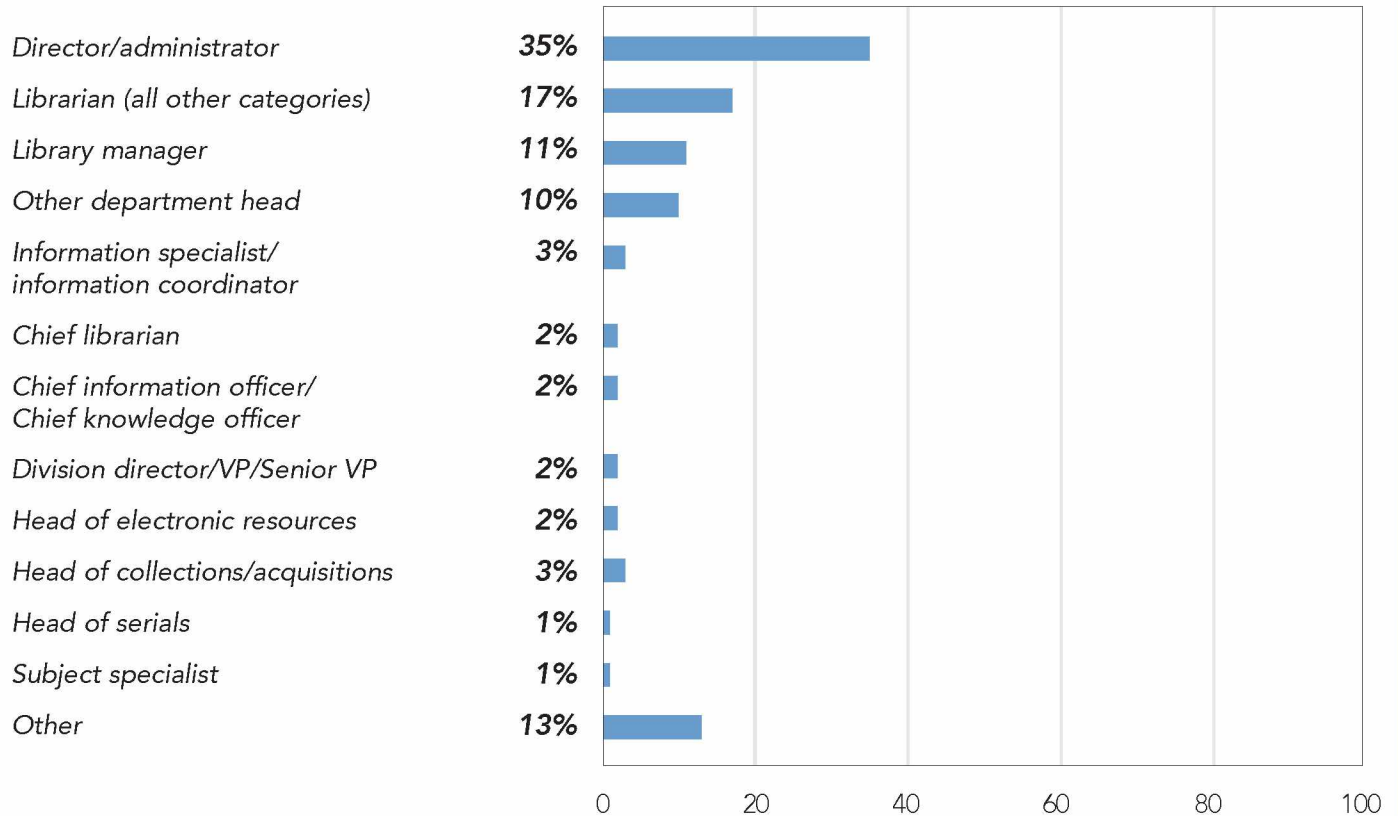


Figure 35: Populations Served

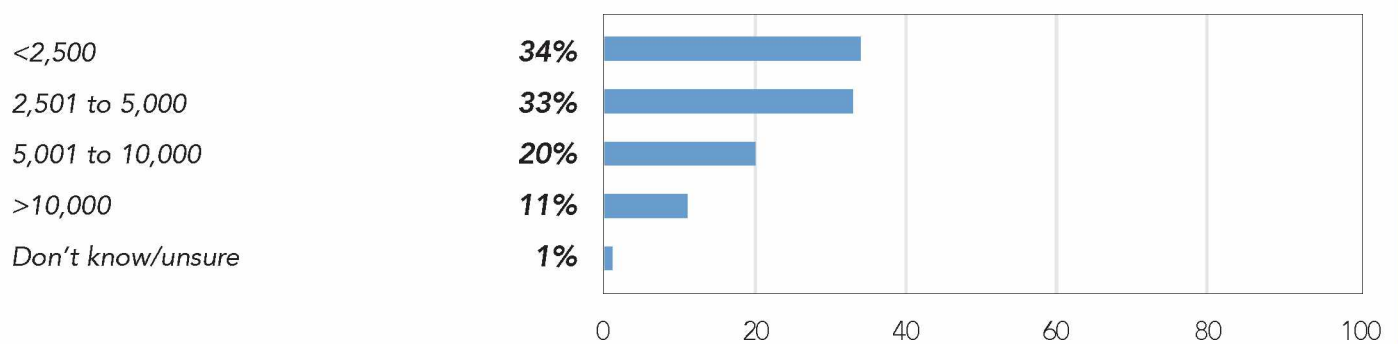
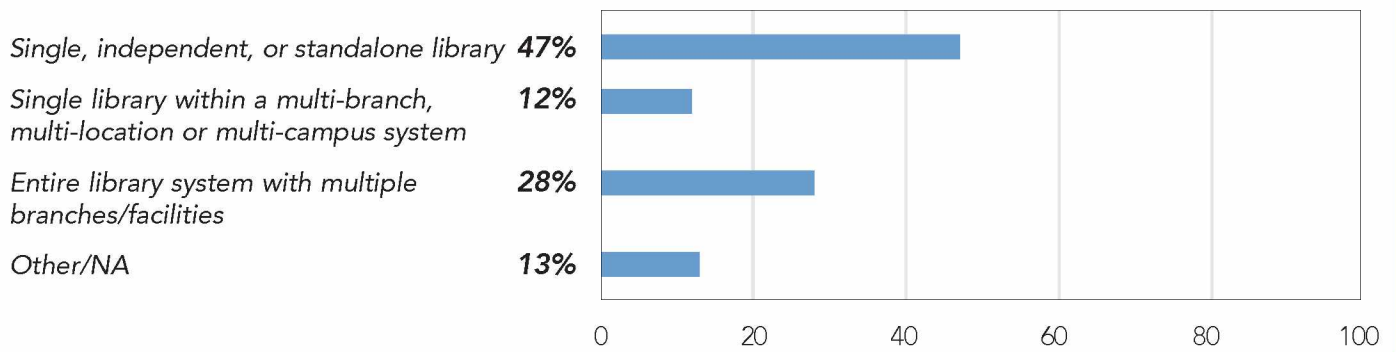


Figure 36: Types of Public Library Infrastructures Surveyed



ACKNOWLEDGEMENTS

“Libraries Achieve Equilibrium Between Digital and Print As Budgets Advance: The Library Resource Guide Benchmark Study on 2016 Community Public Library Spending Plans,” was produced by Unisphere Research. Unisphere Research is

a division of Information Today, Inc. Unisphere Media, 121 Chanlon Road, New Providence, NJ 07974; 908-795-3702. www.infotoday.com

METHODOLOGY

This survey is based on a sample of names drawn from Information Today, Inc.’s American Library Directory database. Respondents were solicited from email notifications to a list of 50,000 individuals at public, academic, government, and special

libraries. Responses were collected in the September–November 2015 time period. A total of 827 valid responses were gathered. This report is based on the responses of 284 respondents with community public libraries.

ABOUT THE RESEARCHERS

LRG’s “Benchmark Study on Library Spending” was conducted by Unisphere Research, the research arm of Information Today, Inc. Since 2004, Unisphere has completed more than 125 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, EMC, SAP, Symantec, Teradata, Informatica, VMware, Tableau Software, Mark Logic, and many others. Unisphere Research is uniquely capable of producing cogent market analysis through this experience and its working relationship with the editors of Information Today, Inc.’s (ITI’s) library products.

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

Project Manager:

Thomas Hogan, Jr., Group Publisher, Unisphere Research, a division of Information Today, Inc.

Principal Researcher:

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

Advisors to the Research Project:

Dick Kaser, Executive Editor, *Computers in Libraries* magazine
Owen O’Donnell, Editorial Director, *American Library Directory*
Catherine Barr, Editor, *Library & Book Trade Almanac*