Library Resource Guide

FUNDING AND PRIORITIES: PUBLIC LIBRARIES

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2011 LIBRARY SPENDING PLANS

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Funding and Priorities: The Library Resource Guide Benchmark Study on 2011 Library Spending Plans was produced by Unisphere Research and sponsored by ProQuest. Unisphere Research is the market research unit of Unisphere Media, a division of Information Today, Inc., publishers of *Database Trends and Applications* magazine and the *5 Minute Briefing* newsletters. Unisphere Media, 229 Main Street, Chatham, NJ 07928. Tel: 973-665-1120, Fax: 973-665-1124, Email: Tom@dbta.com, Web: www.dbta.com.

Data collection and analysis performed with SurveyMethods.

EXECUTIVE SUMMARY

Public libraries—which rely on funding from cash-strapped local municipalities or counties—have been particularly susceptible to the recent economic downturn. Many have been forced to cut offerings and freeze staff salaries while others have turned to alternative sources of funding such as grants and fundraisers to avoid severely cutting services. Looking forward, however, fewer libraries anticipate that they will be facing cutbacks in 2011. Indeed, many libraries are coming through the crunch with much of their budgets intact and are even ramping up spending on technological and digital solutions to deliver information and services as part of a longer-term realignment with the needs of their constituents.

These are just some of the conclusions of a recent survey of 490 public library managers and professionals from across North America. This study, conducted by the *Library Resource Guide (LRG)*—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI)—in October and November 2010 among libraries listed in ITI's *American Library Directory*, reveals current spending patterns for public, academic, government, and special libraries and projects budget and other spending trends for 2011. A total of 1,201 libraries representing four key segments—public libraries, academic libraries, special and corporate libraries, and government (mainly state, federal and armed forces) libraries responded to the survey.

Among the 490 respondents from public libraries are directors, administrators, managers, department heads, and librarians from the complete range of library settings and sizes. Just under one-fourth serve populations of fewer than 10,000 constituents, and another 18% serve between 10,000 and 50,000 people. More than one-fourth service more than 100,000 people. (For detailed demographic breakdowns, see Figures 29-32 at the end of this report.)

Key findings from the survey include the following:

- While the past year has been difficult for many public libraries in terms of budget cuts, prospects are brighter for the year ahead. Larger public libraries suffered the most severe cuts while fewer cuts are seen among the smallest libraries, which already operate on relatively little funding. Typical annual budgets currently fall in the range of $200,000 at the extreme low end to close to $3 million, and a majority of that funding goes to staffing.
- Three out of four public libraries had to cut back in areas over the past year, and in most cases, this involved salary freezes for staff—particularly at larger libraries. More hard-hit public library segments show a greater tendency to move away from print and to digitizing their collections and offerings. Four out of 10 public libraries have also increased efforts to solicit grants and private donations.
- Public libraries report a significant surge in patron demand for digital information and technology resources. There has also been a surge in demand for job search and career information, suggesting a significant role for public libraries at a time of profound economic shifts. Demand remains just as high for print materials as digital content at this time. There is also high demand for both ebooks and audiobooks.
- Public libraries have experienced a period of painful cuts, including online subscriptions. Public libraries are also extremely cautious when it comes to cloud computing. But there was little let-up in investments in technology hardware and software. Libraries serving mid-size communities are the most aggressive buyers of technology products.
- Most public libraries serving large to mid-size populations have strategic plans, and customer service tops the list of priorities going forward. Technology also is seen as a leading initiative for the public library of the 2010s.

"Funding and relevancy" are key issues, according to the department head of a Southeastern public library. "While the need for the existence of the library institution is being challenged, the fact is that a large majority of the population still remains 5–10 years or more behind the technology in regards to training and being able to comfortably utilize the range of technology available. The need for digital transliteracy is becoming more apparent with the high unemployment and upcoming career opportunities. Libraries are [in a] position to meet that need and others."

Still, survey respondents were also keenly aware of the need to not only keep pace with technology and operate like a business, but also clearly communicate the value of libraries to their constituents. Community support and involvement is a bedrock practice that is vital as libraries enter the digital age. As expressed by the administrator of a Midwestern public library, "The biggest challenge facing libraries nationwide is to continue to grow services to meet the needs of the community through digital collections, computer access and social networking; and also advocating the role public libraries play in their communities to ensure that adequate funding is received and excellent services are provided."

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PUBLIC LIBRARIES' BUDGETS AND FUNDING

While the past year has been difficult for many public libraries in terms of budget cuts, prospects are brighter for the year ahead. Larger public libraries suffered the most severe cuts while fewer cuts are seen among the smallest libraries, which already operate on relatively little funding. Typical annual budgets currently fall in the range of $200,000 at the extreme low end to close to $3 million, and a majority of that funding goes to staffing.

In order to ensure that this survey would accurately measure current and projected budgets, screening questions were used to qualify respondents. A majority of survey respondents, 69%, reported they have some role in managing their public library's budget. More than two-fifths of respondents indicated that they have final say in budget matters. (See Figure 1.)

Overall, the 2010 fiscal year was difficult for many public libraries, with 43% reporting decreases in their budgets, versus 37% seeing increases. Only 5% reported severe cuts exceeding 10% of their previous annual budget, however.

According to responses, most budgets will be more stable in the year ahead. For fiscal year 2011, 32% of respondents anticipate budget cuts, down from 43% who saw cuts from 2009 to 2010. The portion expecting no change in their annual budgets will increase from 18% to 28%, another important sign of stabilization. The portion expecting increases, however, will be lower in the upcoming year and, in most cases, the increases will be modest, not topping 5% of the current year's budgets. (See Figure 2.)

While there has been consternation over the level of local and municipal funding, there is actually a mixed picture for public libraries compared to the academic, corporate and special libraries covered in the larger LRG survey. Public libraries showed the strongest levels of budget increases on one hand as well as the highest percentages of declines on the other.

Most of the pain within the public library sector has been concentrated within larger establishments. More than twice as many of the largest libraries (serving populations greater than 100,000 people) report cuts over the past year as their smallest counterparts (60% versus 26%). Over the coming year, most of the pain will continue to be felt within moderate-sized libraries serving populations of between 10,000 and 25,000 people. Only 18% of the smallest community libraries (serving fewer than 10,000 people) expect to see cuts in their budgets. (See Figure 3.) However, keeping things in perspective, smaller libraries have relatively modest budgets—the smallest libraries in the survey have annual operating budgets of about $190,000 a year.

Respondents provided their total annual budgets for fiscal year 2010, including all aspects of operations and services—personnel, content acquisitions, collection development, operations, library systems, computers, A/V, media equipment, software, and services. Since respondents represent or oversee differing budget levels—some may only be able to provide responses for their particular library, while others may be representing multibranch systems—budget results are presented across four structural categories:

- Single, independent libraries
- Single libraries within multibranch systems
- Main libraries for multibranch systems
- Entire multibranch systems

Those in single, independent public libraries report an average annual budget of about $745,000, while budgets range up to $3 million for those responding for entire library systems. (See Figure 4.)

Size of population served makes a significant difference in budgets. For example, single, stand-alone public libraries serving populations of fewer than 10,000 people have budgets of only $190,000 a year, on average. By contrast, single public libraries serving more than 50,000 people have average budgets of close to $2 million a year. (See Figure 4.)

Typically, personnel and staffing represent a majority of annual public library budgets—on average, 55% of respondents' current budgets are spent on human resources. About 17% of the annual budget goes to operations and facilities management, and 16% of funds go to content acquisitions and collection development. On average, about 7% of budgets are directed to information technologies, ranging from Integrated Library System (ILS) systems to media equipment. (See Figure 5.)

These investments are fairly uniform across all sizes of public libraries. However, those libraries in the upper mid-size range (serving populations between 50,000 and 100,000) were more likely to have heavier proportions of budgets invested in human resources as well as content acquisition.

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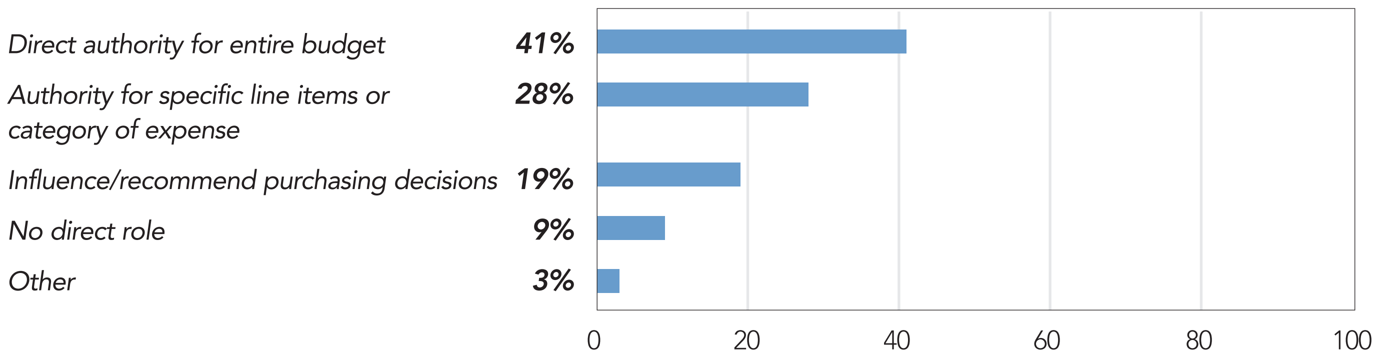
Figure 1: Respondents' Roles in Managing Library Budgets



(Total does not equal 100% due to rounding.)

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Figure 2: Changes in Public Library Budgets

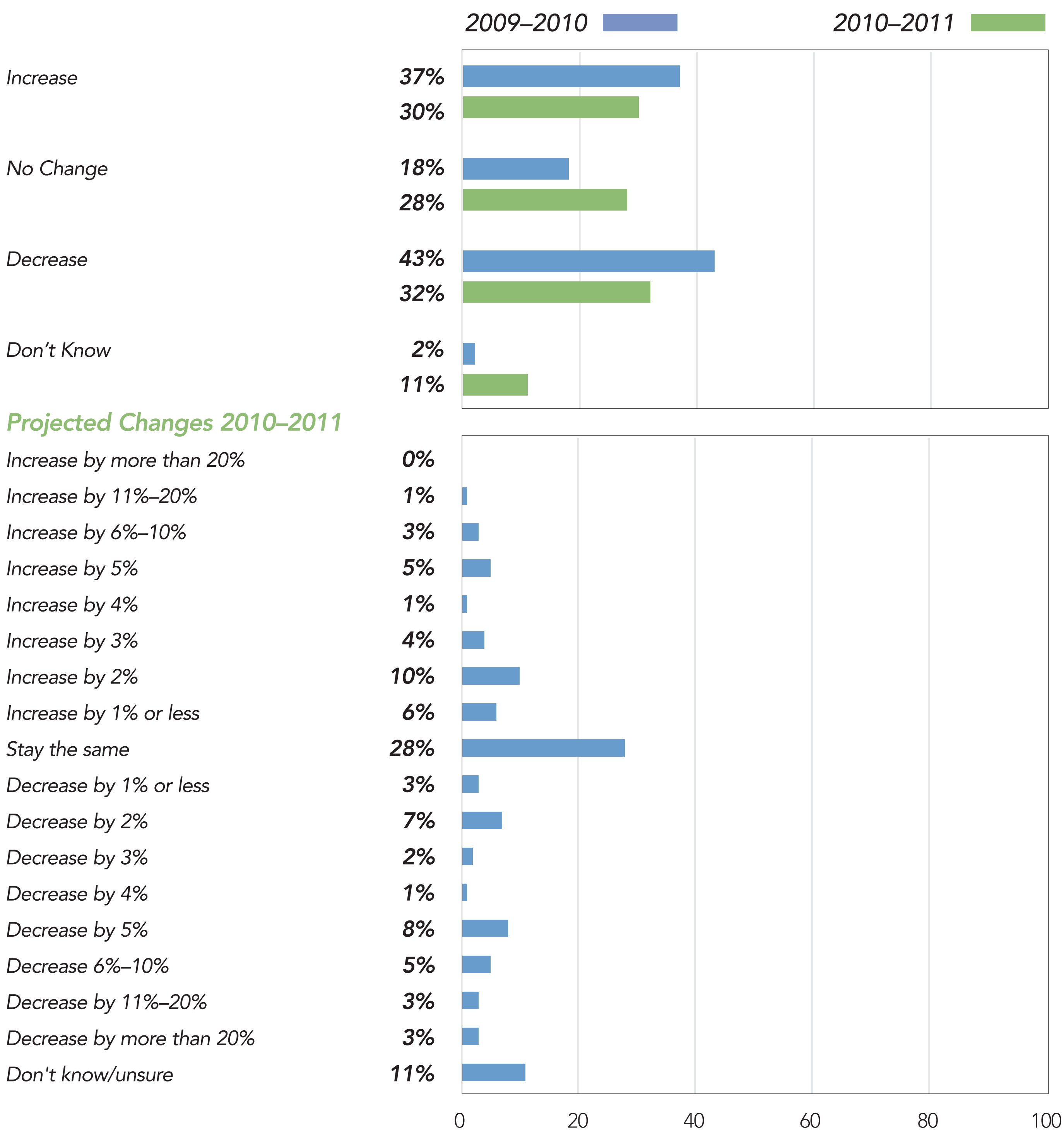

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Figure 3: Who's Cutting Back? Libraries Cutting Budgets—By Population Served

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
2009–10	***26%***	***42%***	***51%***	***48%***	***60%***	***43%***
2010–11	***18%***	***44%***	***32%***	***22%***	***40%***	***32%***

Figure 4: Public Library Budgets—By Population Size Served

SINGLE INDEPENDENT PUBLIC LIBRARIES

Fewer than 10,000	*$190,108*
10,000 to 25,000	*$477,788*
25,000 to 50,000	*$1,576,909*
More than 50,000	*$1,960,060*

AVERAGE—ALL SIZES $744,974

SINGLE LIBRARY WITH/IN MULTIBRANCH, MULTILOCATION SYSTEM

Fewer than 10,000	*$164,504*
10,000 to 25,000	*$145,000*
25,001 to 50,000	` *$900,000*
More than 50,000	*$2,894,573*

AVERAGE—ALL SIZES $1,246,320

MAIN LIBRARY FOR MULTIBRANCH, MULTILOCATION SYSTEM

Fewer than 50,000	*$1,209,625*
50,000 to 100,000	*$1,873,870*
More than 100,000	*$4,732,476*

AVERAGE—ALL SIZES $2,675,108

LIBRARY SYSTEM WITH MULTIPLE BRANCHES/FACILITIES

Fewer than 25,000	*$555,692*
25,001 to 50,000	*$1,452,700*
50 to 100,000	*$2,426,258*
More than 100,000	*$4,455,318*

AVERAGE—ALL SIZES $2,893,978

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Figure 5: Percentage of Current Annual Public Library Budget Dedicated to Key Areas (based on average reported for each category)

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Personnel/staffing	***55%***	***50%***	***59%***	***60%***	***50%***	***55%***
Operations/facilities	***19%***	***16%***	***15%***	***16%***	***14%***	***17%***
Content acquisitions/ collection development	***16%***	***14%***	***13%***	***24%***	***14%***	***16%***
Library systems, computers, A/V, media equipment, software and services	***7%***	***7%***	***8%***	***8%***	***7%***	***7%***
Other	***1%***	***6%***	***3%***	***5%***	***2%***	***1%***

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

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MANAGING IN A NEW ERA

Three out of four public libraries had to cut back in areas over the past year, and in most cases, this involved salary freezes for staff—particularly at larger libraries. More hard-hit public library segments show a greater tendency to move away from print and are turning to digitizing their collections and offerings. Four out of 10 public libraries have also increased efforts to solicit grants and private donations.

As noted in the previous section, staffing and human resources were the two biggest budget areas for public libraries, and this is where most cuts were made. Seventy-five percent of respondents indicated that at least some of their budgets were cut or frozen in areas of their operations over the past year.

When it came to containing costs, the first place public libraries looked was to put a hold on staff salaries—more than two-fifths indicated they were forced to freeze salaries at current levels. Salary freezes were most in evidence among the largest public libraries in the survey, a measure taken by 62% of the largest institutions. The largest public libraries were more than twice as likely as the smallest public libraries in the survey to have undertaken salary freezes. The same number of large public libraries also report cutting back on travel and training budgets.

Interestingly, few of the smallest libraries cut staff to meet budgeting challenges. In addition, efforts to digitize library collections and services—which will be discussed in more detail in the next section—were not seen among the smallest public libraries at all. (See Figure 6.)

Library managers responding to the survey reported a number of additional strategies for coping with budget shortfalls. "We initiated job sharing to replace full-time staff, meaning less benefits," reported one respondent, the director of an independent public library in the Midwest. The administrator of a medium-sized public library in the Northeast reported "using money from our reserve to meet the shortfall so we don't have to make cuts to hours or staff."

Still, while many public libraries have had to do their share of cutting since the economic downturn hit in 2008, there are a number of libraries reporting increased spending in some areas. One out of four public libraries, for example, actually increased their staffing levels, and a number also increased spending for digital and electronic materials. Increases in human resources were most pronounced among smaller institutions, with 28% of libraries serving fewer than 10,000 people reporting increases during this period.

"Our biggest challenge is maintaining the expertise of the experienced library worker while satisfying the needs of an ever-increasing digital culture," says the manager of a large public library. "To meet the challenge, we need to create a working environment that encourages continual learning and training, embraces change and values a vision of the future that can include the individuals from the past. This requires administrative leadership that promotes individuals who are motivated and passionate and is willing to endure the loss of those who aren't."

Acquisitions of ebooks and technology equipment was most in evidence among mid-size libraries through the past year. Close to one-third of the libraries in the 25,000-50,000 population category had ramped up ebook investments, while 22% of somewhat larger institutions increased their spending on technology equipment. (See Figure 7.)

Where do most funds come from? Not surprisingly, more than nine out of 10 public libraries see most of their funding coming from local government sources. Close to half also see some money coming in from their state governments. Among the smallest libraries (serving populations of less than 10,000), there is somewhat less of a tendency to rely on local government funding and a far greater inclination to rely on grants, gifts and fundraising for annual support. At least 44% of public libraries of all sizes say they receive some funding via gifts and donations. (See Figure 8.)

Forty-one percent of respondents from public libraries say they also received grants that are part of their income streams for the past year. In a majority of cases, these were either government grants or grants from private foundations. Foundations were slightly more generous with smaller public libraries, while corporations were more likely to give to the larger library systems. (See Figure 9.)

As the economy soured in 2008 and 2009, many libraries ramped up their appeals for gifts, donations, and grants to support programs. At least four out of 10 report they turned to these additional sources as a result of the economic downturn. Smaller mid-size libraries (serving 10,000-25,000 people) have

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been the most aggressive on seeking gifts and donations. Close to one-third of the smallest libraries have also increased their hosting of special fundraising events. (See Figure 10.)

But still, as one survey participant, the director of a Northeastern public library, says, the key is to build support at the local level. "Funding will continue to be the biggest challenge as I think it's going to take a long period of time for state and local budgets to recover from the recession. We can meet the challenge by creating experiences at libraries and continuing to grow our patron base by spending our money wisely on the services and materials that our users want and ones that will get them coming in the doors."

One solution available to libraries is pooling their efforts in various consortia or networks. Materials are shared and costs mitigated across networks, which are often nonprofit membership associations. The survey finds that one out of five public libraries has increased their participation in consortia during recent economic times. (See Figure 11.)

Close to three-fourths of respondents to the survey report their libraries are part of one or more consortia or networks. (See Figure 12.) Leading consortia mentioned by respondents include OCLC, Lyrasis, Amigos Library Services, TexShare, Waldo, MCLS, MLS, Minitex, Mobius, Galileo, SELC, and Infolink.

Respondents have had mixed levels of support from the consortia of which they are a part. About one out of four respondents stated that their support from consortia has increased, but another 16% reported decreased support. (See Figure 13.)

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Figure 6: Actions to Manage or Respond to Budget Cuts/Freezes

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Salary freezes	***28%***	***40%***	***46%***	***46%***	***62%***	***43%***
Cut or eliminated conference/travel/education budget	***18%***	***46%***	***46%***	***46%***	***62%***	***40%***
Cut spending on subscriptions	***22%***	***42%***	***34%***	***57%***	***56%***	***39%***
Applied for more grants	***30%***	***42%***	***31%***	***50%***	***44%***	***38%***
Reduced programming	***12%***	***38%***	***23%***	***29%***	***50%***	***29%***
Added volunteers	***24%***	***32%***	***26%***	***29%***	***31%***	***28%***
Staff layoffs/staff hours cut	***8%***	***38%***	***29%***	***21%***	***40%***	***25%***
Reduced library hours	***11%***	***18%***	***31%***	***11%***	***48%***	***23%***
Lobbied for more funding from institutions	***11%***	***18%***	***9%***	***25%***	***27%***	***17%***
Renegotiated contracts with vendors	***0%***	***18%***	***20%***	***32%***	***37%***	***18%***
Reduced IT expenditures	***7%***	***20%***	***9%***	***25%***	***35%***	***18%***
Moved more services/ materials online	***4%***	***14%***	***20%***	***18%***	***25%***	***14%***
Collaborated/shared with other libraries/joined consortia	***7%***	***20%***	***14%***	***11%***	***10%***	***12%***
Consolidation of departments	***1%***	***10%***	***6%***	***14%***	***31%***	***11%***
Closed facilities	***1%***	***0%***	***0%***	***0%***	***2%***	***1%***
We have had no cuts or budget freezes over the past year	***38%***	***18%***	***29%***	***7%***	***8%***	***23%***
Don't know/unsure	***5%***	***0%***	***0%***	***0%***	***0%***	***2%***
Other	***11%***	***12%***	***6%***	***0%***	***10%***	***9%***

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Figure 7: Areas Seeing Increased Spending or Support Over the Past Year

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Personnel	*28%*	*21%*	*32%*	*19%*	*21%*	*25%*
Ebooks	*10%*	*19%*	*29%*	*19%*	*21%*	*18%*
Library technology equipment, software	*15%*	*15%*	*9%*	*22%*	*19%*	*16%*
Book acquisitions	*13%*	*9%*	*21%*	*7%*	*9%*	*12%*
Facilities upgrades/ maintenance	*11%*	*13%*	*12%*	*15%*	*21%*	*14%*
Operations	*13%*	*6%*	*18%*	*7%*	*9%*	*11%*
Online subscription acquisitions	*6%*	*6%*	*18%*	*11%*	*14%*	*10%*
Digital content collections/services	*1%*	*4%*	*6%*	*19%*	*23%*	*9%*
Library hours/availability	*13%*	*6%*	*6%*	*4%*	*5%*	*8%*
IT services	*6%*	*2%*	*3%*	*15%*	*16%*	*8%*
Periodicals/serials acquisitions	*4%*	*4%*	*3%*	*4%*	*2%*	*4%*
Multimedia/streaming media	*1%*	*2%*	*0%*	*4%*	*7%*	*3%*
Cloud-based solutions	*0%*	*0%*	*3%*	*0%*	*5%*	*1%*
We have had no spending increases over the past year	*27%*	*34%*	*35%*	*41%*	*40%*	*34%*
Don't know/unsure	*8%*	*4%*	*3%*	*0%*	*7%*	*5%*
Other	*11%*	*6%*	*0%*	*11%*	*5%*	*7%*

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Figure 8: Primary Public Library Funding Sources

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Public funding—local	***85%***	***98%***	***94%***	***93%***	***96%***	***92%***
Public funding—state	***49%***	***56%***	***37%***	***25%***	***48%***	***46%***
Gifts and donations	***55%***	***58%***	***31%***	***46%***	***19%***	***44%***
Grants	***53%***	***44%***	***23%***	***43%***	***33%***	***41%***
Special fundraising events	***33%***	***13%***	***9%***	***7%***	***4%***	***16%***
Endowments	***9%***	***13%***	***14%***	***14%***	***6%***	***11%***
Public funding—federal	***12%***	***10%***	***0%***	***14%***	***12%***	***10%***
Fee-based services	***7%***	***15%***	***9%***	***11%***	***6%***	***9%***
Corporate funding	***0%***	***0%***	***3%***	***4%***	***0%***	***1%***
University/school funding	***1%***	***2%***	***0%***	***0%***	***0%***	***1%***
Don't know/unsure	***1%***	***2%***	***0%***	***0%***	***0%***	***1%***
Other	***9%***	***10%***	***11%***	***4%***	***2%***	***8%***

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Figure 9: Grants Received by Public Libraries

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Grants from foundations	***70%***	***70%***	***62%***	***62%***	***62%***	***67%***
Government grants	***55%***	***52%***	***37%***	***77%***	***87%***	***61%***
Grants from corporations	***12%***	***13%***	***25%***	***38%***	***44%***	***22%***
Grants from private individuals	***7%***	***17%***	***12%***	***23%***	***6%***	***12%***
Other	***12%***	***4%***	***12%***	***0%***	***0%***	***5%***

Funding and Priorities: The Library Resource Guide Benchmark Study on 2011 Library Spending Plans was produced by Unisphere Research and sponsored by ProQuest. Unisphere Research is the market research unit of Unisphere Media, a division of Information Today, Inc., publishers of *Database Trends and Applications* magazine and the *5 Minute Briefing* newsletters. Unisphere Media, 229 Main Street, Chatham, NJ 07928. Tel: 973-665-1120, Fax: 973-665-1124, Email: Tom@dbta.com, Web: www.dbta.com.

Data collection and analysis performed with SurveyMethods.

Figure 10: Library Funding Sources Identified or Increased During Recent Economic Downturn

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Grants	*27%*	*41%*	*38%*	*35%*	*41%*	*41%*
Gifts and donations	*27%*	*51%*	*38%*	*38%*	*41%*	*38%*
Public funding—local	*24%*	*36%*	*12%*	*12%*	*15%*	*22%*
Special fundraising events	*31%*	*21%*	*15%*	*8%*	*10%*	*20%*
Fee-based services	*3%*	*17%*	*8%*	*8%*	*7%*	*8%*
Public funding—state	*10%*	*13%*	*4%*	*4%*	*5%*	*8%*
Endowments	*4%*	*11%*	*0%*	*4%*	*10%*	*6%*
Corporate funding	*3%*	*2%*	*8%*	*12%*	*5%*	*5%*
Public funding—federal	*4%*	*9%*	*0%*	*4%*	*2%*	*4%*
Don't know/unsure	*20%*	*13%*	*19%*	*12%*	*22%*	*18%*
Other	*15%*	*13%*	*15%*	*27%*	*20%*	*17%*

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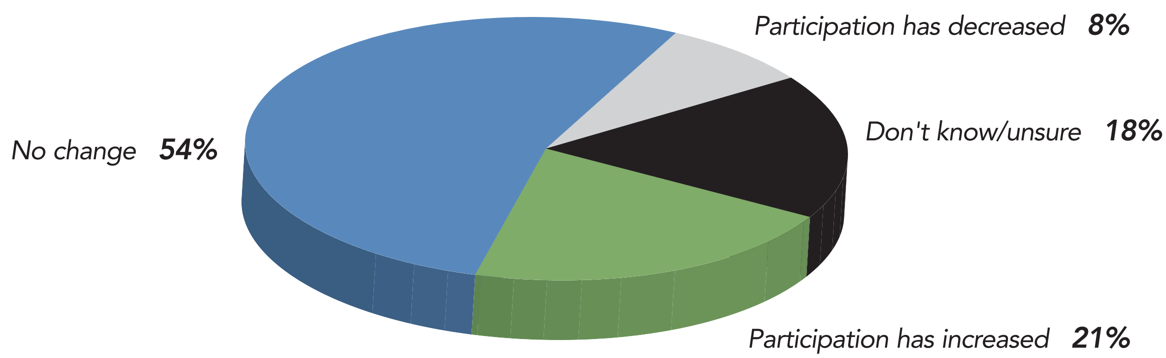
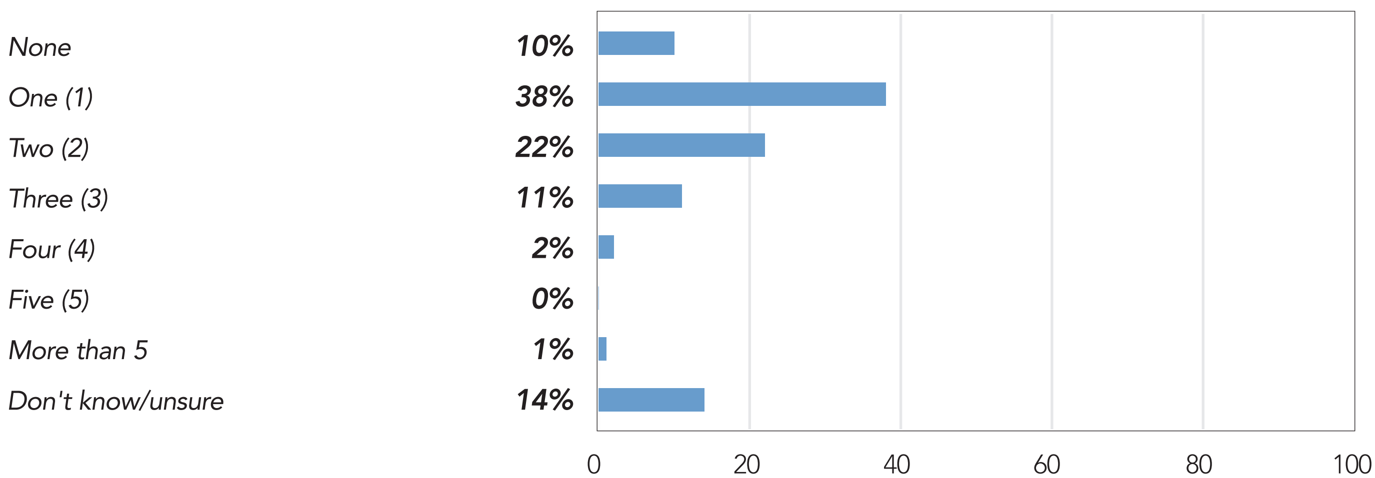
Data collection and analysis performed with SurveyMethods.

Figure 11: Changes in Participation in Consortia/Networks by Public Libraries During Recent Economic Downturn



(Total does not equal 100% due to rounding.)

Figure 12: Number of Consortia or Network Memberships by Public Libraries



(Total does not equal 100% due to rounding.)

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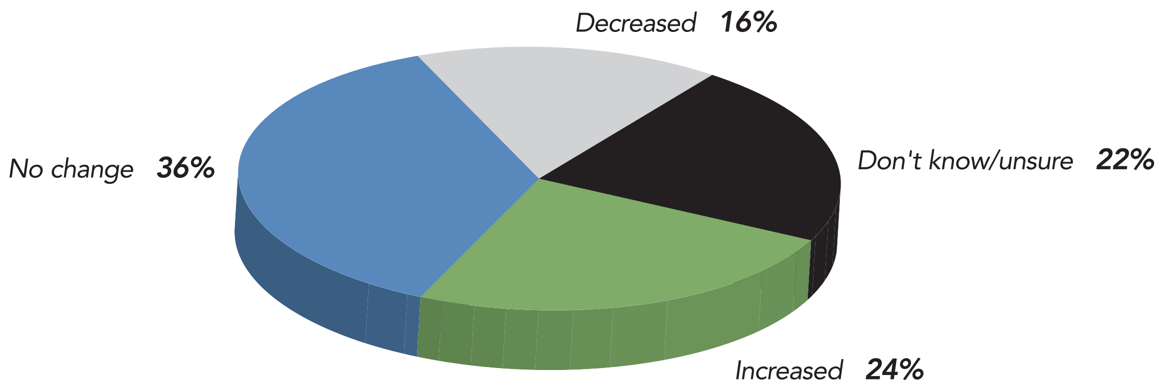
Data collection and analysis performed with SurveyMethods.

Figure 13: Change in Support From Consortia/Networks Over Past Year



(Total does not equal 100% due to rounding.)

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DIGITAL AND ELECTRONIC RESOURCES

Public libraries report a significant surge in patron demand for digital information and technology resources. There has also been a surge in demand for job search and career information, suggesting a significant role for public libraries at a time of profound economic shifts. Demand remains just as high for print materials as digital content at this time. There is also high demand for both ebooks and audiobooks.

Patrons have turned to public libraries in a big way for technology-based resources over the past year. More than eight out of 10 respondents indicate that they have seen a surge in patrons seeking wireless internet access, which may be in part a reflection of the struggling economy and in part due to the increased proliferation and ubiquity of mobile and personal computing. In a related trend, 77% report that more patrons over the past year have been seeking basic computer and web access.

In addition, there has been strong demand from public libraries for job search and career development information, cited by 76% overall. This demand has been especially acute among institutions serving populations in the 50,000 to 100,000 range. This provides some evidence that public libraries have assumed roles as support centers for individuals going through economic hardships or a restructuring of their careers. As evidenced by Monster.com statistics on employer listings released in February 2011, demand for skilled employees is back up to pre-recession levels. However, unemployment and under-employment remains stubbornly high, suggesting that there is a wide gap between the skills employers seek to compete in a global economy, and the skills of many available workers. Public libraries are serving as the resource to bridge this gap. (See Figure 14.)

"The biggest challenge for libraries is/will be coping with increased demand for services from a public that is turning to libraries for assistance that they can no longer provide for themselves such as Internet connections, best sellers, school readiness, literacy, and e-government access to services," says one public library manager.

Demand for digital resources is also particularly strong among mid-size community libraries. For example, two out of three of libraries in the 50,000-to-100,000 population category report increased demand for both ebooks and audiobooks.

"Libraries could save a lot of money by circulating devices that download books," says the administrator of a mid-size public library in the Northeast. "The ebooks that would be available for or on these devices would need to be user-friendly for patrons."

Interestingly, while there is an increasing emphasis on digital content, respondents from public libraries report no difference between the growth in demand for electronic-based offerings and that for print-based offerings. Demand is equally high for both categories—more than two out three respondents say there was an increase over the past year. (See Figure 15.)

While there is substantial growth in ebook and digital content, a sizable segment of public library budgets remains devoted to traditional print resources. Respondents indicated that on the average, a combined total of 70% of their content acquisition budget went to printed books, other printed materials, and print-based serials and periodicals. Smaller libraries are more likely to be continuing to devote a larger share of their budgets to printed materials. Another 24% of content acquisition budgets are dedicated to digitized content, including online databases, digital content collections, electronic-based media titles, and ebooks. While public libraries keep ramping up their digital content, traditional print still dominates a major portion of annual library budgets. (See Figure 16.)

"We need to provide streaming content in order to compete with users with Kindles, iPads, etc.," says the department head of a Northeastern public library. "At the same time, we need to ensure that the library remains a 'destination' for books, programs and access to technology. Oh, and we need funding."

"The single biggest challenge facing libraries in the next 5 years is the transition from print to electronic media," says one manager. "Libraries have traditionally been focused on loaning hard media, and face significant challenges such as competitive streaming/downloading media providers and for-profit business models, when migrating that service to a virtual environment."

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Figure 14: Where Patron Requests Have Increased Over the Past Year

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Wireless access	89%	89%	86%	67%	82%	84%
Computer/web access	82%	84%	75%	73%	68%	77%
Job search/career development information	59%	75%	82%	91%	86%	76%
Audiobooks	57%	75%	64%	67%	61%	64%
Ebooks	30%	38%	50%	61%	52%	43%
Technical information/ training	29%	51%	43%	33%	50%	41%
Computer games/ simulations	29%	25%	30%	27%	20%	26%
English language instruction	6%	13%	32%	45%	36%	22%
Primary and continuing education programs/requirements	15%	23%	25%	21%	27%	21%
Medical	9%	11%	11%	12%	16%	12%
Streaming media	6%	10%	11%	21%	14%	11%
Don't know/unsure	5%	2%	0%	3%	4%	3%
Other	5%	2%	2%	3%	2%	3%

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Data collection and analysis performed with SurveyMethods.

Figure 15: Change in Demand for Library Print and Electronic Offerings and Services Over the Past Year

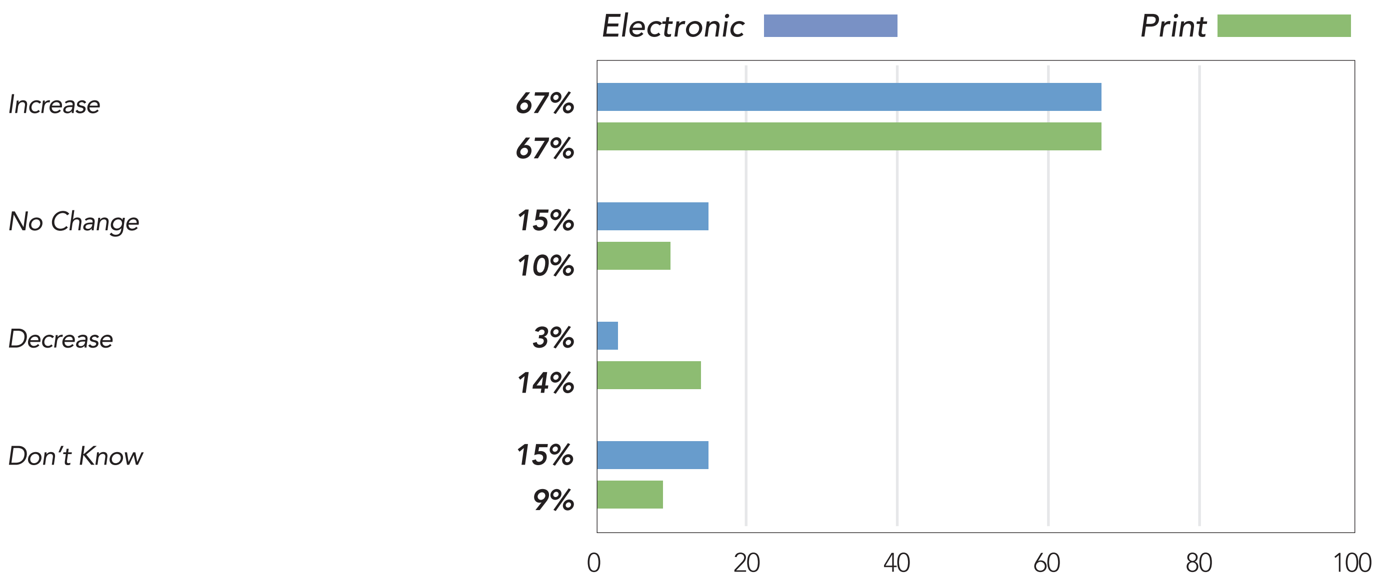

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Figure 16: Content Acquisitions Portion of Respondents' Budgets (based on average reported for each category)

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Printed books and other printed materials	***62%***	***63%***	***60%***	***58%***	***56%***	***61%***
Media titles (video, audio, computer-based modules, games, etc.)	***15%***	***16%***	***17%***	***14%***	***16%***	***16%***
Serials/Periodicals (print)	***9%***	***8%***	***8%***	***9%***	***5%***	***9%***
Online databases, digital content collections	***3%***	***5%***	***10%***	***8%***	***10%***	***7%***
Special programs	***4%***	***2%***	***1%***	***1%***	***3%***	***2%***
Ebooks	***1%***	***2%***	***2%***	***1%***	***0%***	***1%***
Other (microforms, manuscripts, archives, preservation, etc.)	***0%***	***1%***	***1%***	***2%***	***2%***	***1%***
All other categories	***2%***	***4%***	***1%***	***5%***	***4%***	***3%***

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TECHNOLOGY EQUIPMENT AND SERVICES

Public libraries have experienced a period of painful cuts, including online subscriptions. Public libraries are also extremely cautious when it comes to cloud computing. But there was little let-up in investments in technology hardware and software. Libraries serving mid-size communities are the most aggressive buyers of technology products.

For the most part, library spending on information technology hardware, software, and related IT services (not including online subscriptions) has held steady over the past year. About one-third say spending increased, and another third say it remained unchanged. Only 12% reported a decrease. Interestingly, those libraries in mid-size communities (25,000–50,000) reported the greatest increases in IT spending, while spending at both extremes (very small and very large) was more tepid. In fact, larger libraries were more likely to have seen spending cuts in these areas during the 2009-2010 period. (See Figure 17.)

The level of increases in IT spending will remain the same through the coming year. Again, those respondents representing mid-sized public libraries expect the greatest gains, while larger libraries continue to see cuts in IT spending over the coming year. (See Figure 18.)

Many public libraries were faced with hard choices as to how to pare down their annual budgets, and online subscriptions fell to many budget axes, the survey finds. Over the past year, only 18% increased spending in this area, compared to 21% cutting back. The trend toward cutting back on these services was most pronounced among mid-size libraries. (See Figure 19.)

There will be slight bottoming out in the trend of cutting online subscriptions, with only 13% planning to decrease spending in this area over the coming year, compared to 21% last year. However, plans to increase spending are not robust, either—only 16% plan outright spending increases. As has been the case, mid-size libraries are taking the lead in this area. (See Figure 20.)

Public libraries are very slow and cautious when it comes to adopting cloud computing, the survey finds. Currently, only a handful use cloud, and overall, about 16% of public library respondents indicate they use or plan to use cloud-computing-based resources. Adoption or planned adoption is most prevalent among the largest libraries in the survey. (See Figure 21.)

Current or planned uses of cloud computing in public library settings mainly include communications capabilities, such as web conferencing, video, podcasting, email, and collaboration. However, for the most part, respondents are uncertain as to what kinds of cloud services they will be using. Three out of four, in fact, say they do not know what role the cloud will play. (See Figure 22.)

In terms of existing technology products or services, online library catalog/OPACs are a standard for almost all public libraries, present at 93% of sites. Close to nine out of 10 also maintain a LAN, WAN, or wireless network for online access, and 77% also have an integrated library system (ILS). ILS adoption is weaker among the smallest public libraries in the survey. Two-thirds of public libraries also offer hardware to their patrons—PCs, laptops, information kiosks, or mobile devices. A similar number also have a website or an intranet type of network provided. (See Figure 23.)

Along with existing investments, library managers were asked to identify areas in which they intended to make new purchases or upgrades. Computer hardware is highest on the list of planned purchases over the coming year. More than one-third of public libraries plan to purchase or upgrade their PCs or other computers during 2011. Another 31% plan to purchase ebook readers, while 20% will be upgrading their online catalogs and integrated library systems. (See Figure 24.)

Web 2.0—which encompasses the use of online social media, as well as communication and collaboration tools such as blogs or wikis—is another area public library managers are exploring. More than two-thirds, in fact, are either encouraging or planning to encourage the use of social networking tools such as Facebook and LinkedIn. Another 38% are promoting the use of wikis or blogs. Just over one-third are employing online tools to encourage patron reviews or ratings of materials within their facilities. There is also some movement for public libraries to support video creation and sharing. (See Figure 25.)

"Overcoming the belief that libraries aren't necessary anymore, that everything can be found online" is a challenge cited by the director of a large Western public library. "We need to inform and educate like never before to let the public know that we're not your grandmother's library anymore."

Naturally, however, simply putting technology services in place isn't enough—training is also required. "I work for a network of 66 small public libraries—we offer good electronic services and we are planning to offer more ebooks soon, but nobody in all the library's staff has time to learn to know and explain these new resources to the public," says the vice president for a Canadian public library.

"The single biggest challenge is adapting to the ever-increasing speed of new technology coming on the market," says another respondent, a manager of a mid-size Southern library. "It is very difficult to be relevant and current when technology is outdated before you even have the funds to buy it. It is hard to know of a solution other than working on more grants, joining consortia to get a better price, and possibly fund raising so that the people in the community can have a hand and even a say in what we can do to stay ahead of the game."

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Data collection and analysis performed with SurveyMethods.

Figure 17: Change in Public Library Spending on Information Technology Hardware, Software, and Related IT Services Between 2009–2010 (not including online subscriptions)

	<10K	10–25K	25–50K	50-100K	100K+	AVG.
Increased	***28%***	***35%***	***45%***	***30%***	***29%***	***33%***
Stayed the same	***42%***	***40%***	***24%***	***30%***	***22%***	***33%***
Decreased	***7%***	***8%***	***11%***	***21%***	***19%***	***12%***
Don't know/unsure	***23%***	***17%***	***19%***	***18%***	***30%***	***22%***

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

Figure 18: Change in Public Library Spending on Information Technology Hardware, Software, and Related IT Services Over Coming Year (2010–2011) (not including online subscriptions)

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Increased	***35%***	***28%***	***43%***	***24%***	***29%***	***31%***
Stayed the same	***42%***	***40%***	***33%***	***39%***	***30%***	***37%***
Decreased	***7%***	***11%***	***7%***	***15%***	***17%***	***10%***
Don't know/unsure	***17%***	***22%***	***17%***	***21%***	***26%***	***21%***

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

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Data collection and analysis performed with SurveyMethods.

Figure 19: Change in Public Library Spending on Online Subscriptions Between 2009–2010

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Increased	***12%***	***15%***	***31%***	***9%***	***23%***	***18%***
Stayed the same	***67%***	***54%***	***26%***	***31%***	***20%***	***43%***
Decreased	***11%***	***14%***	***24%***	***43%***	***31%***	***21%***
Don't know/unsure	***10%***	***18%***	***19%***	***16%***	***28%***	***18%***

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

Figure 20: Change in Public Library Spending on Online Subscriptions Over Coming Year (2010–2011)

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Increased	***9%***	***23%***	***21%***	***12%***	***17%***	***16%***
Stayed the same	***70%***	***50%***	***50%***	***47%***	***37%***	***52%***
Decreased	***5%***	***11%***	***12%***	***25%***	***19%***	***13%***
Don't know/unsure	***16%***	***17%***	***17%***	***16%***	***28%***	***19%***

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

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Figure 21: Percentage of Libraries Adopting Cloud Computing

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Currently use cloud resources	***2%***	***2%***	***5%***	***3%***	***9%***	***4%***
Planning or considering cloud resources	***5%***	***16%***	***10%***	***6%***	***22%***	***12%***
No	***46%***	***36%***	***38%***	***44%***	***30%***	***39%***
Don't know/unsure	***46%***	***46%***	***48%***	***47%***	***39%***	***45%***

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

Figure 22: Cloud Computing Services

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Communications (web conferencing, video, podcasting, email, collaboration)	***7%***	***18%***	***16%***	***17%***	***21%***	***15%***
IT infrastructure (online storage, processing)	***2%***	***18%***	***8%***	***6%***	***21%***	***12%***
Specialized business applications (business, management, marketing, market research)	***5%***	***9%***	***4%***	***11%***	***13%***	***8%***
Don't know/not sure	***90%***	***74%***	***76%***	***78%***	***63%***	***76%***
Other	***2%***	***0%***	***4%***	***0%***	***5%***	***3%***

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Figure 23: Information Technology Products/Services in Use

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Online library catalog/ OPAC	*87%*	*95%*	*100%*	*97%*	*93%*	*93%*
LAN/WAN/wireless network	*77%*	*88%*	*95%*	*90%*	*93%*	*87%*
Integrated Library System (ILS)	*60%*	*78%*	*90%*	*81%*	*91%*	*77%*
PCs/kiosks/laptops/ mobile devices	*58%*	*66%*	*69%*	*71%*	*78%*	*67%*
Intranet/extranet/ website	*44%*	*64%*	*64%*	*81%*	*81%*	*64%*
Web-based (IM or email) reference service	*26%*	*40%*	*52%*	*52%*	*67%*	*45%*
RFID check-in/check-out, inventory control	*14%*	*12%*	*14%*	*32%*	*37%*	*20%*
Ebook readers	*13%*	*19%*	*21%*	*19%*	*17%*	*17%*
Audio/video teleconferencing	*12%*	*16%*	*17%*	*19%*	*22%*	*16%*
Authentication solutions	*5%*	*7%*	*17%*	*13%*	*31%*	*14%*
Electronic Resource Management Systems	*4%*	*10%*	*10%*	*10%*	*20%*	*10%*
Link resolvers	*1%*	*2%*	*2%*	*3%*	*11%*	*4%*
Discovery services	*3%*	*2%*	*5%*	*3%*	*9%*	*4%*
Other	*0%*	*3%*	*0%*	*3%*	*4%*	*2%*

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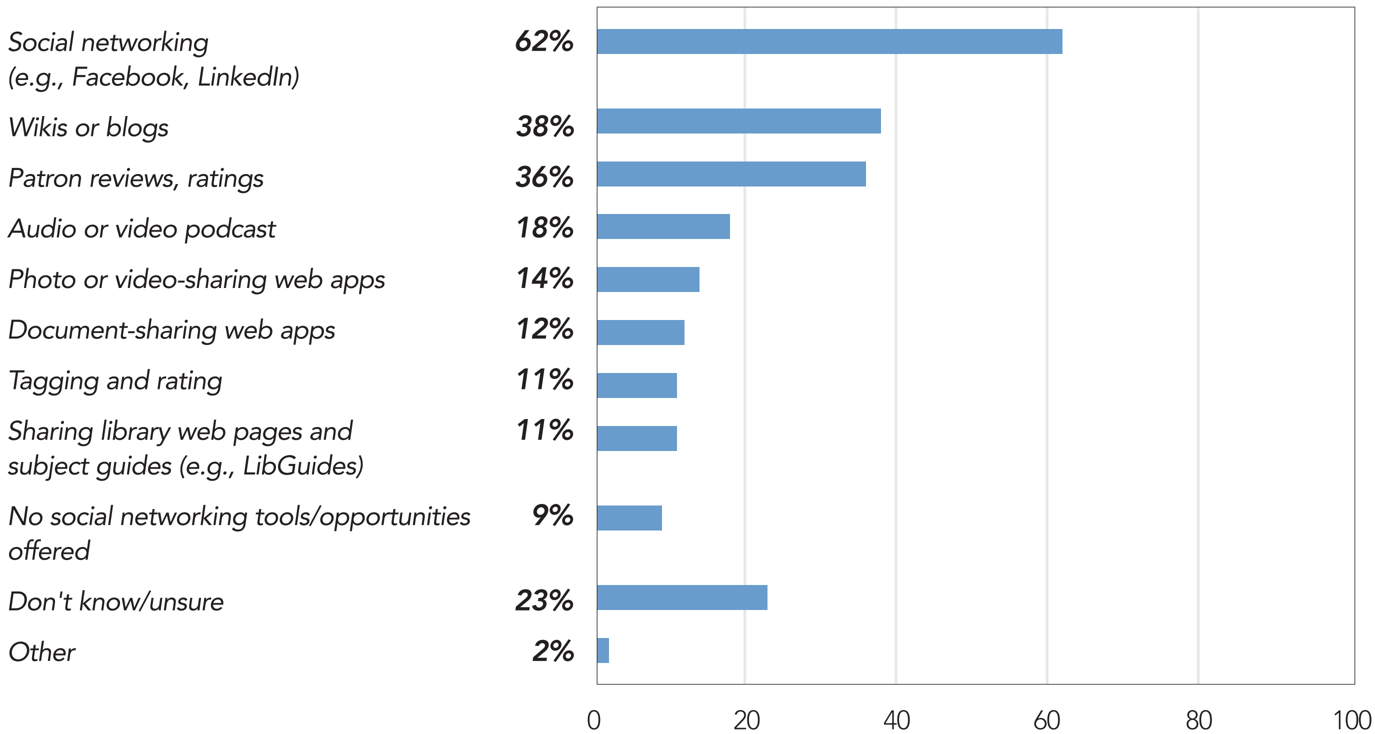
Figure 24: Information Technology Products/Services Planned for Upgrade in Fiscal 2011

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
PCs/kiosks/laptops/ mobile devices	*32%*	*33%*	*43%*	*43%*	*30%*	*35%*
Ebook Readers	*28%*	*38%*	*23%*	*43%*	*27%*	*31%*
Online library catalog/ OPAC	*21%*	*24%*	*23%*	*14%*	*16%*	*20%*
Integrated Library System (ILS)	*12%*	*18%*	*27%*	*19%*	*19%*	*18%*
LAN/WAN/wireless network	*16%*	*13%*	*23%*	*10%*	*16%*	*16%*
Intranet/extranet/ website	*7%*	*20%*	*10%*	*24%*	*22%*	*15%*
RFID check-in/check-out, inventory control	*7%*	*16%*	*10%*	*10%*	*24%*	*13%*
Audio/video teleconferencing	*9%*	*11%*	*17%*	*5%*	*8%*	*10%*
Web-based (IM or email) reference service	*4%*	*11%*	*13%*	*5%*	*5%*	*7%*
Authentication solutions	*2%*	*4%*	*0%*	*10%*	*11%*	*5%*
Electronic Resource Management Systems	*0%*	*9%*	*7%*	*0%*	*8%*	*5%*
Discovery services	*0%*	*2%*	*7%*	*5%*	*5%*	*3%*
Link resolvers	*0%*	*0%*	*0%*	*0%*	*3%*	*1%*
Other	*25%*	*16%*	*20%*	*10%*	*14%*	*18%*

Funding and Priorities: The Library Resource Guide Benchmark Study on 2011 Library Spending Plans was produced by Unisphere Research and sponsored by ProQuest. Unisphere Research is the market research unit of Unisphere Media, a division of Information Today, Inc., publishers of *Database Trends and Applications* magazine and the *5 Minute Briefing* newsletters. Unisphere Media, 229 Main Street, Chatham, NJ 07928. Tel: 973-665-1120, Fax: 973-665-1124, Email: Tom@dbta.com, Web: www.dbta.com.

Data collection and analysis performed with SurveyMethods.

Figure 25: Web 2.0 Services Being Adopted Among Public Libraries



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FUTURE PRIORITIES

Most public libraries serving large to mid-size populations have strategic plans, and customer service tops the list of priorities going forward. Technology also is seen as a leading initiative for the public library of the 2010s.

In terms of future priorities, efforts to improve or expand services to patrons are cited as high on the list by a majority of respondents at public libraries, as well as stepped-up efforts to provide assistance or education on information access tools and services. Close to one-third also seek to increase the availability of their online and digital resources offerings. (See Figure 26.)

Two items dominate the agendas of most public library managers over the next 5 years: maintaining services with tight budgets (87%), and keeping up with changes in information technology (66%). (See Figure 27.) A majority, 54%, are also focusing on identifying new sources of funding. As shown in the previous section, many public libraries turned to grants and donations to meet budget needs and expand programs. In balancing these two demands, many remain optimistic and see a way forward. "Our library system will thrive, even in these times of shrinking resources, if we focus on supporting and enhancing our core services, those services our communities need and demand," comments the director of a large Midwestern public library. "We need to continuously train [personnel] and upgrade technologies as we identify changes in service delivery .... But, the decisions for any change will always also hinge on cost savings and improved efficiencies in operations."

A majority of public libraries, 68%, now either have formal strategic plans that establish a road map going forward into this new era or are currently developing one. Another 15% are considering such plans. Larger and mid-size libraries are more likely to have adopted strategic plans than their counterparts in small communities. (See Figure 28.)

Strategic plans provide the vision going forward for many institutions. Consider this part of the mission statement from Seattle Public Library: "We strive to inform, enrich and empower every person in our community by creating and promoting easy access to a vast array of ideas and information and by supporting an informed citizenry, lifelong learning and love of reading. We acquire, organize and provide books and other relevant materials; ensure access to information sources throughout the nation and around the world; serve our public with expert and caring assistance; and reach out to all members of our community."

"Maintaining personal interactions with the public to encourage library use while libraries become increasingly impersonal and digital will be the biggest challenge," says a specialist with a California-based public library. "Our libraries must plan to focus on being community centers as well as community information centers or we will become obsolete. This will be a huge challenge as budgets decrease and a larger portion of our budgets will need to be spent on new digital applications."

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Figure 26: Priorities for the Coming Year

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Improve/expand customer service	58%	57%	64%	67%	57%	59%
Identify and reach out to new groups of patrons	51%	36%	36%	45%	41%	43%
Provide assistance and education on information access tools and services	38%	39%	36%	45%	45%	40%
Driving usage of current resources	26%	39%	38%	45%	41%	36%
Enhancing discovery of collections	25%	33%	43%	39%	39%	34%
Increase availability of online publications/digital access	23%	30%	29%	33%	37%	30%
Repurpose physical space	30%	36%	31%	18%	30%	30%
Institute special programs for constituents/patrons	33%	26%	24%	24%	23%	27%
Physical expansion/ upgrade of facilities	22%	15%	19%	24%	32%	22%
Enhancing user workflow tools	4%	11%	26%	24%	32%	17%
Join or increase participation in consortium/network	20%	18%	5%	6%	12%	14%
Develop unique library collections	11%	10%	12%	18%	7%	11%
Don't know/unsure	5%	8%	5%	0%	2%	4%
Other	2%	7%	5%	0%	7%	4%

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Data collection and analysis performed with SurveyMethods.

Figure 27: Greatest Challenges Over the Next 5 Years

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Maintaining services with tight budgets	*80%*	*95%*	*88%*	*91%*	*85%*	*87%*
Keeping up with changes in information technology	*75%*	*61%*	*72%*	*61%*	*60%*	*66%*
Identifying new sources of funding	*52%*	*61%*	*56%*	*55%*	*47%*	*54%*
Keeping facilities open or at preferred operational levels	*38%*	*64%*	*40%*	*42%*	*56%*	*49%*
Finding and retaining knowledgeable staff	*37%*	*31%*	*49%*	*21%*	*54%*	*39%*
Competing/keeping up with public online services or offerings	*35%*	*33%*	*37%*	*39%*	*27%*	*34%*
Migrating print content to digital formats	*16%*	*21%*	*23%*	*18%*	*13%*	*18%*
Other	*6%*	*3%*	*0%*	*6%*	*4%*	*4%*

Figure 28: Library Strategic Plans

	<10K	10–25K	25–50K	50–100K	100K+	AVG.
Yes	*38%*	*38%*	*58%*	*45%*	*59%*	*46%*
Under development	*26%*	*18%*	*21%*	*27%*	*21%*	*22%*
Under consideration	*16%*	*28%*	*12%*	*15%*	*4%*	*15%*
No	*14%*	*8%*	*7%*	*6%*	*11%*	*10%*
Don't know/unsure	*6%*	*8%*	*2%*	*6%*	*5%*	*6%*

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

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DEMOGRAPHICS

Figure 29: Respondents' Roles in Managing Library Budgets

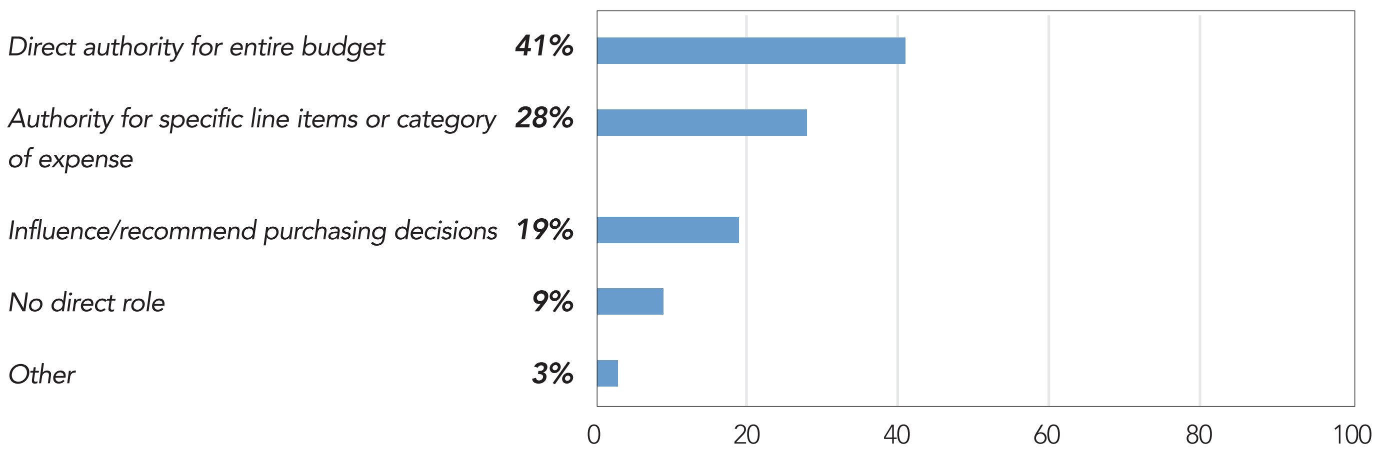

Figure 30: Total Population of Community Served

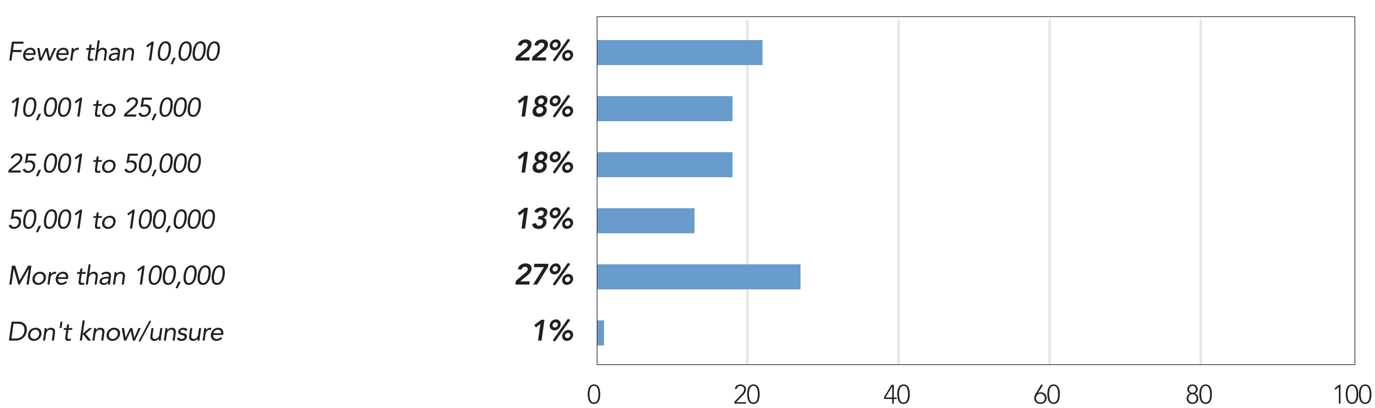

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Figure 31: Respondents' Titles

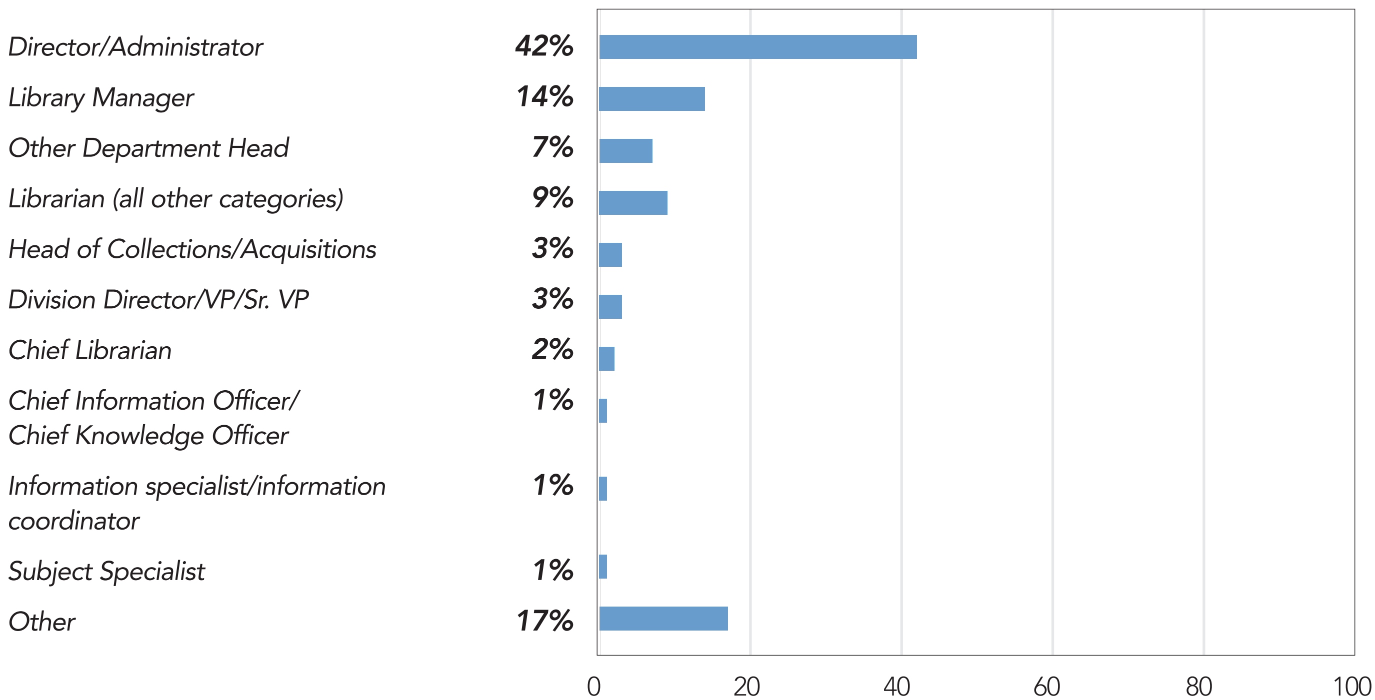
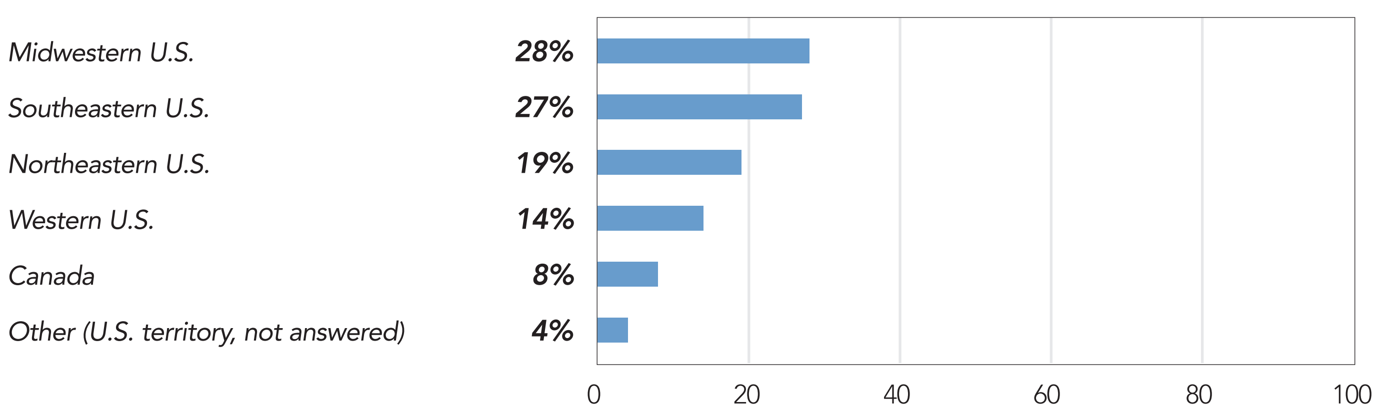


Figure 32: Respondents by Region



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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 between Oct. 15, 2010, and Oct. 31, 2010. As an incentive, respondents were offered a copy of the final results and entry into a drawing for an Apple iPad computer. A total of 1,201 valid surveys were gathered, of which 490 represented public libraries.

ABOUT THE RESEARCHERS

LRG's "Benchmark Study on Library Spending" was conducted by Unisphere Research, the research arm of Information Today, Inc. and publisher of *Database Trends and Applications.* Since 2004, Unisphere has completed more than 80 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, Sybase, Symantec, Teradata, Informatica, VMware, and many others. Unisphere is uniquely capable of producing cogent market analysis through this experience and in its working relationship with the editors of Information Today, Inc.'s (ITI's) library of products.

Information Today, Inc. (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.

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