Library Resource Guide

ACADEMIC LIBRARIES EDITION

THE DIGITAL SQUEEZE: LIBRARIES AT THE CROSSROADS

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2012 LIBRARY SPENDING PLANS

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Produced by Unisphere Research, a division of Information Today, Inc.
April 2012

Sponsored by ProQuest

Published by UNISPHERE RESEARCH
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Data collection and analysis performed with SurveyMethods.

HIGHLIGHTS

Faced with tight or stagnant budgets, academic libraries are re-assessing and shifting their roles within North America's universities, colleges, and technical schools. Many patrons of today's academic libraries are students who are members of Generation Y, and have grown up expecting rapid delivery of information via the latest consumer technology. Today's academic libraries may still be located within a physical facility on campus with four walls, but the services and materials that libraries are delivering increasingly are online. Libraries need to be available 24x7, from any device students may bring on campus.

These are the findings of a new study, conducted by the Library Resource Guide (LRG)—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, conducted in December 2011 among libraries listed in ITI's American Library Directory, reveals current spending patterns for academic libraries—defined as libraries that are part of universities, colleges, community colleges, and technical schools—and provides projections for budgets and spending trends for 2012. In total, 291 academic library managers or librarians participated in this year's survey. In separate reports in this series, public community, government, and special libraries are also covered.

A majority of the academic libraries covered in this survey, 82%, are affiliated with four-year and graduate-level universities and colleges. Another 18% represent community colleges and two-year technical schools.

Among the participants in the survey are directors, administrators, managers, department heads, and librarians from the complete range of library settings. The largest segment, 31%, are directors and administrators, and 17% are librarians across various categories. (For detailed demographic breakdowns, see Figures 40–43 at the end of this report.)

Libraries covered in the survey represent a range of structures, sizes, and segments. More than a third, 33%, serve populations of fewer than 2,500 full-time-equivalent students, and 18% serve academic settings between 2,500 and 5,000 students. Another 20% service between 5,000 and 10,000 students. Twenty-five percent report their schools, colleges, or universities have more than 10,000 students enrolled.

Close to half, 47%, are single, independent, or standalone libraries, while another 21% are single facilities that are part of a larger multi-campus or multi-branch system. About 13% of respondents are reporting for entire library systems with multiple campuses, branches, or facilities. Another 15% did not answer for this category because they were unable to report budget figures.

Geographically, the largest segment, 30%, came from the South/Southeast United States (including Puerto Rico), and 29% are from Midwestern schools. Another 20% represented libraries in the northeastern states, and 14% in the West (including Hawaii). Six percent of respondents are in Canadian provinces, primarily Ontario.

Key findings from the survey include the following:

- Overall, funding for academic libraries has remained steady over the past year, and respondents see this trend continuing for the year ahead. Much of the funding streaming into academic libraries is helping to maintain staffing levels, but there is an increasing amount of resources being migrated to digital formats. Digital content now consumes as much of academic libraries' budgets as printed materials.
- The shift to the digital library has accelerated noticeably since the last survey just a year ago. More than three-fourths of respondents report that demand for their libraries' electronic offerings has increased over the past year, and a majority say there is rising demand for ebooks from students and faculty. More academic libraries are embracing cloud computing as well to help meet patron needs.
- Digital dominates the agendas of most academic libraries this year, with respondents focusing more of their time and resources on increasing the availability of online publications and increasing digital access to these resources—part of a larger long-term shift to serving as digital information hubs for their campuses. Budgets remain tight, and many institutions are exploring new sources of funding.

Ultimately, the concept of a campus library is evolving to mean more than a physical facility with four walls. "Students want the same amount of resource access and support when they research remotely as they do when they are on campus in the library," says the chief librarian for a college in Kansas. "That includes library orientation and research training. Additionally, proxy access to resources is essential. Resource use drops dramatically when students don't have seamless access. Students also want an adequate amount of resource media. They want books, mags, journals, videos, databases ... all of it. And for recreation, not just school support."

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STATE OF LIBRARY FINANCES: PURSE STRINGS LOOSEN, BUT BUDGETS STILL TIGHT

Overall, funding for academic libraries has remained steady over the past year, and respondents see this trend continuing for the year ahead. Much of the funding streaming into academic libraries is helping to maintain staffing levels, but there is an increasing amount of resources being migrated to digital formats. Digital content now consumes as much of academic libraries' budgets as printed materials.

Survey respondents were asked for their specific role in planning or managing their libraries' budgets, and those with budgetary authority were asked to provide annual spending figures and projections. In total, 72% had a significant level of budget authority, and another 21% influenced or made recommendations over library expenditures. (See Figure 1.)

Overall, the available funding for academic libraries has remained steady over the past year. When asked for general budget ranges, a total of 40% of respondents report having annual budgets exceeding $1 million, about the same as a year ago (39%). At the high end, the percentage reporting annual budgets exceeding $5 million held steady, at about 8% of respondents. At the lower end of the spectrum, the percentage of libraries with budgets of $500,000 or less also held steady, at 35%. (See Figure 2.)

Respondents also provided their exact total annual budgets for fiscal year 2012 and projections for 2013, 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 multi-branch systems—budget results are presented across three structural categories:

- Single, independent libraries
- Single libraries within multi-branch systems
- Entire multi-branch systems

In terms of reported annual budgets, the average across both single standalone academic libraries and those that are part of a multi-branch or multi-campus system is about $2,027,900 a year. Among community colleges and two-year technical schools, the average library budget is $1,017,856. Among four-year and post-graduate universities and colleges, the average is $2,267,910.

For respondents reporting for entire systems, which encompass multiple branches or facilities, the average reported budget in this survey is $5.1 million a year. (See Figure 3. Year-to-year comparisons for single libraries within multi-branch systems and entire systems are not available due to a change in survey methodology.)

Academic library budgets vary greatly in terms of the size of the populations they serve. Those libraries serving schools, colleges, or universities with a full-time equivalent enrollment of more than 10,000 students report average annual budgets of about $5.3 million. By contrast, libraries in smaller settings of 5,000 to 10,000 full-time students have budgets of about $2 million. Among institutions with 2,500 to 5,000 students, budgets are half that amount, averaging about $1 million. The smallest institutions in the survey—serving fewer than 2,500 students—have library budgets averaging $800,000 a year. (See Figure 4.) Throughout this survey report, we will be exploring the differing trends and requirements seen among these various size groups.

The average budget numbers reported by respondents in this survey may have shown increases, but these increases appear to be spotty, and likely are being quickly absorbed into year-to-year increases in operational and acquisition costs. There is also a great deal of uncertainty about future budgets. Looking at the percentage of respondents reporting budget changes, those seeing rising budgets are up significantly from last year's survey, from 24% to 37% of respondents. For the year ahead, however, the largest slice of respondents predict things will hold steady at their current levels. (See Figure 5.)

The smallest institutions were most likely to report growth over the past year, while libraries in mid-sized settings had the least growth. (See Figure 6.)

Much of the funding streaming into academic libraries is helping to maintain staffing levels. In terms of where funding is being directed, respondents report that personnel and staffing now consume more than half of their annual budgets, up from 43% a year ago. There has been some slippage in the proportion of funding for content acquisition, collection development, and equipment purchases, moving from 34% of budgets to 30%. Hardware purchases also take up a slightly smaller slice of the budget pie—decreasing from 11% to 9%. The proportion dedicated to operations and facilities is about the same. (See Figure 7.)

While mid-sized libraries devoted the highest proportion of their budgets to personnel costs, the smallest libraries in the survey were more likely to be spending more of their budgets

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on content acquisitions and collections, as well as computer equipment and hardware (See Figure 8.)

As shown throughout this survey report, the pace of library migrations to digital formats has been accelerating over the past year since the previous LRG survey was conducted. Digital content now consumes as much of academic libraries' budgets as do printed materials. Forty-seven cents on every dollar is dedicated to print materials, about the same as in the last survey. Forty-eight cents go to online databases, digital content collections, media titles and ebooks. As the survey will show, there is enormous interest and preparation for ebooks. However, ebooks actually take up very little of academic library budgets so far—only 4% of budgets. (See Figure 9.)

Larger academic libraries are spending the largest shares of their budgets on electronic solutions, including online databases and digital content collections. (See Figure 10.)

Seventy-nine percent of respondents report taking some type of action to address budget shortfalls over the past year. Print subscriptions took the biggest hit, cited by more than half of the respondents, and in line with last year's cuts. Close to a third also report salary freezes, though these were not as prevalent as last year—dropping from 41% to 31% of sites. There was also less cutting into travel and training budgets—30% report scaling back in this area, down substantially from 48% in last year's LRG survey. One-fourth report actual staffing cutbacks, a level relatively unchanged from a year ago. (See Figure 11.)

By size segments, mid-size academic libraries were more likely to be reporting the deepest cuts. For example, 61% of managers at libraries serving populations between 2,500 and 5,000 full-time students report they cut print subscriptions. By comparison, 47% of the smallest libraries and 54% of libraries in the largest institutions made such cuts over the past year. Likewise, libraries in this mid-sized group (2,500–5,000 students) were more likely than their smaller or larger counterparts to report salary freezes, and led the way with cuts in travel and training budgets. Libraries in the upper-midrange sector (5,000–10,000 students) showed the greatest impetus to move more of their materials online as a way to cut costs. These libraries also suffered the most with staff layoffs and cutbacks in hours. (See Figure 12.)

As noted above, there has been an overall rise in the actual sizes of academic library budgets across the board, and, as a result, there are areas that are seeing ramp-ups in spending. A majority of respondents, 76% report having areas with increased spending, up from 72% a year ago. All spending increases are going to technology-based offerings. Most notably, there has been a significant surge in acquisitions of online subscriptions and ebooks by academic libraries over the past year. A total of 44% of respondents report that they have increased spending on online subscriptions, up from 30% just one year ago. Also up sharply is spending on ebooks, rising from 22% to 34% of respondents. Modest increases were also seen in purchases of digital content collections purchases (from 16% to 19%) and library equipment (10% to 15%). Spending on personnel is also up, from 12% reporting increases last year to 16% this year. (See Figure 13.)

As indicated above, mid-size academic libraries suffered the brunt of budget cutbacks over the past year. However, at the same time, most expansion activities were also seen in these libraries. This points to the spotty nature of budget cutbacks and allocations, suggesting that while efforts are underway to pare back some traditional areas of libraries, more funding is being funneled into newer initiatives that are part of the evolution to the digital library. The need to cut and reallocate resources may be more acute in mid-size institutions than their larger counterparts, which can still absorb the costs of legacy services and assets. For example, libraries serving student populations between 5,000 and 10,000 students were leading the way in terms of investments in both ebooks and digital content collections and services. Libraries in this size range were also more likely than others—larger or smaller—to be ramping up acquisitions of both IT equipment and services. (See Figure 14.)

Overall, academic libraries report they have seen more funding streaming in from their institutions—82% are receiving direct support, versus 78% in the survey a year ago. About half, 46%, say they are recipients of funding from their respective states—up from one-third in last year's survey. Gifts and donations are also up—from 19% to 25%, as are endowment funds (17% to 24%). Grants have doubled as a funding source as well, received at 15% of academic libraries, up from 8% in the previous LRG survey. (See Figure 15.)

During the year 2011, the final portions of federal stimulus funding intended to pick up the economy from the most recent recession were distributed. One-third of the libraries in this survey report they felt at least a dent their budgets as a result of the withdrawal of this stimulus spending. However, only 11%, say their libraries' operations or programs were severely impacted by the withdrawal of stimulus funds. (See Figure 16.)

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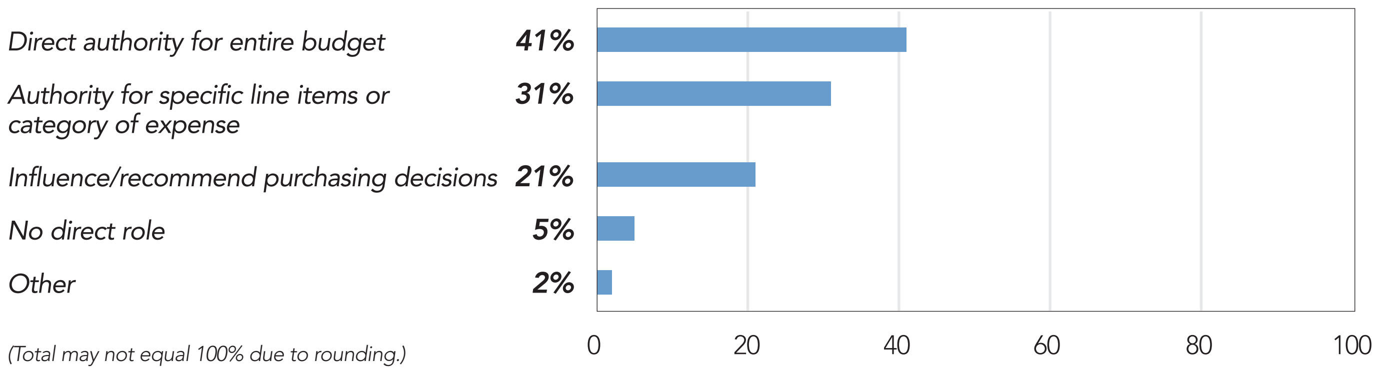
Figure 1: Respondents' Roles in Managing Academic Library Budgets



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

Figure 2: Annual Academic Library Budget Ranges

(Includes all costs, including operations, acquisitions, and staffing)	2011	2012
Less than $100,000	—	*6%*
$100,000 to $500,000	*36%**	*29%*
$500,000 to $1,000,000	*15%*	*13%*
$1 million to $3 million	*25%*	*22%*
$3 million to $5 million	*7%*	*10%*
More than $5 million	*7%*	*8%*
Don't know/unsure	*10%*	*11%*

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

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Figure 3: Academic Library Budgets—By Library Structure

	2011	2012
Single independent academic libraries	***$1,252,232***	***$1,256,170***
Single library with/in multi-branch, multi-location system	*	***$1,815,985***
Academic library system with multiple branches/facilities	*	***$5,118,671***

**Year-to-year comparisons for single libraries within multi-branch systems and entire systems are not available due to a change in survey methodology.*

Figure 4: Academic Library Budgets—By Full-Time Enrollment

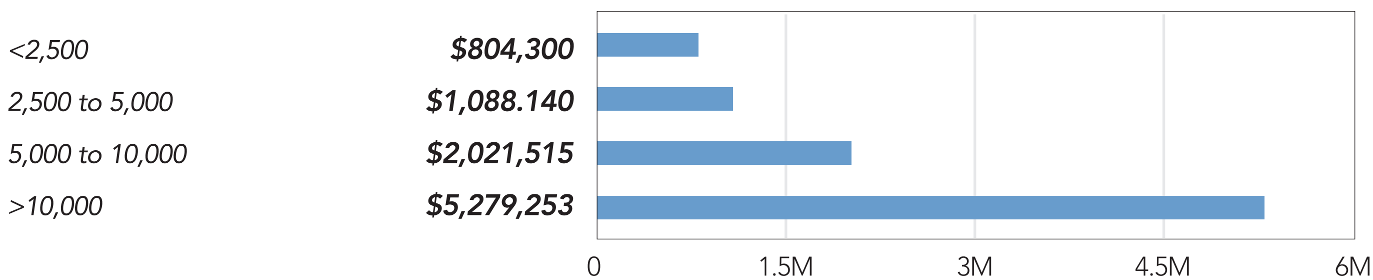

Figure 5: Changes in Academic Library Budgets

	2009–2010	2010–2011	2011–2012 (PROJECTED)
Increase	***24%***	***37%***	***28%***
No change	***31%***	***27%***	***36%***
Decrease	***38%***	***33%***	***23%***
Don't know/unsure	***6%***	***2%***	***11%***

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

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Figure 6: Increases in Academic Library Budgets —By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Increase 2010–2011	**46%**	**33%**	**34%**	**36%**
Increase 2011–2012 (projected)	**34%**	**11%**	**18%**	**32%**

Figure 7: Allocation of Overall Academic Library Budgets

	2011	2012
Personnel/staffing	**43%**	**51%**
Content acquisitions/collection development	**34%**	**30%**
Library systems, computers, A/V, media equipment, software/svcs	**11%**	**9%**
Operations/facilities	**6%**	**6%**
Other	**5%**	**3%**

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

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Figure 8: Allocation of Academic Library Budgets —By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Personnel/staffing	49%	54%	50%	51%
Operations/facilities	5%	7%	7%	6%
Content acquisitions/collection development	31%	27%	28%	34%
Library systems, computers, A/V,media equipment, software/svcs	11%	9%	7%	7%
Other	4%	3%	8%	1%

(Responses may not total 100% due to rounding.)

Figure 9: Allocation of Academic Library Content Acquisitions Budgets

	2011	2012
Online databases, digital content collections	35%	40%
Printed books & other printed materials	25%	25%
Serials/periodicals (print)	23%	22%
Media titles (video, audio, computer-based modules, etc.)	5%	4%
Ebooks	4%	4%
Other (microforms, manuscripts, archives, preservation, etc.)	2%	2%
All other categories	4%	2%

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

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Figure 10: Allocation of Academic Library Content Acquisitions Budgets—By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Printed books & other printed materials	***30%***	***21%***	***25%***	***15%***
Media titles (video, audio, computer-based modules, games, etc.)	***5%***	***5%***	***3%***	***3%***
Serials/Periodicals (print)	***22%***	***23%***	***15%***	***23%***
Online databases, digital content collections	***33%***	***41%***	***49%***	***53%***
Ebooks	***4%***	***6%***	***4%***	***4%***
Special programs	***0.5%***	***0%***	***0%***	***1%***
Other (microforms, manuscripts, archives, preservation, etc.	***2%***	***2%***	***1%***	***2%***
All other categories	***3%***	***2%***	***3%***	***1%***

(Responses may not total 100% due to rounding.)

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Figure 11: Actions Taken by Academic Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year

	2011	2012
Cut spending on print subscriptions	**55%**	**52%**
Salary freezes	**41%**	**31%**
Cut or eliminated conference/travel/education budget	**48%**	**30%**
Moved more services/materials online	**33%**	**30%**
Cut spending on online subscriptions	—	**24%**
Staff layoffs/staff hours cut	**22%**	**24%**
Collaborated/shared with other libraries/joined consortia	**19%**	**18%**
Lobbied for more funding from institutions	**17%**	**14%**
Renegotiated contracts with vendors	**23%**	**12%**
Reduced library hours	**18%**	**11%**
Applied for more grants	**14%**	**11%**
Consolidated departments	**13%**	**11%**
Reduced IT expenditures	**9%**	**11%**
Added volunteers	**6%**	**7%**
Reduced programming	**6%**	**5%**
Closed facilities	**2%**	**2%**
Don't know/unsure	**6%**	**2%**
Other	**6%**	**9%**
No cuts/budget freezes over past year	**14%**	**21%**

(Multiple responses permitted.)

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Figure 12: Actions Taken by Academic Libraries to Manage or Respond to Budget Cuts or Freezes Over the Past Year —By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Cut spending on print subscriptions	**47%**	**61%**	**44%**	**54%**
Salary freezes	**22%**	**46%**	**39%**	**29%**
Cut or eliminated conference/travel/education budget	**22%**	**39%**	**28%**	**42%**
Moved more services/materials online	**12%**	**43%**	**56%**	**33%**
Cut spending on online subscriptions	**14%**	**32%**	**17%**	**42%**
Staff layoffs/staff hours cut	**18%**	**25%**	**39%**	**25%**
Collaborated/shared with other libraries/ joined consortia	**10%**	**29%**	**33%**	**8%**
Lobbied for more funding from institutions	**6%**	**25%**	**11%**	**21%**
Renegotiated contracts with vendors	**4%**	**11%**	**17%**	**29%**
Reduced library hours	**2%**	**14%**	**22%**	**17%**
Applied for more grants	**6%**	**14%**	**6%**	**21%**
Consolidated departments	**2%**	**14%**	**11%**	**25%**
Reduced IT expenditures	**4%**	**7%**	**11%**	**33%**
Added volunteers	**8%**	**7%**	**6%**	**4%**
Reduced programming	**0%**	**14%**	**11%**	**0%**
Closed facilities	**0%**	**0%**	**0%**	**8%**
Don't know/unsure	**4%**	**0%**	**0%**	**4%**
Other	**13%**	**7%**	**5%**	**12%**
No cuts/budget freezes over past year	**29%**	**11%**	**17%**	**21%**

(Multiple responses permitted.)

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Figure 13: Areas Seeing Increased Spending or Support in Academic Libraries Over the Past Year

	2011	2012
Online subscription acquisitions	***30%***	***44%***
Ebooks	***22%***	***34%***
Digital content collections/services	***16%***	***19%***
Personnel	***12%***	***16%***
Library technology equipment, software	***10%***	***15%***
Book acquisitions	***6%***	***10%***
Periodicals/serials acquisitions	***6%***	***8%***
Cloud-based solutions	***1%***	***8%***
Multimedia/streaming media	***11%***	***8%***
Facilities upgrades/maintenance	***5%***	***7%***
Operations	***3%***	***7%***
Library hours/availability	***5%***	***6%***
IT services	***2%***	***4%***
Print subscription acquisitions	—	***3%***
Don't know/unsure	***10%***	***5%***
Other	***2%***	***6%***
No areas seeing increased spending/support	***28%***	***24%***

(Multiple responses permitted.)

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Figure 14: Areas Seeing Increased Spending or Support in Academic Libraries Over the Past Year—By Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Online subscription acquisitions	46%	46%	37%	44%
Ebooks	26%	29%	53%	44%
Digital content collections/services	10%	21%	26%	24%
Personnel	16%	18%	16%	12%
Library technology equipment, software	14%	18%	21%	12%
Book acquisitions	12%	4%	16%	8%
Periodicals/serials acquisitions	8%	7%	11%	8%
Cloud-based solutions	4%	7%	11%	16%
Multimedia/streaming media	2%	14%	5%	16%
Facilities upgrades/maintenance	4%	7%	11%	12%
Operations	6%	11%	11%	4%
Library hours/availability	8%	7%	0%	8%
IT services	2%	4%	16%	0%
Print subscription acquisitions	4%	0%	11%	0%
Don't know/unsure	4%	4%	11%	4%
Other	8%	7%	5%	4%
No areas seeing increased spending/support	30%	21%	16%	20%

(Multiple responses permitted.)

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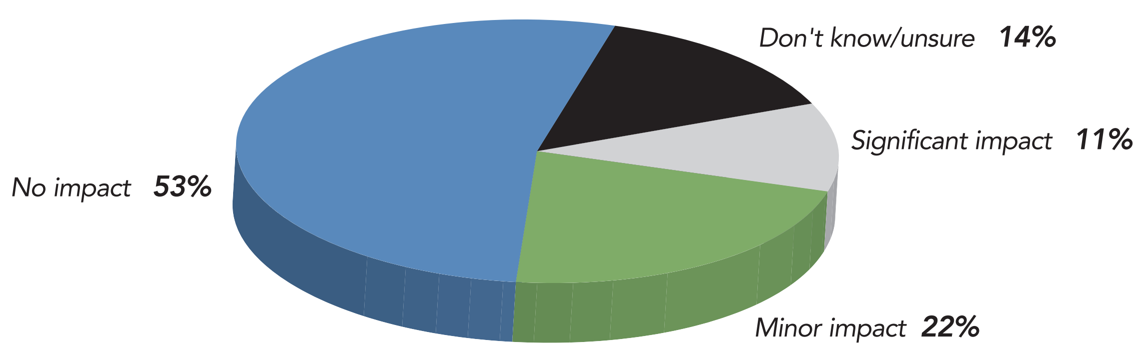
Data collection and analysis performed with SurveyMethods.

Figure 15: Primary Sources of Academic Library Funding

	2011	2012
University/school tuition funding	***78%***	***82%***
Public funding-state	***33%***	***46%***
Gifts and donations	***19%***	***25%***
Endowments	***17%***	***24%***
Grants	***8%***	***15%***
Public funding-local	***8%***	***11%***
Public funding-federal	***5%***	***10%***
Fee-based services	***2%***	***6%***
IT fees	—	***6%***
Special fundraising events	***2%***	***2%***
Don't know/unsure	***3%***	***4%***
Other	***1%***	***5%***

(Multiple responses permitted.)

Figure 16: Impact Of Withdrawal of Federal Stimulus Money on Academic Libraries



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RISE OF THE DIGITAL ACADEMIC LIBRARY

The shift to the digital library has accelerated noticeably since the last survey just a year ago. More than three-fourths of respondents report that demand for their libraries' electronic offerings has increased over the past year, and a majority say there is rising demand for ebooks from students and faculty. More academic libraries are embracing cloud computing as well to help meet patron needs.

In tandem with increased demand for libraries' electronic offerings, demand for print resources is dropping. Forty-one percent of academic librarians and library managers say demand for print has declined, close to double the number reporting any increases. (See Figure 17.)

Demand for ebooks is soaring as well. Three-fifths of respondents say they are seeing rising demand from students, faculty, and staff for ebook access, up from 44% a year ago. There has also been a surge in demand for computer and web resources, rising from 56% to 66%. Seven out of 10 respondents report that their libraries are important centers for wireless access, as was the case in last year's survey. Demand is also up for streaming media access, as well as technical information. (See Figure 18.)

Ebook and streaming media is being most acutely felt at the largest institutions in the survey. About 73% of the largest libraries (with more than 10,000 students) reporting demand for ebook offerings, versus half of the smallest colleges. (See Figure 19.)

The demand for online access has been insatiable, some respondents report. However, such services require skills and resources that may be in short supply at many libraries. "Patrons are expecting more and more of the special collections and archival materials to be available online, and we do not receive enough technical support to meet that expectation," says one respondent, a department head at the library of a large university in Texas. "We have received some grant funding, and library funding has helped us place more and more resources online, however."

Another respondent echoes this sentiment, lamenting that digital resources can be expensive to provide, and libraries are struggling to stay ahead of the fast-paced internet economy. "Our patrons will continue to expect more for less—or nothing—at increased bandwidth and on any and all delivery platforms," says the information specialist at a large Alabama university. "They will also continue to expect to have access to everything in the known universe. Needless to say, we fall far short on current funding, and are struggling to meet current needs. It isn't that our resources are that woeful; rather, it is that patrons are impatient and unwilling to truly spend the time learning how to use what's here."

Interestingly, while demand for ebooks is soaring, most acquisitions budgets are still mainly devoted to print resources. There has been a slight uptick in funding going to digital media—this year, 39% of respondents report that more than half of their acquisitions budgets are spent on electronic resources, up from 34% in the previous survey. Academic libraries have not yet reached the point were a majority of their acquisitions dollars go to electronic resources, however. (See Figure 20.)

Looking across library size ranges, demand for electronic resources is most pronounced at the largest institutions surveyed—a majority, 61%, report that most of their funds go to electronic resources. (See Figure 21.)

One-third of academic libraries, 33%, have increased spending on information technology hardware, software, and related IT services (not including online subscriptions) over the past year (since fiscal 2010). This is up from 28% reporting such increases in the survey a year ago. However, respondents are very cautious about their spending in this area over the year ahead, with only 26% anticipating increased spending on IT solutions. For the most part, respondents expect their spending to remain at current levels. (See Figure 22.) This spending pattern was fairly consistent across the size categories covered in the survey. (See Figure 23.)

Spending on online subscriptions at academic libraries is also up over the past year, rising from 59% increasing spending to 64%. While only 6% indicated they were cutting back on such spending over the next 12 months, some caution prevails, with just over half intending to keep increasing their spending for these services. (See Figure 24.) This pattern is also seen across the size ranges. Smaller institutional libraries are somewhat more positive about their purchases in the year ahead. (See Figure 25.)

Adoption of IT resources from public cloud computing providers is on the rise, the survey finds. A number of cloud services are available that provide a range of capabilities—from IT-centric tasks such as hosting servers and providing storage to business applications such as maintaining patron files or financial packages. More than two-fifths of academic libraries in the LRG survey, 44%, are either already using or planning to use cloud computing at their libraries, up from 36% last year. Almost one-fourth of academic library managers report they currently have functioning cloud engagements in place, up from 20% a year ago. (See Figure 26.)

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Cloud adoption is close to evenly distributed across the student population segments covered in the survey. Half of the libraries serving the largest student populations report they are either using or planning to use cloud-based resources, compared to 43% of the smallest institutions in the survey. (See Figure 27.)

There has been a notable shift toward cloud-based infrastructure services for handling computing functions such as storage and processing. Forty-two percent of academic libraries now use or soon plan to use such services, almost double the level seen in last year's LRG survey. The infrastructure-as-a-service adoption has surpassed academic libraries; embrace of cloud for communication functions such as web conferencing, video, podcasting, email, and collaboration, now employed or about to be employed at 39% of sites. There is also more interest in adopting software-as-a-service type business applications for running library operations, such as business, management, marketing, or market research. (See Figure 28.)

Along with the migration to digital formats among libraries, there has been a rise in automation capabilities. When looking at the various information technology tools and platforms being adopted within academic libraries, there has been a significant rise in integrated library systems (ILSs), as well as networks and computer devices, reported. Nine-tenths of academic libraries now run with ILSs, up from 81% a year ago. An ILS, also referred to a library management system, is an enterprise resource planning system for a library, used to track items owned, orders made, bills paid, and patrons who have borrowed. Many libraries use ILSs to order and acquire, receive and invoice, catalog, circulate, track, and shelve materials. Also in widespread use in academia are online library catalogs, or OPACs, which provide a public interface for users from the back-end ILS. Other tools and platforms in greater use this year are authentication solutions (rising from 51% to 62%), and discovery services (21% to 35%). Discovery services serve as search engines for the libraries themselves, directing patrons to the most appropriate content for their searches that the library has available. As observed throughout this report, demand and support for ebooks is growing, and more than one-fourth of academic libraries now have ebook readers—up from 15% a year ago. (See Figure 29.)

When looking at technology platform adoption by size of academic institution, there is a fairly widespread embrace of technology platforms such as online catalogs, library management systems, networks, and equipment. Adoption of ebooks is also evenly felt across libraries at smaller schools as well as their largest counterparts, the survey finds. Larger facilities are more likely to offer audio and video teleconferencing capabilities. (See Figure 30.)

Ebooks also dominate the purchasing plans of academic libraries going forward. Close to one-third of the academic libraries in the survey, 32%, plan to purchase ebook readers this year, making this the top purchasing priority. This is double the percentage in last year's survey. Discovery services—the internal library search engines—are also a hot item, with purchasing plans for these solutions jumping from 19% to 30%. Computer hardware purchasing plans remain unchanged. (See Figure 31.)

Academic libraries' adoption of social media platforms or services are mixed, and mainly lukewarm. The most pronounced effort seen among respondents is focused on the use of LibGuides for collaboration, and to create and maintain subject guides, course guides, and research information, or even to create and maintain library websites. Adoption has risen from 45% a year ago to 52% today, surpassing social networking services as a primary collaboration methodology. Social networking itself appears to be on the wane as an academic library resource. Just over two-fifths of respondents, 44%, indicate their libraries are engaging patrons through sites such as Facebook or Twitter, down from 57% a year ago. Likewise, adoption of wikis and blogs has diminished, from 41% to 30%. It appears that an era of experimentation with various publicly available social media has produced lackluster results, and academic libraries are focusing more attention and resources on services that can be delivered internally. (See Figure 32.)

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Data collection and analysis performed with SurveyMethods.

Figure 17: Change in Demand for Academic Library Print and Electronic Offerings Over the Past Year

	ELECTRONIC		PRINT	
	2011	2012	2011	2012
Increase	***77%***	***77%***	***25%***	***24%***
No change	***6%***	***5%***	***19%***	***16%***
Decrease	***1%***	***2%***	***29%***	***41%***
Don't know/unsure	***16%***	***15%***	***17%***	***20%***

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

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Figure 18: What Academic Library Patrons Have Been Requesting Over the Past Year

	2011	2012
Wireless access	***72%***	***70%***
Computer/web access	***56%***	***66%***
Ebooks	***44%***	***60%***
Streaming media	***30%***	***36%***
Technical information/training	***26%***	***32%***
Medical	***18%***	***21%***
Job search/career development information	***11%***	***12%***
Audiobooks	***11%***	***12%***
Primary and continuing education programs/requirements	***8%***	***10%***
Computer games/simulations	***7%***	***6%***
English language instruction	***7%***	***6%***
Don't know/unsure	***10%***	***10%***
Other	***4%***	***2%***

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 19: What Academic Library Patrons Have Been Requesting Over the Past Year—By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Wireless access	***69%***	***70%***	***71%***	***77%***
Ebooks	***50%***	***60%***	***76%***	***73%***
Computer/web access	***67%***	***70%***	***62%***	***65%***
Job search/career developmentinformation	***10%***	***13%***	***10%***	***15%***
Audiobooks	***14%***	***10%***	***5%***	***12%***
Technical information/training	***31%***	***33%***	***38%***	***35%***
Computer games/simulations	***7%***	***3%***	***0%***	***12%***
Streaming media	***26%***	***40%***	***38%***	***50%***
Primary and continuing education programs/requirements	***16%***	***10%***	***5%***	***0%***
English language instruction	***5%***	***10%***	***10%***	***4%***
Medical	***22%***	***20%***	***19%***	***23%***
Don't know/unsure	***7%***	***7%***	***14%***	***12%***
Other	***1%***	***3%***	***1%***	***3%***

(Multiple responses permitted.)

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Figure 20: Percent of Academic Library Acquisitions Budgets Spent on Electronic Resources

	2011	2012
Less than 10%	***8%***	***7%***
11% to 25%	***10%***	***11%***
26% to 50%	***25%***	***26%***
More than 50%	***34%***	***39%***
Don't know/unsure	***23%***	***17%***

Figure 21: Percent of Academic Library Acquisitions Budgets Spent on Electronic Resources —By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Less than 10%	***11%***	***4%***	***10%***	***0%***
11% to 25%	***18%***	***11%***	***5%***	***4%***
26% to 50%	***33%***	***29%***	***24%***	***8%***
51% to 75%	***22%***	***39%***	***24%***	***38%***
76% to 99%	***7%***	***7%***	***5%***	***23%***
100%	***0%***	***0%***	***0%***	***0%***
Don't know/unsure	***9%***	***11%***	***33%***	***27%***

(Responses may not total 100% due to rounding.)

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Data collection and analysis performed with SurveyMethods.

Figure 22: Changes in Academic Library Spending on Information Technology Hardware, Software and Related IT Services

(Not including online subscriptions)	2009–10	2010–11	2011–12 (PROJECTED)
Increase	***28%***	***33%***	***26%***
No change	***33%***	***32%***	***39%***
Decrease	***10%***	***7%***	***7%***
Don't know/unsure	***29%***	***26%***	***27%***

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

Figure 23: Changes in Academic Library Spending on Information Technology Hardware, Software and Related IT Services —By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Increased 2010–2011	***34%***	***35%***	***34%***	***31%***
Increased 2011–2012 (projected)	***28%***	***34%***	***19%***	***24%***

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Data collection and analysis performed with SurveyMethods.

Figure 24: Changes in Academic Library Spending on Online Subscriptions

	2009–10	2010–11	2011–12 (PROJECTED)
Increase	***59%***	***64%***	***51%***
No change	***17%***	***16%***	***26%***
Decrease	***7%***	***10%***	***6%***
Don't know/unsure	***17%***	***11%***	***16%***

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

Figure 25: Changes in Academic Library Spending on Online Subscriptions—By Student Population Size Served

	<2.5K	2.5K–5K	5K–10K	>10K
Increased 2010–2011	***53%***	***62%***	***35%***	***50%***
Increased 2011–2012 (projected)	***67%***	***64%***	***60%***	***58%***

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Data collection and analysis performed with SurveyMethods.

Figure 26: Access Cloud Computing Resources?

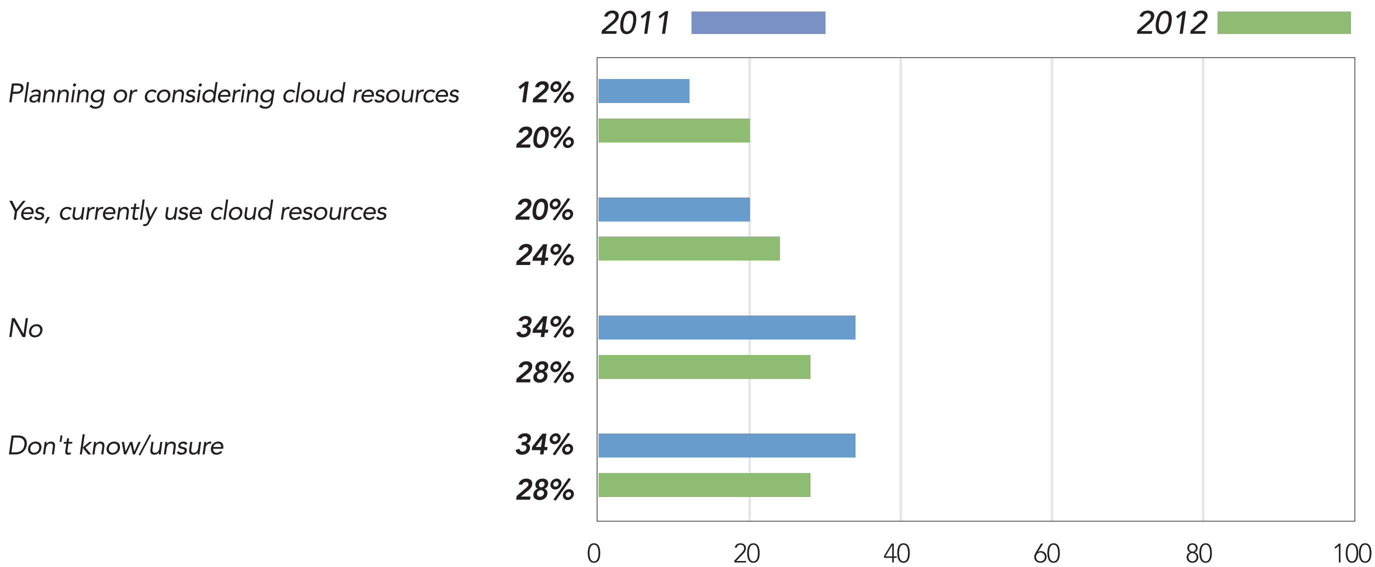

Figure 27: Access Cloud Computing Resources —By Full-Time Enrollment

	<2.5K	2.5K–5K	5K–10K	>10K
Yes, currently use cloud resources	***18%***	***21%***	***20%***	***27%***
Planning or considering cloud resources	***25%***	***24%***	***20%***	***23%***
No	***31%***	***31%***	***25%***	***23%***
Don't know/unsure	***25%***	***24%***	***35%***	***27%***

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

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Data collection and analysis performed with SurveyMethods.

Figure 28: Cloud Computing Services Used or Planned for Use by Academic Libraries

	2011	2012
IT infrastructure (online storage, processing)	***23%***	***42%***
Communications (web conferencing, video, podcasting, email, collaboration)	***34%***	***39%***
Specialized business applications (business, management, marketing, market research)	***4%***	***11%***
Don't know/not sure	***55%***	***36***
Other	***4%***	***6%***

(Multiple responses permitted.)

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Figure 29: Current Information Technology Tools and Platforms Used Within Academic Libraries

	2011	2012
Online library catalog/OPAC	***94%***	***97%***
Integrated Library System (ILS)	***81%***	***90%***
LAN/WAN/wireless network	***81%***	***84%***
Intranet/extranet/website	***66%***	***75%***
PCs/kiosks/laptops/mobile devices	***66%***	***72%***
Web-based (IM or email) reference service	***69%***	***70%***
Authentication solutions	***51%***	***62%***
Link resolvers	***57%***	***61%***
Electronic Resource Management Systems	***37%***	***36%***
Discovery services	***21%***	***35%***
Audio/video teleconferencing	***20%***	***33%***
Ebook readers	***15%***	***26%***
RFID check-in/check-out, inventory control	***12%***	***17%***
Other	***2%***	***2%***

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 30: Current Information Technology Tools and Platforms Used Within Academic Libraries—By Full-Time Enrollment

	<2.5K	2.5K–5K	5K–10K	>10K
Online library catalog/OPAC	**95%**	**100%**	**94%**	**100%**
Integrated Library System (ILS)	**85%**	**100%**	**89%**	**88%**
LAN/WAN/wireless network	**80%**	**86%**	**83%**	**88%**
Intranet/extranet/website	**71%**	**66%**	**78%**	**88%**
PCs/kiosks/laptops/mobile devices	**60%**	**76%**	**89%**	**80%**
Web-based (IM or email) reference service	**51%**	**72%**	**89%**	**92%**
Authentication solutions	**47%**	**69%**	**83%**	**68%**
Ebook readers	**27%**	**24%**	**28%**	**28%**
Audio/video teleconferencing	**20%**	**28%**	**39%**	**60%**
Electronic Resource Management Systems	**27%**	**24%**	**56%**	**48%**
RFID check-in/check-out, inventory control	**16%**	**7%**	**28%**	**16%**
Link resolvers	**49%**	**55%**	**83%**	**76%**
Discovery services	**20%**	**45%**	**44%**	**48%**
Other	**1%**	**0%**	**5%**	**4%**

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 31: Information Technology Tools and Platforms to Be Purchased by Academic Libraries in 2012

	2011	2012
Ebook readers	16%	32%
Discovery services	19%	30%
PCs/kiosks/laptops/mobile devices	22%	21%
Online library catalog/OPAC	18%	21%
Integrated Library System (ILS)	20%	21%
Intranet/extranet/website	8%	11%
Link resolvers	9%	8%
Electronic Resource Management Systems	10%	7%
LAN/WAN/wireless network	9%	7%
Audio/video teleconferencing	5%	7%
Web-based (IM or email) reference service	9%	7%
Authentication solutions	5%	5%
RFID check-in/check-out, inventory control	5%	2%
Other	18%	10%

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 32: Social Networking Services in Use at Academic Libraries

	2011	2012
Sharing library web pages and subject guides (e.g., LibGuides)	**45%**	**52%**
Social networking (e.g., Facebook, LinkedIn)	**57%**	**44%**
Wikis or blogs	**41%**	**30%**
Document-sharing web apps	**19%**	**23%**
Audio or video podcasts	**21%**	**22%**
Patron reviews, ratings	**21%**	**13%**
Tagging and rating	**16%**	**13%**
Photo or video-sharing web apps	**15%**	**11%**
Don't know/unsure	**15%**	**27%**
Other	**1%**	**0%**
We don't offer social networking tools/opportunities	**13%**	**9%**

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

STRATEGIES: LOOKING FORWARD INTO THE NEXT DECADE

Digital dominates the agendas of most academic libraries this year, with respondents focusing more of their time and resources on increasing the availability of online publications and increasing digital access to these resources—part of a larger long-term shift to serving as digital information hubs for their campuses. Budgets remain tight, and many institutions are exploring new sources of funding.

When asked what their leading priorities would be over the coming year, 75% of respondents say they want to increase the availability of online publications and increase digital access to these resources, up from 63% a year ago. Likewise, close to two-thirds, 63%, say they intend to increase their commitment to provide assistance and education on information access tools and services. This overwhelming emphasis on digital resources indicates that academic libraries are in the midst of a significant shift from repositories of book and collections to digital information hubs for their campuses. There is also a growing commitment to serving as stewards of collections, be they digital or print. Close to three-fifths of respondents say they seek to better assist their patrons with the discovery of collections, up from 51% a year ago. Another 30% say they want to build unique collections within their libraries, up from 21%. (See Figure 33.)

Nevertheless, tight budgets do remain a challenge for a majority of academic libraries. As shown earlier in the report, many service and acquisition budgets are still being pared, and more than four-fifths of respondents see this as their greatest challenge over the next five years. The requirement to keep up with fast-paced changes in the information technology world is also keeping librarians awake at night, indicated by three-fourths of respondents, 74%, and up from 67% a year ago. Close to half, 47%, also worry about where their funding is coming from, and they are exploring new options. Due to their integral role with the institutions they serve, academic libraries are not as worried as public libraries about competing with resources that are readily available on the web. Only 17% of respondents are concerned about their ability to deliver information or resources that can't be readily found on Google—down from 21% last year. (See Figure 34.)

As observed in the previous section of this report, online databases and digital subscriptions are major spending areas for academic libraries. "The greatest demand will be in paying to maintain subscriptions for access to periodical databases from publishing vendors," says the librarian of a large technical school. "Funding to continue access to these resources will continue to be a challenge."

These challenges, of course, are seen across all academic libraries, regardless of size. Still, the challenges are being felt more acutely at large institutions than at libraries in smaller schools or facilities. For example, keeping pace with technology developments is a greater concern among the smallest facilities. The largest libraries, on the other hand, are more focused on identifying new sources of funding, as well as migrating their print content to the digital realm. (See Figure 35.)

As academic libraries seek to define their new roles in the midst of the cross-currents of lean finances and digital demand, more than one-fourth, 29%, some are articulating their visions through strategic plans, similar to those followed by businesses and government agencies. This is down from last year, however. (See Figure 36.) By library size, larger libraries (from institutions with more than 5,000 students on up) are more inclined to have such plans. (See Figure 37.)

A common strategy for many libraries is to pool their resources and purchases from consortia and networks. A majority indicate they belong to between one and three consortia. (See Figure 38.) Respondents also report greater levels of support from the consortia to which they belong. About 27% report increased support over the past year, up from 23% in last year's survey. (See Figure 39.)

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Data collection and analysis performed with SurveyMethods.

Figure 33: Academic Libraries' Priorities for the Coming Year

	2011	2012
Increase availability of online pubs/digital access	63%	75%
Provide assistance/education on inf. access tools/svcs	61%	63%
Enhance discovery of collections	51%	59%
Improve/expand customer service	48%	51%
Drive usage of current resources	45%	42%
Repurpose physical space	46%	43%
Develop unique library collections	21%	30%
Identify and reach out to new groups of patrons	17%	22%
Enhancing user workflow tools	16%	22%
Join or increase participation in consortium/network	17%	20%
Institute special programs for constituents/patrons	21%	14%
Physical expansion/upgrade of facilities	19%	13%
Don't know/unsure	3%	4%
Other	4%	2%

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 34: Academic Libraries' Challenges Over the Next 5 Years

	2011	2012
Maintaining services with tight budgets	***80%***	***82%***
Keeping up with changes in information technology	***67%***	***74%***
Identifying new sources of funding	***40%***	***47%***
Migrating print content to digital formats	***40%***	***43%***
Finding and retaining knowledgeable staff	***32%***	***34%***
Keeping facilities open/at preferred operational levels	***31%***	***26%***
Competing/keeping up with public online svcs/offerings	***21%***	***17%***
Other	***7%***	***3%***

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 35: Academic Libraries' Challenges Over the Next 5 Years —By Full-Time Equivalent Enrollment

	<2.5K	2.5K–5K	5K–10K	>10K
Maintaining services with tight budgets	86%	86%	86%	73%
Keeping up with changes in information technology	74%	82%	67%	69%
Identifying new sources of funding	37%	43%	67%	62%
Migrating print content to digital formats	42%	39%	43%	54%
Finding and retaining knowledgeable staff	26%	50%	24%	38%
Keeping facilities open/at preferred operational levels	25%	25%	24%	35%
Competing/keeping up with public online svcs/offerings	12%	21%	14%	23%
Other	5%	7%	0%	0%

(Multiple responses permitted.)

Figure 36: Academic Library Have Strategic Plan?

	2011	2012
Yes	36%	29%
Under development	27%	29%
Under consideration	9%	17%
No	19%	24%
Don't know/unsure	8%	1%

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

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Data collection and analysis performed with SurveyMethods.

Figure 37: Academic Library Have Strategic Plan —By Full-Time Equivalent Enrollment

	<2.5K	2.5K–5K	5K–10K	>10K
Yes	***26%***	***18%***	***38%***	***38%***
Under development	***28%***	***39%***	***29%***	***27%***
Under consideration	***19%***	***21%***	***19%***	***0%***
No	***26%***	***21%***	***10%***	***35%***
Don't know/unsure	***0%***	***0%***	***5%***	***0%***

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

Figure 38: Number of Academic Libraries' Consortia or Network Memberships

	2011	2012
None	***3%***	***3%***
One	***19%***	***12%***
Two	***25%***	***23%***
Three	***19%***	***27%***
Four	***11%***	***13%***
Five	***3%***	***4%***
More than 5	***7%***	***7%***
Don't know/unsure	***13%***	***10%***

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

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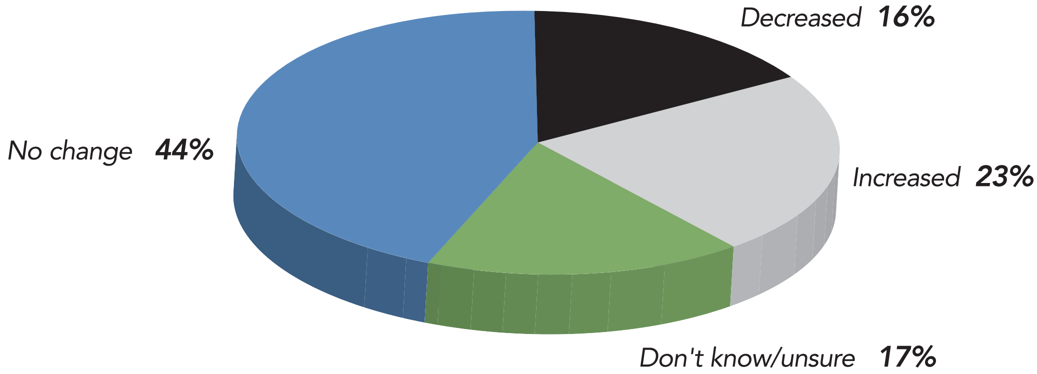
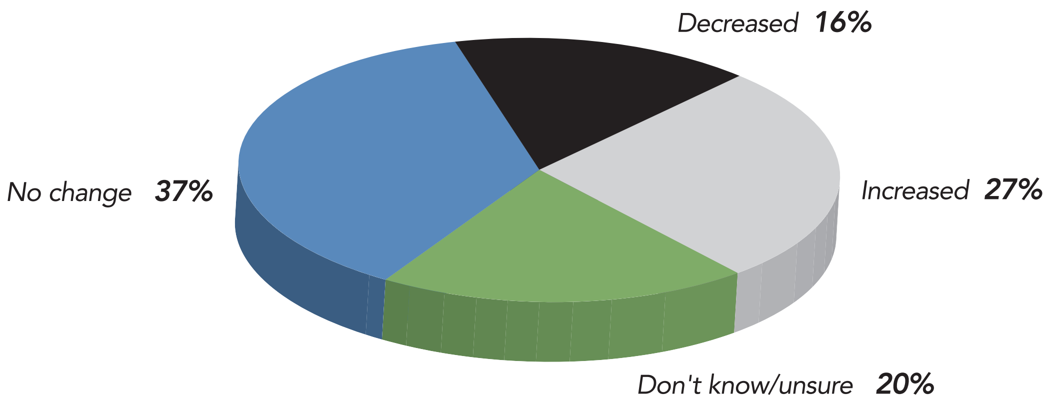
Data collection and analysis performed with SurveyMethods.

Figure 39: Changes in Support from Consortia or Networks to Academic Libraries Over the Past Year

2011



2012



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DEMOGRAPHICS

Figure 40: Respondents' Titles

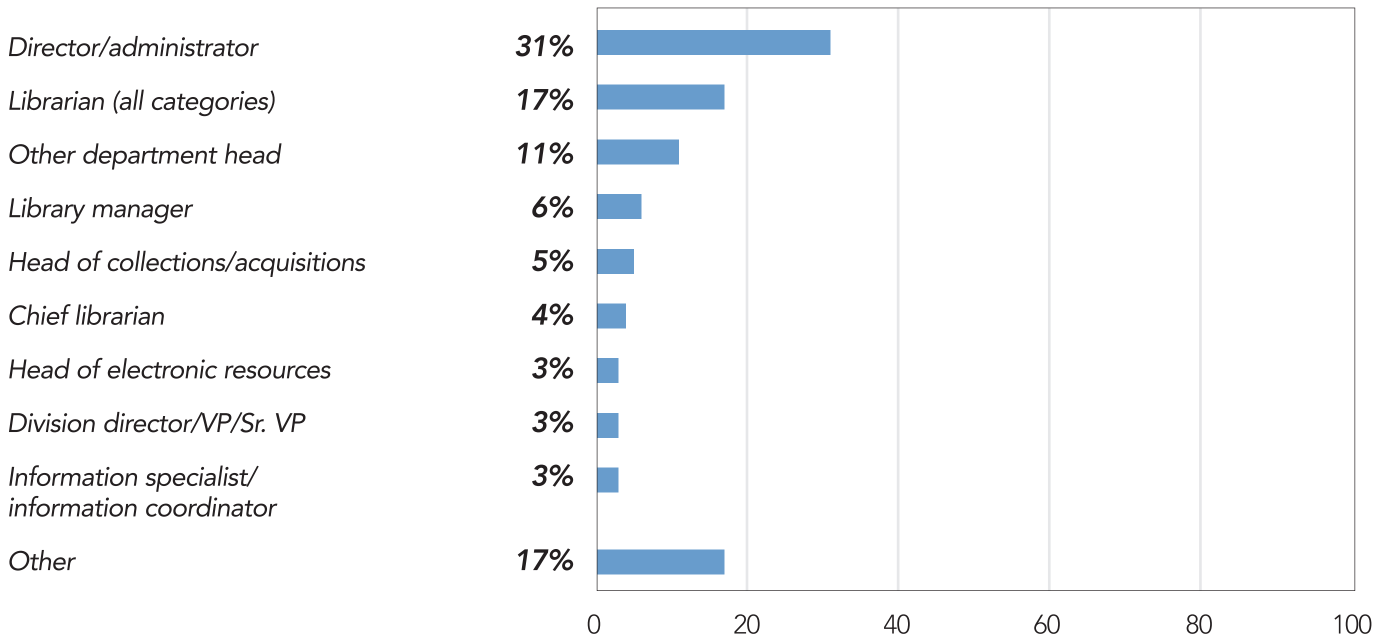

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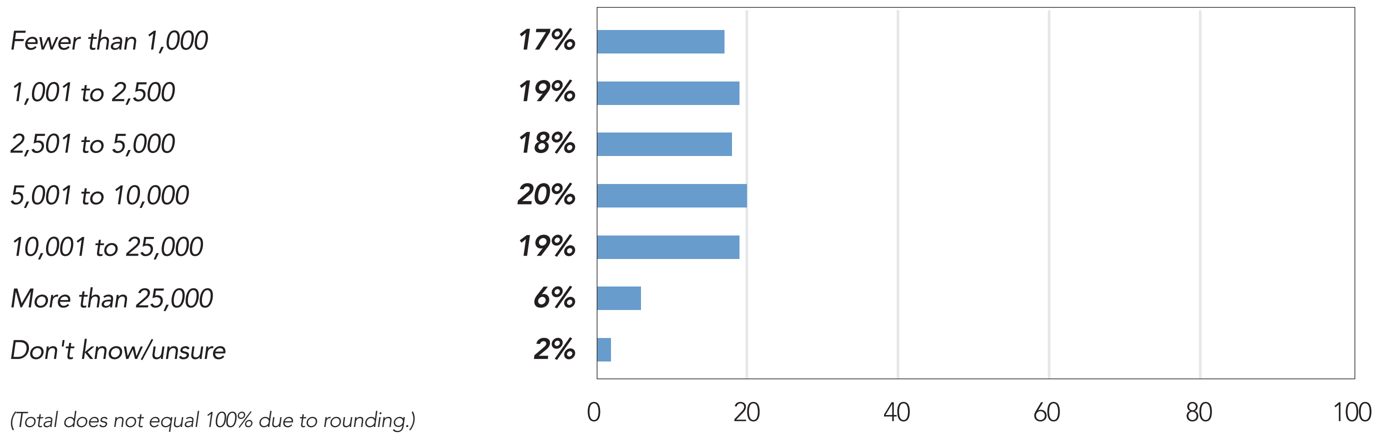
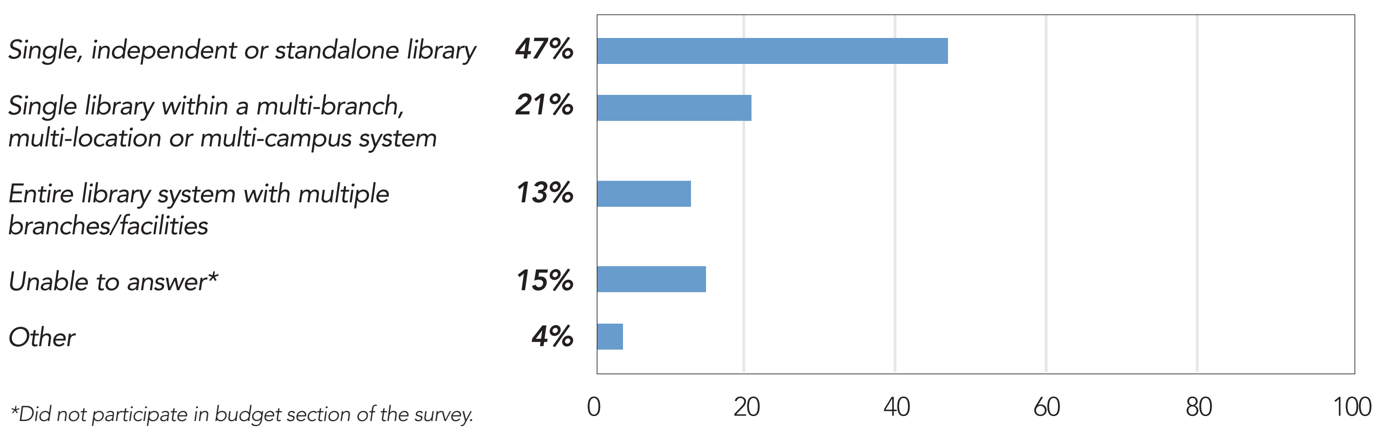
Figure 41: Full-Time Equivalent Enrollment



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

Figure 42: Type of Library Infrastructures Surveyed



**Did not participate in budget section of the survey.*

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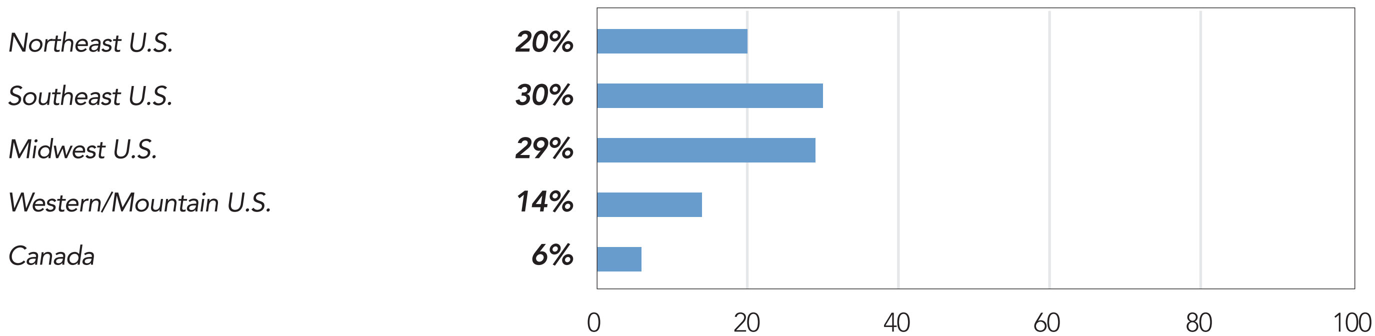
Figure 43: Respondents' States/Provinces



NUMERICAL TOTALS

Northeast U.S.
20%

CT	2
DC	2
DE	0
MD	4
MA	5
ME	0
NH	2
NJ	3
NY	21
PA	13
RI	0
VT	2

Southeast U.S.
30%

AL	6
FL	5
GA	6
KY	3
LA	5
MS	0
NC	8
OK	7
PR	5
SC	1
TN	5
TX	15
VA	11
VI	0
WV	4

Midwest U.S.
29%

IA	4
IL	15
IN	7
KS	4
MI	10
MN	4
MO	12
ND	1
NE	6
OH	7
SD	0
WI	8

Western/ Mountain U.S.
14%

AK	1
AR	4
AZ	4
CA	19
CO	2
HI	2
ID	2
MT	0
NM	0
NV	0
OR	1
UT	1
WA	1
WY	0

Canada
6%

Alberta	3
British Columbia	2
Manitoba	1
New Brunswick	0
Newfoundland and Labrador	0
Nova Scotia	3
NW Territories	0
Nunavut	0
Ontario:	6
Prince Edward Island	0
Quebec	1
Saskatchewan	1
Yukon	0

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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 December 1, 2011, and December 31, 2011. 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 730 valid surveys were gathered.

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 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.

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Owen O'Donnell, Editorial Director, *American Library Directory*
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