Library Resource Guide

PUBLIC LIBRARIES EDITION

THE DIGITAL SQUEEZE: LIBRARIES AT THE CROSSROADS

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2012 LIBRARY SPENDING PLANS

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Data collection and analysis performed with SurveyMethods.

HIGHLIGHTS

The economy may be healing, and more funds are flowing to North America's public libraries. However, libraries continue to feel the sting of cutbacks and budget shortfalls. In addition, the historic shift to digital libraries is accelerating.

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 public libraries—defined as libraries supported by municipalities, counties, or communities—and provides projections for budgets and spending trends for 2012. In total, 299 public library managers or librarians participated in this year's survey. In separate reports in this series, academic, government, and special libraries are also covered.

Among the participants in the survey are directors, administrators, managers, department heads, and librarians from the complete range of library settings. The largest segment, 47%, are directors and administrators, and 13% are library managers. (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. Among the libraries covered in this survey, about one-fourth, or 23%, serve populations of fewer than 10,000 constituents, and 16% serve communities between 10,000 and 25,000 people. Another 18% service between 25,000 and 50,000 constituents. Twenty-nine percent report their communities have more than 100,000 people.

Close to half, 49%, are single, independent or standalone libraries, while another 12% are single facilities that are part of a larger multi-branch system. About 27% of respondents are reporting for entire library systems with multiple branches and facilities. Another 10% did not answer for this category because they were unable to report budget figures.

Geographically, the largest segment, 28%, came from the Midwest, and 23% from the Southeastern United States. Another 22% represented libraries in the Western states, and 20% in the Northeast. Seven percent of respondents are in Canadian provinces, primarily Alberta and Ontario.

Key findings from the survey include the following:

- Overall, libraries have seen gains in their total budgets. But this is not helping them keep up with the costs of staffing, operations, and equipment. As was the case last year, most libraries continue to be forced to cut expenses, including staff training, hours, and print subscriptions. Areas seeing spending increases include ebook and digital collections acquisitions.
- There is a growing shift to digital offerings among public libraries. Libraries increasingly are fulfilling roles as technology hubs for their communities, with high demand for technology and career development training resources. Ebooks and other digital materials are on the rise, while print is being scaled back. More libraries are turning to the cloud to support operations or provide content.
- The recent economic downturn may be a temporary malady, but libraries recognize the shift to digital resources as a long-term trend that is changing the nature of their mission and services. Over the past year, attention has shifted from surviving the economic storm to delivering greater customer service, richer and more targeted resources to constituencies.

One respondent sums up the various challenges that public libraries expect to face in the coming years. "Customers want up-to-date materials, access to computers with Internet, wireless access, study and meeting space, pre- and early literacy training, relevant informational and cultural programs, easy access to needed information," says the director of a community library in Pennsylvania. "Our goal is to provide as much as of these and other services as our budget allows. Staying open 65 hours per week, 340-plus days per year is a core service that we will strive to maintain."

Another respondent explains the dual challenges public libraries face: "We need to evolve to find relevance for our brick-and-mortar facilities as well as our web services," says the senior manager of a large system in North Carolina. "This, in my opinion, is less an issue of funding support, and more an issue of administration support—realizing that existing resources can and should be reallocated to meet the growing electronic expectations of our members. The old library is gone, and it's not coming back. We need to move forward."

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

Overall, libraries have seen gains in their total budgets. But this is not helping them keep up with the costs of staffing, operations, and equipment. As was the case last year, most libraries continue to be forced to cut expenses, including staff training, hours, and print subscriptions. Areas seeing spending increases include ebook and digital collections acquisitions.

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, 76% had a significant level of budget authority, and 15% influenced or made recommendations about library expenditures. (See Figure 1.)

Overall, there has been an uptick in available funding for libraries across the spectrum. When asked for general budget ranges, a total of 47% report having annual budgets exceeding $1 million, up from 44% a year ago. At the high end, the percentage reporting annual budgets exceeding $5 million held steady, at about 18% of respondents. At the lower end of the spectrum, the percentage of public libraries with budgets of $500,000 or less also held steady, at 36%. (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 libraries, 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 public libraries and those that are part of a multi-branch system is about $880,000 a year. This is up 18% from the average reported in last year's survey. For respondents reporting for entire systems, which encompass multiple branches or facilities, the average reported budget in this survey is $11.9 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.])

Public library budgets vary greatly in terms of sizes of the populations they serve. Those libraries serving communities with more than 100,000 residents or constituents report average annual budgets of about $12.8 million. By contrast, libraries in smaller communities of 25,000 to 100,000 residents have budgets of about $1.6 million. Among communities with 10,000 to 25,000 residents, budgets average about $760,000. The smallest areas in the survey—serving fewer than 10,000 residents—have public library budgets averaging $183,000 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. Looking at the percentage of respondents reporting budget changes, those seeing rising budgets actually slipped from that seen in last year's survey, though respondents are more optimistic for the year ahead. About 34% of public library managers report increased budgets for the most recent fiscal year (2010-11), down from 37% a year ago. (See Figure 5.)

When asked about budgets for the fiscal year ahead, respondents are more likely to expect increased funding. It's also likely that fewer libraries will be seeing budget decreases in the year ahead—30%, down from 41% for the most recent year—suggesting that the worst is over economically.

Most of the increased funding appears to be going to smaller libraries, however. Close to half of the libraries serving medium to small populations report increased funding over the past year, compared to only 18% of the largest public libraries in the survey. The same expectations continue through the year ahead. (See Figure 6.)

Much of the funding streaming into libraries is helping to maintain staffing levels. In terms of where funding is being directed, respondents report that personnel and staffing consume three-fifths of their annual budgets, up from 55% a year ago. The proportion dedicated to operations and facilities is about the same. However, there has been some slippage in the proportion of funding for content acquisition, collection development, and equipment purchases. (See Figure 7.)

While this distribution of funds is fairly consistent across all sizes of libraries, smaller libraries report a slightly higher proportion of their funds dedicated to ongoing operations. (See Figure 8.)

As shown throughout this survey report, the pace of library migrations to digital formats has accelerated over the past year since the previous LRG survey was conducted. However, when it comes to allocating budget resources, print continues to dominate library budgets. In terms of content acquisition, most funding

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continues to go to printed books and other printed materials. Sixty-one cents on every dollar is dedicated to print materials, about the same as in the last survey. As the survey will show, there is enormous interest and preparation for ebooks. However, ebooks actually take up very little of public library budgets so far—only three cents on every dollar. (See Figure 9.)

Smaller libraries in the survey are more likely still be spending more than their larger counterparts on traditional print materials, the survey shows. At the same time, the largest libraries are devoting a larger share of their budgets to ebook purchases. (See Figure 10.)

Actions to contain budget shortfalls were on the upswing over the past year, the survey shows. Eighty-eight percent of respondents have taken some type of action to address budget shortfalls. Travel and conference budgets took the biggest hits, cited by 48% and up eight percentage points from the LRG survey a year ago. Subscriptions also continued to be scrutinized, with 46% of respondents citing cuts in this area, up from 39% a year ago. Salary freezes were also more prevalent, up from 43% to 46%. In addition, there has been an upswing in the adoption of consortia for shared resources (up from 12% to 19%), as well as a greater movement to online materials as a way to cut costs (from 14% to 18%). Staffing cutbacks continued on the upswing as well, with 29% paring down the number of hours worked—up from 25% a year ago. (See Figure 11.)

By size segments, larger libraries were more likely to be reporting the deepest cuts. This may be the result of simply having more to cut, compared to small community libraries that have been already operating as lean as possible. For example, 66% of managers at the largest libraries (serving communities of 100,000 or more) report they had to cut or eliminate travel or training budgets. By comparison, 59% of mid-size libraries and 41% of smaller libraries made such cuts over the past year. Only 27% of the smallest community libraries (serving populations of fewer than 10,000 people) report cuts in this area. Likewise, the largest libraries were more likely than their smaller counterparts to report cuts in spending on print subscriptions (54%) and salary freezes (54%). Close to half, 49%, of the largest libraries experienced layoffs or cuts in staff hours, versus only 10% of their smallest counterparts. Even online subscriptions took a greater hit at the largest libraries—43% made cuts in this area, versus only 5% of the smallest community libraries. (See Figure 12.)

As noted above, there has been an overall rise in the actual sizes of public library budgets across the board, and, as a result, there are areas that are seeing ramp-ups in spending. A majority of respondents, 73% report having areas with increased spending, up from 61% a year ago.

All spending increases are going to technology-based offerings. Most notably, there has been a significant surge in acquisitions of ebooks by public libraries over the past year. A total of 52% of respondents report that they have increased spending on ebooks, up from 18% just one year ago. Also up sharply is spending on digital content collections and services, rising from 9% to 17% of respondents. Modest increases were also seen in technology equipment and software (from 16% to 19%) and IT services (8% to 11%). (See Figure 13.)

"Patrons will want more content for their tablets and smart phones," says the librarian of a mid-size library in Connecticut. "Ebooks, audiobooks, and ways to access our catalog and calendar. At the moment we are not receiving enough funding to meet this demand. But here's hoping the future looks brighter."

Across the various sizes of public libraries, spending on ebooks surged the most among the largest institutions. More than two-thirds of libraries serving populations of more than 100,000 constituents ramped up their ebook acquisitions, compared to 27% of the smallest community libraries. Increases in personnel and staffing expenses were stronger among smaller libraries in the study. Between 27% and 30% of libraries serving areas with fewer than 25,000 people spent more on personnel over the past year, versus 25% of the largest institutions. (See Figure 14.)

Overall, most public libraries covered in the survey receive funding from local public funding sources, and reliance has grown modestly over the past year. State funding declined from 46% to 41% of libraries. There has been an increase in reliance on fee-based services as well, rising from 9% of libraries to 14%. Income streams from gifts, grants and endowments have remained steady. (See Figure 15.)

During 2011, state and local governments saw the final portions of federal stimulus funding intended to pick up the economy from the most recent recession. Close to half of the libraries in this survey, 48%, report they felt at least some impact in their budgets as a result of the withdrawal of this stimulus spending. More than one-fourth, 27%, say their libraries' operations or special programs were severely impacted by the withdrawal of stimulus funds. (See Figure 16.)

Patron demand is growing for electronic formats, including ebooks, internet, media streaming, and audio downloads, but smaller libraries are also caught in a tight squeeze. "We're not receiving enough funding to help support these trends," one respondent, director of a mid-size Texas library laments. "Just to be a member of an ebooks consortium costs $6,000 a year. Our whole budget for books for the whole collection is only $19,000. Unfortunately, that's too much to take out of that line item for a few select patrons."

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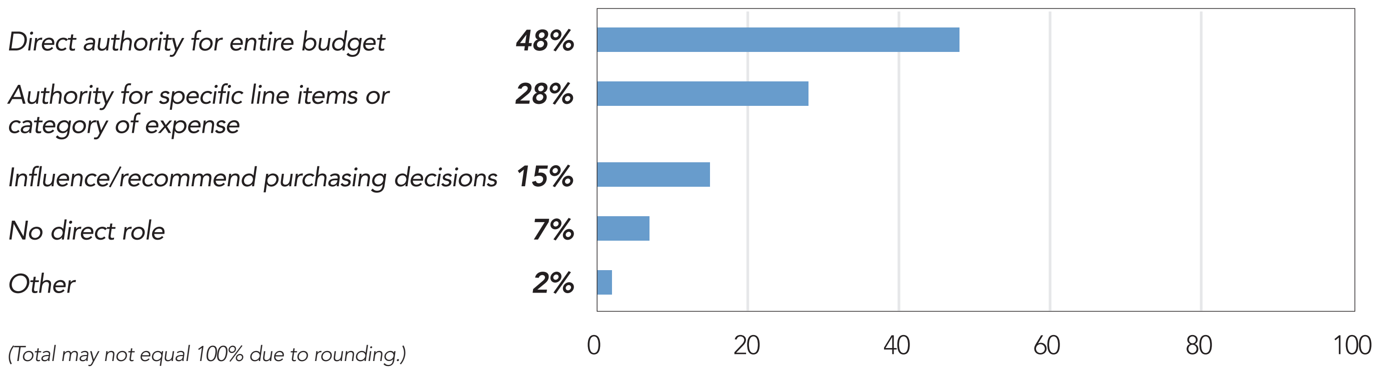
Figure 1: Respondents' Roles in Managing Public Library Budgets



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

Figure 2: Annual Public Library Budget Ranges

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

	2011	2012
Less than $100,000	—	***11%***
$100,000 to $500,000	***36%****	***25%***
$500,000 to $1,000,000	***17%***	***11%***
$1 million to $3 million	***21%***	***23%***
$3 million to $5 million	***6%***	***6%***
More than $5 million	***17%***	***18%***
Don't know/unsure	***4%***	***5%***

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

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

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Figure 3: Public Library Budgets—By Library Structure

	2011	2012
Single independent pubic libraries	***$744,974***	***$879,090***
Single library with/in multibranch, multi-location system	*	***$881,070***
Public library system with multiple branches/facilities	*	***$11,857,015***

**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: Public Library Budges—By Population Size Served

Fewer than 10,000	***$183,365***
10,000-25,000	***$758,454***
25,000-100,000	***$1,640,237***
Greater than 100,000	***$12,788,614***

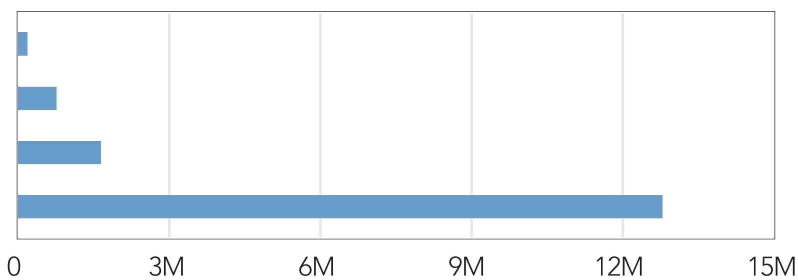

Figure 5: Changes in Public Library Budgets

	2009–2010	2010–2011	2011–2012 (PROJECTED)
Increase	***37%***	***34%***	***38%***
No change	***18%***	***22%***	***21%***
Decrease	***43%***	***41%***	***30%***
Don't know/unsure	***2%***	***3%***	***9%***

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

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

	<10K	10K–25K	25K–100K	>100K
Increase 2010–2011	**38%**	**48%**	**36%**	**18%**
Increase 2011–2012 (projected)	**45%**	**48%**	**42%**	**20%**

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

Figure 7: Allocation of Overall Public Library Budgets

	2011	2012
Personnel/staffing	**55%**	**60%**
Operations/facilities	**17%**	**16%**
Content acquisitions/collection development	**16%**	**13%**
Library systems, computers, A/V, media equipment, software/svcs	**7%**	**6%**
Other	**4%**	**4%**

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

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Figure 8: Allocation of Overall Public Library Budgets —By Population Size Served

	<10K	10K–25K	25K–100K	>100K
Personnel/staffing	***57%***	***62%***	***61%***	***62%***
Operations/facilities	***21%***	***16%***	***13%***	***16%***
Content acquisitions/collection development	***13%***	***12%***	***15%***	***12%***
Library systems, computers, A/V,media equipment, software/svcs	***6%***	***6%***	***7%***	***6%***
Other	***3%***	***5%***	***5%***	***4%***

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

Figure 9: Allocation of Public Library Content Acquisitions Budgets

	2011	2012
Printed books & other printed materials	***61%***	***61%***
Media titles (video, audio, computer-based modules, etc.)	***16%***	***16%***
Serials/periodicals (print)	***9%***	***8%***
Online databases, digital content collections	***7%***	***7%***
Ebooks	***1%***	***3%***
Special programs	***2%***	***1%***
Other (microforms, manuscripts, archives, preservation, etc.)	***2%***	***1%***
All other categories	***2%***	***1%***

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

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

	<10K	10K–25K	25K–100K	>100K
Printed books & other printed materials	***69%***	***59%***	***61%***	***54%***
Media titles (video, audio, computer-based modules, games, etc.)	***15%***	***18%***	***15%***	***18%***
Serials/Periodicals (print)	***9%***	***8%***	***8%***	***7%***
Online databases, digital content collections	***3%***	***3%***	***10%***	***12%***
Ebooks	***1%***	***4%***	***2%***	***7%***
Special programs	***2%***	***1%***	***1%***	***1%***
Other (microforms, manuscripts, archives, preservation, etc.	***0.5%***	***3%***	***1%***	***1%***
All other categories	***1%***	***5%***	***1%***	***1%***

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

	2011	2012
Cut or eliminated conference/travel/education budget	**40%**	**48%**
Cut spending on print subscriptions	**39%**	**46%**
Salary freezes	**43%**	**46%**
Applied for more grants	**38%**	**42%**
Reduced programming	**29%**	**31%**
Staff layoffs/staff hours cut	**25%**	**29%**
Added volunteers	**28%**	**28%**
Reduced library hours	**23%**	**25%**
Cut spending on online subscriptions	**27%**	
Re-negotiated contracts with vendors	**18%**	**21%**
Collaborated/shared with other libraries/Joined consortia	**12%**	**19%**
Lobbied for more funding from institutions	**17%**	**19%**
Moved more services/materials online	**14%**	**18%**
Consolidated of departments	**11%**	**17%**
Reduced IT expenditures	**18%**	**12%**
Closed facilities	**1%**	**3%**
Don't know/unsure	**2%**	**1%**
Other	**9%**	**7%**
No cuts/budget freezes over past year	**23%**	**21%**

(Multiple responses permitted.)

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

	<10K	10K–25K	25K–100K	>100K
Cut or eliminated conference/travel/education budget	***27%***	***41%***	***59%***	***66%***
Cut spending on print subscriptions	***35%***	***41%***	***53%***	***54%***
Salary freezes	***45%***	***41%***	***44%***	***54%***
Applied for more grants	***40%***	***30%***	***41%***	***54%***
Reduced programming	***25%***	***19%***	***41%***	***37%***
Staff layoffs/staff hours cut	***10%***	***22%***	***38%***	***49%***
Added volunteers	***20%***	***22%***	***26%***	***43%***
Re-negotiated contracts with vendors	***2%***	***15%***	***29%***	***40%***
Reduced library hours	***10%***	***30%***	***38%***	***26%***
Collaborated/shared with other libraries/ joined consortia	***12%***	***19%***	***18%***	***29%***
Lobbied for more funding from institutions	***22%***	***19%***	***15%***	***20%***
Moved more services/materials online	***5%***	***19%***	***18%***	***31%***
Consolidated departments	***5%***	***0%***	***15%***	***46%***
Cut spending on online subscriptions	***5%***	***15%***	***47%***	***43%***
Reduced IT expenditures	***12%***	***7%***	***18%***	***11%***
Closed facilities	***0%***	***0%***	***0%***	***11%***
Don't know/unsure	***5%***	***0%***	***0%***	***0%***
Other	***2%***	***7%***	***11%***	***8%***
No cuts/budget freezes over past year	***30%***	***30%***	***18%***	***6%***

(Multiple responses permitted.)

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

	2011	2012
Ebooks	*18%*	*52%*
Personnel	*25%*	*25%*
Library technology equipment, software	*16%*	*19%*
Digital content collections/services	*9%*	*17%*
Book acquisitions	*12%*	*12%*
IT services	*8%*	*11%*
Facilities upgrades/maintenance	*14%*	*9%*
Online subscription acquisitions	*10%*	*9%*
Operations	*11%*	*9%*
Library hours/availability	*8%*	*4%*
Periodicals/serials acquisitions	*4%*	*3%*
Cloud-based solutions	*1%*	*3%*
Multimedia/streaming media	*3%*	*2%*
Don't know/unsure	*5%*	*2%*
Other	*7%*	*3%*
Print subscription acquisitions	—	*2%*
No areas seeing increased spending/support	*34%*	*25%*

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

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

	<10K	10K–25K	25K–100K	>100K	TOTAL
Ebooks	***27%***	***58%***	***60%***	***67%***	***52%***
Personnel	***27%***	***30%***	***31%***	***13%***	***25%***
Library technology equipment, software	***19%***	***31%***	***14%***	***13%***	***19%***
Digital content collections/services	***8%***	***19%***	***17%***	***27%***	***17%***
Book acquisitions	***14%***	***12%***	***17%***	***7%***	***12%***
IT services	***11%***	***15%***	***3%***	***17%***	***11%***
Facilities upgrades/maintenance	***5%***	***8%***	***11%***	***10%***	***9%***
Online subscription acquisitions	***0%***	***4%***	***14%***	***17%***	***9%***
Operations	***16%***	***4%***	***6%***	***7%***	***9%***
Library hours/availability	***8%***	***4%***	***3%***	***0%***	***4%***
Periodicals/serials acquisitions	***5%***	***4%***	***0%***	***3%***	***3%***
Cloud-based solutions	***0%***	***0%***	***3%***	***10%***	***3%***
Multimedia/streaming media	***0%***	***0%***	***3%***	***7%***	***2%***
Don't know/unsure	***3%***	***4%***	***3%***	***0%***	***2%***
Other	***8%***	***3%***	***0%***	***3%***	***3%***
Print subscription acquisitions	***3%***	***4%***	***0%***	***0%***	***2%***
No areas seeing increased spending/ support	***30%***	***31%***	***17%***	***23%***	***25%***

(Multiple responses permitted.)

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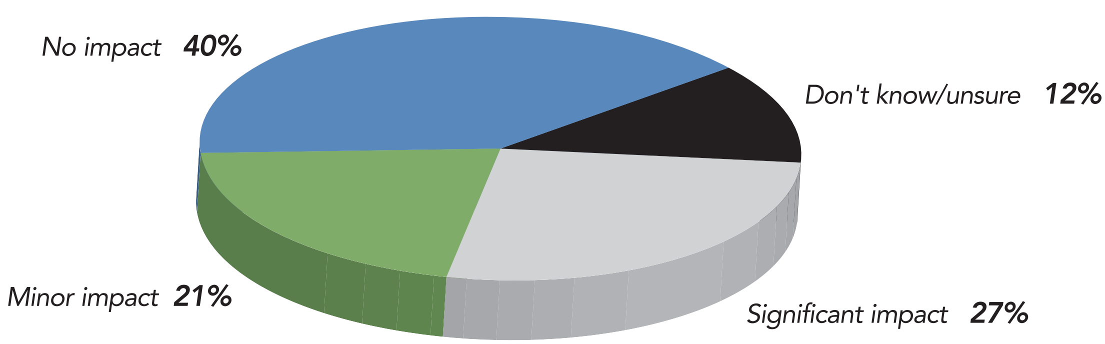
Figure 15: Primary Sources of Public Library Funding

	2011	2012
Public funding—local	92%	96%
Public funding—state	46%	41%
Gifts and donations	44%	43%
Grants	41%	38%
Special fundraising events	16%	18%
Fee-based services	9%	14%
Endowments	11%	12%
Public funding—federal	10%	9%
Corporate funding	1%	7%
IT fees	—	2%
Don't know/unsure	1%	0%
Other	8%	7%

(Multiple responses permitted.)

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



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RISE OF THE DIGITAL PUBLIC LIBRARY

There is a growing shift to digital offerings among public libraries. Libraries increasingly are fulfilling roles as technology hubs for their communities, with high demand for technology and career development training resources. Ebooks and other digital materials are on the rise, while print is being scaled back. More libraries are turning to the cloud to support operations or provide content.

The shift to the digital library has accelerated noticeably since the last survey just a year ago. Close to three-fourths of respondents, 71%, report that demand for their libraries' electronic offerings have increased over the past year. In contrast, 42% report increased demand for print resources. Print demand as well is off from a year ago, when it was comparable with ebook demand at 67%. (See Figure 17.)

Demand for ebooks from libraries is also soaring. More than fourth-fifths of respondents, 81%, say they are seeing rising demand from patrons for ebook access, up from 43% a year ago. There has also been a surge in demand for streaming media resources through libraries, rising from 11% to 21% of respondents. While demand is off from a year ago, libraries continue to serve as community hot spots and job-search or career development resource centers. Four-fifths say their patrons seek wireless connectivity at their facilities, and close to 70% seek computer time or web access. More than two-thirds of respondents report that patrons come to their libraries for assistance with their career plans. These rising trends in patron requirements point to the evolving role of public libraries as hubs for providing assistance in preparing people for today's fast-evolving digital economy. (See Figure 18.)

Demand for various services is fairly consistent across the various sizes of public libraries covered in the survey. Demand for ebooks is high, but stands out among libraries with 25,000 or more constituents. (See Figure 19.)

"Demand for e-resources and other digital resources is in high demand, as are tools for independent learning, and job searching, especially in the tech industry and health information," says the director of a California library system. "As digital resources overtake print resources our facilities will need to be repurposed as interactive, independent, and group learning spaces."

Providing technical expertise and assistance to patrons is a challenge within itself, however. "Our patrons are requesting how-to classes on using ereaders (Kindle, Nook, etc)," says a library administrator in Arkansas. "We do not have the staff expertise at this time to provide these services. It would be wonderful to bring in a consultant, but there are no monies in our budget for that. We would have to rely on a donation."

Still, many librarians find there is still demand for print. "We believe users will demand more electronic services yet we have to serve those without the means to access these," says one respondent, vice president of a large library system in Illinois. "As always, it's a struggle to provide for the haves, the have-nots and the middle of the road—especially with format changes."

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, 35% of respondents report that more than 10% of their acquisitions budgets are spent on electronic resources, up from 24% in the previous survey. No public library has reached the point were a majority of their acquisitions dollars go to electronic resources, however. (See Figure 20.) There is also more of a tendency among the largest libraries in the survey (serving areas with more than 100,000 people). (See Figure 21.)

Keeping up with technology requires financial resources not available to many libraries. "I see the almost total abandonment of actual book reading in our area, except for the older patrons," says the director of a public library in Illinois. "The younger patrons want to get on computers, visit their social network, play games, listen to music, and very occasionally research for homework. Our computers are dated, and I'm just trying to keep them up and running for those who do come in. If it weren't for donated computers from our area Wal-Mart distributor, we'd have no models newer than 2001."

More than two-fifths of public libraries, 42%, 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 33% reporting such increases in the survey a year ago. However, respondents are cautious about their spending in this area over the year ahead, with 34% anticipating increased spending on IT solutions. (See Figure 22.)

Interestingly, the greatest boosts in technology spending over the past year occurred among the smallest libraries (serving communities wit h fewer than 10,000 people) and largest institutions (more than 100,000). For the year ahead, the larger facilities are more likely to be ramping up spending. (See Figure 23.)

Spending on online subscriptions at public libraries is also up moderately over the past year, rising from 18% to 22%. This will remain consistent over the coming year as well. Only 13% indicated they were cutting back on such spending, and only 7% foresee a drop in online subscription budgets in the year ahead. (See Figure 24.)

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The most pronounced growth in online subscription spending is taking place among the larger libraries in the survey—the largest facilities are twice as likely as the smallest community libraries to be increasing their funding of these services, 26% versus 13%. (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. One-third of libraries in the LRG survey, 33%, are either already using or planning to use cloud computing at their libraries, up from 16% last year. Close to one-tenth of public library managers report they currently have cloud projects underway, double from a year ago. (See Figure 26.)

The most widespread use of cloud is taking place among the larger library segments covered in the survey. Half of the libraries serving the largest populations report they are either using or planning to use cloud-based resources, compared to 22% of the smallest institutions in the survey. (See Figure 27.)

There has been a notable upswing in adoption of cloud for both communication functions (such as web conferencing, video, podcasting, email and collaboration), as well as basic IT infrastructure requirements (such as online storage or processing). More than one-third of respondents are either using or planning to use cloud applications for interactive communications needs, more than double the 15% reporting a year ago. In addition, 29% are employing or planning to employ cloud-based infrastructure services, up from 12% a year ago. (See Figure 28.)

When looking at the various information technology tools and platforms being adopted within public libraries, there has been a significant rise in ebook readers reported. More than a third of public libraries, 36%, now support ebook readers, more than double the percentage in last year's survey. Online library catalogs or OPACS are near ubiquitous. There has also been a surge in adoption of Integrated Library Systems (ILSs), systems employed to order and acquire, receive and invoice, catalog, circulate, track, and shelve materials, jumping from 77% to 87%. There is also greater adoption of hardware such as PCs, laptops, or other devices loaned to patrons for internet access. Another 22% of respondents also support audio or video teleconferencing services, up from 16%. (See Figure 29.)

When looking at technology platform adoption across public library size categories, the explosion of ebook readers and Web access tools is even more dramatic among larger facilities. For example, a majority of the libraries serving the largest populations (100,000 or more) now support ebook readers, while the smallest libraries are just barely getting started with them (54% versus 18%). Radio frequency identification (RFID) devices have also gained ground in the largest libraries, with 44% of these institutions employing the technology not only for theft detection systems, but also to enable more efficient tracking of materials throughout the library, including easier and faster charge and discharge, inventorying, and materials handling. Only 14% to 18% of libraries with smaller populations have adopted these devices. (See Figure 30.)

"The demand will come in newly emerging technology," says the director for an Iowa community library. "To access most of this technology requires a library to be automated. This is where the biggest cost is. The start-up and yearly maintenance fees are quite formidable for a library of our size. The funding for start-up isn't as big a problem as the yearly maintenance fee. We are looking into getting an endowment started to prepare for this future endeavor."

Ebooks also dominate the purchasing plans of public libraries going forward. Close to half of the public libraries in the survey, 46%, plan to purchase ebook readers, making this the top purchasing priority in the year ahead. This is up from last year's survey, in which 31% indicated they planned to purchase the readers. Also jumping ahead are PCs, kiosks, and laptops, with purchasing plans for end user access hardware rising from 35% to 41% over the past year. Plans for local area or wireless network equipment purchases are down somewhat, suggesting this market is saturated. (See Figure 31.)

"We have seen an increase in ebook checkouts and anticipate that to be an area of extreme growth," says the director of a Minnesota-based library. "It will be interesting to see if we need to shift money from print materials to ebooks to cover the demand or if at some point it will stabilize." Another concurred with this challenge. "We are seeing a high demand for ebookss greater than we can provide," the respondent, director of a library on Ohio, explained. "We are having to reduce the adult print budget to purchase ebooks through Overdrive. We need more money to be able to meet demands for both print and ebookss. Need to be able to integrate all ebook vendors products in a single ILS run by SEO consortium, right now its just Overdrive. Would like to purchase content and use any ereader device such as Kindle books on Sony reader or Kobo reader."

Public libraries' adoption of social media platforms or services are mixed. Efforts to tap into popular social networking sites such as Facebook and LinkedIn dominate this space, with two-thirds of respondents indicating their libraries are engaging patrons through social networking. This is up modestly from a year ago. There has also been a moderate uptick in engaging patrons and soliciting feedback via online reviews and ratings—rising from 36% to 40% pf public libraries. Support of photo or video-sharing web apps is up, from 14% to 24% of libraries. However, there has been a decrease in the employment of wikis or blogs as part of engaging patrons, from 38% a year ago to 30% at the current time. (See Figure 32.)

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Data collection and analysis performed with SurveyMethods.

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

	ELECTRONIC		PRINT	
	2011	2012	2011	2012
Increase	**67%**	**71%**	**67%**	**42%**
No change	**15%**	**10%**	**10%**	**19%**
Decrease	**3%**	**2%**	**14%**	**29%**
Don't know/unsure	**15%**	**16%**	**9%**	**9%**

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

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

	2011	2012
Wireless access	**84%**	**83%**
Ebooks	**43%**	**81%**
Computer/web access	**77%**	**69%**
Job search/career development information	**76%**	**68%**
Audiobooks	**64%**	**55%**
Technical information/training	**41%**	**35%**
Computer games/simulations	**26%**	**25%**
Streaming media	**11%**	**21%**
Primary and continuing education programs/requirements	**21%**	**19%**
English language instruction	**22%**	**14%**
Medical	**12%**	**11%**
Don't know/unsure	**3%**	**3%**
Other	**3%**	**0%**

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

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

	<10K	10K–25K	25K–100K	>100K
Wireless access	*75%*	*94%*	*87%*	*80%*
Ebooks	*63%*	*91%*	*82%*	*90%*
Computer/web access	*72%*	*69%*	*69%*	*66%*
Job search/career developmentinformation	*70%*	*66%*	*62%*	*76%*
Audiobooks	*50%*	*59%*	*51%*	*56%*
Technical information/training	*22%*	*41%*	*36%*	*41%*
Computer games/simulations	*27%*	*25%*	*23%*	*24%*
Streaming media	*10%*	*31%*	*18%*	*11%*
Primary and continuing education programs/requirements	*17%*	*19%*	*21%*	*22%*
English language instruction	*5%*	*16%*	*21%*	*17%*
Medical	*10%*	*16%*	*10%*	*10%*
Don't know/unsure	*5%*	*6%*	*0%*	*2%*
Other	*0%*	*0%*	*2%*	*0%*

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

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

	2011	2012
Less than 10%	***57%***	***53%***
11% to 25%	***22%***	***30%***
26% to 50%	***2%***	***5%***
More than 50%	***0%***	***0%***
Don't know/unsure	***18%***	***12%***

(Multiple responses permitted.)

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

	<10K	10K–25K	25K–100K	>100K
Less than 10%	***74%***	***61%***	***47%***	***32%***
11% to 25%	***18%***	***23%***	***39%***	***42%***
26% to 50%	***0%***	***3%***	***0%***	***16%***
51% to 75%	***0%***	***0%***	***0%***	***0%***
76% to 99%	***0%***	***0%***	***0%***	***0%***
100%	***0%***	***0%***	***0%***	***0%***
Don't know/unsure	***8%***	***13%***	***13%***	***11%***

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

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

(Not including online subscriptions)	2009–10	2010–11	2011–12 (PROJECTED)
Increase	***33%***	***42%***	***34%***
No change	***33%***	***31%***	***37%***
Decrease	***12%***	***11%***	***13%***
Don't know/unsure	***22%***	***16%***	***16%***

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

	<10K	10K–25K	25K–100K	>100K
Increased 2010–2011	***46%***	***33%***	***40%***	***54%***
Increased 2011–2012 (projected)	***28%***	***28%***	***40%***	***39%***

Figure 24: Changes in Public Library Spending on Online Subscriptions

	2009–10	2010–11	2011–12 (PROJECTED)
Increase	***18%***	***22%***	***22%***
No change	***43%***	***53%***	***56%***
Decrease	***21%***	***13%***	***7%***
Don't know/unsure	***18%***	***13%***	***14%***

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

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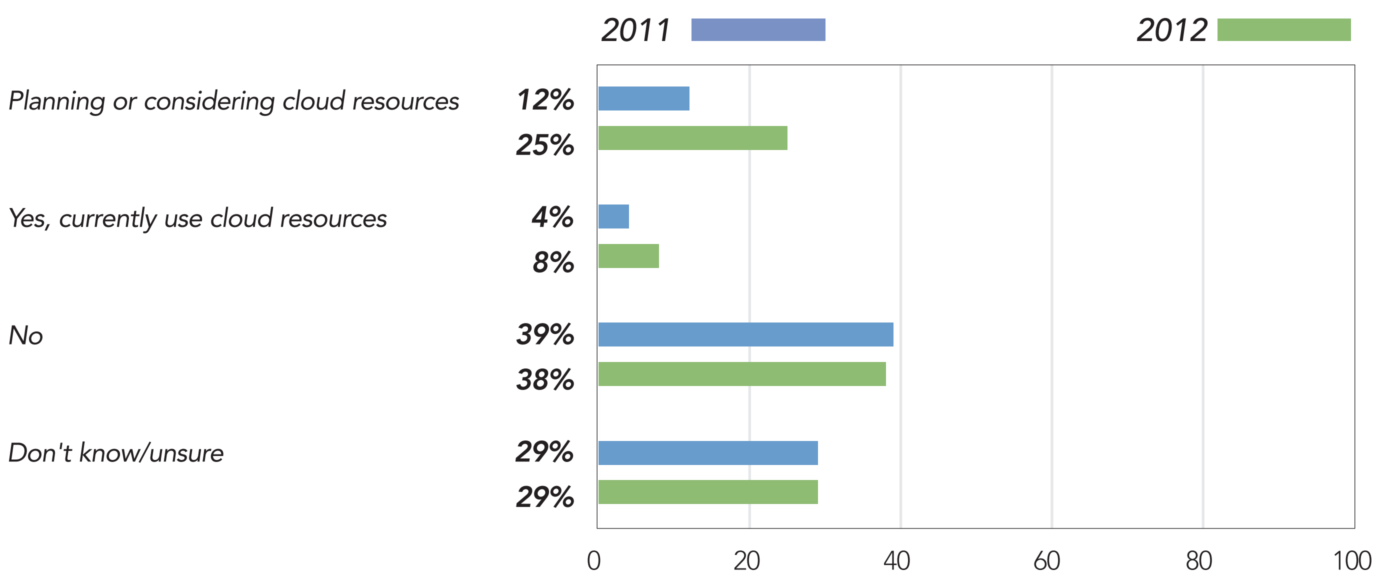
Data collection and analysis performed with SurveyMethods.

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

	<10K	10K–25K	25K–100K	>100K
Increased 2010–2011	***13%***	***16%***	***32%***	***26%***
Increased 2011–2012 (projected)	***14%***	***22%***	***24%***	***35%***

Figure 26: Access Cloud Computing Resources?



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Data collection and analysis performed with SurveyMethods.

Figure 27: Access Cloud Computing Resources —By Population Size Served

	<10K	10K–25K	25K–100K	>100K
Yes, currently use cloud resources	***7%***	***0%***	***5%***	***18%***
Planning or considering cloud resources	***15%***	***19%***	***37%***	***32%***
No	***50%***	***48%***	***37%***	***18%***
Don't know/unsure	***27%***	***32%***	***21%***	***32%***

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

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

	2011	2012
Communications (web conferencing, video, podcasting, email, collaboration)	***15%***	***35%***
IT infrastructure (online storage, processing)	***12%***	***29%***
Specialized business applications (business, management, marketing, market research)	***8%***	***9%***
Don't know/not sure	***76%***	***55%***
Other	***3%***	***5%***

(Multiple responses permitted.)

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

	2011	2012
Online library catalog/OPAC	**93%**	**95%**
Integrated Library System (ILS)	**77%**	**87%**
LAN/WAN/wireless network	**87%**	**85%**
Intranet/extranet/website	**64%**	**73%**
PCs/kiosks/laptops/mobile devices	**67%**	**74%**
Web-based (IM or email) reference service	**45%**	**46%**
Ebook readers	**17%**	**36%**
RFID check-in/check-out, inventory control	**20%**	**24%**
Authentication solutions	**14%**	**23%**
Audio/video teleconferencing	**16%**	**22%**
Electronic Resource Management Systems	**10%**	**7%**
Link resolvers	**4%**	**7%**
Discovery services	**4%**	**4%**
Other	**2%**	**1%**

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 30: Current Information Technology Tools and Platforms Used Within Public Libraries—By Population Size Served

	<10K	10K–25K	25K–100K	>100K
Online library catalog/OPAC	**92%**	**97%**	**100%**	**92%**
Integrated Library System (ILS)	**74%**	**93%**	**92%**	**95%**
LAN/WAN/wireless network	**74%**	**90%**	**92%**	**90%**
Intranet/extranet/website	**64%**	**69%**	**68%**	**90%**
PCs/kiosks/laptops/mobile devices	**67%**	**66%**	**73%**	**90%**
Web-based (IM or email) reference service	**28%**	**28%**	**54%**	**69%**
Ebook readers	**18%**	**31%**	**38%**	**54%**
Authentication solutions	**3%**	**24%**	**22%**	**44%**
Audio/video teleconferencing	**18%**	**24%**	**22%**	**26%**
Electronic Resource Management Systems	**0%**	**7%**	**8%**	**13%**
RFID check-in/check-out, inventory control	**18%**	**14%**	**16%**	**44%**
Link resolvers	**3%**	**3%**	**5%**	**15%**
Discovery services	**0%**	**0%**	**3%**	**13%**
Other	**2%**	**3%**	**0%**	**0%**

(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 Public Libraries in 2012

	2011	2012
Ebook readers	***31%***	***46%***
PCs/kiosks/laptops/mobile devices	***35%***	***41%***
Online library catalog/OPAC	***20%***	***22%***
Integrated Library System (ILS)	***18%***	***22%***
RFID check-in/check-out, inventory control	***13%***	***15%***
Intranet/extranet/website	***15%***	***13%***
LAN/WAN/wireless network	***16%***	***13%***
Audio/video teleconferencing	***10%***	***12%***
Web-based (IM or email) reference service	***7%***	***6%***
Authentication solutions	***5%***	***5%***
Discovery services	***3%***	***3%***
Electronic resource management systems	***5%***	***2%***
Link resolvers	***3%***	***1%***
Other	***1%***	***11%***

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 32: Social Networking Services in Use at Public Libraries

	2011	2012
Social networking (e.g., Facebook, LinkedIn)	***62%***	***66%***
Patron reviews, ratings	***36%***	***40%***
Wikis or blogs	***38%***	***30%***
Photo or video-sharing web apps	***14%***	***24%***
Audio or video podcasts	***18%***	***15%***
Document-sharing web apps	***12%***	***14%***
Sharing library web pages and subject guides (e.g., LibGuides)	***11%***	***11%***
We don't offer social networking tools/opportunities	***9%***	***10%***
Tagging and rating	***11%***	***8%***
Don't know/unsure	***23%***	***24%***
Other	***2%***	***0%***

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

STRATEGIES: LOOKING FORWARD OVER THE NEXT DECADE

The recent economic downturn may be a temporary malady, but libraries recognize the shift to digital resources as a long-term trend that is changing the nature of their mission and services. Over the past year, attention has shifted from surviving the economic storm to delivering greater customer service, and richer and more targeted resources to constituencies.

While digital dominates the agendas of most libraries this year, that is only one part of an increasing commitment to a customer service culture. When asked what their leading priorities would be over the coming year, 64% of respondents say they want to improve or expand their customer service. This is up from 59% a year ago, and may indicate that public library managers are emerging from the bunkers in which they sought shelter during the economic storm. As part of this renewed commitment, close to half of the respondents, 49%, also say they place a high priority on identifying and reaching out to new groups of patrons. This may include establishing new programs or services for young people, or for recent immigrants. In the last survey, 43% had such efforts underway. (See Figure 33.)

Technology is the key to today's digital library, of course, and this is reflected in other growing priorities. For example, 44% of respondents indicate they are pursuing a greater commitment to providing assistance and education on digital resources, up from 40%. Another 39% seek to increase the availability of online publications or digital access—up from 30% a year ago. Nevertheless, tight budgets do remain a challenge for a majority of public 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. Keeping up with fast-paced changes in the information technology world is a concern that is also keeping librarians awake at night, indicated by close to three-fourths of respondents, 73%, and up from 66% a year ago. Competing with resources that are readily available on the web is also growing as a challenge to today's library. Forty-five percent of respondents are concerned about their ability to deliver information or resources that can't be readily found on Google—up from 34% in the last year. (See Figure 34.)

These challenges, of course, are seen across all public libraries, regardless of size. Still, the experiences of libraries in small communities vary from their larger, more urban counterparts. For examples, tight budgets are a concern among the smallest facilities. The largest libraries, on the other hand, are more focused on migrating their print content to the digital realm, as well as finding and retaining knowledgeable staff. (See Figure 35.)

As public libraries seek to define their new roles in the midst of the cross-currents of lean finances and digital demand, close to half, 45%, are articulating their visions through strategic plans, similar to those followed by businesses and government agencies. This is about the same as last year. (See Figure 36.) By library size, a majority of the largest libraries, 54%, have such plans, though there is a great deal of consideration or development of such plans in even the smallest libraries in the survey. (See Figure 37.)

A common strategy for many libraries is to pool their resources and purchases from consortia and networks. Two-thirds of respondents, indicate they belong to one or two consortia, up from 60% last year. (See Figure 38.) Respondents also report greater levels of support from the consortia to which they belong. About 28% report increased support over the past year, up from 24% in last year's survey. (See Figure 39.)

Many librarians and library managers see their institutions as hubs that will help address the gap between unemployment and skills shortages among employers. "We anticipate the demand to increase in the area of technology training," says the director of a New York state community library. "The 'digital divide' often has patrons coming into the library that are unfamiliar with the technology that is now a backbone to our society. For instance, applying for the most entry level jobs requires basic computer skills that are still lacking in some segments of the population. This area is more directly affected by training than lack of funding."

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Data collection and analysis performed with SurveyMethods.

Figure 33: Public Libraries' Priorities for the Coming Year

	2011	2012
Improve/expand customer service	**59%**	**64%**
Identify and reach out to new groups of patrons	**43%**	**49%**
Provide assistance/education on inf. access tools/svcs	**40%**	**44%**
Increase availability of online pubs/digital access	**30%**	**39%**
Drive usage of current resources	**36%**	**38%**
Enhance discovery of collections	**34%**	**32%**
Repurpose physical space	**30%**	**31%**
Institute special programs for constituents/patrons	**27%**	**29%**
Physical expansion/upgrade of facilities	**22%**	**21%**
Join or increase participation in consortium/network	**14%**	**18%**
Develop unique library collections	**11%**	**16%**
Enhancing user workflow tools	**17%**	**5%**
Don't know/unsure	**4%**	**4%**
Other	**4%**	**4%**

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

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

	2011	2012
Maintaining services with tight budgets	87%	82%
Keeping up with changes in information technology	66%	73%
Identifying new sources of funding	54%	52%
Competing/keeping up with public online svcs/offerings	34%	45%
Keeping facilities open/at preferred operational levels	49%	43%
Finding and retaining knowledgeable staff	39%	38%
Migrating print content to digital formats	18%	23%
Other	4%	1%

(Multiple responses permitted.)

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Data collection and analysis performed with SurveyMethods.

Figure 35: Public Libraries' Challenges Over the Next 5 Years —By Population Size Served

	<10K	10K–25K	25K–100K	>100K	TOTAL
Maintaining services with tight budgets	*87%*	*81%*	*79%*	*80%*	*82%*
Keeping up with changes in information technology	*77%*	*69%*	*82%*	*61%*	*73%*
Identifying new sources of funding	*50%*	*56%*	*46%*	*59%*	*52%*
Competing/keeping up with public online svcs/offerings	*45%*	*56%*	*38%*	*41%*	*45%*
Keeping facilities open/at preferred operational levels	*37%*	*44%*	*44%*	*49%*	*43%*
Finding and retaining knowledgeable staff	*25%*	*37%*	*31%*	*56%*	*38%*
Migrating print content to digital formats	*15%*	*22%*	*21%*	*37%*	*23%*
Other	*5%*	*0%*	*0%*	*2%*	*1%*

(Multiple responses permitted.)

Figure 36: Public Library Have Strategic Plan?

	2011	2012
Yes	*46%*	*45%*
Under development	*22%*	*29%*
Under consideration	*15%*	*11%*
No	*10%*	*12%*
Don't know/unsure	*6%*	*3%*

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

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Data collection and analysis performed with SurveyMethods.

Figure 37: Public Library Have Strategic Plan —By Population Size Served

	<10K	10K–25K	25K–100K	>100K
Yes	***42%***	***37%***	***49%***	***54%***
Under development	***27%***	***31%***	***33%***	***24%***
Under consideration	***12%***	***16%***	***8%***	***7%***
No	***15%***	***12%***	***10%***	***10%***
Don't know/unsure	***2%***	***3%***	***0%***	***5%***

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

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

	2011	2012
None	***10%***	***11%***
One	***38%***	***42%***
Two	***22%***	***24%***
Three	***11%***	***7%***
Four	***2%***	***3%***
Five	***0%***	***0%***
More than 5	***1%***	***2%***
Don't know/unsure	***14%***	***11%***

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

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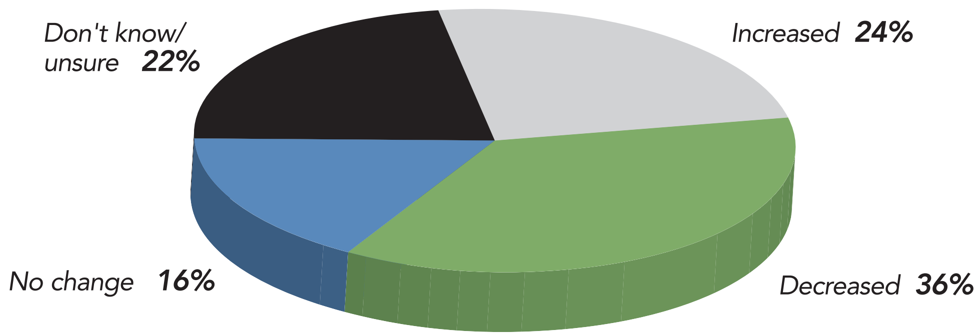
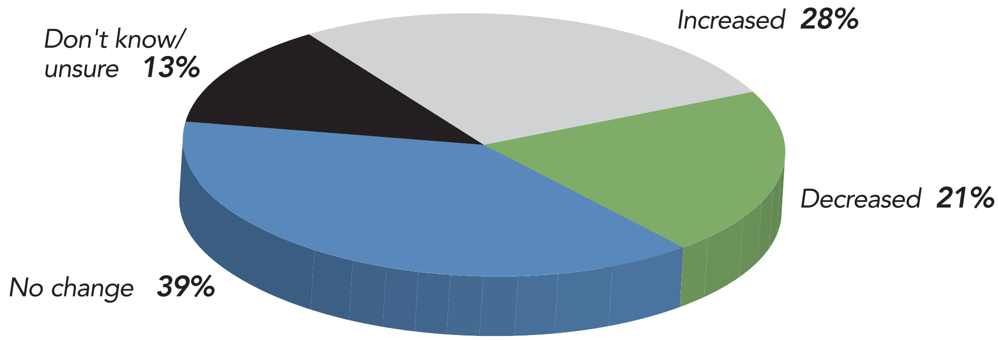
Data collection and analysis performed with SurveyMethods.

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

2011



2012



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

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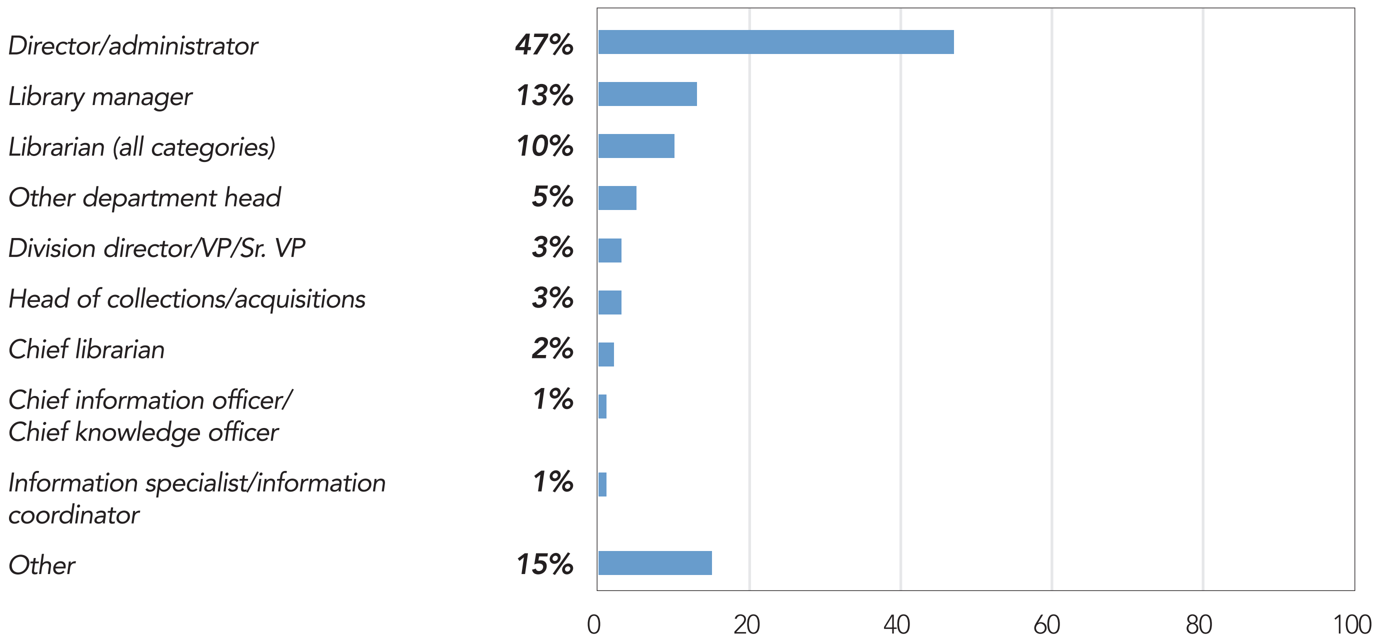
Data collection and analysis performed with SurveyMethods.

DEMOGRAPHICS

Figure 40: Respondents' Titles



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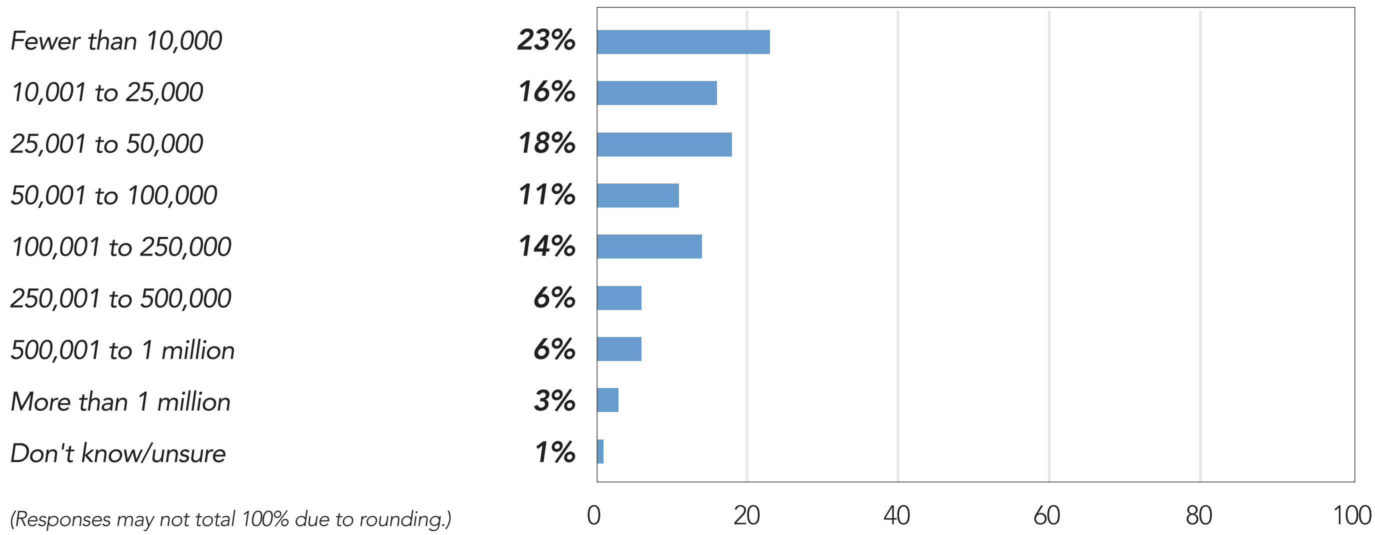
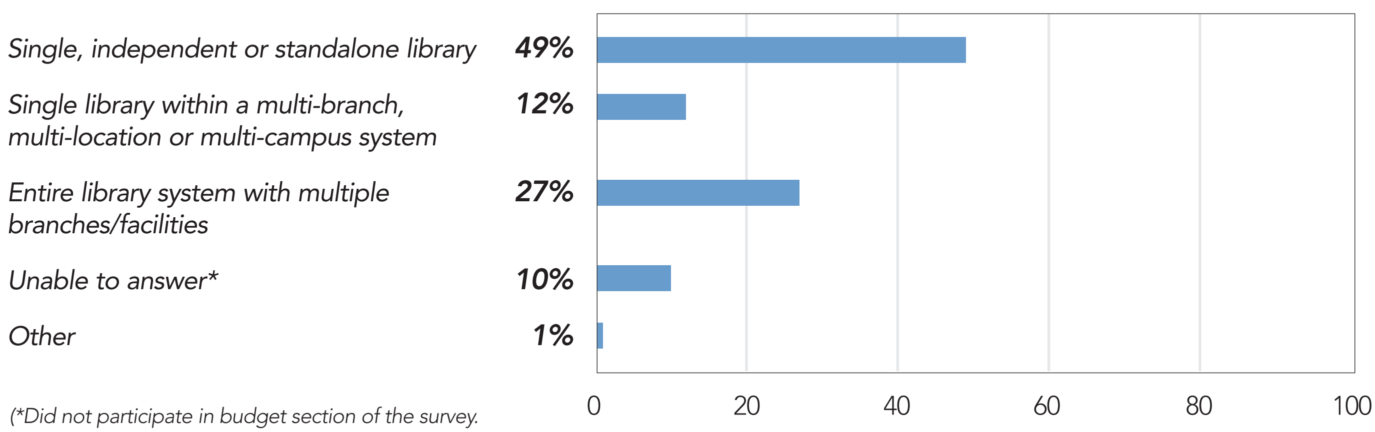
Data collection and analysis performed with SurveyMethods.

Figure 41: Populations Served



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

Figure 42: Type of Library Infrastructures Surveyed



*(*Did not participate in budget section of the survey. Responses do not total 100% due to rounding.)*

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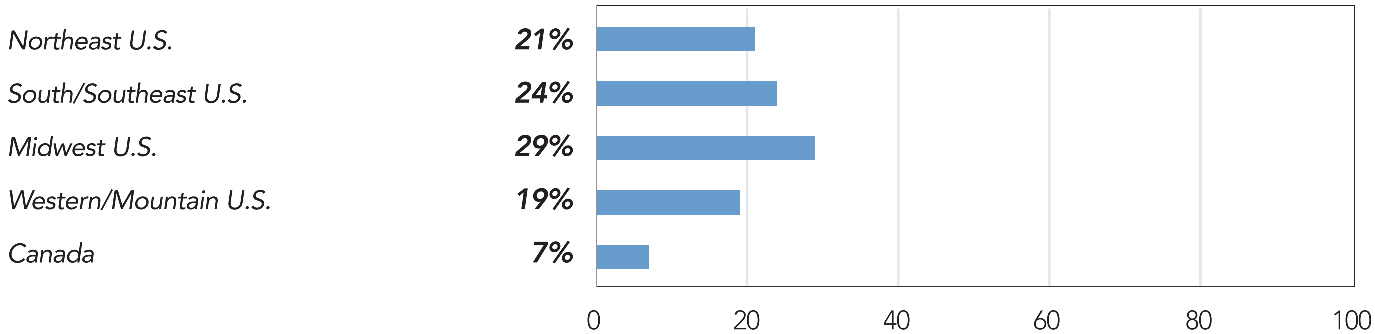
Figure 43: Respondents' States/Provinces



NUMERICAL TOTALS

Northeast U.S. 21%

CT	6
DC	1
DE	1
MD	2
MA	6
ME	1
NH	6
NJ	9
NY	9
PA	9
RI	0
VT	3

South/ Southeast U.S. 24%

AL	3
AR	3
FL	7
GA	4
KY	0
LA	2
MS	2
NC	7
OK	3
SC	1
TN	2
TX	13
VA	12
VI	1
WV	1

Midwest U.S. 29%

IA	4
IL	13
IN	9
KS	3
MI	11
MN	5
MO	2
ND	3
NE	1
OH	19
SD	3
WI	0

Western/ Mountain U.S. 19%

AK	0
AZ	5
CA	19
CO	8
HI	0
ID	3
MT	0
NM	1
NV	1
OR	1
UT	2
WA	7
WY	0

Canada 7%

Alberta	6
British Columbia	1
Manitoba	1
New Brunswick	0
Newfoundland and Labrador	0
Nova Scotia	1
NW Territories	0
Nunavut	0
Ontario:	5
Prince Edward Island	0
Quebec	3
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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