



**LIBRARY BUDGET  
PREDICTIONS FOR 2008**

**Results from a telephone  
survey August 2007**

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## Executive Summary

### 1.1 Why was the survey carried out?

- The main purpose of this study is to provide an early indication of library budgets for 2008. The timing of the survey is such to ensure the most accurate predictions for next year's budgets.

### 1.2 What was done?

- A telephone survey was carried out at 416 institutional libraries. Institutes in North America, Europe and in the Asia Pacific Region were contacted.
- Senior librarians with control over and knowledge of library budgets for 2008 were contacted.
- Academic institutions were split into categories reflecting the size of their institute.
- The survey was supplemented with desk research that examined the history of serial expenditures at American Research Libraries (ARL) in the USA.

### 1.3 Summary of results

- The overall library budget is set to **increase by 0.6%** (last year a 1.1% increase was forecast).
- N. America will see a 1.3% increase, Europe a 0.7% increase and Asia Pacific a 0.5% decrease.
- The materials budgets are predicted to **increase by 1.5%**, not a substantive increase but nonetheless the highest forecast over the last 6 years.
- This breaks down into a 1.8% increase for North America, a 1.7% increase for Europe, and an increase of 0.8% in Asia Pacific.
- Academic institutes predict the largest increase at 2.1%.
- It is estimated that approximately 38% of the library budget is spent on electronic information sources.
- Serials Budgets are forecast to **rise by 2.5%** (3.4% last year)
- North America predicts a 4.2% increase, Europe a 1.4% increase and Asia Pacific a 1.8% increase.
- In terms of organisation types, Government predict the largest increases at 4.1%, with academic institutes predicting a 2.2% increase.
- As in previous years librarians complain bitterly about serial price increases.
- However, ARL data shows us that institutes generally are getting better value for money - the average price paid for a serial subscription in 2006 (\$244) is lower than it was in 1997 (\$249).
- Book expenditure is forecast to **increase by 0.8%** (last year 0.4%).
- North America predicts a 1% increase, Europe a 0.2% decrease and Asia Pacific a 2% increase.
- The number of Major Reference Works (MRWs) likely to be purchased in 2008 is forecast to be 0.1% less than in 2007.
- E-Journal services 93% of institutes take an e-journal service. E-only journals represent 43% of journal subscriptions. Print only represents 29% of subscriptions, while the remainder (28%) are part of a combined print and electronic package.
- 19% of those with E-journal services have a separate budget for them, the majority of which are predicted to increase, with an overall average increase of 6.3%.
- 'Open Access' journal presence is increasing, 75% of institutes catalogue or provide Open Access journals. Librarians estimate that 7.5% of their journals are now Open Access (last year it was 4%)
- A&I Services are provided by 88% of respondents. 24% have a separate budget which is forecast to increase by 1.6%.
- Inter-Library Loans are predicted to increase by 2.7%. Demand has increased as greater electronic access has stimulated demand.

## 2 Who was surveyed?

- Altogether 416 institutes were successfully surveyed, from a range of countries and institute types.
- The confidence interval is 4.7%± at 95% confidence levels; however it must be borne in mind that the estimates made by some librarians are indications. If a librarian was not able to confidently indicate the likely amount of change, their position was counted in the broader qualitative context, whether it would 'increase' or 'decrease'.
- Librarians who were surveyed last year were approached again this year to take part in the survey.
- The survey was completed in North America, Europe and the Asia Pacific Region.
- Institutions were chosen from North America (USA, Mexico and Canada) and Europe (16 countries) and Asia Pacific (9 countries).
- Librarians were asked to quantify the number of members for the library. The average results by region and institute type are in the table below

Region	Level	Members/Students
North America	Academic top	28,625
	Academic middle	15,906
	Academic lower	4,370
	Medical/Health	3,553
	Government	3,250
	Corporate	3,676
Europe	Academic top	30,463
	Academic middle	19,205
	Academic lower	5,518
	Medical/Health	5,175
	Government	3,853
	Corporate	6,000
Asia Pacific	Academic top	43,611
	Academic middle	19,074
	Academic lower	3,266
	Medical/Health	6,273
	Government	3,111
	Corporate	13,167

### 2.1 Average Total Library Budget in 2008

- Each librarian was asked approximately what their total library budget would be in 2008. It should be noted that not all librarians answered this question.

Organisation	Ave. Bud. in US\$
Academic top	8,239,896
Academic middle	2,570,578
Academic lower	1,395,741
Medical/Health	165,521
Government	849,826
Corporate	443,004

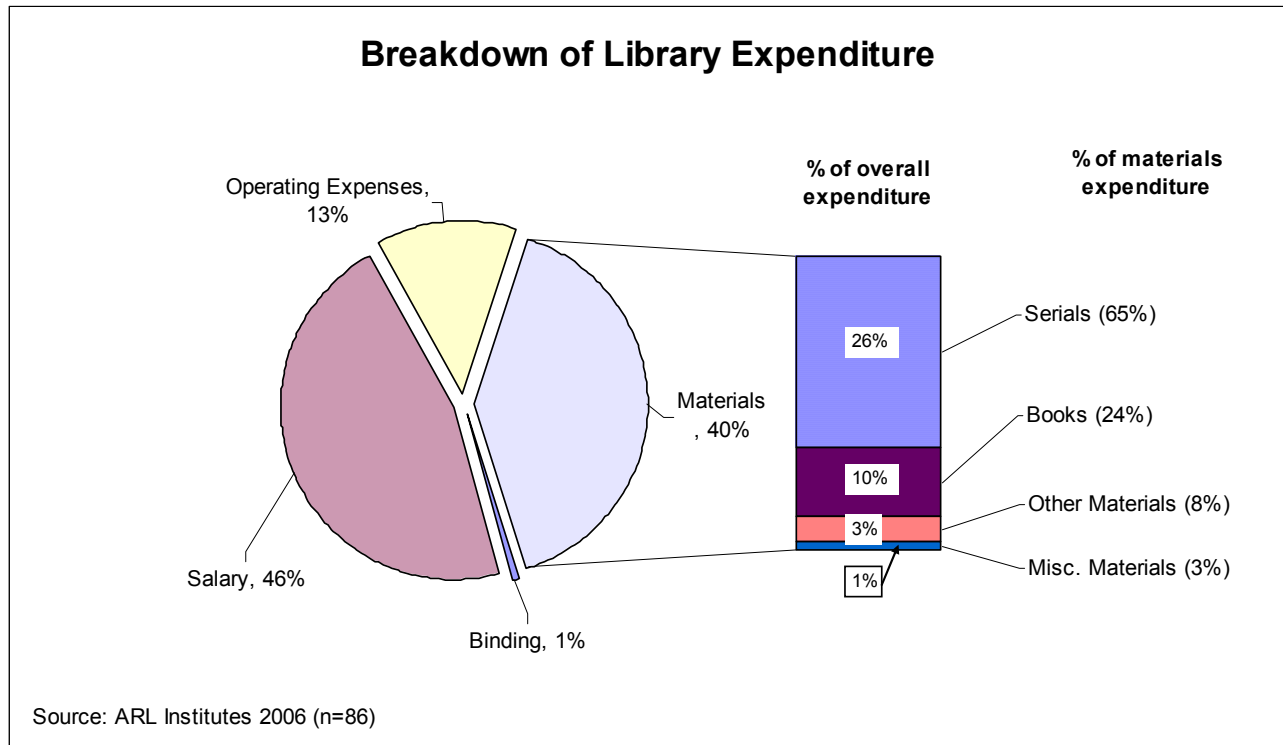
## 2.2 Sample Frame

- The sample frame was constructed into several organisation types: Academic, Corporate, Medical and Government - the Academic sector was further split into three groups based upon size of the institute. The breakdown by country and type is in the table below.

Region	Country	Academic			Corp.	Gov't	Medical	Total	% of overall sample
		Academic top	Academic middle	Academic lower					
Asia Pacific	Australia	2	2	2	1	1	1	<b>9</b>	2%
	China	5	10		3	3	3	<b>24</b>	6%
	Hong Kong			2				<b>2</b>	0%
	India	2	2	2	1	1	1	<b>9</b>	2%
	Israel		1	2				<b>3</b>	1%
	Japan		5	23	1	3	4	<b>36</b>	9%
	Korea		4	2	1	1	1	<b>9</b>	2%
	New Zealand	2	1					<b>3</b>	1%
	Taiwan		4	2	1	1	1	<b>9</b>	2%
	<i>Total</i>		<i>11</i>	<i>29</i>	<i>35</i>	<i>8</i>	<i>10</i>	<i>11</i>	<b>104</b>
Europe	Austria	1	1	1				<b>3</b>	1%
	Belgium	1	1	1	1	1	1	<b>6</b>	1%
	Denmark	1		2	1	1	1	<b>6</b>	1%
	Finland	1	1	1			1	<b>4</b>	1%
	France	5	2	8	3	3	3	<b>24</b>	6%
	Germany	3	5	4	3	3	3	<b>21</b>	5%
	Ireland		2	1			1	<b>4</b>	1%
	Italy	3	4	2	2	2	2	<b>15</b>	4%
	Netherlands	1	3	2	1	1	1	<b>9</b>	2%
	Norway	1	1	1	1	1	1	<b>6</b>	1%
	Poland	1		2	1		1	<b>5</b>	1%
	Portugal		3					<b>3</b>	1%
	Spain	4	2		2	1	2	<b>11</b>	3%
	Sweden	1	1	1	1	1	1	<b>6</b>	1%
	Switzerland	1		1	1	1	1	<b>5</b>	1%
	UK	6	6	9	4	4	5	<b>34</b>	8%
<i>Total</i>		<i>30</i>	<i>32</i>	<i>36</i>	<i>21</i>	<i>19</i>	<i>24</i>	<b>162</b>	<b>39%</b>
North America	Canada	4	2	3	2	2	2	<b>15</b>	4%
	Mexico	3						<b>3</b>	1%
	USA	29	25	27	17	16	18	<b>132</b>	32%
	<i>Total</i>	<i>36</i>	<i>27</i>	<i>30</i>	<i>19</i>	<i>18</i>	<i>20</i>	<b>150</b>	<b>36%</b>
<b>Grand Total</b>		<b>77</b>	<b>88</b>	<b>101</b>	<b>48</b>	<b>47</b>	<b>55</b>	<b>416</b>	<b>100%</b>
<b>Overall %</b>		<b>19%</b>	<b>21%</b>	<b>24%</b>	<b>12%</b>	<b>11%</b>	<b>13%</b>	<b>100%</b>	

### 3 Breakdown of the Overall Library Budget

- The overall library budget includes the ongoing costs of maintaining a library, salary, materials and operating expenditure. This main focus of this study is on components of the materials budget.
- By examining the Association of Research Libraries (ARL) expenditure we can get an idea of how library budgets breakdown.
- The ARL statistics include details of collections, expenditures, staffing, and service activities for its member libraries
- In 2006 86 university members of the ARL reported a combined expenditure in excess of \$2,165 million. This expenditure broke down into four areas: salaries, which were \$996.5 million (46%), material costs, which were \$874.6 million (40%), binding \$14.8 million (1%) and other operating expenditure\* (13%) which loosely defined the remainder of the budget.
- The materials budget (\$874.6 million) broke down into serials expenditure at \$569.9 million (65%), books expenditure at \$205.6 million (24%), with the remaining \$99.1million (11%) for miscellaneous expenditure and other materials.



**Figure 1 Breakdown Overall Library Budget**

\* A catchall category used by the ARL for any expenditure other than materials, personnel and binding, it does not always include expenditures for buildings or maintenance costs, often these are assumed by the university centrally.

## 4 Overall Library Budget Change for 2008

- Overall library budgets continue to be squeezed. As last year only a small percentage increase is forecast. The predicted increase for 2008 at **0.6%** is well below the rate of inflation for most western countries. As in previous years the overall small increase tends to disguise higher increases in subsidiary budgets, such as materials; particularly, serials and books. Continuing evidence of librarians' needs and ability to juggle their budgets to meet costs.
- While the overall increase is small, **North American** institutes are slightly more optimistic with a **1.3%** increase forecast, **Europe** predicts a **0.7% increase** while the **Asia Pacific** region forecasts a **decrease of 0.5%**. The drop in the Asian market is mostly a consequence of movements in the lower academic market with particular downturns in the Japanese sector.
- Qualitative predictions suggest that under a third of institutes will see an increase in their budget with the majority believing their budget will remain static. A minority, 15%, believe their budgets will drop.
- Corporate and Governments both predict small declines in budget, with medical/health showing a small increase.

		<i>Qualitative Predictions</i>			<i>Quantitative Predictions</i>
		% respondents predicting			
<b>Region</b>	<b>Organisation</b>	<b>Increase</b>	<b>Static</b>	<b>Decrease</b>	<b>% Budget Change</b>
North America	Academic Top	35%	59%	6%	1.9
	Academic Middle	36%	48%	16%	-0.2
	Academic Lower	63%	33%	3%	3.6
	<i>All Academic</i>	45%	47%	8%	1.9
	Medical/Health	44%	44%	11%	2.0
	Government	7%	67%	27%	-1.3
	Corporate	17%	67%	17%	0.0
	<b>Overall</b>	<b>37%</b>	<b>51%</b>	<b>11%</b>	<b>1.3</b>
Europe	Academic Top	41%	52%	7%	1.7
	Academic Middle	24%	72%	3%	0.8
	Academic Lower	13%	73%	13%	0.0
	<i>All Academic</i>	26%	66%	8%	0.8
	Medical/Health	22%	70%	9%	0.6
	Government	0%	83%	17%	-0.3
	Corporate	30%	65%	5%	1.0
	<b>Overall</b>	<b>23%</b>	<b>68%</b>	<b>9%</b>	<b>0.7</b>
Asia Pacific	Academic Top	55%	36%	9%	5.8
	Academic Middle	39%	36%	25%	1.3
	Academic Lower	21%	35%	44%	-4.0
	<i>All Academic</i>	33%	36%	32%	-0.5
	Medical/Health	18%	73%	9%	0.6
	Government	33%	44%	22%	0.6
	Corporate	50%	17%	33%	-4.5
	<b>Overall</b>	<b>32%</b>	<b>39%</b>	<b>28%</b>	<b>-0.5</b>
Overall	Academic Top	40%	53%	7%	2.4
	Academic Middle	33%	52%	15%	0.7
	Academic Lower	32%	47%	21%	-0.3
	<i>All Academic</i>	35%	50%	15%	<b>0.8</b>
	Medical/Health	29%	62%	10%	1.1
	Government	11%	67%	22%	-0.5
	Corporate	27%	59%	14%	-0.2
	<b>Overall</b>	<b>31%</b>	<b>54%</b>	<b>15%</b>	<b>0.6</b>

## 5 Material Budget change for 2008

- The material budget covers all the costs a library incurs when purchasing content for the library, including journal subscriptions, book costs, inter library loans etc.

### Quantitative Predictions

- Material Budgets are set to increase in 2008 by **1.5%** (last year 1%), while this figure is not substantive; it does represent the highest predicted increase over the last 6 years.
- Of the three geographical regions, **North American** budgets, as last year are set to increase by most at **1.8%**. Not far behind is **Europe** at **1.7%**, rebounding somewhat from last year when a 0.2% was forecast, and **Asia Pacific** the lowest, forecasting an increase of **0.8%**.
- Academic libraries are relatively robust with a 2.1% mean increase, which is the highest predicted expansion in recent years.
- Non-academic institutes indicate only moderate increases in budget with governmental institutes indicating a decline.

### Qualitative Predictions

- Qualitative predictions suggest that over a third of institutes will see an increase in their budget with the majority, as with the overall budget, believing their budget will remain static. A minority, 15%, believe their budgets will drop.
- The most optimistic area is North America with 40% (46% last year) predicting an increase.
- Unsurprisingly, the highest number of institutes predicting a downturn is in Asia Pacific, with 22% of institutes predicting drops. This is the second successive year that a high proportion of institutes predict a downturn (21% last year). It must be noted that the Asia Pacific figure is largely influenced by the purchasing power of Japanese institutes. Once Japan is removed from the equation, China, Taiwan and India all show increases (ranging from 3% to 9%).
- In Europe 32% believe their budgets will increase, a slightly upbeat assessment considering last year 23% predicted increases.

		Qualitative Predictions			Quantitative Predictions
		% respondents predicting			
Region	Organisation	Increase	Static	Decrease	% Budget Change
North America	Academic Top	39%	50%	11%	1.8
	Academic Middle	52%	30%	19%	0.9
	Academic Lower	70%	27%	3%	6.3
	<i>All Academic</i>	<i>53%</i>	<i>37%</i>	<i>11%</i>	<i>3.0</i>
	Medical/Health	28%	50%	22%	0.9
	Government	12%	53%	35%	-1.4
	Corporate	13%	50%	38%	-0.9
	<b>Overall</b>	<b>40%</b>	<b>42%</b>	<b>18%</b>	<b>1.8</b>
Europe	Academic Top	50%	47%	3%	2.5
	Academic Middle	41%	56%	3%	1.5
	Academic Lower	22%	69%	8%	2.5
	<i>All Academic</i>	<i>37%</i>	<i>58%</i>	<i>5%</i>	<i>2.2</i>
	Medical/Health	29%	67%	4%	1.1
	Government	0%	71%	29%	0.2
	Corporate	37%	58%	5%	1.8
	<b>Overall</b>	<b>32%</b>	<b>61%</b>	<b>7%</b>	<b>1.7</b>
Asia Pacific	Academic Top	55%	36%	9%	7.5
	Academic Middle	31%	62%	8%	2.5
	Academic Lower	21%	44%	35%	-2.5
	<i>All Academic</i>	<i>30%</i>	<i>49%</i>	<i>21%</i>	<i>0.9</i>
	Medical/Health	45%	45%	9%	2.8
	Government	0%	75%	25%	-3.0
	Corporate	43%	14%	43%	1.6
	<b>Overall</b>	<b>30%</b>	<b>48%</b>	<b>22%</b>	<b>0.8</b>
Overall	Academic Top	45%	47%	8%	2.9
	Academic Middle	41%	49%	9%	1.6
	Academic Lower	36%	48%	16%	1.9
	<i>All Academic</i>	<i>40%</i>	<i>48%</i>	<i>11%</i>	<i>2.1</i>
	Medical/Health	32%	57%	11%	1.4
	Government	5%	64%	31%	-1.0
	Corporate	29%	48%	24%	0.7
	<b>Overall</b>	<b>35%</b>	<b>51%</b>	<b>15%</b>	<b>1.5</b>

### 5.1 Expenditure of Materials Budget on Electronic Information sources

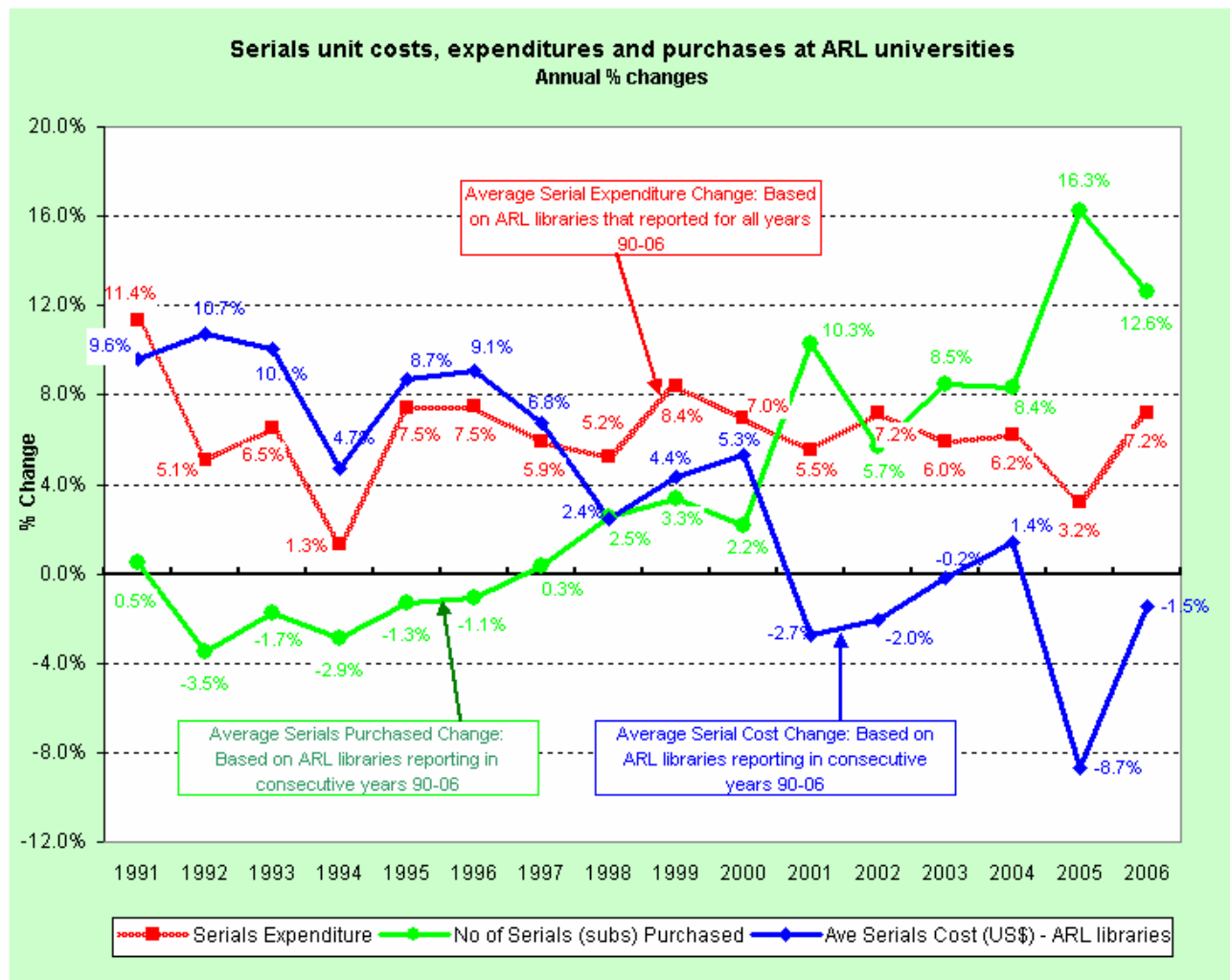
- The below figures do not represent a prediction, but an estimate of spend on electronic resources during the year of the survey (2007), rather than the subsequent year.
- As we might expect the year on year figures broadly show a general increase in the proportion of spend on electronic resources. The current average is 38%. This represents a substantial increase since last year (8%), a shift that is consistent across the board with the exception of lower end academic institutes in North America.
- It is worth noting some differences at the region level, in Europe 41% of expenditure is on electronic resources, an increase of 7% on last year, and perhaps what is most surprising is that this figure is higher than both North America (37%) and Asia (33%).

Region	Organisation	% (2004)	% (2005)	% (2006)	% (2007)
North America	Academic Top	29.6	30.6	30.5	39.1
	Academic Middle	26.4	34.5	31.5	37.1
	Academic Lower	27.7	23.1	25.1	23.4
	Medical/Health	29.5	30.1	33.1	34.2
	Government	29.9	34.7	32.5	51.4
	Corporate	38.5	45.5	39.9	48.8
	<b>Overall</b>	<b>29.7</b>	<b>31.4</b>	<b>31.4</b>	<b>37.2</b>
Europe	Academic Top	27.8	38.2	27.9	45.7
	Academic Middle	23.4	34.1	34.0	38.3
	Academic Lower	25.6	27.3	31.1	33.8
	Medical/Health	25.5	44.1	38.8	40.0
	Government	33.2	32.6	31.4	45.5
	Corporate	41.5	37.9	45.6	45.3
	<b>Overall</b>	<b>28.5</b>	<b>35.5</b>	<b>34.0</b>	<b>40.7</b>
Asia Pacific	Academic Top	25.8	30.0	29.8	38.8
	Academic Middle	25.6	38.6	31.3	39.2
	Academic Lower	10.5	26.4	16.3	23.2
	Medical/Health	16.8	15.3	7.6	33.3
	Government	19.1	14.9	31.4	33.0
	Corporate	26.3	19.1	22.6	45.3
	<b>Overall</b>	<b>20.1</b>	<b>25.7</b>	<b>23.5</b>	<b>33.2</b>
Overall	Academic Top	28.1	33.5	29.4	41.7
	Academic Middle	24.9	35.4	32.4	38.2
	Academic Lower	20.8	25.5	23.6	27.1
	Medical/Health	24.8	32.9	30.2	36.9
	Government	29.1	28.2	31.7	44.9
	Corporate	36.2	34.0	37.7	46.7
	<b>Overall</b>	<b>27.0</b>	<b>32.0</b>	<b>30.0</b>	<b>38.0</b>

## 6 Serial Expenditure

- In this section we examine several measures drawn from the Association of Research Libraries (ARL) statistical data<sup>1</sup>. The ARL in North America annually tracks library expenditure; it has a membership of 113, and includes amongst its members some of the largest universities in N. America.
- In recent years serials agents and publishers have introduced more and more individualised deals. Consequently the list price of journals rarely reflects the actual cost paid. The calculated ARL average serial cost is likely a good indicator of the true average serial cost incurred by institutes globally (it is derived by dividing the number of serials purchased by serial expenditure).
- In reference to the chart below, annual changes in serial expenditure during the early 1990s broadly reflects annual changes in average serial costs. Although serials expenditure increases appear to follow serials cost increases, they do so at a lower level. The gap between cost and expenditure increases up until 1996 was accommodated by decreases in the number of serial units (subscriptions) taken.
- Since 1997 there has been increases year on year in the number of paid subscriptions taken. During the same period expenditure increases have consistently been greater than average price increases. From 2000 the annual change in serial cost has been on a downward trend, and after 2003 the rate of increase in serials purchased has consistently outstripped serials expenditure increases.
- The drop in average serial cost is such that the average price paid in 1997 (\$249.5) is actually higher than the average serial cost 9 years later in 2006 (\$243.7) (see following table).

Figure 2 Serial Ave. Costs and ARL Expenditure



<sup>1</sup> <http://www.arl.org/stats/annualsurveys/arlstats/>

**Table 7. Average Serial Cost  
(ARL institutes reporting in consecutive years)**

Year	Count of institutes reporting	Average Prices in US\$ Previous Yr	Average Prices in US\$ Current Yr	% Change
<b>1991</b>	65	\$139.81	\$153.29	<b>9.6%</b>
<b>1992</b>	66	\$149.15	\$165.14	<b>10.7%</b>
<b>1993</b>	70	\$166.35	\$183.11	<b>10.1%</b>
<b>1994</b>	76	\$186.64	\$195.44	<b>4.7%</b>
<b>1995</b>	78	\$195.16	\$212.18	<b>8.7%</b>
<b>1996</b>	78	\$212.40	\$231.63	<b>9.1%</b>
<b>1997</b>	77	\$233.67	\$249.50	<b>6.8%</b>
<b>1998</b>	77	\$249.09	\$255.16	<b>2.4%</b>
<b>1999</b>	77	\$253.85	\$264.90	<b>4.4%</b>
<b>2000</b>	79	\$264.34	\$278.40	<b>5.3%</b>
<b>2001</b>	80	\$277.54	\$269.94	<b>-2.7%</b>
<b>2002</b>	80	\$270.14	\$264.62	<b>-2.0%</b>
<b>2003</b>	84	\$267.28	\$266.87	<b>-0.2%</b>
<b>2004</b>	82	\$263.94	\$267.68	<b>1.4%</b>
<b>2005</b>	83	\$272.83	\$249.03	<b>-8.7%</b>
<b>2006</b>	83	\$247.36	\$243.71	<b>-1.5%</b>

### Library budget change for 2008 - serials

- The serials budgets in 2008 are set to increase by **2.5%** (3.4% last year). Comments from librarians suggest that cost savings in other areas of the library budget have allowed for this increase above the average of the 'Materials' budget. (refer 'Variances between the overall materials budget and the serial/book budget' for more detail)
- North America** is projecting an increase of **4.2%** (4.7% last year) and **Europe 1.4%** (2% last year). As last year Medical/Health institutes in N. America are most optimistic in their forecasts at 5.4%.
- Asia Pacific** forecasts an increase of **1.8%** for 2008, last year a 3.1% increase was predicted for 2007.
- Health Care is one of the fastest growing sectors, particularly in North America, and although this is not evident in either the overall library or materials budgets, it is in the serials budget: it has one of the highest growths (4.6%). Suggesting medical institutes are quite adept at managing their budgets, further supported by comments which suggest a willingness to draw upon sponsors to make up budgets.
- Government libraries predict an above average increase at 2.4% (4.1% last year), while medical/health and corporate libraries see increases at 4.6% and 1.9% respectively.
- Qualitative predictions suggest the number of organisations forecasting an increase is 47% (52% last year).

		Qualitative Predictions			Quantitative Predictions
		% respondents predicting			
Region	Organisation	Increase	Static	Decrease	% Budget Change
North America	Academic Top	56%	28%	16%	3.0
	Academic Middle	81%	12%	8%	5.1
	Academic Lower	56%	28%	16%	2.6
	<i>All Academic</i>	<b>64%</b>	<b>23%</b>	<b>13%</b>	<b>3.5</b>
	Medical/Health	89%	0%	11%	5.4
	Government	76%	6%	18%	6.4
	Corporate	50%	33%	17%	4.1
	<b>Overall</b>	<b>67%</b>	<b>19%</b>	<b>14%</b>	<b>4.2</b>
Europe	Academic Top	45%	55%	0%	2.5
	Academic Middle	44%	56%	0%	2.1
	Academic Lower	22%	69%	9%	0.8
	<i>All Academic</i>	<b>35%</b>	<b>61%</b>	<b>4%</b>	<b>1.7</b>
	Medical/Health	47%	47%	5%	3.8
	Government	0%	85%	15%	0.5
	Corporate	21%	57%	21%	-2.0
	<b>Overall</b>	<b>32%</b>	<b>61%</b>	<b>7%</b>	<b>1.4</b>
Asia Pacific	Academic Top	60%	40%	0%	5.0
	Academic Middle	29%	54%	18%	0.9
	Academic Lower	43%	40%	17%	0.6
	<i>All Academic</i>	<b>40%</b>	<b>45%</b>	<b>15%</b>	<b>1.3</b>
	Medical/Health	55%	45%	0%	4.5
	Government	11%	67%	22%	-1.8
	Corporate	29%	57%	14%	3.9
	<b>Overall</b>	<b>38%</b>	<b>48%</b>	<b>14%</b>	<b>1.6</b>
Overall	Academic Top	53%	39%	8%	3.2
	Academic Middle	51%	41%	9%	2.7
	Academic Lower	39%	47%	14%	1.2
	<i>All Academic</i>	<b>47%</b>	<b>43%</b>	<b>11%</b>	<b>2.2</b>
	Medical/Health	65%	29%	6%	4.6
	Government	36%	46%	18%	2.4
	Corporate	36%	46%	18%	1.9
	<b>Overall</b>	<b>47%</b>	<b>41%</b>	<b>12%</b>	<b>2.5</b>

## 6.1 Reasons for increase/decrease in serial budget

Librarians were asked why their budgets increased or decreased, altogether there were 209 comments, some of these comments are included below and were selected to reflect opinion.

## 6.2 Reasons for increase in budget

Altogether 168 librarians explained why they thought their budget would increase. The vast majority (120) identified the need to match publisher price increases, with a number indicating that it was simply part of an upward trend. There was some indication of greater demand as a reason for increase in budget. Some simply because the prices are high, and they wish to buy new subscriptions. While a number attributed the effects of shifting from paper to online as the cause. Below are some of the comments from librarians reflecting the balance of opinion.

### Prices/ Inflation

"There will be a 15-20% increase in the price of journals every year.", (Area: Asia Pacific, Org:Academic middle)

"We must fill in the gaps in material from previous years.", (Area:North America, Org:Academic top)

"This will cover the price increases.", (Area: Europe, Org:Medical/Health)

"Automatic increase in the price of journals.", (Area: Asia Pacific, Org:Academic top)

"It's a trend due to inflation.", (Area: Europe, Org:Academic middle)

"It's a trend, the same as last year.", (Area: Asia Pacific, Org:Academic top)

"Publishers are overcharging and the prices are unreasonable.", (Area:North America, Org:Academic middle)

"It's a trend" x 20

"Price increases" x30

"Due to inflation"x 64

### Currency Fluctuations

"1. Because of the number of users 2 . Devaluation of Indian Rupees Currency. 3. Introduction of the new department of our university.", (Area: Asia Pacific, Org:Academic lower)

"Escalation in the foreign exchange rates.", (Area: Asia Pacific, Org:Academic top)

"Increase in exchange rate and switching from print to e-journal.", (Area: Asia Pacific, Org:Academic top)

### Increases in demand

"Due to increase of research activities.", (Area: Asia Pacific, Org:Corporate)

"Due to new subjects.", (Area: Asia Pacific, Org:Academic lower)

"Larger demands of users.", (Area: Asia Pacific, Org:Academic lower)

"Now serving entire ministries of seniors and community supports.", (Area:North America, Org:Government)

"Prices will go up. They have more users.", (Area:North America, Org:Corporate)

"Short term adjustments in subscriptions and also shift in clinical areas served", (Area:North America, Org:Medical/Health)

"There is an increase demand of journal and serial subscription", (Area: Europe, Org:Academic middle)

"They have more demand", (Area: Europe, Org:Government)

### Effects of going online

"Because of the inflation factor, we also add a few more electronic journals." (Area:North America, Org:Academic lower)

"Due to the purchase of different print and electronic resources" (Area:North America, Org:Academic lower)

"Inflation and the surge of electronic journals" (Area: Europe, Org:Academic middle)

"Inflation and they are moving totally to electronic resources. Even though they are a virtual campus, there are still some students that come into the library and want to use the print." (Area: Asia Pacific, Org:Academic top)

"It will increase, exact amount unknown due to the increase in electronic journals." (Area:North America, Org:Academic top)

"The number of print journals goes down and the electronic journals go up, especially packages." (Area:North America, Org:Academic lower)

"They are leaning more towards providing electronic resources" (Area:North America, Org:Academic lower)

"We plan on switching from printed matter to electronic journals since western magazines are increasingly become available electronically, and it is possible to apply to MEXT for grant money to purchase electronic journals." (Area: Asia Pacific, Org:Academic lower)

### New funds

"More money available" (Area: Europe, Org: Academic top)

## 6.3 Reasons for decrease in budget

41 librarians gave a variety of reasons for the decreases in budget. Some of their comments are below.

### Lack of funds

"We are not expected to keep up with inflation this year due to lack of funds." Area :(North America)

Org:(Government)

"Budget cuts", Area :( Europe) Org :( Corporate)

"It will be a decrease due to journal cutbacks.", Area :(North America) Org:(Academic top)

"The fiscal health of the center is a problem.", Area :(North America) Org:(Academic middle)

"Cut-back in budget allocations and expenditures due to a lack of tax revenue", Area:(Asia Pacific)

Org:(Government)

"Lower budgets", Area:(Europe) Org:(Academic lower)

"Less funds available, need to cancel subscription", Area:(Europe) Org:(Corporate)

"It's a decrease...we must give money back this year from the materials budget!", Area :( North America) Org :( Academic top)

"Because of the same amount of cut-backs every year", Area :( Asia Pacific) Org :( Government)

"Budget cuts, reduced workforce", Area :( Europe) Org :( Government)

### **Price Inflation**

"Costs for different areas/ materials rise", Area :( Europe) Org :( Government)

"Inflation", Area :( North America) Org :( Academic top)

"It will be a decrease due to an increase in prices." Area :( North America) Org :( Corporate)

"The prices are going up.", Area :( North America) Org :( Corporate)

"There will be a decrease, due to canceling and inflation.", Area:(North America) Org:(Academic top)

"There will be a decrease due to publisher prices continually going up.", Area:(North America) Org:(Academic lower)

"There is going to be a decrease. They don't have any funding and prices are going up.", Area:(Europe)

Org:(Academic lower)

### **Effects of converting to electronic**

"Prioritize the use of electronic journals, and stop the purchase of bound materials as much as possible.",

Area:(Asia Pacific) Org:(Academic lower)

"Because we are shifting from print to electronic resources", Area:(Asia Pacific) Org:(Academic middle)

"Due to the Increase in the use of electronic journals.", Area:(North America) Org:(Academic middle)

"They have been canceling the print and switching to electronic journals.", Area:(North America) Org:(Academic lower)

### **Other**

"Due to the 10% reduction in manpower, three libraries closed, she does not know when they will receive the new budget. She's hoping that it will Remain the same, but it will probably be a decrease.", Area:(North America) Org:(Corporate)

## 6.4 Plans for serial additions and cancellations

The majority of libraries juggle their budgets by cancelling and subscribing to different journals. It is entirely feasible for an institute to see a decrease in serials budget but an increase in the number of journals purchased (through the acquisition of more inexpensive titles). Librarians are primarily juggling budgets in order to maintain current expenditure levels while trying to meet the demands of staff for new serials.

This year more institutes will be adding (47%), than cancelling (29%). Moreover, the bigger group, those adding, will also be adding on average more serials (22) than the smaller group that will be cancelling (17). Without a concomitant increase in the 'serials budget', it is likely that more inexpensive journals are being added to collections.

### 6.4.1 Serial additions

- Altogether 202 different institutes will add journals to their collections. More European organisations (52%) plan to add serials (albeit relatively small numbers of serials) than their North American (47%) or Asian counterparts (41%). The average number of titles added is 22

### 6.4.2 Cancellation of serials

- 118 institutes plan to cancel serial subscriptions. The largest number of cancellations comes from Asia Pacific with 40%. North America is buoyant with a relatively low number cancelling 28% (last year it was 40%).
- 25% of European institutes plan to cancel (38% last year). Average number of cancellation is 17.

		Qualitative Predictions (Increase)			Qualitative Predictions (Decrease)		
		% respondents predicting					
Region	Organisation	Increase	No Additions	Unable to say	Cancellations	No Cancellations	Unable to say
North America	Academic Top	53%	44%	3%	25%	17%	58%
	Academic Middle	59%	41%	0%	30%	30%	41%
	Academic Lower	60%	40%	0%	40%	7%	53%
	<i>All Academic</i>	57%	42%	1%	31%	17%	52%
	Medical/Health	35%	55%	10%	40%	40%	20%
	Government	33%	61%	6%	11%	33%	56%
	Corporate	26%	68%	5%	16%	47%	37%
	<b>Overall</b>	<b>47%</b>	<b>49%</b>	<b>3%</b>	<b>28%</b>	<b>26%</b>	<b>46%</b>
Europe	Academic Top	60%	30%	10%	37%	17%	47%
	Academic Middle	66%	31%	3%	19%	25%	56%
	Academic Lower	39%	44%	17%	19%	33%	47%
	<i>All Academic</i>	54%	36%	10%	24%	26%	50%
	Medical/Health	58%	29%	13%	33%	29%	38%
	Government	0%	80%	20%	21%	32%	47%
	Corporate	57%	29%	14%	19%	14%	67%
	<b>Overall</b>	<b>52%</b>	<b>37%</b>	<b>12%</b>	<b>25%</b>	<b>25%</b>	<b>50%</b>
Asia Pacific	Academic Top	45%	18%	36%	9%	18%	73%
	Academic Middle	45%	34%	21%	41%	38%	21%
	Academic Lower	46%	46%	9%	49%	34%	17%
	<i>All Academic</i>	45%	37%	17%	40%	33%	27%
	Medical/Health	45%	36%	18%	18%	55%	27%
	Government	20%	70%	10%	30%	40%	30%
	Corporate	25%	50%	25%	25%	38%	38%
	<b>Overall</b>	<b>41%</b>	<b>41%</b>	<b>17%</b>	<b>36%</b>	<b>37%</b>	<b>28%</b>
Overall	Academic Top	55%	35%	10%	27%	17%	56%
	Academic Middle	57%	35%	8%	30%	31%	40%
	Academic Lower	48%	44%	9%	36%	26%	39%
	<i>All Academic</i>	53%	38%	9%	31%	25%	44%
	Medical/Health	47%	40%	13%	33%	38%	29%
	Government	21%	68%	11%	19%	34%	47%
	Corporate	40%	48%	13%	38%	63%	0%
	<b>Overall</b>	<b>47%</b>	<b>43%</b>	<b>10%</b>	<b>29%</b>	<b>28%</b>	<b>43%</b>

## 7 Electronic Journals

### 7.1 Breakdown of serial subscription into format type

- Librarians were asked if they took an e-journal service and also what proportion of their subscriptions were received in electronic form.
- 93% of organisations surveyed currently use e-journal service providers (6% higher than last year).
- While the proportion of journals taken in e-only format has increased by 10% since last year, just under a third of subscriptions are still in print, this rises to just under 60% when you take into account the print portion of the combined subscription.

Table 10. Breakdown of serials subscriptions into format type in 2007					
		% of journal subscriptions received in different formats			
Region	Institution	Print only (derived)	elec.jnls only	combined elect & paper	% of institutes using electronic journal services
North America	Academic Top	31.9	45.9	22.2	100%
	Academic Middle	25.6	52.4	22.1	100%
	Academic Lower	35.2	54.3	10.5	100%
	<i>All Academic</i>	32.1	50.6	17.3	100%
	Medical/Health	26.8	40.7	32.5	95%
	Government	31.2	49.2	19.6	94%
	Corporate	33.7	41.7	24.7	88%
	<b>Overall</b>	<b>31.7</b>	<b>47.4</b>	<b>20.9</b>	<b>97%</b>
Europe	Academic Top	25.8	38.0	36.2	100%
	Academic Middle	23.0	38.3	38.7	100%
	Academic Lower	21.5	37.8	40.6	100%
	<i>All Academic</i>	22.1	39.4	38.5	100%
	Medical/Health	17.5	37.8	44.7	100%
	Government	29.1	31.1	39.9	100%
	Corporate	26.8	42.3	30.9	78%
	<b>Overall</b>	<b>22.7</b>	<b>38.5</b>	<b>38.8</b>	<b>97%</b>
Asia Pacific	Academic Top	18.8	62.5	18.8	80%
	Academic Middle	6.7	67.5	25.8	78%
	Academic Lower	48.2	34.9	16.9	94%
	<i>All Academic</i>	32.8	47.5	19.7	86%
	Medical/Health	65.9	20.4	13.8	73%
	Government	36.7	34.4	28.9	80%
	Corporate	25.0	55.7	19.4	67%
	<b>Overall</b>	<b>35.7</b>	<b>44.1</b>	<b>20.2</b>	<b>82%</b>
Overall	Academic Top	26.0	45.7	28.3	97%
	Academic Middle	20.4	49.8	29.9	91%
	Academic Lower	37.5	40.5	22.0	98%
	<i>All Academic</i>	29.2	44.8	26.0	95%
	Medical/Health	28.0	36.4	35.6	92%
	Government	32.2	37.7	30.1	93%
	Corporate	29.9	43.5	26.7	80%
	<b>Overall</b>	<b>29.5</b>	<b>42.6</b>	<b>28.0</b>	<b>93%</b>

## 7.2 Serial Expenditure on Electronic Serials

- As with the materials budget, within the serials budget, we have also seen an increase in the proportion spent on electronic information sources, in fact there is a slightly higher increase here at 10%.

**Table 11. Percentage serials expenditure on electronic serials (Current year)**

Region	Organisation	% expenditure (2006)	% expenditure (2007)
North America	Academic Top	23	42
	Academic Middle	25	39
	Academic Lower	14	21
	<i>All Academic</i>	21	35
	Medical/Health	32	34
	Government	40	50
	Corporate	39	40
	<b>Overall</b>	<b>26</b>	<b>37</b>
Europe	Academic Top	31	40
	Academic Middle	35	42
	Academic Lower	36	33
	<i>All Academic</i>	34	38
	Medical/Health	38	38
	Government	38	44
	Corporate	43	38
	<b>Overall</b>	<b>36</b>	<b>39</b>
Asia Pacific	Academic Top	24	38
	Academic Middle	33	49
	Academic Lower	26	41
	<i>All Academic</i>	27	43
	Medical/Health	9	34
	Government	31	31
	Corporate	18	37
	<b>Overall</b>	<b>25</b>	<b>41</b>
Overall	Academic Top	26	41
	Academic Middle	30	43
	Academic Lower	24	33
	<i>All Academic</i>	<b>27</b>	<b>39</b>
	Medical/Health	30	36
	Government	37	43
	Corporate	35	39
	<b>Overall</b>	<b>29</b>	<b>39</b>

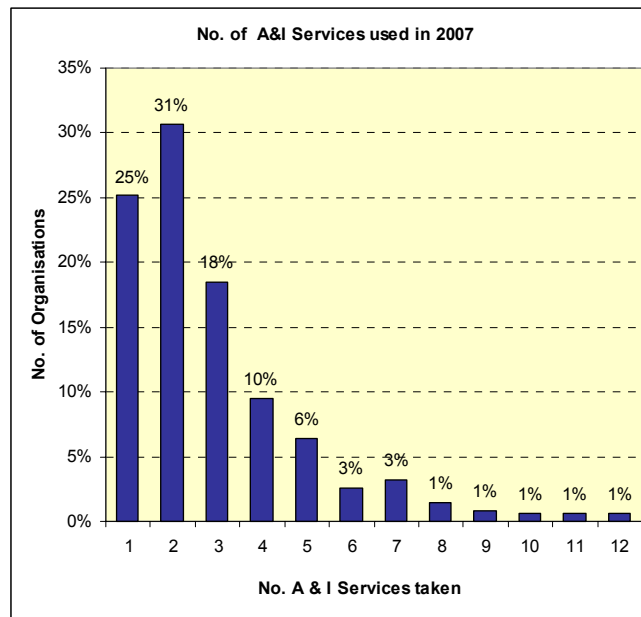
## 7.3 E-Journal Budgets

- 19.2% of those surveyed have a separate budget for e-journals (a slight increase on last year's figure of 17.5%).
- Overall** the budget is set to increase by **6.3%**. The majority (50%) of those with an e-journal budget forecast an increase for 2008, with an average increase of 12.2%. Of those remaining, 35% will maintain their current position, 6.2% forecast a decrease whilst the remainder are unsure.

## 8 Abstracting and Indexing Services

- The majority of respondents 88% (88% last year) provide access to abstracting and indexing services.
- Of those who take or considering taking A&I services 24% have a separate budget for this. Overall this budget is set to increase by an average of 1.6% (1.8% last year).
- Qualitative predictions suggest that 36% believe there will be an increase in budget for 2008. Those predicting an increase estimate an increase of 10%.
- The majority of institutes take two or more A&I services (75%)

Forecast with separate budget	%	Mean %	No.
Decrease	3%	-19.4	3
Unable to say	22%	0	19
Increase	36%	10.4	31
Static	39%	0	34
Total	100%	1.6	87



**Figure 3 No. of A&I Services**

## 9 Library budget change for 2008 – books

- **Book expenditure in 2008** is predicted to increase by **0.8%** which is only slightly more optimistic a forecast than the 0.4% predicted last year.
- The **Asia Pacific region** forecasts the largest increase at 2.0% (0.3% increase last year).
- **North American** organisations predict an increase of 1%, a drop since last year when 2.7% was forecast.
- **European** organisations are predicting another difficult year and forecasting a decrease of **0.2%** (1.8% decrease was forecast last year).
- Medical and health institutes are being relatively upbeat, forecasting a 4.5% increase, with largest increase coming in Asia
- Qualitative forecasts indicate that the majority (62%) of organisations believe their budgets will remain static. Only 22% of organisations predict that their budget expenditure for 2008 will increase.

<b>Table 13. Library Budget change for 2008 - Books Budget</b>					
		Qualitative Predictions			Quantitative Predictions
		% respondents predicting			
Region	Organisation	Increase	Static	Increase	% Budget Change
North America	Academic Top	11%	75%	14%	-0.4
	Academic Middle	26%	56%	19%	1.4
	Academic Lower	37%	50%	13%	2.5
	<i>All Academic</i>	24%	61%	15%	1.0
	Medical/Health	16%	79%	5%	3.7
	Government	6%	81%	13%	-0.6
	Corporate	16%	63%	21%	-0.4
	<b>Overall</b>	<b>20%</b>	<b>66%</b>	<b>14%</b>	<b>1.0</b>
Europe	Academic Top	30%	56%	15%	-0.7
	Academic Middle	17%	73%	10%	0.3
	Academic Lower	25%	66%	9%	1.1
	<i>All Academic</i>	24%	65%	11%	0.3
	Medical/Health	17%	67%	17%	-0.4
	Government	0%	94%	6%	0.0
	Corporate	11%	72%	17%	-2.3
	<b>Overall</b>	<b>18%</b>	<b>69%</b>	<b>12%</b>	<b>-0.2</b>
Asia Pacific	Academic Top	64%	27%	9%	3.6
	Academic Middle	30%	52%	19%	2.1
	Academic Lower	17%	46%	37%	-3.3
	<i>All Academic</i>	29%	45%	26%	-0.3
	Medical/Health	45%	55%	0%	16.6
	Government	20%	40%	40%	-3.0
	Corporate	50%	50%	0%	8.4
	<b>Overall</b>	<b>31%</b>	<b>46%</b>	<b>23%</b>	<b>2.0</b>
Overall	Academic Top	26%	61%	14%	0.1
	Academic Middle	24%	61%	15%	1.2
	Academic Lower	26%	54%	21%	-0.1
	<i>All Academic</i>	25%	58%	17%	<b>0.4</b>
	Medical/Health	22%	69%	9%	4.5
	Government	7%	76%	17%	-0.9
	Corporate	20%	64%	16%	0.4
	<b>Overall</b>	<b>22%</b>	<b>62%</b>	<b>16%</b>	<b>0.8</b>

**9.1 New books in 2007**

- We asked librarians to indicate whether or not the books purchased this year represented a decrease or increase when compared to the previous year. They estimate that books purchased this year are down by 0.4% when compared to 2006.
- We also asked librarians how many books they purchased this year. The average amount of books is just over 6,000. This average represents a drop from the last year, reinforcing the accuracy of the preceding estimate by librarians.

Movement of books 07 against 06	Count	%	Mean	Min	Max
Decrease	65	16%	-16.6	-100	-1
Don't know	54	13%			
Increase	66	16%	15.0	1	100
Remain the same	231	56%	0	0	0
<b>Grand Total</b>	<b>416</b>		-0.4	-100	100

Institution	Mean	Count
Academic Top	13,637	70
Academic Middle	12,457	78
Academic Lower	5,059	93
Medical/Health	635	50
Government	1,098	41
Corporate	225	41
Overall	6,271	372

## 9.2 Percentage of books budget spent on electronic books in 2007

- Librarians were asked to estimate the proportion of their book budget which is spent on electronic books. In absolute terms the proportion is quite low when compared to serials budget, but nonetheless these proportions have generally increased from this time last year.

<b>Region</b>	<b>Organisation</b>	<b>2006</b>	<b>2007</b>
North America	Academic Top	2.5	3.4
	Academic Middle	2.2	5.0
	Academic Lower	1.2	1.9
	<i>All Academic</i>	2.0	3.4
	Medical/Health	1.6	7.6
	Government	0.5	5.6
	Corporate	1.7	3.7
	<b>Overall</b>	<b>1.7</b>	<b>4.3</b>
Europe	Academic Top	3.2	7.3
	Academic Middle	2.6	3.6
	Academic Lower	1.1	6.4
	<i>All Academic</i>	2.4	5.7
	Medical/Health	2.1	0.7
	Government	0.8	10.4
	Corporate	8.4	2.1
	<b>Overall</b>	<b>2.9</b>	<b>5.1</b>
Asia Pacific	Academic Top	4.4	10.1
	Academic Middle	5.9	10.5
	Academic Lower	6.1	8.4
	<i>All Academic</i>	5.5	9.4
	Medical/Health	2.7	17.4
	Government	7.2	15.4
	Corporate	3.6	11.0
	<b>Overall</b>	<b>5.3</b>	<b>10.7</b>
Overall	Academic Top	3.3	5.7
	Academic Middle	3.2	5.9
	Academic Lower	3.0	5.7
	<i>All Academic</i>	3.2	5.8
	Medical/Health	2.0	5.9
	Government	2.6	9.2
	Corporate	4.6	3.8
	<b>Overall</b>	<b>3.1</b>	<b>6.0</b>

**10 Variances between the overall materials budget and the serial/book budget**

The materials budget is normally split into serials (65%) and books (24%) (Source ARL 2006 data) with additional budget for miscellaneous expenditure, which includes services such as binding, interlibrary loans etc. Logically any increase or decrease in the materials budget should be reflected in the books and serial budgets. However, increasingly this is rarely the case as librarians find ways of 'managing' their budgets. When there was a variance between the two sets of budget (books and serials) and the materials budget, the librarian was asked to explain the variance. If the increase in serials and books budgets together was greater than the materials budget, the librarian was asked from where the extra funding was drawn. If the cumulative effect of change in the serials and books budget was an increase less than the materials budget, how the surplus funds were allocated.

**10.1 How extra funds were acquired**

Typically librarians would acquire funding from suitable sponsors, or endowment funds. A number of librarians indicated that they would look to cut budgets elsewhere, typically they would reduce either, binding costs, the books budget, the number of expensive journals subscribed to, the building budget or finally IT costs.

**10.2 How surplus budget was allocated.**

Surplus funds were typically allocated to the purchasing of books, then journals, electronic materials and finally IT equipment, rarely does it go into salaries.

## 11 Major Reference Works

### 11.1 Major Reference Works change for 2008

- Librarians were asked whether the number of Major Reference Works (MRWs) to be purchased in 2008 would be greater, remain the same or be less than in 2007. 280 librarians were able to indicate what they thought the likely change would be and the percentage movement.
- Overall the number of **MRWs to be purchased in 2008** is set to **decrease by 0.1**. A decline is predicted in both Europe and North America, while a moderate increase is forecast in the Asia Pacific region.
- Only 7% of organisations thought that the number of major reference works purchased in 2008 would increase. The majority of organisations (86%) believe the number of purchases will remain static. Explanations as to why these changes may have occurred are listed in the next section.

		Qualitative Predictions			Quantitative Predictions
		% respondents predicting			
Region	Organisation	Increase	Static	Decrease	% Change
North America	Academic Top	5%	89%	5%	0.5
	Academic Middle	8%	69%	23%	0.8
	Academic Lower	0%	88%	13%	-1.6
	<i>All Academic</i>	4%	83%	13%	-0.1
	Medical/Health	24%	71%	6%	2.6
	Government	14%	71%	14%	-9.6
	Corporate	8%	92%	0%	0.8
	<b>Overall</b>	<b>10%</b>	<b>80%</b>	<b>10%</b>	<b>-0.9</b>
Europe	Academic Top	8%	92%	0%	0.5
	Academic Middle	0%	97%	3%	-3.3
	Academic Lower	0%	93%	7%	-0.4
	<i>All Academic</i>	2%	94%	4%	-1.2
	Medical/Health	0%	95%	5%	-0.1
	Government	0%	100%	0%	2.8
	Corporate	0%	100%	0%	0.0
	<b>Overall</b>	<b>1%</b>	<b>96%</b>	<b>3%</b>	<b>-0.4</b>
Asia Pacific	Academic Top	40%	60%	0%	1.5
	Academic Middle	0%	100%	0%	0.0
	Academic Lower	8%	77%	15%	0.3
	<i>All Academic</i>	10%	80%	10%	0.4
	Medical/Health	40%	40%	20%	2.2
	Government	33%	67%	0%	1.7
	Corporate	n/a	0%	0%	33.5
	<b>Overall</b>	<b>18%</b>	<b>73%</b>	<b>10%</b>	<b>2.0</b>
Overall	Academic Top	10%	88%	2%	0.6
	Academic Middle	2%	91%	8%	-1.7
	Academic Lower	3%	86%	11%	-0.4
	<i>All Academic</i>	5%	88%	8%	-0.5
	Medical/Health	14%	79%	7%	1.3
	Government	9%	85%	6%	-2.3
	Corporate	10%	90%	0%	2.6
	<b>Overall</b>	<b>7%</b>	<b>86%</b>	<b>6%</b>	<b>-0.1</b>

## 11.2 Why the number of MRWs is likely to change in 2008?

Librarians were asked why they thought there was a change in the amount of MRWs that were purchased from the previous year. The main reasons for drops seen to concentrate around a lack of demand and the expensive nature of MRWs.

**Increases:** The below comments are for those incidences were the librarian indicated that the numbers of MRWs will likely increase in 2008

### Increase in demand/need to keep up-to-date

"Need to update the major reference works.", Area:(North America) Org:(Medical/Health)

"New publication coming out and demand of users.", Area:(Asia Pacific) Org:(Academic lower)

"Periodically search for updated editions, and purchase them if available. We are currently in that process now.", Area:(Asia Pacific) Org:(Corporate)

"Revised versions are being prepared.", Area:(Asia Pacific) Org:(Medical/Health)

"There are more and more literature resources now. But the fund for operation is not enough to satisfy our demand for purchasing new books.", Area:(Asia Pacific) Org:(Academic top)

### Transfer to electronic

"People are using them more online.", Area:(North America) Org:(Medical/Health)

"They are moving in the direction of electronic major reference works and they are more expensive.", Area:(North America) Org:(Government)

"They did not buy anything this current year and they needed a few things, especially in electronic form.", Area:(North America) Org:(Academic middle)

"They have not focused on this in recent years and now they have a little more funding to consider it.", Area:(Asia Pacific) Org:(Academic top)

"They intend to have more reference work online", Area:(Europe) Org:(Academic top)

"This is a special year and they have received additional funding from another source.", Area:(Asia Pacific) Org:(Medical/Health)

**Decreases/Static:** The below comments are for those incidences were the librarian believed that the number of MRWs purchased will decrease or remain static in 2008.

### Availability for free online

"Books are starting to be provided for free on the Internet, and there are plans to stop printing books in proportion to the increasing number of books online.", Area:(Asia Pacific) Org:(Academic lower)

### Budget Reductions

"Budget is getting tighter and cancellations. There is not as much money available.", Area:(North America) Org:(Academic middle)

"Resources will be applied where there appears to be more need.", Area:(Europe) Org:(Academic middle)

"budget, general trend", Area:(North America) Org:(Medical/Health)

"Cut-backs in the book purchasing budget and a rise in the price of periodicals (including electronic journals) are expected.", Area:(Asia Pacific) Org:(Academic lower)

"General budget cuts", Area:(Europe) Org:(Medical/Health)

### Effects of moving Online

"Electronic reference works have taken over.", Area:(North America) Org:(Academic lower)

"People are not showing any interest. internet more preferable", Area:(North America) Org:(Government)

"Prefers online access", Area:(North America) Org:(Government)

"We are trying to make a transition for their reference collection to electronic.", Area:(North America) Org:(Academic Top)

"Due to the availability of online resources", Area:(Europe) Org:(Academic middle)

"People are using more online resources. They use Google to find more resources.", Area:(North America) Org:(Academic top)

### Expense

"They are expensive and we do not buy many of them", Area:(North America) Org:(Academic lower)

"We will not purchase any. We do not need them. They are too expensive.", Area:(Europe) Org:(Academic

top)

"The cost in general, we can't afford it", Area:(North America) Org:(Academic lower)

#### Lack of Demand

"They are less in demand", Area:(Europe) Org:(Academic lower)

"They are less used", Area:(Europe) Org:(Academic lower)

"We are losing room, have less space and we have to be more selective.", Area:(North America) Org:(Academic middle)

"People just are not using them. They are expensive and some of the information does not fit the tastes of the users. Sometimes it's too much content.", Area:(Europe) Org:(Academic middle)

### 11.3 Average number of MRWs likely to be purchased by organisation type in 2008

When compared to previous years the overall number of MRW purchased has dropped, this drop is across all regions with Europe indicating relatively a small number of purchases.

Table 18. Expected number of MRW's in 2008		
Region	Institution	Avg no to be purchased
North America	Academic Top	19
	Academic Middle	24
	Academic Lower	12
	<i>All Academic</i>	18
	Medical/Health	23
	Government	4
	Corporate	15
	<b>Overall</b>	<b>16</b>
Europe	Academic Top	2
	Academic Middle	0
	Academic Lower	1
	<i>All Academic</i>	1
	Medical/Health	0
	Government	0
	Corporate	2
	<b>Overall</b>	<b>1</b>
Asia Pacific	Academic Top	13
	Academic Middle	35
	Academic Lower	38
	<i>All Academic</i>	34
	Medical/Health	20
	Government	32
	Corporate	6
	<b>Overall</b>	<b>31</b>
Overall	Academic Top	10
	Academic Middle	13
	Academic Lower	18
	<i>All Academic</i>	14
	Medical/Health	12
	Government	4
	Corporate	7
	<b>Overall</b>	<b>12</b>

#### 11.4 Major Reference Works formats being purchased

- 91% of organisations surveyed have purchased a MRW in one form or another.
- Print predominates as the format of choice (81%); the numbers purchasing online versions has increased since last year from 65% to 69% in 2007. A significant minority have purchased different MRWs in all three formats (25%)
- The variance in terms of online purchasing is most different between regions, most North American institutes (77%) and European institutes (75%) have purchased MRWs online, while in the Asia Pacific only 47% have.

**Table 19. Purchasing patterns for MRWs by region and organisation (up to current year)**

		% all respondents taking MRW			% respondents purchasing different MRW formats			
Region	Institution	MRW (any format)	None	Total	MRW Print	MRW CD ROM	MRW Online	All MRW Formats
North America	Academic Top	97%	3%	100%	97%	17%	92%	17%
	Academic Middle	100%	0%	100%	100%	15%	93%	15%
	Academic Lower	100%	0%	100%	100%	17%	100%	17%
	<i>All Academic</i>	99%	1%	100%	99%	16%	95%	16%
	Medical/Health	70%	30%	100%	55%	0%	45%	0%
	Government	89%	11%	100%	61%	6%	39%	6%
	Corporate	89%	11%	100%	79%	11%	63%	5%
	<b>Overall</b>	<b>93%</b>	<b>7%</b>	<b>100%</b>	<b>86%</b>	<b>12%</b>	<b>77%</b>	<b>11%</b>
Europe	Academic Top	93%	7%	100%	83%	53%	80%	50%
	Academic Middle	100%	0%	100%	88%	69%	91%	63%
	Academic Lower	94%	6%	100%	75%	61%	86%	47%
	<i>All Academic</i>	96%	4%	100%	82%	61%	86%	53%
	Medical/Health	88%	13%	100%	83%	46%	54%	29%
	Government	84%	16%	100%	79%	53%	68%	37%
	Corporate	90%	10%	100%	67%	57%	57%	33%
	<b>Overall</b>	<b>93%</b>	<b>7%</b>	<b>100%</b>	<b>80%</b>	<b>57%</b>	<b>75%</b>	<b>45%</b>
Asia Pacific	Academic Top	100%	0%	100%	73%	18%	100%	18%
	Academic Middle	90%	10%	100%	76%	31%	59%	24%
	Academic Lower	91%	9%	100%	80%	31%	46%	11%
	<i>All Academic</i>	92%	8%	100%	77%	29%	59%	17%
	Medical/Health	73%	27%	100%	73%	9%	27%	0%
	Government	60%	40%	100%	60%	20%	10%	0%
	Corporate	63%	38%	100%	63%	13%	13%	0%
	<b>Overall</b>	<b>85%</b>	<b>15%</b>	<b>100%</b>	<b>74%</b>	<b>25%</b>	<b>47%</b>	<b>13%</b>
Overall	Academic Top	96%	4%	100%	88%	31%	88%	30%
	Academic Middle	97%	3%	100%	88%	40%	81%	35%
	Academic Lower	95%	5%	100%	84%	38%	76%	26%
	<i>All Academic</i>	96%	4%	100%	86%	36%	81%	30%
	Medical/Health	78%	22%	100%	71%	22%	45%	13%
	Government	81%	19%	100%	68%	28%	45%	17%
	Corporate	85%	15%	100%	71%	31%	52%	17%
<b>Overall</b>	<b>91%</b>	<b>9%</b>	<b>100%</b>	<b>81%</b>	<b>33%</b>	<b>69%</b>	<b>25%</b>	

## 12 Inter-Library Loans

- One of the expected effects of the move from paper to electronic, whether it be journals or books, is to reduce the number of ILLs. However, the reality is often more complex than this, and increased electronic access can actually stimulate ILLs as is the case this year.
- The numbers of ILLs are forecast to **increase by 2.7%** (last year a 1.5% increase was forecast).
- In terms of qualitative predictions 41% estimate that their budget will increase, another 41% believe the number will remain static. While a minority 17% are predict a decrease.
- North America, as last year predicts the largest increase at 4.3% (2.9% last year), with corporate sector accounting for the greater proportion of these increases.
- Overall the corporate libraries forecast the greatest increase overall of 5.6%.
- As in previous years librarians were asked why they believed ILLs were likely to increase or decrease. Increases are due in large measure to cuts in the serial or books budget. Some anticipate a rise as a result of increased electronic access to titles that are not in the library. Some librarians simply find ILLs a cost effective way of accessing the content of low usage or expensive journals. As in previous years for some institutes, as we would expect, increased electronic access has been the main reason given for decreases.
- Reasons for both increases and decreases can be seen in the next section.

		Qualitative Predictions			Quantitative Predictions
		% respondents predicting			
Region	Organisation	Decrease	Static	Increase	% Budget Change
North America	Academic Top	17%	40%	43%	3.6
	Academic Middle	8%	23%	69%	2.9
	Academic Lower	14%	25%	61%	1.4
	<i>All Academic</i>	13%	30%	57%	4.8
	Medical/Health	10%	35%	55%	3.0
	Government	11%	28%	61%	1.4
	Corporate	0%	32%	68%	6.5
	<b>Overall</b>	<b>11%</b>	<b>30%</b>	<b>59%</b>	<b>4.3</b>
Europe	Academic Top	34%	45%	21%	-2.5
	Academic Middle	35%	52%	13%	-3.7
	Academic Lower	34%	43%	23%	1.5
	<i>All Academic</i>	35%	46%	19%	-1.4
	Medical/Health	29%	62%	10%	-1.3
	Government	0%	93%	7%	-0.3
	Corporate	0%	63%	38%	2.8
	<b>Overall</b>	<b>27%</b>	<b>55%</b>	<b>18%</b>	<b>-0.8</b>
Asia Pacific	Academic Top	20%	0%	80%	15.2
	Academic Middle	7%	41%	52%	6.7
	Academic Lower	6%	47%	47%	4.4
	<i>All Academic</i>	9%	38%	54%	6.9
	Medical/Health	11%	44%	44%	1.5
	Government	25%	25%	50%	-0.6
	Corporate	20%	40%	40%	12.8
	<b>Overall</b>	<b>11%</b>	<b>37%</b>	<b>52%</b>	<b>6.0</b>
Overall	Academic Top	25%	36%	39%	2.7
	Academic Middle	18%	39%	43%	2.4
	Academic Lower	19%	39%	42%	3.6
	<i>All Academic</i>	20%	38%	42%	3.0
	Medical/Health	18%	48%	34%	0.9
	Government	10%	50%	40%	0.4
	Corporate	3%	45%	53%	5.6
	<b>Overall</b>	<b>17%</b>	<b>42%</b>	<b>42%</b>	<b>2.7</b>

## 12.1 Comments made by Librarians regarding Inter-Library Loans

Librarians were asked why they thought the number of Inter-Library loans would change. Below are some of the comments made by librarians who predicted the number of loans would **increase**.

### Increased demand

'1. The research potentiality of the university is so high that it becomes difficult to procure each and every documents demanded by the users and the demand has to be met by inter library. 2. Budgetary contracts is always a major concern.', Area:Asia Pacific Org:Academic top)

'a non-mediated service, so students have much control over (very easy program)', Area:Asia Pacific Org:Academic lower)

'Access to more consortia', Area:North America Org:Academic middle)

'As the number of missions in providing education Increases, the current resources are inadequate. Under a situation where capital is limited, we have to seek for cooperation with other libraries.', Area:Asia Pacific Org:Medical/Health)

'Awareness of users has increased. Due to lower budgets less new titles/ subscriptions.', Area:Europe Org:Academic lower)

'Due to student usage, they have more access to indexing online.', Area:North America Org:Academic middle)

'Due to the Increase in the number of projects.', Area:North America Org:Government)

'Have a new area for research resources. The library catalogue can't catch up that fast. ', Area:Asia Pacific Org:Government)

'More people are gaining awareness of inter library loans, especially being able to do it electronically.', Area:North America Org:Medical/Health)

'More people are using the resources.', Area:North America Org:Academic middle)

'Students are becoming more familiar with the process and they request more. Faculty are in engaged in research and they order information for them.', Area:North America Org:Academic lower)

'Students are doing more research, enrollment is growing and the use of library print is decreasing.', Area:North America Org:Academic lower)

'There is a strong demand for interlibrary loan services.', Area:North America Org:Academic lower)

### Difficulty making new purchases

'Budget Constraints. It's more economical to get resources through other libraries.', Area:North America Org:Corporate)

'budget got smaller', Area:North America Org:Corporate)

'budgets remain the same, costs rise, fewer journals and books can be acquires. Students have to rely on inter library loans.', Area:Europe Org:Academic lower)

'Decrease in purchasing due to the shrinking budget leads to use from other libraries', Area:Asia Pacific Org:Academic lower)

'many electronic subscriptions will be dropped', Area:North America Org:Government)

### Cheaper Alternative

'Because it is cheaper to buy what we need from someone else rather than purchasing a subscription.', Area:North America Org:Academic middle)

'Because the foreign serials budget will be reduced, this makes people not to subscribe any more.', Area:Asia Pacific Org:Academic middle)

'Had to cancel a number of important subscriptions and still need to access information published in them.', Area:Europe Org:Corporate)

'Journals are limited in scope, book budget is strained, people looking outside for books and resources', Area:North America Org:Academic middle)

'Limited resources, teachers' demand for having digital resources also increased.', Area:Asia Pacific Org:Academic middle)

'Under the situation where the prices of both books and journals increase, the amount of resources available also decreases. To supplement the inadequacy in this area, we have to seek for cooperation among libraries.', Area:Asia Pacific Org:Academic middle)

### Electronic Access

'Due to the increase in the use of electronic holdings.', Area:North America Org:Academic lower)

'Due to the increase in the use of electronic resources.', Area:North America Org:Academic lower)

'Due to the use of more electronic information resources', Area:North America Org:Academic middle)  
 'easier access', Area:Europe Org:Medical/Health)  
 'Easier access for everyone via the internet (from wherever you are)', Area:Europe Org:Corporate)  
 'Easier access, more available', Area:Europe Org:Academic top)  
 'Electronic databases are making titles more accessible.', Area:North America Org:Academic lower)

#### **Different Approach**

'Intra-university sharing and storage is becoming more common, and there is a increasing trend of requesting material from other libraries.', Area:Asia Pacific Org:Academic lower)  
 'It has been the pattern.', Area:North America Org:Government)  
 'It is not the ILL that Increase, but Subito, a service to get articles much faster', Area:Europe Org:Corporate)

Below are some of the comments made by librarians who predicted the number of loans would decrease.

#### **Electronic Access**

'Due to more online access.', (Area: North America, Org: Academic middle)  
 'Due to the availability of electronic journals.', (Area: Europe, Org: Medical/Health)  
 'Due to the cost of periodicals', (Area: Europe, Org: Medical/Health)  
 'Due to the use of more electronic services.', (Area: Europe, Org: Academic lower)  
 'Easier access to e resources', (Area: Europe, Org: Government)  
 'Easier access to e resources for users', (Area: Europe, Org: Academic middle)  
 'Easier access to e resources, especially through national licenses', (Area: Europe, Org: Academic lower)  
 'Easier to use', (Area: Europe, Org: Academic lower)  
 'Easier, direct access to information', (Area: Europe, Org: Academic lower)  
 'Electronic resources keep increasing and they are buying more backfiles and e-books.', (Area: North America, Org: Academic top)  
 'electronic resources more available and loans are expensive', (Area: Europe, Org: Academic top)  
 'They are moving toward more online journals and packages.', (Area: Europe, Org: Academic middle)  
 'They have access to more electronic journals.', (Area: Asia Pacific, Org: Academic lower)  
 'They have more access to electronic resources.', (Area: Europe, Org: Academic lower)  
 'They have more online journals.', (Area: North America, Org: Medical/Health)