Library Resource Guide

COMMUNITY PUBLIC LIBRARIES EDITION

LIBRARIES: AT THE EPICENTER OF THE DIGITAL DISRUPTION

THE LIBRARY RESOURCE GUIDE BENCHMARK STUDY ON 2013/14 LIBRARY SPENDING PLANS

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HIGHLIGHTS

With the economic recovery finally taking hold—albeit unevenly—across many parts of North America, public library systems are starting to see more financial support for programs and operations. However, this is no time to rest easy for many library managers. Spending is still tight, and libraries are encountering difficult choices as to how to invest their funding.

At the same time, there is no shortage of debate as to the purpose and mission of community public libraries in the age of the internet. How quickly should the migration from print books to ebooks be conducted without leaving some groups of patrons behind? Are libraries to function as community centers? As skills training centers? As tech hubs for residents? Many public libraries, in efforts to respond to their patrons' requests, must fulfill all these obligations, and as quickly as possible.

A new survey confirms that public libraries continue to move to digital at an accelerating pace, but still maintain strong investments in print collections. The study of 268 community public library managers and librarians was conducted by the Library Resource Guide (LRG)—in conjunction with Unisphere Research, the market research division of Information Today, Inc. (ITI). The survey, which was administered in April 2013 among libraries listed in ITI's American Library Directory, reveals current spending patterns for public libraries, and provides projections for budgets and spending trends for 2013 and 2014. This report is part of a larger study encompassing 796 libraries from across North America, which also includes community public, corporate and special libraries.

Among survey participants are directors, administrators, managers, department heads, and librarians from a wide range of public library settings. (For detailed demographic breakdowns, see Figures 42–45 at the end of this report.)

Public libraries covered in the survey represent a range of affiliations, structures, sizes and segments. More than two-fifths, 41%, are single, independent or standalone libraries, while another 13% are single facilities that are part of a larger multi-branch or multi-campus system. About 31% of respondents are reporting for entire campus library systems with multiple branches and facilities.

In terms of size, 28% represent communities with more than 100,000 residents, and another 32% have between 25,000 and 100,000 people. About 37% are from towns, cities or counties with fewer than 25,000 people.

Key findings from the survey include the following:

- Public library budgets are on the upswing, having perked up significantly after several years of an uncertain economy. Library managers are optimistic for the year ahead as well. The bulk of library budgets go to personnel and staffing. In terms of content acquisition, the lion's share still goes to printed material. While a small share is going to digital resources, this share has doubled over the past two years.

- While three-fourths of public libraries are seeing rising demand for electronic resources, demand for print is also resilient. Nine out of 10 respondents say they are seeing demand for ebooks, and ebook readers lead the way in purchasing intentions. There is also rising demand for libraries to function as technical training resource centers. One-fourth of public libraries now use cloud-computing services.

- Increasing the level of customer service continues to be public libraries' top priority, and a majority of respondents are now concentrating on providing ways for patrons to make use of the technology coming into the library space. However, these goals continue to clash with tight budgets, which makes selecting and maintaining platforms and skills an ongoing challenge.

The survey covers, in detail, the challenges faced by 21st century public libraries on two fronts: maintaining sustainable sources of funding, and tackling the digital age.

On the following pages are the results of the survey, documenting the trends, opportunities and challenges of managing today's libraries.

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PUBLIC LIBRARY FINANCES: A YEAR OF STRONG RECOVERY

Public library budgets are on the upswing, having perked up significantly after several years of an uncertain economy. Library managers are optimistic for the year ahead as well. The bulk of library budgets go to personnel and staffing. In terms of content acquisition, the lion's share still goes to printed material. While a small share is going to digital resources, this share has doubled over the past two years.

Survey respondents were asked about 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, 60% had a significant level of budget authority—close to two-fifths, 39%, report having direct budget authority, and another 21% influenced or made recommendations over library expenditures. (See Figure 1.)

Public library budgets have been climbing over the past three years, since the trough of the recession of 2007–2009. On average, about half, 49%, report having annual budgets exceeding $1 million, up from 47% a year ago and 44% in 2011, the first year this survey was published. At the very high end, the percentage reporting annual budgets exceeding $5 million has very slowly crept upward, with 19% now reporting budgets in this range. (See Figure 2.)

Respondents were asked to report their actual budget numbers for this year. Among respondents in standalone public community libraries, average budgets climbed more than 15%, with an average budget of about $1 million reported. Budget numbers are very similar for libraries that are tied into larger, multi-branch systems. (See Figure 3.)

In terms of the sizes of communities supported by these libraries, those respondents within larger municipalities (with populations exceeding 100,000 people) had average budgets exceeding $11 million. In contrast, respondents within smaller communities (with fewer than 25,000 people) reported budgets of less than half a million dollars. Notably, most of the budget growth is taking place in mid-size cities ranging between 25,000 and 100,000 residents. (See Figure 4.)

After several years of cutbacks and belt-tightening, there has been a notable resurgence in budget growth for community public libraries this year, the survey finds. More than two-fifths of respondents say their libraries have increased their budgets over the past year, surpassing the number affected by decreased budgets. Last year, the percentage of public libraries decreasing their budgets exceeded those reporting increases. Public library managers are optimistic for the year ahead as well—close to two-fifths expect continued budget increases, compared to only 16% anticipating decreases. (See Figure 5.)

In terms of community sizes (based on population), respondents in the smallest community libraries were most likely to have seen budget boosts. More than half of the libraries in communities with fewer than 25,000 people, 53%, report their budgets went up over the past year, compared to only 29% of libraries in larger cities. Across the board, however, a significant segment, roughly 40%, anticipate bigger budgets in the coming year. (See Figure 6.)

Last year saw a spike in the proportion of public library funding dedicated to personnel and staffing costs, and this remains the leading portion of budgets. More than half of the average budget reported in the survey, 56%, goes to personnel and staffing, followed by an average of 17% of budget going to operations and facilities, and an additional 16% invested in content acquisitions and collections development. (See Figure 7.) There is little distinction among the community size categories tracked in the survey, though it is notable that there is a greater share of budget within the smallest facilities going to operations and facilities. (See Figure 8.)

When drilling down into public libraries' content acquisitions budgets, a lion's share of annual budgets still goes to printed material. Close to two-thirds of public library acquisitions, 64%, is dedicated to the combined categories of printed books and other printed materials and serials and periodicals. This is down slightly from 69% a year ago and 70% in 2011. About 15% of budgets are dedicated to digital materials—including the two combined categories of online databases, digital content collections and ebooks. This is steadily climbing upward, however, up from 10% a year ago and 8% in 2011. (See Figure 9.)

The shift to digital is most apparent among the largest sites covered in the survey. Twenty-one percent of the budgets at libraries in communities of 100,000 and greater go to digital material, compared to an average of 9% of the budgets at the smallest institutions. (See Figure 10.)

Public library budgets may be on the upswing, but there are still areas where librarians have been trimming their spending. Overall, a total of 80% of respondents report they had to tighten their belts in one area or another over the past year, which is in line with the previous two surveys. The leading way in which public libraries have been cutting back is the phasing out of print subscriptions—the option employed by 41% of respondents, down from 46% a year ago, but in line with the first survey in 2011.

The second leading strategy seen at public libraries this past year has been to more aggressively seek more grant money—an activity undertaken at 38% of sites, also in line with previous surveys. Also, about a third, 34%, continue to report cutbacks in staff travel, but this is down significantly from 48% a year ago. (See Figure 11.) The need to make investments in technology is creating greater needs to secure more funding, says the director of a mid-size library in the South. "We are not receiving enough funding to meet this demand. We will need to look for other forms of funding to enhance library services in the future."

Across the size categories tracked in the survey, most of the pain continues to be felt at libraries within larger communities, the survey finds. For example, 52% of libraries serving constituencies greater than 100,000 report they have continued to curtail spending on employee travel and training, compared to only 21% of the smallest community libraries. In addition, close to half of the largest libraries, 45%. report ongoing salary freezes to staff, compared to only 26% of their smaller counterparts. It's likely that larger community libraries simply have more leeway to cut, while small, community libraries are already operating as lean as possible. (See Figure 12.)

Among areas seeing increased spending, public libraries continue to step up their purchase of ebooks, with more than half reporting increased spending on these resources. The surge in ebook spending began in earnest a year ago. Conversely, only a handful of libraries are spending more on print book acquisitions. More than one-fourth of respondents also report they have been increasing their staffing levels, reflecting the loosening in budgets seen in the past two years. Another area continuing to see a ramp-up in spending is digital content collections and services, at the same level as a year ago, but up from 2011. (See Figure 13.)

The increasing shift of spending from print to digital requires a difficult balancing act for libraries that have constituents seeking both formats. "Funding will probably remain steady, and we have to reallocate resources from print purchases to digital," says the administrator for a Midwestern city library. "I'm not sure what kind of tension that will cause, as we have a solid base of print users. Meeting everyone's desires for format is challenging!"

Across the size categories covered in the survey, ebook adoption is most pronounced among libraries in mid-sized and larger communities. Among sites serving 100,000 or more constituents, 63% report increases in ebook purchases. The trend toward increasing staffing is across the board, in large and small community libraries alike. Notably, the largest community libraries are seen more inclined than their smaller counterparts to be increasing spending on digital content and collections (26% versus 9%), online subscriptions (22% versus 5%), and cloud computing (15% versus 5%). (See Figure 14.)

A relatively new phenomenon entering the public library space, 3D printing, is prevalent among 4% of the largest city libraries, but virtually non-existent among smaller libraries. In fact, just recently, the Chicago Public Library opened a "maker lab"—with three 3D printers, two laser cutters, a milling machine and software—in one of its main locations. The 3D printing center was launched with a $250,000 grant, and the library may consider opening maker labs in additional locations.

Where do public libraries get their money? Not surprisingly, of course, the vast majority get their budgets from their local governments. However, this year's survey finds less reliance on direct local government funding, as respondents cite a variety of sources. There have been increases in the percentages of libraries relying on endowments, special fundraising events, and individual fee-based services. In fact, reliance on fee-based services as almost doubled since the first survey in this series was conducted in 2011. (See Figure 15.)

Federal and state or provincial government funding plays a key role for many community public libraries, and respondents report that government funding cutbacks have had an impact on their budgets. Close to two-thirds of the survey respondents, 65%, say they have suffered some degree of impact as a result of government support being withdrawn. (See Figure 16.)

Figure 1: Respondents' Roles in Public Library Management Budgets

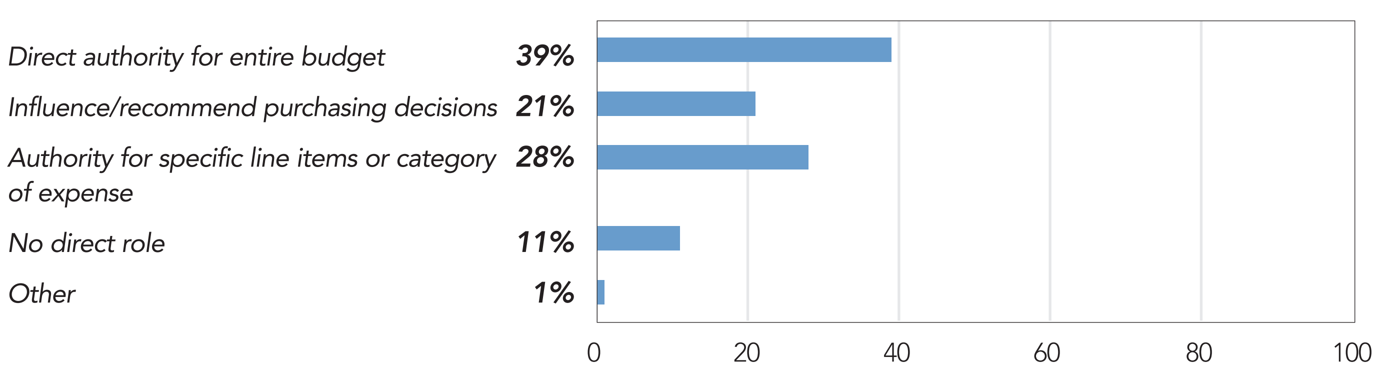

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Figure 2: Annual Public Library Budget Ranges

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

		2011		2012		2013
Less than $100,000		—		11%		10%
$100,000 to $500,000		36%*		25%		21%
$500,000 to $1,000,000		17%		11%		13%
$1 million to $3 million		21%		23%		20%
$3 million to $5 million	44%	6%	47%	6%	49%	10%
More than $5 million		17%		18%		19%
Don't know/unsure		4%		5%		7%

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

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

Figure 3: Public Library Budgets—By Library Structure

	2011	2012	2013	% CHANGE
Single independent pubic libraries	$744,974	$879,090	$1,015,060	+15.5%
Single library with/in multibranch, multi-location system	*	$881,070	$1,099,465	+25%

**2011 data on this category not available is not available due to a change in survey methodology.*

Figure 4: Public Library Budgets—By Population Size Served

	2012	2013	% CHANGE
<25,000	***$382,160***	***$435,000***	***+13.8%***
25,000 to 100,000	***$1,640,237***	***$2,361,180***	***+44.0%***
>100,000	***$12,788,614***	***$11,547,190***	***-9.7%***

Figure 5: Changes in Public Library Budgets

	2009–10	2010–11	2011–12	2012–13 (PROJECTED)
Increase	***37%***	***34%***	***43%***	***38%***
No change	***18%***	***22%***	***19%***	***29%***
Decrease	***43%***	***41%***	***30%***	***16%***
Don't know/unsure	***2%***	***3%***	***8%***	***17%***

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

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

	<25K	25K–100K	>100K
Increase 2010–2011	***40%***	***34%***	***36%***
Increase 2011–2012	***53%***	***46%***	***29%***
Increase 2012–2013 (projected)	***42%***	***37%***	***40%***

Figure 7: Allocation of Overall Public Library Budgets

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

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

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

	<25K	25K–100K	>100K
Personnel/staffing	***52%***	***59%***	***59%***
Content acquisitions/collection development	***16%***	***15%***	***19%***
Operations/facilities	***19%***	***16%***	***14%***
Library systems, computers, A/V, media equipment, software/svcs	***7%***	***7%***	***6%***
Other	***5%***	***3%***	***2%***

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

Figure 9: Allocation of Public Library Content Acquisitions Budgets

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

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

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

	<25K	25K–100K	>100K
Printed books & other printed materials	**64%**	**52%**	**50%**
Serials/periodicals (print)	**8%**	**7%**	**6%**
Online databases, digital content collections	**4%**	**13%**	**13%**
Ebooks	**5%**	**7%**	**8%**
Media titles (video, audio, computer-based modules, games, etc.)	**15%**	**13%**	**15%**
Special programs	**2%**	**3%**	**3%**
Other (microforms, manuscripts, archives, preservation, etc.	**1%**	**1%**	**3%**
All other categories	**2%**	**3%**	**3%**

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

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

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

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Cut spending on print subscriptions	***37%***	***44%***	***45%***
Applied for more grants	***42%***	***26%***	***45%***
Cut or eliminated conference/travel/education budget	***21%***	***41%***	***52%***
Salary freezes	***26%***	***32%***	***45%***
Reduced programming	***16%***	***29%***	***38%***
Staff layoffs/staff hours cut	***7%***	***24%***	***31%***
Added volunteers	***19%***	***32%***	***21%***
Renegotiated contracts with vendors	***14%***	***9%***	***34%***
Reduced library hours	***7%***	***9%***	***24%***
Collaborated/shared with other libraries/ joined consortia	***19%***	***15%***	***10%***
Lobbied for more funding from institutions	***23%***	***3%***	***17%***
Moved more services/materials online	***9%***	***9%***	***21%***
Consolidated departments	***2%***	***15%***	***14%***
Cut spending on online subscriptions	***7%***	***15%***	***34%***
Reduced IT expenditures	***16%***	***15%***	***31%***
Closed facilities	***0%***	***0%***	***7%***
Don't know/unsure	***2%***	***3%***	***3%***
Other	***6%***	***11%***	***3%***
No cuts/budget freezes over past year	***21%***	***18%***	***24%***

(Multiple responses permitted.)

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

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

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Ebooks	***37%***	***61%***	***63%***
Personnel	***33%***	***21%***	***30%***
Library technology equipment, software	***16%***	***27%***	***15%***
Digital content collections/services	***9%***	***15%***	***26%***
Facilities upgrades/maintenance	***16%***	***15%***	***15%***
Online subscription acquisitions	***5%***	***9%***	***22%***
Multimedia/streaming media	***0%***	***3%***	***7%***
Library hours/availability	***0%***	***3%***	***0%***
Book acquisitions	***12%***	***3%***	***7%***
Periodicals/serials acquisitions	***2%***	***0%***	***0%***
Cloud-based solutions	***5%***	***3%***	***15%***
Operations	***14%***	***3%***	***11%***
IT services	***12%***	***12%***	***11%***
Print subscription acquisitions	***0%***	***0%***	***0%***
Special career/business development	***2%***	***0%***	***4%***
3D printing facilities	***0%***	***3%***	***4%***
Don't know/unsure	***0%***	***0%***	***7%***
Other	***6%***	***6%***	***3%***
No areas seeing increased spending/support	***28%***	***24%***	***15%***

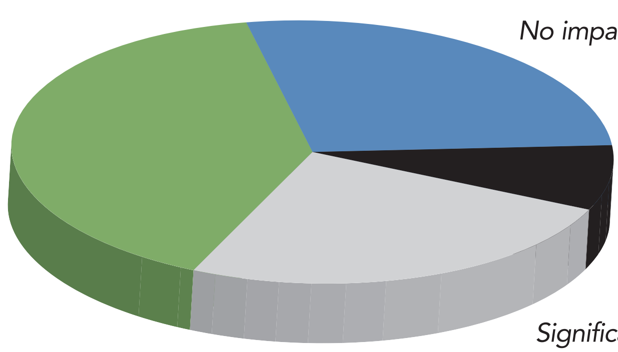
(Multiple responses permitted.)

Figure 15: Primary Sources of Public Library Funding

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

(Multiple responses permitted.)

Figure 16: Impact from Withdrawal of Federal or State Funding on Community Public Libraries



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LIBRARY TECHNOLOGIES AND SERVICES: EBOOKS AND CLOUD ON THE RISE

While three-fourths of public libraries are seeing rising demand for electronic resources, demand for print is also resilient. Nine out of 10 respondents say they are seeing demand for ebooks, and ebook readers lead the way in purchasing intentions. There is also rising demand for libraries to function as technical training resource centers. One-fourth of public libraries now use cloud-computing services.

The trend among public libraries to shift away from print in favor of digital continues to accelerate, the survey confirms. More than three fourths of respondents, 76%, report that demand for their libraries' electronic offerings has increased over the past year—exceeding last year's already fast pace. However, there has been an uptick in demand for print-based offerings as well—more than half, 58%, indicate they are seeing increased demand for print resources, up from 42% last year. (See Figure 17.)

One respondent, the director of a western Canadian library system, predicts that within five years, the library will be removing shelving to make more people space and to reflect the availability of electronic resources. "We have already reduced print reference collection to barely a couple of shelves," the respondent notes.

A number of respondents observe, however, that they need to continue to invest in print resources to address demand that will continue into the foreseeable future. "We are definitely caught in the 'sandwich' era," says a librarian with a large Midwestern city library system. "Most patrons will still need and want print sources. A select few will push hard for electronic ones. The problem will be funding both to their satisfaction."

There are difficult funding choices ahead "if budgets don't keep up with new demands," agrees the administrator of a smaller Northeastern library. "Many of our patrons still look for printed materials and will continue to do so while others will look for newer formats."

Another respondent, a department head with a large city library system, observes that "customers still want new, clean print books, and I can see the demand to improve our collection increasing."

Ebooks are the dominant resource in demand across public libraries this year. A total of 87% of respondents report that patrons have been requesting ebooks over the past year, up from 43% just two years ago—and now the leading technology category. Public libraries also continue to play a leading role as community access points for wireless connectivity, as indicated by 84%. (See Figure 18.)

Interestingly, there has also been a shift in the type of career information being requested by patrons—from job-search skills to specific technical skills. The percentage of respondents reporting demand for Job search/career development information has fallen from 76% to 59% since the first survey in 2011, but demand for technical information and training has risen from 41% to 50%. In a related trend, community public libraries are also becoming defacto study centers for students in online education programs or taking massive open online courses—31% report patrons are seeking help in this area.

"We'll see more demand for computer and internet access as people apply for jobs, take job training classes online, and attend school online," says the administrator of a small Southern library system. "I think the demand for ebooks and other digital collections will grow as the population ages, and users will want instant access to library collections on iPads, Kindles, etc. while wearing their jammies."

Demand for ebooks has been particularly strong at the largest communities in the survey—94% of respondents in areas with more than 100,000 people report such demand, versus 85% of the smallest sites. (See Figure 19.)

What percentage of public libraries' acquisitions budgets is spent on electronic resources? For the most part, very small portions of budgets go to technology-based acquisitions, though this amount continues to multiply. In this year's survey, only 9% of respondents now indicate a substantial portion of their budgets (more than 25%) are now for the purchasing of electronic resources, up from 2% two years ago. (See Figure 20.) This spending has been most pronounced at the largest sites—18% of respondents in communities of 100,000 or greater indicate that a significant share of their budgets go to electronic resources, versus 2% of the smallest facilities. (See Figure 21.)

Purchases of technology equipment and software at public libraries have strengthened over the past year, the survey finds. More than half of library managers in the survey indicate that their technology spending has been on the upswing—up from 42% in last year's survey and 33% two years ago. Spending plans for the year ahead are impressively robust—43% say they will be seeing increased spending on information technology, hardware, software, and related IT services. Barely a handful of public libraries foresee any actual declines in spending. (See Figure 22.)

While the past year's spending on IT resources has been most pronounced among the mid-size communities in the survey (25,000–100,000 residents), the largest community libraries (more than 100,000 people) have the most robust plans for the year ahead. (See Figure 23.)

Spending on technology equipment and software is on the upswing at public libraries, and there also is a growing surge in investment in online resources. About 28% respondents indicate that they are increasing their spending on online subscriptions, up from 18% two years ago. Close to one-third plan to be ramping up spending for online subscriptions in the year ahead as well. (See Figure 24.) Spending on online subscriptions will accelerate the most among libraries in large communities. (See Figure 25.)

As public libraries increasingly move more offerings and services into the digital realm, they are able to take advantage of a major source of disruption changing the very nature of computing itself—cloud computing. With the cloud computing model, libraries no longer need to purchase or maintain servers, software and databases on their premises—rather, they can pay a monthly subscription fee to a third-party provider, and conduct all transactions and inquiries over an internet connection. The survey confirms there has been a significant rise in public libraries' adoption of cloud computing. This year, 37% of respondents indicate they currently use cloud resources or are planning to do so. This is up from 33% last year and 16% in 2011. Close to one-fourth of community libraries currently use cloud resources to some degree, the survey finds. (See Figure 26.)

Adoption and planning for cloud computing is most pronounced among large community libraries in the survey. A total of 56% of respondents from communities with greater than 100,000 residents now have or are considering cloud—compared to 30% of the smallest sites. (See Figure 27.)

What types of cloud services are public libraries using? Four out of 10 facilities are turning to cloud-based solutions to manage IT-centric functions, such as storage and processing. Typically, the gateway to cloud for many institutions has been through the use of cloud-based communications services, such as email. This also continues to increase among libraries. Another 17% are also adopting cloud services to run their own internal business operations—a significant jump from last year, when 9% reported using such services. (See Figure 28.)

Along with cloud, what other types of information technology tools and platforms are now deployed at public libraries' sites? Online library catalogs and integrated library systems are ubiquitous within almost all public library systems, serving as electronic systems of record for collections and resources. Internet access for patrons, along with devices to access the internet, are a key service provided by most libraries. There has also been rapid growth in the numbers of ebook readers—used at 48% of libraries, up from 17% just two years ago. Audio and video teleconferencing has also gained a foothold at an increasing percentage of public libraries, up from 16% two years ago to 32% today. (See Figure 29.)

While these technology services are offered across the size ranges tracked in this survey, it's notable that smaller institutions are more inclined to offer ebook readers, while libraries in larger communities are more inclined to offer intranet-based services. Larger libraries are also more likely to offer web-scale management systems, offered by close to one-third, as well as new technology approaches such as RFID check-out systems. (See Figure 30.)

In terms of technology purchasing plans over the coming year, the most popular item on public library budgets is ebook readers, now planned for purchase by close to half of the respondents. PCs and other computing devices are also on the agendas of 43% of libraries, up from previous surveys. (See Figure 31.)

Eighty-eight percent of respondents indicate that their libraries are using or offering social media experiences in one form or another. Seven-tenths of respondents are using social networking services as part of their outreach to patrons—up eight percentage points from the first survey in 2011. Another area on the rise over the past three years is the effort to provide forums for patron reviews and ratings of library materials. There has been a doubling of sharing library web pages and subject guides (e.g., LibGuides), which has risen from 11% of public libraries in 2011 to 22% today. LibGuides are online directories of pre-selected resources such as databases, journals, books, and web pages. Adoption of other forms of social media is flat, indicating libraries are already seeing maximum value from these approaches. (See Figure 32.)

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

	ELECTRONIC			PRINT		
	2011	2012	2013	2011	2012	2013
Increase	*67%*	*71%*	*76%*	*67%*	*42%*	*58%*
No change	*15%*	*10%*	*13%*	*10%*	*19%*	*21%*
Decrease	*3%*	*2%*	*1%*	*14%*	*29%*	*16%*
Don't know/unsure	*15%*	*16%*	*10%*	*9%*	*9%*	*6%*

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

Figure 18: What Public Library Patrons Have Been Requesting

	2011	2012	2013
Ebooks	***43%***	***81%***	***87%***
Wireless access	***84%***	***83%***	***84%***
Computer/web access	***77%***	***69%***	***67%***
Job search/career development information	***76%***	***68%***	***59%***
Technical information/training	***41%***	***35%***	***50%***
Audiobooks	***64%***	***55%***	***47%***
Support for online education/massive open online courses	—	—	***31%***
Computer games/simulations	***26%***	***25%***	***25%***
Streaming media	***11%***	***21%***	***24%***
English language instruction	***22%***	***14%***	***20%***
Medical	***12%***	***11%***	***20%***
Primary and continuing education programs/requirements	***21%***	***19%***	***18%***
3D printing	—	—	***2%***
Don't know/unsure	***3%***	***3%***	***2%***
Other	***3%***	***0%***	***0%***

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Ebooks	85%	87%	94%
Wireless access	95%	82%	83%
Computer/web access	65%	67%	69%
Support for online education/massive open online courses	25%	35%	31%
Job search/career development information	50%	67%	63%
Audiobooks	52%	40%	51%
Technical information/training	52%	42%	57%
Computer games/simulations	22%	25%	23%
Streaming media	30%	12%	31%
Primary and continuing education programs/requirements	22%	12%	20%
English language instruction	10%	30%	23%
Medical	25%	10%	23%
3D printing	2%	2%	0%
Don't know/unsure	2%	2%	0%
Other	2%	0%	0%

(Multiple responses permitted.)

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

	2011	2012	2013
<10%	***57%***	***53%***	***46%***
11% to 25%	***22%***	***30%***	***27%***
26% to 50%	***2%***	***5%***	***7%***
>50%	***0%***	***0%***	***2%***
Don't know/unsure	***18%***	***12%***	***19%***

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

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

	<25K	25K–100K	100K+
<10%	***80%***	***35%***	***27%***
11% to 25%	***17%***	***41%***	***32%***
26% to 50%	***2%***	***5%***	***15%***
>50%	***0%***	***3%***	***3%***
Don't know/unsure	***0%***	***16%***	***24%***

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

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	2012–13 (PROJECTED)
Increase	***33%***	***42%***	***51%***	***43%***
No change	***33%***	***31%***	***29%***	***31%***
Decrease	***12%***	***11%***	***1%***	***5%***
Don't know/unsure	***22%***	***16%***	***20%***	***46%***

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

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

	<25K	25K–100K	100K+
Increased 2011–2012	***44%***	***67%***	***50%***
Increase 2012–2013 (projected)	***40%***	***39%***	***45%***

Figure 24: Changes in Public Library Spending on Online Subscriptions

	2009–10	2010–11	2011–12	2012–13 (PROJECTED)
Increase	***18%***	***22%***	***28%***	***31%***
No change	***43%***	***53%***	***48%***	***42%***
Decrease	***21%***	***13%***	***9%***	***9%***
Don't know/unsure	***18%***	***13%***	***14%***	***19%***

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

	<25K	25K–100K	100K+
Increased 2011–2012	***22%***	***18%***	***48%***
Increase 2012–2013 (projected)	***19%***	***27%***	***50%***

Figure 26: Access Cloud Computing Resources?

	2011	2012	2013
Planning or considering cloud resources	***12%***	***25%***	***23%***
Yes, currently use cloud resources	***4%***	***8%***	***14%***
No	***39%***	***38%***	***31%***
Don't know/unsure	***29%***	***29%***	***31%***

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

	<25K	25K–100K	100K+
Yes, currently use cloud resources	***10%***	***18%***	***21%***
Planning or considering cloud resources	***20%***	***24%***	***35%***
No	***46%***	***29%***	***18%***
Don't know/unsure	***24%***	***29%***	***26%***

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

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

	2011	2012	2013
IT infrastructure (online storage, processing)	***12%***	***29%***	***40%***
Communications (web conferencing, video, podcasting, email, collaboration)	***15%***	***35%***	***37%***
Specialized business applications (business, management, marketing, market research)	***8%***	***9%***	***17%***
Don't know/unsure	***76%***	***55%***	***46%***
Other	***3%***	***5%***	***7%***

(Multiple responses permitted.)

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

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

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Online library catalog/OPAC	**92%**	**100%**	**100%**
LAN/WAN/wireless network	**87%**	**92%**	**85%**
Integrated Library System (ILS)	**82%**	**84%**	**85%**
PCs/kiosks/laptops/mobile devices	**73%**	**82%**	**68%**
Intranet/extranet/website	**58%**	**58%**	**85%**
Ebook readers	**55%**	**47%**	**41%**
Web-based (IM or email) reference service	**21%**	**42%**	**68%**
Authentication solutions	**13%**	**34%**	**44%**
Audio/video teleconferencing	**26%**	**37%**	**35%**
Electronic Resource Management Systems	**8%**	**13%**	**15%**
RFID check-in/check-out, inventory control	**16%**	**26%**	**50%**
Link resolvers	**3%**	**5%**	**12%**
Discovery services	**5%**	**3%**	**18%**
Web-scale management system	**8%**	**8%**	**29%**
3D printers	**0%**	**3%**	**6%**
Other	**0%**	**0%**	**0%**

(Multiple responses permitted.)

Figure 31: Information Technology Tools and Platforms to Be Purchased by Public Libraries in the Coming Year

	2011	2012	2013
Ebook readers	***31%***	***46%***	***47%***
PCs/kiosks/laptops/mobile devices	***35%***	***41%***	***43%***
Integrated Library System (ILS)	***18%***	***22%***	***23%***
Intranet/extranet/website	***15%***	***13%***	***20%***
Online library catalog/OPAC	***20%***	***22%***	***19%***
RFID check-in/check-out, inventory control	***13%***	***15%***	***16%***
LAN/WAN/wireless network	***16%***	***13%***	***11%***
Authentication solutions	***5%***	***5%***	***11%***
Discovery services	***3%***	***3%***	***11%***
Audio/video teleconferencing	***10%***	***12%***	***10%***
Web-based (IM or email) reference service	***7%***	***6%***	***10%***
Electronic Resource Management Systems	***5%***	***2%***	***8%***
Link resolvers	***3%***	***1%***	***1%***
Other	***1%***	***11%***	***12%***

(Multiple responses permitted.)

Figure 32: Social Networking Services in Use at Public Libraries

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

(Multiple responses permitted.)

LIBRARY STRATEGIES: REDEFINE MISSION FOR THE DIGITAL AGE

Increasing customer service levels continues to be public libraries' top priority, and a majority of respondents are now concentrating on providing ways for patrons to make use of the technology coming into the library space. However, these goals continue to clash with tight budgets, which makes selecting and maintaining platforms and skills an ongoing challenge.

While anything technology-based is a key initiative for today's public libraries, a majority report they need to keep focusing on an old-fashioned value that never goes out of style—customer service. More than two-thirds of respondents say their library's top priority over the coming year is to improve and expand the state of their customer service. This is a priority for more libraries now than it was just two years ago, the survey shows. (See Figure 33.)

The growing movement to digital and online resources is also reflected in public libraries' strategic priorities. A majority, 52%, say they are expanding efforts to train and educate patrons in the use of various tools and services now offered—up from 44% just a year ago. In addition, close to half are focusing on initiatives to increase the availability of online publications and digital access, a priority that also has been on the rise.

Public libraries need to cater to the unique needs of their communities, an effort which often requires constant re-examinations of their missions. As one respondent, a manager of a smaller Western library, explains, "We are a young, immigrant-heavy community, so we expect continued growing demand for services to young children, families, students from kindergarten through college, and those in adult education classes. Because we serve all ages, those speaking many languages and from diverse ethnic groups and people at all levels of acculturation, we constantly outgrow our funding."

Tight budgets continue to be a leading challenge for most public libraries, but this is less intense than it was two years ago. About three-fourths of respondents report managing services with tight budgets to be problematic for their operations, but this percentage has been inching downward since the first survey in this series was launched in 2011. Another 75% also report they are challenged with keeping up with changes in information technology, up from 66% in the 2011 survey. Significantly, a majority of public librarians, 51%, say they are concerned with remaining relevant and offering more than public internet services now offer. This percentage is up from 34% just two years ago. (See Figure 34.)

These challenges are seen more frequently at the smaller community libraries in the survey. For example, while 82% of the respondents in communities with less than 25,000 people worry about budgets, this is a concern among 69% of those in the largest libraries. A similar proportion of smaller community librarians are also concerned with their ability to compete with the internet. (See Figure 35.)

About half of community public library managers and proponents, 47%, are actively working to identify the mission their facilities will pursue in the years ahead. This percentage is about the same as in previous surveys. (See Figure 36.) Strategic plans are most often seen at libraries in smaller communities. (See Figure 37.)

A common strategy for many public libraries is to pool their resources and purchases from consortia and networks. Close to half of the respondents (49%) indicate they belong to at least one or two consortia. (See Figure 38.) However, only 17% of respondents indicate that the level of support they are seeing from their consortia is on the increase—a sharp decline from previous surveys. (See Figure 39.)

Figure 33: Public Libraries' Priorities for the Coming Year

	2011	2012	2013
Improve/expand customer service	***59%***	***64%***	***68%***
Provide assistance/education on inf. access tools/svcs	***40%***	***44%***	***52%***
Increase availability of online pubs/digital access	***30%***	***39%***	***49%***
Identify and reach out to new groups of patrons	***43%***	***49%***	***46%***
Drive usage of current resources	***36%***	***38%***	***40%***
Enhance discovery of collections	***34%***	***32%***	***40%***
Repurpose physical space	***30%***	***31%***	***39%***
Institute special programs for constituents/patrons	***27%***	***29%***	***33%***
Physical expansion/upgrade of facilities	***22%***	***21%***	***27%***
Develop unique library collections	***11%***	***16%***	***17%***
Join or increase participation in consortium/network	***14%***	***18%***	***16%***
Enhancing user workflow tools	***17%***	***5%***	***15%***
Don't know/unsure	***4%***	***4%***	***5%***
Other	***4%***	***4%***	***4%***

(Multiple responses permitted.)

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

	2011	2012	2013
Maintaining services with tight budgets	***87%***	***82%***	***78%***
Keeping up with changes in information technology	***66%***	***73%***	***75%***
Identifying new sources of funding	***54%***	***52%***	***58%***
Competing/keeping up with public online svcs/offerings	***34%***	***45%***	***51%***
Finding and retaining knowledgeable staff	***39%***	***38%***	***46%***
Keeping facilities open/at preferred operational levels	***49%***	***43%***	***35%***
Migrating print content to digital formats	***18%***	***23%***	***27%***
Other	***4%***	***1%***	***3%***

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Maintaining services with tight budgets	***82%***	***77%***	***69%***
Keeping up with changes in information technology	***82%***	***72%***	***71%***
Identifying new sources of funding	***62%***	***52%***	***51%***
Competing/keeping up with public online svcs/offerings	***47%***	***52%***	***51%***
Migrating print content to digital formats	***20%***	***17%***	***49%***
Finding and retaining knowledgeable staff	***27%***	***45%***	***66%***
Keeping facilities open/at preferred operational levels	***22%***	***37%***	***40%***
Other	***7%***	***5%***	***0%***

Figure 36: Public Library Have Strategic Plan?

	2011	2012	2013
Yes	***46%***	***45%***	***47%***
Under development	***22%***	***29%***	***24%***
Under consideration	***15%***	***11%***	***16%***
No	***10%***	***12%***	***5%***
Don't know/unsure	***6%***	***3%***	***9%***

(Multiple responses permitted.)

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

	<25K	25K–100K	100K+
Yes	***51%***	***42%***	***43%***
Under development	***15%***	***30%***	***34%***
Under consideration	***17%***	***15%***	***17%***
No	***10%***	***5%***	***3%***
Don't know/unsure	***7%***	***7%***	***3%***

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

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

	2011	2012	2013
None	*10%*	*11%*	*13%*
One	*38%*	*42%*	*36%*
Two	*22%*	*24%*	*20%*
Three	*11%*	*7%*	*13%*
Four	*2%*	*3%*	*1%*
Five	*0%*	*0%*	*1%*
>5	*1%*	*2%*	*6%*
Don't know/unsure	*14%*	*11%*	*11%*

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

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

	2011	2012	2013
Increased	*24%*	*28%*	*17%*
Decreased	*36%*	*21%*	*20%*
No change	*16%*	*39%*	*46%*
Don't know/unsure	*22%*	*13%*	*17%*

DEMOGRAPHICS

Figure 40: Respondents' Titles

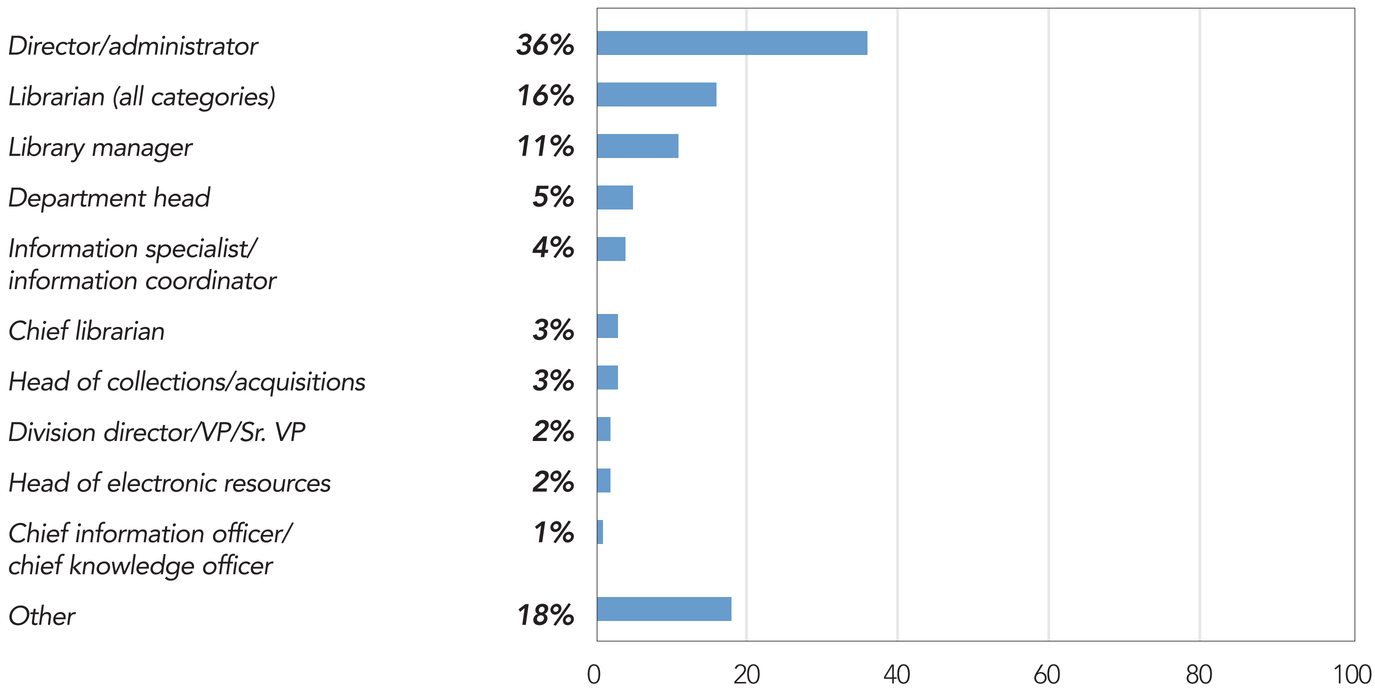
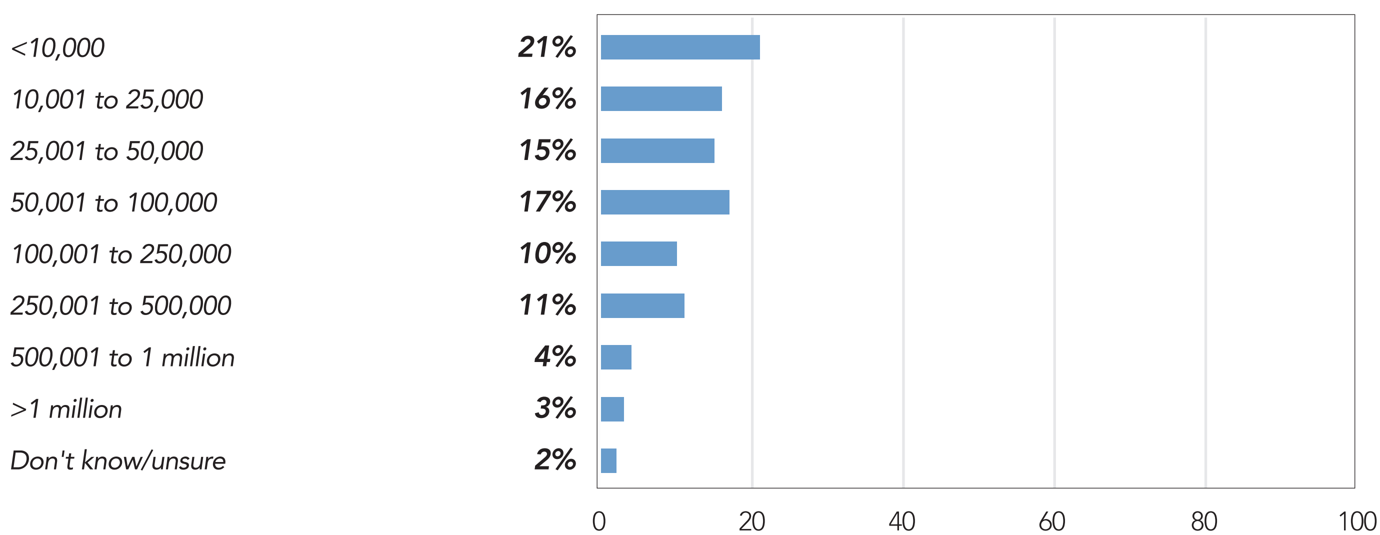
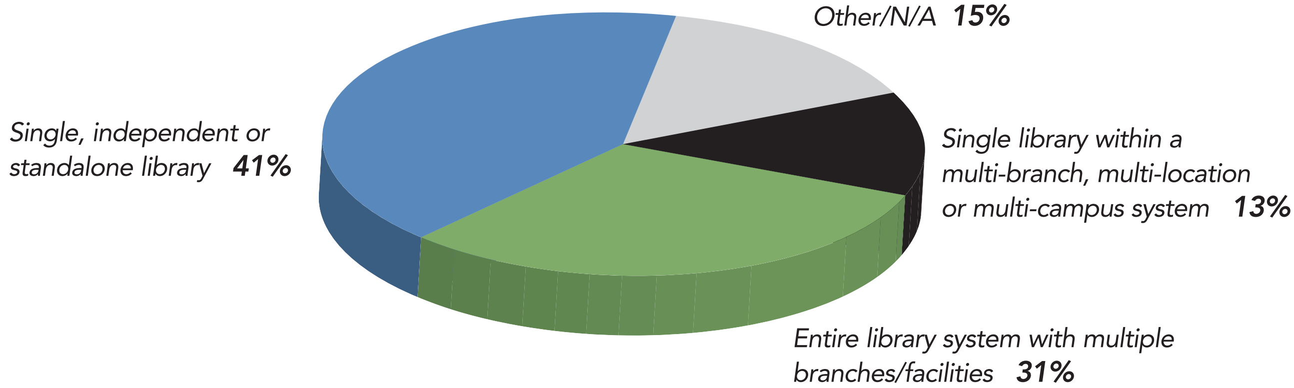


Figure 41: Size of Community Population Served



COMMUNITY PUBLIC LIBRARIES EDITION Libraries: At the Epicenter of the Digital Disruption—The Library Resource Guide Benchmark Study on 2013/14 Library Spending Plans was produced by Unisphere Research and sponsored by ProQuest. Unisphere Research is a division of Information Today, Inc. Unisphere Media, 630 Central Avenue, Murray Hill, New Providence, NJ 07974; 908-795-3701. http://www.infotoday.com.

Figure 42: Type of Library Infrastructures Surveyed



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 March 15, 2013, and April 30, 2013. 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 796 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. Since 2004, Unisphere has completed close to 100 sponsored research reports in the information technology market and has worked with leading IT industry sponsors, including Oracle, IBM, SAP, Symantec, Teradata, Informatica, VMware, Tableau Software, MarkLogic, 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.

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