

Spotlight: the Covid-19 library

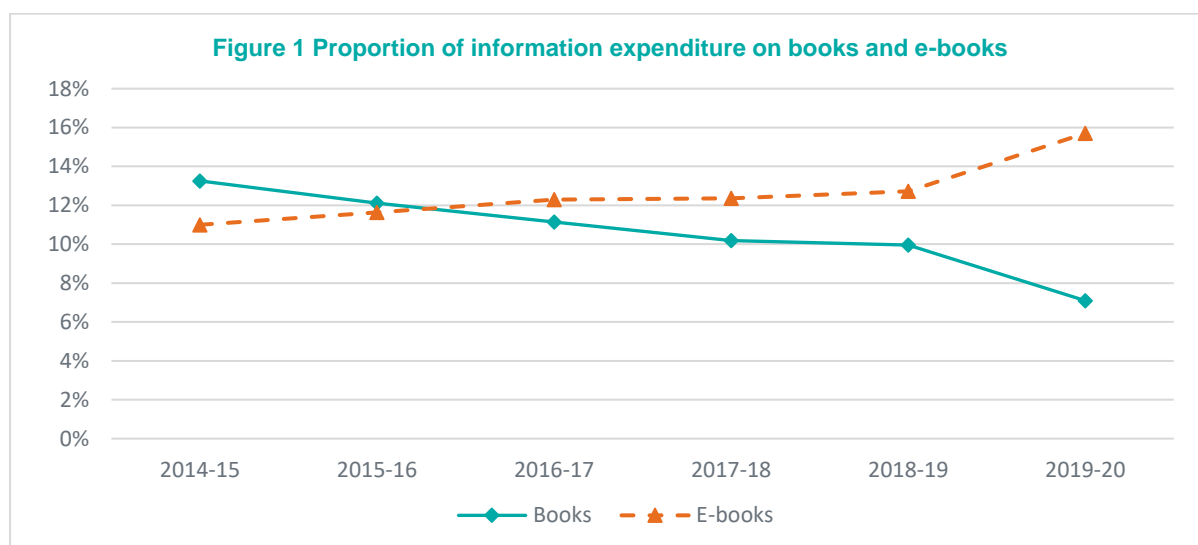
Prior to 31 December 2019, if you had asked academic librarians what they expected their biggest challenges to be during the coming year, the impact of Brexit and the ever-increasing cost of content would no doubt have been top of the list. However, as a result of the Covid-19 pandemic, 2020 proved to be a year like no other, and HE institutions throughout the world were forced to quickly adapt to an entirely online presence, with staff largely working from home and students unable to attend campuses. Academic libraries were at the forefront of these changes ensuring that both staff and students were able to access resources remotely as well as continuing to receive any relevant training – albeit virtually.

It should be noted that the overall experiences of individual institutions throughout the pandemic have varied, and the extent of the challenges they face will largely be influenced by the strength of their online presence pre-Covid. With this in mind, this report for the 2019-20 SCONUL Annual Statistics looks at the impact of the Covid-19 pandemic on the UK HE sector and considers how this may shape the academic libraries of the future.

Key findings

- Average³ unique loans per FTE student decreased from 8.8 in 2018-19 to 5.8 in 2019-20; while average visits per FTE user⁴ dropped from 61 in 2018-19 to 37 in 2019-20
- In 2019-20, 15.7% of information provision expenditure was accounted for by e-books – compared to 12.7% in 2018-19
- In 2019-20, 7.1% of information provision expenditure was accounted for by print books (including special collections) – compared to 9.9% in 2018-19

Information provision expenditure

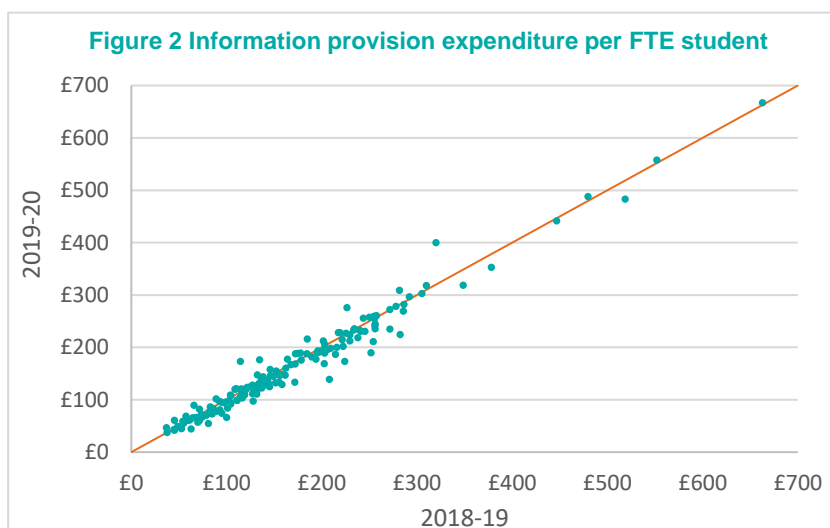


³ Note that the averages given throughout the report are the weighted averages of all institutions included

⁴ Throughout this report FTE users are calculated as FTE students + FTE academic staff

The announcement of an enforced lockdown in March 2020 resulted in institutions in the UK HE sector adjusting their budgets to meet the demands of fully online provision. For more than ten years there has been a gradual shift away from print resources and an increasing emphasis on e-resources, with Figure 1 highlighting that a larger proportion of the information provision budget has been spent on e-books than print books, on average, since 2016-17. In 2018-19 this seemed to have levelled out somewhat, with 9.9% of information provision expenditure accounted for by print books and 12.7% accounted for by e-books – only a slight change on the 10.2% and 12.4% reported respectively in 2017-18. However, the need for fully online delivery of resources in response to the pandemic appears to have accelerated the digital shift, with 15.7% of information provision expenditure accounted for by e-books in 2019-20 – more than double the 7.1% accounted for by print books. It should also be noted that the UK government fast-tracked the removal of VAT on e-books in response to the pandemic, and this may also have had an impact on e-book budgets in 2019-20 as well as for future years.

Several institutions have reported an increase in their overall information provision budget in response to the pandemic; however, Figure 2 illustrates that this is not the case for all institutions, with the increase in e-book expenditure often arising as a result of saving money within other areas of the overall



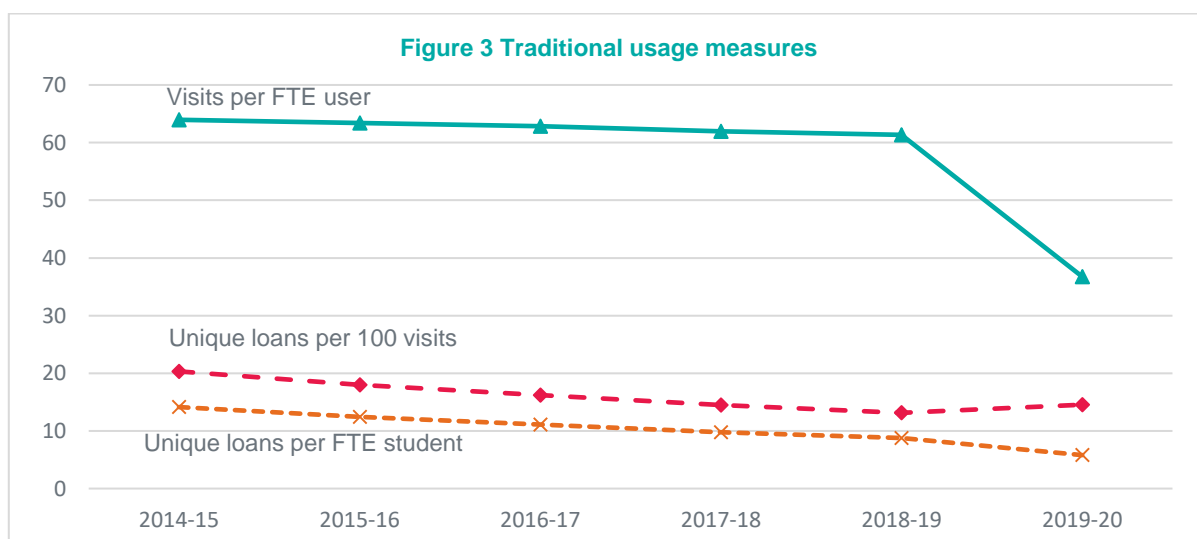
budget rather than additional funding. Figure 2 compares total information provision expenditure per FTE student in 2018-19 and 2019-20 (including estimates for non-respondents) and shows that just over one-third of institutions spent more per FTE student in 2019-20 than in 2018-19 (and therefore lie above the line of equality in Figure 2). Overall, fourteen respondents (8.8%) reported an increase of more than ten percent in information provision expenditure per FTE student in 2019-20, with five of these recording increases of 25% or more. It should be noted that three institutions with information provision expenditure per FTE student of more than £1,000 in 2019-20 have been removed from Figure 2 for clarity.

Traditional usage

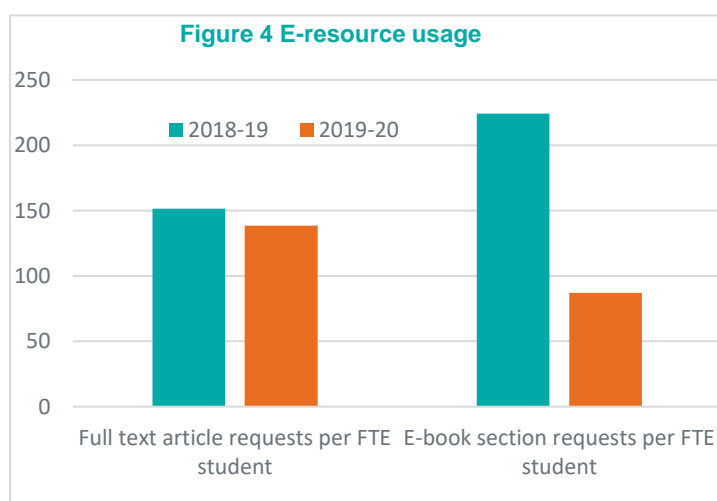
As would be expected, the nationwide lockdown in March 2020 has resulted in declines in more traditional library usage figures such as footfall and loans. Figure 3 shows that the average number of visits per FTE user remained relatively stable between 2014-15 and 2018-19, while the most recent year has seen the average fall from 61 to 37 – a decrease of

40%. Further to this, the average number of unique loans per FTE student decreased steadily between 2014-15 and 2018-19, with a decrease of 34% in 2019-20, so that it currently stands at almost six loans per FTE student – compared to an average of just over fourteen loans per FTE student in 2014-15.

However, it is notable that when we consider the average number of unique loans per 100 visits, the steady decline between 2014-15 and 2018-19 appears to have halted, with an increase of 10.6% in the most recent year, so that there were more than fourteen unique loans per 100 visits to library premises in 2019-20 – compared to an average of 13.1 in 2018-19. When we consider that the enforced lockdown ensured that libraries were closed during one of their busiest periods, it will be interesting to see how the traditional usage figures fare in the future.



E-resource usage



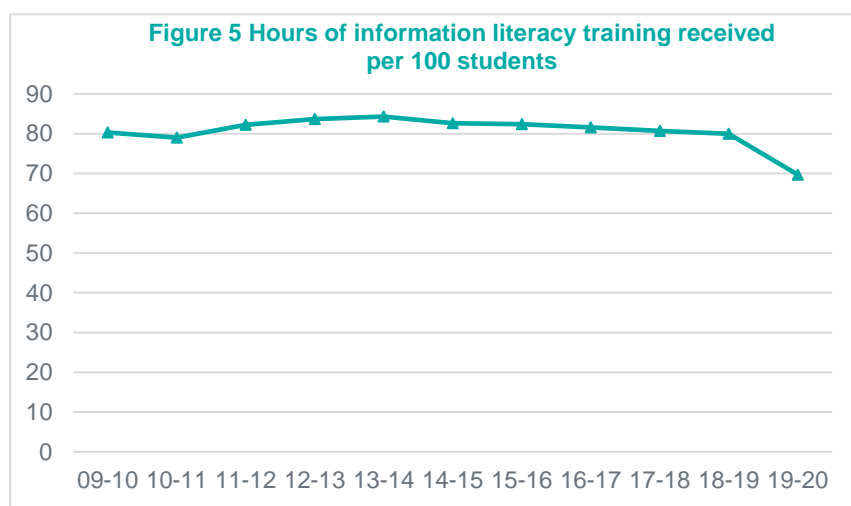
E-resource usage figures have been inconsistent for some time, particularly those for e-books, where the definition of a section request varies from publisher to publisher making it difficult to make any comparisons. COUNTER Release 5 aims to remove these inconsistencies and provide more reliable and meaningful usage data; however, it has resulted in e-book usage data essentially being reset and any comparisons with

previous years are meaningless. Figure 4 highlights this and shows that out of the 138 respondents providing data in 2018-19, the average was 224 e-book section requests per FTE student – compared to an average of 87 e-book section requests per FTE student in

2019-20 (138 respondents). It is worth noting that the basis for the 2019-20 data varies by institution, however, it is generally a combination of both COUNTER Release 4 and Release 5 data with not all publishers or suppliers completing the move to Release 5 for the 2019-20 academic year.

Figure 4 also illustrates that the average number of full text article requests per FTE student has also decreased in 2019-20 – from 152 (142 respondents) in 2018-19 to 138 (141 respondents) in the most recent year. The change to COUNTER Release 5 was not expected to have a significant impact on the full text article requests data, although it is possible that it may have contributed to the slight decrease that has been recorded, along with the removal of barriers to resources by some publishers or suppliers in response to the Covid-19 pandemic.

Training



Undoubtedly the Covid-19 pandemic will have impacted on the level of digital/information literacy training provided by academic libraries, as they shifted the emphasis to online provision to meet the level of demand from users. Figure 5 illustrates the trend in the number of hours of digital/information literacy training received

per 100 students over the last ten years. It is not surprising that the most recent year has recorded a decrease, of 12.9%; however, given the challenges that libraries have faced over the last year, it is perhaps surprising that the decrease was not more marked. It should also be noted that, at present, the data collected by SCONUL only covers synchronous pre-arranged sessions, and therefore does not make allowance for the increase in asynchronous training sessions following the move to online training.

Conclusion

At the time of writing last year’s report, the full scale of the pandemic, and the extent to which HE institutions in the UK would be closed to both staff and students could not have been anticipated. A year on and we are still no clearer as to when things will return to ‘normal’, or even what the new ‘normal’ will entail. While much of the SCONUL data is incomparable to previous years as a result of the pandemic, the accelerated digital shift is notable, and it will be interesting to see if this is sustained in future years.

At present, with the pandemic ongoing, there are more questions than answers such as:

- What are the long-term financial implications of both Covid-19 and Brexit to the HE sector, and how will this impact on library budgets?
- Will users once again return to library buildings as they did previously, or will remote learning and access become more common?
- Will those library buildings designed with an emphasis on collaborative learning be sustainable post-Covid, or will social distancing no longer be a concern?

It is likely to be some time before we begin to have answers to these questions, and the challenges they pose to the sector; however, as shown previously, and throughout the pandemic, academic libraries will undoubtedly once again show their resilience and adaptability in the face of adversity.

Informal groupings of institutions used for summary data

SCONUL's higher education members vary considerably in both size and character. As an aid to the interpretation of these statistics, libraries have been divided into four informal groups, which tend to have many characteristics in common. These are:

'RLUK' UK members of Research Libraries UK (except for the National Library of Scotland)

'Old' Those universities founded or chartered before the Education Reform Act 1992, excluding RLUK members.

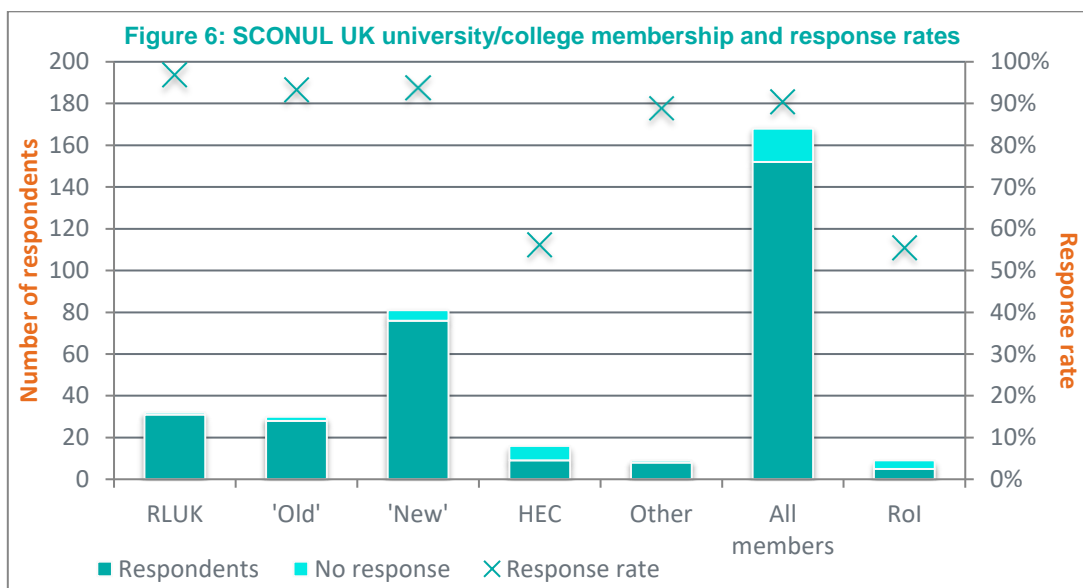
'New' Universities incorporated in 1992 or subsequently. These include the former polytechnics, and some former HE colleges.

HEC Higher education colleges which do not have formal university status. These are primarily small institutions, each specialising in a narrow range of subjects, although the set of subjects covered is diverse.

Membership of these groups changes from year to year, as institutions merge, HE colleges gain university status, and new members join RLUK. Institutions are included in the group to which they belonged for the majority of the year to which the statistics relate. A small number of members fall outside these groups; in particular independent institutions which do not report to the Higher Education Statistics Agency (HESA), non-academic organisations and the Open University. Their data are included in the overall totals, however.

Information on the mission groups (Russell Group, University Alliance, MillionPlus, GuildHE, Cathedrals Group, Conservatoires UK) to which institutions belong are also included in the survey.

Response rate



The UK response by institution type is illustrated in Figure 6. The compilers are grateful to the many institutions which provided statistics and spent time answering queries.

HESA data

Data for FTE students and FTE academic staff in the UK were obtained from HESA wherever possible. Their definitions are given on page 116. Data for other institutional employees (FTE) and registered external users (actual numbers) were obtained directly from respondents. In order to calculate a figure for total FTE users, the number of registered external users has been scaled by a factor of 40% to approximate to FTE use.

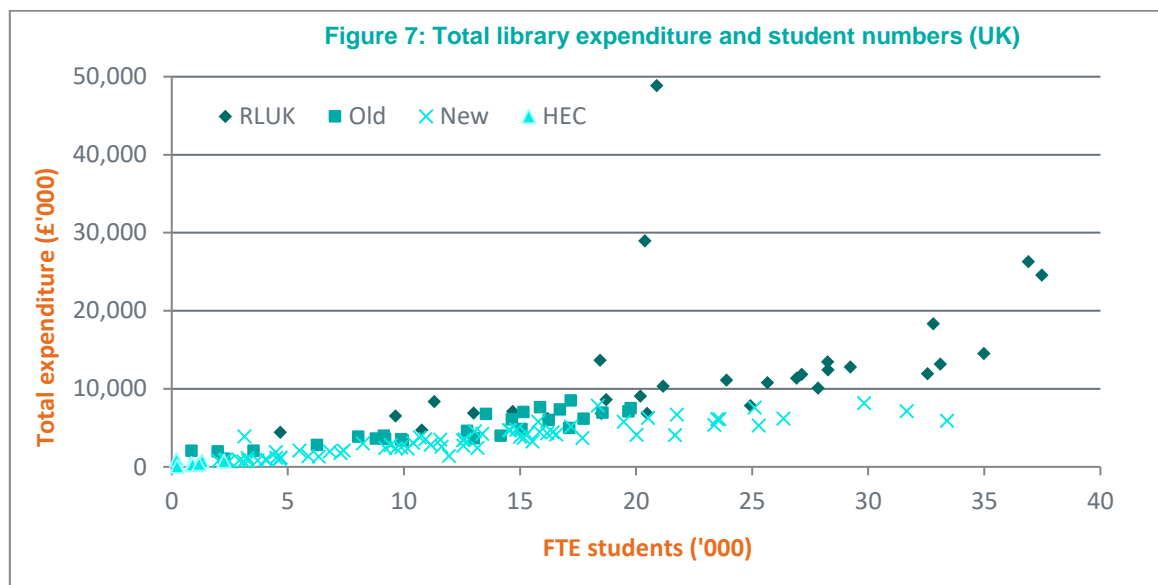
Please note that data for FTE students and FTE academic staff complies with the HESA Services Standard Rounding Methodology (<https://www.hesa.ac.uk/about/regulation/data-protection/rounding-and-suppression-anonymise-statistics>). Any FTE student and FTE academic staff data obtained from individual institutions has also been rounded using the same methodology for consistency.

Accuracy

Over recent years, respondents have made efforts to improve the quality of data returned, and each year there are fewer gaps and less data identified as not conforming to the definitions. There is also increased consistency over the distinction between “not applicable” (*the activity concerned is not performed at the institution*), “not known” (*the activity does occur, but is not counted or analysed in such a way as to provide a figure*) and “nil” (*the count is zero for the year in question*); however, there may still be a few instances where *n/a* has been entered instead of *n/k*, and vice versa. There may also be a few cases where respondents have entered *n/k*, but the relevant information is included in another column. Respondents are encouraged to mark any such combined data entries clearly. Figures which are known not to conform to the standard definitions are indicated by the use of italics in the data tables. In some instances, explanatory notes have been included, and readers should refer to these to aid interpretation.

There remain some problem areas, most notably concerning the provision and use of electronic resources, and in particular the transition from COUNTER Release 4 to Release 5, and users of the statistics are recommended to read the notes to the returns (*pp 75-113*) in conjunction with the figures, to aid interpretation.

Financial summary



The range of expenditure levels, and their close relationship with student numbers, is shown in Figure 7. A summary of the main financial figures has been included before the main data tables (*pp 11-14*). This shows both actual expenditure and expenditure per FTE student for the main heads of staff, information provision, equipment, and other operating expenditure. The 144 UK HE members which provided full details for this summary spent almost £800 million in total, an average of £387 per FTE student.

Strategic Planning Set

The data collected in the Strategic Planning Set are included between the summary of the main financial data and the main data tables (*pp 15-26*). These tables present the most recent available data and so may vary from those in the Strategic Planning Set tables originally released in December 2020. Additional derived ratios are also included within this data set – not all of which are repeated within the derived ratios section of the report.

Main data tables

The main data tables (*pp 27-54*) show the data as received from each institution. The data extend over four pages for each column. The list of institutions (*pp 75-113*) is given in the same order as the data and provides a key to the identifiers used, with all institution names given as of July 2020. All mandatory items from the questionnaire are shown, and columns are generally in the order of the questionnaire, although some slight changes have been made to facilitate presentation. A copy of the tables in excel format, including the optional questions, is also available. A copy of the full questionnaire, including the notes, optional questions and definitions, is included at Appendix B for reference (*pp 117-126*).

Entries in italics in the tables do not conform to the standard definitions for the column, either

because they include data which should properly be included in another column, or for some other reason, given in the notes to the tables (*pp 75-113*). Where figures relate to two or more columns, this is indicated within the body of the tables.

An extended set of summary statistics has also been included. Summary figures are given separately for each of the four major UK library groups – RLUK members (excluding Trinity College Dublin and the National Library of Scotland), other ‘old’ universities, ‘new’ universities and higher education colleges. The total for all UK respondents is also given. The mean, minimum and maximum have been supplemented with the upper and lower quartiles, for each group. These summary statistics include data which do not conform to the standard definitions, identified by the use of italics in the tables. An increasing number of non-academic institutions are submitting returns to SCONUL, and such institutions will not be included in the UK summary figures for those derived ratios calculated per FTE student.

Some relevant totals not included in the questionnaire have been included at appropriate points in the series. Detailed definitions for these columns are given in Appendix A (*page 114*). If a component of a calculated total has been marked *n/k* in the return, generally that total has not been included for that institution. Data on FTE students and academic staff, and total institutional expenditure have been obtained directly from HESA as far as possible.

Because of their different regulatory framework and currency, SCONUL members from the Irish Republic, have not been integrated into the alphabetical sequence of institutions, but are grouped together following the UK list. They are also not included in the UK members’ summary data. Separate summary statistics have been provided; however, these are limited and, in particular, means for the derived ratios have been calculated only where at least four of the responding members have provided data.

Derived statistics

The derived statistics follow the main data tables, starting on page 55. Full definitions for each are given in Appendix A (*pp 114-116*). Only those derived statistics based on mandatory questions are included here, the full set is included in the excel spreadsheet containing the optional questions. As for the totals in the main tables, if any component of a derived ratio has been marked *n/k* in the return, that ratio has not been calculated for that institution. The ratios have been divided into the following broad groups:

- Library provision and use (*pp 55-58*)
- Stock - provision (*pp 59-62*)
- Stock – expenditure and use (*pp 63-66*)
- Staff workload (*pp 63-70*)
- Financial ratios (*pp 67-74*)
- Electronic resources (*pp 71-74*)

Where source data items do not conform to the standard definitions, ratios have been included in the lines for individual institutions wherever possible and are shown in italics. Note that the averages given are the weighted averages of all institutions included, not the arithmetic average of the ratios shown.

SCONUL web database and the Statistical Reporting Tool

The 2019-20 statistics will be incorporated into the web database and uploaded to the Statistical Reporting Tool shortly after publication. SCONUL are grateful to those members who have taken the trouble to answer queries on their historic data and so improve the quality of the available data. The Statistical Reporting Tool is accessible to members on the SCONUL website.

If any institution becomes aware of errors in the published data, they are asked to send details directly to SCONUL so that corrections can be made in the database. Similarly, if any institution has previously unpublished data that they are prepared to have included in the historical database, they should contact SCONUL.

Specific analyses and investigations can be undertaken on behalf of individual institutions, for a small fee to cover the staff time required. Any interested institutions are asked to contact Sonya White directly (sonya.white@hotmail.co.uk) to discuss their requirements.