

Spotlight: the Covid-19 library continued

The start of the 2020-21 academic year presented a varied picture across the UK – in some areas restrictions were being lifted and entertainment venues were reopening, whilst other areas were once again in lockdown. This was followed, later in the year, by workers being asked to return to working from home, tier systems of restrictions and further lockdowns throughout the UK. Universities also saw the return of students to campus, although this was not a straightforward process with the rapidly-changing situation as a result of the pandemic.

The 2019-20 report explored the early impact of the Covid-19 pandemic on the UK HE sector and this report for the 2020-21 SCONUL Annual Statistics will revisit some of the topics included last year, as well as considering the questions added to the survey aiming to capture how libraries adapted their services to deal with the pandemic.

Key findings

- Average¹ unique loans and visits per FTE user² continue to fall, while the average number of unique loans per 100 visits increased in 2020-21 – and stands at its highest level in the five-year period.
- In 2020-21, 22% of information provision expenditure was accounted for by e-books – compared to 15.7% in 2019-20.
- In 2020-21, 5.2% of information provision expenditure was accounted for by print books (including special collections) – compared to 7.1% in 2019-20.

Library space

The varying restrictions imposed throughout 2020-21, along with an emphasis on social distancing, saw academic libraries forced to reconfigure and adapt their available space to comply with the latest regulations and to ensure the safety of both staff and users. As a result, and in most cases, the available space fluctuated over the year and SCONUL collected data on the minimum and maximum study spaces and workstations, as well as the overall situation on 31 July 2021 when most institutions were still operating at a reduced capacity.

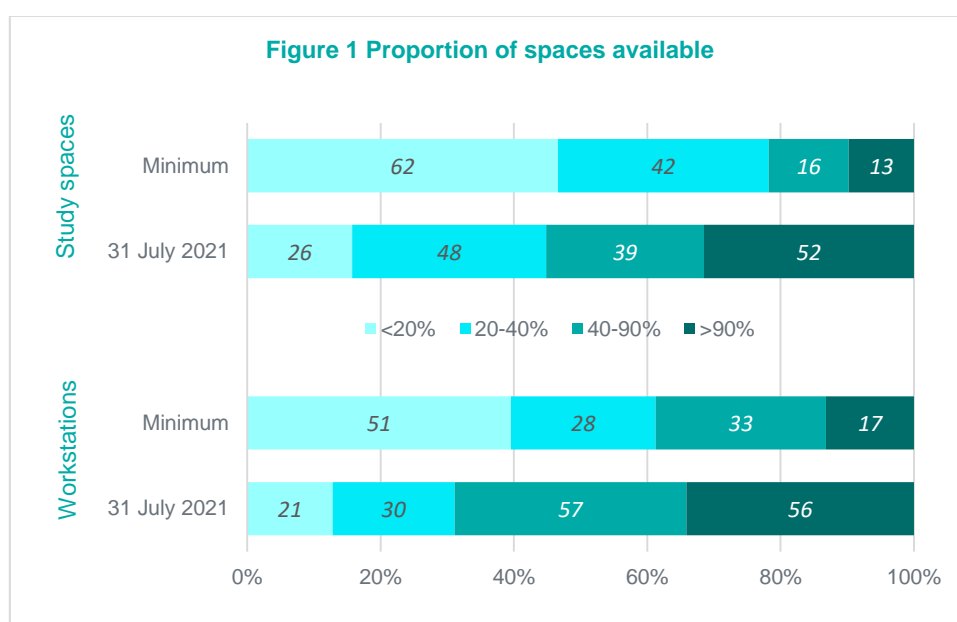
The data collected in 2019-20 asked users to provide the ‘usual’ situation rather than the position on the 31 July 2020 when restrictions were still in place. Figure 1 compares the proportion of the ‘usual’ study spaces and workstations (as recorded in 2019-20) that were available to users on 31 July 2021 and the minimum proportion of the ‘usual’ spaces that were available over the 2020-21 academic year.

Overall, 47% of responding UK institutions indicated that the number of study spaces available at the lowest point in the year was less than 20% of the ‘usual’ capacity, while 16% reported that they were still operating at less than 20% of usual capacity on 31 July 2021. In comparison, just 9.8% of responding UK institutions reported that the number of study spaces available at the lowest point during the year was more than 90% of the ‘usual’

¹ Note that the averages given throughout the report are the weighted averages of all institutions included

² Throughout this report FTE users are calculated as FTE students + FTE academic staff

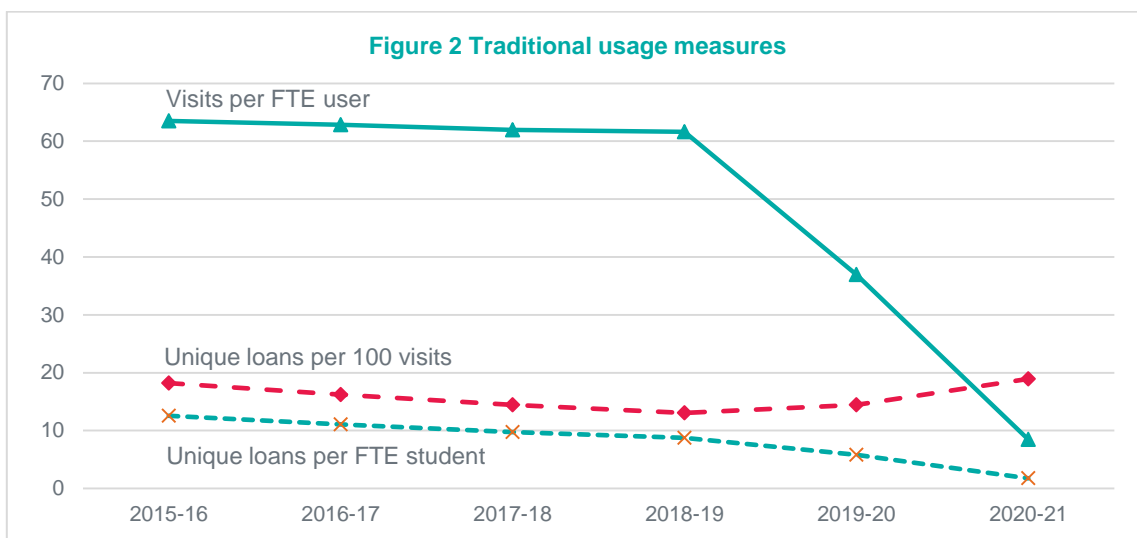
capacity, while 34% reported they were operating at almost full capacity with more than 90% of study spaces available on 31 July 2021. Similarly, 40% of responding UK institutions reported that the number of workstations available at the lowest point was less than 20% of the 'usual' capacity, while 12.8% noted that this was still the case on 31 July 2021. In contrast, just 13.2% of responding UK institutions reported that the number of workstations available at the lowest point during the year was more than 90% of the 'usual' capacity, while around one-third noted that they were operating at almost full capacity on 31 July 2021. It should be noted that some institutions reported more study spaces available on 31 July 2021 than in 2019-20 as a result of refurbishments and new buildings.



It is notable that 21% of responding UK institutions indicated that the library opened or contributed to the management of additional spaces elsewhere on campus in 2020-21 to allow for social distancing, and in some cases these additional spaces were included within the space figures provided.

Traditional usage

As noted last year, and not surprisingly considering the lack of students on campus for periods of time, the Covid-19 pandemic has significantly impacted on more traditional library usage figures such as footfall and loans. Figure 2 highlights that the average number of visits per FTE user remained relatively stable in the four years prior to the pandemic at a level just over 60. However, the two most recent years have seen a substantial decrease so that there were around eight visits per FTE user, on average, in 2020-21 – compared to an average of almost 37 visits per user in 2019-20. In addition, the average number of unique loans has also seen a decrease in the two most recent years, albeit at a slower rate, so that there were just 1.8 unique loans per FTE student, on average, in 2020-21, compared to 8.8 in 2018-19. It is encouraging that the average number of unique loans per 100 visits has increased in 2020-21 and stands at its highest level for the five-year period and is perhaps indicative that when users returned to campus access to the physical collection remained a key reason for visiting the library.

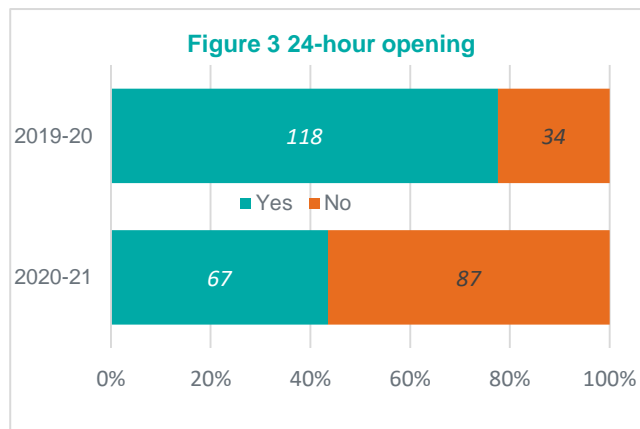


Quarantine practices

Overall, 96% of responding UK institutions noted that returned items were quarantined for periods of time during 2020-21, with 72 hours the most popular duration. It should be noted that the length of quarantine ranged from less than 24 hours to seven days at different institutions and at different periods of time.

24-hour opening and laptop loans

24-hour opening had increased in popularity since SCONUL began collecting the data in 2013-14, although it should be noted that the data hides a wide range of differing policies, with some institutions providing 24-hour access throughout the year and others only providing access to study areas and IT rooms rather than to the collection. Figure 3 illustrates that in 2019-20, with the Covid-19 pandemic only impacting on the latter half of the year, 118 responding UK institutions (78%) reported that they had offered some level of 24-hour opening of the library. However, in 2020-21, fewer than half (44%) of responding UK institutions offered 24-hour opening, with several institutions noting that this service had been suspended in response to the pandemic.



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The short-term loan of laptops to students is also a service that has been impacted by the pandemic, with several institutions noting that the laptops that would usually be available had been redirected and loaned to staff to facilitate working from home. Overall, 56% of responding UK institutions indicated that laptops were available to students for short-term loan via the library in 2020-21, compared to 72% in 2019-20.

Information provision expenditure

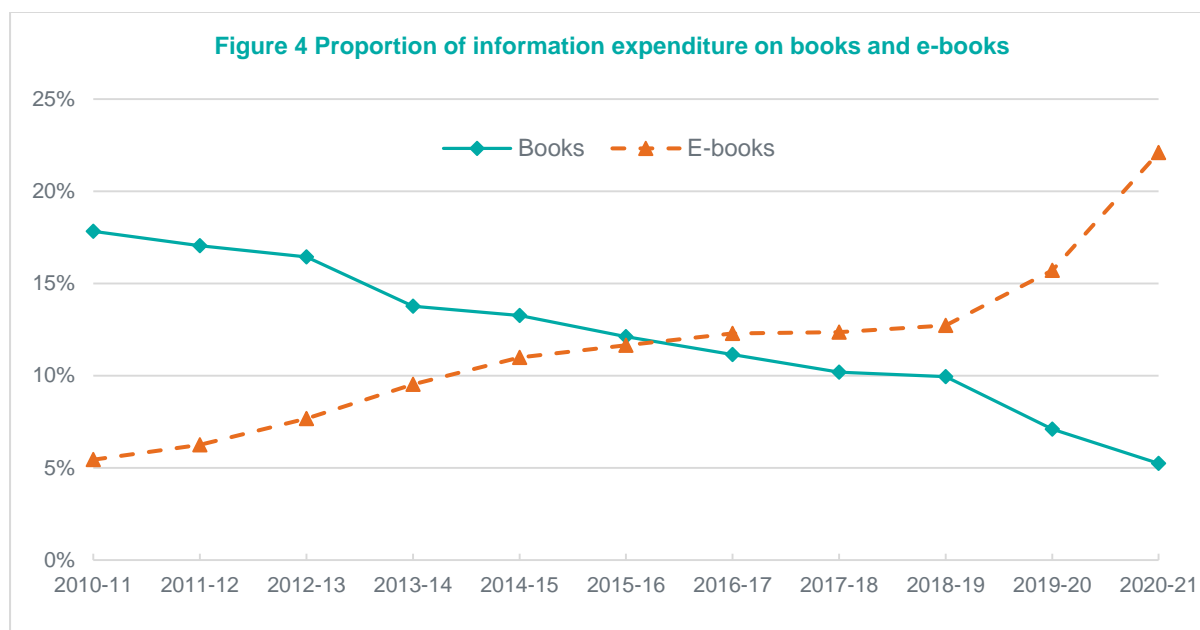
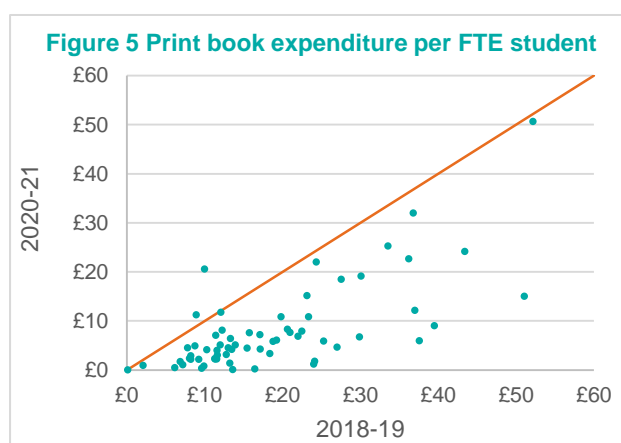


Figure 4 illustrates that the digital shift has been slowly evolving for more than ten years, with a gradually declining proportion of information expenditure accounted for by print books and an increasing proportion allocated to e-books. However, the Covid-19 pandemic, and the overnight demand for remote access, has accelerated the shift to spending on electronic resources, and in 2020-21 e-books accounted for 22% of information provision expenditure, compared to 12.7% pre-pandemic. In contrast, print book expenditure appeared to have levelled off in 2018-19 and accounted for 9.9% of information provision expenditure – compared to just 5.2% in the most recent year.



It should be noted that not all institutions reporting a decrease in the proportion of expenditure spent on print books in 2019-20, continued this trend in 2020-21, with 27 out of the 107 institutions providing data in both years, spending a larger proportion of information provision expenditure on print books in 2020-21 compared to 2019-20. However, when we compare print book expenditure per FTE student in the most recent year, with that reported pre-pandemic, we see that just

two institutions (of the 66 providing data in both years) recorded higher levels of expenditure in 2020-21 compared to 2018-19 (and therefore lie above the line of equality in Figure 5). It is encouraging that some institutions have increased expenditure on print books during 2020-21, although it is evident that we are still some way off the pre-pandemic levels, and it will be interesting to see how this might change in the first full academic year with no restrictions imposed.

Conclusion

At the time of writing, the situation is more hopeful that it has been since the start of the pandemic, with all restrictions in the UK lifted and students back on campus, although the pandemic is by no means over and is likely to continue to impact on the UK HE sector for years to come.

Despite the situation having improved overall since last year, the questions raised then are still relevant, and we are not yet able to answer them definitively:

- 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?

One thing that is certain, academic libraries continued to show their adaptability as they took the lead and swiftly responded to the pandemic to allow users remote access to resources so that teaching and research could continue. It will be some time before we have an idea of what the new 'normal' will be, but the last two years have shown that academic libraries are likely to continue to play a prominent role in HE institutions.

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

Figure 6: SCONUL UK university/college membership and response rates



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 126. 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

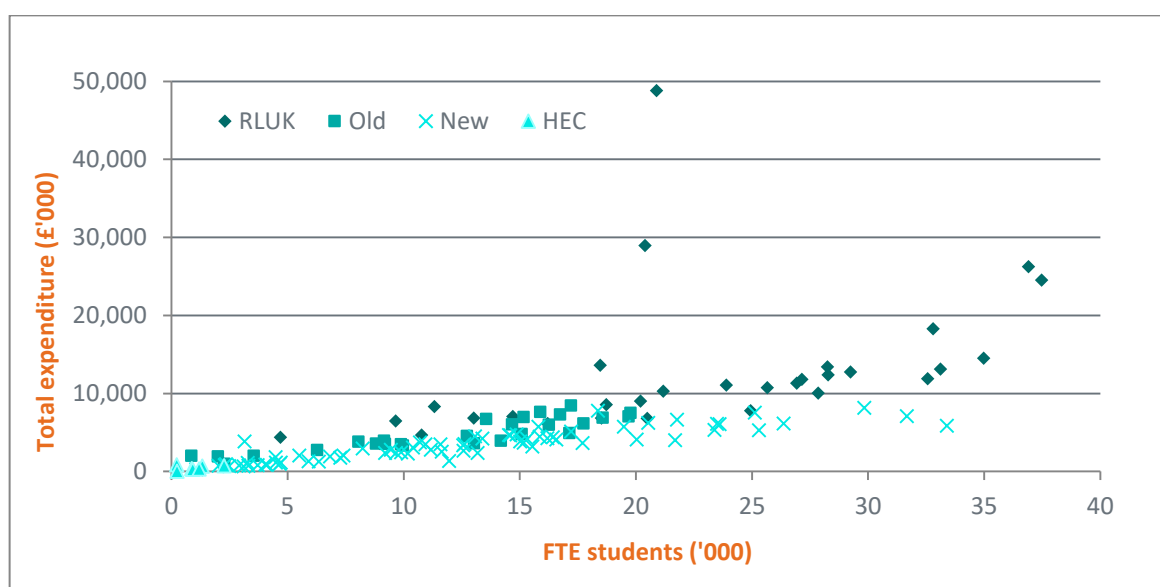
Over recent years, respondents have made efforts to improve the quality of data returned, and each year there are fewer gaps and less data identified as not conforming to the definitions. There is also increased consistency over the distinction between “not applicable” (*the activity concerned is not 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 users of the statistics are recommended to read the notes to the returns (*pp 80-123*) in conjunction with the figures, to aid interpretation.

Financial summary

Figure 7: Total library expenditure and student numbers (UK)



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 12-15*). This shows both actual expenditure and expenditure per FTE student for the main heads of staff, information provision, equipment, and other operating expenditure. The 149 UK members which provided full details for this summary spent over £800 million in total, an average of £364 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 16-27*). These tables present the most recent available data and so may vary from those in the Strategic Planning Set tables originally released in December 2021. 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 28-59*) show the data as received from each institution. The data extend over four pages for each column. The list of institutions (*pp 80-123*) 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 2021. 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 127-136*).

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 80-123*). 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 on the questionnaire have been included at appropriate points in the series. Detailed definitions for these columns are given in Appendix A (*page 124*). 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 five responding members have provided data.

Derived statistics

The derived statistics follow the main data tables, starting on page 60. Full definitions for each are given in Appendix A (*pp 124-126*). 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 60-63*)
- Stock - provision (*pp 64-67*)
- Stock – expenditure and use (*pp 68-71*)
- Staff workload (*pp 68-75*)
- Financial ratios (*pp 72-79*)
- Electronic resources (*pp 76-79*)

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 2020-21 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.