

COMMENTARY ON THE 1999-2000 CARL/ABRC STATISTICS.

General Observations

There are certain inherent difficulties in making inter-library comparisons from annual statistics of the type collected by CARL/ABRC and other library organizations. Firstly there is the philosophical problem of what to count. The things that we count are sometimes crude surrogates for the quality of a library in the context of the clientele that it serves. Unfortunately, measuring what matters: *the frequency with which the patron gets what they want, when they want it, at the lowest possible cost to patron and institution*, is not easily measured. Consequently we must make do with reporting the quantifiable.

Then there are the practical problems. Despite the best efforts of the compilers, it is inevitable that there are different interpretations of the definitions (what is a reference transaction, etc.?). There are different ways of counting (ab initio inventories, linear estimates, etc.) and different internal practices (loan policies, etc.). The reader should also recognize that some of the numbers reported, are frequently only estimates, with significant inherent errors of estimation. For example volume counts are not usually generated from a complete inventory each year but are usually estimated in some way.

On the other hand, some measures, such as expenditure figures can yield valid comparisons, especially when compared to overall university expenditures or student enrolments. As well, year over year comparisons of the same measure, or ratios of measures, for a given library should yield valid information about changes in that library.

In an attempt to improve the value and validity of the annual statistics and to reflect changing circumstances, CARL/ABRC modified and extended its annual statistical questionnaire for the 1996-97 statistics published in May 1998. The present publication represents the fourth annual statistical report using these new definitions and the second to contain a textual commentary. Some data in the new statistics were not previously collected or were collected using a different set of definitions. This means that retrospective comparisons going back further than 1996-97 have to be made with care.

Regrettably, not all libraries provide a complete statistical report every year, so that when making year over year comparisons, it is only valid to do so for libraries that consistently reported data in the same categories for both years.

It is with the above provisos in mind that the reader should turn to the data presented in the annual statistical tables.

1.0 EXPENDITURES

1.1 Collections

Average total expenditures on library materials increased in every region of the country between 1998-99 and 1999-00. This reflects the fact that these expenditures rose in 23 of the 29 CARL/ABRC member libraries. Overall library materials expenditures also rose faster than the Consumer Price Index (CPI) in all regions.

Expenditures on monographs (print and electronic combined) rose on average in all but the Prairie region and in 20 CARL/ABRC libraries. The largest relative increase in monograph expenditures was reported by Université du Québec à Montréal (UQAM) – 73.4%. Although the figures are incomplete, expenditures on electronic monographs were significant in some libraries. Alberta reported spending \$287,763 in this category, 10.4% of overall monograph expenditures. Toronto reported spending \$301,565 on electronic monographs.

Expenditures on serials (print and electronic combined), the largest part of the materials budget in all CARL/ABRC libraries, rose in all regions except the Atlantic, where they fell slightly. Serial expenditures increased substantially at CISTI and slightly at the National Library.

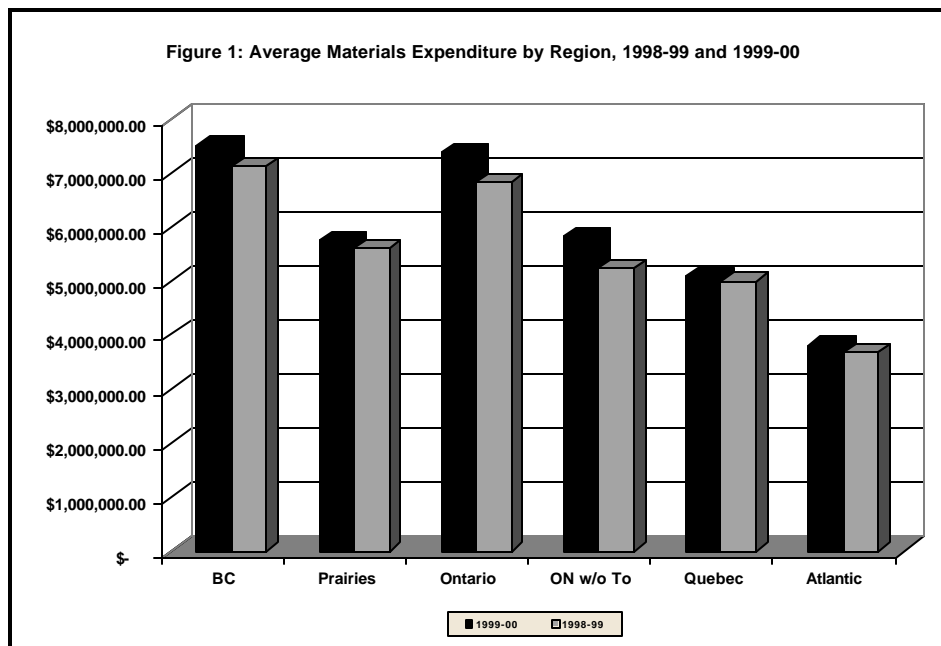
For the first time in several years, the ratio of expenditures on monographic materials to serial library materials did not decline on a year over year basis. In fact, this ratio increased slightly in every region except Ontario.

Table 1: Ratio of Monograph to Serial Expenditure by Region

Region	Average Monograph Expenditure	Average Serial Expenditure	Ratio	Ratio
	1999-00	1999-00	1999-00	1998-99
British Columbia	\$2,109,753	\$5,408,323	0.39	0.38
Prairies	\$1,484,350	\$4,077,559	0.36	0.32
Ontario	\$1,917,082	\$5,003,209	0.38	0.40
Quebec	\$1,279,761	\$3,645,009	0.35	0.35
Atlantic	\$ 793,024	\$2,844,601	0.28	0.24

The pattern of overall library materials expenditures by region remained substantially unchanged from 1998-99. The highest average expenditure was in BC, closely followed by Ontario, with the lowest in the Atlantic Provinces. Toronto continues to have by far the largest materials expenditures of any Canadian library, spending \$21.6 million in 1999-00. The other 9 Ontario CARL/ABRC libraries averaged materials expenditures of \$5.82 million ranking them ahead of the third place Prairie region at \$5.76 million. (Last year the Prairies surpassed Ontario when Toronto was excluded.) As in the previous year, University of British Columbia reported the second biggest materials expenditures of the 27 CARL/ABRC universities, although far behind Toronto. Alberta ranked third. CISTI spent \$12.1 million, ranking it between UBC and Alberta. At the other end of the scale, Regina had the smallest materials expenditures of CARL/ABRC universities (\$1.4 million) just behind New Brunswick (\$1.8 million), a ranking reversed from the previous year. The National Library's expenditures declined from the previous year to a figure of \$1.7 million, although it should be noted that much of their collection is acquired at no cost through legal deposit.

Figure 1 shows the variation in average library expenditures by region compared to the previous year.



1.2 Overall Expenditures

Total library expenditures (salaries, materials and operating) increased in all regions of the country between 1998-99 and 1999-00. As was the case the year before, the average for BC was the highest, followed by Ontario and the Prairies. Total library expenditures dropped at Manitoba, Regina, Saskatchewan, Windsor, Guelph, Concordia and New Brunswick. Expenditures also dropped slightly at the National Library. In the other 21 CARL/ABRC libraries overall expenditures increased year over year.

Taking the average for all 29 CARL/ABRC libraries, compared to the previous year there was a slight shift in the proportion of total expenditures spent on salaries into library materials and operating expenses. In 1999-00 CARL/ABRC libraries averaged

53.05% of expenditures on salaries, 35.26% on materials and 11.69% on operating. The variations by region are not great, but Québec continued to spend a larger proportion of total budget on salaries (58.49%) than the other regions. Of university members, UQAM reported the largest percentage expenditure on salaries (68.32%) and Simon Fraser University the lowest (44.38%). University of Western Ontario reported the highest percentage of overall expenditures on library materials (45.49%) and UQAM the lowest (28.88%).

1.3 Salaries and Employment

Compared to the previous year (1998-99) the proportion of the total library budget spent on salaries dropped slightly in each of the five regions, continuing a downward trend that started several years ago. However, in absolute dollar terms, staffing expenditures increased marginally in most CARL/ABRC libraries. The average staffing expenditure across the country increased by 3.0%. In other words, libraries were continuing to constrain staffing expenditures relative to expenditures on other things, particularly library materials.

Compared to the year before, the total number of professional staff rose marginally across the country – an increase of 1.0 (from 55.5 to 56.5) on a national average basis. Support staff Full-time Equivalent (FTE) rose by an even slimmer margin – from a national average of 130.1 to 130.7. Casual staff FTE also rose slightly – from 24.2 to 25.3.

Comparing the four years of comparable data from 1996-97 to 1999-00 overall staffing levels dropped only slightly on a national basis although there were significant variations between individual institutions. For example, over this four year period, UBC dropped 13.8 FTE librarians (from 105.0), the National Library dropped 15.0 (from 200) and Waterloo dropped 5.0 (from 35.0). A few libraries increased the number of professional librarians, e.g. Alberta went from 58.0 to 64.0, Calgary went from 32.0 to 41.0 and CISTI went from 55.0 to 75.0, but generally the trend for professional librarian employment is downwards. At the same time the number of “other professionals” employed in CARL/ABRC libraries has increased. A similar pattern is observed with support staff. Numbers have declined in most libraries, while increasing substantially in the few better-funded institutions. The number of casual staff FTE’s were up marginally, partially offsetting the decline in regular staff.

The national average professional salary in CARL/ABRC university libraries dropped substantially from \$70.0K to \$62.8K between 1999-00 and 2000-01. Last year York reported the highest mean professional salary, \$84.8K, with Carleton in second place at \$84.0. This year Carleton regained the lead with a mean salary of \$82.6K, significantly ahead of second place New Brunswick at \$74.8K. Meanwhile York’s figure dropped substantially to \$70.2K. Clearly substantial staff turnover is taking place, with younger staff coming in at lower salary levels. This is reflected in the average years of professional experience reported – a number that has dropped across the country by 3.1 years. But, at an average of 19.3 years, there is still considerable room for it to drop further!

Not surprisingly, despite signs of staff renewal at the lower end of the age spectrum, salary creep is moving a greater number of professional library employees into the over \$80,000 bracket. In 1998-99 there were 110 individuals earning over \$80,000. A year later the number had increased to 122. Those universities whose librarians are most closely tied in with their general faculty collective agreements figure the most prominently in the list, notably York, Carleton and UBC. As in previous years, Carleton reported the highest proportion of over \$80K earners.

2.0 COLLECTIONS

With the exception of one institution, Sherbrooke, every CARL/ABRC member reported adding more volumes to their collections than they withdrew in 1999-00. Consequently, 28 of the 29 libraries’ collections grew overall, continuing the trend of many years. Toronto with 9,195,841 volumes houses Canada’s biggest library collection, followed by the National Library with 7,267,860 volumes, Alberta with 5,527,712 volumes and UBC with 4,106,011 volumes. The National Library increased its collection by 337,164 volumes, Toronto 246,887 volumes and Alberta by 151,262 volumes. At the other end of the scale, Regina’s collection grew by only 6,629 volumes, CISTI’s by 9,108 and Carleton’s by only 12,427 volumes. Meanwhile Sherbrooke actually reduced its collection by 149 volumes.

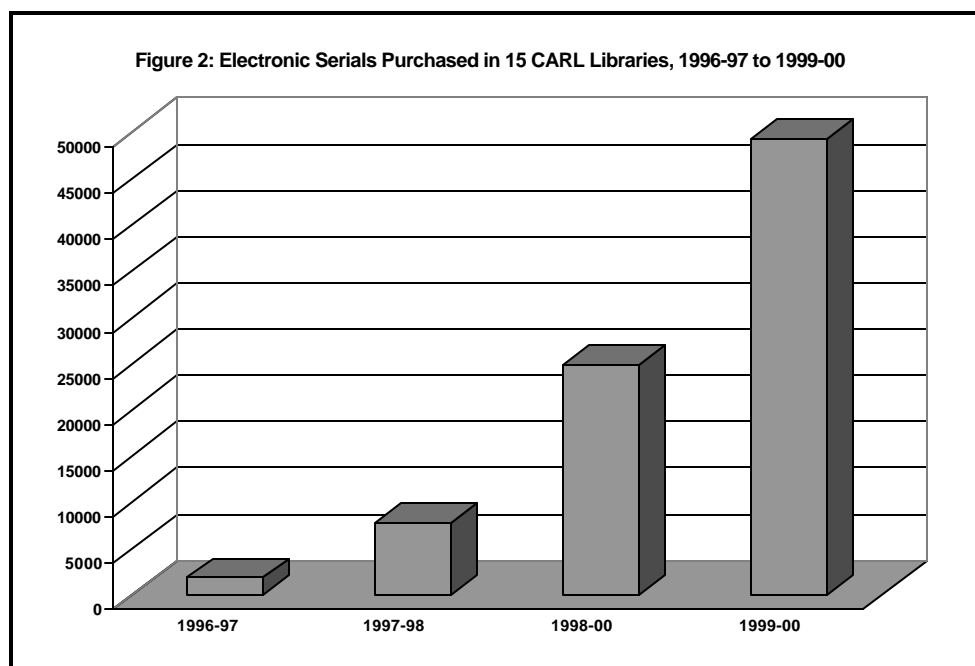
There appears to be an increasing divergence between the size and scope of Canada’s largest research libraries and their smaller counterparts. To illustrate this, in 1996-97 the ratio between the aggregate collection sizes of CARL/ABRC’s three

biggest university libraries (Toronto, Alberta and UBC) to that of the three smallest (Regina, Sherbrooke and New Brunswick) was 6.69. Just four years later that ratio had grown to 7.54.

On average the 22 CARL/ABRC university libraries that reported data in the two years bought 23,508 monograph volumes compared to 22,916 the year before. However, Toronto's enormous tally of 150,745 purchased monographs, an increase of 21,000 from the previous year, skews the average. Without Toronto there would have been a slight drop in the average number of monographs purchased. **However it appears that, at least temporarily, the decline in monograph purchases resulting from a shift of resources into serials has bottomed out.**

The average number of hard copy serial titles purchased dropped between 1998-99 and 1999-00 by 434 titles to 10,481 (for the 21 university libraries reporting consistent data). This continues the trend observed for several years as printed serial costs have escalated faster than libraries' ability to pay for them. **Print serial cancellations continue unabated at libraries across the country. Three libraries, McGill, Alberta and UBC each reported cancelling more than \$700,000-worth of titles in 1999-00. Alberta alone cancelled 2,086 print titles worth over \$800,000.** While these cancellations were partially offset by new subscriptions in every library, the former greatly exceeded the latter in most cases. (The reader is referred to last year's *Commentary* for a fuller discussion of the effects of inflation on serial purchases.)

The trend in the purchase of electronic serial titles, however, is dramatically different. **In just one year the average number of electronic titles purchased by the 20 CARL/ABRC university libraries reporting increased from 1,714 titles to 2,923 - an increase of 70.5%. Toronto now purchases almost one third as many electronic serial titles as print titles (10,396). For the 15 CARL/ABRC libraries that reported data consistently on electronic subscriptions purchased over the four-year period, the total number of subscriptions jumped from 1,842 in 1996-97 to 49,408 in 1999-00.** This is shown graphically in Figure 2 below.



This surge in electronic serial titles purchased has offset the effect of declining print subscriptions. In many cases, CARL/ABRC libraries now purchase more serials than they did 4 years ago even though they have greatly reduced their print subscriptions. For example, Toronto has over 3,000 fewer print serial titles than it did 4 years ago, but overall purchases subscriptions to over 5,000 more titles when electronic titles are included. Libraries frequently duplicate paper and electronic subscriptions to the same title. This may be as the result of a deliberate policy decision, or it may be a condition of purchase. The statistics on serial subscriptions may include considerable duplication.

In addition to serial titles purchased, CARL/ABRC libraries report a significant number of titles not purchased. In some cases these unpurchased subscriptions increase total holdings by as much as 20%. These may be free materials (print and electronic) as well as titles donated, exchanged, or received on deposit. As few libraries systematically control the free

electronic materials to which they may have access, the numbers cited may be incomplete.

3.0 INTER-LIBRARY ACTIVITY

3.1 Lending

In 1999-00 the largest lender of original documents (“returnables”) was once again Alberta filling 102,666 loan requests, up from 78,699 the year before. This far exceeded the volume of lending by any other CARL/ABRC library. CISTI in second place filled 30,241 requests for original material.

In terms of copies (“non-returnables”) CISTI was by far the largest supplier, filling 537,123 requests. The next highest was Toronto, filling 42,218 requests for copies. In general CARL/ABRC libraries are lending and supplying copies to customers within Canada with much of the volume being to other libraries within the same province. The notable exception is presumably CISTI, although they do not provide a detailed breakdown of where their customers are.

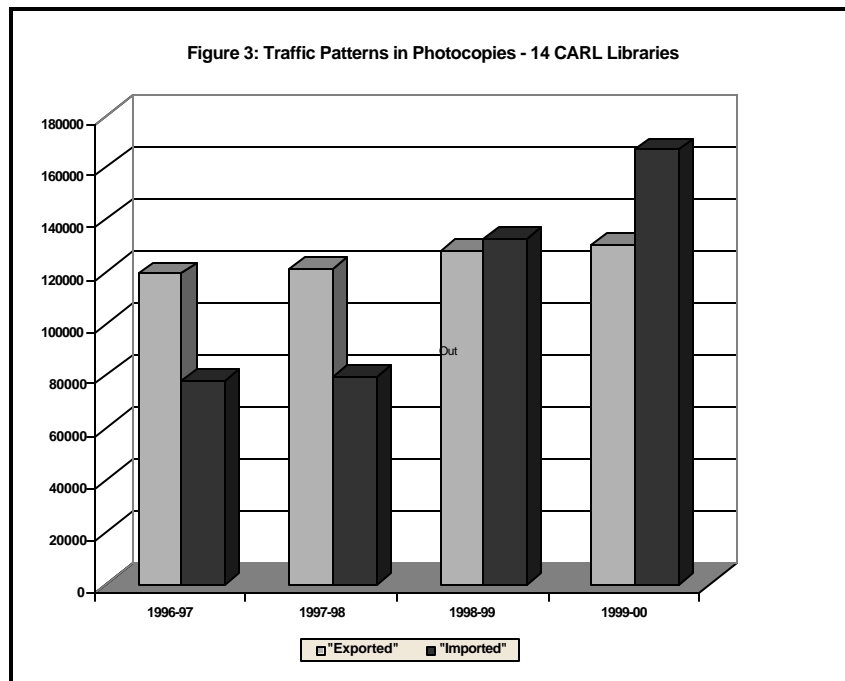
The overall volume of copying and lending, particularly amongst the larger CARL/ABRC libraries, continues to rise rapidly as smaller libraries become more dependent on obtaining materials from beyond their own collections. For example, CISTI, the largest supplier of copies in Canada, reported supplying 406,846 copies in 1996-97. The number reported above for 1999-00 represents an increase of 32.0% in 4 years.

3.2 Borrowing

Guelph was apparently the largest CARL/ABRC borrower of original materials, receiving 53,991 originals, but the figures reported are for all the Tri-University Group (Guelph, Waterloo, Wilfrid Laurier). Alberta was the second largest borrower (33,380). Not surprisingly, Toronto with its enormous collection borrowed only 4,656 items, but half of these items were from outside Canada.

In terms of copies “borrowed”, Calgary was the largest consumer receiving 38,142 copies. Six other CARL/ABRC libraries reported receiving over 20,000 copies (UBC, Simon Fraser, Victoria, Guelph, Montreal and Sherbrooke). Approximately 90% of the copies received by CARL/ABRC libraries were supplied from within Canada. The volume of copies received in 1999-00 increased markedly from the year before, continuing a multi-year trend. This increase in copies received is clearly related to the decline in print serial holdings discussed above. It will be interesting to see if the rapid increase in electronic subscriptions results in a levelling off in the demand for “hard copy” journal articles in the future.

Figure 3 below shows the four-year “balance of trade” in photocopies for 14 representative CARL/ABRC libraries that reported data every year. (The libraries are the CARL/ABRC libraries in Ontario and Quebec, except Toronto and Sherbrooke). In the first two years these libraries exported more than they imported, while in the last two years they have become net importers. At the same time the overall volume of traffic has increased in both directions.



4.0 EMERGING SERVICES

The emerging services questionnaire looks at a variety of newer library services. The following is a summary of some of the highlights.

Electronic publishing: Ten libraries offer assistance in electronic publishing, an increase of one from the year before.

Quantitative data analysis (data libraries): Nineteen of the twenty-nine libraries now offer this assistance, an increase of one from the year before.

Digital imaging: Ten libraries offer assistance in this area, down one from the previous year. Eighteen libraries also offer **digitization** of text and/or graphics.

Student fee for library service: The number of libraries claiming to charge a fee has declined from four to three. Despite financial constraints, this does not appear to be a revenue source that is being widely exploited.

RECON: Eight libraries state that their Retrospective Conversion of Catalogued Materials (RECON) project is not completed, a number that seems to bounce around from year to year.

Web access from library workstations: All CARL/ABRC university libraries offer web access from library workstations. The number of workstations available in libraries for Web access continues to grow. Toronto has 1,671 such stations and three other libraries have more than 300.

OPAC access: All CARL/ABRC university libraries have a significant number of workstations in the library that can access their Online Public Catalogue (OPAC). This number ranges from 27 in Sherbrooke to 1,131 in Toronto.

Shared storage: Six libraries participate in a shared storage consortium

Library Computer Systems: All CARL/ABRC libraries except Carleton and UQAM, who have home-grown systems, operate library systems supplied by a variety of commercial vendors. All but four libraries have an OPAC that supports Z39.50, although not all are compliant with the Z39.50 Bath Protocol.

5.0 HARDWARE AND SOFTWARE EXPENDITURES

Libraries continue to devote significant resources to electronic hardware and software to support the transition to an increasingly digital library world. In 1999-00 electronic hardware expenditures ranged from \$72,335 at Regina to \$2,020,315 at Toronto.

Software expenditures, while considerably less than those on hardware, were also significant, ranging from \$365,777 at Western Ontario to only \$7,316 at York.

6.0 CIRCULATION ACTIVITY

Comparing circulation activity between libraries is difficult to do. Libraries have different circulation policies and different definitions of what is counted. To make matters worse, circulation policies frequently change over time.

Between 1998-99 and 1999-00, 12 university libraries reported an increase in circulation transactions, while 15 reported a drop. This is consistent with the trend reported in last year's CARL/ABRC statistics. **It would appear that, despite local exceptions, there is a long-term decline in circulation transactions per capita taking place in CARL/ABRC university libraries.** One can speculate that this is a reflection of the increasing importance of electronic sources as a source of information.

Despite increased enrolment at most universities, reserve transactions declined more sharply than overall circulation transactions. Only 4 of the 20 CARL/ABRC libraries reporting data experienced an increase in reserve transactions. Again this is consistent with trends reported last year. It would appear that more and more course materials are being distributed by the Web or in copyright-cleared "course-packs" and hand-outs.

Measuring in-house use is notoriously difficult and unreliable, but for those libraries that do report such data, the majority experienced a continuing decline in the volume of transactions. Not surprisingly, this was particularly marked in those libraries with large investments in electronic subscriptions. Toronto reported a year over year decline of 10.1%, at Calgary 12.0%, and at Guelph in-house use declined 8.0%. Presumably users are taking advantage of the ability to access electronic library materials from their desks, rather than consulting printed volumes in the library.

7.0 SERVICE HOURS, INSTRUCTION AND REFERENCE ACTIVITY

In 1999-00 the average number of staffed library service points in all CARL/ABRC libraries was 18.5, a slight increase over the previous year. The average number of weekly public service hours in the university libraries was 91.7, also up slightly from the previous year. Over the four years of comparable statistical data, there have been only minor fluctuations in these two figures, suggesting that libraries have decided that further cuts in basic service are undesirable.

All library reference departments are active in making presentations to groups (mostly students). There does not appear to be any pattern in the statistics on participation in such presentations. While large in absolute terms, participation in such presentations represents a fairly small percentage of the overall student body at most universities.

Counting reference transactions is an inexact science and libraries do not do it in a consistent manner. However these statistics are down in 20 of the 29 CARL/ABRC university libraries compared to the year before. Last year these numbers were down in 21 of the 29 libraries. Given that hours of service have not declined and that enrolments were generally up across the country, one has to surmise that library clients (mostly students) are using other sources of information, such as the Web. An alternative but related explanation is that libraries are experiencing less traffic through their doors, which is also reflected in the declining volumes of in-house collection use. Unfortunately, CARL/ABRC does not report information such as gate counts to measure overall traffic.

David Holmes, May 2001