

## 1993 CAPP BOOK AND JOURNAL SPENDING REPORT

**Claire Waddell**

*The university library acquisition programme is seriously underfunded. Academic librarians, publishers and all those involved in education agree that drastic action needs to be taken to improve the current situation. But there are many conflicting views on how this can best be achieved. Claire Wardell of the Council of Academic and Professional Publishers, gives a survey of the situation and an insight into what the statistics say.*



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The Council of Academic and Professional Publishers, a division of The Publishers Association, produces an annual report on book and journal spending in higher education institutions. Each year the figures detailing academic library acquisitions get increasingly more depressing to read. The latest report, published last October, states that over the last 13 years expenditure in university and (former) polytechnic libraries has fallen so dramatically that an investment of over £31 million would be needed to make up the shortfall. In many cases, a year on year decline is continuing to worsen the situation. 21 of the 52 universities are spending less in cash terms than the previous year and 8 of the 30 (former) polytechnics are now spending less than £20 per year per student on books. However, there is one aspect of the library acquisition programme that emerged from the 1993 report as suffering from significant additional problems of its own - periodical acquisition. Not surprisingly, this has become a contentious subject between librarians and publishers.

Libraries are the prime purchasers of periodicals, so the spending patterns of academic libraries have a fundamental effect on their market performance. The report of the Follett Review Committee, published in December, points to the rising prices of books and, especially, journals as one of the main problems of academic libraries. The report states that this situation has "intensified in the last two years, with substantial increases in periodical prices and in the prices of specialist monographs." The report goes on to say that "the prospect for 1994 is worse, with prices rising faster than ever as a result of the combination of the recent weakness of sterling against continental European and United States currencies, and the (often associated) 'harmonisation' of many periodical subscription rates with prices elsewhere in Europe, which almost invariably means an increase in UK rates." Blackwell's currently estimates that there will be an average price increase of between 17 per cent and 25 per cent during 1994.

The academic librarians' concern about periodical price increases is shared by publishers. An annual report entitled *Trends in Journal Subscriptions* published by the Council of Academic and Professional Publishers (CAPP) through its Serial Publishers Executive gives a detailed up-to-date account of the situation based on information gathered via questionnaires from serial publishers. (For the purpose of this survey, a journal was defined as a serial publication supplied on a paid subscription basis, appearing regularly with at least two issues a year, and published in the UK by

the respondents.) The report, which collates the latest available information, shows that the average full-rate subscription price over the whole subject range in 1992 was £136, an increase of 20 per cent over 1991. There was a wide variation between the highest and lowest subscription rates. At the top was physical science, averaging nearly £290, followed by life science at £192; medicine and professional averaged £123; applied science £99; social science just under £60 and arts, the lowest, at £41. The price per editorial page, which the report suggests "provides a very rough guide to 'value for money' vis-a-vis the total subscription price (and can be correlated with document delivery services' per-page charges)", was again wide-ranging, from an average of 9.9 pence per page in arts to 24.2 pence for applied science. The changes over 1991 ranged from increases of 21.7 per cent in professional journals to a decrease of 9 per cent in applied science. At the same time, the report suggests that a general lack of funds, greater pressure on researchers to publish and the expansion of knowledge into new fields have been leading to increases in the number of journals published. Respondents were publishing 54 more journals in 1992 than in 1991, a growth of some 7 per cent. All subjects showed an increase, although by far the greatest growth in titles (17) was in medicine.

Unfortunately, these increases in frequency of publication and higher levels of pagination were accompanied by a fall in journal subscriptions. The overall average total subscriptions per journal, at 1,972, showed a decrease of 3 per cent over 1991. The subscriptions paid for at full rate showed a larger decrease, of 5 per cent, as the proportion at reduced and concessionary rates increased.

The increase in the number of journals published alongside the fall in journal subscriptions is inevitably forcing up subscription rates. As the Follett Review report explains, "There is a vicious circle in which higher prices prompt more cancellations, which in turn promote higher prices." The challenge faced by publishers and academic librarians as we move towards the 21st century is how to escape the never-ending spiralling of periodical pricing.

The vision of the future of the academic library put forward by the Follett Committee

includes a portrait of the "virtual library". In the scenario, the central feature of the undergraduate, Alice's, bedroom is a computer. In pursuit of top marks, Alice calls up an electronic journal recommended by her tutor on her personal computer. The story goes - "She finds that it will cost £10 for immediate transmission. Second groan of the day - her credit card limit is going to be stretched, but it is urgent. She calls up the abstract/front page option screen, decides it is worth reading, swipes the credit card and in a few seconds the article is on screen, transmitted over the networks from an electronic document delivery exchange in Colorado."

The development of information technology and document delivery systems, which could well eventually work as described above, is certainly one way to challenge the steadily worsening periodical acquisition situation. The report of the Follett Committee calls for institutions to make the fullest possible use of the SuperJANET network and the investment of £20 million to investigate the possible effects of information technology on libraries over the next decade. However, it has not yet been proved that this revolutionary method of library book and journal acquisition will be any cheaper than purchasing the hard copy.

Owing to lack of space and other pressures, the traditional concept of the library needs rethinking. The Follett Review report foresees that the academic library of the future will be judged on the quantity and quality of the information to which it can provide access, not on the books and periodicals it holds. Whether or not this is an 'attractive' or 'realistic' vision of the future academic library is a subject of great debate amongst librarians and publishers.

Many librarians and publishers are excited by the opportunities being opened up by the developments in information technology, while others are more cautious about the future. The major stumbling block is the issue of copyright. Copyright has been a matter of concern to many in both higher education and publishing for years. Fears surrounding copyright issues have been greatly intensified by developments in information technology. Publishers are anxious that they might lose legitimate control over their material, authors are concerned over loss of moral rights and protection of the material over which

they possess copyright, and, consequently, negotiations over electro-copyright have so far been slow. The length of time it will take before electronic texts can replace traditional journals, and maybe even textbooks, is difficult to estimate. In the meantime, it is very important that the needs of today's undergraduates, graduates and academics are met. All of them are suffering from discontinued journal subscriptions and limited acquisitions.

According to the 1993 *CAPP Book and Journal Spending Report*, periodical spending has fallen by nearly 40 per cent against the Blackwell's PPI. An investment of nearly £19 million would need to be made in university libraries across the UK, that is, an average of £44.12 per full-time student. Scotland and Northern Ireland lag behind the rest of the UK. Northern Ireland is spending about £13 less per student on periodicals than England and Wales. In all cases, sharp rises in student numbers, major course restructuring, increased emphasis on book-based learning and a significant reduction in individual student spending power have put increased pressure on library budgets.

In many instances, there have been increases in cash terms, especially in university libraries. According to the CAPP report, there has actually been a very slight increase in overall expenditure per full-time equivalent student on periodicals, when actual figures are adjusted by the Retail Price Index (RPI). According to the annual statistics for 1991/92 of the Standing Conference of National and Universities Libraries (SCONUL), university libraries are spending an average of nearly 55 per cent of their budget for materials on periodicals alone. Unfortunately, the price of periodicals has been outstripping inflation by an increasing amount and, consequently, to keep up adequate levels of provision a huge investment needs to take place. The *CAPP Book and Journal Spending Report* shows that, to achieve reasonable periodical provision, an extra £43.78 per university student is necessary.

The situation in (former) polytechnics is much worse. Eight polytechnics are now spending less than £20 per student on periodicals: South Bank Polytechnic (now South Bank University) spends only £12.88 per student, less than 20 per cent of the average figure for universities. The gap between periodical spending in universities and

polytechnics is huge. On average (former) polytechnics spend £45 less than the average (old) university on periodicals. (Former) polytechnic periodical acquisition shows a shortfall of nearly £3 million, when figures are adjusted by the RPI, and a real term shortfall of £8.5 million against the Periodicals Price Index.

The *CAPP Book and Journal Spending Report* shows that British Library acquisitions are also falling. In 1990/91, the Library reported that subscriptions to 200 high quality scientific journal titles had been suspended. Some 1500 foreign language serials at Boston Spa were cancelled and the acquisition of scholarly monographs and material from Eastern Europe, Africa and Asia was cut back. In 1991/92, the Library reported that book purchases for the European language humanities collections were severely curtailed. 5,500 low-use serial titles held at Boston Spa were also cancelled. During 1992/93, the Library was able to increase its acquisitions spending and to allocate some funds to fill gaps in the collection, so ameliorating the effects of financial constraints in the previous years. However, the devaluation of sterling and the rising prices of journals have affected the impact of additional expenditure, as in higher education institutions.

Librarians and publishers have mixed views of the *CAPP Book and Journal Spending Report*. Many believe that the report is useful to demonstrate the extent to which the issue of specific funding for books and journals needs to be addressed by the Government. Furthermore, it obtains press attention for the situation in academic libraries and, consequently, raises public awareness and gains public sympathy.

Others complain that the report is too one-sided and feel that the statistics presented fail to tell the whole truth. Firstly, in its activities, CAPP aims to foster good relations and a spirit of co-operation with academic librarians. CAPP believes that the key to the future, and an escape from the stranglehold that is stifling the current library acquisitions programme, is a programme of joint activities and increased co-operation between librarians and publishers. Both parties rely very heavily on each other and, therefore, CAPP is certain that talking is the way forward.

Secondly, there is one area of contention over the statistics in the report that is frequently being raised - the suggested increase in funding for

book and journal acquisition to reflect the growth in student numbers. Many librarians point out that journal acquisition is not affected by the rise in student numbers. To some extent, this is true, but much discussion has been taking place lately about the overlap between teaching and research. Over the last few years, the blur between teaching and research has grown. Traditionally, journals have been associated with research, and research with postgraduate students. However, increasingly, librarians have noticed that journals are being used by 3rd year undergraduates, who are producing mini-theses. An Oxbridge librarian recently observed that one of the university's specialist science lending libraries has become, used more frequently by undergraduates, as students have become unable to purchase books and journals of their own.

Library expenditure as a proportion of total university recurrent expenditure has been declining steadily over the last thirteen years and it now stands at less than 3 per cent. Even more importantly, the expenditure on library acquisitions as a percentage of total university recurrent spending is less than 1 per cent. With

student numbers increasing, libraries are being expected to achieve more and more. The library budget is being squeezed on all sides and funds for necessary investment in new technology are often being siphoned from the book budget. This is further eroding the level of library provision, at a time when the cost of books and periodicals is increasing.

One statement with which both publishers and librarians will agree is that the crisis facing university and college libraries is the result of years of declining investment, rapidly escalating student numbers and an information and technology explosion with which not even the best funded library can hope to keep pace. To prevent standards falling further, action must be taken immediately and the initiative must be a joint one between librarians and publishers.

For more information on the 1993 *CAPP Book and Journal Spending Report* or *Trends in Journal Subscriptions*, contact Claire Waddell, Information Executive at The Council of Academic and Professional Publishers, The Publishers Association on 071 580 6321 x 203.

### Swets' Report on receipt of 1994 subscription prices

We now have the final result of a survey we have carried out of 1994 price list receipt dates from our largest 278 publishers (turnovers US\$50,000 each) first published in *Newsletter on Serials Pricing Issues*, no.107, February 14, 1994.

March	1993	1
April	1993	1
May	1993	1
June	1993	11
July	1993	79
August	1993	87
September	1993	53
October	1993	27
November	1993	13
December	1993	3
January	1994	2

These show that 180 (64.75%) were received by the end of August and 260 (93.53%) by the end

of October, two important points in time for customers and agents.

With regard to price increases for 1994 our records showed that, based on all prices received by January 1994, the publishers' price increases for six of the main publishing countries were:

USA	9.19%
UK	12.00%
Holland	12.44%
France	2.34%
Germany	6.73%
Switzerland	10.77%

These are publishers' price increases in their own currencies and do not allow for the effect of exchange rate changes.

Hans Nouwen, Swets Subscription Services