STANDARDISATION OF LIBRARY STATISTICS

Roswitha Poll
Chair of ISO TC 46 SC 8

ABSTRACT
This paper describes the contribution of ISO committee TC 46 SC 8 ‘Quality – statistics and performance evaluation’ to the development of the new indicators and describes the rationale behind them.

The main topic of this conference is the project for new global library statistics. Since the end of 2005, the IFLA Section Statistics and Evaluation, the UNESCO Institute for Statistics and the ISO committee TC 46 SC 8 ‘Quality – statistics and performance evaluation’ have joined forces in order to develop and test a new set of statistical data that might be used by libraries worldwide. The final goal is that these statistics should be collected regularly on a national basis, so that there will be reliable and internationally comparable data of library services and library use.

ISO 2789: INTERNATIONAL LIBRARY STATISTICS

Comparison of statistical results between institutions or countries will never be possible, if the data and the data collection methods have not been defined and fixed carefully. Therefore, library statistics have been standardised within the frame of ISO, the International Organisation for Standardization. The standard ISO 2789 ‘Information and documentation – international library statistics’ standardises the terminology of library services and library use, gives detailed definitions and describes the methods of collecting and analysing the data with the aim of comparing and aggregating the results.


ISO 2789 is meant to cover all aspects of libraries: Size and type of the collections (whether traditional or electronic), number and type of users, the usage of library services, and the library’s resources (staff, space, funding). The last revisions show that the trend goes from collection-oriented to user-oriented data, taking up issues like reference services, library visits (physical and virtual visits), user training and events organised by the library. Special consideration is given to electronic collections and services and their use. The general demand for cost transparency and cost-effectiveness in libraries led to more detailed statistics of income and expenditure.
The first two editions of the standard prescribed that all statistics should be collected over the total year. As some data that seemed very important proved difficult to collect, in the 3rd edition the possibility of sampling was introduced. For instance for counting visits or reference questions, it can be sufficient to take two or more samples of ‘normal’ weeks over the year and gross up.

ISO 2789 gives rather detailed information of how to count collections, services and users in all types of libraries. There are 105 definitions and many more descriptions of counting procedures. It is improbable indeed that such detailed statistics could be collected worldwide in a comparable way. The project group decided to aim at a short data set, but to rely for these data on the definitions and methods given in ISO 2789, as the standard builds on international consensus and many countries are already using – or partially using – ISO 2789.

NEW GLOBAL LIBRARY STATISTICS

The request for ‘robust’ worldwide library data initiated with IFLA that needed reliable statistics for the World Summit on the Information Society. IFLA’s main interest was to show the general importance of libraries for society, while the UNESCO Institute for Statistics focused on the library’s role for information literacy in a country. UNESCO also stressed the importance of adjusting the new statistics to the possibilities of data collection in developing countries.

Thus, the demands on the new statistics were as follows. The data should:

- cover the full range of library services,
- consider new electronic services,
- show libraries’ role in society and culture,
- help to demonstrate the impact of libraries on the population,
- further comparison on a national and international basis,
- yield plausible results for publication and promotion,
- and, in spite of all that, consist of only a few measures, that would be easily available.

This, of course, was not an easy task. In spite of the large pool of well-tested and precisely defined statistics available in ISO 2789, it took about 18 months of discussions to choose the data set that was then tested in Latin America and the Caribbean. The main problem was to select measures for the electronic library services. Statistics for the number of loans or of volumes in the collection are well established in libraries. But though in most libraries electronic collections and services are developing rapidly, statistics for such collections and services are not yet in wide-spread use.

The projected new statistics try to consider all issues that are relevant for the role and impact of libraries today. The data are collected separately for public and academic libraries.
Accessibility of information via libraries:
- number of libraries
- number of seats for users
- weekly opening hours (4 groups: less than or equal to 20, 20 to 40, 40 to 60, over 60)
- percentage of libraries that offer Internet access for users
- percentage of libraries that offer an online catalogue
- percentage of libraries that offer a library website
- The three last-named data will be especially interesting for public libraries.

The collections that libraries offer
- number of volumes
- number of electronic serials subscriptions
- number of ebooks (titles)
- number of databases (purchased or licensed)

The number of volumes is the only measure for the traditional collection. ‘Volumes’ were preferred to ‘physical units’ (which would include all items in non-electronic form) in order to avoid counting e.g. microforms or audiovisual media.

Three measures were selected for the electronic collection, as it will be important to assess and compare the development of these collections in libraries over years.

The library’s cultural role
- number of cultural events organised by the library

The library’s educational role
- annual attendances at user training sessions

Library users
- number of registered users

The number of registered users was preferred to the number of active users (using library services during the last year), as data of registered users seemed to be more widely available.

Use of library services
- number of visits to the library premises
- number of loans
- number of downloads from the library’s electronic collection

The measure of ‘visits’ does not include the ‘virtual visits’, the accesses to the library’s website. Counting virtual visits has only recently been started in some countries, but the physical visits are well established in library statistics and are an important measure for showing the library’s importance as meeting and working place.
‘Downloads’ as measure for the use of the electronic collection were preferred to ‘sessions’ or ‘accesses’, as downloading shows that user have found items of interest when searching in databases or electronic journals.

The resources of libraries: staff
- number of employees (headcounts)
- of these female/male

The tests in Latin America and the Caribbean showed that more libraries knew their staff numbers expressed in heads than in FTE (full-time equivalent).

The resources of libraries: finances
- total operating expenditure
- of which staff costs
- of which expenditure on literature and information
- of which other costs

The questions relate to expenditure, not to income, as it would certainly be difficult to compare the different sources of library income on an international level. But the three subgroups of the yearly expenditure are defined and counted as such in many libraries.

The proposed new library statistics ask for only 22 data, of which 7 concern electronic collections or services. Following the discussion in the Montreal conference, one additional measure will be included, concerning the amount of training per year for library staff. Staff training is indeed the most important issue for the development and future-orientation of all types of libraries. Hopefully, the small set of 23 data, if used over time, will yield a reliable picture of library services and library use in a country.

The new statistics consider only public and academic libraries. All project partners did not see a possibility of collecting data about special or school libraries worldwide. The aim is that the questionnaire should be dealt with and filled out by the respective institution in each country that is responsible for collecting library statistics. Such institutions may be ministries (for culture, education or research), national statistical units, library associations or national libraries. Data of public and academic libraries in a country might be collected by different institutions, in different ways, and sometimes nobody feels responsible.

The project partners, when deciding on the final dataset for the new library statistics, did not expect that all these data would be directly available in all countries. Even in countries with high IT-development, measures for electronic library services are partly missing. It will probably take some time till the statistics have been adopted by all countries. But the project partners, from different viewpoints, recognised the need for uniform library statistics that can be collected and compared worldwide and can help to identify and promote the libraries’ role for literacy and information literacy, education and culture.