



BIALL ‘State of the Nation’ Survey December 2021

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BACKGROUND AND METHODOLOGY

The 'State of the Nation' survey follows on from the study conducted in May/June 2020, which produced a snapshot of:

- The immediate impact of COVID-19 on members' employment
- Organisation-wide responses to COVID-19
- Perceived longer-term impacts on the industry of COVID-19

Many questions are identical to that initial survey, to enable comparisons to be drawn on these topics.

Additional questions were added around:

- The current status of members' physical libraries
- Approaches to hybrid-working
- Uptake of BIALl's virtual activities
- Rating of, and comments on, BIALl's support since the start of the pandemic

As with the previous survey, an online methodology was adopted with questions scripted on Survey Monkey and a generic survey link sent to BIALl members registered on the Jisc-mail mailing list. Initial invites were sent on 18th October, with fieldwork closing on 12th November. In total, **191** responses were received – a slight fall from the May/June 2020 survey (200 responses).

Where results in a chart do not sum to 100%, this is either because the question allows for multiple responses or owing to rounding.

EXECUTIVE SUMMARY - 1

Although 2021 has been a year of great change for law firm librarians, particularly in terms of working practices, the prevalence of redundancy and furlough has remained very low on an individual member basis and impacts on pay are less keenly felt than in May/June 2020

- At the time of the survey, 7 in 10 physical libraries had returned to being fully open, rising to over 8 in 10 in the Academic sector and London and the South-East
- Levels of furlough (6%) and redundancy (1%) remain low, and the proportion of respondents reporting a cancelled or postponed pay rise (16%), or a reduction in pay (5%), has fallen sharply compared to the last survey
- Over the course of 2021, 89% of respondents have been directed to work from home with a further 53% then instructed to return to their physical library.
 - Academic librarians were less likely to have been directed to work from home and more likely to have been directed to return to their physical library. This aligns with the higher proportion of Commercial librarians reporting that hybrid working has been encouraged by their organisation (78%, compared to 50% of Academic librarian respondents)
 - Senior Managers and Managers were relatively more likely to have been directed to work from home, and less likely to have been instructed to return to the physical library

However, the impact of COVID-19 has fed through to organisational-level redundancies more acutely than was the case in the May/June survey

- 22% report redundancies in their organisation, compared to 2% in May/June 2020
- Nevertheless, the proportions reporting that their organisation has furloughed staff (34%, from 53%), frozen recruitment (22%, from 45%) and pay (15%, from 31%), and cancelled promotions (3%, from 10%), are much lower than last year

EXECUTIVE SUMMARY - 2

Sentiment has softened from last year's survey in terms of longer-term headcount reductions and teams being moved to cheaper locations

- Just 19% feel that a long-term impact of the pandemic will be reduced headcounts in law libraries – down from 37% in the May/June 2020 survey. 17% feel teams will be moved to cheaper locations – down from 29%
- Recent experiences with library resource budgets perhaps go some way to explain these changes: 65% stated that their library's resource budget had increased or remained the same in 2021, up from 55% in the May/June 2020 survey
- However, 91% – the same as in last year's survey – feel there will be a more pronounced shift towards virtual libraries; this sentiment is even stronger among Commercial sector librarians, who, as a consequence, are also relatively more likely to feel that hard copy collections will be reduced

The proportion of organisations providing support with personal wellbeing (59%, from 48%) and financial allowances for home working (40%, from 29%) has increased from last year's survey

- In contrast, fewer members report that their organisation has implemented flexible working hours (55%, from 65%) or reduced working hours (5%, from 13%) compared to the previous survey

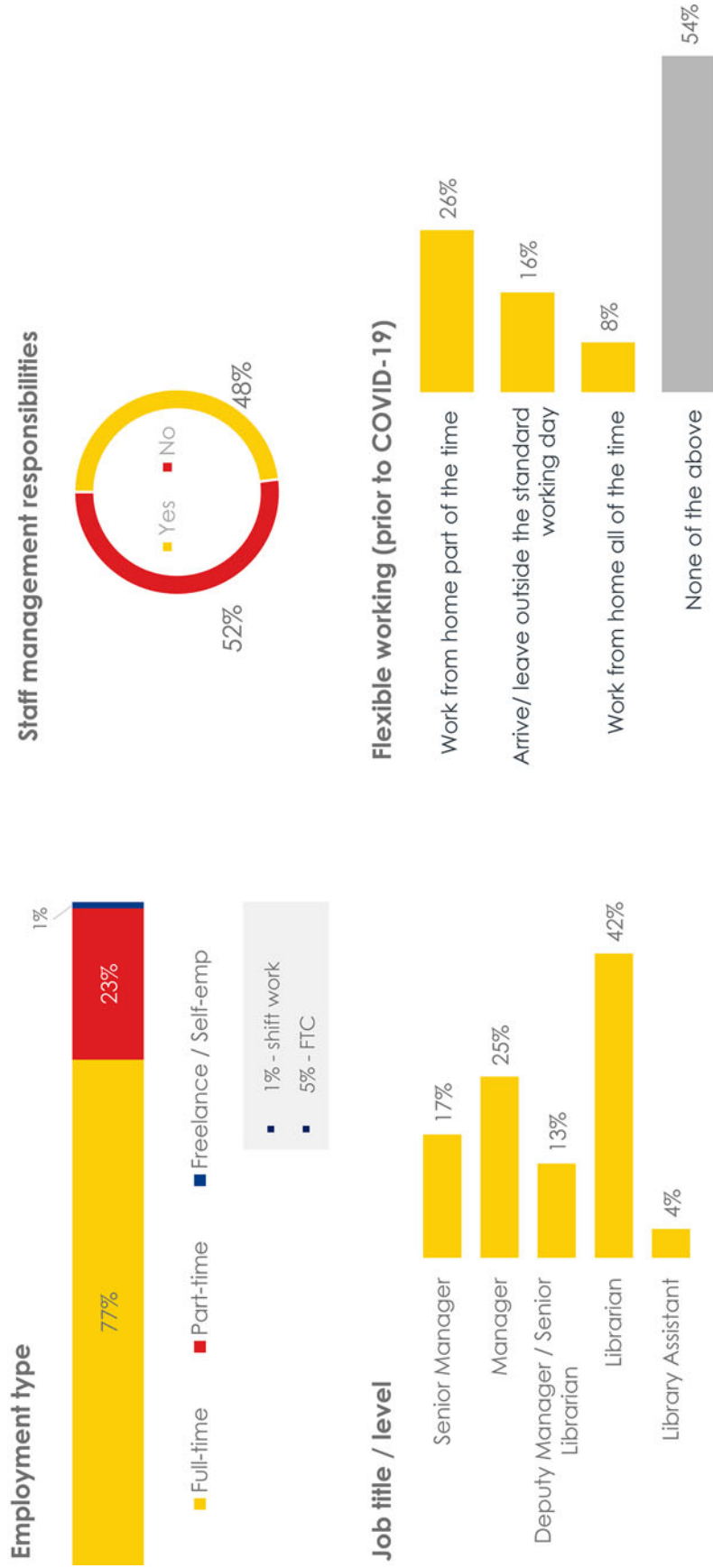
84% rated BIALL's support since the start of the pandemic as 'Excellent' or 'Good'

- 75% have participated in at least one virtual activity undertaken by BIALL over the last year
- A range of comments are provided outlining how members have felt supported, and suggestions for how BIALL could provide further support to members

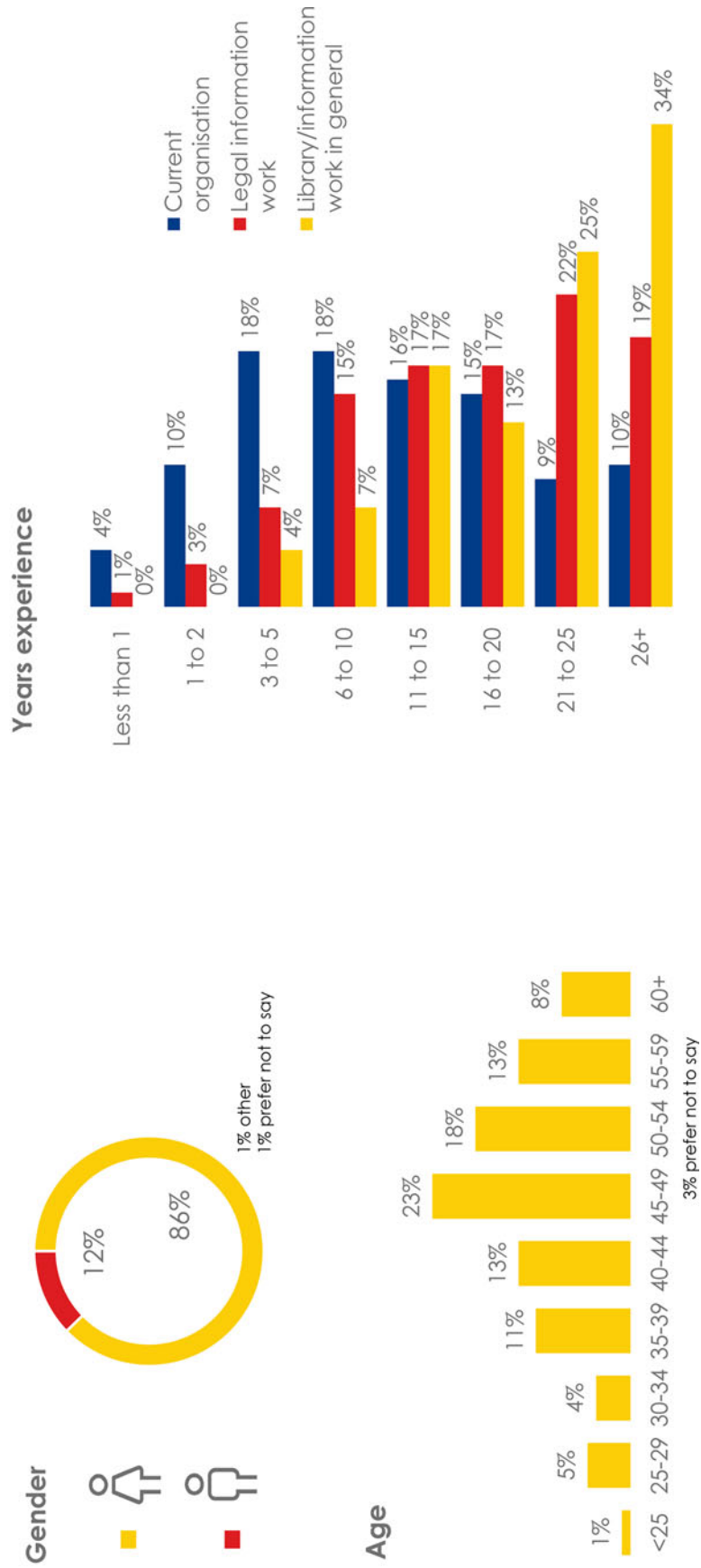


RESPONDENT PROFILE

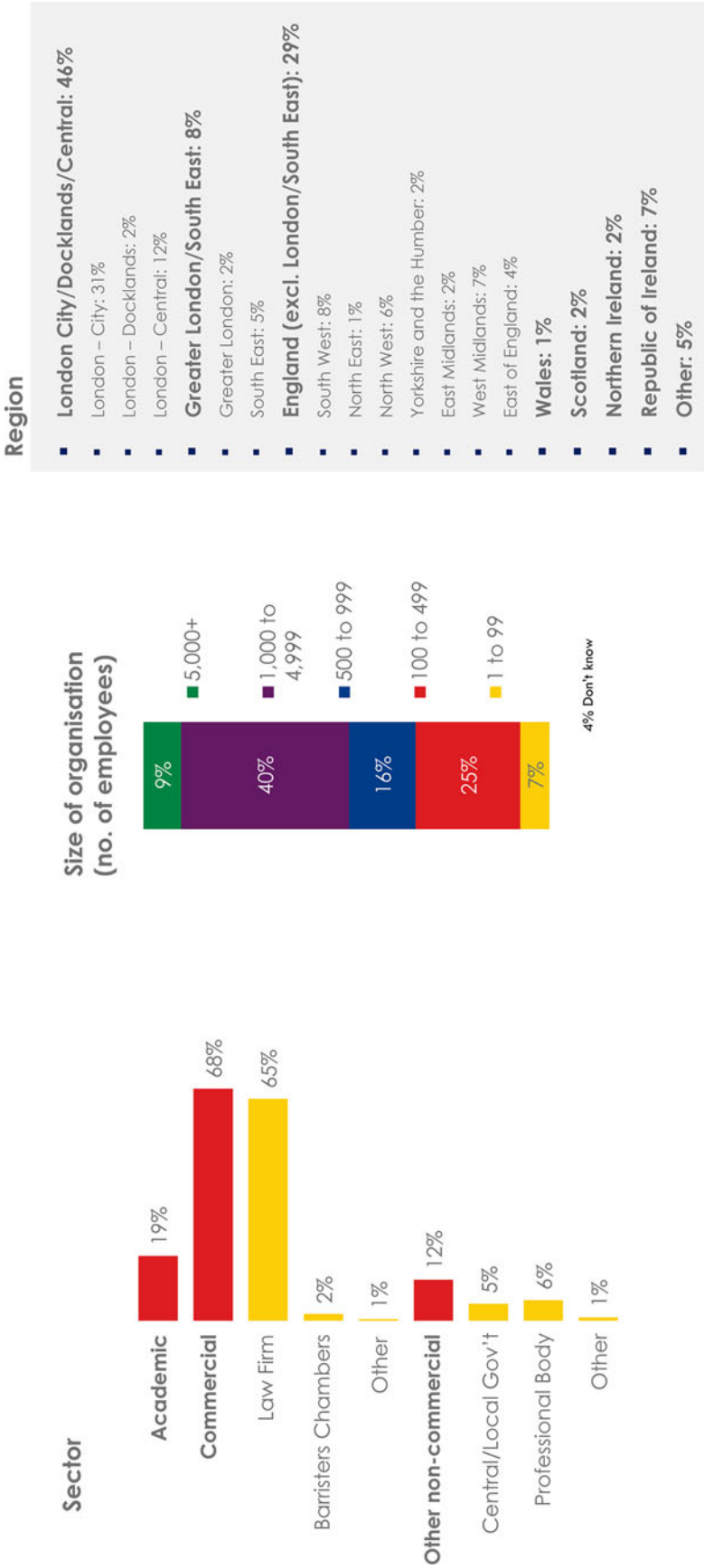
EMPLOYMENT PROFILE OF RESPONDENTS TO THE SURVEY



DEMOGRAPHIC PROFILE OF RESPONDENTS TO THE SURVEY



PROFILE OF ORGANISATIONS REPRESENTED IN THE SURVEY





FULL SURVEY RESULTS

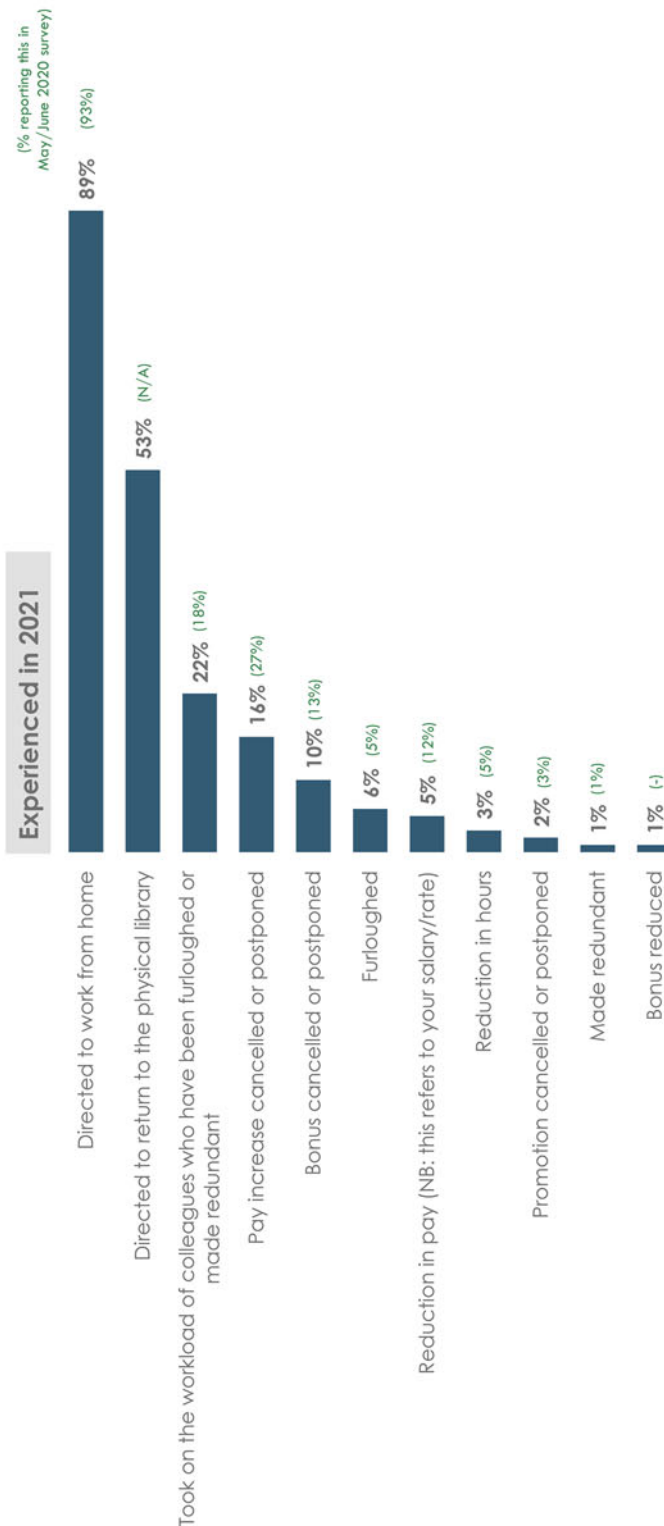
STATUS OF ORGANISATION'S PHYSICAL LIBRARY AT TIME OF SURVEY
At the time of the survey, 7 in 10 physical libraries had returned to being fully open – rising to over 8 in 10 in the Academic sector and London and the South-East. Two in five libraries in other non-commercial settings were only partially open at the time of this survey

Response	Total %	Sector			Location		
		Academic	Commercial	Other non-commercial	London (all) and SE England	Rest of UK	Republic of Ireland
Fully open	70%	81%	73%	55%	83%	67%	55%
Partially open	21%	13%	19%	40%	13%	23%	27%
Closed	2%	-	2%	-	-	4%	-
Other*	7%	6%	7%	5%	4%	7%	18%

*The most common Other response is that the organisation no longer has any physical libraries, and operates exclusively on a remote basis

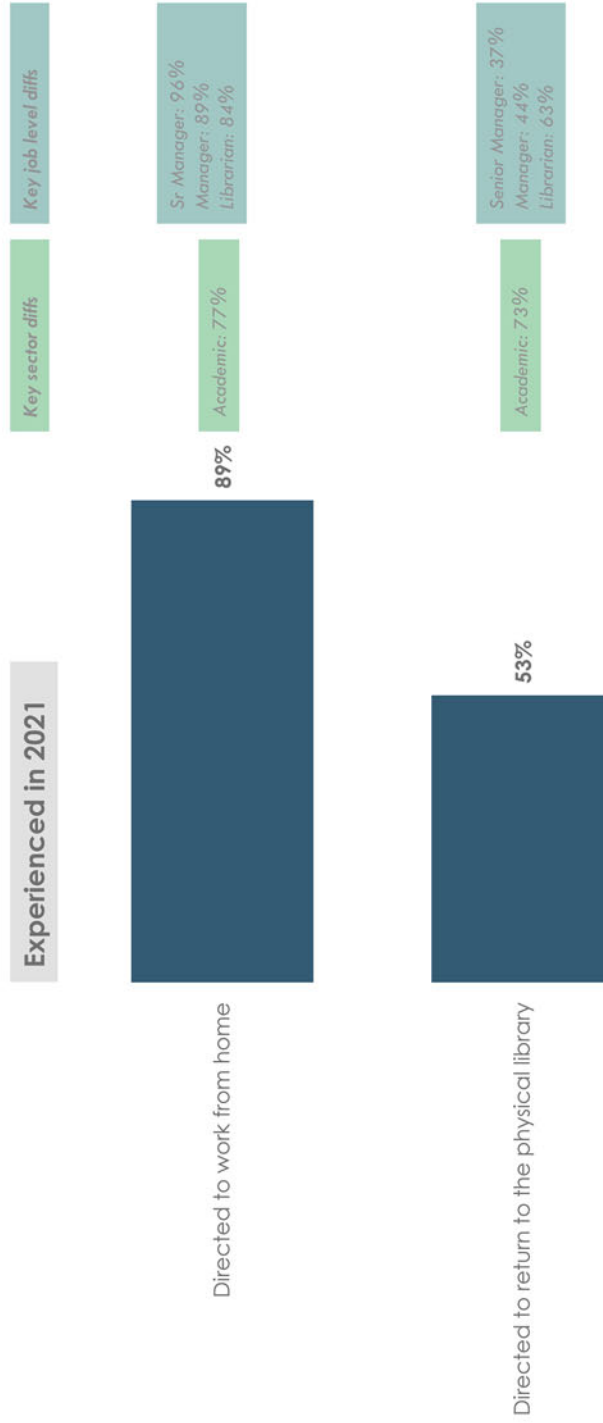
PERSONAL IMPACTS - 1

Levels of furlough and redundancy at the time of the survey were low, and in line with the levels recorded in the survey conducted during the first lockdown. Over half of respondents have been both directed to work from home and then return to their physical library over the course of 2021. Compared with the May/June 2020 survey, the % of respondents reporting that a pay increase has been cancelled or postponed, or a reduction in pay, has fallen sharply.



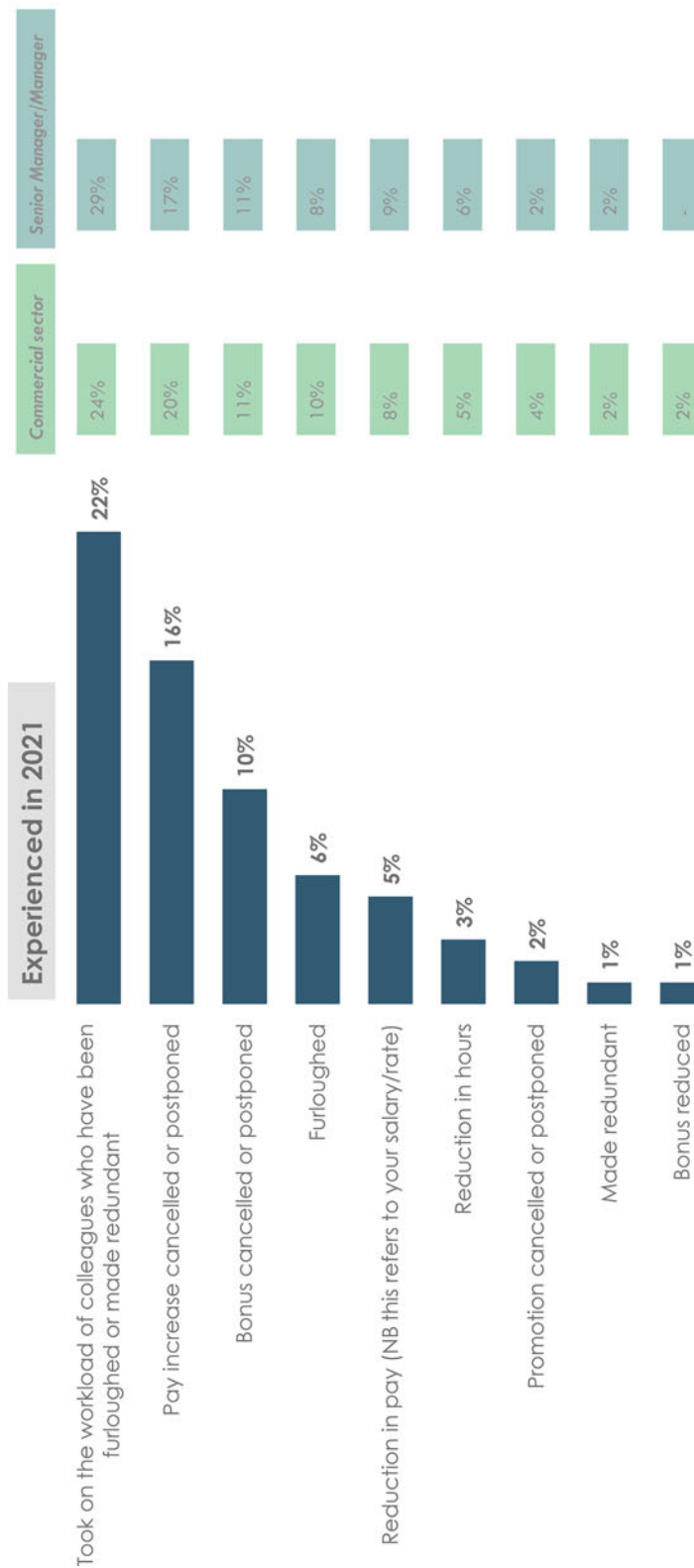
PERSONAL IMPACTS - 2

Compared with the overall averages, Academic librarians were less likely to have been directed to work from home and more likely to have been directed to return to their physical library, over the course of 2021. There is also a clear relationship between seniority and home/on-site working – the higher the level of seniority, the more likely to have been directed to work from home, and less likely to have been instructed to return to the physical library



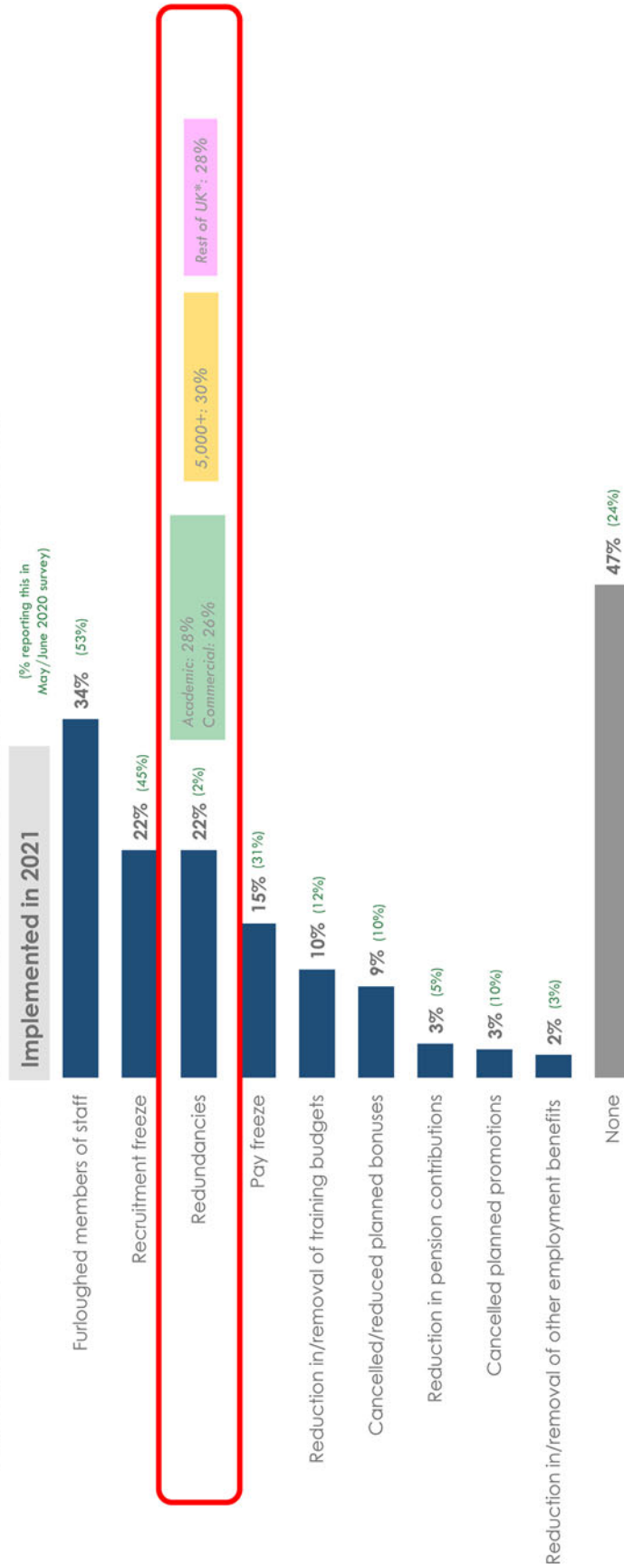
PERSONAL IMPACTS - 3

Impacts relating to workload, pay and job status were typically more prevalent among Commercial sector librarians and those in more senior positions



ORGANISATIONAL IMPACTS

Nearly half of respondents stated that their organisation had not implemented any of the actions shown below – almost twice the level of May/June 2020. As a result, the percentages reporting furloughing of staff, a recruitment freeze, pay freeze and cancellation of promotions are much lower than last year. In contrast, there has been an 11-fold increase in proportion of respondents reporting redundancies in their organisation, compared with May/June 2020 – particularly prevalent in the Academic and Commercial sectors, the largest organisations and UK organisations based outside of London and the South East



* All UK regions outside of London and the South East

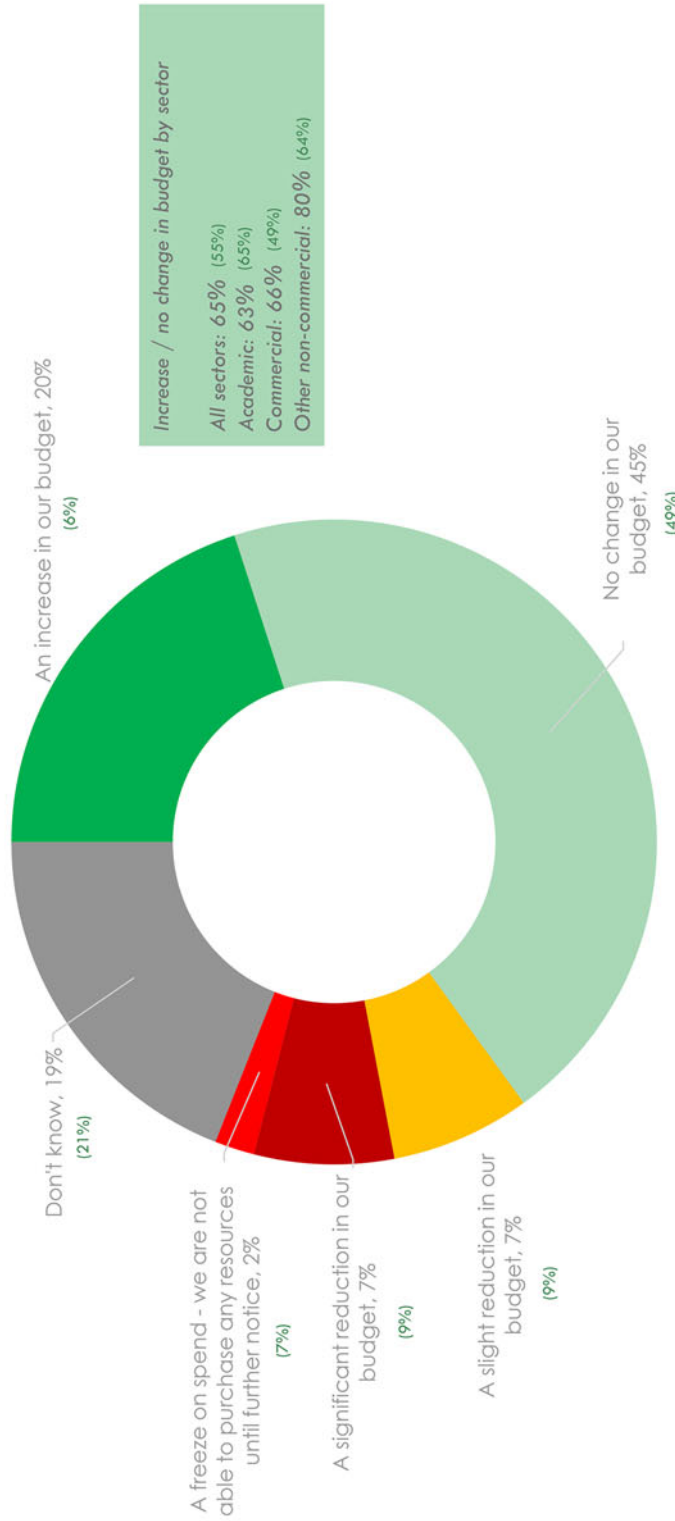
ORGANISATIONS' APPROACH TO HYBRID WORKING

7 in 10 respondents report that their organisation actively encourages hybrid working, however this is less pronounced in Academic environments and in smaller organisations

Impact	Total %	Sector			Size of organisation			
		Academic	Commercial	Other non-commercial	1-499	500-4,999	5,000+	
Hybrid working actively encouraged	70%	50%	78%	55%	57%	80%	80%	
Hybrid working permitted, but not actively encouraged	11%	9%	11%	20%	24%	7%	-	
Hybrid working only permitted on case-by-case basis	7%	22%	3%	15%	9%	3%	7%	
Hybrid working not permitted	-	-	-	-	-	-	-	
Other	11%	19%	9%	10%	9%	10%	13%	

2021 BUDGET FOR LIBRARY RESOURCES

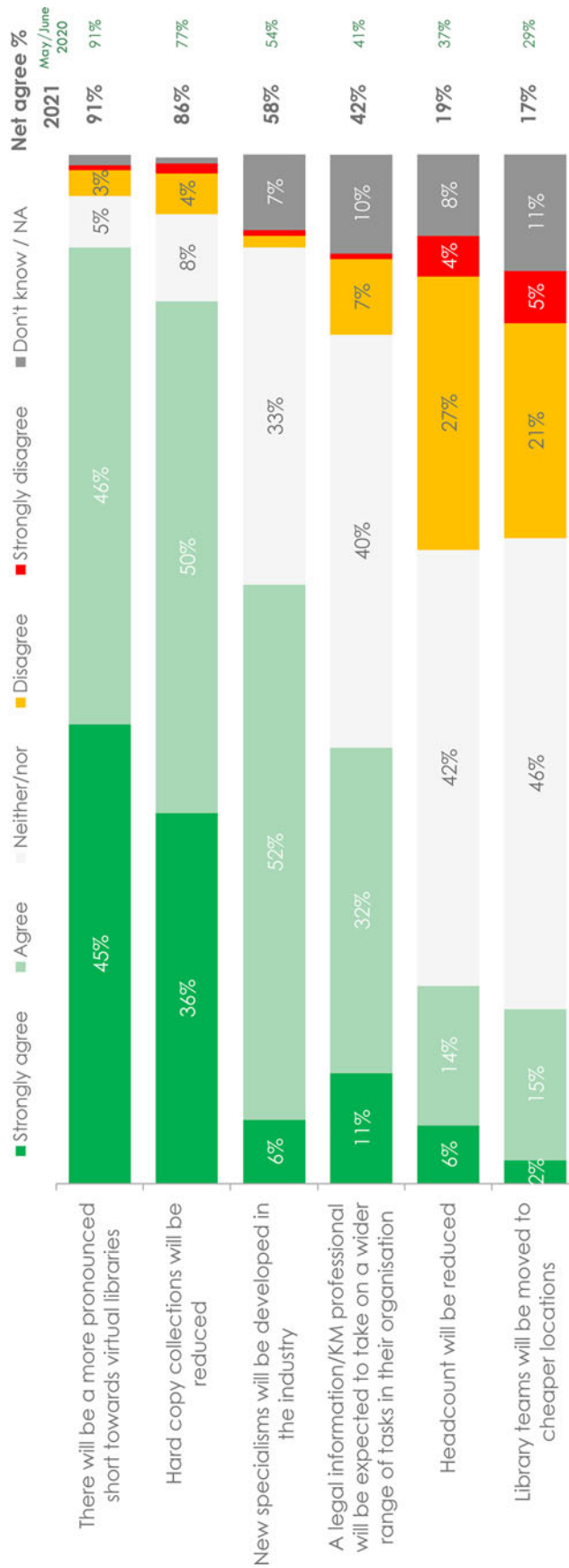
65% of respondents stated that their library's resource budget had increased or remained unchanged in 2021 – consistent across all sectors. This represents an improved picture from the May/June 2020 survey when 55% indicated a flat or increased library budget



(% reporting this in May/June 2020 survey)

PERCEIVED LONGER-TERM IMPACTS OF COVID-19 ON LEGAL LIBRARIES

Over 9 in 10 respondents – in line with the May/June 2020 survey – feel there will be a more pronounced shift towards virtual libraries as a result of COVID-19. The % who feel hard copy collections will be reduced has increased from the last survey, but in contrast, sentiment has softened towards headcount being reduced and moving teams to cheaper locations



For ease of reading, labels are not shown for results of <2%

PERCEIVED LONGER-TERM IMPACTS – BY SECTOR AND LOCATION

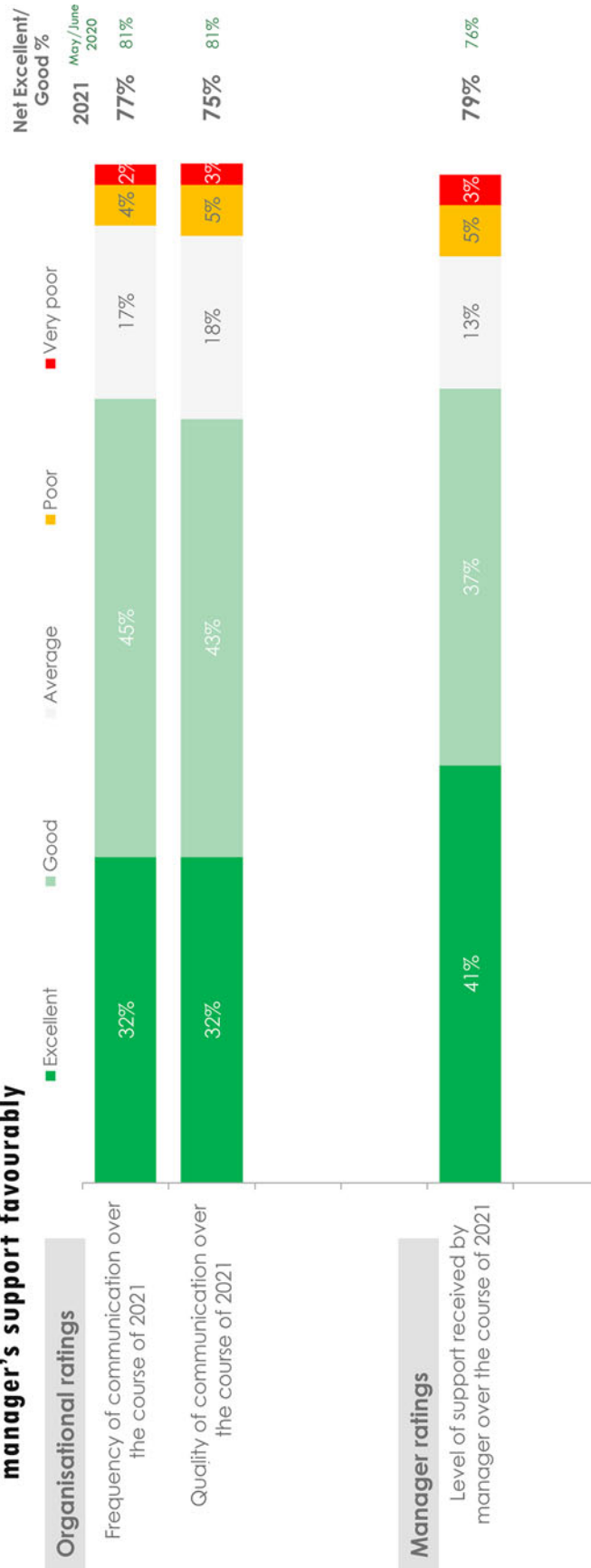
Nearly all Commercial sector librarians agreed that there will be a more pronounced shift towards virtual libraries and hard copy collections will be reduced as a result of the pandemic. Agreement on these impacts was also higher among UK librarians based outside of London and the South East.

Impact	Total Net Agree %	Sector			Location		
		Academic	Commercial	Other non-commercial	London (all) and SE England	Rest of UK	Republic of Ireland
More pronounced shift towards virtual libraries	91%	87%	96%	75%	91%	98%	82%
Hard copy collections will be reduced	86%	78%	94%	60%	87%	88%	82%
New specialisms will be developed in the industry	58%	53%	63%	55%	65%	51%	55%
Expected to take on a wider range of tasks	42%	38%	44%	45%	44%	40%	45%
Headcount will be reduced	19%	25%	18%	25%	19%	25%	18%
Library teams moved to cheaper locations	17%	13%	19%	10%	21%	18%	-

SUPPORT AND COMMUNICATION

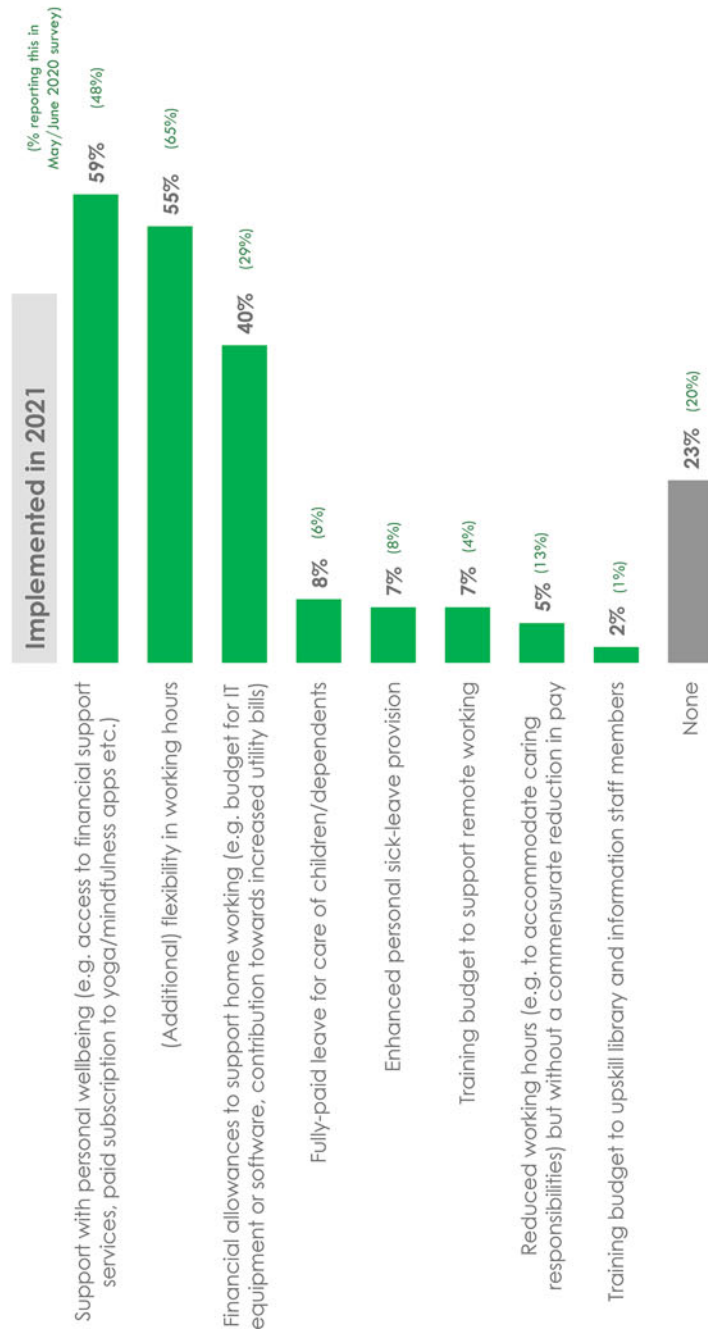
There are slight falls, compared with the May/June survey, in the % who rate the quality and frequency of their organisation's communication as excellent or good – however, it is still rated positively by around 3 in 4 respondents.

In contrast, there is a slight uptick compared with the previous survey in the proportion rating their manager's support favourably



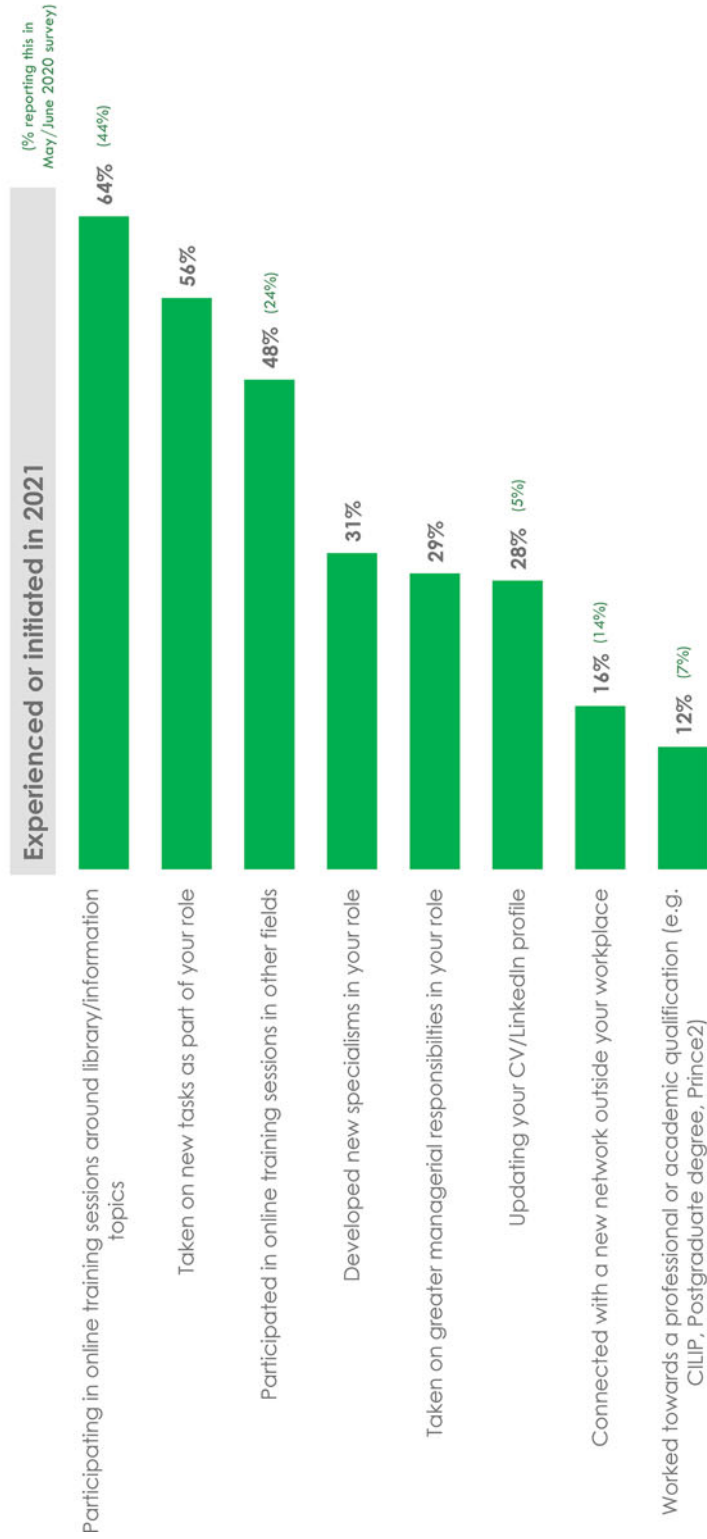
SUPPORT IMPLEMENTED BY ORGANISATIONS

The proportion of respondents reporting that their organisation has provided support with personal wellbeing and financial allowances to support home working has increased from the May/June 2020 survey. In contrast, there is a fall from the last survey in the % stating their organisation has implemented flexibility and reductions in working hours



PERSONAL/CAREER DEVELOPMENT ACTIVITY IN 2021

Over half of respondents have participated in online training on library/information topics or taken on new tasks as part of their role, over the course of this calendar year. There is an uptick in online training – both on library/information topics and in other fields – compared to the May/June 2020, whilst the proportion having updated their CV or LinkedIn profile has increased from 5% to 28% compared to the previous survey



BIALL ACTIVITIES

3 in 4 respondents have participated in at least one BIALl virtual activity over the last 12 months, with completing previous BIALl surveys and attending the annual conference most common. Around 1 in 6 participated in SIGs, online training and coffee catch-ups

