



COVID-19 Industry Survey

June 2020

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BACKGROUND AND METHODOLOGY

Given the global upheaval generated by the COVID-19 pandemic, it felt neither appropriate, nor relevant, to run the annual BIALL salary survey at this present time. In its place, a much shorter survey was developed to produce a snapshot of:

- The immediate impact of COVID-19 on members' employment
- Organisation-wide responses to COVID-19
 - The impact on library budgets
 - How members have been supported by their organisations
 - Case studies of where organisations have gone over-and-above in their response
- Perceived longer-term impacts on the industry of COVID-19
- How members have embraced personal development activity during this time

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 20th May, with fieldwork closing on 1st June. In total, **200** completed responses were received.

The survey also asked members to detail any ways in which BIALL could best support them – both now and over the coming months. Fifty responses were received to this question, covering a wide range of areas. These will now be reviewed by BIALL Council and any new measures or initiatives communicated in due course.

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

EXECUTIVE SUMMARY - 1

This snapshot survey has identified that the legal library/information management industry has, at this present time, largely weathered the most negative effects of COVID-19

- Only 5% of respondents reported they had been furloughed, despite furlough being used more widely in 53% of organisations
- Redundancies have been thankfully even less common: only 1% responding to the survey experienced redundancy themselves, and it was only reported to be used in 2% of organisations
- Some segments have been disproportionately affected, however. Part-time employees are twice as likely (compared to the overall level) to have been furloughed (10%) and experience a reduction in hours (10%). Those classifying their level as Librarian are also more likely to have been furloughed (8%)
- Although virtually all respondents unaffected by furlough or redundancy were directed to work at home, those working in a Commercial setting were relatively more likely to experience financial and workload impacts such as pay increases being cancelled/postponed (38%), taking on increased workloads (24%) and reductions in pay (18%). Respondents at the various managerial levels also over-index on these impacts.

Over half (55%) reported no change – or even an increase – in their library resource budget as a result of COVID-19

- This rises to two-thirds of Academic (65%) and Other Non-commercial (64%) organisations
- In contrast, a quarter (24%) of the smallest organisations (those with 1-99 employees) enforced a budget freeze

EXECUTIVE SUMMARY - 2

A vast majority of respondents (91%) predict that COVID-19 will lead to a more pronounced shift towards virtual libraries

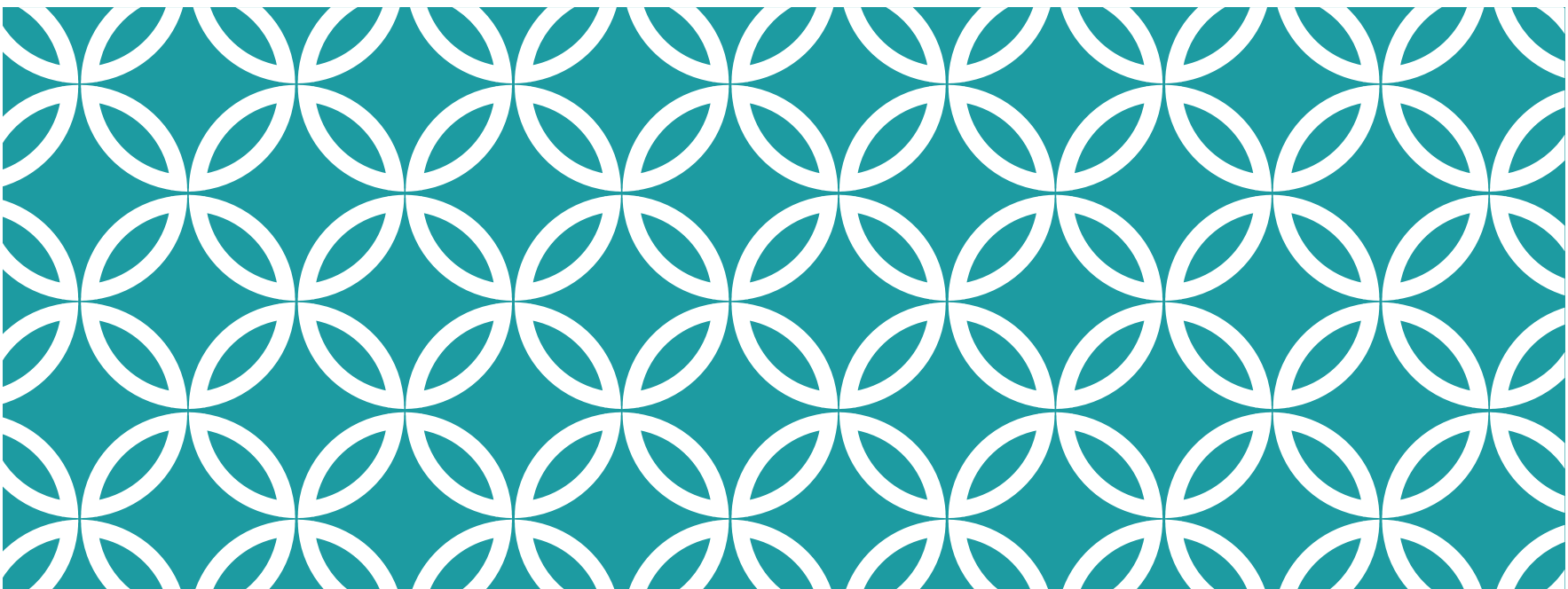
- All Academic sector respondents believe this will be the case; this sector is also the most pessimistic about future headcount (58% state it will be reduced, vs. 37% overall)
- Three-in-four (77%) expect hard copy collections to be reduced – higher (84%) among those working in a Commercial setting. UK-based respondents outside of London and the South East (87%) are also more likely to believe this will transpire – in addition, this group express a higher level of agreement in their belief that headcount will fall (47%) and teams moved to cheaper locations (35%, vs 29% overall)

81% believe their organisation has communicated well during this recent period – both in terms of the frequency and quality of communication – whilst 76% provide positive ratings for the level of support provided by their manager

- Those working in mid-sized organisations (500-999 employees) were particularly positive about these aspects; in contrast, ratings were markedly lower among those working for the smallest organisations (1-99 employees)

In a similar vein, 80% of respondents detail additional ways in which their organisation has supported staff in recent months, with flexibility in working hours (65%), personal wellbeing initiatives (48%) and financial allowances to support home working (29%) most common

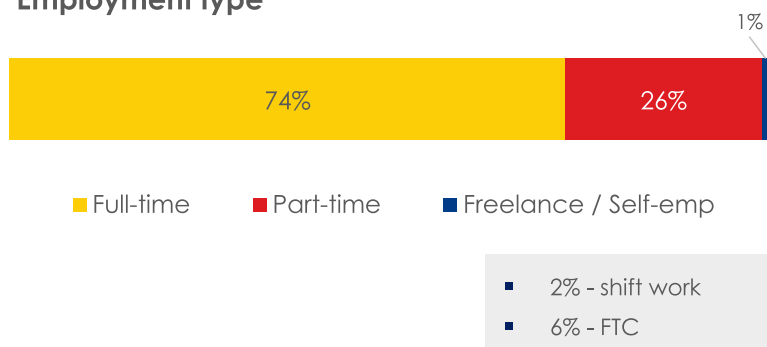
- This aligns with the many case studies left by respondents detailing how their organisation has gone ‘above and beyond’ in supporting their library and information staff in recent months



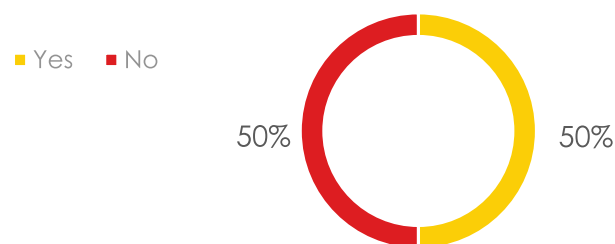
RESPONDENT PROFILE

EMPLOYMENT PROFILE OF RESPONDENTS TO THE SURVEY

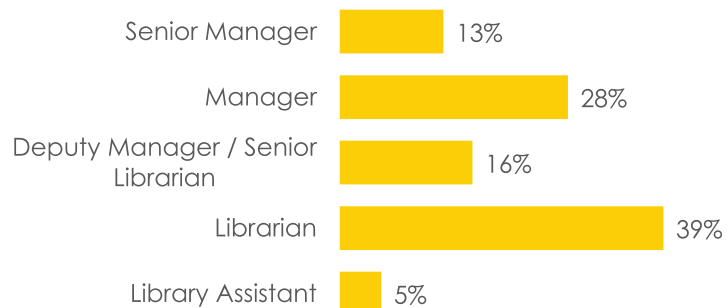
Employment type



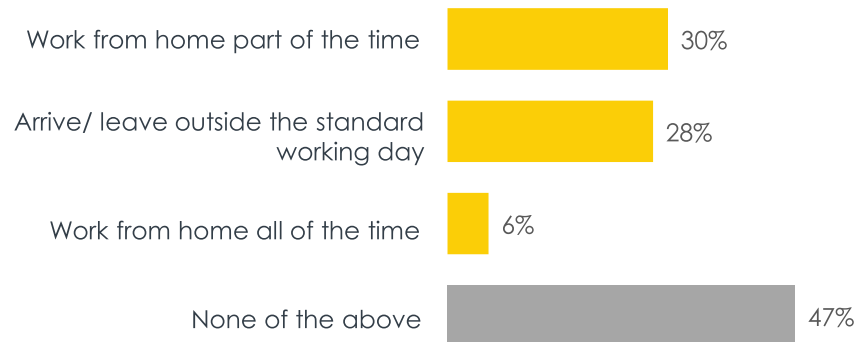
Staff management responsibilities



Job title / level

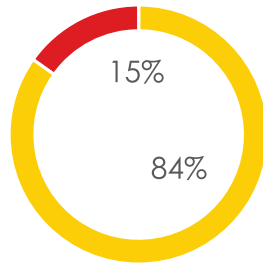
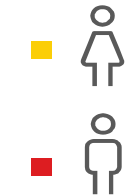


Flexible working (prior to COVID-19)



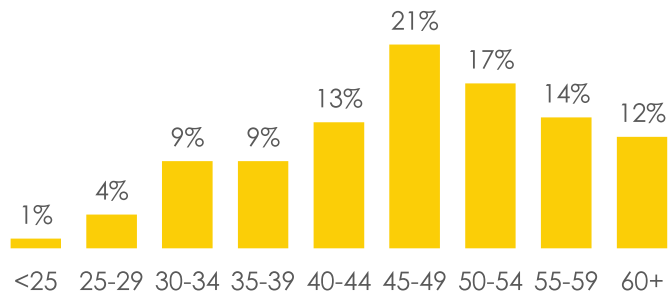
DEMOGRAPHIC PROFILE OF RESPONDENTS TO THE SURVEY

Gender



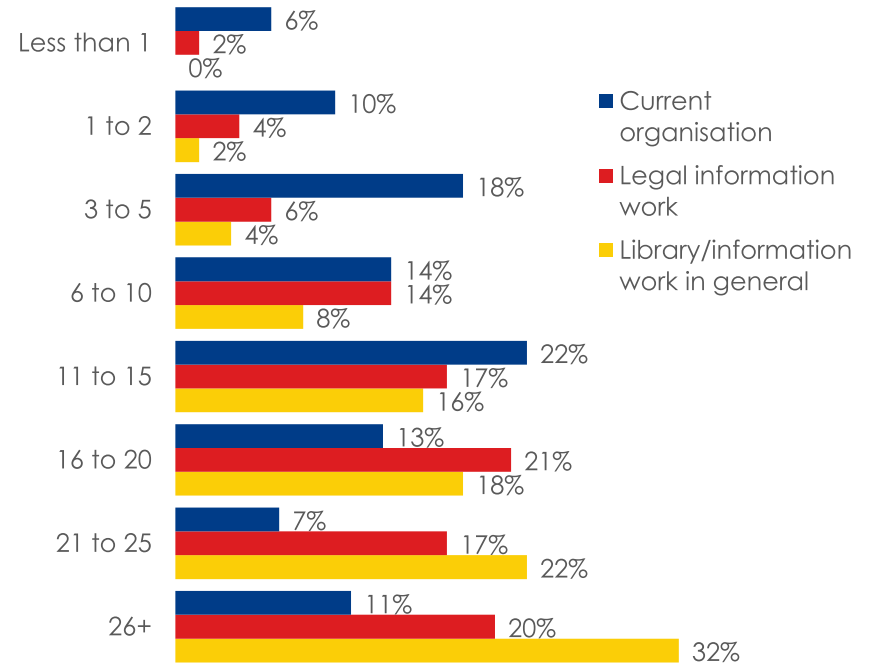
1% prefer not to say

Age

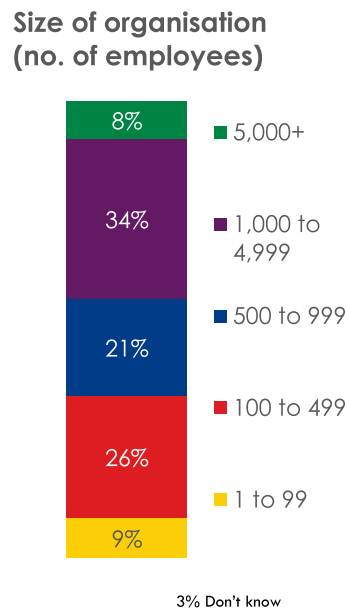
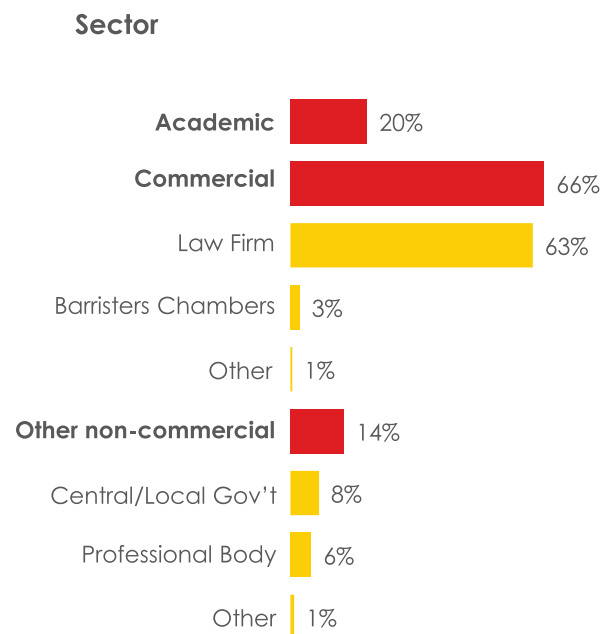


2% prefer not to say

Years experience

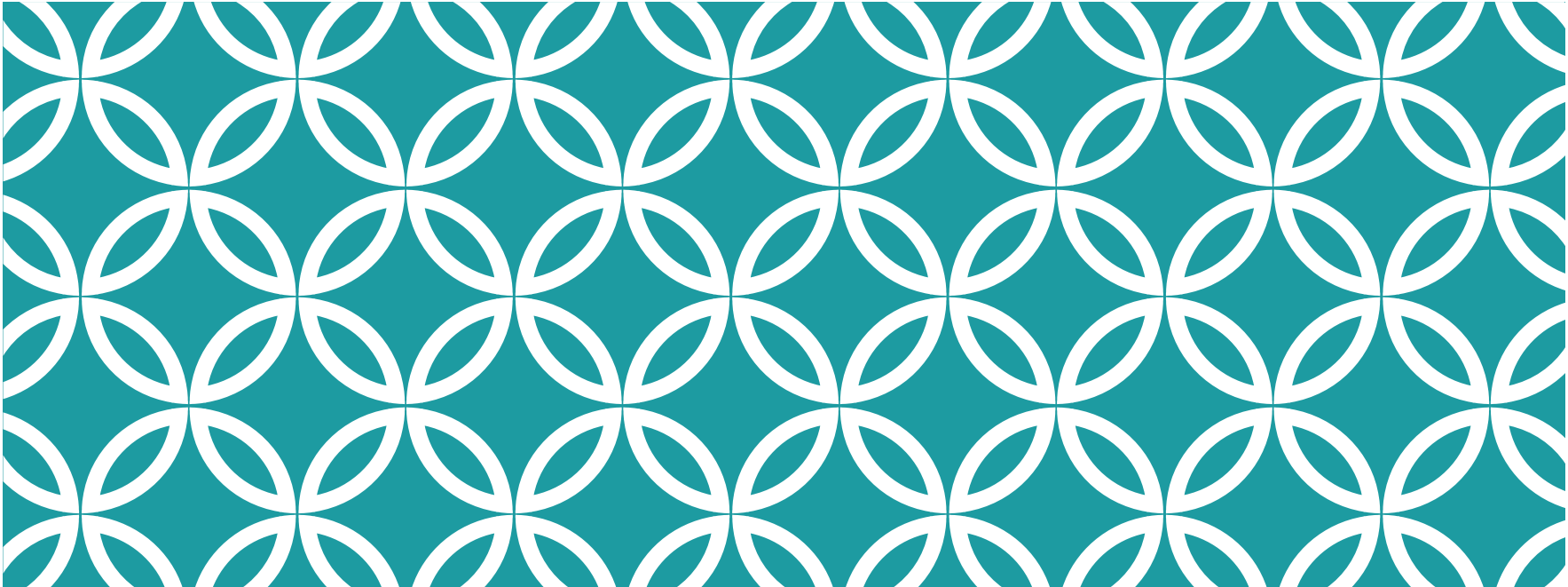


PROFILE OF ORGANISATIONS REPRESENTED IN THE SURVEY



Region

- **London City/Docklands/Central: 49%**
- London – City: 32%
- London – Docklands: 2%
- London – Central: 15%
- **Greater London/South East: 9%**
- Greater London: 3%
- South East: 6%
- **England (excl. London/South East): 24%**
- South West: 5%
- North East: 1%
- North West: 6%
- Yorkshire and the Humber: 2%
- East Midlands: 2%
- West Midlands: 4%
- East of England: 4%
- **Wales: 0.5%**
- **Scotland: 3%**
- **Northern Ireland: 2%**
- **Republic of Ireland: 11%**
- **Other: 6%**



FULL SURVEY RESULTS

STATUS OF ORGANISATION’S PHYSICAL LIBRARY AT TIME OF SURVEY

At the time of the survey, virtually all Academic law libraries remained closed; around one in six libraries in other settings remained open – at least partially – during lockdown.

Response	Total %	Sector			Location		
		Academic	Commercial	Other non-commercial	London (all) and SE England	Rest of UK	Republic of Ireland
Remains closed	83%	98%	82%	74%	88%	89%	71%
Remained open – at least partially – during lockdown	13%	3%	16%	15%	12%	11%	14%
Previously closed – but now partially reopen	3%	-	2%	11%	-	-	14%
Previously closed – but now fully reopen	1%	-	1%	-	-	-	-

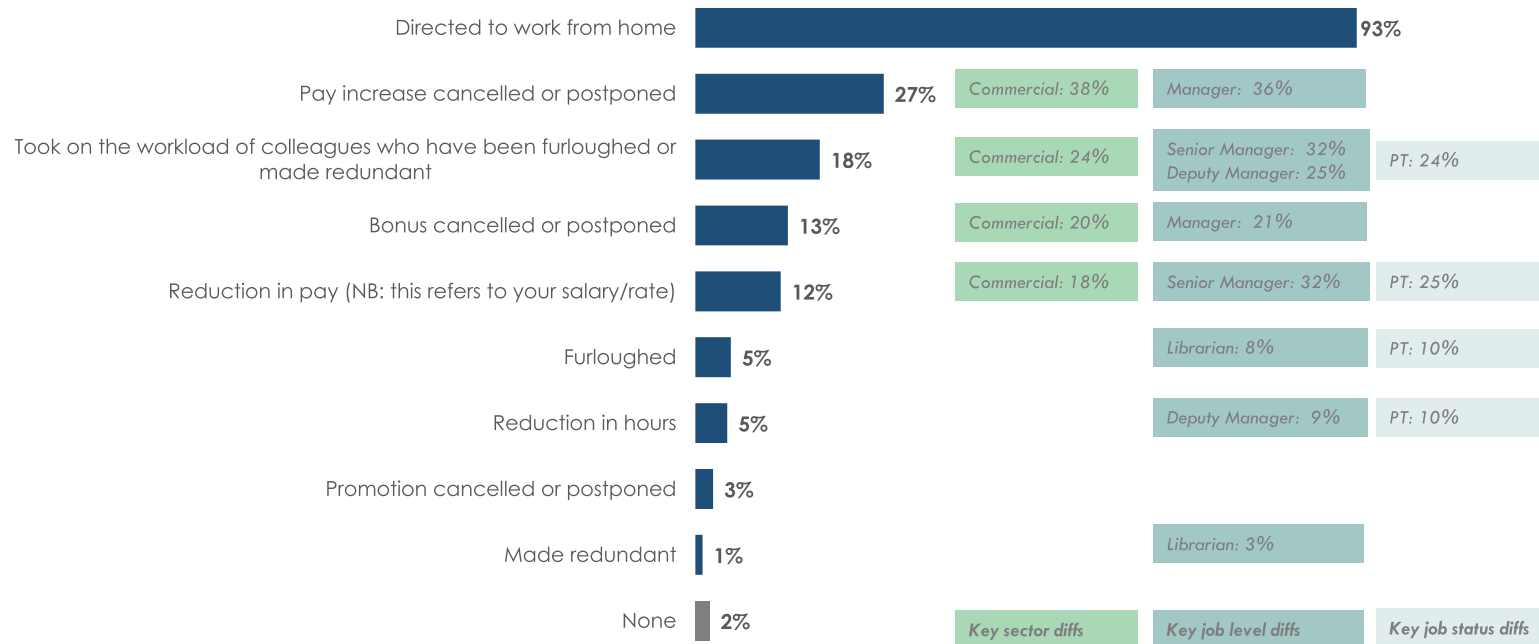
PERSONAL IMPACTS

Levels of furlough and redundancy at the time of the survey were low; virtually all respondents unaffected by furlough or redundancy were directed to work at home.

Those working in a Commercial setting and those at a managerial level were more likely to experience financial and workload impacts.

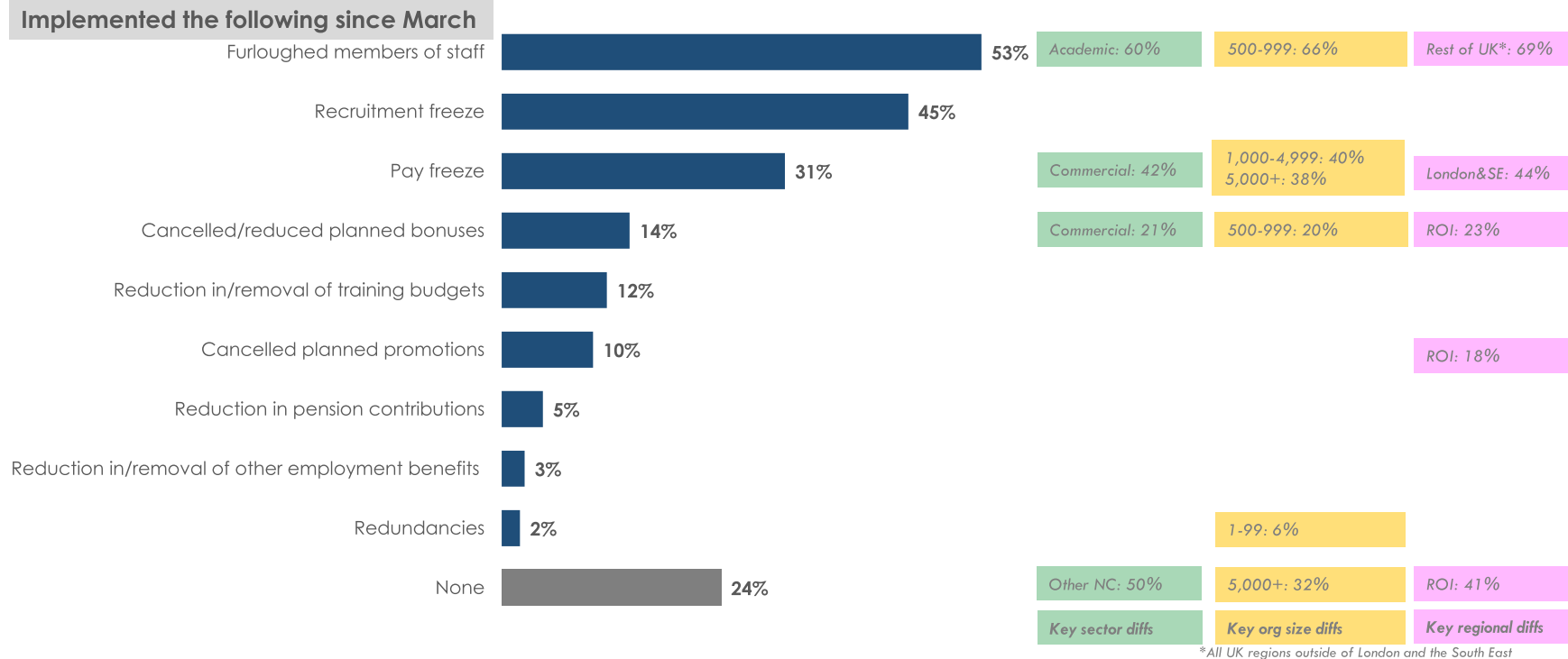
PT employees were disproportionately affected across many of the impacts, including furlough and a reduction in hours.

Experienced since March



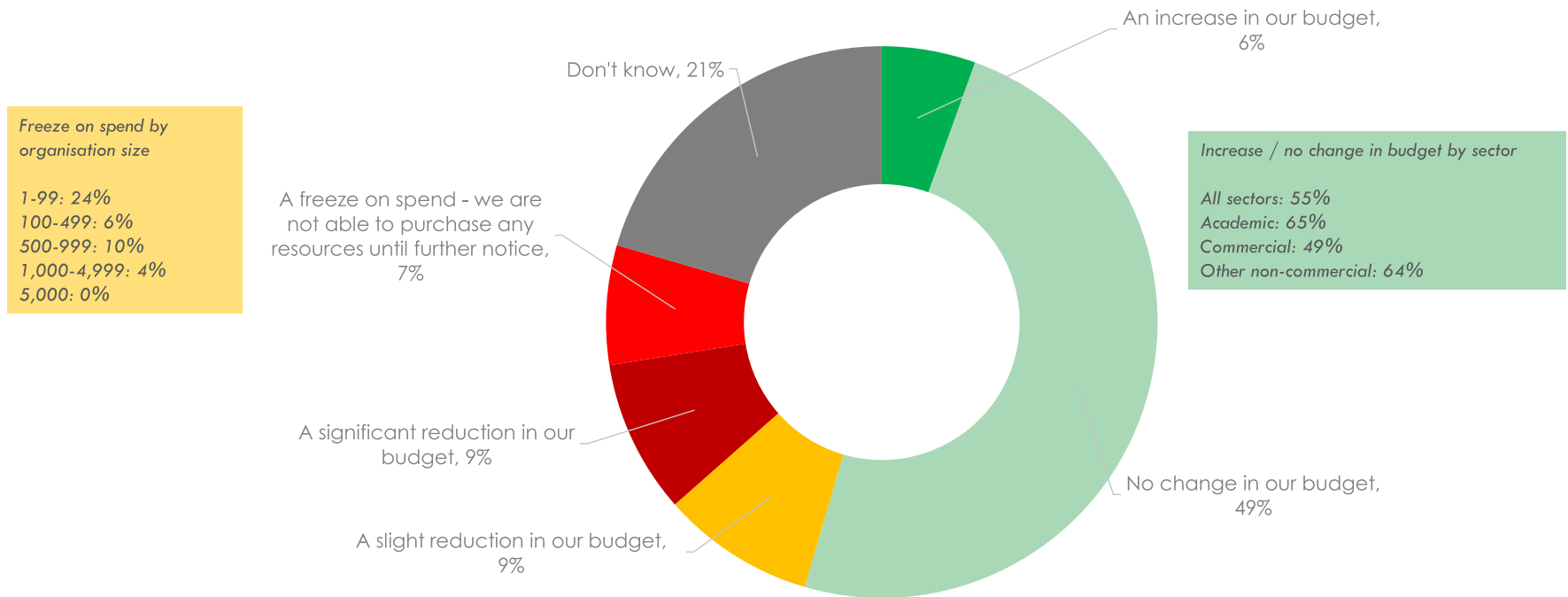
ORGANISATIONAL IMPACTS

Over half of respondents reported that their organisation has furloughed members of staff – this is higher in the Academic sector, mid-size organisations and those based outside of London and the South East. Recruitment and pay freezes have also been commonly implemented – the latter particularly pronounced in Commercial settings, larger organisations and those located in London/SE England. Only a tiny minority indicated that their organisation has made redundancies, although this level is higher among the smallest organisations.



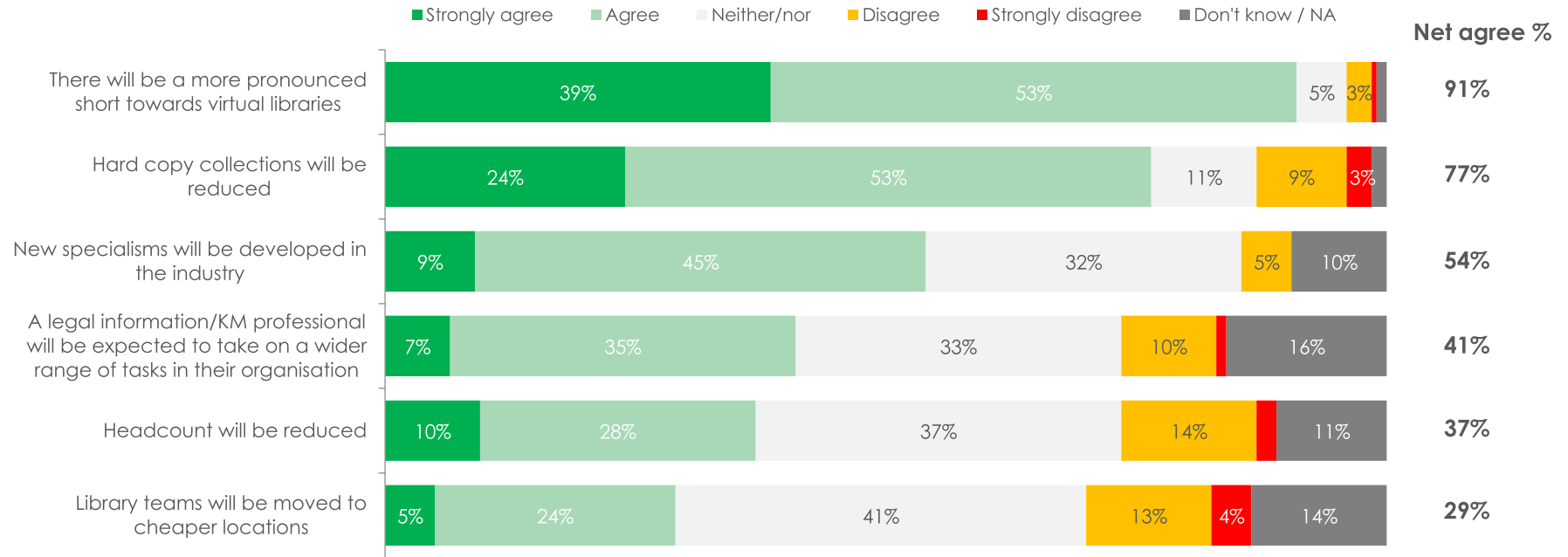
IMPACT OF COVID-19 ON LIBRARY'S BUDGET FOR RESOURCES

At the time of the survey, over half reported no change – or even an increase – in their library resource budget as a result of COVID-19; this rises to two-thirds of academic and other non-commercial organisations. In contrast, a quarter of the smallest legal organisations (with 1-99 employees) enforced a budget freeze.



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

Over three in four respondents believe there will be a more pronounced shift towards virtual libraries and a reduction in hard copy collections as a result of COVID-19. In contrast, fewer than two in five expect headcount to be reduced and for library teams to move to cheaper locations.



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

PERCEIVED LONGER-TERM IMPACTS – BY SECTOR AND LOCATION

All respondents from an Academic setting expect a more pronounced shift towards virtual libraries and are most pessimistic about future headcount.

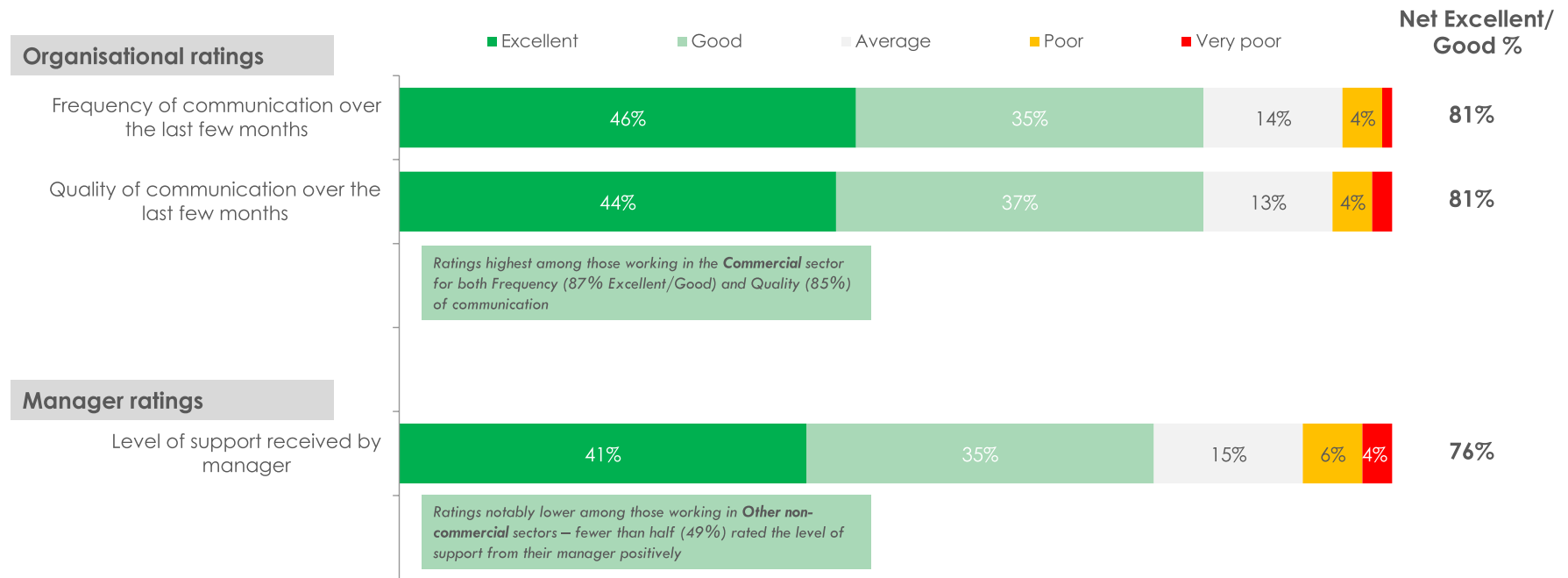
Respondents from a Commercial setting are most likely to predict that hard copy collections will be reduced, staff expected to take on a wider range of tasks, and that teams will be moved to cheaper locations.

UK-based respondents outside London/SE are relatively more likely to agree with many of the statements.

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%	100%	92%	75%	92%	93%	82%
Hard copy collections will be reduced	77%	78%	84%	39%	78%	87%	50%
New specialisms will be developed in the industry	54%	60%	54%	46%	54%	58%	41%
Expected to take on a wider range of tasks	41%	33%	44%	39%	41%	40%	41%
Headcount will be reduced	37%	58%	35%	18%	34%	47%	27%
Library teams moved to cheaper locations	29%	18%	34%	21%	31%	35%	14%

SUPPORT AND COMMUNICATION

Over three in four respondents rated positively the frequency and quality of organisational communications, and the level of support received by their manager, over recent months. Communication was particularly well-rated among those working in a Commercial setting.



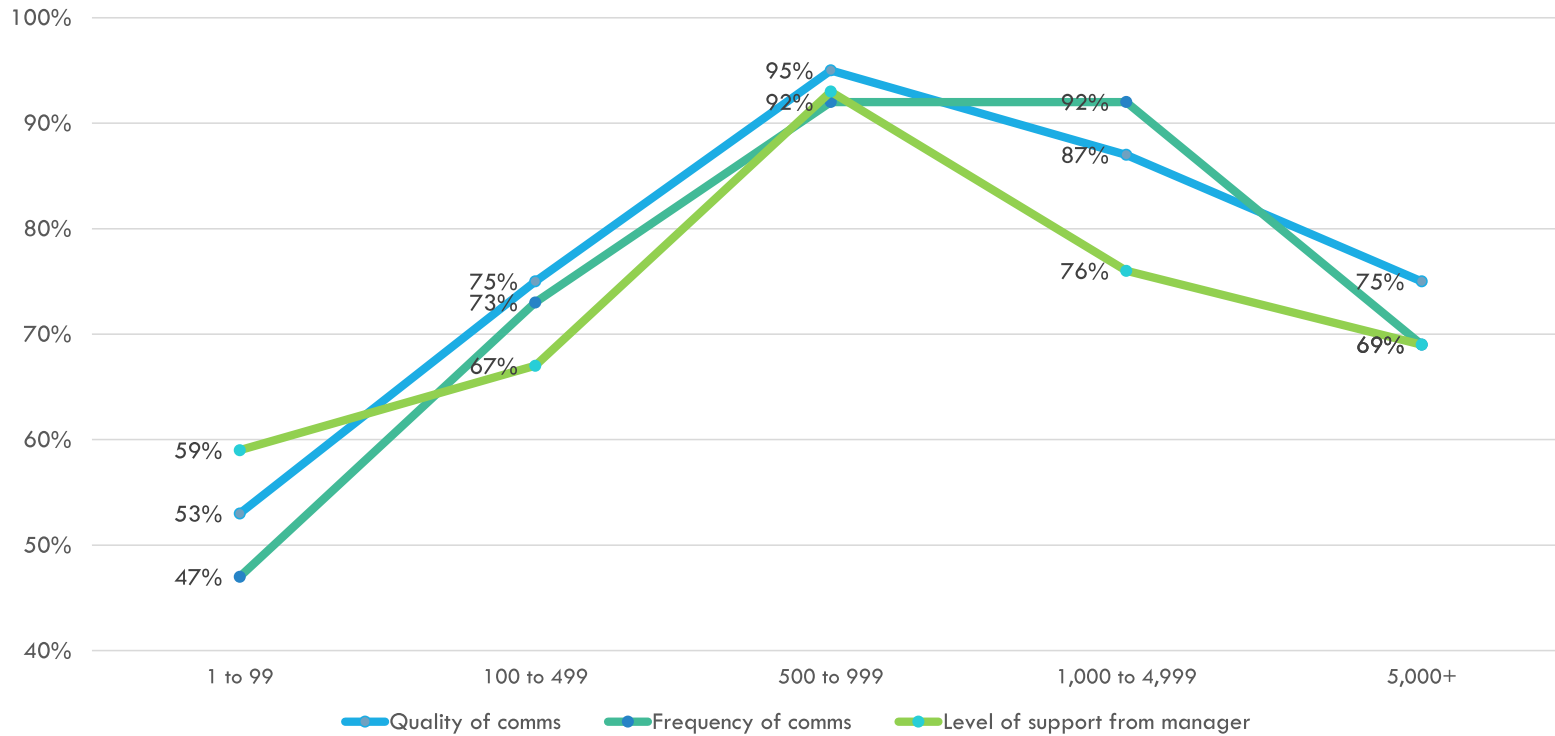
For ease of reading, labels are not shown for results of <2%

SUPPORT AND COMMUNICATION – BY ORGANISATION SIZE

Communication and managerial support was rated highly by virtually all respondents working in mid-sized (500 to 999 employees) organisations.

In contrast, ratings were notably lower among those working for smaller organisations.

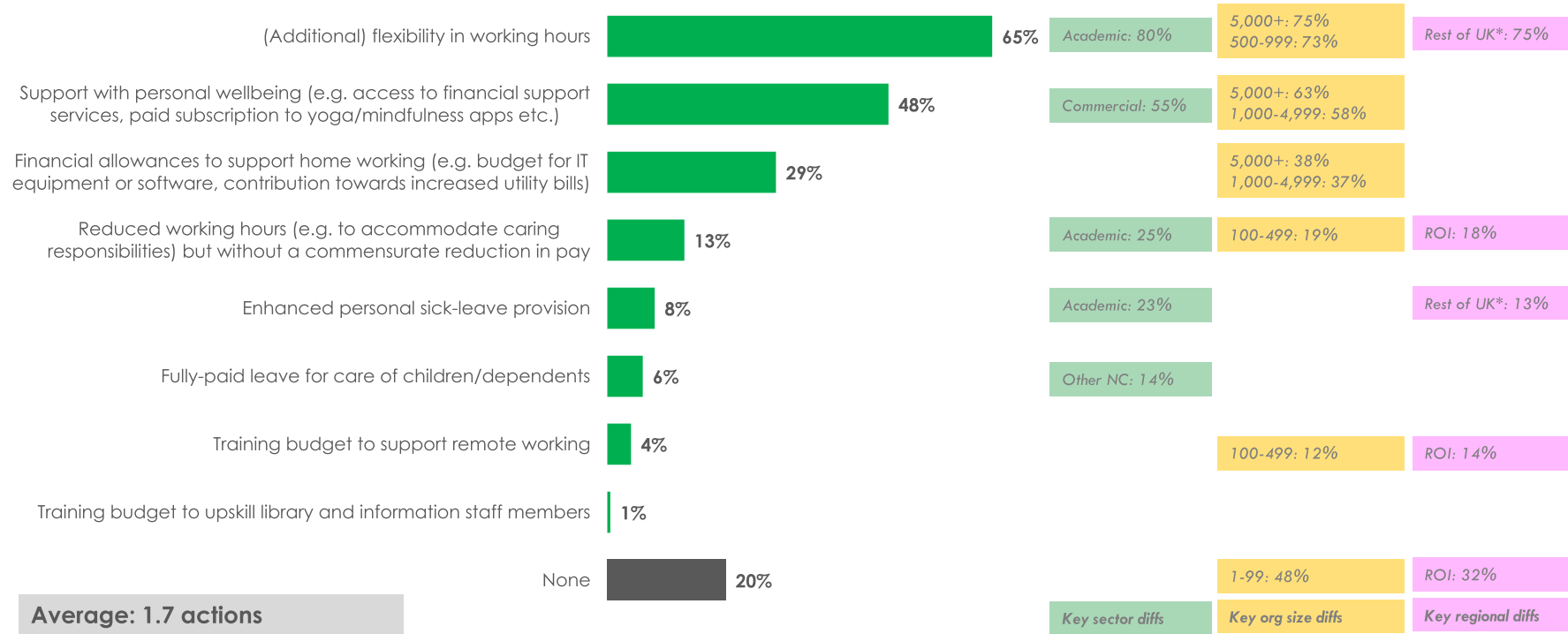
% rating each aspect as Excellent/Good



SUPPORT IMPLEMENTED BY ORGANISATIONS

Eight in ten respondents reported additional employee support activity implemented by their organisation as a result of COVID-19.

Additional flexibility in working hours was commonly reported – particularly among those in an Academic setting – whilst the largest organisations were more likely to support with personal wellbeing and provide financial allowances to support home working.



PERSONAL DEVELOPMENT ACTIVITY UNDERTAKEN IN THE LAST FEW MONTHS

Respondents have typically undertaken between two and three personal development activities in the last few months, with learning new way to use technology to keep in touch with colleagues, embracing mental/physical health activities and participating in online learning the most common

