



E R S
Research and Consultancy

The Economic Value of Library Services

FINAL REPORT

30 Queen Square Bristol BS1 4ND
T. 0117 927 3401 F. 0117 929 4189 E. bristol@ers.org.uk

W. www.ers.org.uk

Also in Newcastle

Commercial in Confidence

This report is confidential to the Client and ERS Ltd accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© ERS Ltd 2014



Date: 08 August 2012

Contents

EXECUTIVE SUMMARY	1
1. INTRODUCTION	3
Background	3
This Report	3
2. METHODOLOGY	4
Approach to Assessing Economic Value	4
Return on Investment Approach	4
Research Method.....	5
Survey of Library Users	5
Data Collection.....	5
Scotland Sample.....	6
Wales Sample.....	7
Northern Ireland Sample	9
3. RESULTS SCOTLAND	11
Use of Library Services	11
User Investment.....	13
Community Benefits	14
Summary Analysis 1: User Estimated Value per Visit	15
Cost of Alternatives.....	16
Summary Analysis 2: Annual Value per User	17
Indirect Economic Impact	18
4. RESULTS WALES	22
Use of Library Services	22
User Investment.....	23
Community Benefits	25
Summary Analysis 1: User Estimated Value per Visit	26
Cost of Alternatives.....	27
Summary Analysis 2: Annual Value per User	28
Indirect Economic Impact	28
5. RESULTS NORTHERN IRELAND	32
Use of Library Services	32
User Investment.....	34
Community Benefits	36

Summary Analysis 1: User Estimated Value per Visit	37
Cost of Alternatives.....	37
Summary Analysis 2: Annual Value per User	38
Indirect Economic Impact	39
6. SUMMARY OF USER VALUES	41
Use of Library Services	41
User Investment.....	41
Community Benefits.....	42
Summary Analysis 1: User Estimated Value per Visit	42
Cost of Alternatives.....	42
Summary Analysis 2: Annual Value per User	43
Indirect Economic Impacts.....	43
7. CONCLUSIONS COMPARING COST AND VALUE.....	45
Expenditure Per Visit.....	45
Expenditure Per User	45
APPENDIX 1 SURVEY	49
APPENDIX 2 ASSUMPTIONS USED WHEN CALCULATING ECONOMIC VALUE.....	53
APPENDIX 3 ANECDOTAL FEEDBACK FROM RESPONDENTS	54
Scotland	54
Northern Ireland	55
Wales.....	55

EXECUTIVE SUMMARY

- E.1. In May 2013 ERS Ltd was commissioned by ALMA UK to carry out primary research into the value of library services in Scotland, Wales and Northern Ireland. This research built on an earlier comprehensive literature review of methodologies to assess the value of museums, archives and libraries.
- E.2. The methodology employed considers the following five measures of value:
- i. **User Investment:** the cost to individuals of using the services;
 - ii. **Community Benefits:** the spending with local service providers e.g. shops and cafes;
 - iii. **Cost of Alternatives:** money saved by using the library;
 - iv. **Employment effects:** as a result of staff wages and their spending; and
 - v. **Supply Chain effects:** the value of library spending on goods and services.
- E.3. A survey of library users was conducted to assess measures i to iii and library data was used to assess iv and v.
- E.4. The library user survey was carried out during June and July in of 2013 and covered: 50 libraries in 11 local authorities in Scotland; 25 libraries in 8 local authorities in Wales; and 8 libraries in Northern Ireland. In total, 4009 surveys were completed and analysed across the 3 nations.
- E.5. The results show that the users of libraries place the following values on library services per visit: £24.10 in Scotland; £26.38 in Wales; and £27.27 in Northern Ireland. This theoretical monetary value is estimated via the amount users invest in using the services through their time and what they spend in the locality. When compared to the expenditure on library services, the user estimated value per visit of our survey respondents is over 6 times greater than the cost of provision in Northern Ireland, over 5.5 greater in Scotland and over 7.5 times greater in Wales.
- E.6. The operation of the library facilities also supports employment and supply chains locally. This results from the consumption spending of library employees (from their wages) and creating profits for the suppliers of good and services to the libraries. These effects 'multiply' through the economy as the suppliers pay staff wages who

then go on to spend in the locality. This research estimates that in 2012-13 the libraries supported 1,296 jobs in Scotland, 596 jobs in Wales and 327 in jobs in Northern Ireland *over and above* those directly employed by the service.

- E.7. This research also provides the tools for individual, or groups of libraries to assess the value of their services to their users. The Toolkit includes the surveys and value calculator as well as a guide to using the tools.

1. INTRODUCTION

Background

- 1.1. In September 2010, ERS was commissioned by ALMA-UK, the Archives, Libraries Museums Alliance, to analyse economic impact methodologies for archives, libraries and museums and to utilise these to inform the development of economic impact toolkits. The tools needed to balance simplicity of approach with robustness of outcome so that they could be successfully rolled out across the sector.
- 1.2. The report¹ identified the most suitable and appropriate approaches to measuring impact; multiplier analysis for museums and archives and return on investment or economic valuation methodologies for libraries. A toolkit for libraries was developed and piloted in 2012. This current piece of work, commissioned in May 2013, seeks to gather sufficient data from libraries in Scotland, Wales and Northern Ireland to put into practice the methodology to generate robust conclusions.

This Report

- 1.3. This report documents the findings from primary research conducted in summer 2013. The results for Scotland, Wales and Northern Ireland are presented in full and a cross-country comparison provided in the Summary Chapter.
- 1.4. Sitting alongside this report is a toolkit that can be used by libraries to assess their economic impact. The toolkit comprises:
 - **User Survey:** in English and Welsh;
 - **Libraries Value Calculator:** A spreadsheet to input data from the survey and calculate and value measures;
 - **Libraries Value Summary:** A spreadsheet to compile data from a number of libraries; and
 - **Toolkit Instructions:** guidance on how to use the spreadsheet tools.

¹ ERS (2010) *Economic Impact Toolkits for Archives, Libraries and Museums* Available at: http://almauk.files.wordpress.com/2010/09/alma-uk-economic-impacts-project-stage-1_final-report.pdf

2. METHODOLOGY

Approach to Assessing Economic Value

- 2.1. In 2010/11 ERS completed an extensive survey of methodologies for identifying the economic value of museums, archives and libraries. A key conclusion was that the methods that could be applied to museums and archives were different to those required for libraries. Museums in particular lend themselves to multiplier analysis due to their reliance on the visitor economy. The museums and archives tool was developed and is available at: http://almauk.org/working-together/our_activity/economic-impacts/
- 2.2. As libraries act as a local facility they lend themselves to the Return on Investment and Economic Valuation approaches, often applied to amenities such as green spaces. The toolkit for libraries sits alongside this report and will be made available on the ALMA UK website and the CyMAL website.

Return on Investment Approach

- 2.3. The return on investment approach has been most widely used amongst libraries in the United States² with the approach adopted informed by research undertaken initially in the United Kingdom³. It focuses on user-value but does not consider the more contentious non-user value. The extent to which value or user-investment is captured varies on a study by study basis but can include time invested and travel expenses (as these relate to an individual's "investment" for using the library).
- 2.4. The approach also utilises "multiplier analysis" in relation to expenditure associated with employment and procurement activities of the library. This illustrates the indirect and induced economic impacts of the library employing staff and purchasing good and services.
- 2.5. The technique in its entirety uses the following measures:

² See for instance - The Economic Impact of Public Libraries on South Carolina, Barron (2005) and Placing an Economic Value on the Services of Public Libraries in Suffolk County, New York (2005)

³ Economic Value of Public Libraries in the UK, Morris et al (2002)

-
- i. **User Investment:** the cost to individuals of using the services (in addition to tax paid for the operation of the library) for example time invested and expenditure such as travel expenditure;
 - ii. **Community Benefits:** the local spending by visitors e.g. in shops and cafes;
 - iii. **Cost of Alternatives:** the cost of sourcing alternatives if the service did not exist (i.e. money saved);
 - iv. **Economic Impacts of employment:** the direct, indirect and induced employment impacts as a result of staff wages and their spending; and
 - v. **Economic Impacts of supply chain:** the direct, indirect and induced value of spending on goods and services (non-salary).⁴

2.6. Each of these measures is addressed in turn in the Results sections of this report.

Research Method

Survey of Library Users

2.7. Questions in the **user survey** (Appendix 1) relate to measures i, ii and iii listed above. The survey was sent to Heads of Library Services in PDF format and was distributed by library staff in paper format over a 4 to 8 week period in June and July 2013. The surveys were returned to ERS by post. The responses were entered into the Libraries Value Calculator spreadsheet for each library service (tab 3. Survey Input).

Data Collection

2.8. The Heads of Library Services were asked to provide data in relation to measures iv and v listed above. In order to assess the impacts of spend and employment, each local authority was asked to provide information on staff numbers and expenditure on goods and services. The definition of expenditure on goods and services was aligned with the annual CIPFA return⁵ and includes all revenue expenditure except staff costs such as wages, national insurance, pensions etc. All local authorities returned the information and this was entered into the Libraries Value Calculator (tab 2. Indirect Impacts).

⁴ Adapted from: Economic Impact Methodologies For the museums, libraries and archives sector: what works and what doesn't, Jura Consultants (2009)

⁵ Cell 127 minus cell 101 of the 2012-13 CIPFA questionnaire

Scotland Sample

- 2.9. The sample of libraries within the research was selected via a two stage approach. First a sample of local authorities in Scotland was generated using a systematic random selection method⁶ and verified to ensure it would generate a representative response. Local authorities that were involved in the pilot study⁷ were replaced if they happened to be selected at random. In turn, a systematic random sample of libraries was selected from the local authorities included within the sample reflecting the number of libraries operating within those local authorities.
- 2.10. Of the 66 libraries in 11 local authorities selected to distribute surveys in Scotland, completed surveys were received from 50 libraries across all 11 local authorities.
- 2.11. The distribution of the surveys returned from across Scotland is shown in Table 1 and Figure 1.

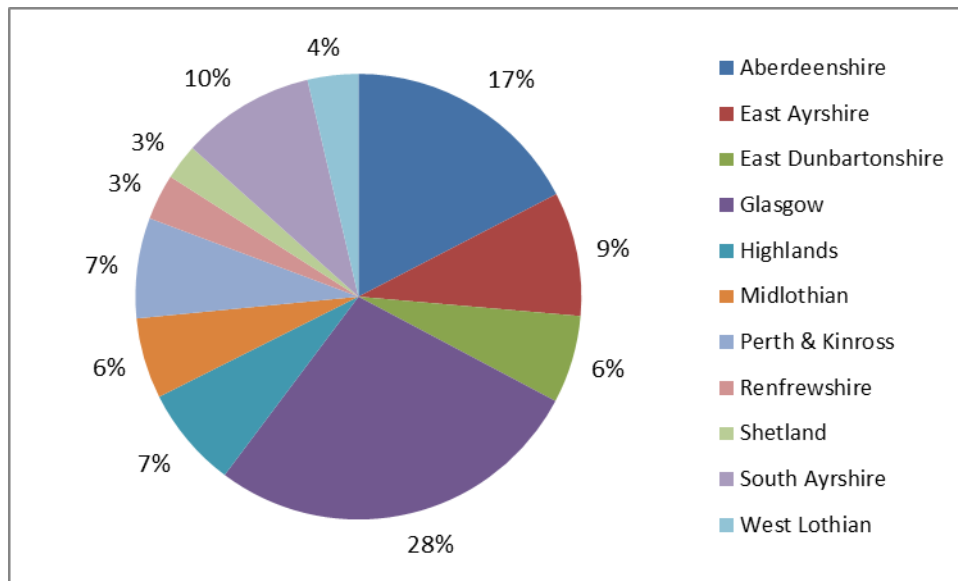
Table 1 Scotland Sample Achieved

Local Authority	Libraries	Total Respondents
Aberdeenshire	5	303
East Ayrshire	7	157
East Dunbartonshire	3	111
Glasgow	11	479
Highlands	5	128
Midlothian	3	102
Perth & Kinross	4	127
Renfrewshire	4	58
Shetland	1	45
South Ayrshire	4	169
West Lothian	3	64
TOTAL SAMPLE	50	1743

⁶ Items listed in alphabetical order then every “nth” entry selected

⁷ Local authorities participated in pilot: Argyll & Bute and Aberdeen

Figure 1 Scotland Sample Achieved



Wales Sample

2.12. The sample of local authorities from Wales was generated using a systematic random selection method⁸ and verified to ensure it would generate a representative response. Local authorities that were involved in the pilot study⁹ were replaced if they happened to be selected at random. In turn, a systematic random sample of libraries was selected from the local authorities included within the sample, reflecting the number of libraries operating within those local authorities.

2.13. Of the 35 libraries in 10 local authorities selected to distribute surveys in Wales, completed survey responses were received from 25 libraries across 8 local authorities.

2.14. The distribution of the surveys returned from across Wales is shown in Table 2 and Figure 2.

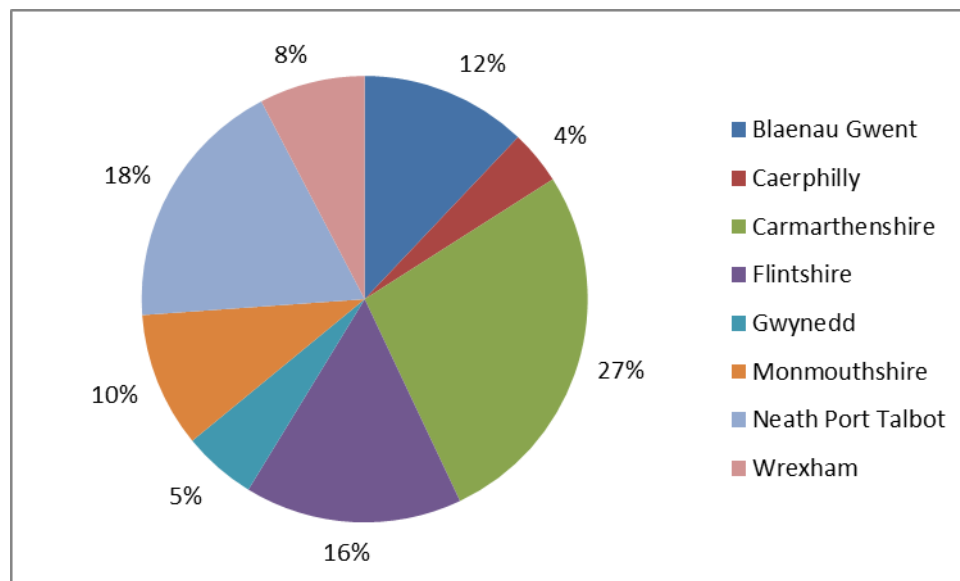
⁸ Items listed in alphabetical order then every “nth” entry selected

⁹ Local authorities participated in pilot: Merthyr Tydfil and Swansea

Table 2 Wales Sample Achieved

Local Authority	Libraries	Total Respondents
Blaenau Gwent	2	170
Caerphilly	1	55
Carmarthenshire	5	380
Flintshire	4	222
Gwynedd	4	75
Monmouthshire	2	138
Neath Port Talbot	4	260
Wrexham	3	108
TOTAL SAMPLE	25	1408

Figure 2 Wales Sample Achieved



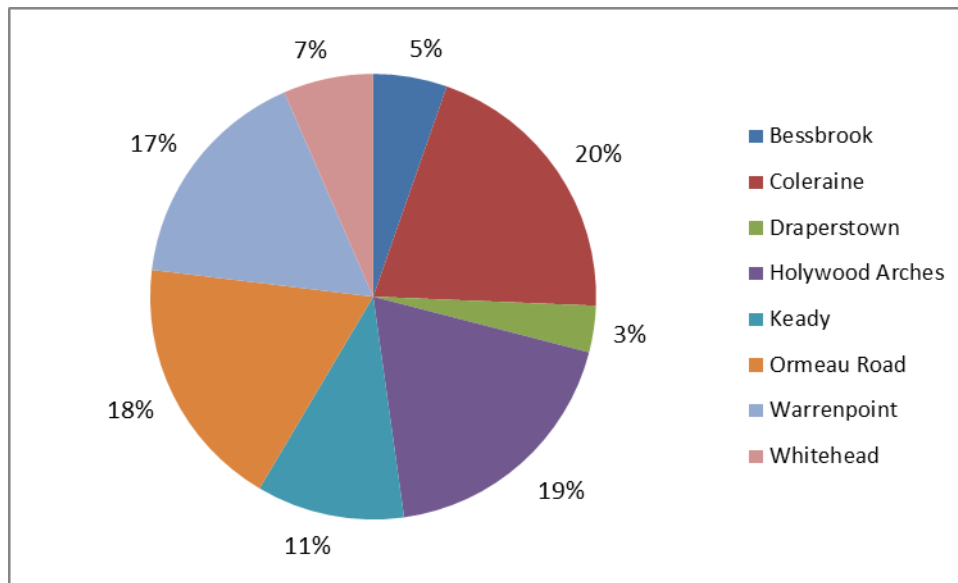
Northern Ireland Sample

- 2.15. As there is a single library service in Northern Ireland, the sample of Libraries for the Northern Ireland survey was generated using a proportionate stratified random selection method which was based on geographical area and opening hours. This was created in close collaboration with Libraries NI because other surveys were being rolled out around the same time and there was a need to guard against survey fatigue amongst library users.
- 2.16. Eight libraries were selected to distribute surveys in Northern Ireland, a total of 858 completed responses were received from across these 8 libraries.
- 2.17. The distribution of the surveys returned from across Northern Ireland is shown in Table 3 and Figure 3.

Table 3 Northern Ireland Sample Achieved

Library	Total Respondents
Bessbrook	46
Coleraine	174
Draperstown	29
Hollywood Arches	161
Keady	92
Ormeau Road	158
Warrenpoint	142
Whitehead	56
TOTAL SAMPLE	858

Figure 3 Northern Ireland Sample Achieved

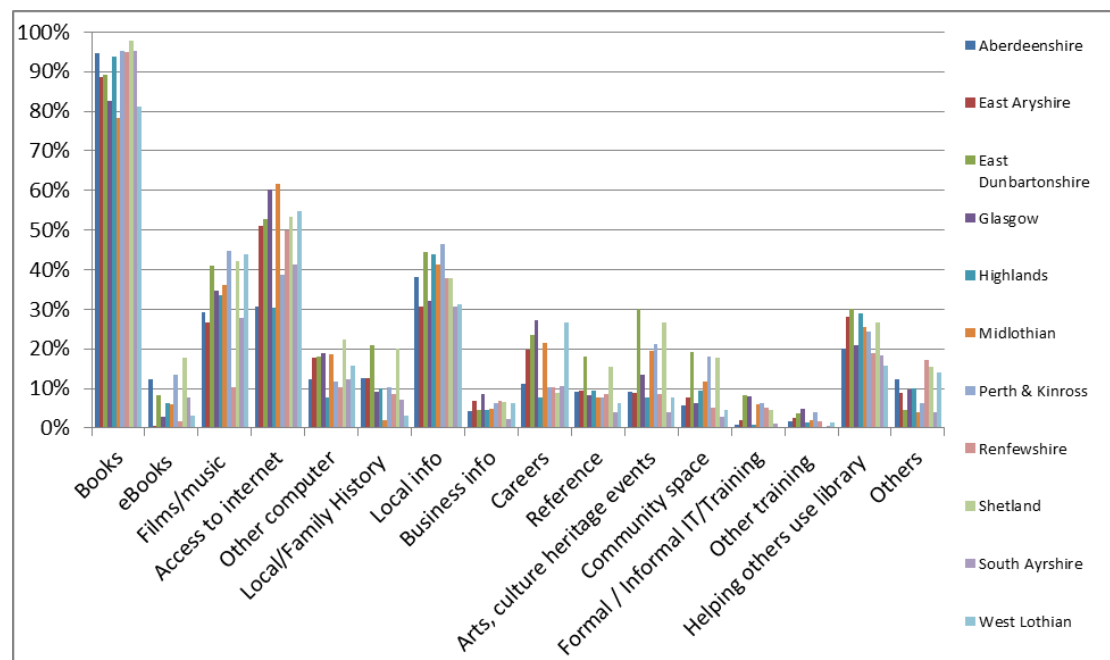


3. RESULTS SCOTLAND

Use of Library Services

- 3.1. When asked **why they are using the library** the prevailing response was for 'leisure' purposes (60%). The second highest response was 'brought a child' (17%), the close third and fourth responses were 'for work' (11%) and 'for education purposes' (9%).
- 3.2. The full range of **facilities and services** used by survey respondents is shown in Figure 4. Perhaps predictably, the most popular services were accessing books and the internet, followed by accessing local information and films and music.

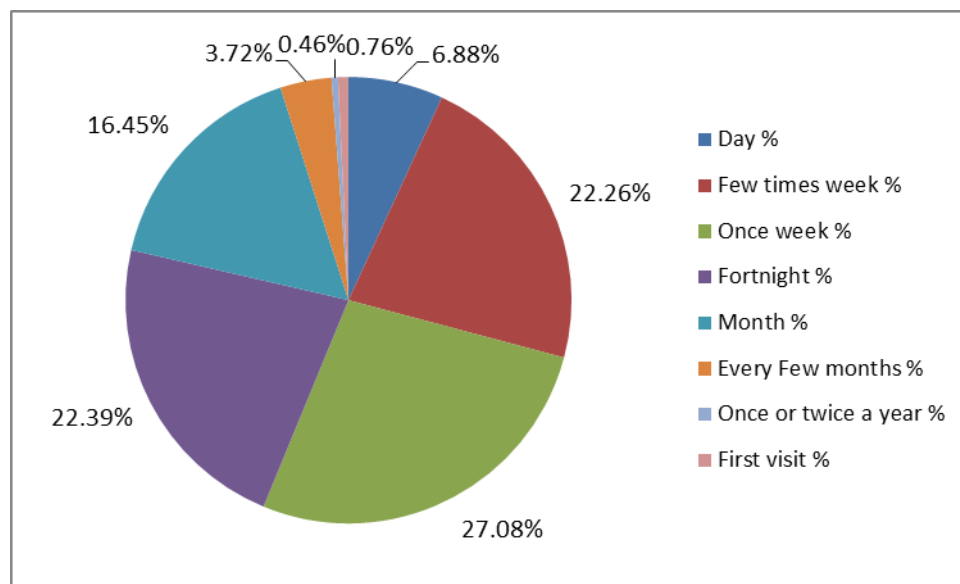
Figure 4 Facilities and Services Used by Survey Respondents



- 3.3. In terms of **frequency of visits**, the percentage breakdown of responses to the multiple choice question: "How often do you use a public library?" is shown in Figure 5. Just over half (56%) of those surveyed said they visit the library once a week or more, and over a quarter more than once a week (7% daily and 22% 'a few times a week'). When calculated as an average, this equates to 75 visits per person per year.

- 3.4. This can be compared to other available statistics including the Scottish Household Survey (SHS), which found that 20% of those who use the library at least once a year, visit at least once a week¹⁰. CIPFA data for Scotland estimates 5.4 visits to the library per year across the whole population, i.e. users *and* non users¹¹. Again using CIPFA data the total number of visits can be divided by the number of Active Borrowers, this gives an average of 28 visits per year¹², considerably lower than reported through the survey.
- 3.5. It is likely that respondents to the survey were highly engaged in the library services; therefore the frequency and average number of visits per year is likely to be higher than averages derived from other surveys. This will indirectly affect the 'per visit' values (as frequent users are likely to be positive about the facilities and services) and directly affect annual values through the calculations.

Figure 5 Frequency of Visits by Survey Respondents



¹⁰ Scottish Government (2013) Scotland's People Annual Report: results from 2012 Scottish Household Survey, page 143

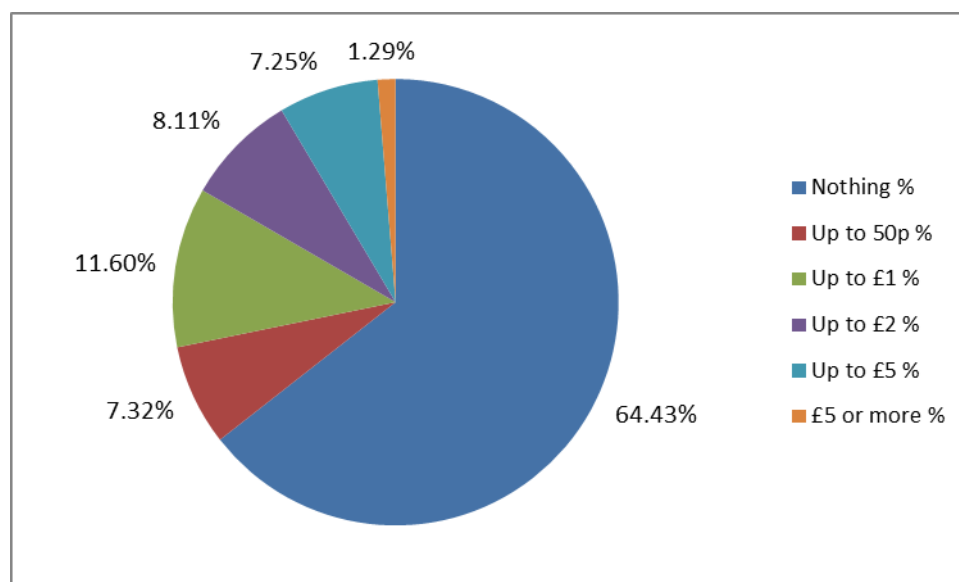
¹¹ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Visits for Library Purposes per 1000 population'

¹² Active Borrowers have borrowed an item within the last 12 months. The number of Active Borrowers will be lower than the number of users, therefore this calculated figure is an *over* estimate of number of visits per user per year.

User Investment

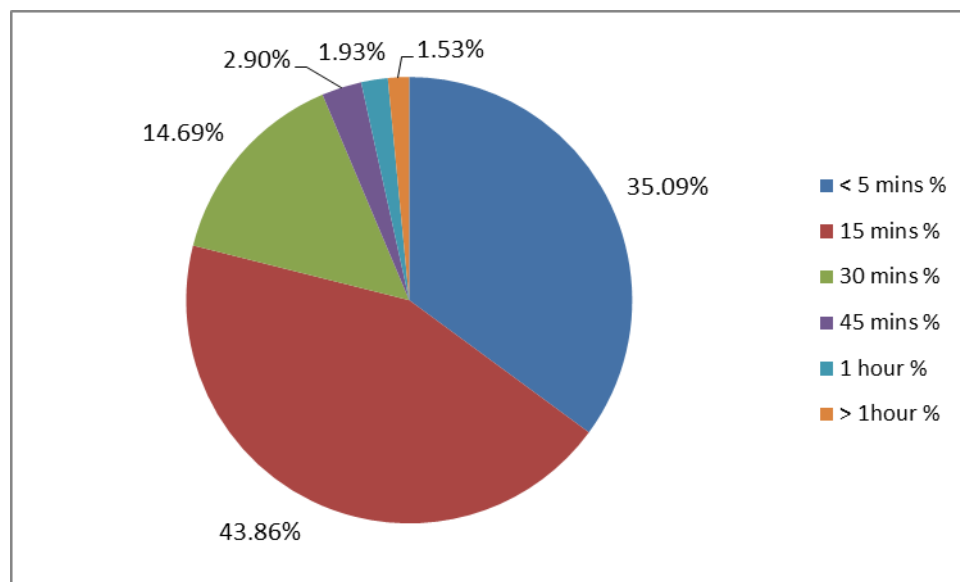
- 3.6. User investment analysis examines the costs to a library user in addition to payments via taxes for the operation of the library. These costs provide a proxy for how much the user values the services by considering time invested and incidental expenditure, such as travel expenses.
- 3.7. The responses to the three survey questions listed below are used to calculate the **user investment**:
- Approximately how long does it usually take you to get to the library?
 - Including all travel expenses (fuel, parking, bus fares etc.), how much does it usually cost you to get to the library?
 - For how long do you usually stay at the library?
- 3.8. More than half of users **travel to the library** on foot (55%), this is followed by car/motorcycle (35%). Much smaller proportions either use public transport (7%) or bicycle (3%). Whilst 65% spend nothing to travel to the library, the average cost is calculated to be 77 pence, Figure 6.

Figure 6 Costs to Travel to the Library



3.9. Figure 7 shows that 79% per cent of people spend either ‘less than 5 minutes’ (35%) or ‘15 minutes’ (44%) travelling to the library. This increases to 94% when ‘30 minutes’ (15%) is included. The average journey is calculated to be approximately 7.5 minutes.

Figure 7 Journey Time to the Library



3.10. When asked about the average amount of time spent in the library, more than half of users surveyed spend ‘half an hour or less’ in the library (52%). Eighty-three per cent of users spent an hour or less. The **average length of stay** is around 55 minutes.

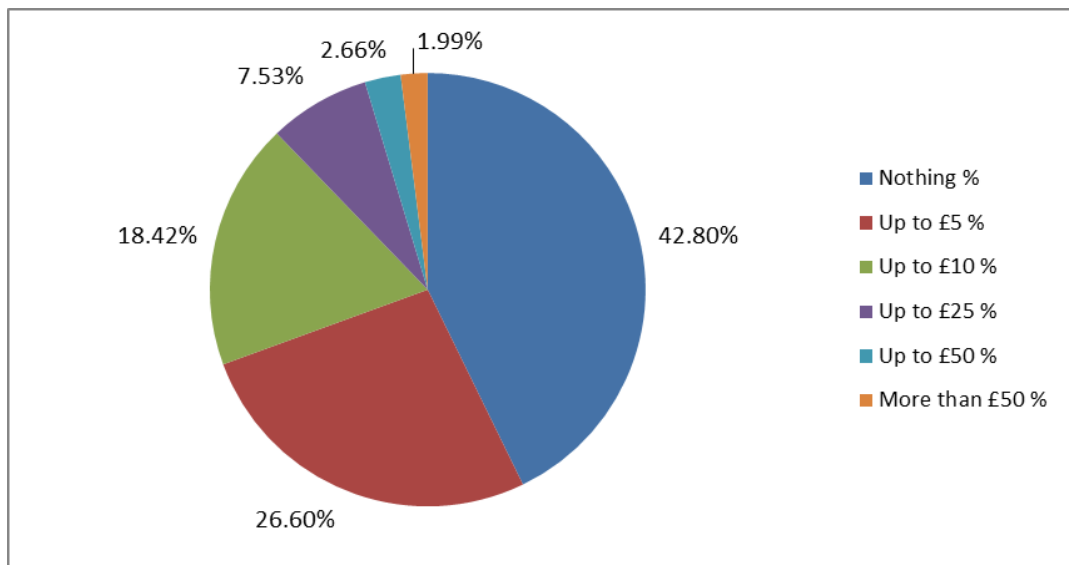
3.11. Time is translated into a monetary value using the average wage¹³ to represent the value of users’ time spent travelling to, and using the library.

Community Benefits

3.12. A key aspect of assessing the economic value of the libraries is the **spending in the library locality**. The survey asked “When visiting the library, on average, what would you spend in local shops/cafés etc.?”. The Scotland results show that 43% do not spend anything locally whilst visiting the library - which could be due to the locality itself – but 45% spend up to £10, see Figure 8. The average spend is calculated to be £7.78.

¹³ ONS (2013) Labour Market Statistics, July 2013 Release

Figure 8 Average Spend Locally when Visiting the Library



Summary Analysis 1: User Estimated Value per Visit

The **User Investment** and **Community Benefits** are combined to estimate the user value per visit. The assumptions associated with each of the multiple choice survey questions are detailed in Appendix 2. The calculated value per visit ranges from £18.43 and £35.32, with a Scotland average of £24.10. This User Estimated Value can be interpreted as the monetary equivalent of the value an individual places on the library services per visit.

Results per local authority are given in Table 4.

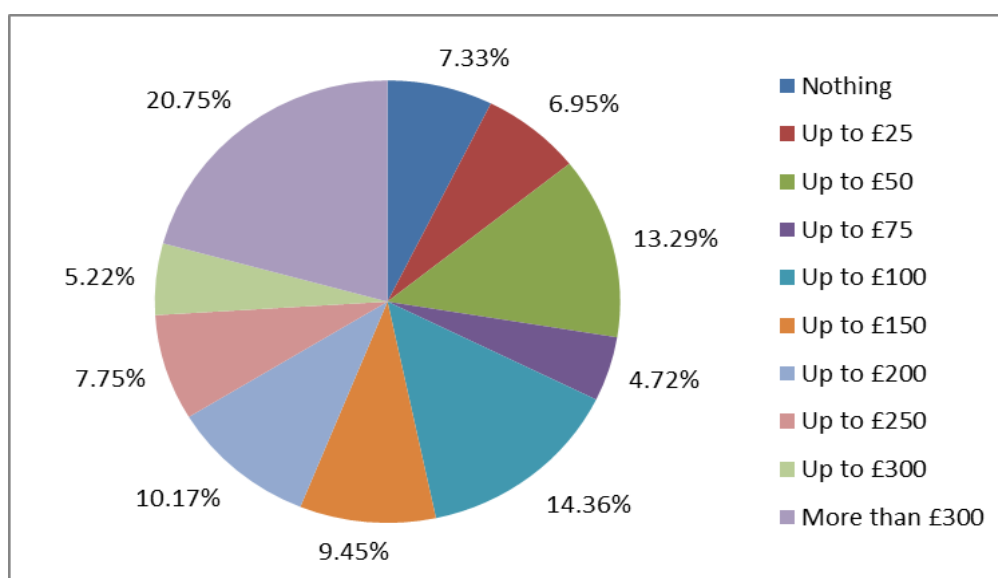
Table 4 User Estimated Value Scotland

Local Authority	User Estimated Value Per visit
Aberdeenshire	£23.60
East Ayrshire	£19.77
East Dunbartonshire	£27.16
Glasgow	£26.40
Highlands	£23.62
Midlothian	£24.28
Perth & Kinross	£21.27
Renfrewshire	£23.15
Shetland	£35.32
South Ayrshire	£18.43
West Lothian	£22.10
TOTAL SAMPLE	£24.10

Cost of Alternatives

3.13. The survey asked library users to quantify how much money they thought they **saved** in cash terms by using library services. “By using the library to access the above services [sic.], how much money do you estimate you save over the course of a year (not having to buy books, subscribe to the internet etc.)?”. The results show a wide range of responses; however the largest proportion of respondents said more than £300 (21%).

Figure 9 Estimated Annual Savings from Using Library Services



- 3.14. The average annual saving per user is calculated and given in Table 5, overleaf.
- 3.15. The highest Average Annual Saving is in Shetland at £225.58, highlighting the higher costs of alternative services in the area.

Table 5 Estimated Annual Savings from Using Library Services

Local Authority	Average Annual Savings
Aberdeenshire	£157.08
East Ayrshire	£216.94
East Dunbartonshire	£152.24
Glasgow	£142.71
Highlands	£189.24
Midlothian	£151.58
Perth & Kinross	£141.70
Renfrewshire	£145.21
Shetland	£225.58
South Ayrshire	£168.90
West Lothian	£132.35
TOTAL SAMPLE	£165.78

Summary Analysis 2: Annual Value per User

The **User Estimated Value**, **Community Benefits** and **Cost of Alternatives** can be combined to calculate an average Annual Value per User. See Table 6.

This calculated average utilises the average number of visits per year to derive the annual value per user. As noted earlier, the estimated average number of visits per year from our research is higher than seen in other research therefore this value is likely to be a high estimate.

Table 6 Average Annual Value per User

Local Authority	Average Annual Value per User
Aberdeenshire	£1,048
East Ayrshire	£1,559
East Dunbartonshire	£2,380
Glasgow	£3,041
Highlands	£1,645
Midlothian	£2,404
Perth & Kinross	£1,346
Renfrewshire	£1,575
Shetland	£2,388
South Ayrshire	£1,323
West Lothian	£2,160
TOTAL SAMPLE	£1,346

Indirect Economic Impact

Employment Effects

3.16. Alongside the direct value of the library service to users, the economic impact of the facility in the locality can be assessed. The local employment supported is calculated by combining the direct, indirect and induced employment.

- **Direct employment:** employment directly from the library facility;
- **Indirect Employment:** employment arising due to purchases made by library employees; and
- **Induced Employment:** arising due to expenditure from those who derive employment and thereby income from the direct and indirect employees of the libraries.

3.17. The Head of Service was asked to provide data on the number of staff employed within the libraries surveyed, as well as for their library service as a whole. The indirect and induced jobs were calculated using ratios derived from government guidance on measuring economic impact.

Table 7 Indirect and Induced Employment

Local Authority	Number of full time equivalent (FTE) employees	Indirect and Induced Jobs	Local Employment Supported
Aberdeen City	107.2	57.2	164.4
Aberdeenshire	58.5	31.2	89.6
Angus	44.4	23.7	68.0
Argyll & Bute	27.5	14.7	42.2
Clackmannanshire	10.9	5.8	16.7
Dumfries & Galloway	51.5	27.5	79.0
Dundee	104.1	55.5	159.6
East Ayrshire	52.8	28.2	81.0
East Dunbartonshire	51.8	27.6	79.4
East Lothian	44.9	23.9	68.8
East Renfrewshire	36.5	19.5	56.0
Edinburgh	252.2	134.5	386.7
Falkirk	70.8	37.8	108.6
Fife	190.8	101.7	292.5
Glasgow	223.6	119.2	342.8
Highlands	122.6	65.4	188.0
Inverclyde	30.4	16.2	46.6
Midlothian	27.3	14.6	41.9
Moray	47.3	25.2	72.5
North Ayrshire	62.5	33.3	95.8
North Lanarkshire	158.0	84.2	242.2
Orkney	17.0	9.1	26.1
Perth & Kinross	50.6	27.0	77.6
Renfrewshire	70.6	37.6	108.2
Scottish Borders	41.3	22.0	63.3
Shetland	24.3	13.0	37.3
South Ayrshire	57.3	30.6	87.9
South Lanarkshire	200.0	106.7	306.7
Stirling	45.5	24.3	69.8
West Dunbartonshire	73.1	39.0	112.1
West Lothian	59.0	31.5	90.5
Western Isles	15.4	8.2	23.6
TOTAL	2,430	1,296	3,725

-
- 3.18. Within Scotland the local employment supported by libraries, per local authority, ranges from 17 to 307. For Scotland as a whole it is estimated that the library service supports 3,725 full time equivalent jobs, which is 1,296 over and above those directly employed by the service.

Local Supply Chain Effects

- 3.19. The impact of local supply chains is also calculated via the expenditure of the library service excluding staff wages (as this is accounted for via employment impacts). Again the direct, indirect and induced are considered.

- **Direct Impact:** directly from the library facility spending on goods and services;
- **Indirect Impact:** arising due to purchases made as part of library supply chains; and
- **Induced Impact:** arising due to expenditure from those who derive incomes from the direct and supply linkages of the libraries.

- 3.20. When considered in comparison to total expenditure on Libraries in Scotland¹⁴ (i.e. not just on procurement of goods and services) for every £1 spent, 33 pence is generated within local supply chains through expenditure on local goods and services.

¹⁴ CIPFASStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Total Net Expenditure': £123,758,349

Table 8 Indirect and Induced Supply Chain Effects

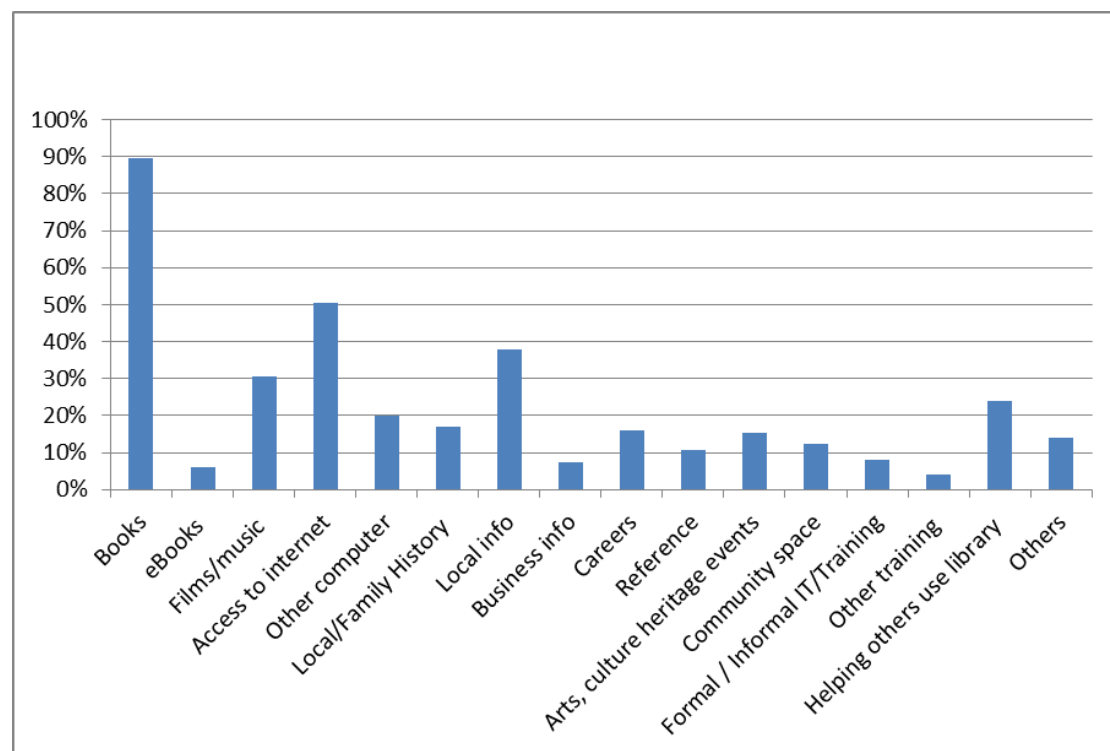
Local Authority	Annual Amount Spent on Goods and Services	Indirect and Induced Spend	Total Direct, Indirect and Induced Spend
Aberdeen City	£1,178,711	£358,033	£1,536,744
Aberdeenshire	£441,000	£133,954	£574,954
Angus	£955,670	£290,285	£1,245,955
Argyll & Bute	£744,301	£226,081	£970,382
Clackmannanshire	£578,196	£175,627	£753,823
Dumfries & Galloway	£1,216,858	£369,621	£1,586,479
Dundee	£671,825	£204,067	£875,892
East Ayrshire	£1,270,449	£385,899	£1,656,348
East Dunbartonshire	£469,993	£142,760	£612,753
East Lothian	£864,024	£262,447	£1,126,471
East Renfrewshire	£793,823	£241,124	£1,034,947
Edinburgh	£2,005,594	£609,199	£2,614,793
Falkirk	£835,499	£253,783	£1,089,282
Fife	£2,711,864	£823,729	£3,535,593
Glasgow	£1,494,188	£453,860	£1,948,048
Highlands	£1,139,613	£346,157	£1,485,770
Inverclyde	£470,590	£142,942	£613,532
Midlothian	£778,780	£236,554	£1,015,334
Moray	£1,060,531	£322,136	£1,382,667
North Ayrshire	£1,431,664	£434,868	£1,866,532
North Lanarkshire	£811,802	£246,585	£1,058,387
Orkney	£355,484	£107,978	£463,462
Perth & Kinross	£203,504	£61,814	£265,318
Renfrewshire	£1,176,470	£357,353	£1,533,823
Scottish Borders	£660,068	£200,496	£860,564
Shetland	£413,648	£125,646	£539,294
South Ayrshire	£714,211	£216,942	£931,153
South Lanarkshire	£1,788,673	£543,309	£2,331,982
Stirling	£1,174,549	£356,769	£1,531,318
West Dunbartonshire	£698,194	£212,076	£910,270
West Lothian	£1,712,160	£520,069	£2,232,229
Western Isles	£592,941	£180,106	£773,047
TOTAL	£31,414,877	£9,542,269	£40,957,146

4. RESULTS WALES

Use of Library Services

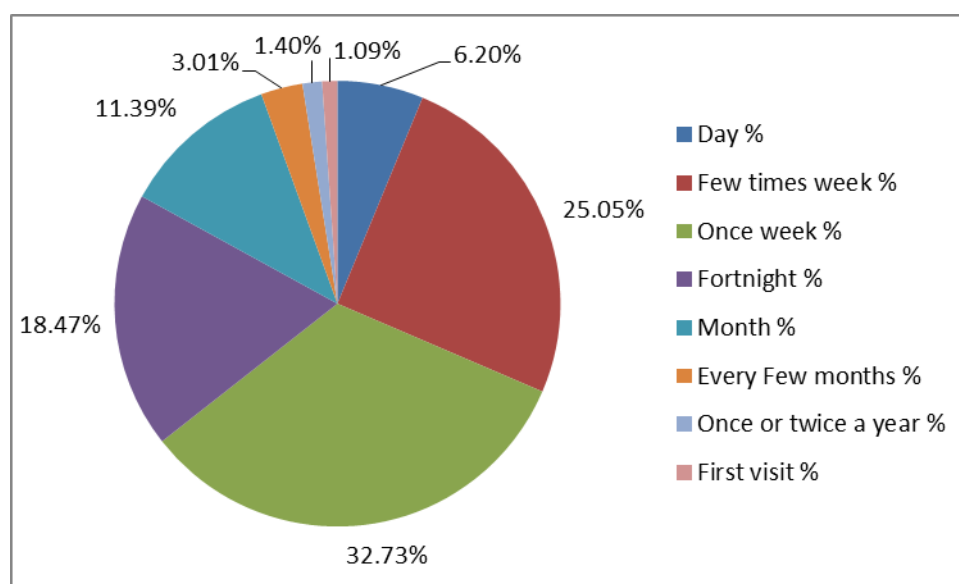
- 4.1. When asked **why they are using the library** today the prevailing response was for 'leisure' purposes (52%). The second and close third reasons were for 'education purposes' (19%) and 'brought a child' (15%).
- 4.2. The full range of **facilities and services** are used by survey respondents as shown in Figure 10. Perhaps predictably, the most popular services were accessing books, followed by accessing the internet and local information.

Figure 10 Facilities and Services Used by Survey Respondents



- 4.3. In terms of **frequency of visits**, the percentage breakdown of responses to the multiple choice question: "How often do you use a public library?" is shown in Figure 11. Nearly two thirds (64%) of those surveyed visit the library at least once a week or more, and another third (31%) more than once a week. When calculated as an average, this equates to 83 visits per person per year.

Figure 11 Frequency of Visits by Survey Respondents



- 4.4. This can be compared to other available statistics. CIPFA data for Wales estimates 4.8 visits to the library per year across the whole population, i.e. users *and* non users¹⁵. Again using CIPFA data the total number of visits can be divided by the number of Active Borrowers, this gives an average of 21 visits per year¹⁶, considerably lower than reported through the survey.
- 4.5. It is likely that respondents to the survey were highly engaged in the library services; therefore the frequency and average number of visits per year is likely to be higher than averages derived from other surveys. This will indirectly affect the 'per visit' values (as frequent users are likely to be positive about the facilities and services) and directly affect annual values through the calculations.

User Investment

- 4.6. User investment analysis examines the costs to a library user in addition to payments via taxes for operation of the library. These costs provide a proxy for how much the user values the services by considering time invested and incidental expenditure, such as travel expenses.

¹⁵ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Visits for Library Purposes per 1000 population'

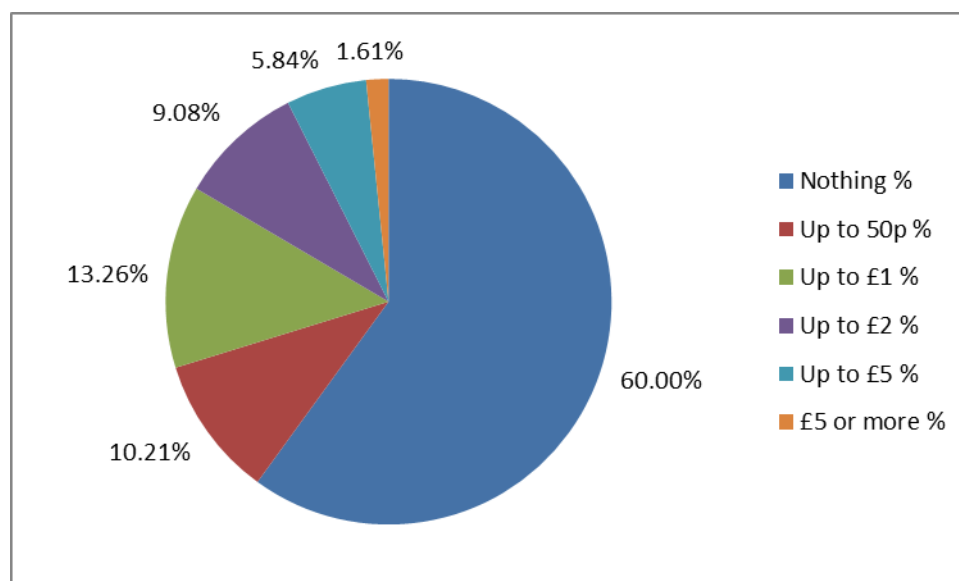
¹⁶ Active Borrowers have borrowed an item within the last 12 months. The number of Active Borrowers will be lower than the number of users, therefore this calculated figure is an *over* estimate of number of visits per user per year.

4.7. The responses to the three survey questions listed below are used to calculate the **user investment**:

- Approximately how long does it usually take you to get to the library?
- Including all travel expenses (fuel, parking, bus fares etc.), how much does it usually cost you to get to the library?
- For how long do you usually stay at the library?

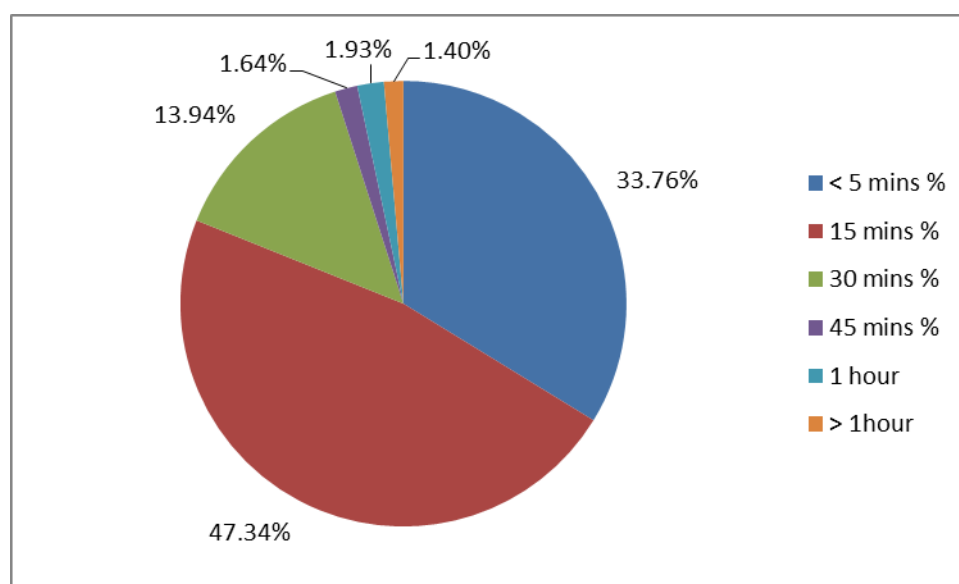
4.8. Half of users (51%) **travel to the library** on foot, this is followed by 'car/motorcycle' (41%). Much smaller proportions either use public transport (7%) or bicycle (2%). Whilst 60% spend nothing to travel to the library, 33% spend up to £2. The average journey cost is approximately 80 pence, see Figure 12.

Figure 12 Costs to Travel to the Library



4.9. Figure 13 shows that a third of people spend less than 5 minutes **travelling to the library**. 81% of people spend either '15 minutes' or less, increasing to 95% when '30 minutes' is included. The average journey is calculated to be approximately 12.5 minutes.

Figure 13 Journey Time to the Library



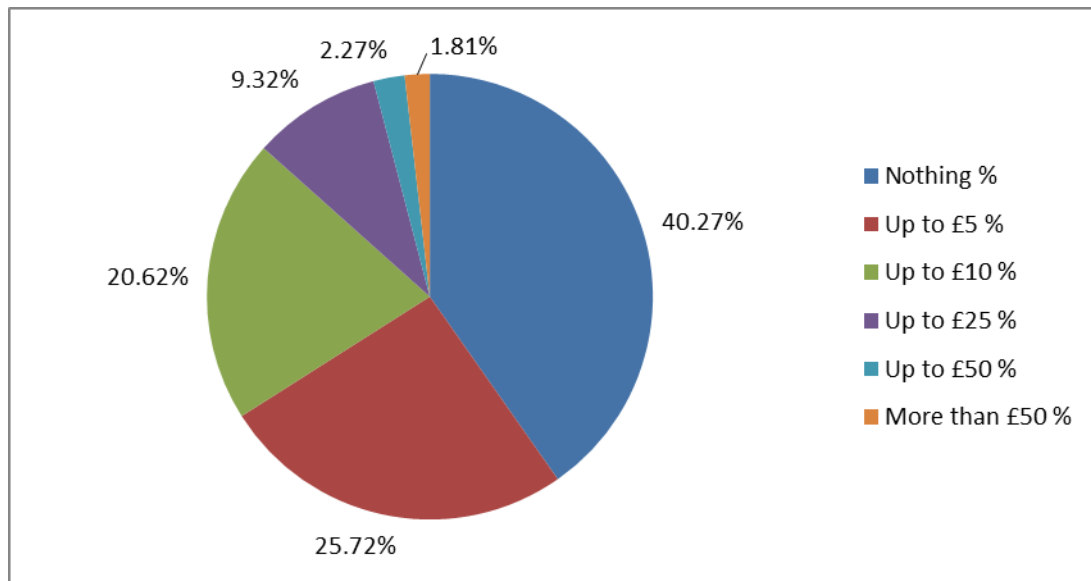
- 4.10. When asked about the average amount of **time spent in the library**, nearly two-thirds of users spend an hour or less per visit, and 14% spending at least 2 hours. The average length of stay is around an hour and five minutes.
- 4.11. Time is translated into a monetary value using the average wage¹⁷ to represent the value of the users time spent travelling to, and using the library.

Community Benefits

- 4.12. A key aspect of assessing the economic value of the libraries is the **spending in the library locality**. The survey asked “When visiting the library, on average, what would you spend in local shops/cafés etc.?”. The Wales results show that over 40% do not spend anything locally whilst visiting the library - which could be due to the locality itself – but 46% spend up to £10, Figure 14. The average spend is calculated to be £8.07.

¹⁷ ONS (2013) Labour Market Statistics, July 2013 Release

Figure 14 Average Spend Locally when Visiting the Library



Summary Analysis 1: User Estimated Value per Visit

The **User Investment** and **Community Benefits** are combined to estimate a user value per visit. The assumptions associated with each of the multiple choice survey questions are detailed in Appendix 2. The calculated value per visit ranges from £17.58 and £32.09, with a Wales average of £26.38. This User Estimated Value can be interpreted as the monetary equivalent of the value an individual places on the library services per visit.

The results of the local authorities within the sample are given in Table 9.

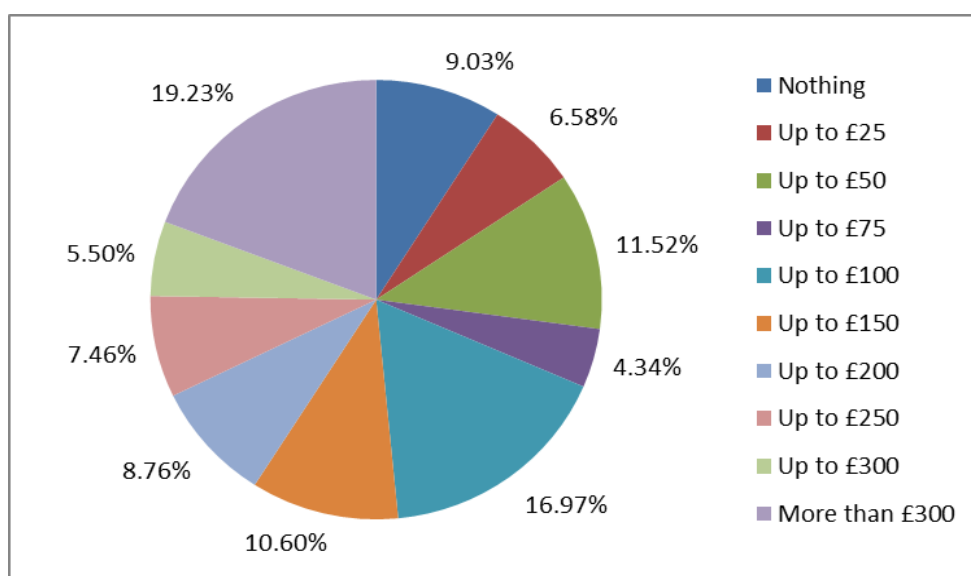
Table 9 User Estimated Value Wales

User Estimated Value per Visit	
Local Authority Results within Survey Sample	£17.58
	£22.36
	£23.08
	£26.04
	£28.18
	£29.95
	£31.79
	£32.09
TOTAL SAMPLE	£26.38

Cost of Alternatives

4.13. The survey asked library users to quantify how much money they thought they **saved** in cash terms via using the library services. “By using the library to access the above services [sic.], how much money do you estimate you save over the course of a year (not having to buy books, subscribe to the internet etc.)?”. The results show a wide range of responses; however the largest proportion of respondents said more than £300 (19%).

Figure 15 Estimated Annual Savings from Using Library Services



4.14. The average annual saving per user is calculated and given in Table 10.

Table 10 Average Annual Savings from Using Library Services

Local Authority	Average Annual Savings
Local Authority Results within Survey Sample	£93.50
	£117.03
	£158.80
	£163.75
	£166.80
	£187.31
	£194.30
	£199.64
TOTAL SAMPLE	£160.14

Summary Analysis 2: Annual Value per User

The **User Estimated Value**, **Community Benefits** and **Cost of Alternatives** can be combined to calculate an average Annual Value per user. This provides an estimate of the value of library services to individual users each year. See Table 11.

This calculated average utilises the average number of visits per year to derive the annual value per user. As noted earlier the estimated average number of visits per year from our research is higher than seen in other research, therefore this value is likely to be a high estimate.

Table 11 Average Annual Value per User

Local Authority	Average Annual Value per User
Local Authority Results within Survey Sample	£1,511
	£1,835
	£2,065
	£2,144
	£2,412
	£2,532
	£2,877
	£2,903
TOTAL SAMPLE	£2,065

Indirect Economic Impact

Employment Effects

4.15. Alongside the direct value of the library service to users, the economic impact of the facility in that locality has been assessed. The local employment supported is calculated by combining the direct, indirect and induced employment.

- **Direct employment:** employment directly from the library facility;
- **Indirect Employment:** employment arising due to purchases made by library employees; and
- **Induced Employment:** arising due to expenditure from those who derive employment and thereby income from the direct and indirect employees of the libraries.

4.16. The Head of Service was asked to provide data on the number of staff employed within the libraries surveyed, as well as for their library service as a whole. The indirect and induced jobs were calculated using ratios derived from government guidance on measuring economic impact.

Table 12 Indirect and Induced Employment

	Number of full time equivalent (FTE) employees	Indirect and Induced Jobs	Local Employment Supported
All Local Authorities	21.8	11.6	33.4
	22.0	11.7	33.8
	27.0	14.4	41.4
	30.2	16.1	46.3
	30.5	16.3	46.8
	31.0	16.5	47.5
	34.1	18.2	52.3
	34.5	18.4	52.9
	42.8	22.8	65.7
	43.1	23.0	66.0
	47.3	25.2	72.5
	48.0	25.6	73.6
	49.3	26.3	75.6
	51.8	27.6	79.4
	52.0	27.7	79.7
	52.9	28.2	81.1
	54.4	29.0	83.4
	64.3	34.3	98.6
	74.0	39.5	113.5
	81.0	43.2	124.2
89.6	47.8	137.4	
135.2	72.1	207.3	
TOTAL	1,116.8	595.5	1,712.4

4.17. Within Wales the local employment supported within the Local Authorities ranges from 33 to 207. For Wales as a whole it is estimated that the library service supports 1,712 full time equivalent jobs, which is 596 over and above those directly employed by the service.

Local Supply Chain Effects

4.18. The impact of local supply chains is also calculated via the expenditure of the library service excluding staff wages (as this is accounted for via employment impacts). Again the direct, indirect and induced are considered.

- **Direct Impact:** directly from the library facility spending on goods and services;
- **Indirect Impact:** arising due to purchases made as part of library supply chains; and
- **Induced Impact:** arising due to expenditure from those who derive incomes from the direct and supply linkages of the libraries.

4.19. When considered in comparison to total expenditure¹⁸ on libraries in Wales (i.e. not just on procurement of goods and services) for every £1 spent on providing the service, 57 pence is generated within local supply chains through expenditure on local goods and services.

¹⁸ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Total Net Expenditure': £51,631,862

Table 13 Indirect and Induced Supply Chain Effects

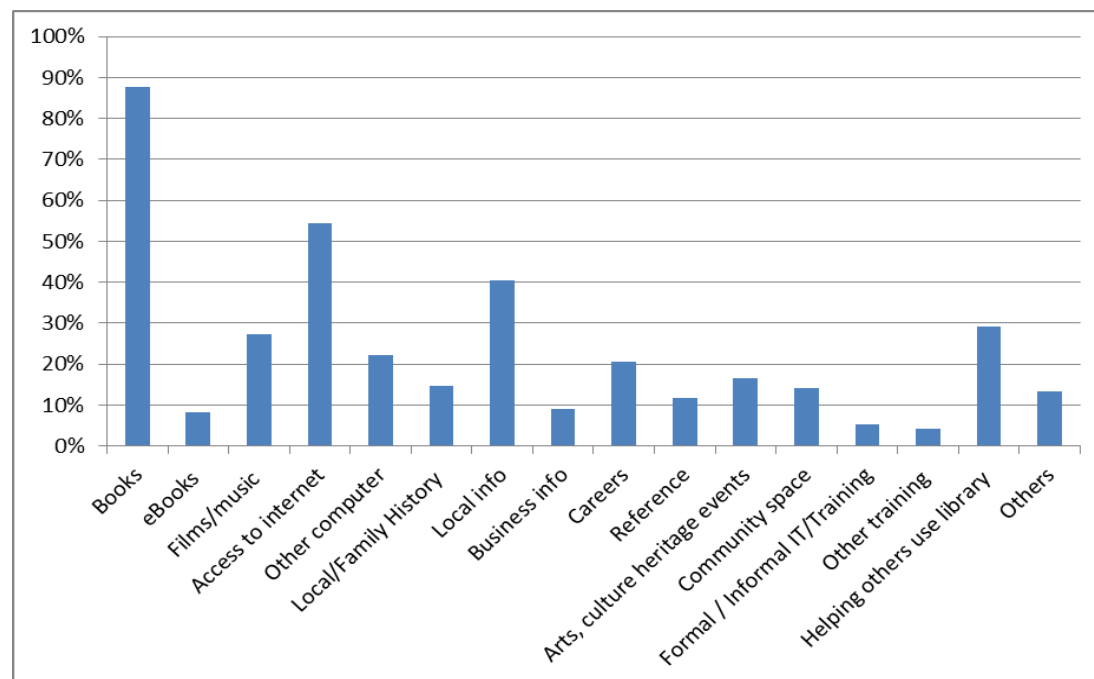
	Annual amount spent on goods and services	Indirect and Induced Spend	Total Direct, Indirect and Induced Spend
All Local Authorities	£336,236	£102,132	£438,368
	£369,540	£112,248	£481,788
	£403,520	£122,569	£526,090
	£407,410	£123,751	£531,161
	£488,714	£148,447	£637,161
	£494,000	£150,053	£644,053
	£504,686	£153,298	£657,984
	£530,821	£161,237	£692,058
	£629,342	£191,163	£820,505
	£654,506	£198,806	£853,312
	£723,620	£219,800	£943,420
	£889,076	£270,057	£1,159,133
	£947,101	£287,682	£1,234,783
	£1,019,286	£309,608	£1,328,894
	£1,209,210	£367,298	£1,576,508
	£1,297,901	£394,237	£1,692,138
	£1,403,572	£426,335	£1,829,907
	£1,419,241	£431,094	£1,850,335
	£1,649,599	£501,066	£2,150,665
	£1,795,224	£545,299	£2,340,523
£2,457,942	£746,600	£3,204,541	
£3,013,123	£915,236	£3,928,359	
TOTAL	£22,643,670	£6,878,015	£29,521,685

5. RESULTS NORTHERN IRELAND

Use of Library Services

- 5.1. When asked **why they are using the library** the prevailing response was for 'leisure' purposes (52%). The second highest response was 'brought a child' (25%) and third for 'education-related purposes' (12%).
- 5.2. The full range of **facilities and services** were used by the survey respondents. Perhaps predictably, the most popular services were books, the internet and local information, see Figure 16. This corroborates the results of the Continuous Household Survey (CHS) which found that the most frequently cited reason for visiting a public library was 'To borrow / return / renew books' at 72% of users¹⁹. This suggests a good representation of library users and the services they use within this survey sample.

Figure 16 Facilities and Services Used by Survey Respondents



¹⁹ Department of Culture Arts and Leisure (2013/14) Experience of Library Usage By Adults in Northern Ireland: Findings from the Continuous Household Survey (CHS) 2012/13, page 10. Available at: http://www.dcalni.gov.uk/index/quick-links/research_and_statistics-3/statistical_publication/libraries_publications/chs_adult_libraries_201213.htm

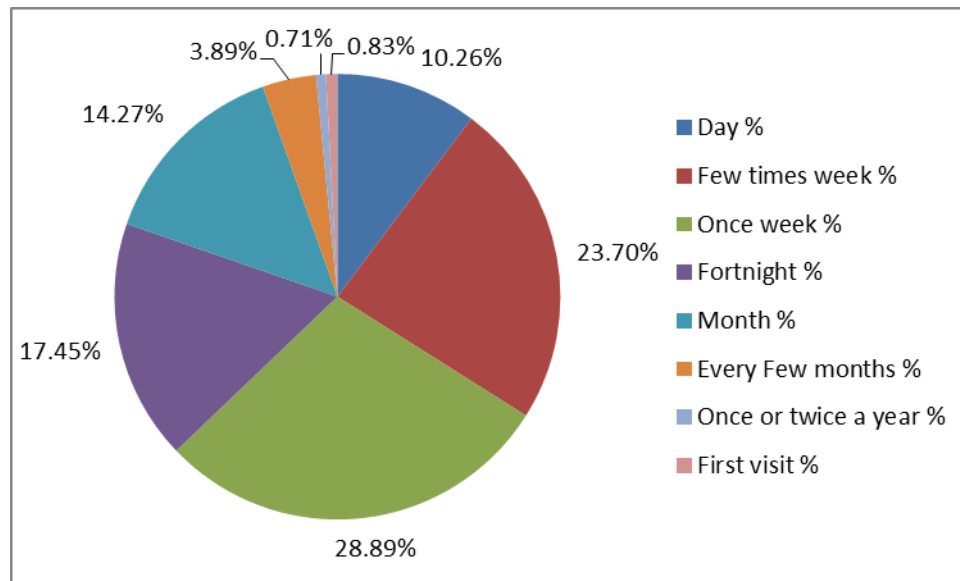
-
- 5.3. In terms of **frequency of visits**, the percentage breakdown of responses to the multiple choice question: “How often do you use a public library?” is shown in Figure 17. Sixty-three per cent of those surveyed said they visit the library at least once a week, 10% of respondents report they visit the library every day. When calculated as an average, this equates to 87 visits per person per year.
- 5.4. This can be compared to other available statistics including the 2011-12 CHS which found that 6% of the population visit the library at least once a week²⁰; this is equivalent to just over 20% of library users. CIPFA data for Northern Ireland estimates 4.1 visits to the library per year across the whole population, i.e. users *and* non users²¹. Again using CIPFA data the total number of visits can be divided by the number of Active Borrowers, this gives an average of 25 visits per year²², considerably lower than reported through the survey.
- 5.5. It is likely that respondents to the survey were highly engaged in the library services; therefore the frequency and average number of visits per year is likely to be higher than averages derived from other surveys. This will indirectly affect the ‘per visit’ values (as frequent users are likely to be positive about the facilities and services) and directly affect annual values through the calculations.

20 Department of Culture Arts and Leisure (2012/13) Experience of Library Usage By Adults in Northern Ireland: Findings from the Continuous Household Survey (CHS) 2011/12. Available at: http://www.dcalni.gov.uk/experience_of_libraries_chs_2011-12_bulletin.pdf

²¹ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals ‘Visits for Library Purposes per 1000 population’

²² Active Borrowers have borrowed an item within the last 12 months. The number of Active Borrowers will be lower than the number of users, therefore this calculated figure is an *over* estimate of number of visits per user per year.

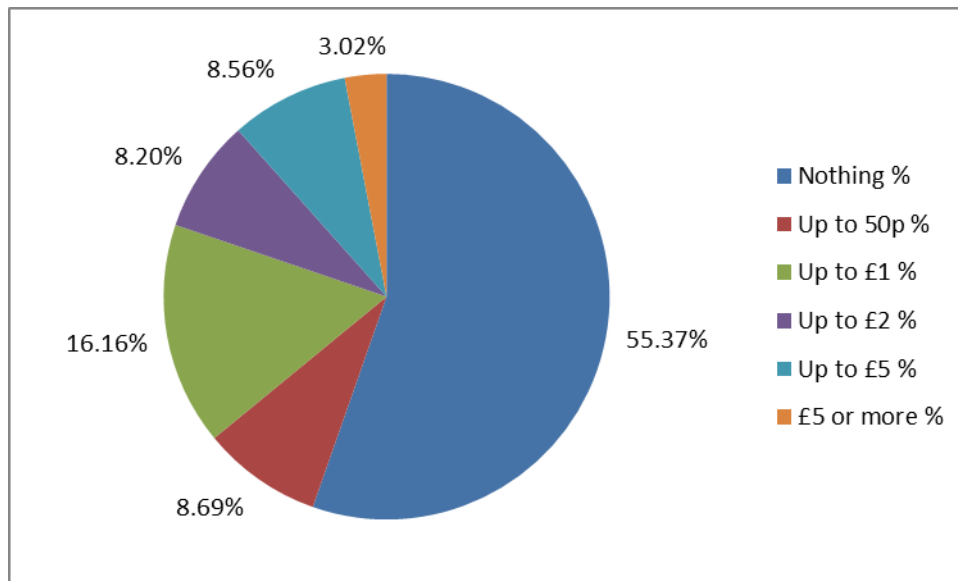
Figure 17 Frequency of Library Visits by Survey Respondents



User Investment

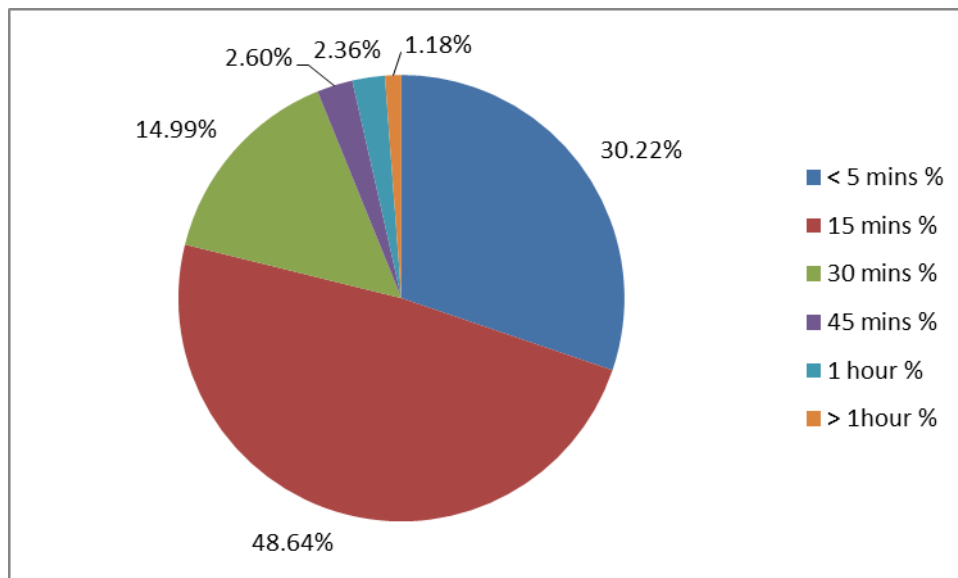
- 5.6. User investment analysis examines the costs to a library user in addition to payments via taxes for operation of the library. These costs provide a proxy for how much the user values the services by considering time invested and incidental expenditure, such as travel expenses.
- 5.7. The responses to the three survey questions listed below are used to calculate the **user investment**:
- Approximately how long does it usually take you to get to the library?
 - Including all travel expenses (fuel, parking, bus fares etc.), how much does it usually cost you to get to the library?
 - For how long do you usually stay at the library?
- 5.8. People usually **travel to the library** on foot (45%) or by car (45%); much smaller proportions use either public transport (6.5%) or bicycle (3.3%). Whilst 55% spend nothing to travel the library, the average cost is calculated to be £1.03, see Figure 18.

Figure 18 Costs to Travel to the Library



5.9. Figure 19 shows that 78% of people take either 'less than 5 minutes' or '15 minutes' **travelling to the library**. This increases to 93% when '30 minutes' is included. The average journey is calculated to be approximately 12 minutes.

Figure 19 Journey time to the Library



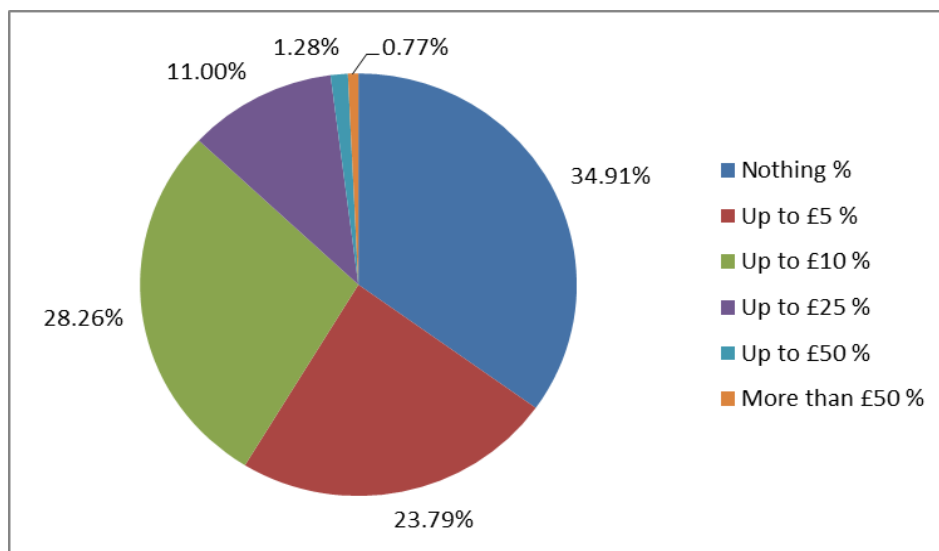
5.10. When asked about the average amount of **time spent in the library** the results are fairly evenly split between those who spend ‘half an hour or less’ (33%), ‘around and hour’ (38%) and over an hour and a half (29%)²³. The average length of stay is one hour and eight minutes.

5.11. Time is translated into a monetary value using the average wage²⁴ to represent the value of the users time spent travelling to, and using the library.

Community Benefits

5.12. A key aspect of assessing the economic value of the libraries is the **spending in the library locality**. The survey asked “When visiting the library, on average, what would you spend in local shops/cafés etc.?”. The Northern Ireland results show that over a third do not spend anything locally whilst visiting the library - which could be due to the locality itself – but around half spend up to £10, Figure 20. The average spend is calculated to be £7.94.

Figure 20 Average Spend Locally when Visiting the Library



²³ ‘About an hour and a half’ (12%) plus ‘At least 2 hours’ (17%)

²⁴ ONS (2013) Labour Market Statistics, July 2013 Release

Summary Analysis 1: User Estimated Value per Visit

The **User Investment** and **Community Benefits** are combined to estimate the user value per visit. The assumptions associated with each of the multiple choice survey questions are detailed in Appendix 2. The calculated value per visit ranges from £22.26 and £38.43, with a Northern Ireland average of £27.72. This User Estimated Value can be interpreted as the monetary equivalent of the value an individual places on the library services per visit.

The average across the types are given below, with no notable difference found between the rural and urban library types in terms of value per visit, see Table 14.

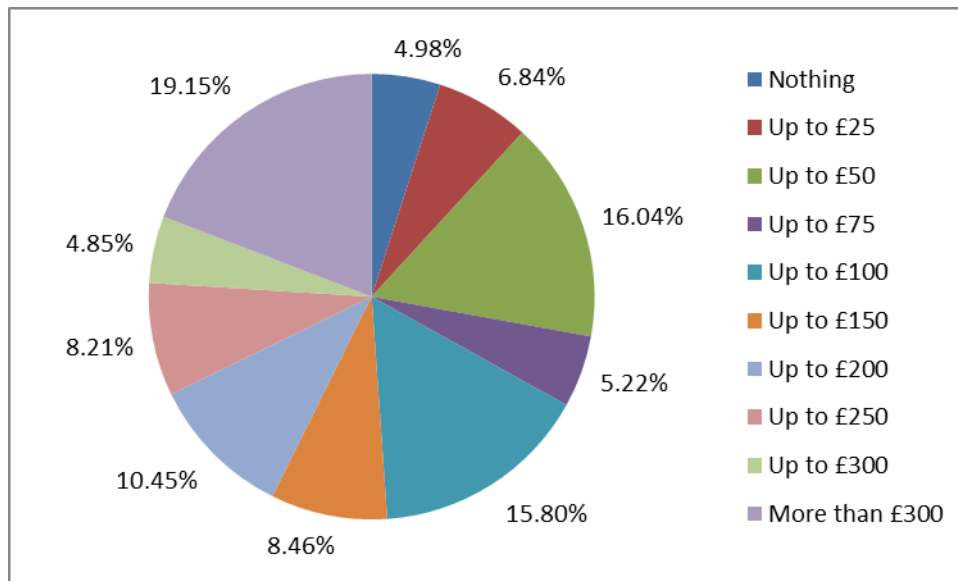
Table 14 User Estimated Value by Library Type

Type	Number of Libraries	User Estimated Value per Visit
Urban	3	£27.25
Town and fringe	1	£25.61
Rural Town and Village	4	£27.39
TOTAL SAMPLE	8	£27.72

Cost of Alternatives

5.13. The survey asked library users to quantify how much money they thought they **saved** in cash terms via using the library services: “By using the library to access the above services [sic.], how much money do you estimate you save over the course of a year (not having to buy books, subscribe to the internet etc.)?”. The results show a wide range of responses, see Figure 21, however the largest proportion of respondents said more than £300.

Figure 21 Estimated Annual Savings from Using Library Services



5.14. The average annual savings for each of the libraries within the sample is calculated and ranges from £71 per year to £250 per year. The average across Northern Ireland Libraries is £161.24.

Summary Analysis 2: Annual Value per User

The **User Estimated Value**, **Community Benefits** and **Cost of Alternatives** can be combined to calculate an annual value per user. This provides an estimate of the value of library services to individual users each year. The average across Northern Ireland is calculated to be £2,598 average annual value per user.

This calculated average utilises the average number of visits per year to derive the annual value per user. As noted earlier the estimated average number of visits per year from our research is higher than seen in other research therefore this value is likely to be a high estimate.

Indirect Economic Impact

Employment Effects

5.15. Alongside the direct value of the library service to users, the economic impact of the facility in the locality can be assessed. The local employment supported is calculated by combining the direct, indirect and induced employment.

- **Direct employment:** employment directly from the library facility;
- **Indirect Employment:** employment arising due to purchases made by library employees; and
- **Induced Employment:** arising due to expenditure from those who derive employment and thereby income from the direct and indirect employees of the libraries.

5.16. Libraries NI were asked to provide data on the number of staff employed within the library service across Northern Ireland. The indirect and induced jobs were calculated using ratios derived from government guidance on measuring economic impact.

Table 15 Indirect and Induced Employment

	Number of full time equivalent (FTE) employees	Indirect and Induced Jobs	Local Employment Supported
Northern Ireland	614.00	327.4	941.4

5.17. Within the sample of libraries who conducted the survey the local employment supported for an individual library ranges from 1 to 11. For Northern Ireland as a whole it is estimated that the library service supports 941 full time equivalent jobs, which is 327 over and above those directly employed by the service.

Local Supply Chain Effects

5.18. The impact of local supply chains is also calculated via the expenditure of the library service excluding staff wages (as this is accounted for via employment impacts). Again the direct, indirect and induced are considered.

- **Direct Impact:** directly from the library facility spending on goods and services;
- **Indirect Impact:** arising due to purchases made as part of library supply chains; and
- **Induced Impact:** arising due to expenditure from those who derive incomes from the direct and supply linkages of the libraries.

Table 16 Indirect and Induced Supply Chain Effects

	Annual amount spent on goods and services	Indirect and Induced Spend	Total Direct, Indirect and Induced Spend
Northern Ireland	£13,828,289	£4,200,343	£18,028,632

5.19. When considered in comparison to total expenditure²⁵ on libraries in Northern Ireland (i.e. not just on procurement of goods and services) for every £1 spent on delivering the service, 13 pence is generated within local supply chains through the expenditure on local goods and services.

²⁵ CIPFASStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Total Net Expenditure': £32,397,446

6. SUMMARY OF USER VALUES

6.1. This chapter provides summary data across the three nations participating in the research.

Use of Library Services

6.2. The principal reasons for visiting the library are consistent across Scotland, Wales and Northern Ireland. The average reported number of visits per year was highest in Northern Ireland, as shown in Table 17. All surveys found a higher frequency of visits than is reported in other research, suggesting those who completed the survey were highly engaged, and frequent users.

Table 17 Cross Country Comparison of Average Visits per Year

	Average Visits per Year
Northern Ireland	87
Scotland	75
Wales	83

User Investment

6.3. The investment users make in using the library services, using measures such as incidental costs and time taken to travel to the library (but excluding taxation), is lowest in Scotland across all measures. Users stay longest in Northern Ireland, and have marginally longer journeys to travel to libraries in Wales.

Table 18 Cross Country Comparison of User Investment per Visit

	Average Travel Time to Library	Average Travel Cost	Average Time Spent in the Library
Northern Ireland	12 mins	£1.03	1 hour 8 mins
Scotland	7.5 mins	77p	55 mins
Wales	12.5 mins	80p	1 hour 5 mins

Community Benefits

6.4. When visiting the library, whilst large proportions of people do not spend anything locally (43% Scotland, 40% Wales and 35% Northern Ireland) the average local spend, given in Table 19, across survey respondents is highest in Wales at £8.07.

Table 19 Cross Country Comparison of Local Spend per Visit

	Average Local Spend
Northern Ireland	£7.94
Scotland	£7.78
Wales	£8.07

Summary Analysis 1: User Estimated Value per Visit

The **User Investment** and **Community Benefits** are combined to estimate the User Estimated Value per visit. Northern Ireland has the highest value and Scotland the lowest. This represents a monetary equivalent of how much value users derive from the services each visit.

Table 20 Cross Country Comparison of User Value per Visit

	User Estimated Value per Visit
Northern Ireland	£27.72
Scotland	£24.10
Wales	£26.38

Cost of Alternatives

6.5. The Users in Scotland estimate the highest amount of cash savings per year from using library services. This relates to the amount of money they save from not buying books and subscribing to other library resources for example.

Table 21 Cross Country Comparison of Average Annual Savings

	Average Annual Savings
Northern Ireland	£161.24
Scotland	£165.78
Wales	£160.14

Summary Analysis 2: Annual Value per User

The **User Estimated Value**, **Community Benefits** and **Cost of Alternatives** can be combined to calculate an annual value per user. This provides an annual estimate of the value of services to individual users. The value is highest in Northern Ireland and lowest in Scotland, reflecting a frequency of visits by survey respondents.

Table 22 Cross Country Comparison of Average Annual Value per User

	Annual Value per User
Northern Ireland	£2,598
Scotland	£1,346
Wales	£2,065

Indirect Economic Impacts

Employment Effects

6.6. The direct, indirect and induced employment impacts seen in Scotland, Northern Ireland and Wales reflect the level of staffing across the library services. This data estimates that in 2012-13 libraries supported 1,296 jobs in Scotland, 596 jobs in Wales and 327 in jobs in Northern Ireland which were over and above those directly employed by library services. These jobs are supported via the consumption spending of staff and knock on effects this has on local businesses and jobs.

Table 23 Cross Country Comparison of Indirect and Induced Employment Effects

	Number of full time equivalent (FTE) employees	Indirect and Induced Jobs	Local Employment Supported
Northern Ireland	614	327	941
Scotland	2,430	1,296	3,725
Wales	1,117	596	1,712

Supply Chain Effects

6.7. The indirect and induced effects are summarised in Table 24 and reflect the level of procurement expenditure across countries. The effects are felt through the supply chain because the library suppliers have suppliers too and their staff and their suppliers' staff use their wages to consume goods and services and so on. Through local supply chains, the libraries create £9.5m of indirect and induced spending in Scotland, £6.8m in Wales and £4.2 million in Northern Ireland.

Table 24 Cross Country Comparison of Indirect and Induced Supply Chain Effects

	Annual amount spent on goods and services	Indirect and Induced Spend	Total Direct, Indirect and Induced Spend
Northern Ireland	£13,828,289	£4,200,343	£18,028,632
Scotland	£31,414,877	£9,542,269	£40,957,146
Wales	£22,643,670	£6,878,015	£29,521,685

7. CONCLUSIONS COMPARING COST AND VALUE

7.1. Whilst the user estimated values calculated in this research are theoretical values, putting them in context of expenditure on library services provides a useful comparison of cost versus social benefit.

Expenditure Per Visit

7.2. Using CIPFA data on the ‘number of visits for library purposes’ and ‘total net expenditure’ (2011-12) a unit cost per visit can be calculated. Recognising that cost of providing library services exhibits economics of scale and intra-country variations, the cost per visit ranges from £3.50 in Wales to £4.38 in Northern Ireland (Table 25).

Table 25 Cost per visit for Library Purposes

	Total Expenditure ²⁶	Total Number of Visits for Library Purposes ²⁷	Cost per Visit ²⁸
Northern Ireland	£32,397,446	7,403,452	£4.38
Scotland	£123,758,349	28,342,364	£4.37
Wales	£51,631,862	14,719,926	£3.50

7.3. The user estimated value per visit of respondents to the survey in this research is over 6 times greater than the cost per visit in Northern Ireland, over 5.5 greater in Scotland and over 7.5 times greater in Wales.

Expenditure Per User

7.4. To examine the relative costs and benefits per *library user*, the average annual savings of our survey respondents is compared to an estimate of expenditure per user. The number of library users is estimated in a slightly different way for each of the three nations:

²⁶ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals ‘Total Net Expenditure’ 2011-12 Actuals

²⁷ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals ‘Number of visits for library purposes’

²⁸ Total net expenditure ÷ Total number of visits for library purposes

- **Northern Ireland:** The findings from the Continuous Household Survey (CHS) suggest that 31% of the adult (over 16 years) population in Northern Ireland use libraries at least once a year²⁹. Using population estimates from Northern Ireland Statistics and Research Agency (NISRA)³⁰ of over 16 year olds, and an assumed level of usage of 31% from the CHS, the total number of library users over 16 years old is estimated to be: 446,863.
- **Scotland:** The findings from the Scottish Household Survey (SHS) suggest that 30% of the adult (over 16 years old) population in Scotland use libraries at least once a year³¹. Using population estimates from the General Register Office for Scotland³² of over 16 year olds, and an assumed percentage of users of 30% from the SHS the total number of library users over 16 years old is estimated to be: 1,319,679.
- **Wales:** Findings from a Carnegie UK Trust report in 2012 suggest that 45% of adults (over 16 years old) in Wales have “used or contacted a public library service in the last 12 months”³³. Using population estimates from the Office of National Statistics³⁴ and an assumed percentage of users of 45% from the Carnegie Trust report the total number of library users over 16 years old is estimated to be: 1,132,830.

7.5. A calculated cost of library services per user is presented in Table 26 overleaf. Importantly this does not include library users under the age of 16. This is due to the scope of the Household Surveys and Carnegie UK Trust report. The true number of library users including children will be higher than that reported here.

²⁹ Department of Culture Arts and Leisure (2013/14) Experience of Library Usage By Adults in Northern Ireland: Findings from the Continuous Household Survey (CHS) 2012/13

³⁰ NISRA (2013) Resident Population Estimates Mid-2012 Available at: <http://www.nisra.gov.uk/demography/default.asp17.htm>

³¹ Scottish Government (2013) Scotland’s People Annual Report: Results from 2012 Scottish Household Survey, page 136

³² General Register Office for Scotland (2013) Mid-2012 Population Estimates Scotland Available at: <http://www.gro-scotland.gov.uk/statistics/theme/population/estimates/mid-year/2012/index.html>

³³ Macdonald (2012) A New Chapter Public library services in the 21st Century, page 25. Available at: <http://www.carnegieuktrust.org.uk/CMSPages/GetFile.aspx?guid=b04629b2-aa09-4bd0-bc3a-9b9b04b7aba1>

³⁴ ONS (2013) Mid Year Population Estimates 2012 Available at: <http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-319259>

Table 26 Cost per User (using estimate of number of library users)

	Total Expenditure³⁵	Adult Population (over 16)	Calculated Estimate of Library Users	Cost per Users
Northern Ireland	£32,397,446	1,441,493	(31%) 446,863	£72.50
Scotland	£123,758,349	4,398,929	(30%) 1,319,679	£93.77
Wales	£51,631,862	2,517,400	(45%) 1,132,830	£45.58

7.6. The large difference between Wales compared to Scotland and Northern Ireland can be attributed to the higher than expected level of library usage reported in the Carnegie UK Trust report.

7.7. Due to the uncertainty of estimating the number of library user numbers with survey and population data, these figures can be verified using CIPFA statistics on the number of Active Borrowers. As Active Borrowers are those who have borrowed an item within the last 12 months not all library users will be counted; we therefore expect the number of people to be lower.

7.8. The numbers of Active Borrowers and the calculated cost per Active Borrower is given in Table 27 overleaf. The difference between the calculated number of library users using Household Survey/Carnegie UK Trust data and the number of Active Borrowers is largest for Wales where Active Users is 38% less. In Scotland and Northern Ireland they are 23% and 32% less respectively.

³⁵ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals 'Total Net Expenditure' 2011-12 Actuals

Table 27 Cost per Active Borrower

	Total Expenditure	Active Borrowers ³⁶	Cost per Active Borrower ³⁷
Northern Ireland	£32,397,446	302,358	£107.15
Scotland	£123,758,349	1,012,161	£122.27
Wales	£51,631,862	706,464	£73.08

7.9. The cost per Active Borrower methodology (Table 27) generates a higher ‘cost per’ figure than that derived from the survey methodology (Table 26) in all cases. This is likely to be driven by the fact that Active Borrower figures do not count all those who use library services, only those who borrow items. This underestimation will have pushed up the calculated figures in Table 27. Furthermore, and as we have seen in our own survey, users appear to overestimate the frequency of their library visits. This optimism may have pushed downwards the calculated values in Table 26.

7.10. Whilst there is uncertainty with both ‘cost per’ estimates, the estimated annual *savings* of our survey respondents is above both the ‘cost per active borrower’ and ‘cost per user’ (estimated via percentage of population) in all cases. See Table 28.

Table 28 Comparing Average Annual Savings to Cost per User

	Cost per User (population % estimates)	Cost per Active Borrower	Average Annual Savings of Survey Respondents
Northern Ireland	£72.50	£107.15	£161.24
Scotland	£93.77	£122.27	£165.78
Wales	£45.58	£73.08	£160.14

³⁶ CIPFAStats (2012) Public Library Statistics 2012-13 Estimates and 2011-12 Actuals ‘Number of Active Borrowers’

³⁷ Total net expenditure ÷ Active Borrowers

APPENDIX 1 SURVEY

CAPTURING THE VALUE OF LIBRARY SERVICES

There is no doubt that libraries are valued by those who use them and work in them. For the first time, we are seeking to establish just how valuable library services are to local people and local economies across the UK. **Pleased be assured that this survey DOES NOT seek information to introduce any charges for public library use – quite the opposite. Your responses will help us to promote the cause of public libraries in the future and so are much appreciated.**

All responses are anonymous and your answers will be combined with all others received. The questionnaire should only take 5-10 minutes to complete and we very much appreciate you taking the trouble to do so.

Library Staff

1. What is the name of the library where you work? _____

Please stamp all copies of the surveys completed by library users with library stamps

2. What is the postcode of the library? _____ / _____

3. Would you describe the library as (please choose the most appropriate fit):

- Urban** - based within a major town/city(at least 10,000 population), predominantly serving local people
- Town and fringe** - based within a small town (less than 10,000 population), serving local people and those living in surrounding areas
- Village** - based within a village (rural but not remote), serving local people and those living in surrounding settlements
- Remote** - rural and remote (e.g. Highlands and Islands of Scotland)
- Mobile Service**
- Unsure**

Library Users

Overview

1. Which library are you using today? _____

2. Why are you using the library today (**tick all that apply**)?

- | | |
|---|--|
| <input type="checkbox"/> Brought a child to use library | <input type="checkbox"/> For personal leisure |
| <input type="checkbox"/> For education-related purposes | <input type="checkbox"/> Work-related purposes |

Other (please specify)

3. How often do you use a public library?

- | | |
|---|--|
| <input type="checkbox"/> Every day | <input type="checkbox"/> Few times a week |
| <input type="checkbox"/> Once a week | <input type="checkbox"/> Once a fortnight |
| <input type="checkbox"/> Once a month | <input type="checkbox"/> Once every few months |
| <input type="checkbox"/> Once or twice a year | <input type="checkbox"/> First visit |

Getting to the library

4. Approximately how long does it **usually** take you to get to the library?

- | | |
|--|--|
| <input type="checkbox"/> Less than 5 minutes | <input type="checkbox"/> Nearer 15 minutes |
| <input type="checkbox"/> Nearer 30 minutes | <input type="checkbox"/> Nearer 45 minutes |
| <input type="checkbox"/> Nearer an hour | <input type="checkbox"/> More than an hour |

5. What is usually your **main** means of getting to the library?

- | | |
|----------------------------------|--|
| <input type="checkbox"/> Walk | <input type="checkbox"/> Car / Motorcycle |
| <input type="checkbox"/> Bicycle | <input type="checkbox"/> Public Transport (taxi, train, bus etc) |

6. **Including all travel expenses** (fuel, parking, bus fares etc.), how much does it **usually** cost you to get to the library?

- | | |
|-----------------------------------|-------------------------------------|
| <input type="checkbox"/> Nothing | <input type="checkbox"/> Up to 50p |
| <input type="checkbox"/> Up to £1 | <input type="checkbox"/> Up to £2 |
| <input type="checkbox"/> Up to £5 | <input type="checkbox"/> £5 or more |

7. For how long do you **usually** stay at the library? _____

- Half an hour or less
 About an hour
 About an hour and a half
 At least 2 hours

Expenditure

8. When visiting the library, **on average**, what would you spend in local shops/cafés etc.?

- Nothing
 Up to £5
 Up to £10
 Up to £25
 Up to £50
 More than £50

Nature of Library Usage

9. **Over the past year**, which of the following services have you used at the library (please tick all that apply):

Borrowing Books	<input type="checkbox"/>
Borrowing eBooks	<input type="checkbox"/>
Borrowing films/music	<input type="checkbox"/>
Access to internet	<input type="checkbox"/>
Other computer use apart from internet	<input type="checkbox"/>
Local/family history	<input type="checkbox"/>
Local information	<input type="checkbox"/>
Business information	<input type="checkbox"/>
Careers/jobs information	<input type="checkbox"/>
Reference services (including online subscription)	<input type="checkbox"/>
Attending arts, culture and heritage events	<input type="checkbox"/>
Using community space	<input type="checkbox"/>
Formal/informal IT training	<input type="checkbox"/>
Other formal/informal training	<input type="checkbox"/>
Helping family/someone else to use the library	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>

Alternatives

10. If the library no longer existed, how else would you have accessed services that you use?

Library Service	Buy new books	Buy second hand books	Borrow from friend/relative	Wouldn't bother
Obtaining Books				
Obtaining eBooks				
Obtaining films/music				

Library Service	Buy computer/internet service	Use community centre etc.	Use a friend's/relative's	Wouldn't bother
Access to internet				
Other computer use				

Library Service	Go to other known source	Try to find another source	Wouldn't bother
Local/family history			
Local information			
Business information			
Careers/jobs information			
Reference services/online subscriptions			
Formal/informal IT training			
Other formal/informal training			

Library Service	Go to other known venue	Try to find another venue	Wouldn't bother
Arts, culture and heritage events			
Community space			

11. By using the library to access the above services, how much money do you estimate you save over the course of a year (not having to buy books, subscribe to the internet etc.)?

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> Nothing | <input type="checkbox"/> Up to £25 |
| <input type="checkbox"/> Up to £50 | <input type="checkbox"/> Up to £75 |
| <input type="checkbox"/> Up to £100 | <input type="checkbox"/> Up to £150 |
| <input type="checkbox"/> Up to £200 | <input type="checkbox"/> Up to £250 |
| <input type="checkbox"/> Up to £300 | <input type="checkbox"/> More than £300 |

Thank you very much for your time in answering this questionnaire.

APPENDIX 2 ASSUMPTIONS USED WHEN CALCULATING ECONOMIC VALUE

Question	Assumption in the Model
<p>How often do you use a public library?</p> <p><i>*The published economic impact calculator uses different phrases for the first two options, specifically: 'Five or more times a week' and 'Two to four times week'</i></p>	<p>Every day = 300 visits per year*</p> <p>Few times a week = 150 visits per year*</p> <p>Once a week = 50 visits per year</p> <p>Once a fortnight = 25 visits per year</p> <p>Once a month = 12 visits per year</p> <p>Once every few months = 4 visits per year</p> <p>Once or twice a year = 1.5 visits per year</p> <p>First visit = 1 visit per year</p>
<p>Approximately how long does it usually take you to get to the library?</p>	<p>Less than 5 minutes = 2.5 minutes</p> <p>Nearer 15 minutes = 15 minutes</p> <p>Nearer 30 minutes = 30 minutes</p> <p>Nearer 45 minutes = 45 minutes</p> <p>Nearer an hour = 1 hour</p> <p>More than an hour = 1 hour and a quarter</p>
<p>Including all travel expenses (fuel, parking, bus fares etc.), how much does it usually cost you to get to the library?</p>	<p>Nothing = 0</p> <p>Up to 50p = 25p</p> <p>Up to £1 = 75p</p> <p>Up to £2 = £1.50</p> <p>Up to £5 = £3.50</p> <p>£5 or more = £6.50</p>
<p>How long do you usually stay at the library?</p>	<p>Half an hour or less = 15 minutes</p> <p>About an hour = 1 hour</p> <p>About an hour and a half = 1.5 hours</p> <p>At least 2 hours = 2.5 hours</p>
<p>When visiting the library, on average, what would you spend in local shops/cafés etc.?</p>	<p>Nothing = 0</p> <p>Up to £5 = £2.50</p> <p>Up to £10 = £7.50</p> <p>Up to £25 = £17.50</p> <p>Up to £50 = £37.50</p> <p>More than £50 = 62.50</p>
<p>By using the library to access the above services, how much money do you estimate you save over the course of a year (not having to buy books, subscribe to the internet etc.)?</p>	<p>Nothing = 0</p> <p>Up to £25 = £12.50</p> <p>Up to £50 = £37.50</p> <p>Up to £75 = £62.50</p> <p>Up to £100 = £87.50</p> <p>Up to £150 = £125</p> <p>Up to £200 = £175</p> <p>Up to £250 = £225</p> <p>Up to £300 = £275</p> <p>More than £300 = £325</p>
<p>Value of time of library users</p>	<p>Average weekly wage £446</p> <p>Average hours worked per week 32 hours</p>

APPENDIX 3 ANECDOTAL FEEDBACK FROM RESPONDENTS

Whilst not requested, a number of respondents added comments to their feedback forms. In order that this feedback is not lost it is recorded below. As the comments were not invited it is not regarded as a representative cross-section of views. However it does highlight the strength of feeling towards the services provided.

Scotland

	Comment
Glasgow	“The facilities are very good and the staff make this an enjoyable place to come for what you need to do. Staff very helpful. Could use kindle but I enjoy coming here” Knightswood
Highlands	<p>“I read book reviews and order those of interest. Seldom need to spend browsing time though do exchange ideas with excellent library staff.” Tain</p> <p>[If library no longer existed] “ Probably wouldn’t be able to access the amount of learning from being able to borrow books from library” Tain</p> <p>[If library no longer existed] “THIS MUST NOT HAPPEN!” Tain</p> <p>[If library no longer existed] “ I would panic I need this service and Tain is a long way from other sources” Tain</p> <p>“ I come to the library because the librarians have expertise and give help when needed” Tain</p> <p>“Do not know what I or my family would do without a library – have used it for at least 65 years” Tain</p> <p>“The library is the focal point and cornerstone of every local community and provide an invaluable service both in the products and services they provide but also their employees who have knowledge second to none. ” Ivergordon</p> <p>“In my opinion this library needs to open more – not any less! As often as it is open 3x weekly” Cromarty</p> <p>“Local school has sessions here which are invaluable to the children. Cromarty library is an integral part of the community.” Cromarty</p> <p>“I could never afford a tiny proportion of the wonderful books the library service enables me to read.” Cromarty</p> <p>“I am 84 years old and Birnam Library is a lifeline for me – thank you” Birnam</p> <p>“we have excellent library and very good service from staff” Breadalbane</p>
Shetland	“Library an invaluable service to the community which must be supported and kept available. Staff excellent”

S Ayrshire	"Libraries and Librarians are precious." Alloway
------------	--

Northern Ireland

Library	Comment
Bessbrook	" As a retired senior citizen I use (and appreciate) the library mainly for leisure purposes. Business, careers, jobs, trainings no longer interest me. I use the library to obtain books and internet information about hobbies and other interests. Also, of course, light reading to pass the evenings at home when tv programmes are not worth watching! Do NOT ever consider closing" Bessbrook Library. "
Keady	" The library is used as a social space to meet friends and other young mothers. It is invaluable as a focal point and a centre and for an area such as this which is socially, economically and disadvantaged in so many ways it is irreplaceable."
Hollywood Arches	"Thank you for the service provided. Our local library service is an extremely valuable and necessary resource, especially in today's economic climate."
Ormeau	" A library is a necessary community service. It cannot be valued financially." "Libraries are vital to our community – it's a free, safe place – one in which no one is excluded from the pleasure of books and a quiet, gentle space." "We are delighted with children's book club"

Wales

Local Authority	Comment
Carmarthenshire	The library is an excellent resource. Burry Port library is a modern vibrant environment. The pupils are introduced to the library and its services at a young age, hopefully they will develop into regular users, independently and that this wonderful resource will be available to the pupils of Burry Port for a very long time to come. It is a miracle resource. During our weekly visits the library is always a busy place. We are extremely lucky to have this resource and are very appreciative (Burry Port)
Carmarthenshire	The library is an extremely valuable and interesting community facility, providing an excellent range of services (Newcastle Emlyn) Would not be able to afford to buy the books I read (if the library closed) would have to go without. (St Clears)
Wrexham	Can't put monetary value on library service (Ruabon)