

# Economic and Social Impact of The London Library



**Nordicity**  
and  
**Saffery Champness LLP**

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## Glossary

ABS	Annual Business Survey
APS	Annual Population Survey
ASHE	Annual Survey of Hours and Earnings
BAME	Black, Asian and Minority Ethnic
BRES	Business Register and Employment Survey
COE	Compensation of employment
CPI	Consumer price index
DCMS	Department for Digital, Culture, Media & Sport
EWP	Emerging Writers Programme
FTE	Full-time equivalent
GVA	Gross value added
HMRC	<b>Her Majesty's Revenue &amp; Customs</b>
IP	Intellectual property
ONS	Office for National Statistics
SIC	Standard Industrial Classification

## Executive summary









First opened in 1841, The London Library (the 'Library') is now the largest independent lending library in the world, with 19 miles of bookshelves and more than one million volumes. The Library is a charity with a mission to inspire, support and promote the creation and sharing of knowledge and ideas through reading, writing and discussion. Over its long history it has provided this inspiration and support to some of the **UK's** most creative minds, and this continues today. The Library now seeks to place an economic value on this aspect of its role, and measure its social impact, as it looks to raise the funds necessary to expand its reach.

Similar to publicly accessible libraries, the Library generates economic value for its users and non-users. **Users gain value through access to the Library's collections.** Non-users place value on the Library because they recognise the important role it plays within society as a place where knowledge is preserved and shared.

In addition to the use and non-use value, the Library is unique in that it also plays a pivotal role in supporting the creation of intellectual property (IP) by its members – many of whom are among the UK's or the **world's most accomplished writers, screenwriters, playwrights** and journalists.

On an annual basis, the Library generates an estimated economic value of £21.3m for the UK, **or the equivalent of five times the Library's 2019-20 operating expenditures** of £4.3m. The Library also supports 460 jobs within the **UK's** creative and cultural industries.

### Summary of the annualised economic impact of the London Library

		Economic value (£m)	Employment (number of jobs)
	Use value (access to collections)	2.51	70
	Non-use value	3.00	--
	Fiction and non-fiction books	2.32	30
	Journalism	9.42	220
	Film and TV	2.83	100
	Theatre	0.34	20
	Visual arts	0.83	20
	Academic research	n/a	n/a
<b>Total</b>		<b>21.26</b>	<b>460</b>

Source: Nordicity estimates based on data from Library member survey (2020), IPA/WIPO, Hamborg et al. (2018), Mediatique (2018), BFI, Ofcom, Pact, Mandell (2017), SOLT, UK Theatre, MHM (2019), ONS and HMRC  
 n/a: estimates not available at the time of writing

In fact, on an annualised basis, **the Library's 7,240 individual members** are responsible for the creation of close to 700 fiction or non-fiction books, more than 15,000 newspaper or magazine articles, more than 230 film or TV screenplays, nearly 5,000 academic articles, more than 230 theatre scripts and more than £9m worth of art commissions or sales.

Members attribute a significant portion of their IP creation activity to their relationship with the Library. First and foremost, **the Library's collection and research resources play an important role in members' creation of IP. For many members creating IP, the Library is also an important place** for them to write in a productive manner. And for some members, the Library is a place where they can network, find peer support and gain valuable feedback on their work.

The type of IP created by Library members is the basis upon which the creative industries generate art forms and media enjoyed by readers and audiences around the world. The conversion of this IP into books, articles, films, TV programmes, theatre plays and artworks generates significant employment and economic activity for the UK. This is what drives the **Library's wider economic impact across the UK's creative industries** – which employed 2.1m people in the UK in 2019.<sup>1</sup>



*The London Library is a powerhouse for artistic creation.<sup>2</sup>*

- Lee Hall, screenwriter of the film, *Billy Elliot*

Alongside its economic impact, the Library is also generating a social impact, namely through its Emerging Writers Programme (EWP), Twenty in 2020 partnership with Jacaranda Books, Supported Membership scheme, memberships offered to charitable organisations, its Schools Partnerships Programme, and its half-price Young Person Membership for people aged 16 to 29.

In 2019, 384 writers and researchers participated in these programmes. A further 448 people accessed the Library through its Young Person Membership. Most of these participants would not have been able to access the Library without these programmes. For many, these programmes and the Library are having a positive impact on their writing careers. In particular, they are **helping to build participants' confidence** as writers and commitment to a writing career, whilst also expanding their peer networks.

These programmes are opening up opportunities in writing, publishing and the creative industries to people from socio-economic or ethnic groups that have historically found it challenging to gain a foothold in these fields.

The Library is an institution for stimulating world-class creativity whilst also lowering barriers to accessing the creative community in the UK. With increased public financial support, the Library will be able to invest in the physical spaces and outreach programmes that can help to even **further widen the Library's reach and accessibility beyond its traditional cohort of members.** In this way, the Library can continue to contribute to the **UK's world-leading position** in research, storytelling and creativity.

<sup>1</sup> DCMS (2020), "[DCMS Sectors Economic Estimates 2019: Employment](#)", 30 April 2020.

<sup>2</sup> Certain quotes presented in this study were gathered by the Library outside of the research for this study.

## 1. Introduction

### 1.1 Background

1. First opened in 1841, The London Library (the 'Library') is now the largest independent lending library in the world. Its location on St James's Square in central London houses 19 miles of bookshelves and more than one million volumes. All of **the Library's** collection is available to the public through one of its membership packages, daily or weekly admission tickets, or the inter-library loan system operated in partnership with public libraries. What is more, some 97% **of the Library's book collection is directly accessible to both** members and other patrons through its open-access shelves.
2. Over the years, many of the most famous writers have been members of the Library, including Charles Dickens, John Stuart Mill, Charles Darwin, George Eliot, Bram Stoker, George Bernard Shaw, Arthur Conan Doyle, Virginia Woolf, H. G. Wells, Daphne du Maurier, Aldous Huxley, Isaiah Berlin, Harold Pinter, Muriel Spark, Angela Carter and V. S. Naipaul. Living members (who have agreed to be publicly identified) include Jessie Burton, Hallie Rubenhold, Philippa Gregory, Sir Simon Schama, Lady Antonia Fraser, Victoria Hislop, William Boyd, Nikita Lalwani, Harriet Evans, Alan Bennett, Sir David Hare, Lissa Evans, Sir Tom Stoppard and Sir Kazuo Ishiguro. In fact, through its **180-year history, the Library's** membership roll has included five Poets Laureate and 11 Nobel Prize winners.
3. Many author members (all those listed above) have pointed to the Library as an important source of inspiration and support for their literary works. And many of these works have been turned into highly successful British films or West End theatre productions – attracting audiences from all over the world and yielding significant economic benefits for the UK.
4. The Library is intent on making this inspiration and facilitation available to as many people as possible. In recent years, the Library has restructured its membership rates and expanded its outreach programme. These initiatives have encouraged a significant increase in membership numbers and the use of the Library by many who would not otherwise have discovered it. The Library is now about to embark on the next phase of its redevelopment. This is expected to include capital improvements, which will enable a further expansion of its outreach and public-events programmes, as well as the creation of new study spaces to accommodate the growth in Library users, and break-out areas for members to discuss their work.
5. To realise this planned redevelopment, the Library will need to secure financial support from both philanthropic and public-sector sources. **Indeed, the Library's capital expansion** plans are timely, given the launch, in October 2019, of the £250m Cultural Investment Fund (CIF) by the Department for Digital, Culture, Media & Sport (DCMS).<sup>3</sup> Of this total

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<sup>3</sup> DCMS (2019), "[New £250 million Culture Investment Fund launched](#)", 12 October 2019.

funding, £125m has been set aside for regional museums and libraries.<sup>4</sup> In particular, the CIF will support upgrades to libraries' buildings and technology, so that they are "better placed to respond to the changing ways people are using them".<sup>5</sup>

6. To support its public advocacy and fundraising efforts, the Library commissioned Nordicity and Saffery Champness LLP to prepare a study of its economic and social impact. In particular, the study brief called for an examination of the contribution that the Library makes to the UK economy on an annualised basis.

## 1.2 The Library's membership

7. As of 31 March 2020, the Library had a total of 6,950 members, including 6,778 individual members and 172 institutional members (each with up to three individuals with membership access). Taken together, approximately 7,240 people can access the Library through either an individual or institutional membership.
8. On several counts, **the Library's membership** can be considered '**highly creative**'. This creativity spans all forms of literature and art, including published fiction and non-fiction, film and TV, live theatre, journalism, academic research and the visual arts. A survey of the **Library's members conducted in June 2020 found that approximately two-thirds** of members had been engaged in the creation of at least one form of intellectual property (IP) since they joined the Library. **In other words, approximately 4,750 out of the Library's 7,240 members** had been engaged in some type of IP creation. In fact, 45% of members had been engaged in the creation of two or more types of IP.
9. The creation of IP is an important driver of economic growth – both in general and in the **UK in particular. In the decade to 2019, the UK's creative industries** were one of the key sources of growth within the UK economy. According to statistics published by DCMS, employment in the creative industries increased by 34.5% between 2011 and 2019.<sup>6</sup> This rate of job creation was more than three times faster than the 11.4% expansion in employment across the overall UK economy during that period.<sup>7</sup> As of 2019, the creative industries employed more than 2.1m workers, or 6.3% of all of the **UK's employed workers**.<sup>8</sup>

## 1.3 Relevant studies

10. Public and private libraries can generate economic and social impacts through numerous channels. Previous studies conducted by Nordicity and other economic consultancies have estimated the economic value derived by library patrons from access to print and digital collections, free internet services, and education and training. These studies have also **examined the 'non-use' value placed on libraries by people who do not use them**, but

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<sup>4</sup> DCMS (2019).

<sup>5</sup> DCMS (2019).

<sup>6</sup> DCMS (2020), "[DCMS Sectors Economic Estimates 2019: Employment](#)", 30 April 2020.

<sup>7</sup> DCMS (2020).

<sup>8</sup> DCMS (2020).



recognise the important role they play within society – as places where knowledge is preserved and shared.

11. Most of the economic and social impact research to date has focused on the value that *public* libraries generate for their patrons and wider society, even though they do not typically charge fees to their patrons for direct use.
  - A 2005 study of the economic value of **Bolton's public libraries** used contingent valuation methods to ascertain the monetary values that local users and non-users placed on **the town's** 15 public libraries.<sup>9</sup> The analysis found that the local population placed an annualised value of £5.6m on **Bolton's** public libraries, or 1.24 times the annual cost of running those libraries.<sup>10</sup>
  - A 2013 economic valuation of the British Library – which also employed contingent valuation methods – found that its patrons and non-users placed a value of £527.3m on its Reading Room, web services, UK Research Reserve and other services.<sup>11</sup> This was equal to 4.9 times its annual operating budget during the 2011/12 fiscal year.
  - In 2016, Nordicity completed a study of the economic and socio-cultural impact of the public libraries in Edmonton, Canada. That study focused on the use **value of the libraries' collections and services**, and concluded that they generated CAD 187m in 2015, or CAD 3.11 for every dollar invested by local **government in the libraries' operations**.<sup>12</sup> The study also investigated the educational, social, community and cultural impacts of **Edmonton's public** libraries, through their various initiatives and roles within local communities.
12. In addition to the conventional channels of economic impact investigated in these other studies, the Library is arguably unique in the role it plays in stimulating literary creativity **and helping to drive economic activity within the UK's creative industries**. As alluded to earlier, many of the British novels, non-fiction writing, screenplays and stage plays associated with members can be traced back to the inspiration they – working in their capacities as writers or researchers – gained from their access to the Library.
13. **With that in mind, the Library sought a 'first-of-its-kind' economic and social impact analysis** that could not only quantify the value associated with the conventional library impact channels – namely its use and non-use value – but also credibly apportion part of the tremendous economic value generated by **the UK's creative industries** back to the Library itself.

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<sup>9</sup> Jura Consultants (2005), *Bolton's Museum, Library and Archive Services: An Economic Valuation*, December 2005, p. i.

<sup>10</sup> Jura Consultants (2005), p. iii.

<sup>11</sup> Oxford Economics (2013), *Economic Valuation of the British Library*, January 2013, pp. 1-2.

<sup>12</sup> Nordicity (2016), *The Economic and Socio-cultural Impact of the Edmonton Public Library*, March 2016, p. 3.

#### 1.4 Outline of report

14. The following report presents the results of our (the **study team's**) analysis of the economic and social impact of the Library. Section 2 outlines the research methodology used to prepare the study. **Section 3 investigates Library members' capacity for IP creation and the role that the Library plays in their creative process.** Section 4 details the results of the analysis of the economic impact of the Library **through its members' creation of IP.** **Section 5** discusses how the Library is also generating a social impact and how it could increase this impact in the future. Section 6 summarises our key findings with regards to the **Library's economic and social impact.**

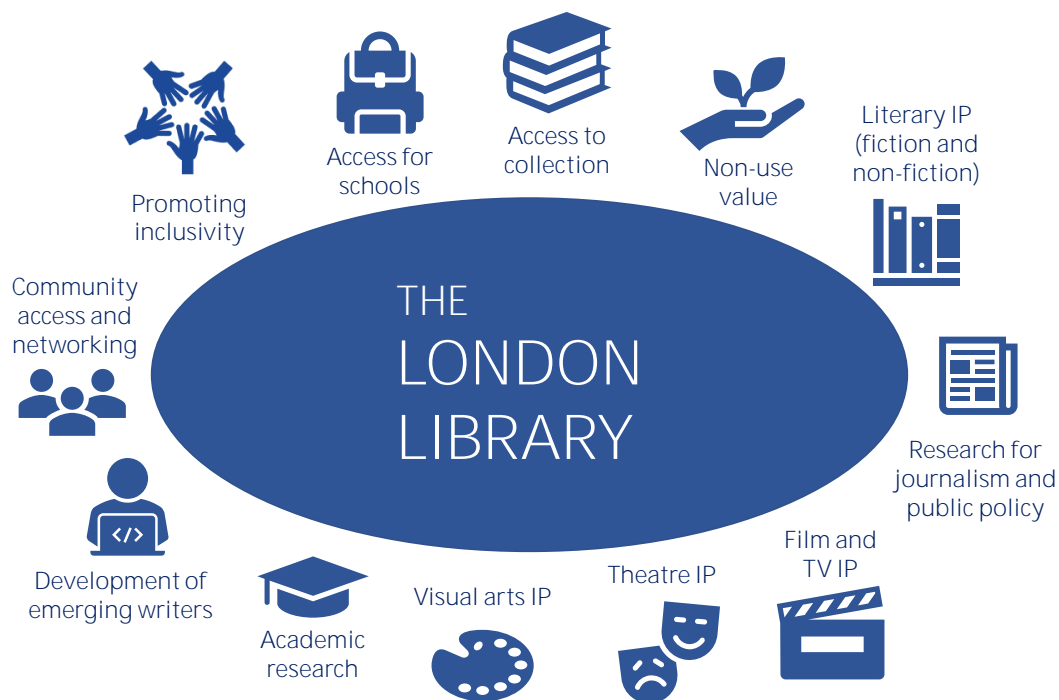
## 2. Methodology

15. To prepare this analysis and report, we used a combination of primary research, desk research and economic impact modelling.

### 2.1 Research framework

16. The research and analysis for this study were guided by the framework depicted in Figure 1. This framework recognises that the Library – like other libraries – can generate an economic and social impact through myriad channels. These include access to its collection; non-use value; supporting the creation of IP across academia, the media and the arts; supporting the development of emerging writers; and promoting inclusivity and diversity in writing and the wider creative sector.

Figure 1 **Research framework: the Library's channels of economic and social impact**



### 2.2 Primary research

17. The primary research consisted of an online survey of Library members, surveys of participants in the Emerging Writers Programme (EWP) and the Twenty in 2020 programme, and interviews with a smaller sample of members.
18. The online survey of members was developed and administered by Morris Hargreaves McIntyre (MHM) and conducted in June 2020. The survey largely consisted of questions for **MHM's own analysis of the Library's membership**; however, Nordicity added several questions to **MHM's** questionnaire, in order to collect data on the types of IP created by

members and the volume of that IP creation. The survey was also used to assess attribution **of the Library's resources to members' IP creation process**, and to assess how holders of Supported Membership viewed the impact of the Library on their professional careers.

19. **MHM's online survey of members received a total of 1,270 responses** – equal to 17.5% of the Library's 7,240 individual members. This response rate means that the survey results are subject to a margin of error of  $\pm 3\%$ , 19 times out of 20 (i.e. 95% confidence interval).
20. **Separate from MHM's online member survey**, the Library distributed survey questions on behalf of Nordicity to participants of the EWP and Twenty in 2020 programmes. The EWP survey received responses from 18 of the 38 participants. The Twenty in 2020 survey received responses from 7 out of the 20 participants.
21. This survey research was complemented by research interviews conducted with 21 Library members. These interviews were used to gather further insights into how the Library **contributed to members' IP creation, as well as observations regarding the Library's social impact**. The interviews were also used to prepare the six case studies included in this report. Table 1 summarises the profile of interviewees. A list of all the interviewees can be found in Appendix A.

Table 1 Number of research interviewees

	Number <sup>1</sup>
Film/TV screenwriter	6
Non-fiction book author	5
Fiction book author	4
EWP participant	4
Journalist	2
Theatre playwright	2
Institution / Last resort	2
Twenty in 2020 participant	2
Academic writer	1

Source: Nordicity

1. The sum of the number of interviewees in each category will exceed the total number of interviewees because some interviewees are involved in the creation of more than one type IP or participate in the EWP or Twenty in 2020 programme whilst also creating IP.

## 2.3 Economic impact analysis and modelling

### 2.3.1 Use and non-use value

22. As noted in Section 1.3, previous studies of the economic value of public libraries had to employ contingent valuation methods because the vast majority of patrons did not have to pay to use libraries. And, of course, non-users do not even use the library to begin with. These contingent valuation methods focused on ascertaining the monetary value that users and non-users **would be 'willing to pay' to use the library or preserve its existence**. As part of contingent valuation research, library users and non-users were also asked what **monetary amount they would be 'willing to accept' to compensate them under a scenario** where a specific library was no longer accessible.

23. There is less need to use contingent valuation methods to estimate the economic value of the use and non-use of the Library. Unlike public libraries, the Library charges fees for access. These fees already reveal the minimum monetary amount that users are willing to pay to access the Library. Economic theory would suggest, of course, that the value that users place on the Library would be higher than the fee they pay for access, otherwise they would not pay the fee.
24. This study did not conduct contingent valuation research of Library members and non-members. Instead, it has reverted to the market value of access to the Library – as revealed by its collected fees – **to estimate the economic value of use. In this regard, this study's** estimate of the economic value of use should be viewed as a conservative one.
25. Similarly, this study did not employ contingent valuation methods to estimate the economic value of non-use. Instead, it reverted to the value directly revealed by inactive **members' fees and the philanthropic income received by the Library.** In this regard, the estimate of non-use value may also be considered conservative because it does not capture the consumer surplus that non-users and donors invariably derive beyond the value of their fee payments or donations.

#### 2.3.2 IP creation

26. To estimate the contribution that the Library makes to the UK economy, we sought to isolate the portion of the economic rents generated in various creative industries that could be attributed to Library members. 'Economic rent' or 'rents' refers to the economic return captured by inputs to the production process in excess of their opportunity cost. This could, for example, include the wage premium earned by certain occupations or workers within certain industries. It could also include some portion of the operating profits earned by a company or an industry on account of unique assets.
27. **In the context of the Library's economic impact,** we assumed that the economic rents generated within the relevant creative industries (e.g. book publishing) were linked to the IP exploited by those industries. In other words, we assumed that the wage premiums and excess operating profits within each industry comprised the economic rents generated by **that industry's IP.**
28. **The Library's impact on employment was estimated by first** calculating its annual share of the IP created in the UK and then using the IP share to pro-rate total employment in the respective creative industry.

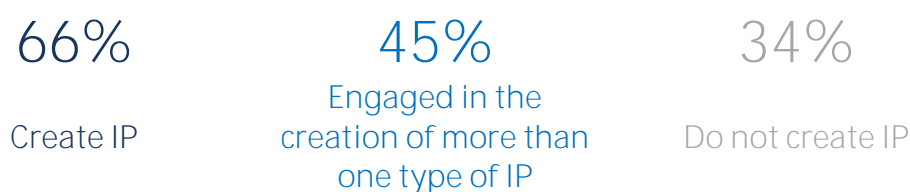
### 3. IP creation at the Library

29. The following chapter presents the details of the research and analysis of the economic impact associated with Library members' creation of IP.

#### 3.1 Overview **of members' IP creation**

30. As noted in Section 1.2, Library members are highly creative in terms of their record of IP creation. Two-thirds of members were engaged in the creation of some form of IP during their membership tenure, and 45% of members reported that they engaged in the creation of multiple types of IP, such as books alongside film and TV screenplays (Figure 2).

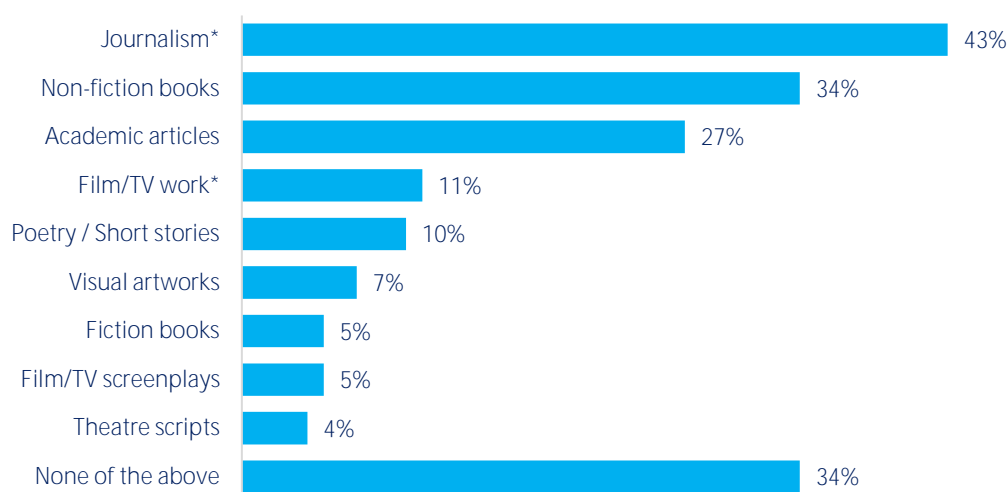
Figure 2 Incidence of IP creation among Library members



Source: Library member survey (2020)

31. The creation of newspaper, magazine or non-academic articles was the most common form of IP creation (43% of members), followed by the writing of non-fiction books (34%) and academic articles (27%) (Figure 3).

Figure 3 Share of members creating various types of IP



Source: Library member survey (2020)

\* Includes non-academic articles

\*\* Includes research and other work in film and TV development and production other than the writing of screenplays

32. A smaller cohort of members work in the film and TV sector. Approximately 5% of members reported that they wrote at least one film or TV screenplay whilst they were a member, and 11% worked in other aspects of film and TV development and production, such as research.

33. Approximately 10% of members reported that they had written a poem or a short story during their membership and 5% had written fiction books. Approximately 7% of members said that they were engaged in the creation of visual artworks, while 4% had written at least one theatre script.

### 3.2 Role of the Library in the creative process

34. Through the survey and interview research, we found that members could be grouped into three general categories in terms of the role that the Library plays in their creative process.
- i. Creators who value the **Library's** collection and research resources
  - ii. Creators who use the Library as a place to write
  - iii. Creators for whom the Library is a place to work and network

#### **Creators who value the Library's collection and research resources**

35. First and foremost, many creators value the access to the **Library's** collection and research resources, which provide information and inspiration for their creative process. This group includes creators who do their writing whilst at the Library, but also those who simply borrow from the Library – in person or by post – but prefer to work from home or another location.
36. For this group, the Library is a unique source of information they can draw on for their creative works. Whilst the Library is not a legal deposit library such as the British Library or the National Archives, for creators, this is outweighed by the accessibility to the bookshelves that it offers. Many writers and creators pointed to serendipitous discoveries that this access afforded them. They discussed how they would be looking for a book in the **Library's** topic-based shelves and would then stumble upon a unique or obscure book that would open up an entirely new path in their storytelling, or add a richness to their story that they would not have otherwise been able to attain.



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*There's a lovely atmosphere. I often come in to browse and find not the book I'm specifically looking to find but something that's next to that book, and that's the beauty of The London Library.*

- Victoria Hislop

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37. This sort of serendipitous discovery is particularly important to the creative process and one of the aspects that differentiates it from scientific or academic research. Importantly, such serendipitous discovery cannot be replicated at the British Library where books have to be pre-ordered and there is no public access to the bookshelves. So, whilst the British Library is suitable for many types of academic research, it is arguably not as well-suited to the creative process.

38. The Library's collection and research resources is not just of value to writers of non-fiction. Fiction writers also draw upon books in the Library's collection to find information on topics or historical settings relevant to their narratives. Even some fiction writers who derive most of their ideas from their own life experiences or imagination found value in the Library's collection. In some cases, novelists would seek books written by or about other authors to find inspiration for their own writing.



*I've used books in the Library for inspiration for the atmosphere and setting of my own novel.*

- Novelist member

*I write fiction. It is primarily from my imagination. But there are times when I may need to read not only the books of other writers, but about them, for inspiration; and to know why writers like Dickens had such popular appeal, in their days, and continue to be relevant even today.*

- Novelist member

39. This group of creators value not only the Library's physical and online resources, but also the knowledge and expertise of its staff. This was of particular importance to many emerging writers enrolled in the EWP. They not only reported how helpful the librarians were in exposing them to new content, influences and information, but also how supportive they were.

Creators who use the Library as a place to write

40. For another group of members, the Library was primarily a place to write. Writing is often a solitary pursuit and many members noted how important it was to have a suitably quiet and comfortable place to write. For some writers living in London, it is not an option to write from home or local cafés. The Library offers this group a location in central London where they know they can find a comfortable spot to spend the entire day writing – and be highly productive. Unlike at the British Library or other public libraries, this group of members can come and go at the Library without having to pack up their valuables each time. They can, in effect, treat the Library as an office. This in itself adds a degree of professionalism to their writing, even if it is not their primary occupation at that particular time. Furthermore, the Library is known as a highly productive space due to its quiet reading rooms, as well as its highly knowledgeable and supportive staff.
41. By offering writers a place to write, the Library is having an important positive impact on their creativity and contributing to the short- and long-term development of the UK's creative industries. Research conducted by The Royal Society of Literature (RSL) found that 80% of writers believed that having a 'room of their own' or simply 'space to write' was a



key factor in their writing careers.<sup>13</sup> Indeed, the need for a ‘room’ or ‘space’ was highlighted more than any other single factor including even financial support (58%).<sup>14</sup>



*There is nowhere in central London more perfectly suited to the alternating waves of industry and laziness that constitute the writing life.*

- Lara Feigel, writer and academic

*The London Library is my favourite place to work... it is the most glorious place and I think if you're a writer it's very important to be around other people who are working.*

- Daisy Goodwin, creator of the TV series, *Victoria*

Creators for whom the Library is a place to work and network

42. For a third group of writers and creators, the Library is not only a place to work but also a place to interact with other writers, creators and members – both professionally and socially. For this group, the Library is a place where they can obtain feedback and ideas from other creators. Writers may seek recommendations on research materials or feedback on cover designs for their books, for example.
43. An environment where writers can gain ongoing feedback on their work is beneficial to their professional development and thereby raises the quality and appeal of their writing. The Library is also, in some respects, providing a physical and human platform for **advancing the quality of many of the UK's creative industries**, such as book and periodical publishing, film and TV production, and theatre.
44. **This is also borne out by the RSL's research. Not only did 80% of writers point to a room or space as a key factor in their writing, but 65% indicated that peer support was a key factor, and 60% cited emotional support as a key factor.**<sup>15</sup> Peer support was even more important to writers not yet earning from their writing (77%) compared with those who were earning (56%).<sup>16</sup> For many writers, the Library is an significant source of peer and emotional support. This is particularly the case for those participating in the EWP, but also in general, **across the Library's membership.**



*What gyms can do for your body, this magical place can do for your mind.*

- Stephen Fry

<sup>13</sup> The Royal Society of Literature (2019), [A Room of My Own: What Writers Need to Work Today](#), pp. 11-12.

<sup>14</sup> The Royal Society of Literature (2019), pp. 11-12.

<sup>15</sup> The Royal Society of Literature (2019), pp. 11-12.

<sup>16</sup> The Royal Society of Literature (2019), pp. 11-12.

### 3.3 Attribution

45. The fact that such a large percentage of Library members are engaged in the creation of IP does not necessarily mean that the Library itself *causes* the creation of this IP or plays an important role in its creation. Through the member survey, however, we asked members to self-report what portion of the creative process they would attribute to their Library membership, and the access to information, support and other resources that it offers.



*To be honest, I don't think I could have written Victoria without the London Library – this is the most fantastic place.*

- Daisy Goodwin, creator of the TV series, *Victoria*

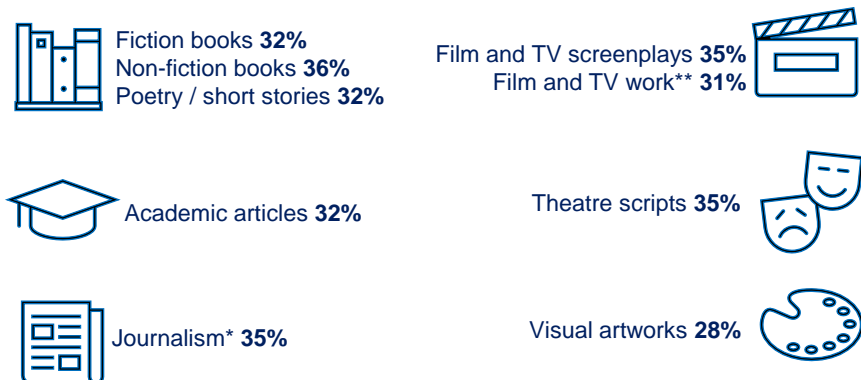
*The London Library has played a central part in my studies. It has been invaluable.*

- Peter Ackroyd

46. When asked how much of the information and inspiration for IP creation could be attributed to the Library, members consistently reported average attribution rates of just over 30%. Only the attribution rates for the creation of visual artworks were lower (Figure 4).

Figure 4 Attribution rates

*Considering all of the sources of research and inspiration that you draw upon to create your intellectual property, what percentage contribution would you attribute to being a member of The London Library and the resources, community and inspiration that it offers you?"*



Source: Library member survey 2020

\* Includes non-academic articles

\*\* Includes research and other work in film and TV development and production other than the writing of screenplays

### Giles Milton

Giles Milton is a highly successful British author specialising in historical narratives. He has been a member of the Library since 1994, and during that period, has written 20 books, including 13 works of non-fiction, three works of fiction and four **children's books**. **His most successful work** to date was his 1999 best-selling non-fiction *Nathaniel's Nutmeg*, which was subsequently serialised on BBC Radio 4.

For Giles, the Library plays an important role in many facets of his work, whilst also being a significant part of his social network.

For an author of historical narratives such as Giles, the Library's collection is extremely valuable, all the more so because they **can directly access the stacks to browse and "stumble across stuff that you didn't know was there"**.

Whilst the Library does not have an extensive archival collection to match some other libraries, **according to Giles, it has a "fabulous" collection of secondary sources of historical information**. He finds that the ability to access the stacks at the Library makes it more conducive to his research and writing process than the deposit libraries. **He also finds the Library's unique topic-based shelving system to be very helpful**.

Two of Giles's books, *Nathaniel's Nutmeg* and *Samurai William*, were set in the Far East. The **Library's collection of the entire archive of the East India Company was indispensable to his research for these two works**.

Giles also does all of his writing at the Library; he goes to the Library almost every day when he is writing.

The Library acts much like an office for Giles – a place where he can also find professional support. While there, he taps into the network of other writers, creative people and friends that he has met at the Library over the years. He will often **"bounce ideas off" people he knows at the Library**, and is part of an informal support network of writers who ask each other to read their work from time to time.

Library membership has allowed Giles to expand his professional network beyond the writing and publishing community. He has had the opportunity to meet and become close friends with people from across the arts and culture sector. Indeed, through the Library he has expanded his network of contacts within film and TV – which is important for a writer whose **work can make for compelling screen content**. In fact, two of Giles's books, *Nathaniel's Nutmeg* and *Churchill's Ministry of Ungentlemanly Warfare*, are under option and will hopefully make it onto screens in the UK, US and other countries in the future.

Source: see Appendix C

## 4. Analysis of economic impact

47. In the following chapter, we present our analysis of the economic impact attributable to the Library through use and non-use value placed on the Library, as well as its support of **members' creation of IP**.

### 4.1 Use value (access to collections)

48. At the core of the **Library's economic impact is the value that it provides** to members through access to its collections of books and other research resources – **i.e. the Library's use value**. Previous economic valuations of public libraries have typically focused on this use value.

- A 2005 study of Bolton's public libraries concluded that they had an annualised use value of £4.4m (out of a total economic value of £5.6m).<sup>17</sup> This value was **associated with just under 1.5m visits across Bolton's 15 libraries in 2004**.<sup>18</sup> In other words, an average of £2.93 per visit.
- A 2013 study of the British Library concluded that the use value of its Reading Room, web services, exhibitions and other patron services had an annualised value of £144m during the 2011/12 fiscal year.<sup>19</sup> With 1.5m annual visitors in 2011/12,<sup>20</sup> this use value equated to £96 per visitor.

49. As noted in Section 2.3.1, the use value of the Library was approximated by reverting to the market value placed on the Library by its members and patrons via the fees paid for annual or ad hoc access, or its other services (e.g. inter-library loans). In 2018/19, the Library earned a total of £2,706,247 from these sources.<sup>21</sup> From that total, we deducted an estimated £193,670 associated with inactive members (see Section 4.2 for further discussion). We conclude, therefore, that based on the market value of the **Library's** services, it generates, at a minimum, an annual use value of £2.5m.

### 4.2 Non-use value

50. Previous economic valuations of public libraries have also included analyses of the value that non-users place on those libraries.

- **The 2005 study of Bolton's public libraries concluded that non-users placed an annualised value of just under £1.2m on its libraries**.<sup>22</sup>
- In the 2013 study of the economic value of the British Library, its non-use value was estimated at £412.8m, and thereby accounted for 78% of the total value of

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<sup>17</sup> Jura Consultants (2005), p. iii.

<sup>18</sup> Jura Consultants (2005), p. i.

<sup>19</sup> Oxford Economics (2013), p. 3.

<sup>20</sup> Oxford Economics (2013), p. 1.

<sup>21</sup> London Library (2020), p. 25.

<sup>22</sup> Jura Consultants (2005), p. iii.

the library's economic benefits (£527.3m).<sup>23</sup> This non-use value captures the value that non-users would place on 'preserving' the library for their own use in the future (i.e. 'option value') or the use of others (i.e. 'bequest value').<sup>24</sup> It can also include the value that non-users place on a library simply to preserve its existence as a cultural asset (i.e. 'existence value').<sup>25</sup>

51. The non-use value of cultural assets is typically investigated and quantified using contingent valuation methods. In particular, non-users within the general public are asked how much they would be willing to pay to keep the cultural asset open and accessible to its users. This approach is suited to cultural assets that are publicly accessible, and specifically free of charge.
52. For the Library, we estimated the non-use value by first estimating the fee revenue collected from members who are not actively using their membership (i.e. 'inactive members'). To this estimate, we added the Library's philanthropic revenue. This resulting figure, in our view, reflects the option, bequest and existence values placed on the Library by its members and non-members.
53. Member research commissioned by the Library in 2019 found that approximately 5% of members had been inactive during the previous 12-month period.<sup>26</sup> In other words, at any given time, the Library is likely to have approximately 360 inactive members (5% x 7,240 ≈ 360). The annual membership fee of £535 points to a non-use value of £193,670.
54. In 2018/19, the Library received £2,816,153 in fundraising income.<sup>27</sup> In total, therefore, we estimate that members and non-members placed a non-use value of approximately £3m on the Library on an annual basis (Table 2).

Table 2 Non-use value of the Library

	Amount
Membership fees paid by inactive members	£193,670
Fundraising income (2018/19)	£2,816,153
Total: Non-use value	£3,009,670

Source: Nordicity estimates based on data from MHM (2019) and London Library (2019)

<sup>23</sup> Oxford Economics (2013), p. 2.

<sup>24</sup> Oxford Economics (2013), p. 7.

<sup>25</sup> Oxford Economics (2013), p. 7.

<sup>26</sup> Morris Hargreaves McIntyre (2019), *Growing Membership, Deepening Relationships: The London Library Membership Research*, January 2019, p. 18.

<sup>27</sup> London Library (2019), *Annual Report and Accounts 2018-2019*, p. 12.

#### 4.3 Fiction and non-fiction books IP

55. Whilst the writing of fiction and non-fiction books are two very distinct forms of IP creation, for the economic impact analysis, we have combined them in order to align the analysis with available statistics for the UK's book publishing market.
56. **The survey results indicate that the Library's 7,240 members are responsible for authoring 86 fiction books and 630 non-fiction books on an annualised average basis (Table 3). In total, therefore, Library members are responsible for authoring an estimated 716 books on an annual basis. This is equivalent to 0.10 books per member per year or 0.25 books per author-member per year.**

**Table 3 Annualised<sup>1</sup> number of published books authored by Library members**

	Fiction	Non-fiction	Total
Raw survey result	14.5	104.6	119.1
Response rate <sup>2</sup>	96%	95%	--
Across Library membership <sup>3</sup>	86	630	716
Per member	0.01	0.09	0.10
Per author <sup>4</sup>	0.24	0.26	0.25

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported units of created IP (e.g. the number of books published) as a percentage of the total number who indicated that had written a published book.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported having written a published book.

57. In 2018, approximately 188,000 books were published in the UK.<sup>28</sup> Therefore Library members were responsible for authoring approximately 3.8 of every 1,000 titles published in the UK on an annual basis.
58. **When the Library's IP share (0.38%) is applied (along with the 34% attribution rate for books) to the total employment and economic rents generated within the UK's book publishing industry, we find that 30 jobs<sup>29</sup> and £2.3m in economic value (i.e. economic rents) can be attributed to the Library (Table 4).**

**Table 4 Calculation of the Library's annualised share of economic activity in the book publishing industry**

	Employment	Economic rent
SIC 58.11 Book publishing industry [A]	25,000	1,795
Library's IP share [B]	0.38%	0.38%
Library's IP creation attribution rate [C]	34%	34%
<b>Library's share of economic contribution [D]</b>	<b>30</b>	<b>2.3</b>

Source: Nordicity estimates based on data from Library member survey (2020), IPA/WIPO, ONS and HMRC

A. See Appendix B

C. See Section 3.3

D = A x B x C

<sup>28</sup> IPA, WIPO (2020), [The Global Publishing Industry in 2018](#).

<sup>29</sup> Throughout this study, employment estimates have been rounded to the nearest 10.

#### William Boyd CBE

William Boyd is one of **the UK's most prolific and accomplished writers of fiction, non-fiction, film and TV screenplays and most recently stage plays.** William joined the Library in 1983. He had just moved to London from Oxford and was looking for a library to replace the Bodleian Libraries that he had **enjoyed whilst a lecturer at St Hilda's College.**

William has written 16 novels, 14 of which whilst being a member of the Library. Many of his novels have garnered critical acclaim and his 2006 work, *Restless*, won the Costa Book Award for Best Novel, and was adapted for TV as a BBC mini-series in 2012. His 1998 novel, *Armadillo*, was adapted by William himself and aired as a three-part series on the BBC in 2001. And his adaptation of his 2002 novel, *Any Human Heart*, aired on Channel 4 in 2010 and won the BAFTA for Best Series.

He has also written screenplays for *Stars and Bars*, *Mr. Johnson*, *Aunt Julia and the Scriptwriter*, *A Good Man in Africa*, *The Trench*, *Man to Man*, *Scoop*, *Sword of Honour* and **1992's Chaplin**, which was directed by Richard Attenborough and received three Oscar nominations.

Since 2009, William has had three plays produced: *Six Parties*, *Longing* and *The Argument*.

In the early years of his Library membership, William would spend nearly every day at the Library writing. In the pre-internet 1980s, libraries such as this were essential for researching for a book. In fact, his 1987 novel, *The New Confessions*, was written entirely at the Library.

The Library also became something of a literary and social hub for William. He knew the chief librarian at the time from his Oxford days and would bump into other people he knew from within the literary or wider creative community.

Over the years, William has come to use the Library much less as a place to write – he now writes from home – but for him it will always be a fantastic place to find books and do research. He makes particular **use of the Library's newspaper and periodical archives** – something that cannot be found on the internet.

William also still loves to wander between **the Library's stacks. Indeed, for him and other novelists, it is this freedom to explore that is so important to their creative process** – something that cannot be duplicated at the British Library or on the same scale by other libraries outside of the higher education community.

Sources: see Appendix C

## 4.4 Journalism

59. **The survey results indicate that the Library's 7,240 members write more than 15,000 non-academic articles on an annual basis (Table 5).** This includes articles written for newspapers, magazines and other periodicals, other than academic journals. This volume of writing is equivalent to 2.1 articles per member per year, or 5.1 articles per creator per year.
60. We estimate that in the UK, approximately 4,500 non-academic articles are published every day, including an estimated 3,800 newspaper articles<sup>30</sup> and an estimated 700 magazine and periodical articles. Altogether, approximately 1.6m articles are published annually in the UK. Library members, therefore, were responsible for writing 9.6 of every 1,000 non-academic articles published in the UK on an annual basis.

<sup>30</sup> Hamborg, F., Meuschke, N., Gipp, B. (2018), "Bias-aware News Analysis Using Matrix-based News Aggregation", *International Journal of Digital Libraries*, May 2018, p. 12.

Table 5 Annualised<sup>1</sup> number of non-academic articles written by Library members

	Amount
Raw survey result	1,352
Response rate <sup>2</sup>	49%
Across Library membership <sup>3</sup>	15,764
Per member	2.2
Per non-academic writer <sup>4</sup>	5.1

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported units of created IP (e.g. number of articles) as a percentage of the total number who indicated that they had written a published article.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported that they had written a published article.



*There is nothing like The London Library which is, for me, intellectual refuge, essential research centre, treasure-house.*

- Andrew Marr

61. When the Library's IP share (0.96%) is applied (along with the 35% attribution rate for non-academic IP creation) to the total employment and economic rents generated within the UK's newspaper, journals and periodicals industry, we find that 220 jobs and £9.4m in economic value can be attributed to the Library (Table 6).

Table 6 Calculation of the **Library's annualised** share of economic activity in the newspaper, journal and periodicals industry

	Employment	Economic rent
SICs 58.13+58.14 Publishing of newspapers, journals and periodicals [A]	69,250	£3,297m
Library's IP share [B]	0.96%	0.96%
Library's IP creation attribution rate [C]	35%	35%
<b>Library's share of economic contribution [D]</b>	<b>220</b>	<b>£9.4m</b>

Source: Nordicity estimates based on data from Library member survey (2020), Hamborg et al. (2018), Mediatique (2018), ONS and HMRC

A. See Appendix B

C. See Section 3.3

D = A x B x C



#### Jack Shenker

Jack Shenker is an award-winning British journalist and author. He first joined the Library in 2011 through the Supported Membership, which offers subsidised membership to individuals who are studying, undertaking research, writing a book, or **require the Library's resources** for other reasons compatible with its aim of advancing education, learning and knowledge.

Whilst being a Library member, he has written two non-fiction books and hundreds of articles for The Guardian, The New York Times, London Review of Books, Granta, and numerous other newspapers and periodicals around the world. His article and photo essay on the Essex port town of Tilbury was also adapted into a film and broadcast on BBC Newsnight.

**Jack's first book, *The Egyptians: A Radical Story*, was published in 2016 and selected as 'Book of the Year' by The Observer, The Economist and Kirkus Review. It was also shortlisted for the 2016 Bread and Roses Award.**

His second book, published in 2019, is titled *Now We Have Your Attention: The New Politics of the People*.

As a freelance journalist, Jack initially saw the Library as primarily a place to work. In fact, he wrote large parts of both of his books at the Library and, of course, many of his articles. Over time, Jack discovered that **the Library's rich collection of books and other resources advanced** his own research and helped satisfy his own personal interest in reading across diverse topics.

**For his first book, the Library's collection offered books covering Egypt's history** going back to its time under British rule. **Like many of the Library's other author members, Jack** found that browsing the stacks resulted in the serendipitous discovery of relevant books that were over 100 years old.

**Jack's** latest book explores more contemporary issues in British politics. And here too the Library has an extensive collection of relevant works that could only be replaced by costly personal purchases.

For Jack, Library membership also offers a sense of belonging to a community of journalism professionals and other creative people – many of whom may have worked in a newsroom, or at a magazine office or broadcaster. From time to time, Jack will run into his own editors and **other people from the journalism community in the Library's rooms and halls**. What started out as a quiet and comfortable desk space in the West End has, at times, come to resemble a newsroom – but with an even more diverse group of colleagues.

Source: see Appendix C

#### 4.5 Film and TV

62. The survey results indicate that the Library's 7,240 members are responsible for writing, on an annual basis, 114 film screenplays and 120 TV screenplays, or a total of 234 screenplays (Table 7). This is equivalent to 0.03 screenplays per member per year or 0.64 screenplays per screenwriter per year.

Table 7 Annualised<sup>1</sup> number of film and TV screenplays written by Library members

	Film	TV	Total
Raw survey result	17.2	18.2	35.4
Response rate <sup>2</sup>	88%	87%	--
Across Library membership <sup>3</sup>	114	120	234
Per member	0.02	0.02	0.03
Per author <sup>4</sup>	0.31	0.33	0.64

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported units of created IP (e.g. the screenplays) as a percentage of the total number who indicated that they written and screenplay.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported that they had written a screenplay.

63. Whilst there are no reliable statistics on the total number of films and TV programmes produced in the UK annually, Nordicity analysed data from the British Film Institute (BFI), Ofcom and Pact, and has concluded that there is likely to be approximately 2,000 films and TV programmes produced in the UK annually, excluding news and sports programming. This includes both scripted and non-scripted programming.
64. Research conducted by Nordicity also indicates that, in any given year, approximately 2.5% of professional screenwriters are earning income from scriptwriting.<sup>31</sup> This success rate implies that on an annual basis, five or six of the 234 screenplays written by Library members would be in production. This rate of screenplay success also implies that scripts written by Library members account for 2.7 or every 1,000 film and TV projects in the UK annually, or an IP share of 0.27%.
65. When the Library's IP share (0.27%) is applied (along with the 35% attribution rate for film and TV IP) to the total employment and economic rents generated within the UK's film and TV industry, we find that 100 jobs and £2.8m in economic value can be attributed to the Library (Table 8).

<sup>31</sup> Mandell, C. (2017), "What are Your Real Chances of Scriptwriting Success?" *Script*, 5 July 2017.

Table 8 Calculation of the **Library's annualised** share of economic activity in the film and TV industry

	Employment	Economic rent
SIC 59.1 Motion picture, video and television programme activities industry [A]	102,000	£3,027m
Library's IP share [B]	0.26%	0.26%
Library's IP creation attribution rate [C]	35%	35%
<b>Library's share of economic contribution [D]</b>	<b>100</b>	<b>£2.8m</b>

Source: Nordicity estimates based on data from Library member survey (2020), BFI, Ofcom, Pact, Mandell (2017), ONS and HMRC

A. See Appendix B

C. See Section 3.3

D = A x B x C

### Deborah Davis

Deborah Davis is a lawyer, historian, journalist, scriptwriter, and film and TV producer. She first joined the Library in 1988 and, over the years, has written for film, TV, theatre and radio.

She is best known for co-writing *The Favourite* (2016), which was directed by Yorgos Lanthimos and starred Olivia Colman, Emma Stone and Rachel Weisz.

*The Favourite* was filmed at various locations around London and the South East, including Hampton Court Palace, Hatfield House and Danson House. And with a production budget of just over £11m, the film generated an estimated 250 full-time equivalent jobs (FTEs) of employment in the UK along with £13m in GVA.<sup>32</sup>

The film won the Grand Jury Prize at the 2018 Venice Film Festival and was nominated for five Golden Globes and 10 Oscars, including Best Picture and Best Original Screenplay. Its lead, Olivia Colman, won the Oscar for Best Actress. The film won seven BAFTAs in 2019, including Best Picture and Best Original Screenplay for Deborah.

*The Favourite* was also a tremendous box office success. It earned an estimated £73m globally at cinemas – nearly seven times the cost of production. Over a third (£25m) of this global box office came from North America, thereby, indicating the export value of this British television programme.

Deborah could not have written *The Favourite* without her Library membership. Whilst she did not write the script at the Library, it was an essential resource for the historical background of the story and the script. Indeed, she carried out virtually all of the research for the film at the Library.

At the Library, Deborah was able to find and draw upon original sources (letters and diaries), together with historical accounts and biographies related to **Queen Anne's court, including Winston Churchill's biography of the Duke of Marlborough. This complemented copies of private letters between Sarah Churchill and Queen Anne, and Sarah's memoirs**, which Deborah discovered at the Library. These memoirs revealed the female relationship triangle at the heart of Queen Anne's court.

Although Deborah does not write her scripts at the Library, she continues to use its collection to research historical detail for her film, TV, radio and theatre commissions, including a stage play about the 18<sup>th</sup>-century English poet, Alexander Pope.

Source: see Appendix C

<sup>32</sup> Nordicity estimates based on the ratios of employment and GVA to UK domestic film production spending published in British Film Institute (2018), *Screen Business: How Screen Sector Tax Reliefs Power Economic Growth Across the UK*.

#### 4.6 Theatre

66. The survey results indicate that **the Library's 7,240 members** write an estimated 235 theatre scripts on an annual basis (Table 9). This volume of theatre scripts is equivalent to 0.03 scripts per member per year, or 0.81 scripts per playwright per year.

Table 9 Annualised<sup>1</sup> number of theatre scripts written by Library members

	Amount
Raw survey result	38.1
Response rate <sup>2</sup>	93%
Across Library membership <sup>3</sup>	235
Per member	0.03
Per playwright <sup>4</sup>	0.81

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported units of created IP (e.g. the number of theatre scripts) as a percentage of the total number who indicated that they had written a theatre script.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported that they had written a theatre script.

67. According to statistics published in the British Theatre Repertoire Report 2016, and by The Society of London Theatres (SOLT) and UK Theatre, there are approximately 5,000 theatre productions made each year.
- In 2014, British repertoire theatres presented 59,386 performances of 5,072 productions, or an average of 11.7 performances per production.<sup>33</sup>
  - In 2018, there were a total of 62,945 theatre performances in the UK. Applying the average of 11.7 performances per production implies that there were approximately 5,376 theatre productions in the UK in 2018.<sup>34</sup>
  - Considering the statistics for 2014 and 2018, we conclude that there are approximately 5,000 theatre productions in the UK annually.
68. **Assuming a 10% success rate for the Library's playwrights, the Library members account for approximately 0.5% of all plays produced in the UK on an annual basis.**
69. **When the Library's IP share (0.5%) is applied (along with the 35% attribution rate for theatre IP) to the estimated levels of total employment and economic rents generated within the UK's live theatre sector, we find that 20 jobs and £0.3m in economic value can be attributed to the Library (Table 10).**

<sup>33</sup> British Theatre Consortium (2016), *British Theatre Repertoire 2014*, May 2016, p. 3.

<sup>34</sup> Society of London Theatre (2019), 2018 box office figures released by Society of London Theatre and UK Theatre, press release, 1 March 2019.

Table 10 Calculation of the **Library's annualised** share of economic activity in the theatre industry

	Employment	Economic rent
UK live theatre sector [A]	12,300	£196m
Library's IP share [B]	0.5%	0.5%
Library's IP creation attribution rate [C]	35%	35%
<b>Library's share of economic contribution [D]</b>	20	£0.3m

Source: Nordicity estimates based on data from Library member survey (2020), SOLT, UK Theatre, ONS and HMRC

A. See Appendix B

C. See Section 3.3

D = A x B x C



*I have borrowed books from the Library every time I have written a play based on historical events and/or characters. I found the Library particularly helpful in the writing of *The Invention of Love*, *The Coast of Utopia* and *Arcadia*.*

- Sir Tom Stoppard

*I've been a member of The London Library from the day I became a writer. Next only to an available theatre and some good actors, it has been the most indispensable part of my playwriting life.*

- Sir David Hare

## 4.7 Visual arts

70. In the member survey, Library members were asked to report the average annual value of their art commissions or sales, to both domestic and foreign clients. The results indicated that members earned an estimated £9.2m annually from art commissions and sales, or the equivalent of £1,272 per member or £18,175 per artist member (Table 11).

Table 11 Annualised<sup>1</sup> level of visual arts commissions and sales income earned by Library members

	Amount
Raw survey result	£650k
Response rate <sup>2</sup>	40%
Across Library membership <sup>3</sup>	£9,212
Per member	£1,272
Per artist <sup>4</sup>	£18,175

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported income from visual artworks as a percentage of the total number who indicated that they created visual artworks.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported creating visual artworks.

71. Whilst there is no financial, economic or employment data available from ONS specifically for the visual arts industry, we used data for the nearest industry, SIC 90.03 Artistic creation, to derive ratios of the economic rent and the number of jobs generated for each £1m of turnover. These ratios were used to convert the estimate of the total annual value of art commissions and sales (£9.2m) **into estimates of the Library's economic impact**. As part of

the calculation of the Library's economic impact, we also took into account the 28% attribution rate.

72. The results of these calculations are detailed in Table 12 and indicate 20 jobs and £0.8m in economic value (i.e. economic rents) can be attributed to the Library and its role in supporting the creation of visual arts IP.

**Table 12 Calculation of the Library's annualised economic impact within the UK's visual arts industry**

	Employment	Economic rent
<b>Library members' annualised commissions and sales [A]</b>	--	£9.2m
Library attribution rate [B]	28%	28%
Impact ratios [C]	7.9 jobs per £1m	0.33 per £1
<b>Library economic impact [D]</b>	<b>20 jobs</b>	<b>£0.8m</b>

Source: Nordicity estimates based on data from Library member survey (2020), ONS and HMRC

B. See Section 3.3

C. Calculated based on data in Appendix B

D = A x B x C

#### 4.8 Academic research

73. The survey results indicate that the Library's 7,240 members write more than 5,000 academic articles (i.e. articles written for peer-reviewed scholarly journals) on an annual basis (Table 13). This volume of writing is equivalent to 0.69 articles per member per year, or 2.6 articles per academic researcher per year.

**Table 13 Annualised<sup>1</sup> number of academic articles written by Library members**

	Amount
Raw survey result	717
Response rate <sup>2</sup>	82%
Across Library membership <sup>3</sup>	5,002
Per member	0.69
Per academic writer <sup>4</sup>	2.6

Source: Library member survey (2020)

1. Survey results annualised using each member's years of membership.

2. The number of respondents who reported the number of published academic articles as a percentage of the total number who indicated that they had written a published academic article.

3. The raw volume has been grossed-up to account for both the response rate and the overall member survey response rate (17.5%).

4. Based on the number of members who reported having written a published academic article.

74. At the time of writing, authoritative statistics on the annual number of academic articles published by UK-based academics were unavailable. What is more, there is very little existing analysis of the economic impact of academic research across different disciplines – particularly the arts and humanities disciplines that most Library members focus on. For that reason, it was not possible to prepare an estimate of the economic impact of Library members' academic research.

## 4.9 Summary

75. Summing across the various channels of economic impact, we conclude that the Library generates an annualised economic value of £21.3m and 460 jobs – **largely within the UK's creative industries** (Table 14).

Table 14 Summary of The **London Library's annual economic impact**

	Economic value (i.e. economic rents) (£m)	Employment (number of jobs)
Use value	2.51	70
Non-use value	3.00	--
Fiction and non-fiction books IP	2.32	30
Journalism IP	9.42	220
Film and TV IP	2.83	100
Theatre IP	0.34	20
Visual arts IP	0.83	20
Academic research IP	n/a	n/a
Total	21.26	460

Source: Nordicity estimates based on data from Library member survey (2020), IPA/WIPO, Hamborg et al. (2018), Mediatique (2018), BFI, Ofcom, Pact, Mandell (2017), SOLT, UK Theatre, MHM (2019), ONS and HMRC  
 n/a: estimates not available at the time of writing

## 5. Social impact

76. In addition to its economic impact, the Library generates an important social impact, namely through its support of emerging writers, and its promotion of diversity and inclusivity via its subsidised Supported Membership scheme and its partnership with **Jacaranda Book's Twenty in 2020** programme for Black British authors. It also generates a social impact through memberships offered to charitable organisations, its Schools Partnerships Programme, and its half-price Young Person Membership for individuals aged 16 to 29.

### 5.1 Support of emerging writers

77. Launched by the Library in 2019, the Emerging Writers Programme (EWP) provides up to 40 writers at the start of their careers with one year of free Library membership, and a programme of masterclasses, peer support, networking opportunities and guidance in the **use of the Library's resources.**

78. There is certainly an economic-impact angle to the EWP, because it supports the **development of new writers' careers, and some of these writers will go on to be** productive creators of IP – and even prolific and highly successful creators – and thus contribute to the UK economy. Because the EWP participants are selected anonymously by a panel of writers from the print, film, TV and theatre sectors, and because they receive a free one-year membership, the EWP can be considered to have a social impact. The EWP is, in effect, opening up Library membership and the British writing community to cohorts of the population who have historically been under-represented in **the UK's writing profession.**

79. In 2019, individuals from working-class backgrounds accounted for 13% of the workforce **in the UK's publishing industry – less than half of the working-class cohort's share of the** overall UK workforce.<sup>35</sup> Within the creative occupations, individuals with a working-class background accounted for 16% of the workforce.<sup>36</sup> According to research conducted by the RSL, writers from working-class backgrounds; Black, Asian and Minority Ethnic (BAME) writers; and women are significantly under-represented among the highest-earning writers (i.e. writers earning over £30,000 annually from their writing). A blind-selection programme such as the EWP can go some way to addressing this under-representation.

80. The results of a survey of EWP participants indicate that, in general, they place a high value on the importance of the programme to their writing careers and professional development (Figure 5). The most important aspects of the EWP were access to the **Library's collection and its spaces** for writing that it offered.

81. The fact that the EWP brings writers together in a community was also highly valued. For many, working alongside other writers helped them to stay focused, avoid the alienation

<sup>35</sup> Carey, R., Florisson, R., O'Brien, D., Lee, N. (2020), [\*Getting in and getting on Class, participation and job quality in the UK Creative Industries\*](#), p. 12.

<sup>36</sup> Ibid.



that can often accompany their vocation, and realise that by staying committed to their writing they could make a career out of it.



*Being part of a community of writers is really amazing. Feeling that I'm part of something has helped alleviate some of the alienation.*

- EWP participant

*I now have a place to write, a community of writers to belong to and an institution that's supportive of my writing development and success.*

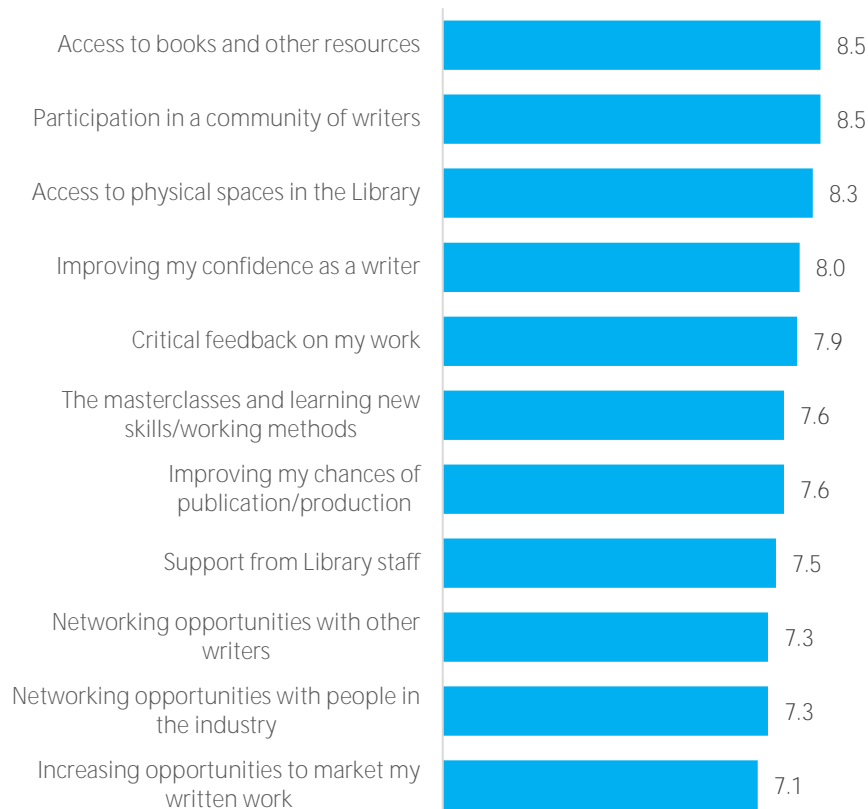
- EWP participant

*Writing alongside other writers was also an excellent way of making sure I was always moving forwards.*

- EWP participant

Figure 5 The importance of the Library to EWP participants' career and professional development

Please consider the below aspects of the programme and the Library, and rate their importance to your career and professional development from 1 to 10



Source: survey of EWP participants  
n=18/38

82. Related to this, many EWP participants highlighted how the programme boosted their confidence as writers. For many, just being selected for the EWP was enough to increase their confidence because it was affirmation of the quality of their work and their abilities. This confidence was also further fostered by working alongside other new writers. The confidence gained by EWP writers could be long-lasting for them, and particularly helpful in networking with people in the publishing industry.



*It really gave me a confidence boost.*

- EWP participant

*The events have helped me to feel more confident as a writer, and better able to navigate networking events.*

- EWP participant

*I feel more confident promoting myself and discussing my work.*

- EWP participant

*It really helped boost my confidence and ambition.*

- EWP participant

*The programme has given me the confidence and conviction to persevere with my writing.*

- EWP participant

83. The EWP was also cited as an important forum for feedback and skills development – although the experience was mixed among participants. Some of the EWP writers really valued the critical feedback they received from their EWP peers and other writers at the Library. However, some participants did not receive any feedback. Meanwhile, the value of the masterclasses offered through the EWP was very much linked to the topic and the quality of the instructor.
84. On a relative basis, the EWP was seen as least important in terms of offering networking opportunities or directly **furthering an author's chances for publication or sales. That being** said, some EWP participants indicated that their involvement in the programme would have a positive effect on their CV and that they even had more overtures from agents due to the programme. Several participants suggested that the EWP could help improve the marketability of their work by launching a literary magazine of their work.
85. Overall, the design of the EWP is providing the basis for expanding the diversity of voices in British writing and giving these new voices the resources they need to create. Importantly, it is giving these new writers the confidence they need to persist with a career in writing.

Amber Medland

Amber first joined the Library in 2017 through the Library's Supported Membership scheme – for half the cost of a gym membership. Making use of the Library “nearly every day when not working”, she has benefitted from the space and support for writing and research, guidance from the librarians, and the insight, inspiration and learning from participating in the occasional event. In its inaugural year of 2020, Amber was selected for the Emerging Writers Programme, which exposed her to working alongside 17 other new writers.

Since joining the Library, Amber has signed a book deal with Faber for her first published novel, *Wild Pets*, due out in 2021. Amber juggles writing, copywriting and a part-time job as well as a bustling homelife with five housemates, and credits the Library with providing the space and time needed to sign her first deal.

Amber praises the Library for its exceptionally knowledgeable staff and their highly curated reading lists as sources of information and inspiration. The Library has also helped Amber develop her confidence as a professional writer, and it helped her see **writing as her ‘job’** for the first time.

Whilst “the building itself is a beautiful and inspiring space that is highly conducive to working”, Amber’s admiration for the Library lies also in “the sense of solidarity and encouragement when surrounded by other writers facing the same challenges and opportunities”.

In her three years as a member, Amber has appreciated an increased diversity amongst both the users and the written works, as “the books being ordered and stocked are becoming more diverse too”. Through her membership, she has been able to access books that she otherwise would not have been able to, due to their prohibitive cost.

The Library has been pivotal to **Amber’s career as a new writer** and she sees herself as a “**member for life**”, renewing her membership after her Supported Membership affordability scheme.

## 5.2 Promoting diversity and inclusivity

86. In addition to the EWP, the Library generates a positive social impact through various initiatives that promote diversity and inclusivity within the writing community and the Library’s own membership. The Library’s two most important initiatives in this regard are Twenty in 2020 and the Supported Membership scheme.

### 5.2.1 Twenty in 2020

87. One of the Library’s key initiatives for promoting greater diversity and inclusivity within publishing and the creative industries is the partnership with the Twenty in 2020 programme. It was first launched by the London-based publisher, Jacaranda Books, in 2019.
88. Through this programme, Jacaranda Books committed to publishing 20 books in 2020 written by Black British authors. In June 2019, the Library joined as a programme partner, and through its participation offered each of the 20 writers a free two-year membership to the Library. These memberships were to last from July 2019 to July 2021 and give the **writers access to the Library’s collection and other resources.**

89. Through an online survey, Twenty in 2020 writers were asked to rate how the Library has impacted on their writing careers and professional development. Although only a small number of writers responded to the survey, the results indicate that for the vast majority of them, the Library was an important source of inspiration for their writing. They also viewed the Library as a valuable source of information for their writing and felt that it helped improve their confidence as a writer. The majority of writers also reported that their Library membership was likely to help them to market their books.



*The London Library has given me a space/resource centre to further my research and writing. Being a member of the library has validated my belief in my writing.*

-Twenty in 2020 participant

90. For Twenty in 2020 writers, the Library has been less important as a source of training, professional development or networking. The Library has also played less of a role in improving their chances of publication or increasing their participation in book festivals.

Figure 6 The impact of The London Library on Twenty in 2020 writers

During your tenure in the Twenty in 2020 programme, how important was The London Library to the following?  
 (Percentage of respondents replying "very important" or "important")



Source: survey of Twenty in 2020 writers  
 n=7/20

”

*To be a part of this awesome group of writers and authors, to be able to have access to The London Library's resources, for Jacaranda to have chosen me as one of the Twenty in 2020 authors, have boosted my confidence as a writer, and made me start thinking that maybe our voices and our stories could be welcomed by mainstream publishers.*

- Twenty in 2020 writer

*The Twenty in 2020 initiative has given me the opportunity to have a volume of my writing published. The British publishing industry lacks diversity and fails to give BAME authors opportunities to have their work published!*

- Twenty in 2020 writer

*The Twenty in 2020 initiative provided me with an opportunity to tell my story, through my experience and narrative. Their guidance and support have steered me and given me more confidence in my voice, and that it should be heard.*

- Twenty in 2020 writer

*Jacaranda, in partnership with The London Library, gave me access to a space I didn't know about.*

- Twenty in 2020 writer

*The London Library affiliation has been a great resource for articles that I would otherwise not have had access to. Twenty in 2020 is ensuring my first poetry collection is published by people who care about my voice, and how the work contributes to my career trajectory.*

- Twenty in 2020 writer

*I was happy to have been given a two-year membership through the Twenty in 2020 initiative. The launch of the initiative in the building was good and I started using the Library after that. I made friends and attended many events that were hosted by the Library. All in all, being a member widened my knowledge and social network.*

- Twenty in 2020 writer

*The first event, the launch, was really exciting because it was the first where Twenty in 2020 authors met each other and came together.*

- Twenty in 2020 writer

*The Twenty in 2020 initiative is instrumental in fulfilling my dream of being a writer.*

- Twenty in 2020 writer

#### Stella Oni

Stella Oni (formerly Stella Ahmadou) is a British-Nigerian author who joined The Library in 2019 through the Twenty in 2020 programme. Much of her writing focuses on crime fiction.

Stella was born in London and raised in Nigeria. With degrees in linguistics, and information systems and technology, she previously worked as a librarian and built a career as a business intelligence analyst. She writes on topics such as blockchain, cryptocurrency and the internet of things. She also maintains a blog, AfricanBritishness.com, where she writes regularly about culture, travel, food and entertainment.

In 2019, Stella was selected as one of 20 Black British authors for the Twenty in 2020 programme. Through the programme, she had her debut novel, *Deadly Sacrifice*, published by Jacaranda Books in September 2020. The book had already been shortlisted for the SI Leeds Literary Prize in 2016.

Alongside *Deadly Sacrifice*, Stella wrote a short story for *Festive Mayhem*, a compilation of holiday-season mystery, crime and suspense stories, written by 10 crime writers of colour and published in October 2020. Another short story, *The Black Widow of Oshogbo*, will be published in an anthology, *Midnight Hour*, by Crooked Lanes in 2021. Stella has also had her writing appear in anthologies such as *Sojourners* edited by Olu Oguibe, and *IC3: The Penguin Book of New Black Writing in Britain* (2000).

**"I am a member of The London Library and love it!"**

Whilst Stella has not necessarily tapped into the Library's collection to pen *Deadly Sacrifice* or her other writing, the Library has been a tremendous inspiration for her and a base from which she could write and expand her professional and social networks. She has also found the librarians and management very approachable and supportive.

**"[I've] started to make new friends with different experiences [at the Library]."**

According to Stella, being accepted on the Twenty in 2020 programme was an incredible boost to her confidence as a writer. And having the Library onboard as partner has added solid support to Jacaranda's initiative.

Stella plans to do more historical writing in the future and hopes to use the Library's online resources and perhaps even return to it as a place to write. In the meantime, she is looking forward to enjoying the recent release of her first novel.

Source: see Appendix C

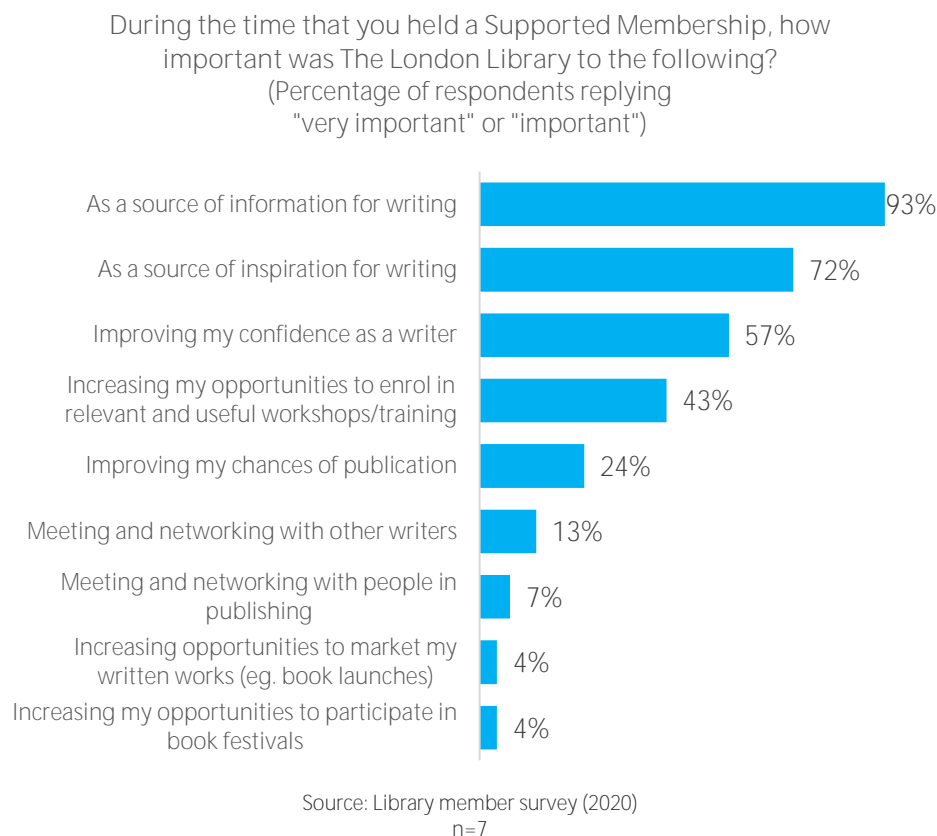
### 5.2.2 Supported Membership

91. Through the Supported Membership scheme, the Library offers subsidised memberships to individuals who are pursuing a course of study, undertaking research, writing a book or who **simply require access to the Library's resources (for reasons compatible with advancing education, learning and knowledge)**. The subsidy typically covers approximately 30% of the standard membership fee, but in exceptional circumstances can be as much as 60% of the standard membership fee.
92. Many members who benefitted from the Supported Membership scheme have gone on to successful writing careers. Joshua Levine went on to work as a historical consultant on the highly acclaimed film *Dunkirk*. His own book, *Operation Fortitude*, is being made into film. He wrote both the book and the screenplay at the Library. Sarah Bakewell went on to write

four published books of non-fiction, and in 2018 won the Yale News Windham-Campbell Prize for non-fiction.<sup>37</sup>

93. The vast majority of Supported members view the Library as an important source of information (Figure 7). The majority also feel that the Library is a source of inspiration for their writing and has a positive impact on their confidence as a writer. Supported members do, however, view the Library as having less of an impact on their marketing, networking and professional development.

Figure 7 The impact of The London Library on Supported Members



<sup>37</sup> Cummings, M. (2018), "Yale awards eight writers \$165,000 Windham-Campbell Prizes", *Yale News*, 7 March.

## 6. Summary of key findings

94. Similar to publicly accessible libraries, the Library generates economic value for its users and non-users. **The fees collected by the Library indicate that the Library's use value is at least £2.5m annually, although it is likely to be even higher. Fees paid by inactive users and philanthropic income together indicate that the Library's non-use value is £3m annually.**
95. In contrast to most public libraries, however, **the Library's membership may be considered** very creative. Two-thirds of members have created at least one type of creative IP during their membership tenure – including fiction and non-fiction books, academic articles, newspaper and magazine articles, film and TV screenplays, theatre scripts and visual artworks. Just under half of members have created two or more of these different types of IP.
96. **Survey data indicates that the Library's 7,240 members are responsible for, on an annualised basis, the creation of over 700 fiction or non-fiction books, more than 15,000 newspaper or magazine articles, more than 230 film or TV screenplays, more than 5,000 academic articles, more than 230 theatre scripts and over £9m worth of art commissions or sales.**
97. Members attribute a significant portion of their IP creation success to their relationship with the Library. First and foremost, **the Library's collection and research resources play an important role in members' creation of IP. For many members creating IP, the Library is** also an important place where they can write productively. And for some members, the Library is even filling the role as a place where writers can work, network and gain valuable feedback.
98. The type of IP created by Library members is the basis upon which the creative industries generate art forms and media enjoyed by readers and audiences around the world. The conversion of this IP into books, articles, films, TV programmes, theatre plays and artworks generates significant employment and economic activity for the UK. Indeed, in 2019, the **UK's creative industries** employed more than 2.1m people, or one of every sixteen, workers in the UK.
99. In addition to the use and non-use value, our analysis of Library members' annualised creative output indicates that a further £15.7m of economic value in IP can be attributed back to the Library. All told, therefore, the Library generated an estimated £21.3m in economic value on an annualised basis, or the equivalent to five **times the Library's** 2019-20 annual operating expenditures of £4.3m. The Library also supports 460 jobs **within the UK's creative and cultural industries** (Table 15).



Table 15 Summary of The **London Library's annual economic impact**

	Economic value (i.e. economic rents) (£m)	Employment (number of jobs)
Use value	2.51	70
Non-use value	3.00	--
Fiction and non-fiction books IP	2.32	30
Journalism IP	9.42	220
Film and TV IP	2.83	100
Theatre IP	0.34	20
Visual artworks IP	0.83	20
Academic articles IP	n/a	n/a
Total	21.26	460

Source: Nordicity estimates based on data from Library member survey (2020), IPA/WIPO, Hamborg et al. (2018), Mediatique (2018), BFI, Ofcom, Pact, Mandell (2017), SOLT, UK Theatre, MHM (2019), ONS and HMRC  
 n/a – estimates not available at the time of writing

100. Alongside the economic impact generated by the Library through its use, non-use and IP creation, the Library is also generating a social impact, namely through the EWP, Twenty in 2020 and the Supported Membership scheme.
101. In 2019, 384 writers and researchers participated in these three programmes. A further 448 people accessed the Library through its Young Person Membership. Most of these participants would not have been able to access the Library without these programmes. For many, these programmes and the Library are having a positive impact on their writing careers. In particular, **they are helping to build participants'** confidence and commitment as writers, whilst also expanding their peer networks.
102. These programmes are opening up opportunities in writing, publishing and the creative industries for groups from socio-economic or ethnic backgrounds that have historically found it particularly challenging to gain a foothold in these fields.
103. The Library is hugely effective at stimulating and facilitating world-class creativity, and is determined to make its collection, spaces and community as accessible as possible to more potential and existing creatives. With increased public and private financial support, the Library will be able to invest in the physical spaces and outreach programmes that will enable it to continue reaching out beyond its traditional cohort of members. In this way, the Library can inspire and support future generations of writers and thinkers, and **continue to contribute to the UK's world-leading position** in research, storytelling and creativity.

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## Appendix A: List of research interviewees

Name	Profession(s)
1. Amber Medland	Novelist
2. Brenda Garrick	Novelist
3. Daisy Goodwin	Novelist, poet, screenwriter and TV producer
4. Sir David Hare	Playwright, screenwriter, theatre director, film director
5. Deborah Davis	Lawyer, historian, journalist, screenwriter, film and TV producer
6. Giles Milton	<b>Non-fiction author, novelist, children's author</b>
7. Jack Shenker	Journalist, non-fiction author
8. Jonathan Putnam	Novelist
9. Josh Levine	Historian, non-fiction writer, screenwriter, actor, barrister
10. Lucy Steeds	Novelist
11. Mandy Rabin	Novelist
12. Mihir Bose	Journalist
13. Stella Ahmadou	Novelist
14. Stephen Ongpin	Art dealer
15. Sue Prideaux	Art historian, novelist, non-fiction author
16. Suzannah Lipscombe	Historian, academic, author, TV broadcaster, journalist
17. Terri McCarger	School librarian
18. Sir Tom Stoppard	Playwright, screenwriter
19. Victoria Hislop	Novelist
20. William Boyd	Novelist, non-fiction author, screenwriter, playwright
21. William Feaver	Art critic, art curator, artist and lecturer
22. Will Harris	Poet, non-fiction author, journal editor

## Appendix B: Calculation of economic rents

Table A - 1 Calculation of economic rents in creative industries, annualised average, 2014-2018 (real 2018 £m, unless indicated otherwise)

SIC	Industry	Turnover [A]	Operating surplus [B]	Normal operating profit [C]	Excess profit [D]	GVA [E]	Employ- ment costs [F]	Number of employees [G]	Wage premium [H]	Economic rent [I]
58.11	Book publishing	5,255	1,603	426	1,177	2,941	1,338	25,000	618	1,795
58.13	Publishing of newspapers	4,562	882	370	512	2,359	1,478	31,250	646	1,159
58.14	Publishing of journals and periodicals	5,774	1,906	468	1,438	3,618	1,712	38,000	700	2,138
58.13+58.14	Publishing of newspapers, journals and periodicals	10,336	2,788	837	1,951	5,978	3,190	69,250	1,346	3,297
59.1	Film and TV production	24,136	3,345	1,955	1,390	7,702	4,357	102,000	1,637	3,027
90.01	Performing arts	4,511	934	365	569	1,756	822	46,250	0	569
90.02	Support activities to performing arts	1,216	408	98	309	623	215	8,750	0	309
09.01+90.02	Integrated performing arts	5,726	1,342	464	878	2,379	1,037	55,000	0	878
n/a	Live theatre [1]	1,276	300	104	196	623	215	12,300	0	196
90.03	Artistic creation	3,378	1,373	274	1,099	1,910	538	26,750	0	1,099

Source: Nordicity calculations based on data from ONS and HMRC

Notes:

1. The economic data for the live theatre sector was derived by applying the ratios for the 'integrated performing arts' industry to the total live theatre industry turnover of £1,276m reported by UK Theatre for the UK theatre market in 2018.

A: sourced from Annual Business Survey

B = E – F

C = 8.1% x A (b calculated as average profit margin across all non-financial industries)

D = B – C

E sourced from Annual Business Survey

F sourced from Annual Business Survey

G sourced from Business Register and Employment Survey

H = F – (Gx average annual full-time salary)

I = D + H

## Appendix C: Case study sources

Giles Milton	<a href="http://www.gilesmilton.com/home">http://www.gilesmilton.com/home</a>
William Boyd CBE	<a href="http://www.williamboyd.co.uk">www.williamboyd.co.uk</a> <a href="http://www.IMDB.com">www.IMDB.com</a>
Jack Shenker	<a href="http://www.jackshenker.net">www.jackshenker.net</a>
Deborah Davis	<a href="http://www.IMDB.com">www.IMDB.com</a> <a href="https://www.awardsdaily.com/2018/11/05/deborah-davis-talks-to-awards-daily-about-the-favourites-twenty-year-journey-to-the-big-screen/">https://www.awardsdaily.com/2018/11/05/deborah-davis-talks-to-awards-daily-about-the-favourites-twenty-year-journey-to-the-big-screen/</a> <a href="https://www.screendaily.com/features/20-years-in-the-making-the-story-behind-bafta-front-runner-the-favourite/5135627.article">https://www.screendaily.com/features/20-years-in-the-making-the-story-behind-bafta-front-runner-the-favourite/5135627.article</a> <a href="https://www.cotswold-homes.com/news/culture/deborah-davis-the-favourite-interview/">https://www.cotswold-homes.com/news/culture/deborah-davis-the-favourite-interview/</a> <a href="https://www.hollywoodreporter.com/amp/features/favourite-blows-up-metoo-gender-politics-love-triangle-1160665">https://www.hollywoodreporter.com/amp/features/favourite-blows-up-metoo-gender-politics-love-triangle-1160665</a> <a href="https://www.standard.co.uk/go/london/film/the-favourite-oscar-nominated-writer-the-standard-inspired-film-a4058886.html">https://www.standard.co.uk/go/london/film/the-favourite-oscar-nominated-writer-the-standard-inspired-film-a4058886.html</a>
Amber Medland	Interview
Stella Oni	<a href="https://stellaonithewriter.com/">https://stellaonithewriter.com/</a> <a href="https://africanbritishness.com/london-library/">https://africanbritishness.com/london-library/</a> <a href="https://www.sileedsliteraryprize.com/2016-shortlist/">https://www.sileedsliteraryprize.com/2016-shortlist/</a> <a href="https://www.worldcat.org/title/ic3-the-penguin-book-of-new-black-writing-in-britain/oclc/50382063">https://www.worldcat.org/title/ic3-the-penguin-book-of-new-black-writing-in-britain/oclc/50382063</a>

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