2013

Ebook Usage in U.S. Public Libraries

FOURTH ANNUAL SURVEY

RESEARCH
LIBRARYJOURNAL / School Library Journal

Survey of Ebook Usage in U.S. Public Libraries

EXECUTIVE SUMMARY

We've come a long way since 2010, when *Library Journal* inaugurated the annual survey of ebook use in public libraries. At that time, public libraries were responding to the initial stirrings of demand for ebooks and were ramping up their offerings. The iPad had just been released and few foresaw the impact it would have on the way people access and interact with content.

2012 was the big year for public demand for ebooks to increase. As our survey last year discovered, there was an explosion of demand for ebooks from library patrons, and libraries were responding to that demand, even if funding was difficult to come by.

Things have settled down this year. Overall demand has tempered and collections are stabilizing, while circulation continues to rise. As we have noted for the past two surveys, ebooks in libraries have become "the new normal." But, as we inevitably caution, the survey data suggest that it can be a fragile normal. Looking at overall book publishing, ebooks sales have been slowing[1], and ereader sales have been plateauing or declining. Why? Some of the novelty has worn off, and as more ebook readers transitioned from dedicated ereaders to tablet devices, they found they were distracted from solely ebook reading.

How will these trends play out five (or more) years hence? Librarians are bullish on the continued adoption of ebooks, and the data presented in this report's sister study—the *2013 Survey of Ebook Usage in U.S. School Libraries*—suggest that the next generation of readers will continue to straddle both the print and electronic book worlds.

Ebook Collections Grow

In 2013, 89% of libraries indicated that they offer ebooks to users, unchanged from 2012. One-fourth of those that do not currently offer ebooks say they definitely will add them in the next year. As always, the biggest impediment to adding or expanding ebook offerings is money. Still, though, lack of interest in ebooks—especially in rural areas—remains a factor.

% of public libraries *offering ebooks*	*2010*	*2011*	*2012*	*2013*
	72%	82%	89%	89%

> *"Most of our ebook users have been new to the library. We are just now starting to see current library users starting to use ebooks, as often they can get the book much faster than waiting for a print copy. Also, teens' and children's use of ebooks is growing. Most 6th graders will have an iPad this fall in school and we are working with the school system to get them library cards so they can access the ebooks for homework help as well as reading."*

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[1] Neil Irwin, "E-book sales are leveling off. Here's why," *Washington Post*, August 8, 2013, http://www.washingtonpost.com/blogs/wonkblog/wp/2013/08/08/e-book-sales-are-leveling-off-heres-why/.

Although the percentage of libraries offering ebooks has not risen, the size of their ebook collections has swelled. In 2013, the median number of ebooks that public libraries offer was in excess of 7,000 titles, an increase of more than 800% since 2010.

Ebook collections	*2010*	*2011*	*2012*	*2013*
Median # of ebooks	813	1,750	5,080	7,380

Demand Tapers but Remains High

In 2013, 42% of respondents reported a "dramatic increase" in demand for ebooks, down from 79% in 2012. At the same time, 48% reported a "slight" increase in demand, up from 18% last year. Overall, demand is ebbing, but still remains high.

Experienced increased demand for ebooks (Net "Dramatic" and "slight")	*2011*	*2012*	*2013*
% of all public libraries	97%	98%	89%

Circulation Rises

Respondents reported a median circulation of 12,139 ebooks in fiscal year 2012. Median ebook circulation has increased more than four-fold since 2010.

Ebook circulation	*FY 2010*	*FY 2011*	*FY 2012*
Median ebook circulation	2,600	5,000	12,139

The overall change in circulation anticipated for this fiscal year is +38.9%. The data indicates that while ebooks are still growing in popularity, they are not exploding like they were a year or two ago.

Anticipated change in ebook circulation	*2011*	*2012*	*2013*
% change in ebook circulation	+107.9%	+67.1%	+38.9%

Most of public libraries' ebook titles (91%) are accessed one user at a time, rather than simultaneously by multiple users. Just as with print books, libraries allow users to place holds on ebooks, and they purchase additional copies to fulfill holds on high-demand titles. The average holds-to-copy ratio for ebooks is 6:1.

Ebook Collections and Categories

Currently, three-quarters (74%) of public libraries' ebook collections are fiction titles, while 26% are nonfiction titles. Adult titles account for 71% of public libraries' collections, children's ebooks account for 15% and young adult ebooks represent 14%. Public libraries have been expanding their children's and young adult ebook collections and the implementation of the Common Core State Standards in our nation's schools suggests that a greater emphasis on nonfiction titles for children may be stressed going forward.

Last year 4% of public libraries carried original ebook titles, this year that number increased to 15% to satisfy readership demand for titles. (By "original ebook titles" we mean titles published only in ebook form without a complementary print edition, and/or self-published ebooks.)

Douglas County Libraries in Colorado have crafted a unique ebook purchasing model, turning to groups of "indie" publishers through which ebooks can be purchased at a discount—and can be actually owned by the library. The Douglas County model is starting to gain traction, and it will be interesting to track its progress.

Still, self-published electronic books are available much less often than self-published print books, which are carried by 61% of public libraries[2].

> *"It seems like the independent ebook market is burgeoning right now and we'd be interested, but aren't prepared or staffed to run our own platform, so we'd need someone else to host and maintain for us to delve into this realm. But, we're certainly not opposed to it."*

Obstacles Persist

The most serious hindrances to the public's use of ebooks have to do with lack of popular titles available and the limited numbers of ebooks overall.

> *"The primary and overwhelming concern/problem is being unable to purchase popular ebook titles for our patrons because publishers have not made them available through OverDrive. We have the money to spend, they just won't provide titles for our library to buy!"*

At the time of the survey fielding, half of the big six publishers did not allow their ebooks to be licensed by public libraries. Since then, Penguin announced they will begin licensing their ebooks to OverDrive and Baker & Taylor's Axis 360, thereby relieving some of the tension.

Another obstacle to library ebook usage, noted by 71% of libraries, was the perpetual "ease of use" issue. Nearly half (43%) of public librarians hear patrons voice the concern, "I need help downloading ebooks to my device," on a daily basis.

Ebook Budgets Are Rising, but More Slowly

In the current (2013) fiscal year, public libraries spent on average $105,938 (median $12,890) on ebooks. We project total spending on ebooks by U.S. public libraries to be approximately $92 million in the current fiscal year. Over the past four years, ebooks have grown from just under 2% of public libraries' materials budgets to more than 6%. Libraries expect ebook spending as a percentage of their total materials budget to double in five years' time (2018).

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[2] Library Journal 2012 Public Library Materials Survey.

Population served	Ebook spending as a % of total materials budget (median %)				
	2010	*2011*	*2012*	*2013*	*2018*
All public libraries	1.7%	3.5%	4.7%	6.1%	13.2%
< 25,000	1.5%	1.9%	3.9%	3.9%	11.8%
25,000–99,000	1.8%	3.8%	4.7%	6.4%	13.2%
100,000–499,000	1.7%	3.5%	6.9%	7.4%	14.1%
500,000+	1.9%	4.0%	6.9%	6.5%	14.3%

A challenge for libraries lies in expanding ebook collections while maintaining robust print collections and other services. Sixty-three percent of libraries are reallocating funding from elsewhere in their materials budgets to pay for ebooks, one-half of whom identify the reallocation coming from the print budget. Seventeen percent reallocate from the reference budget, and 8% say they take a little from all areas to pay for ebooks.

Membership in a consortium is one way that public libraries can gain access to a larger breadth of ebook titles. Just about two-thirds (64%) of libraries said they currently were consortia members. Of those public libraries that are part of a consortium, 49% also buy ebooks independently, purchasing an average of 1,803 ebooks (median 420) outside of the consortium.

> *"I feel like we are serving two communities—one that really still wants print materials and one that really wants lots of ebooks. While I love ebooks, I don't think enough books are available for libraries to purchase to make a good collection of just ebooks."*

Purchasing Terms

The purchasing terms for ebooks are changing. In 2013, the majority of libraries—62%—say they "license with a set number of circs," up from 24% last year. "Purchase with perpetual access" was cited by 58%, up from 48%. Thirty-eight percent of libraries purchase "subscriptions," just about unchanged from last year (37%). Four out of ten (39%) public libraries have implemented patron-driven acquisition, while a further 27% are considering it.

Ebooks and Ereaders

The popularity of dedicated ereaders with patrons is still high, but the research shows tablets have quickly risen in attractiveness and are projected to become the device of choice for readers.

Preferred ereading devices	2010	2011	2012	2013
Dedicated ebook reader (e.g., Nook, Kindle, Sony Reader)	52%	85%	90%	86%
Tablet (e.g., iPad, Kindle Fire)*	n/a	n/a	66%	82%
Smartphone or other mobile device*	36%	61%	41%	51%
Personal laptop/Computer/Netbook	61%	53%	33%	33%
Library computer	16%	4%	2%	4%

*2010, 2011 Tablet, smartphone listed as "other portable device"

Only two out of five libraries have ereaders on hand for patrons' use, most often the mid to small size libraries. Up until now, libraries have been more likely to purchase Kindles and Nooks, rather than more expensive tablets. However, tablets are gaining ground fast; more libraries plan to add tablets than dedicated ereaders in the coming year. The devices offered are generally intended for adult use. However, of those libraries that offer devices, over half also provide some for teen use and a third allow for children's use.

> *"Only adults can check out ereaders, laptops, and tablets but many adults check them out and then let their children use them."*

Conclusions

Ereading continues to grow, although evidence in this study and elsewhere suggests it may be plateauing. General economic conditions and stubbornly high unemployment may be keeping adult consumers from acquiring ereaders or developing an interest in ebooks. But there's no doubt that children growing up in an electronic world will be as used to reading on devices as on paper.

INTRODUCTION

About the 2013 *Library Journal* Ebook Survey

Welcome to the fourth *Library Journal* survey of electronic book usage in U.S. public libraries. It's hard to imagine that three years have passed since we inaugurated this annual look at how ebooks are being adopted by public libraries. Just looking at the technological changes is dizzying: in 2010, just a few months before we launched our first survey, Apple introduced the iPad, and it wasn't entirely certain what this meant for ebooks, let alone ebooks in libraries. In fact, most ebooks were still being read on desktop and laptop computers. Now, in 2013, people are reading on electronic devices everywhere, and dedicated ebook readers like the Kindle and the Nook have morphed into tablet-like devices that do more than just provide a platform to read books.

As the public has become more comfortable with ereading devices, libraries have followed suit, and the data in our present report show that while ebook penetration is slowing, that's only because ebooks may be coming close to reaching almost universal adoption by public libraries. This is not to say that ebook collections do not warrant further study. As we will see throughout this report, there are still some emerging trends and gray areas with regard to ebooks and public libraries. And trends can change just as quickly as technology.

Academic libraries have practically attained universal ebook adoption, and the bumps associated with providing ebooks in that space have been generally smoothed over; thus we have discontinued our look at ebook penetration into academic libraries. Public libraries are not nearly at that point yet—and school libraries (covered in the companion report to the present one) lag behind both— but issues relating to availability of titles and navigating ereading devices abound. So the present report is one of two that looks at the current state of ebooks and their place in libraries. Our most recent survey reprises many questions from previous years' surveys, allowing us to track long-term trends more effectively, as we now have three or four data points to consider. We tweaked some other questions based on responses to past surveys or to better reflect changes in the market, so some data points may not be entirely consistent with past responses. And, of course, we added some brand new questions this year.

Some new questions involving the comments and concerns librarians hear from patrons (see Chapter 3) indicate that libraries, publishers, and vendors still have a ways to go to make ebooks as user-friendly as possible, and the public is noticing. What librarians perceive as an overt hostility toward libraries on the part of ebook publishers endures.

We invited survey respondents to answer open-ended questions that asked about public libraries' experience with ebooks in general, as well as how libraries' manage the distribution of ereading devices to users. The answers, as usual, tended to skew toward those who experienced problems or had complaints, but

generally—and more so than in previous surveys—reflected a very high comfort level with, and even enthusiasm for, ebooks, both among library staff and among library patrons. As always, these verbatim responses are a useful lens through which to view the quantitative results of our survey. A selection of these responses can be found at the ends of Chapters 2, 3, 4, and 5. We also sprinkled a few in the main commentary.

The methodology and questionnaire are included in the Appendix.

How This Report Is Organized

If you have used past versions of our ebook usage surveys, much of what follows in the present report will seem familiar, although we have added some new "features" this year to aid readers in making the best use of the data.

Data Presentation

The bulk of each chapter provides top-level survey results in chart form—in essence, the "all responses" results, or what all libraries surveyed said about a specific question. This gives an overall idea of the prevailing attitude.

In those cases where we have calculated averages, such as "average number of ebooks available," "average number of ereaders available," or "average amount spend on ebooks," we provide both a mean and a median. A *mean* is a simple average, or "the sum of a collection of numbers divided by the number of numbers in the collection."[3] A *median* is "the numerical value separating the higher half of a data sample, a population, or a probability distribution, from the lower half."[4] Medians are more useful than means when looking at datasets with outliers—that is, figures that are anomalously high or anomalously low.[5] For some of the questions in this survey, there were very large outliers that skewed mean figures, so looking at median values gives us a better idea of what the reality is.

Each chart is followed by a corresponding table that breaks down the survey responses by population served and geographical region. We segmented the public libraries by population served—or, roughly, "small" (fewer than 25,000 users), "mid-size" (25,000–99,000), "large" (100,000–499,999), and "very large" (greater than 500,000). Different size libraries have varying attitudes and behaviors—a public library that serves a large urban population will have a different set of needs and be subject to different forces than a public library that serves a small rural community. We have called out in commentary where some figures in these cross-tabulations caught our attention, but readers who are looking for more granularity will find much of value in these tables.

For geographical region, we grouped our survey sample into four general regions: Northeast, Midwest, West, and South (see Chapter 1 for which specific states are

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[3] https://en.wikipedia.org/wiki/Arithmetic_mean.
[4] https://en.wikipedia.org/wiki/Median.
[5] A classic example of the problem of outliers is if a group of librarians was gathered in a bar. Calculate the average annual income. Suddenly, Bill Gates walks in. Now re-calculate the average annual income. Did everyone just get a massive raise, or did one outlier skew the average upward?

included in these regions). Geographical data can be helpful for vendors, publishers, or other companies seeking to identify where to focus sales, marketing, or even customer support efforts.

In this survey, we eliminated the cross-tabulations by materials budget we had included in prior surveys, not just to keep the presentation of the data simple, but also because we have found over the years that those data points didn't really tell us anything novel (i.e., libraries with larger budgets spend more on ebooks and ereaders). In addition, we found that budget trends, in general, mirrored population-served trends.

In this report we sought to add a greater historical perspective, so for questions that have appeared in at least three of the past four surveys, we have provided a "time series" chart to track trends over time.

Chapter Structure

Chapter 1 offers a demographic profile of the libraries and individuals who responded to our survey.

Chapter 2 looks at ebook "supply and demand." How many libraries offer ebooks? What is preventing libraries from amassing ebook collections? How has ebook circulation changed?

Chapter 3 looks at ebook collections. What ebook categories and genres are most in demand from users? What problems do library patrons have in accessing those collections? How do libraries promote their ebook offerings?

Chapter 4 looks at budgets and purchasing terms. How much do public libraries spend on ebooks? Are ebooks taking a greater percentage of the budget pie? Are libraries cutting elsewhere to pay for them? On what purchasing terms do libraries buy?

Chapter 5 looks at ereading devices. What are the most popular hardware devices on which users read ebooks? Do libraries circulate hardware devices to patrons? Which ones? What challenges do libraries encounter when circulating ereaders?

The Appendix provides the questionnaire and methodology for this year's survey.

At the end of each chapter, we have provided select responses to our write-in comments questions.

For More Information

For questions or comments regarding this study, please contact our research manager, Laura Girmscheid by phone (646) 380-0719 or by e-mail at lgirmscheid@mediasourceinc.com.

1. PROFILE OF RESPONDENTS

Who answered our questions? This section provides a basic demographic profile of the libraries that responded to our 2013 survey.

Type of Library

As the chart below shows, 44% of the public libraries responding to this questionnaire identified themselves as a "stand-alone, single-branch library," while 27% identified themselves as "main branch of a multi-branch system/district." Eleven percent responded from a "branch of a multi-branch system/district," and 14% from a "library system or district administrative office."

Figure 1. Which of the following best describes your library?
% of public libraries, 2013
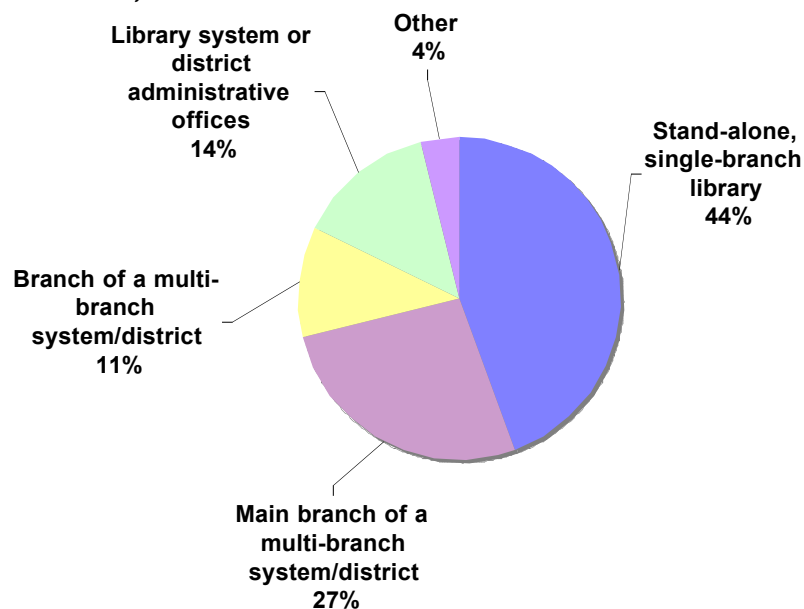
The table below breaks the data down by population served and geographic region.

Table 1. Which of the following best describes your library?
% of public libraries by geographic region, 2013

	Population Served				*Geographical Region*			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Stand-alone, single-branch library	82%	49%	6%	3%	53%	55%	41%	29%
Main branch of a multi-branch system/district	3%	28%	48%	37%	23%	17%	24%	42%
Branch of a multi-branch system/district	11%	10%	11%	9%	10%	10%	11%	12%
Library system or district administrative offices	1%	7%	30%	51%	11%	13%	19%	14%
Other	3%	5%	5%	0%	3%	6%	5%	3%

Population Served

Public libraries responding to our survey serve an average (mean) population of 147,245 (median 59,636).

Figure 2. What size is the population served by your library?
% of public libraries, 2013
Mean: 147,245/Median: 59,636
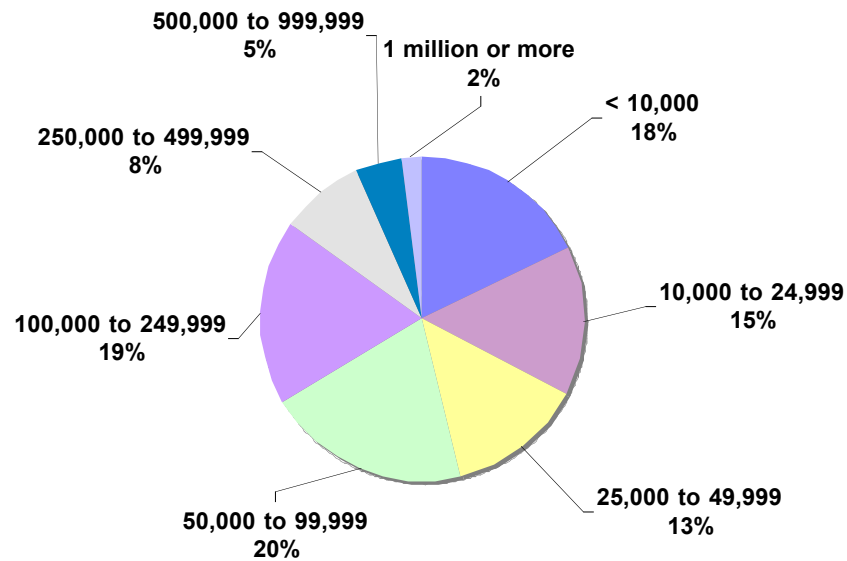
Table 2. What size is the population served by your library?
% of public libraries by geographic region, 2013

	Geographical Region			
	Midwest	*North-east*	*West*	*South*
< 10,000	21%	21%	21%	9%
10,000 to 24,999	17%	25%	4%	13%
25,000 to 49,999	16%	25%	9%	5%
50,000 to 99,999	25%	15%	20%	17%
100,000 to 249,999	7%	8%	24%	37%
250,000 to 499,999	8%	3%	11%	9%
500,000 to 999,999	4%	1%	7%	7%
1 million or more	1%	1%	3%	3%
Mean	114,585	71,477	199,582	203,269
Median	43,784	28,148	89,741	122,358

Urban, Suburban, or Rural

About one-half (47%) of the libraries included in this year's survey are located in suburban locations, 35% are in rural locations, and 25% are in urban locations. (Numbers add to more than 100%, as district offices and multi-branch libraries may serve more than one type of location.)

Figure 3. How would you describe your library's location?
% of public libraries, 2013
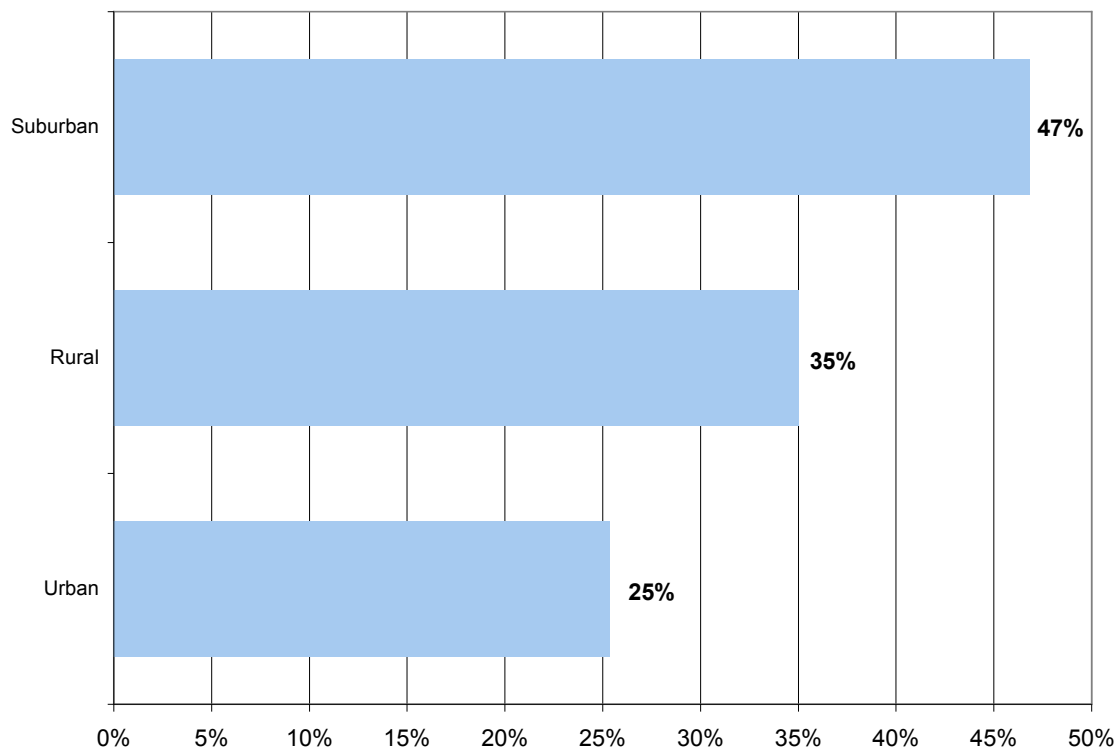
The following table breaks the public/private data down by population served and geographic region.

Table 3. How would you describe your library's location?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Urban	5%	25%	38%	69%	16%	21%	32%	35%
Suburban	23%	63%	53%	43%	54%	49%	37%	44%
Rural	73%	19%	22%	3%	42%	32%	34%	30%

Library Location

The following designates the geographical location of the libraries responding to our survey, based on U.S. Census Bureau regional classifications:

- New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

- Mid-Atlantic: New Jersey, New York, Pennsylvania

- South Atlantic: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia, District of Columbia

- East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin

- West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota

- East South Central: Alabama, Kentucky, Mississippi, Tennessee

- West South Central: Arkansas, Louisiana, Oklahoma, Texas

- Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming

- Pacific: Alaska, California, Hawaii, Oregon, Washington

These nine regions are also grouped into four larger U.S. regions:

- Northeast: New England and Mid-Atlantic

- Midwest: East North Central and West North Central

- South: South Atlantic, East South Central and West South Central

- West: Mountain and Pacific

Figure 4. In which region of the country is your library located?
% of public libraries, 2013
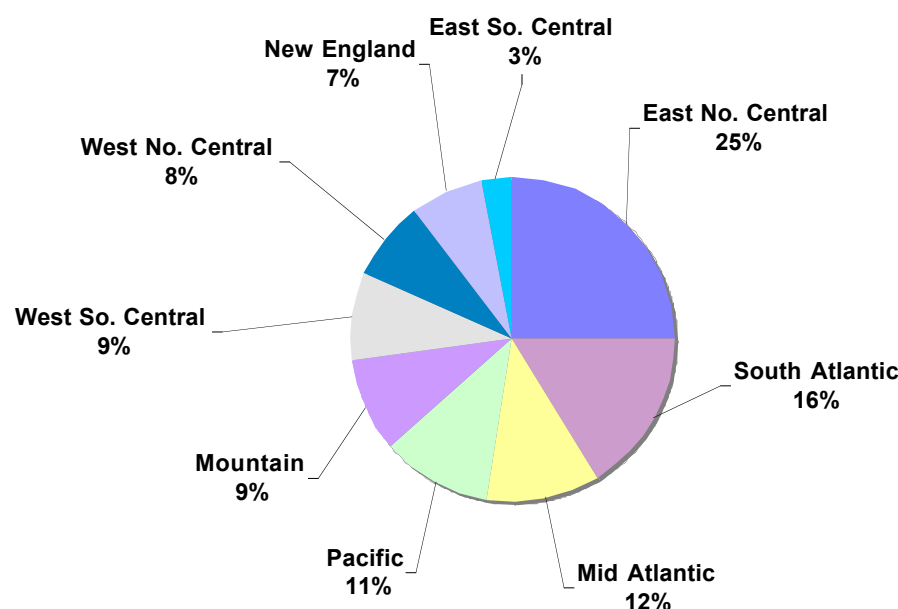
Looking at the four major geographical divisions, we see that our sample skewed a little heavily toward the Midwest, and away from the Northeast.

MIDWEST	33%
NORTHEAST	19%
WEST	20%
SOUTH	28%

Table 4. In which region of the country is your library located?
% of public libraries by population served

	Population Served			
	< 25,000	25,000-99,000	100,000-499,000	500,000+
East No. Central	27%	35%	9%	20%
South Atlantic	5%	9%	31%	23%
Mid Atlantic	16%	12%	8%	3%
Pacific	3%	6%	23%	17%
Mountain	14%	11%	3%	14%
West So. Central	10%	6%	12%	9%
West No. Central	12%	6%	12%	3%
New England	10%	13%	0%	3%
East So. Central	3%	2%	2%	9%
MIDWEST	39%	41%	22%	23%
NORTHEAST	26%	24%	8%	6%
WEST	18%	17%	26%	31%
SOUTH	18%	18%	45%	40%

Respondent Job Title/Ebook Recommendation Authority

How involved are our survey respondents in ebook purchasing and recommendation decisions in their libraries? In other words, how knowledgeable were they about the questions we asked?

Job Title

One-third (34%) of the respondents to our survey gave their job title as "library director/assistant library director," with 13% identifying themselves as "collection development/materials section librarian." The remainder included assorted librarian and managerial positions.

Figure 5. Which of the following comes closest to your job title?
% of public libraries, 2013

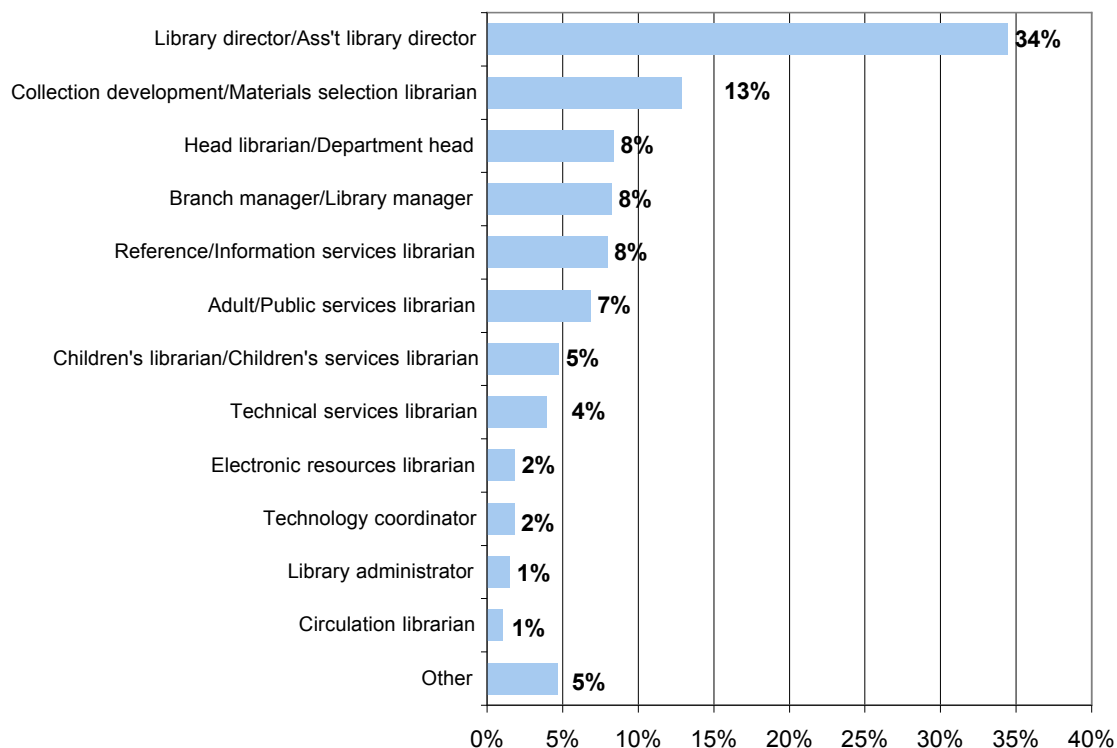| Job Title	Percentage
Library director/Ass't library director	34%
Collection development/Materials selection librarian	13%
Head librarian/Department head	8%
Branch manager/Library manager	8%
Reference/Information services librarian	8%
Adult/Public services librarian	7%
Children's librarian/Children's services librarian	5%
Technical services librarian	4%
Electronic resources librarian	2%
Technology coordinator	2%
Library administrator	1%
Circulation librarian	1%
Other	5%

Table 5. Which of the following comes closest to your job title?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Library director/Ass't library director	58%	27%	25%	9%	30%	48%	28%	35%
Collection development/Materials selection librarian	1%	6%	26%	49%	14%	7%	16%	13%
Head librarian/Department head	7%	7%	12%	3%	5%	9%	8%	12%
Branch manager/Library manager	8%	8%	6%	14%	11%	6%	12%	4%
Reference/Information services librarian	4%	15%	3%	9%	7%	7%	8%	10%
Adult/Public services librarian	3%	15%	5%	3%	11%	7%	7%	1%
Children's librarian/Children's services librarian	8%	3%	3%	0%	6%	7%	1%	3%
Technical services librarian	3%	3%	6%	0%	5%	3%	6%	2%
Electronic resources librarian	1%	1%	3%	6%	1%	1%	1%	4%
Technology coordinator	1%	3%	2%	0%	2%	0%	1%	3%
Library administrator	1%	0%	5%	3%	2%	0%	0%	3%
Circulation librarian	0%	2%	0%	3%	0%	4%	1%	0%
Other	5%	6%	3%	3%	4%	1%	7%	7%

Role in Ebook Decisions

Almost three-fourths (72%) of our survey respondents do indeed have a role in making ebook purchasing recommendations and decisions.

Figure 6. Are you involved in the recommendation/purchasing process of ebooks for your library?
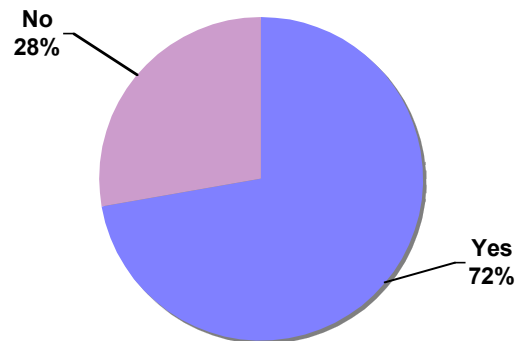*% of public libraries, 2013*

Table 6. Do you have a role in making purchasing recommendations/decisions for ebooks in your school?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	64%	66%	87%	71%	70%	63%	70%	83%
No	36%	34%	13%	29%	30%	37%	30%	17%

Onward

Our sample represents an accurate distribution of public libraries throughout the U.S. The respondent profile of the present survey is consistent with that of our past surveys, facilitating comparisons and the identification of trends. Our survey also includes a very large percentage of ebook decision makers.

2. EBOOK SUPPLY AND DEMAND

This chapter looks at the number of ebooks held by the public libraries that responded to our survey, as well ebook circulation, ebook demand, access to ebooks and data about ebook usage.

Offer Ebooks

In the most recent survey of public libraries, nearly nine out of ten respondents (89%) indicated that they offer ebooks to library users. In our first survey in 2010, less than three-fourths of libraries offered ebooks (see Figure 8).

Figure 7. Does your library offer ebooks?
% of public libraries, 2013
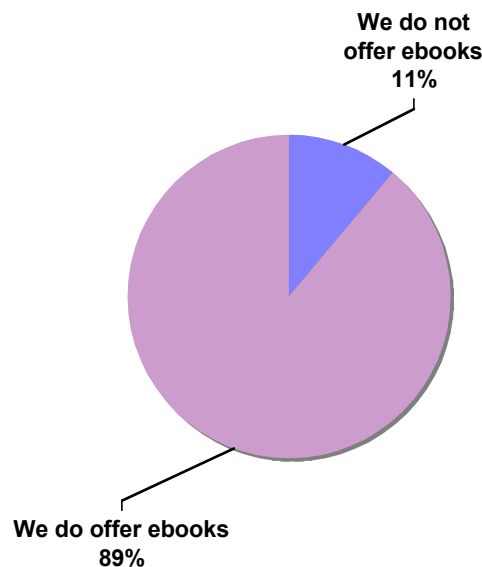
The following table breaks these data down by population served and geographic region. As is typical in this survey, those libraries that serve smaller populations tend to be lagging slightly behind those that serve larger populations. Larger libraries tend to have correspondingly larger budgets, a factor to consider when looking at many other questions in this survey.

Table 7. Does your library offer ebooks?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We do not offer ebooks	27%	5%	5%	0%	10%	7%	13%	14%
We do offer ebooks	73%	95%	95%	100%	90%	93%	87%	86%

Many of the questions in this survey were asked in at least three of the four surveys conducted thus far, giving us the opportunity to plot changes over time. Figure 8 shows the extent to which public libraries have increasingly been making ebooks available to their users.

Since 2010, libraries that serve the smallest populations have lagged behind larger libraries—and, in fact, a slightly higher percentage of our 2013 respondents in the under-25,000 range said they did not offer ebooks than in our 2012 survey. It's tempting—and not completely inaccurate—to attribute this to lack of funds, but as we will see in the next question, under-25,000 libraries that did not offer ebooks were the only ones (17%) who reported "no demand for ebooks." As many of the write-in comments reiterate, rural areas tend to be less technology-centric than more populated areas and demand for ebooks is lower in those communities.

Figure 8. Public libraries that offer ebooks
% of public libraries by population served, 2010–2013
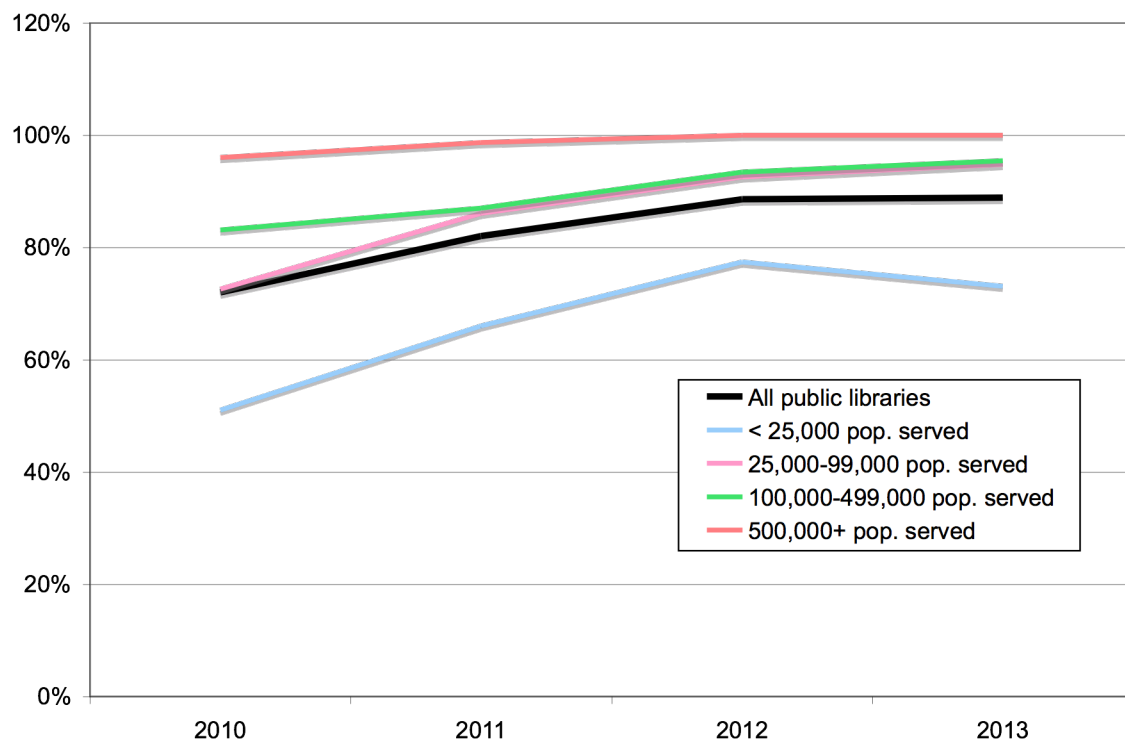
Libraries Without Ebooks

Of those libraries that do not offer any ebooks (11% of all respondents), the top-cited reason is "no money for ebooks," selected by 54% of public library respondents. "Waiting to see what the best platform will be" is a distant second at 23%, with "we are in the process of adding ebooks" selected by 18%.

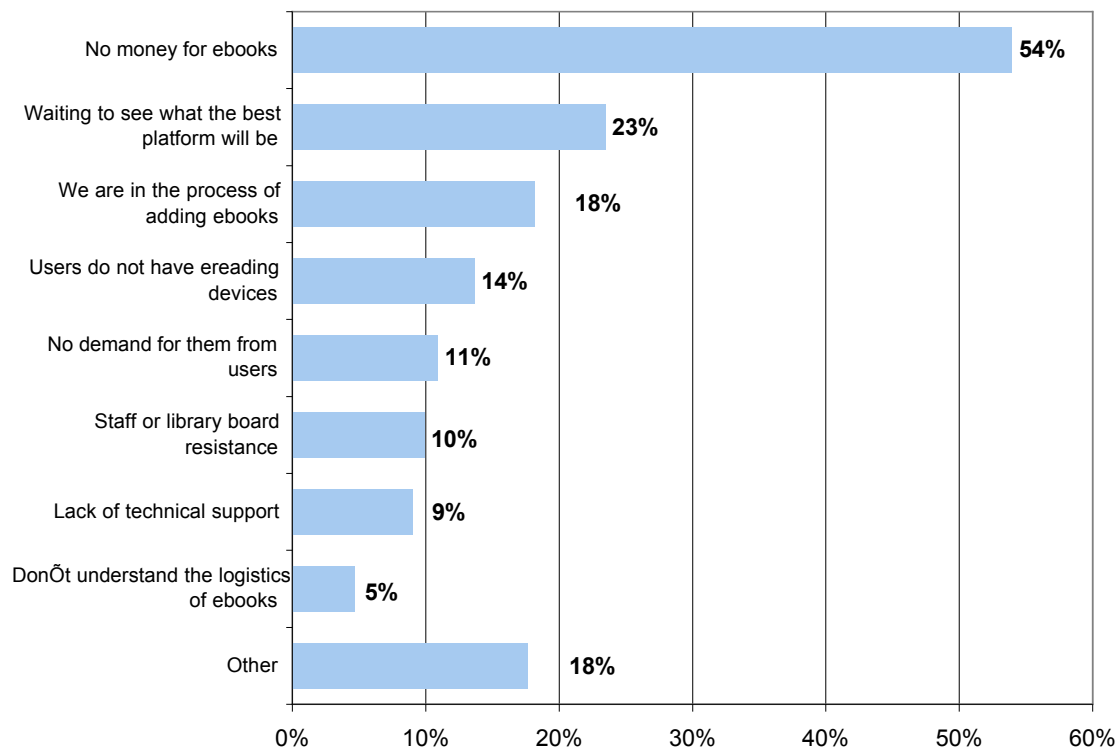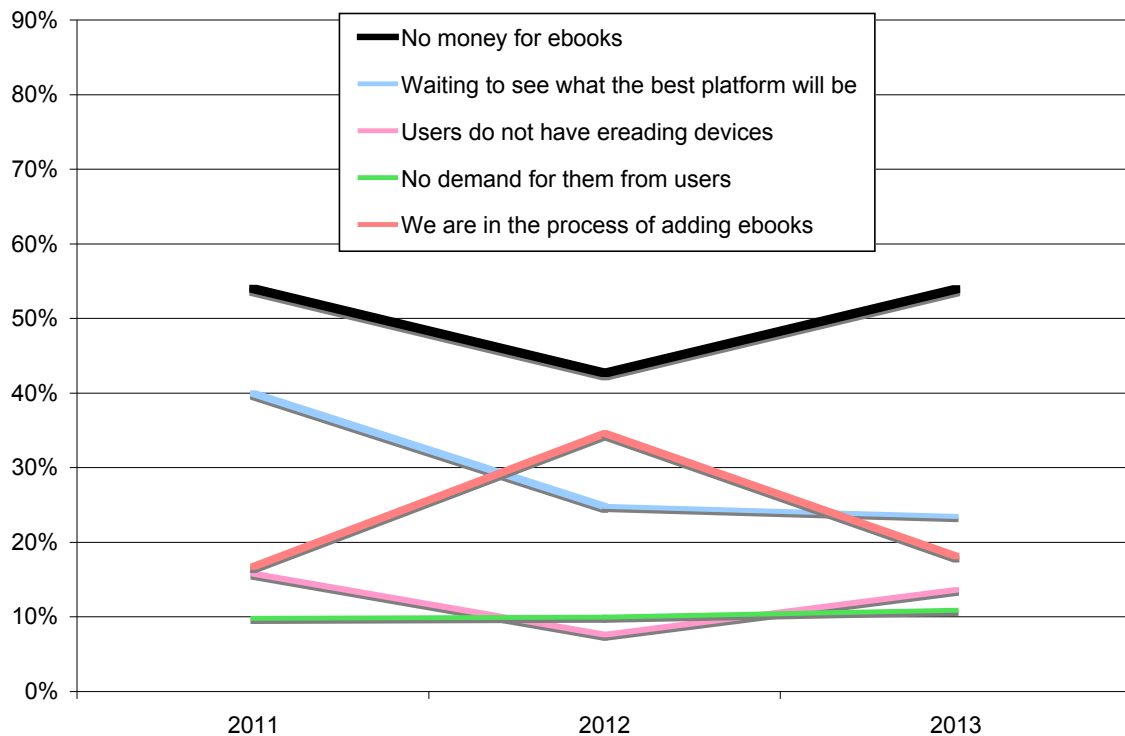**Figure 9. Why doesn't your library offer ebooks?**
% of public libraries, 2013

Table 8. Why doesn't your library offer ebooks?
% of public libraries that do not offer ebooks, by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No money for ebooks	50%	60%	67%	0%	37%	20%	86%	61%
Waiting to see what the best platform will be	24%	20%	33%	0%	26%	25%	14%	24%
Users do not have ereading devices	14%	0%	33%	0%	11%	0%	21%	17%
No demand for them from users	17%	0%	0%	0%	11%	0%	27%	4%
Staff or library board resistance	7%	0%	33%	0%	11%	0%	0%	20%
Lack of technical support	7%	0%	33%	0%	5%	0%	14%	12%
Don't understand the logistics of ebooks	7%	0%	0%	0%	11%	0%	7%	0%
Other	10%	40%	33%	0%	9%	42%	7%	24%
We are in the process of adding ebooks	14%	20%	33%	0%	26%	33%	0%	20%

Looking back at the past three years, the data are a bit less robust, given how small the respondent base to this question has generally been. Not unexpectedly, "no money for ebooks" has remained fairly stable as the top reason for not adding ebooks. "No demand for them from users" has remained stable at 10% of libraries that do not offer ebooks.

Figure 10. Why doesn't your library offer ebooks?
% of public libraries, 2011–2013

Ebook Plans

Of the 11% of public libraries that do not offer ebooks, only 8% have categorically ruled out ever buying ebooks. On the other hand, 25% say they definitely will be adding ebooks to their collections, while 38% may, but haven't yet made it a priority.

Figure 11. What are your library's plans for ebook purchases in the next two years?
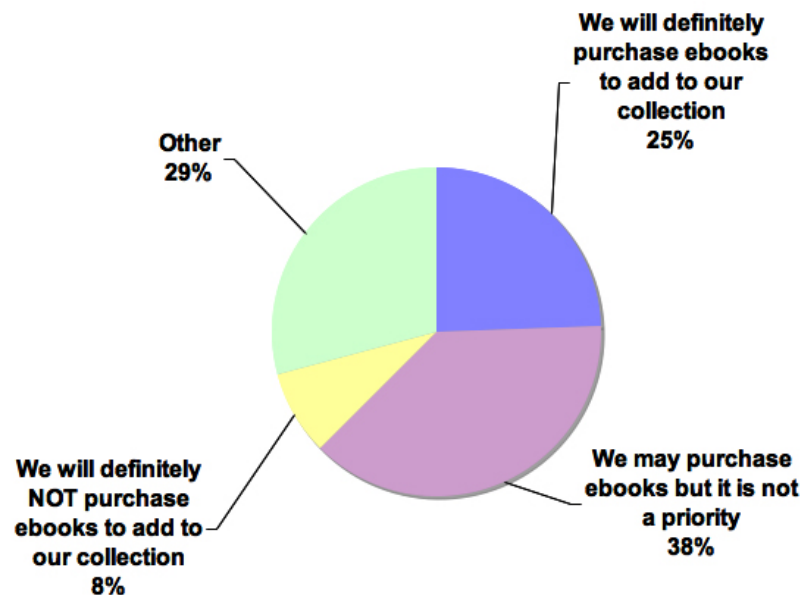*% of public libraries, 2013*

Table 9. What are your library's plans for ebook purchases in the next two years?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We will definitely purchase ebooks to add to our collection	26%	20%	0%	0%	20%	20%	7%	40%
We may purchase ebooks but it is not a priority	38%	40%	50%	0%	42%	13%	53%	35%
We will definitely NOT purchase ebooks to add to our collection	12%	0%	0%	0%	16%	0%	14%	0%
Other	24%	40%	50%	0%	22%	67%	26%	25%

The decline in the number of libraries "definitely" planning to add ebooks in the near future is due in large part to the fact that they have already added them, as is the case in the 100,000–499,000 population served category.

Figure 12. Will _definitely_ purchase ebooks to add to our collection
% of public libraries by population served, 2011–2013
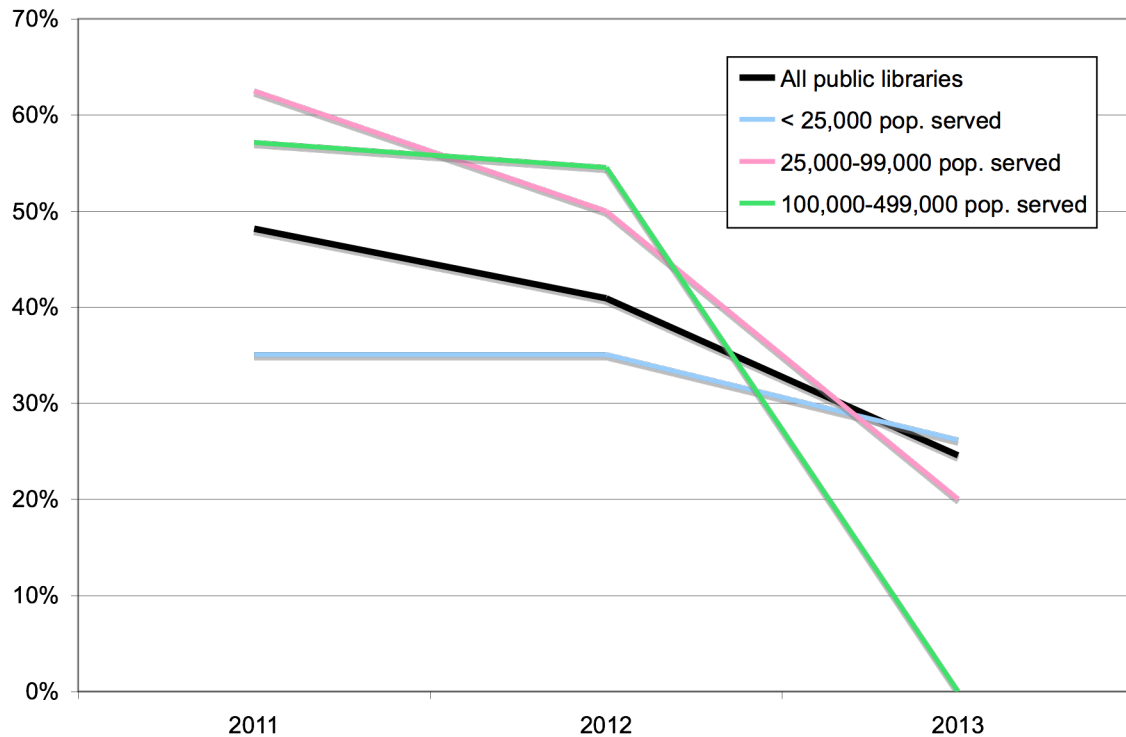
Note: 500,000+ population-served libraries omitted as they were at 0% all three years.

How Long Libraries Have Offered Ebooks

As of 2013, public libraries have been offering ebooks to users, on average, for 2.8 years, up very slightly from 2.5 years reported in last year's survey. Twenty-eight percent of 2013 respondents said that they have carried ebooks for over four years (up from 17% last year), while only 9% have offered ebooks for less than one year (down from 17% last year). As these surveys go on, we would expect to see the lower bars growing, and the upper bars shrinking.

Figure 13. How long has your library offered access to ebooks?
% of public libraries, 2012–2013
<u>**Mean (2013): 2.8 years**</u>
<u>**Mean (2012): 2.5 years**</u>
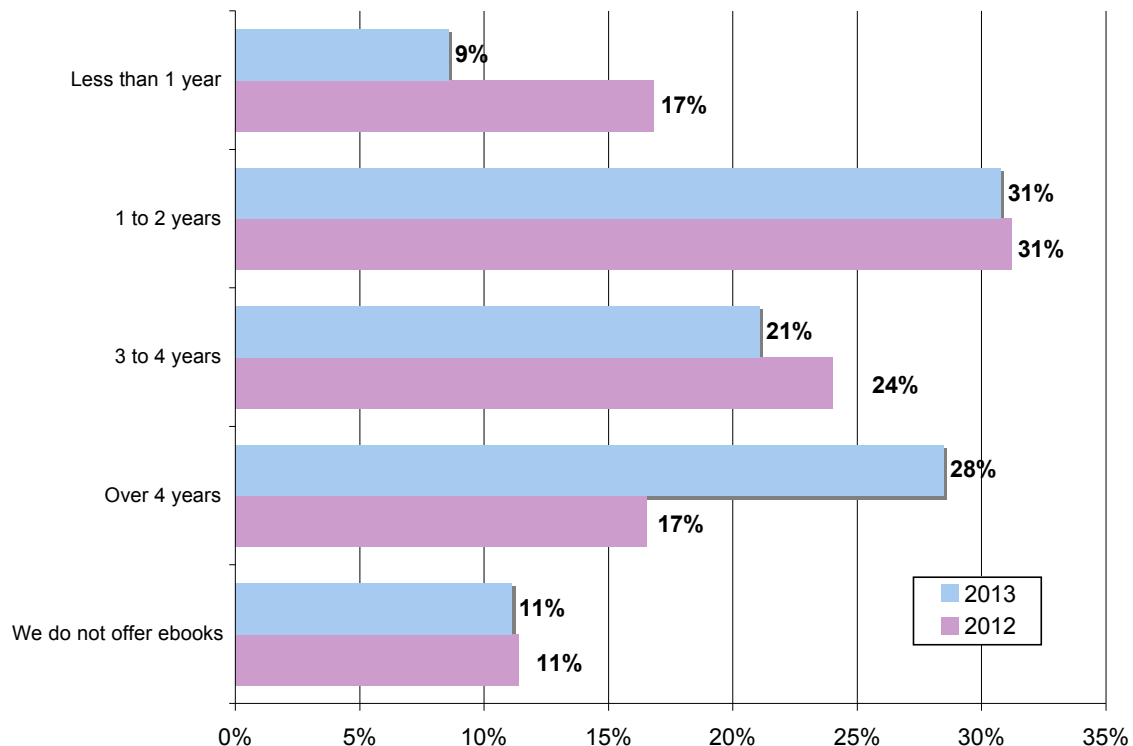
The very largest libraries have offered ebooks for almost four years on average, compared to just over two years for smaller libraries.

Table 10. How long has your library offered access to ebooks?
% of public libraries by population served and geographic region, 2012–2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2013								
We do not offer ebooks	27%	5%	5%	0%	10%	7%	13%	14%
Less than 1 year	12%	6%	11%	0%	2%	8%	11%	14%
1 to 2 years	31%	35%	29%	14%	27%	40%	24%	33%
3 to 4 years	21%	25%	15%	17%	24%	28%	18%	16%
Over 4 years	10%	28%	41%	69%	38%	17%	34%	22%
Mean # years	2.3	2.9	3.0	3.9	3.2	2.6	3.0	2.5
2012								
We do not offer ebooks	23%	7%	7%	0%	8%	7%	14%	16%
Less than 1 year	21%	18%	14%	3%	15%	16%	16%	21%
1 to 2 years	33%	33%	28%	22%	32%	35%	32%	27%
3 to 4 years	19%	28%	24%	32%	26%	33%	20%	19%
4 years or more	4%	14%	28%	42%	19%	9%	18%	17%
Mean # years	1.9	2.4	2.8	3.5	2.6	2.4	2.5	2.4

How Many Ebooks?

Outliers in our survey—typically the largest libraries—tend to skew our average figures, so while we calculate the mean number of ebooks to which public libraries have access to be 15,310, the median number is 7,380, which we feel is a more accurate, projectable figure.

Figure 14. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?
% of public libraries, 2013
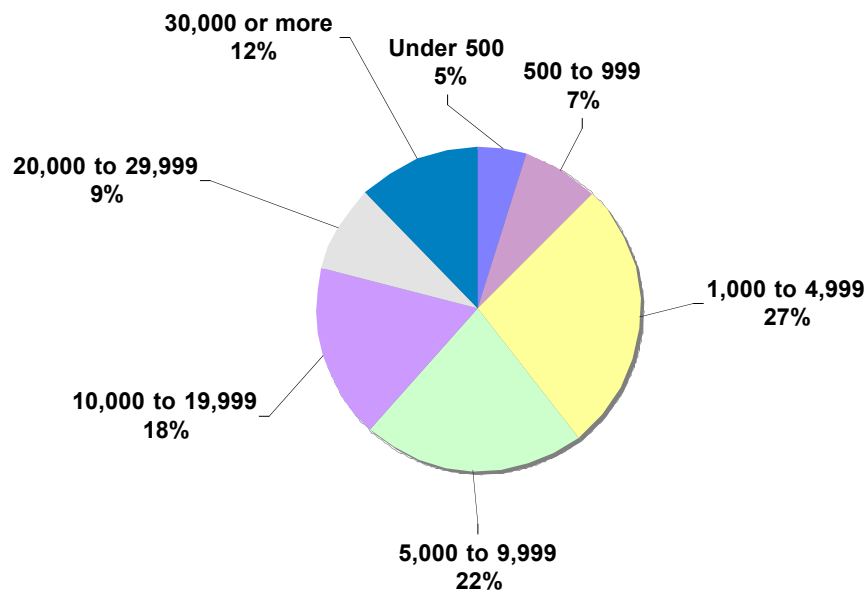**Mean: 15,310**
Median: 7,380

Table 11. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?
% of public libraries by population served and geographic region, 2012–2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Under 500	11%	3%	3%	0%	1%	7%	6%	7%
500 to 999	7%	4%	13%	0%	0%	13%	8%	13%
1,000 to 4,999	25%	32%	27%	6%	16%	44%	24%	28%
5,000 to 9,999	23%	24%	24%	14%	29%	23%	16%	19%
10,000 to 19,999	20%	15%	17%	14%	23%	5%	28%	12%
20,000 to 29,999	7%	7%	8%	29%	8%	6%	10%	10%
30,000 or more	6%	14%	8%	37%	22%	1%	7%	11%
Mean	15,548	14,043	10,489	32,648	20,037	5,887	20,940	12,240
Median	6,346	7,159	6,500	25,499	11,502	3,698	8,596	5,467

The following figure looks at the growth of public libraries' ebook collections—in median number of titles available—since we began this survey in 2010. As expected, the largest libraries have been amassing quite large collections (growing from 2,660 in 2010 to 25,499 three years later). Smaller libraries have been more modestly increasing their collections.

Figure 15. Median number of ebooks library has access to
public libraries by population served, 2010–2013
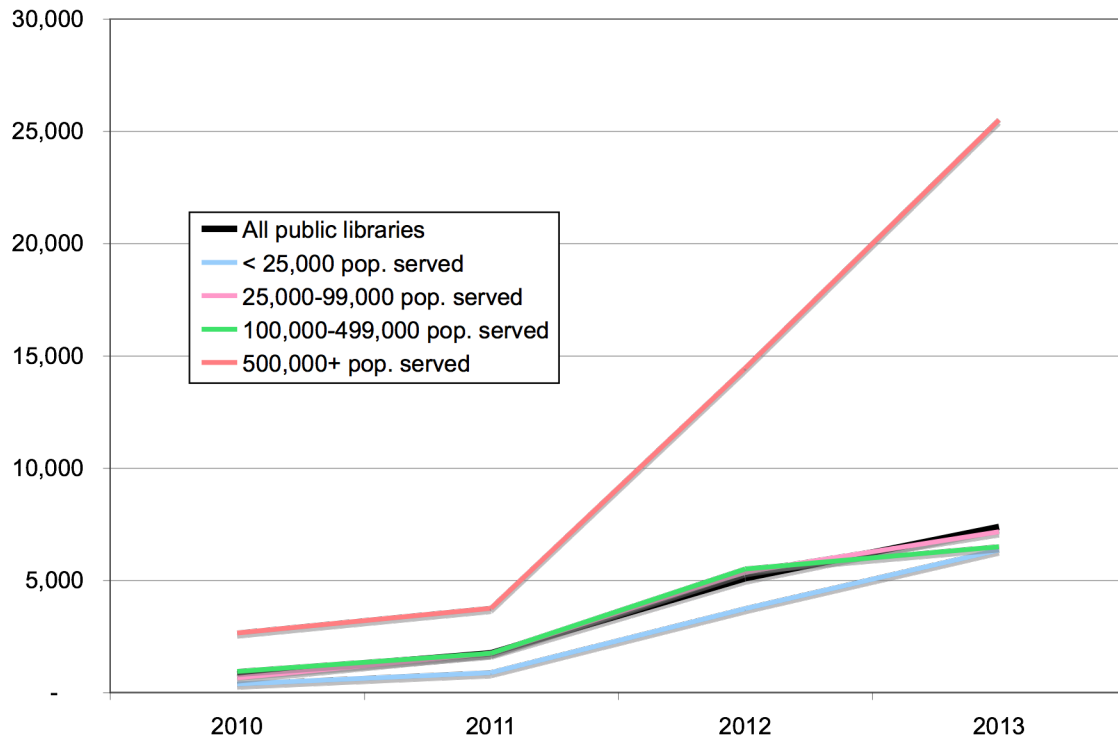
Demand for Ebooks

Supply of ebooks has been growing among libraries across the board. What about demand? Indeed, user demand for ebooks continues to rise, as well. In 2013, 42% of respondents said that they had seen a "dramatic increase" in demand for ebooks, although that's down "dramatically" from 79% last year. Nearly one-half (48%) of respondents reported a "slight" increase in demand, up from 18% last year. "Demand is unchanged" is up a skosh from 2% to 9%, and none of our respondents—this year or last—said that they received no requests for ebooks. So last year was the year for explosion in demand for ebooks, and this year demand is still on the rise, but has been tempered a bit.

Figure 16. Have you experienced a change in demand for ebooks since this time last year? *% of public libraries, 2013*
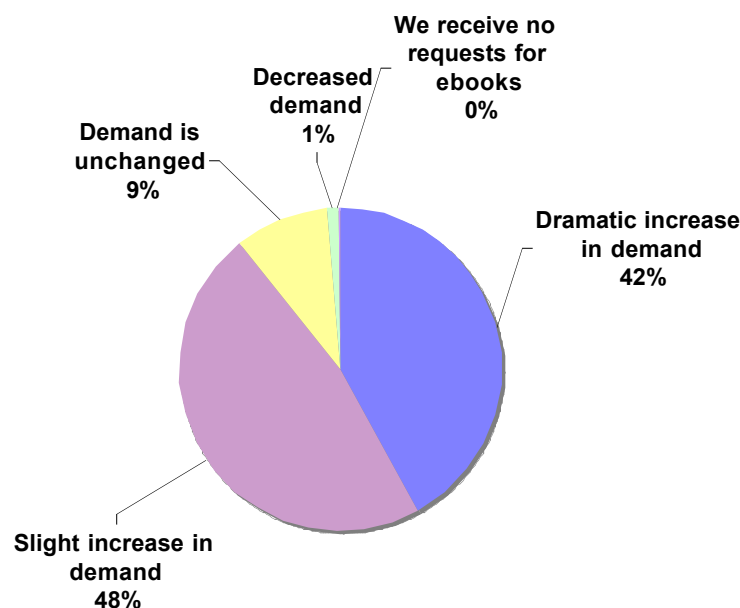

Small libraries report less of an increase in demand for ebooks than larger libraries, and more of them than others (13%) report demand is "unchanged." Which, as we saw earlier, is to say that the *lack* of demand is unchanged.

Table 12. Have you experienced a change in demand for ebooks since this time last year? *% of public libraries by population served and geographic region, 2013*

	Population Served				*Geographical Region*			
	< 25,000	*25,000- 99,000*	*100,000- 499,000*	*500,000+*	*Midwest*	*North- east*	*West*	*South*
NET Increase	85%	90%	90%	97%	95%	83%	90%	87%
Dramatic increase in demand	34%	38%	46%	71%	44%	42%	54%	33%
Slight increase in demand	51%	52%	44%	26%	51%	42%	35%	54%
Demand is unchanged	13%	7%	10%	3%	3%	16%	9%	13%
Decreased demand	1%	3%	0%	0%	2%	0%	1%	0%
We receive no requests for ebooks	1%	0%	0%	0%	0%	1%	0%	0%

Overall, the increase in demand is tapering off as the level of demand for ebooks remains steady—and as public libraries increase the size of their collections.

Figure 17. Have experienced a <u>dramatic or slight increase</u> in demand for ebooks
% of public libraries by population served, 2011–2013
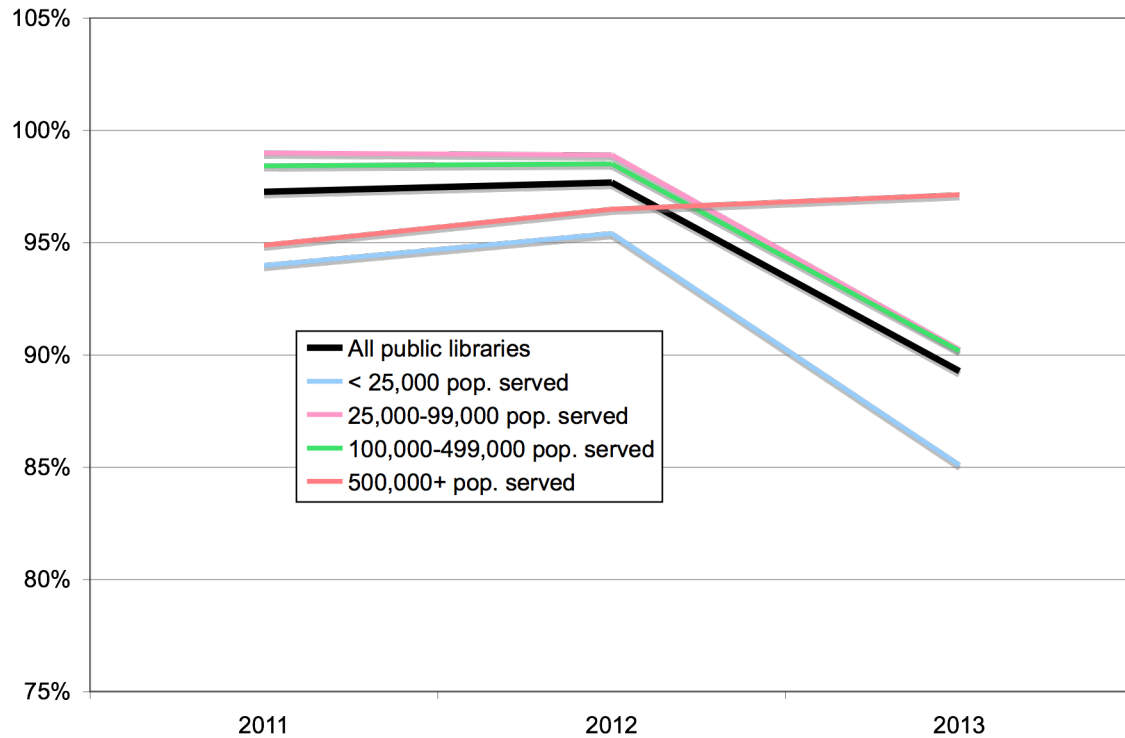
Ebook Circulation

In our current survey, respondents reported a mean circulation/usage of 58,428 ebooks (median: 12,139) in fiscal year 2012. Overall, more than one-half (54%) reported that they circulated 10,000 or more ebooks in 2012.

Figure 18. Approximately what was your total ebook usage/circulation in 2012?
% of public libraries,[6] 2013
<u>**Mean: 58,428**</u>
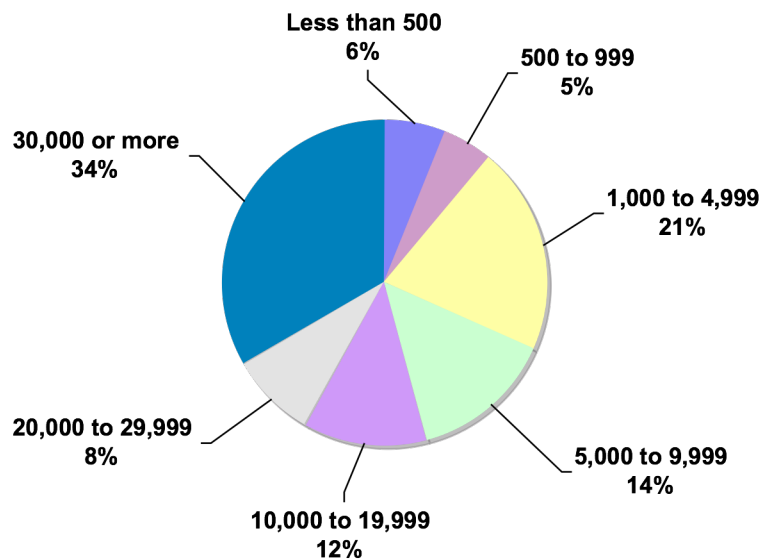<u>**Median: 12,139**</u>

Table 13. Approximately what was your total ebook usage/circulation for 2012?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Less than 500	21%	3%	2%	3%	5%	8%	10%	2%
500 to 999	17%	1%	0%	0%	6%	10%	3%	1%
1,000 to 4,999	40%	26%	4%	3%	18%	40%	11%	16%
5,000 to 9,999	6%	23%	10%	3%	11%	13%	9%	22%
10,000 to 19,999	4%	17%	16%	0%	13%	4%	19%	13%
20,000 to 29,999	1%	9%	14%	3%	11%	0%	0%	18%
30,000 or more	10%	21%	54%	87%	35%	25%	47%	27%
Mean ebook circulation	22,247	42,630	51,957	253,630	43,543	22,314	123,785	63,433
Median ebook circulation	1,483	8,904	40,400	190,000	17,200	3,671	16,000	13,420

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[6] Note that this question is based on libraries who offered ebooks for the entirety of 2012, which is 91% of total respondents.

In constructing the next figure, a chart tracking median ebook circulation for three of the past four surveys (we first started asking the question in 2011), we note that calculations were based on public libraries that had had ebooks for longer than one year.

Figure 19. Median ebook usage/circulation for the previous fiscal year
public libraries by population served, 2011–2013
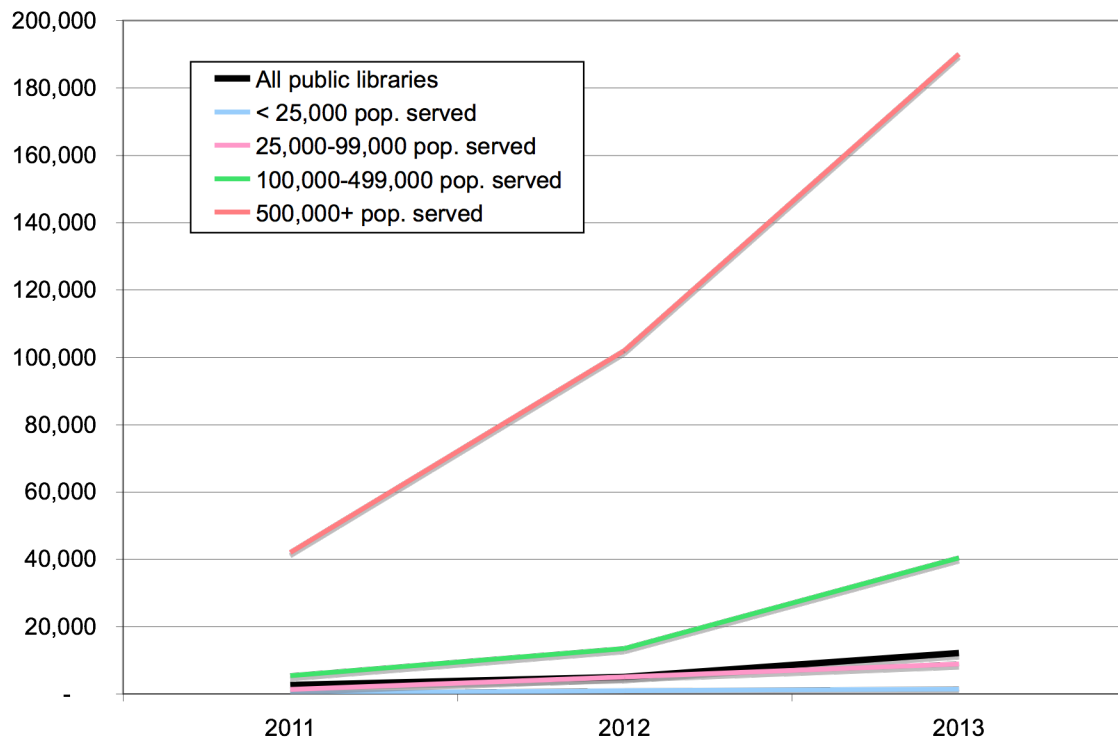
Changes in Circulation/Usage

One perennial question on our survey asks to what extent libraries expect ebook circulation/usage to change over the next year compared to the previous year. A hefty majority (89%) expect ebook circulation to increase, while 9% expect it to remain the same; only 2% expect ebook circulation to decrease.

We also asked respondents to estimate an expected percentage increase or decrease in circulation, and overall, respondents expect a net 39% increase in ebook circulation in the next year. The change expected is highest in libraries in the South (51%) and lowest in the Northeast (25%).

Figure 20. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
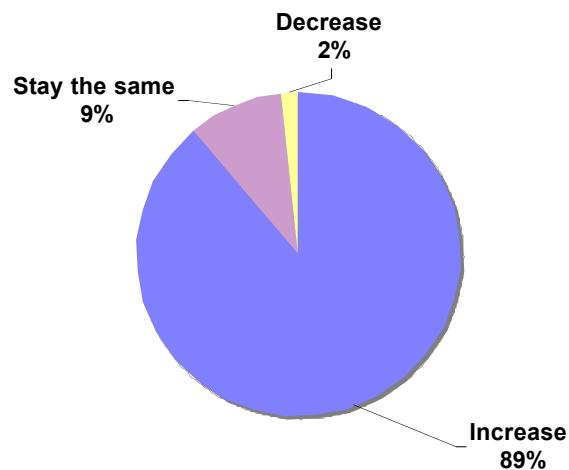*% of public libraries, 2013*

Table 14. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
% of public libraries by population served and geographic region, 2013

	Population Served				**Geographical Region**			
	< 25,000	*25,000- 99,000*	*100,000- 499,000*	*500,000+*	*Midwest*	*North- east*	*West*	*South*
Increase	86%	86%	93%	94%	93%	84%	90%	88%
By what percent?								
Less than 10%	10%	8%	4%	3%	9%	10%	0%	5%
10% to 24%	39%	37%	37%	35%	41%	31%	23%	47%
25% to 49%	27%	30%	35%	29%	29%	34%	32%	26%
50% to 74%	12%	20%	13%	16%	14%	20%	21%	13%
75% to 99%	2%	0%	4%	3%	1%	0%	6%	3%
100% or more	9%	8%	9%	16%	8%	4%	18%	9%
Average % increase	38.6%	51.6%	37.4%	47.7%	38%	29.8%	50.2%	57.9%
Stay the same	14%	12%	5%	3%	6%	16%	10%	10%
Decrease	0%	2%	2%	3%	2%	0%	0%	2%
Average % decrease	0%	8.5%	20.0%	10.0%	12.9%	0%	0%	20.0%
Overall % change expected	33.4%	44.2%	34.5%	44.7%	35.0%	25.0%	45.3%	50.5%

For this question, we created two time series figures to gauge the extent to which ebook circulation is expected to change. In the first (Figure 21), we look at respondents who expect ebook circulation/usage to increase. There is a sense that ebook circulation usage has peaked—or is very close to peaking—among public library users.

Figure 21. Public libraries that expect ebook circulation/usage to <u>increase</u> in the next year compared to the previous year
% of public libraries by population served, 2011–2013
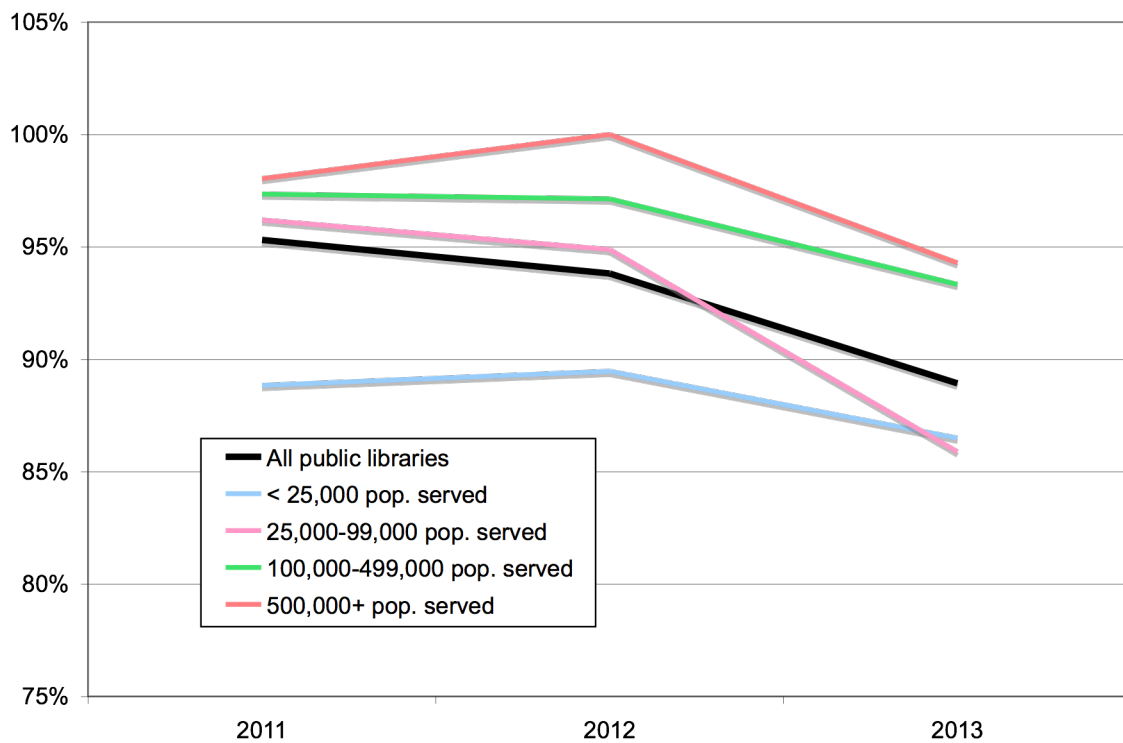
In the second time series (Figure 22), we look at the magnitude of that expected increase, or the overall percent change in ebook circulation/usage.

Figure 22. Overall percentage change in ebook circulation/usage
% increase in ebook circulation, public libraries by population served, 2011–2013
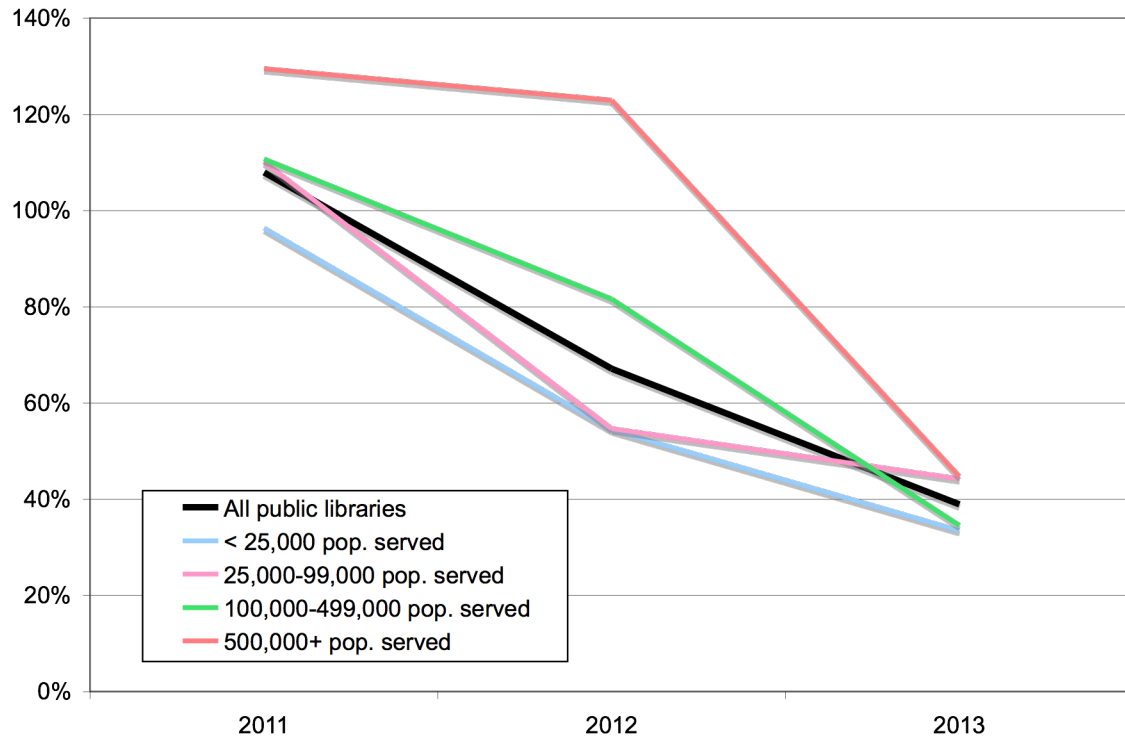
So there is a sense that ebooks are not far away from reaching peak penetration in public libraries.

Ebook Access

A new question added to the 2013 survey asked the extent to which users had unlimited simultaneous access to the library's ebooks, or if they had to be downloaded (or accessed via the Web) one user at a time. The figure and table below show the percentage of titles accessed via each method. A net of 91.1% of public libraries' ebooks are accessed one user at a time. This is a restriction imposed by publishers and is a point of contention among library personnel and especially users who (perhaps not without justification) can't get their heads around the fact that though the technology could allow it, most ebook publishers require that a digital file may only be loaned to one person at a time.

Figure 23. What percent of your library's ebooks are accessed using each of the following methods?
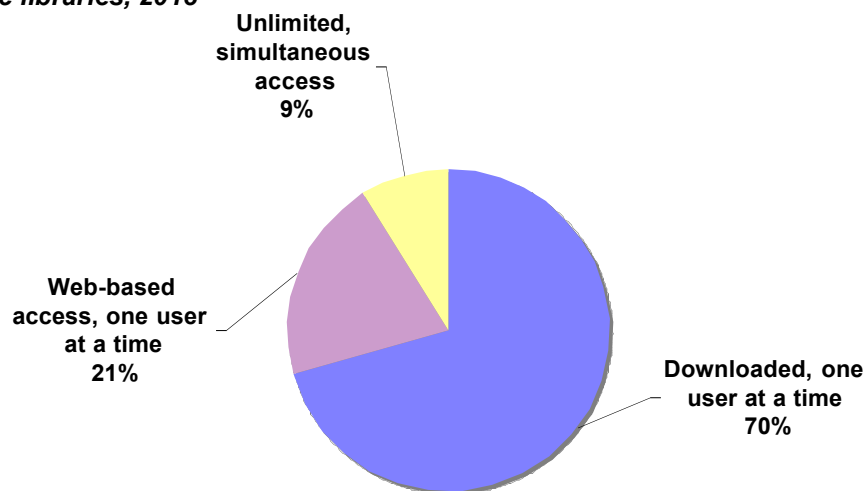*% of public libraries, 2013*

Table 15. What percent of your library's ebooks are accessed using each of the following methods?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
NET % One user at a time	89.0%	90.5%	94.6%	89.5%	88.9%	94.6%	89.2%	92.1%
Downloaded, one user at a time	60.0%	70.3%	75.9%	83.3%	71.3%	71.8%	66.9%	71.9%
Web-based access, one user at a time	29.0%	20.2%	18.6%	6.2%	17.6%	22.8%	22.3%	20.2%
Unlimited, simultaneous access	11.0%	9.5%	5.4%	10.5%	11.1%	5.3%	10.8%	7.9%

Holds-to-Copy Ratio

In previous ebook surveys, we found that by 2011, more than 90% of public libraries allowed users to place holds on ebooks, and that two-thirds of those libraries purchased additional copies to fulfill those holds. We asked in 2011, and again in 2013, if libraries have a set hold-to-copy ratio for ebooks. In 2013, 47% of libraries said that they did, down five percentage points from two years ago. The average holds-to-copy ratio for ebooks is 6:1, unchanged from 2011.

Figure 24. Do you have a set holds-to-copy ratio for ebooks?
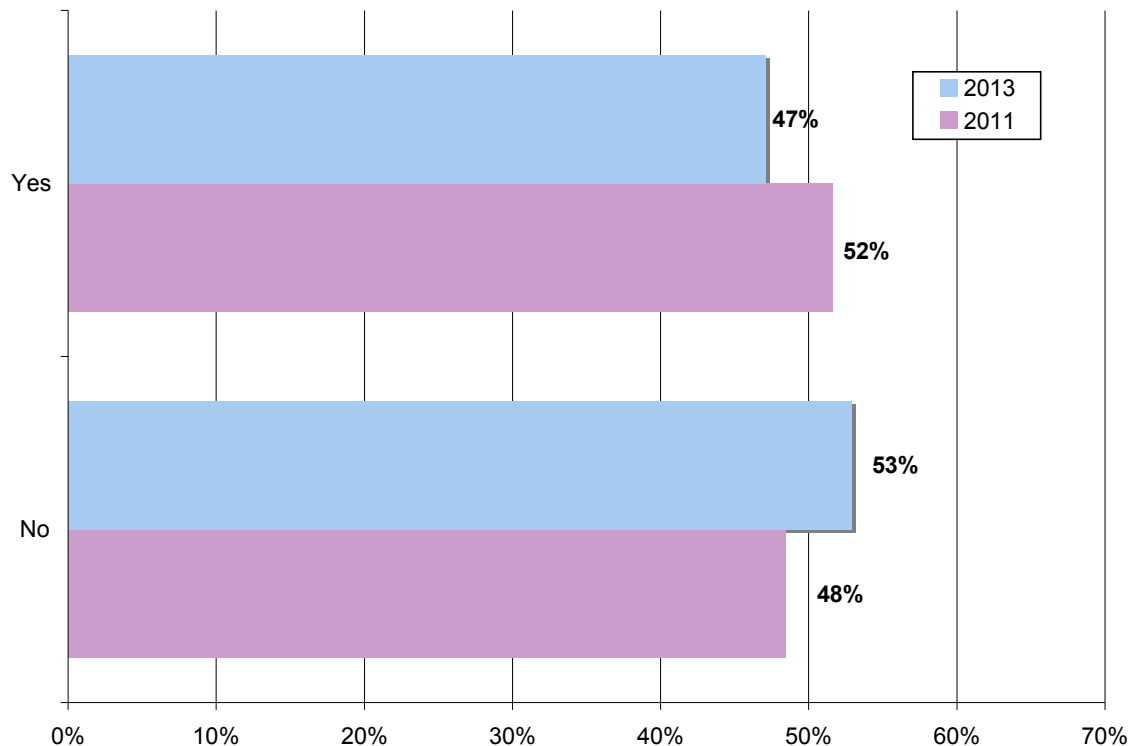*% of public libraries, 2011 and 2013*

Table 16. Do you have a set holds-to-copy ratio for ebooks?
% of public libraries, by population served and geographical region, 2011 and 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2013								
Yes	29%	49%	57%	74%	48%	34%	58%	46%
If yes, the average holds-to-copy ratio is	7:1	6:1	7:1	5:1	6:1	8:1	5:1	6:1
No	71%	51%	43%	26%	52%	66%	42%	54%
2011								
Yes	42%	47%	54%	69%	50%	55%	53%	44%
If yes, the average holds-to-copy ratio is:	7:1	6:1	6:1	6:1	6:1	6:1	6:1	5:1
No	58%	53%	46%	31%	50%	45%	47%	56%

Usage Statistics

One way that libraries gauge the demand for ebooks—and adjust the supply to meet that demand—is through usage statistics. So how easy or difficult is it for public libraries to track usage statistics for their ebooks? (In the past, we have only asked this question in relation to ebooks obtained via a consortium.) The majority (78%) of respondents said they could track usage statistics "easily," while 20% said "not easily" and only 2% said "not at all."

Figure 25. How easily can you track usage statistics for ebooks?
% of public libraries, 2013
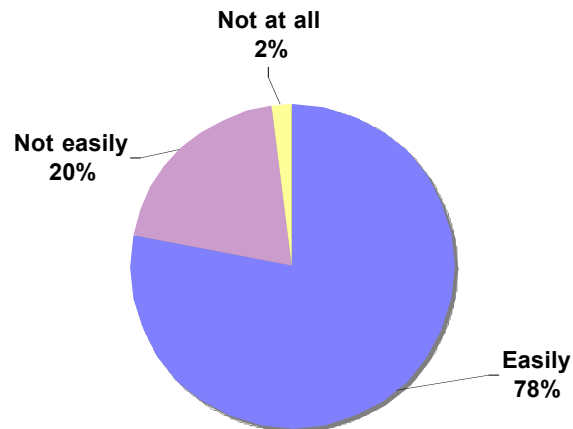
Table 17. How easily can you track usage statistics for ebooks?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Easily	80%	72%	83%	86%	80%	69%	78%	83%
Not easily	17%	26%	16%	14%	19%	26%	20%	15%
Not at all	3%	2%	2%	0%	1%	5%	2%	2%

In Summary

Ebook collections continue to grow as demand for ebooks from library users continues to grow. Today, nine out of ten public libraries offer ebooks to users. That said, last year saw a dramatic spike in demand for ebooks, and this year demand is still rising, but is more subdued as libraries have expanded their offerings to meet the demand.

Demand for ebooks is often a function of how technologically savvy a population base is, and we have found that the smallest libraries are less constrained by lack of money for ebooks than they are by lack of demand. As some write-in comments point out, residents in rural areas[7] often don't even have computers in the home—and are less attached to consumer electronics as those in more populous areas. Still, technology is moving into these areas, even if it is at a slower pace than elsewhere.

Growth in ebook demand may come from younger users. As we discuss in the school libraries version of this report, more and more schools are becoming "1:1 schools"—giving laptop or tablet computers to each student. School library directors expect this to stimulate demand for ebooks, and as these kids get older, they will take their reading (and ereading) preferences with them into adulthood.

As we will see in later chapters of this report, challenges still abound in offering ebooks to users. Access (or lack thereof) to desired titles, problems downloading books to ereading devices, and compatibility issues still very much remain, and these issues will influence demand for ebooks in the future. For the moment, we can attribute the slowdown in demand to maturity of the library market, but it is not out of the realm of possibility that demand may stabilize or even wane in the future due to frustration with ebooks in general.

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[7] This of course isn't limited to rural populations; the poorest in large urban populations also often lack broadband access, home computers, and personal electronics.

In Their Own Words

On our survey, as we do every year, we asked, "If you have any comments about ebooks in your library, please write them below." Here is a sampling of some of these responses (lightly edited).

- *"We are a small rural library. Most of the patrons cannot afford the devices for e-books. They are seniors and prefer a 'book in hand.'"*

- *"Most of our ebook users have been new to the library. We are just now starting to see current library users starting to use ebooks, as often they can get the book much faster than waiting for a print copy. Also, teens' and children's use of ebooks is growing. Most 6th graders will have an iPad this fall in school and we are working with the school system to get them library cards so they can access the ebooks for homework help as well as reading."*

- *"The library itself does not own any ebooks. They are accessible only through the state library consortium of which we pay for membership. They cannot provide specifics on our patrons' borrowing—only total number borrowed."*

- *"Ebooks are extremely popular—and that popularity is growing. Publishers need to get on the bandwagon in working with libraries to promote their publications through public library access. People borrow what they want to try out; they buy what they want to keep—often based on the borrowing experience. Note: It is very difficult to get the answers to the questions asked about the breakdown of the collections as the vendors do not provide that type of information nor do they provide effective search tools to calculate the breakdowns."*

- *"Desire for ebooks is growing in our rural Iowa library."*

- *"Although we will continue to see growth in circulation, there is a limit to the number of patrons who can afford tablets and other devices used for accessing ebooks."*

- *"Ebooks are huge but now the next big thing is either a variety of popular digital materials like Zinio, Freegal, etc., and multiple ebook platforms like OverDrive and 3M Cloud Library."*

- *"Ebooks have been a great additional offering. But as more ebooks are checked out, the corresponding circ figures for print materials has dropped. So it really has been more of a shift in habits rather than an additional demand."*

- *"I feel like we are serving two communities—one that really still wants print materials and one that really wants lots of ebooks. While I love ebooks, I don't think enough books are available for libraries to purchase to make a good collection of just ebooks."*

- *"Rural population, select their own topics of interest. Of 2,500 active patrons, 30 download electronic materials. This will increase, but our hard-copy usage is increasing faster!!"*

- *"Ebooks continue to grow as a format for our library but growth would be even faster if artificial barriers imposed by DRM and publishers did not exist."*

- *"Ebooks are extremely popular—and that popularity is growing. Publishers need to get on the bandwagon in working with libraries to promote their publications through public library access. People borrow what they want to try out; they buy what they want to keep—often based on the borrowing experience. Note: It is very difficult to get the answers to the questions asked about the breakdown of the collections as the vendors do not provide that type of information nor do they provide effective search tools to calculate the breakdowns."*

3. EBOOK COLLECTIONS AND CATEGORIES

This section looks at the specific ebooks held by the public libraries who responded to our survey, as well as the latest ebook circulation figures. We also discuss how libraries promote their collections—and what hinders the public from accessing ebook collections.

Ebook Categories

Virtually all public libraries offer "general adult fiction" (99%) and "general adult nonfiction" (97%). Almost all (96%) also offer "young adult fiction."

Figure 26. Which categories of ebooks does your library currently offer users?
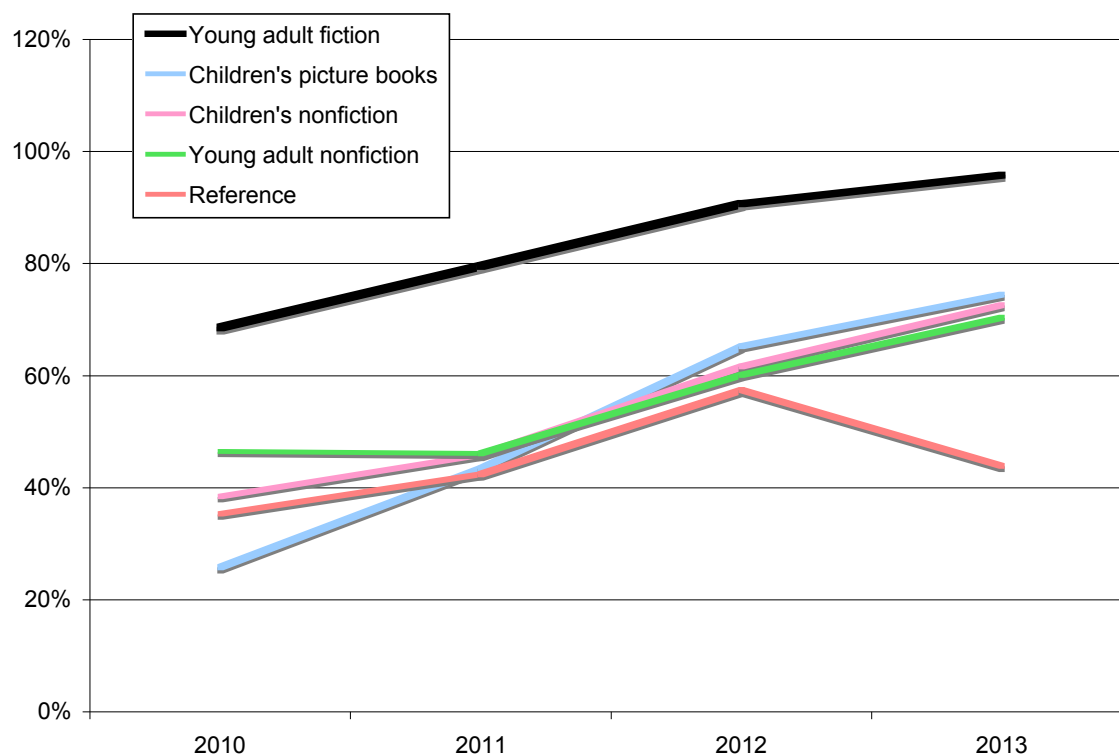*% of public libraries, 2013*
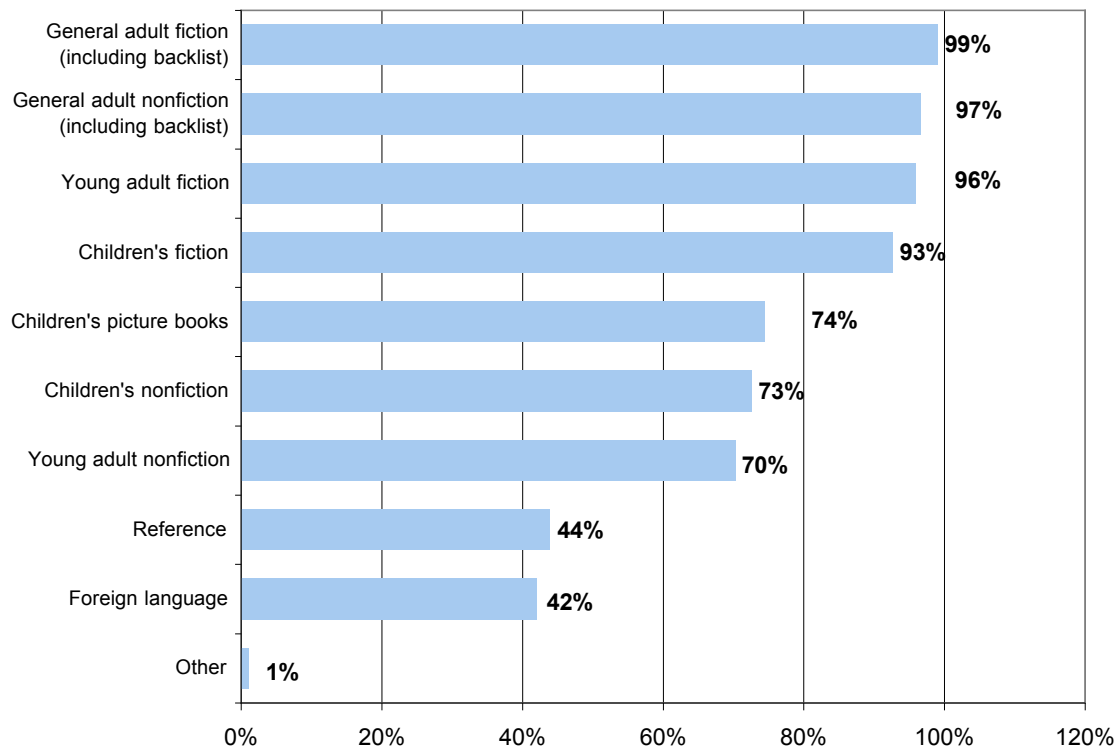
Table 18. Which categories of ebooks does your library center currently offer users?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
General adult fiction (including backlist)	97%	100%	98%	100%	100%	99%	97%	99%
General adult nonfiction (including backlist)	92%	97%	100%	100%	99%	94%	97%	96%
Young adult fiction	93%	97%	95%	100%	98%	97%	95%	93%
Children's fiction	86%	95%	93%	97%	95%	91%	90%	93%
Children's picture books	73%	70%	75%	89%	78%	66%	76%	77%
Children's nonfiction	70%	70%	75%	86%	72%	69%	77%	73%
Young adult nonfiction	72%	71%	62%	89%	69%	65%	77%	68%
Reference	35%	38%	54%	74%	44%	29%	61%	43%
Foreign language	38%	35%	48%	74%	41%	31%	61%	41%
Other	2%	0%	2%	3%	1%	0%	0%	4%

Most public libraries have carried general adult fiction and nonfiction and bestsellers. However, much of the expansion in the past four years has been in amassing more robust collections of young adult and children's titles.

Figure 27. Change in selected ebook categories
% of public libraries, 2010–2013

Note: In 2010, "reference" was specified as "non-circulating."

Fiction vs. Nonfiction

A new question we added to the 2013 survey asked public libraries to estimate what percentage of their ebook collections were fiction vs. nonfiction. Three-fourths (74%) of public libraries' collections is fiction, while 26% is nonfiction.

Figure 28. Approximately what percent of the ebooks you have available are fiction titles versus nonfiction titles?
% of public libraries, 2013
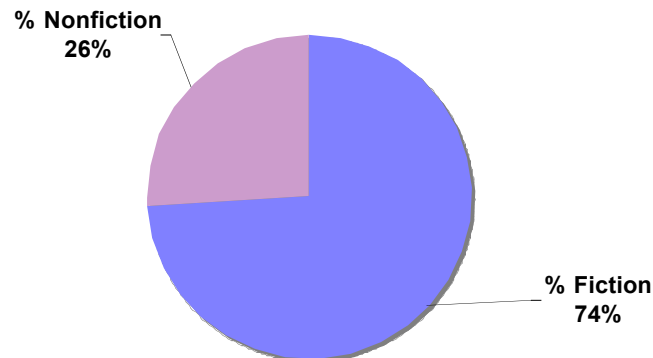

% Nonfiction 26%
% Fiction 74%

Table 19. Approximately what percent of the ebooks you have available are fiction titles versus nonfiction titles?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
% Fiction	72.6%	74.3%	75.3%	69.9%	74.6%	72.7%	73.6%	73.8%
% Nonfiction	27.4%	25.7%	24.7%	30.1%	25.4%	27.3%	26.4%	26.2%

Adult vs. Children vs. YA Titles

As Figure 27 indicated, public libraries have been expanding their children's and young adult ebook collections. Still, adult titles still vastly outnumber ebooks for younger readers. In 2013, adult titles accounted for 71.5% of public libraries' collections (down slightly from 2012), while children's books accounted for 15% (up two points) and young adult books accounted for 13.5%.

Figure 29. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library
% of public libraries, 2012–2013
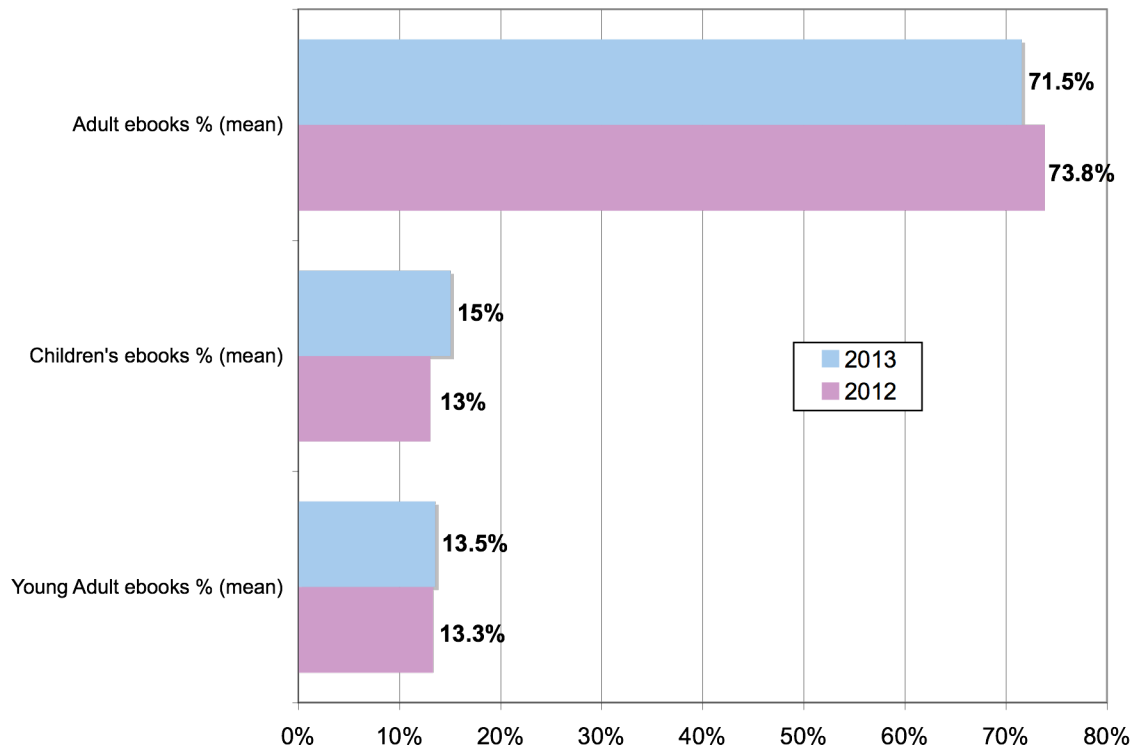
Interestingly, smaller libraries have a slightly higher children/young adult-to-adult ratio.

Table 20. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library
% of public libraries by population served and geographical region, 2012–2013

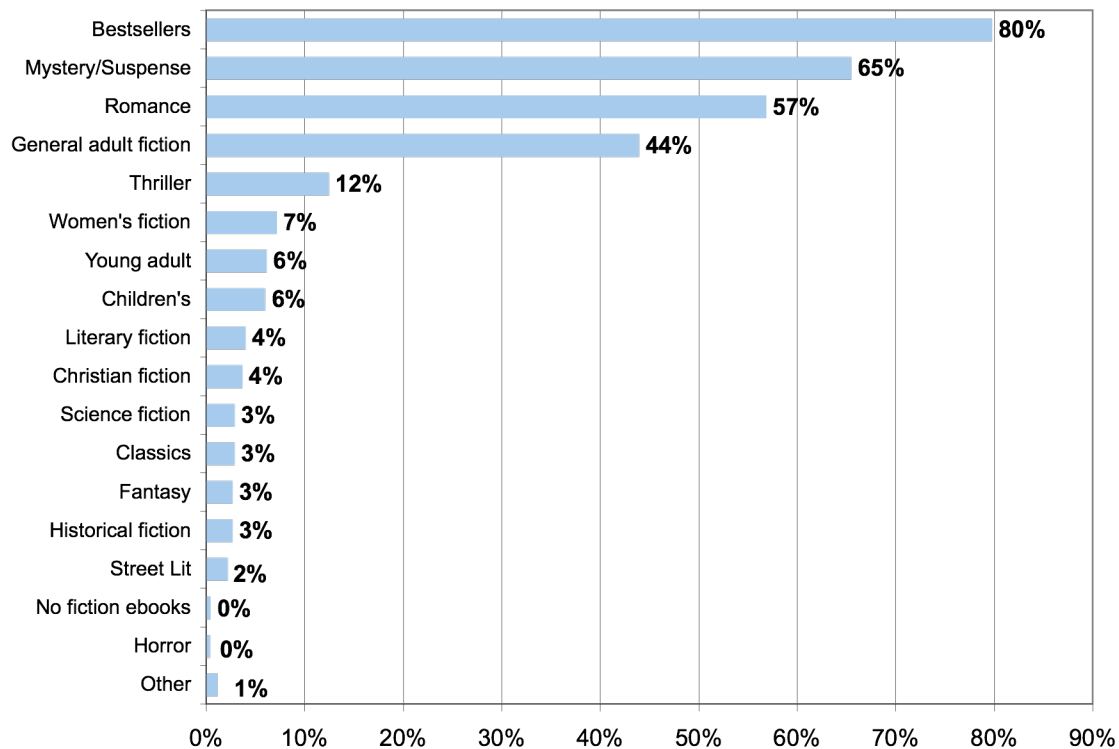|	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2013								
Adult ebooks (mean)	68.1%	71.9%	73.2%	73.8%	69.3%	71.1%	71.7%	74.5%
Children's ebook (mean)	17.3%	14.9%	13.7%	13.8%	16.7%	15%	15.2%	12.8%
Young Adult ebooks (mean)	14.6%	13.2%	13.1%	12.4%	14.0%	13.9%	13.0%	12.7%
2012								
Adult ebooks (mean)	74.8%	73%	74.1%	72.2%	73.9%	73.8%	73.5%	73.5%
Children's ebooks (mean)	12.7%	13.2%	12.5%	14.7%	12.8%	13.6%	13.4%	12.3%
Young Adult ebooks (mean)	12.5%	13.8%	13.5%	13.1%	13.3%	12.6%	13.1%	14.2%

In-Demand Ebook Genres

As always, we drilled deeper into the general categories and asked about specific genres. We divided the results by fiction and nonfiction.

Fiction

The top fiction genre reported by public library respondents was "bestsellers," selected by 80%. This was followed by "mystery/suspense" at 65%, and "romance" at 57%.

Figure 30. What are your top three circulating or most requested <u>fiction</u> ebook categories? *% of public libraries, 2013*

Further corroborating what we saw earlier, small libraries report slightly higher circulation of young adult and children's fiction.

Table 21. What are your top three circulating or most requested <u>fiction</u> ebook categories?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
Bestsellers	77%	82%	76%	87%	88%	76%	73%	77%
Mystery/Suspense	64%	75%	59%	58%	63%	75%	74%	56%
Romance	37%	56%	73%	71%	65%	51%	53%	55%
General adult fiction	50%	45%	38%	32%	42%	46%	42%	46%
Thriller	12%	7%	19%	10%	9%	16%	10%	17%
Women's fiction	6%	8%	8%	10%	7%	5%	7%	9%
Young adult	10%	4%	3%	10%	5%	5%	8%	6%
Children's	8%	7%	5%	3%	2%	8%	10%	7%
Literary fiction	3%	6%	5%	0%	2%	2%	11%	3%
Christian fiction	9%	3%	2%	0%	5%	2%	5%	2%
Science fiction	2%	4%	2%	6%	1%	3%	7%	3%
Classics	6%	3%	0%	0%	4%	2%	2%	2%
Fantasy	3%	2%	3%	0%	1%	2%	7%	2%
Historical fiction	3%	4%	0%	6%	4%	1%	2%	3%
Street Lit	1%	3%	2%	0%	1%	2%	2%	4%
Horror	0%	1%	0%	0%	0%	0%	2%	0%
Other	1%	0%	3%	0%	0%	0%	2%	3%
No fiction ebooks	0%	0%	2%	0%	0%	0%	2%	0%

"Romance" is the most steeply increasing fiction genre. One of the early appeals of romance ebooks was that users could download titles surreptitiously. That has helped drive sales of romance ebooks as well as library circulation of electronic romance titles. Demand for ebook bestsellers peaked in 2011 and is now at its lowest ebb. Part of this could be that publishers don't always make bestsellers available to libraries, so it's possible that demand for the printed editions of bestselling titles has increased or remained stable.
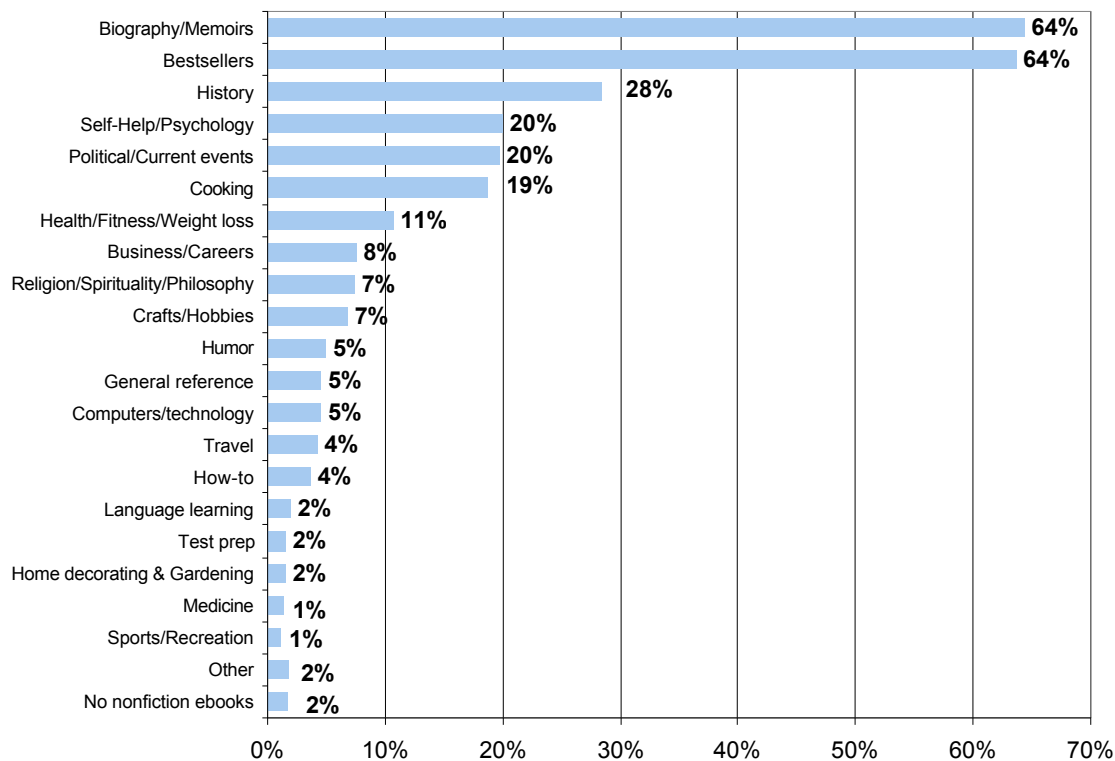
Figure 31. Change in demand for selected fiction categories
% of public libraries, 2010–2013
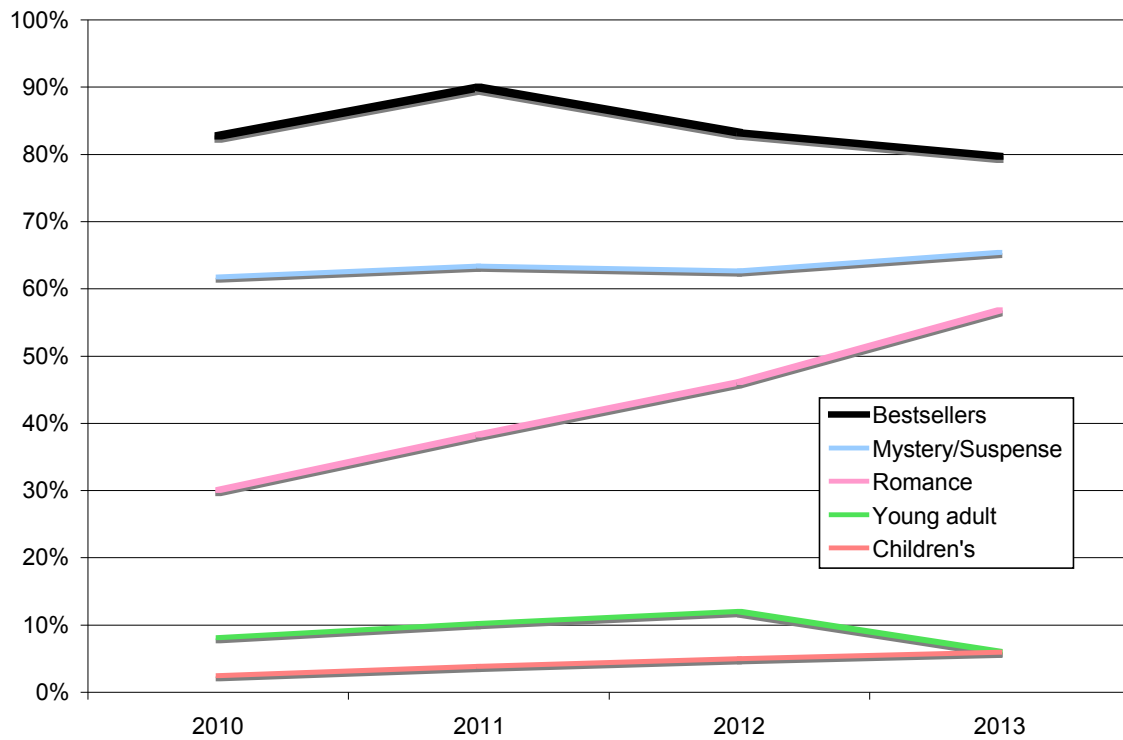
Nonfiction

"Biography/memoirs" and "bestsellers" top the list of most-requested nonfiction ebooks, with both selected by 64% of all public libraries.[8] "History" is a distant second at 28%.

Figure 32. What are your top three circulating or most requested <u>nonfiction</u> ebook categories?
% of public libraries, 2013

Category	%
Biography/Memoirs	64%
Bestsellers	64%
History	28%
Self-Help/Psychology	20%
Political/Current events	20%
Cooking	19%
Health/Fitness/Weight loss	11%
Business/Careers	8%
Religion/Spirituality/Philosophy	7%
Crafts/Hobbies	7%
Humor	5%
General reference	5%
Computers/technology	5%
Travel	4%
How-to	4%
Language learning	2%
Test prep	2%
Home decorating & Gardening	2%
Medicine	1%
Sports/Recreation	1%
Other	2%
No nonfiction ebooks	2%

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[8] As the chart bars suggest, both were selected by 64% due to rounding. "Biography/memoir" was selected by 64.4% of libraries and "bestsellers" by 63.7%.

"Business/careers" spikes among very large libraries (27%), and in fact increases steadily with population size, perhaps reflective of a greater pool of the under- or unemployed in larger geographic areas.

Table 22: What are your top three circulating or most requested <u>nonfiction</u> ebook categories?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Biography/Memoirs	56%	63%	71%	63%	62%	64%	62%	70%
Bestsellers	68%	64%	57%	63%	62%	69%	68%	58%
History	30%	28%	29%	33%	30%	25%	31%	27%
Self-Help/Psychology	16%	18%	25%	23%	17%	22%	22%	23%
Political/Current events	17%	24%	17%	17%	19%	24%	16%	21%
Cooking	18%	19%	21%	23%	22%	12%	18%	20%
Health/Fitness/Weight loss	8%	11%	11%	10%	20%	8%	5%	6%
Business/Careers	5%	6%	10%	27%	9%	6%	11%	6%
Religion/Spirituality/Philosophy	10%	3%	10%	7%	12%	1%	5%	7%
Crafts/Hobbies	8%	9%	5%	7%	8%	5%	6%	7%
Humor	3%	6%	6%	3%	3%	7%	9%	3%
General reference	5%	7%	3%	3%	6%	0%	4%	7%
Computers/technology	3%	6%	6%	0%	1%	5%	9%	4%
Travel	3%	3%	5%	10%	4%	2%	6%	4%
How-to	3%	3%	6%	0%	2%	3%	3%	8%
Language learning	4%	0%	3%	0%	1%	0%	1%	5%
Test prep	0%	2%	2%	3%	0%	0%	7%	0%
Home decorating & Gardening	3%	1%	2%	0%	2%	4%	1%	0%
Medicine	1%	1%	2%	3%	2%	0%	4%	0%
Sports/Recreation	2%	2%	0%	0%	2%	2%	0%	1%
Other	3%	1%	2%	3%	2%	1%	1%	3%
No nonfiction ebooks	3%	2%	0%	0%	0%	5%	2%	2%

Figure 33 shows that demand for "business/careers" ebooks has dropped since the height of the recession. "Biography/memoirs" has traditionally been the top circulating nonfiction ebook category. "History" has been up and down, as has "business/careers." Even "political/current events" is at its lowest ebb, dropping even in 2012, a Presidential election year.

Figure 33. Change in demand for selected nonfiction categories
% of public libraries, 2010–2013
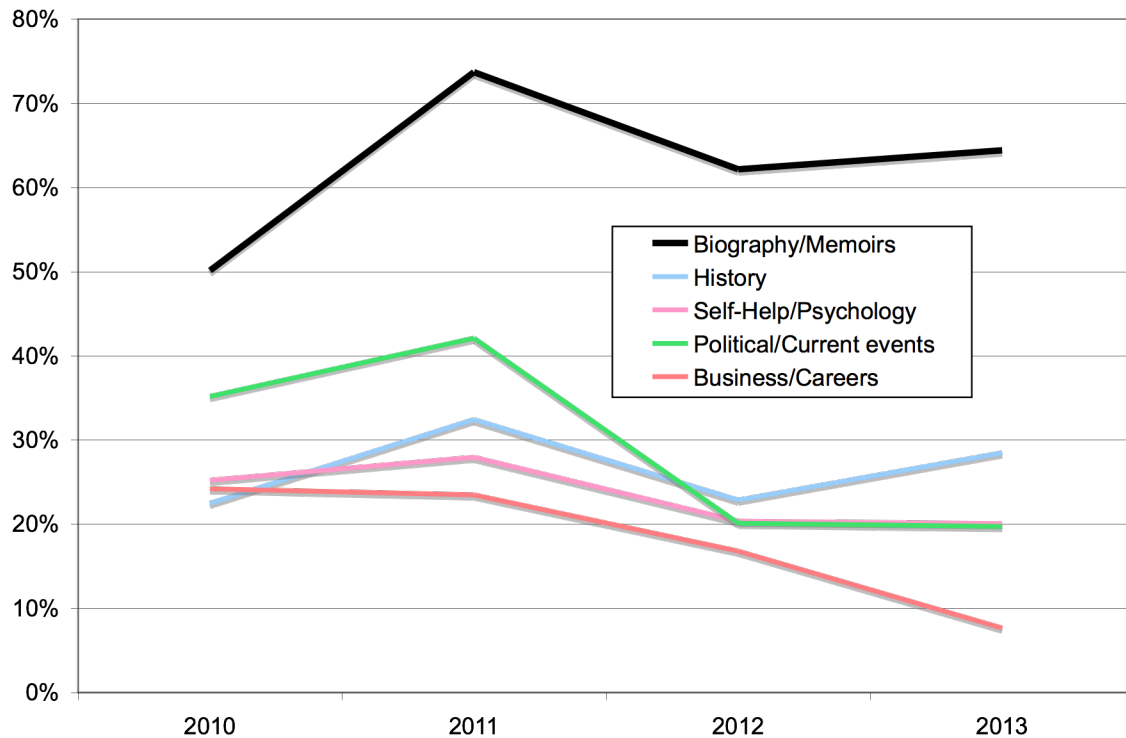
Alternative Books

Last year, we asked public libraries if they would consider purchasing and/or licensing ebook originals or self-published ebooks, and the majority—69%—said they would not. Only 4% said they already carried ebook originals or self-published ebooks.

We expanded this question this year to include not just self-published ebooks and ebook originals (acquired ether through a vendor or from the author directly), but also ebooks from small or independent presses, backlist ebooks, and books available on Project Gutenberg.

Ebook Originals/Self-Published Ebooks

Fifteen percent of public libraries currently acquire ebook originals or self-published ebooks through a vendor, while two-thirds (65%) do not. Another 20% say they are considering it.

Figure 34. Do you supplement your main publisher ebook selections by offering e-originals or self-published ebooks (through a vendor)?
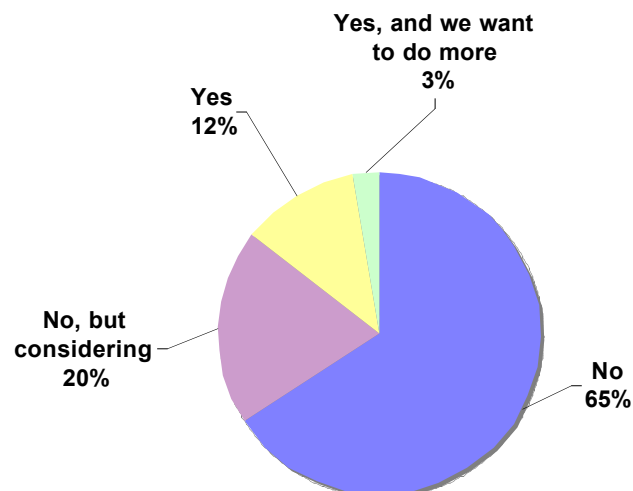*% of public libraries, 2013*

Table 23. Do you supplement your main publisher ebook selections by offering e-originals or self-published ebooks (through a vendor)?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No	76%	71%	55%	50%	59%	71%	67%	70%
No, but considering	17%	22%	22%	17%	31%	19%	10%	15%
Yes	5%	5%	18%	33%	9%	7%	17%	12%
Yes, and we want to do more	2%	2%	6%	0%	1%	3%	6%	3%

Generally, there is little prevalence of library e-originals to be titles by local authors or with a local interest; 70% do not offer e-originals or self-published ebooks by local authors and/or on local subjects, although 23% are considering it. Only 7% say they do offer them.

Figure 35. Do you supplement your main publisher ebook selections by offering e-originals or self-published ebooks (by local authors or on local subjects)?
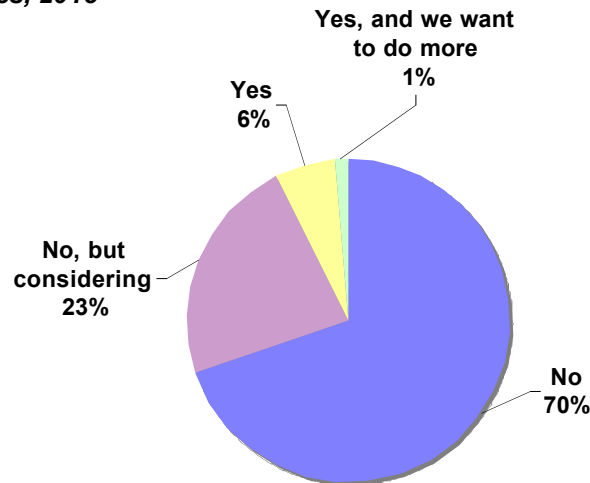*% of public libraries, 2013*

Table 24. Do you supplement your main publisher ebook selections by offering e-originals or self-published ebooks (by local authors or on local subjects)?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No	72%	69%	67%	63%	56%	74%	68%	82%
No, but considering	18%	25%	27%	13%	38%	17%	16%	15%
Yes	3%	5%	6%	25%	6%	5%	12%	4%
Yes, and we want to do more	6%	0%	0%	0%	0%	4%	3%	0%

Two-thirds of survey respondents do not currently offer ebooks from small or independent presses. However, 20% of them are considering doing so. Three out of ten (29%) already do offer small and indie ebooks. (This may change; at the end of this chapter, we will talk about the Douglas County Libraries model.)

Figure 36. Do you supplement your main publisher ebook selections by offering <u>ebooks from small or independent presses</u>?
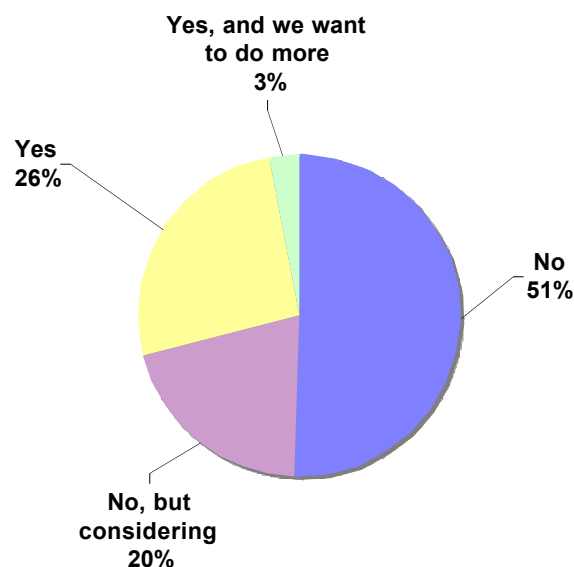*% of public libraries, 2013*

Table 25. Do you supplement your main publisher ebook selections by offering <u>ebooks from small or independent presses</u>?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
No	60%	52%	47%	25%	45%	58%	43%	57%
No, but considering	25%	19%	21%	8%	25%	27%	17%	13%
Yes	9%	24%	32%	63%	26%	15%	35%	26%
Yes, and we want to do more	6%	5%	0%	4%	4%	0%	4%	3%

Generally, libraries acquire backlist ebook titles; 63% offer backlist ebook titles in addition to their main offerings. Twenty-eight percent do not, and 9% say they are considering it.

Figure 37. Do you supplement your main publisher ebook selections by offering backlist ebooks?
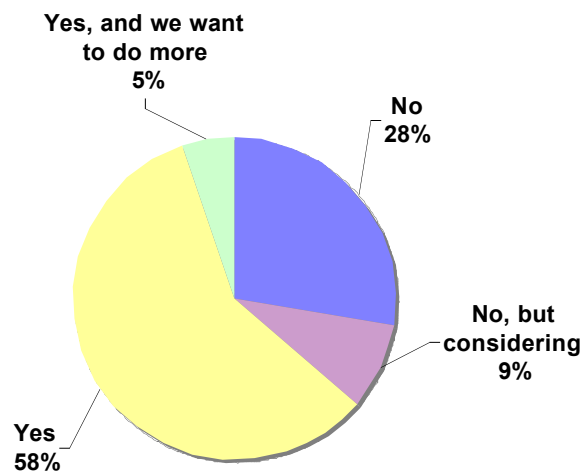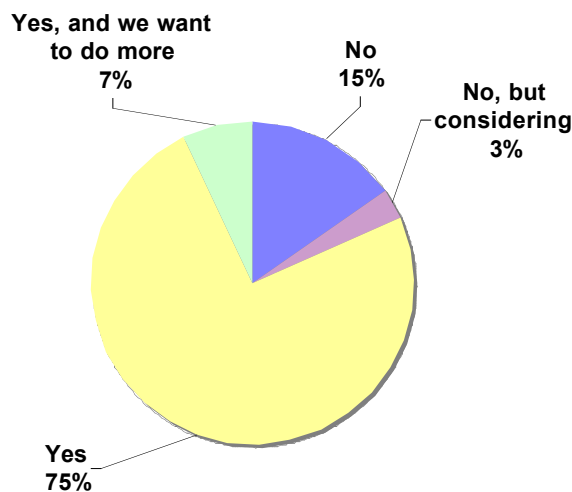*% of public libraries, 2013*

Table 26. Do you supplement your main publisher ebook selections by offering backlist ebooks?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No	54%	25%	17%	8%	28%	37%	26%	21%
No, but considering	14%	12%	4%	4%	19%	9%	5%	0%
Yes	29%	58%	74%	83%	51%	51%	63%	69%
Yes, and we want to do more	3%	5%	6%	4%	2%	3%	6%	10%

Project Gutenberg

Project Gutenberg[9] was initiated in 1971, long before there was anything called an "ebook"—in fact, long before there was an Internet and some years before there were personal computers. Project Gutenberg is an ongoing effort to digitize and archive books and other documents, and the database comprises predominantly public domain titles in a variety of electronic formats. Users do not need to go through a library to access Project Gutenberg titles, but public libraries can and do facilitate access to the database: 82% offer access to Project Gutenberg titles, while only 18% do not.

Figure 38. Do you supplement your main publisher ebook selections by offering Project Gutenberg?
% of public libraries, 2013

Table 27. Do you supplement your main publisher ebook selections by offering Project Gutenberg?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
No	26%	16%	11%	0%	11%	29%	15%	12%
No, but considering	4%	5%	0%	4%	7%	0%	3%	0%
Yes	61%	68%	85%	96%	74%	66%	71%	83%
Yes, and we want to do more	9%	11%	4%	0%	8%	5%	11%	5%

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[9] See www.gutenberg.org.

Promoting Ebook Collections

The "library website" is the top means by which libraries promote their ebook collections (selected by 94% of respondents). Three-fourths (77%) of libraries rely in part on "word of mouth," followed by "flyers and bookmarks" (74%), "signage in the library" (74%), and "social media" (73%). Happily, no one selected "do not promote ebook collection."

In our first ebook survey in 2010, we asked how libraries promote the fact that they have an ebook collection, and in 2013 we reprised the question. We completely revised the choices, so the two datasets are not entirely comparable.

Figure 39. How do you promote your ebook collection?
% of public libraries, 2013
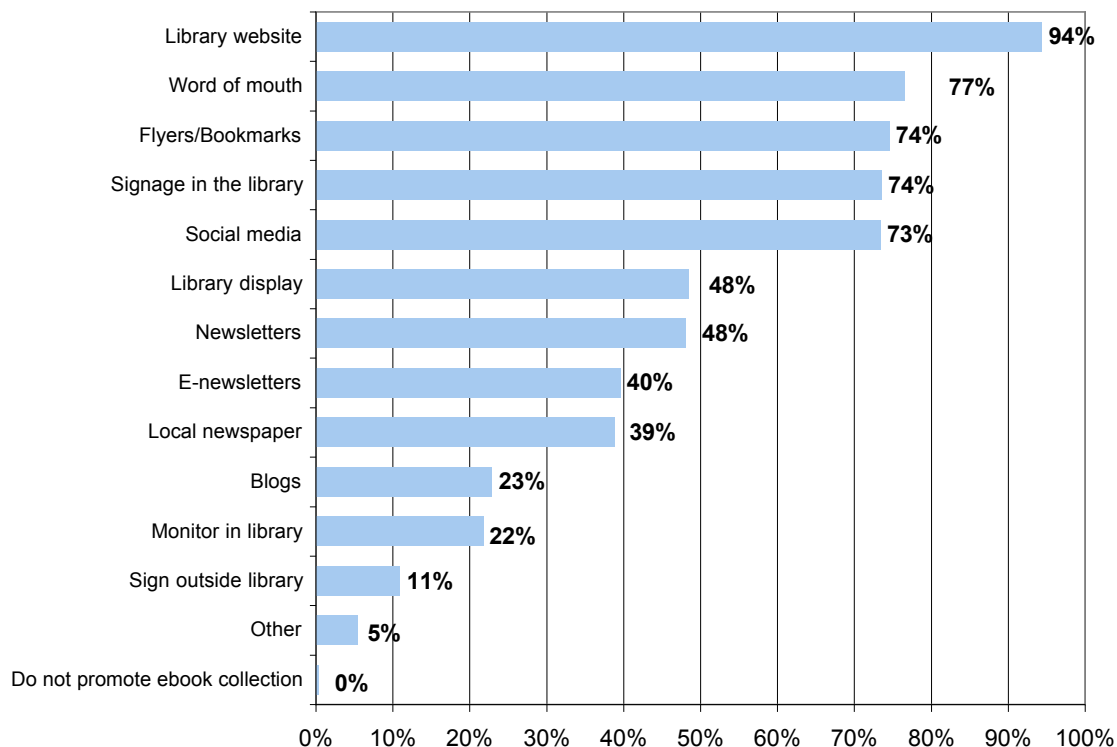
Table 28. How do you promote your ebook collection?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
Library website	87%	97%	97%	97%	92%	90%	100%	96%
Word of mouth	75%	75%	78%	86%	74%	71%	80%	84%
Flyers/Bookmarks	70%	74%	81%	63%	65%	68%	77%	87%
Signage in the library	72%	75%	76%	57%	71%	72%	78%	74%
Social media	57%	76%	79%	91%	79%	69%	79%	68%
Library display	47%	51%	48%	49%	52%	32%	52%	51%
Newsletters	40%	59%	44%	29%	55%	44%	47%	41%
E-newsletters	23%	48%	38%	57%	38%	36%	44%	41%
Local newspaper	33%	45%	41%	37%	37%	27%	44%	45%
Blogs	14%	24%	22%	54%	21%	15%	30%	28%
Monitor in library	10%	32%	21%	14%	24%	14%	25%	22%
Sign outside library	7%	12%	13%	9%	9%	12%	9%	15%
Other	5%	5%	6%	3%	5%	7%	3%	7%
Do not promote ebook collection	0%	0%	2%	0%	1%	0%	0%	0%

The table below shows the promotion methods which public libraries employed back in 2010. At the time, most libraries (80%) relied on their general online catalog or OPAC. Note how social networking/media grew from 35% in 2010 to 73% in 2013.

Table 29. How do you promote your ebook collection?
% of public libraries by population served, 2010

	All public libraries	**< 25,000**	**25,000-99,000**	**100,000-499,000**	**500,000+**
General online catalog/OPAC	80%	70%	83%	82%	88%
Ads for ebooks posted in library/Bookmarks/Fliers	52%	42%	51%	59%	46%
Unique ebook catalog on website	52%	43%	50%	55%	63%
Library newsletter	43%	39%	49%	45%	30%
Social networking	35%	29%	38%	38%	40%
Other	11%	14%	9%	11%	10%

OPAC Discoverability

Another new question added to the 2013 survey asked whether ebooks could be found through the library's general online public access catalog (OPAC). Three-fourths of respondents (75%) said that, yes, ebooks could be discovered via the library's OPAC.

Figure 40. Are ebooks discoverable through your library's general OPAC?
% of public libraries, 2013
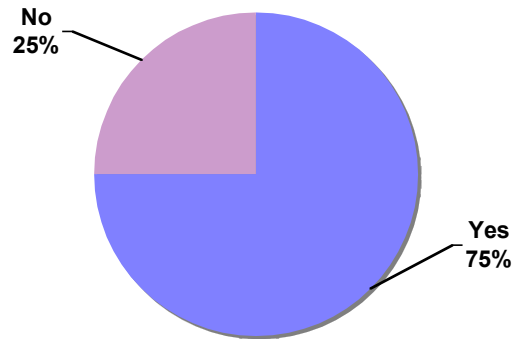
"Yes" responses increased as population served increased, suggesting that larger libraries have better resources to integrate ebooks with the general catalog.

Table 30. Are ebooks discoverable through your library's general OPAC?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Yes	66%	74%	80%	91%	81%	76%	70%	71%
No	34%	26%	20%	9%	19%	24%	30%	29%

Ereading Hindrances

What, if anything, keeps library users from reading ebooks? The top hurdle for library users is "in-demand titles not available," selected by 72% of public libraries. "Ease of use" remains a challenge, so we aggregated all the "ease of use" issues and found that 71% of libraries find some kind of usability issue to hinder the public from accessing the libraries' ebook collection. In addition, "unaware of ebook availability" (63%) and "limited titles available" (62%) are large obstacles. We also note that "users prefer print" was selected by 30% of respondents.

Figure 41. What hinders the public from reading your library's ebook content?
% of public libraries, 2013
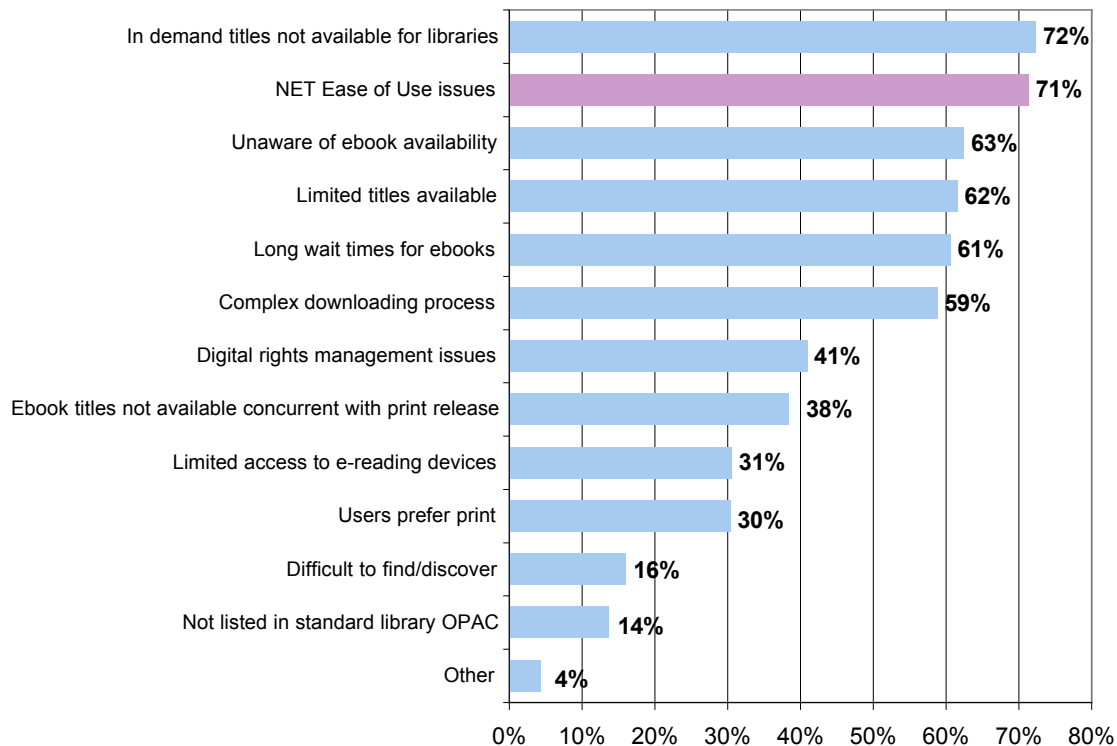
Ease of use issues climb as the populations get larger—and as you go further west. "In-demand titles not available for libraries" also rises substantially as a library gets larger. "Users prefer print," however, drops as the populations get larger.

Table 31. What hinders the public from reading your library's ebook content?
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
In demand titles not available for libraries	59%	75%	78%	71%	76%	73%	69%	68%
NET Ease of Use issues	56%	77%	73%	83%	76%	67%	71%	69%
Unaware of ebook availability	51%	60%	70%	80%	60%	58%	66%	67%
Limited titles available	56%	63%	65%	57%	59%	58%	58%	69%
Long wait times for ebooks	63%	64%	56%	60%	67%	72%	49%	56%
Complex downloading process	44%	65%	60%	69%	64%	57%	57%	54%
Digital rights management issues	27%	40%	49%	49%	48%	31%	44%	35%
Ebook titles not available concurrent with print release	34%	40%	40%	40%	40%	36%	28%	43%
Limited access to e-reading devices	34%	27%	33%	23%	27%	30%	27%	39%
Users prefer print	39%	33%	24%	20%	30%	38%	23%	30%
Difficult to find/discover	11%	13%	16%	43%	20%	9%	13%	18%
Not listed in standard library OPAC	16%	16%	8%	11%	12%	20%	13%	11%
Other	6%	4%	5%	0%	4%	4%	6%	4%

Looking at a handful of ebook hindrances, we see that "demand" issues have generally been on rise; "in demand titles not available" started at 41% when we added it to our survey in 2011, and since then has grown to 72% in 2013 where it is the top hindrance. Aside from the one-year gap (2011) when we changed the phrasing, "limited titles available" has been similarly on the rise. Interestingly, "unaware of ebook availability" waned in 2011–2012, but now is back to the highest this hindrance has ever been (63%). "Users prefer print" had dropped for two surveys, but has rebounded. A statistical issue, or a case of users trying ebooks and getting frustrated and turned off by them? We think a little bit of both.

We created a separate time series for ease of use issues on the following page.

Figure 42. What hinders the public from reading your library's ebook content?
% of public libraries, 2010–2013
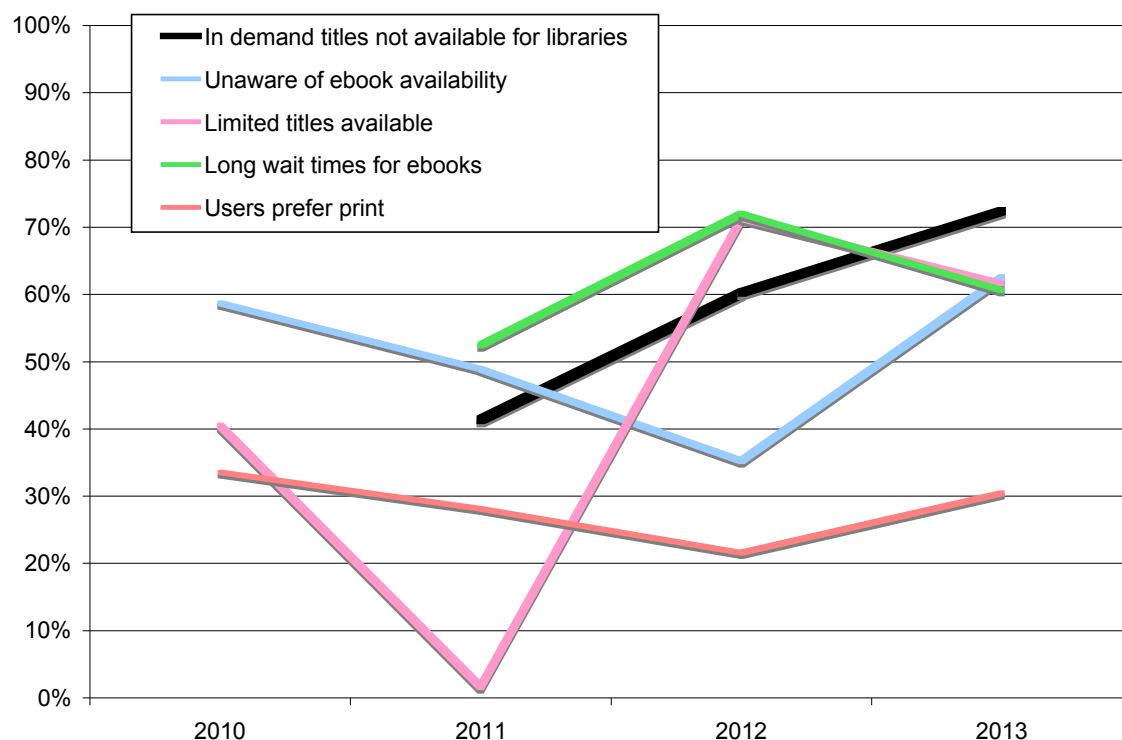
In 2011, "limited titles available" phrased as "limited collection."

In 2011, we began aggregating the assorted ease-of-use challenges to calculate a "net ease of use issues" hindrance. Small libraries have been the least challenged by ease of use problems, although they are the libraries that have the least demand for ebooks. Ease of use problems peaked in 2012 as demand for ebooks peaked. Whether the decline in 2013 reflects a longer-term trend or not will be determined by the next couple of surveys. Our prediction? Continued modest declines. Stay tuned.

Figure 43. Net ease of use issues
% of public libraries by population served, 2011–2013
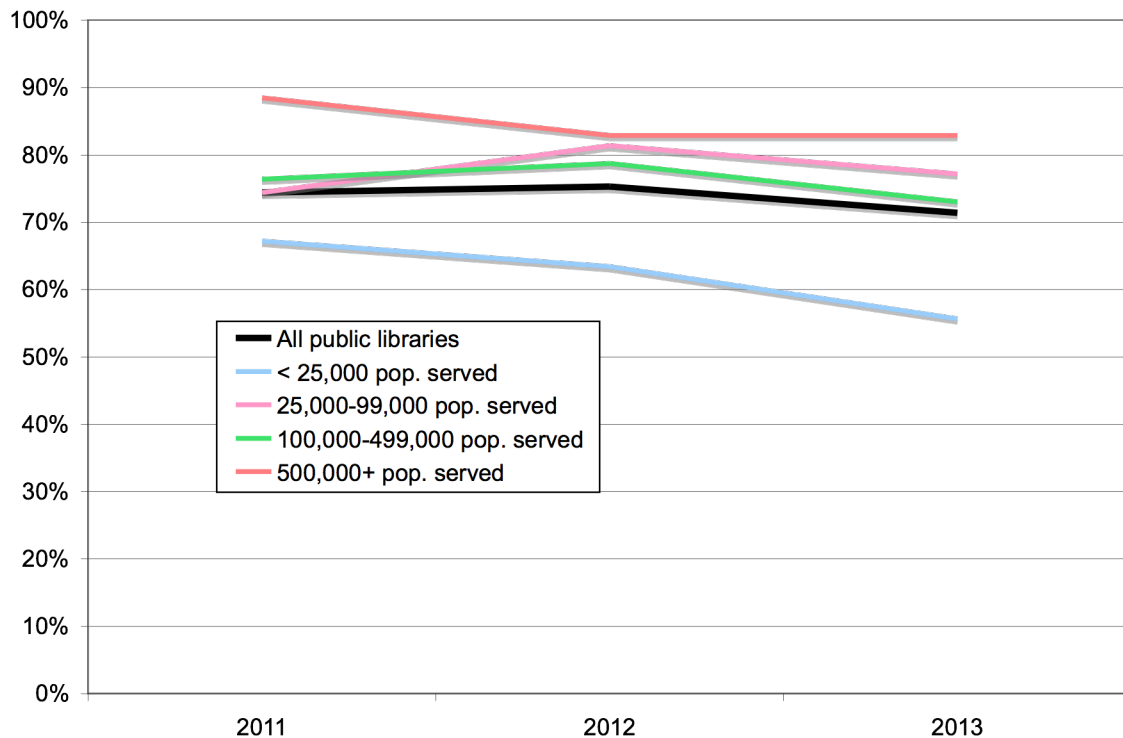
We added a question to our 2013 survey that asks about patrons' voiced concerns (read: complaints) about accessing ebooks. The three concerns were:

- "The library does not offer a digital copy of the title I want to borrow."

- "The wait time to borrow ebooks is too long."

- "I need help downloading ebooks to my device."

Let's look at each of them in turn.

<u>"The library does not offer a digital copy of the title I want to borrow"</u>

Seven percent of library personnel hear this complaint on a daily basis, 43% hear it at least weekly, and 31% at least monthly. Less than one-fifth (19%) only ever hear this rarely or never.

Figure 44. How often do patrons vocalize the following concern about ebooks in your library: "The library does not offer a digital copy of the title I want to borrow."
% of public libraries, 2013
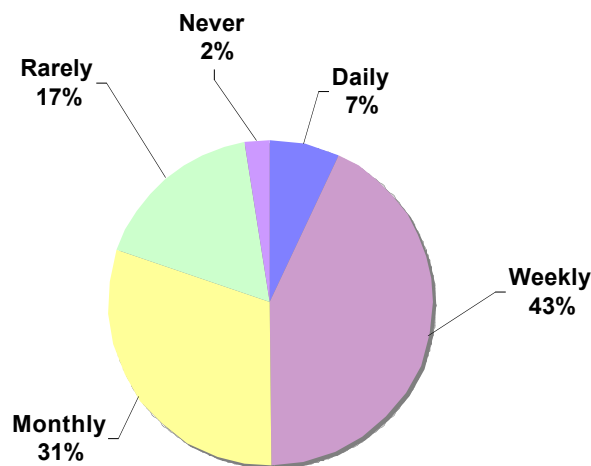
Corroborating what we saw in the previous "hindrances" question, this concern rises as population served rises.

Table 32. How often do patrons vocalize the following concern about ebooks in your library: "The library does not offer a digital copy of the title I want to borrow."
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Daily	1%	5%	11%	15%	6%	2%	6%	13%
Weekly	34%	40%	51%	47%	45%	38%	38%	50%
Monthly	31%	33%	30%	32%	26%	33%	43%	23%
Rarely	25%	22%	8%	6%	21%	23%	12%	11%
Never	9%	0%	0%	0%	1%	4%	1%	4%

"The wait time to borrow ebooks is too long"

A slightly more common concern is "the wait time to borrow ebooks is too long," with 9% hearing this concern on a daily basis, and a further 31% hearing it on a weekly basis. On the other hand, 29% hear it rarely or never.

Figure 45. How often do patrons vocalize the following concerns about ebooks in your library: "The wait time to borrow ebooks is too long."
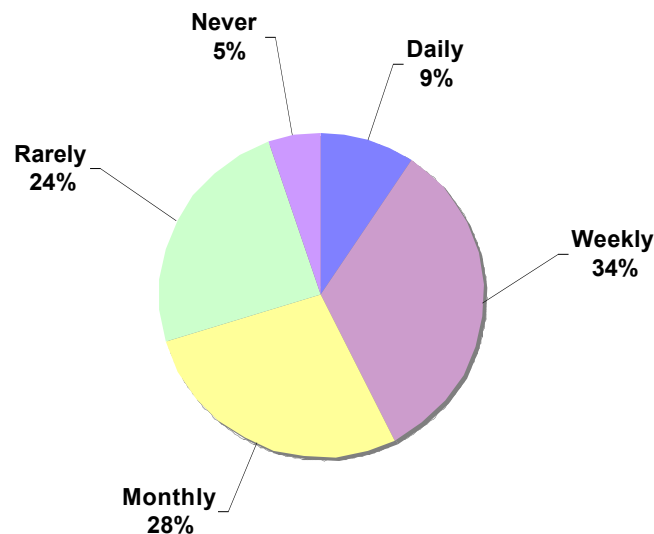*% of public libraries, 2013*

Table 33. How often do patrons vocalize the following concerns about ebooks in your library: "The wait time to borrow ebooks is too long."
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Daily	4%	10%	13%	12%	10%	12%	4%	12%
Weekly	29%	38%	29%	32%	37%	31%	36%	30%
Monthly	34%	23%	27%	29%	31%	34%	17%	26%
Rarely	21%	25%	27%	24%	18%	19%	37%	24%
Never	11%	3%	3%	3%	3%	4%	6%	9%

"I need help downloading ebooks to my device"

Of the three vocalized concerns, this is far and away the most common, with 43% of library personnel hearing it on a daily basis, and a further 44% hearing on a weekly basis. Only 4% hear it rarely or never.

Figure 46. How often do patrons vocalize the following concerns about ebooks in your library: "I need help downloading ebooks to my device."
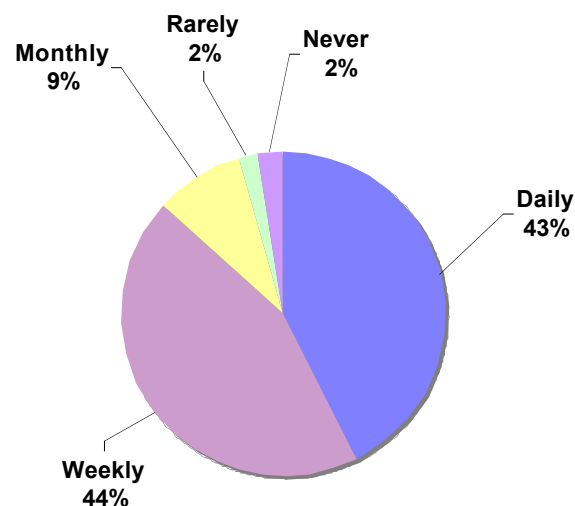*% of public libraries, 2013*

Table 34. How often do patrons vocalize the following concerns about ebooks in your library: "I need help downloading ebooks to my device."
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Daily	21%	45%	54%	59%	46%	34%	45%	46%
Weekly	50%	49%	35%	32%	44%	46%	41%	42%
Monthly	17%	5%	6%	9%	7%	14%	7%	9%
Rarely	6%	0%	2%	0%	3%	3%	2%	1%
Never	6%	0%	3%	0%	1%	3%	6%	2%

In Summary

Library collections are growing, and public libraries are attempting to meet library users' requests, to the extent that vendors and publishers allow.

The independent ebook market is a burgeoning one, and the lack of barriers to entry—such as having to produce and print a large quantity of physical books, as well as being able to sell over the Internet without having to navigate traditional book distribution models—has created opportunities for authors and publishers who have been unable to get their foot in the door of the traditional publishing universe. For libraries, though, the challenges of making independent ebooks available through the platform they are using may thwart their desire to offer these types of titles. Libraries would like to be able to offer them, but the logistics don't always make it easy. Many libraries also obtain ebooks through a consortium, which may also not be amenable to independent ebooks or local authors/titles.

In one case, Douglas County Libraries in Colorado, libraries are turning to "indie" publishers to counter what they feel is unreasonable and unsustainable ebook pricing. As a result, they have identified 12 groups that include more than 800 publishers and have acquired more than 7,000 ebook titles from them. These publishers, says the Douglas County Libraries, "are more responsive to our needs and budgets."[10] These ebooks can be purchased at a discount, and are actually owned by the library. The Douglas County model is starting to gain traction, and it will be interesting to track its progress in next year's ebook survey.

Library users still have trouble getting ebooks on devices, and ease of use issues remain top challenges, even if they are not at historical highs. A reported rise in ease of use problems closely mirrors a rise in demand for ebooks. However, we have also been tracking steeper rises in "availability" challenges. As demand for ebooks reaches its maximal level, we would expect to see technical challenges ebb and availability challenges rise or, eventually, plateau.

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[10] An open letter about eBooks and Douglas County Libraries, http://douglascountylibraries.org/content/ebooks-and-DCL.

In Their Own Words

Here is a second helping of verbatim comments from our survey:

- *"The biggest problem is the different DRM and also apps to access different vendors offerings."*

- *"It seems like the independent ebook market is burgeoning right now and we'd be interested, but aren't prepared or staffed to run our own platform, so we'd need someone else to host and maintain for us to delve into this realm. But, we're certainly not opposed to it."*

- *"Demand for ebooks continues to grow. I see steady increases in use. Biggest problem is downloading through Adobe Digital Editions for older ereaders (it's a hassle). We just purchased a Tumblebooks membership last year for our children's ebook use, very popular with our patrons."*

- *"Working through three main vendors: OverDrive (consortium), Freading (Library Ideas), EBSCO ebooks. Also non-downloadable via Gale Virtual Reference Library & Tumblebook Library."*

- *"This year we received a grant to join the Oklahoma Virtual Library consortium, which is a customer of OverDrive. The grant money is the only money being spent on ebooks. As part of the consortium terms we will select titles worth $1000/yr, but this money is part of the grant."*

- *"We buy very few self-published ebooks and the ones we do buy do not circulate well."*

- *"We would like to go with multiple platforms, but hosting platform costs keep us from offering more ebooks outside our one vendor (OverDrive)."*

- *"We have not seen reduced use of our print collection. Customers do not understand one book/one user...it's on the web so should be immediately accessible. We are constantly asked for specific titles that publishers will not sell to libraries and customers don't get this at all. We have no power over how the books are cataloged or searched so finding books for specific ages is horrendous. Customers are limited in how they can search the collection to narrow search results. At times I see ebooks as a way to make backlist books available when shelf space is limited. I don't think most customers access ebooks through the catalog. I think they browse the OverDrive collection. The more vendors we add, the more places people have to look and that seems very, very clunky."*

- *"The general public doesn't understand that often publishers refuse to sell to libraries. We share this information when we can."*

- *"The primary and overwhelming concern/problem is being unable to purchase popular ebook titles for our patrons because publishers have not made them available through Overdrive. We have the money to spend, they just won't provide titles for our library to buy!"*

- *"Downloading library ebooks is very complex. Patrons get discouraged. We use both Overdrive and 3M, and are unhappy with each of them in different ways."*

- *"Ebook collection is managed by our library system, so we are not familiar with some of the statistical information. The most common comments from our users is that popular titles aren't available, wait periods are too long, and browsing the collection takes too long."*

- *"It would be helpful to have wider access to ebooks, with more than one person able to download an ebook concurrently."*

- *"I wish the children's ebook choices were better for public libraries. The Brain Hive option is really attractive, but the database entry for patrons wouldn't work in a public library."*

- *"Making public aware of our services is the most challenging. The resistance by publishers to provide titles as well as the cost has hurt us as well."*

- *"Most of our ebook users have been new to the library. We are just now starting to see current library users starting to use ebooks as often they can get the book much faster than waiting for a print copy. Also, teen and children use of ebooks is growing. Most 6th graders will have an iPad this fall in school and we are working with the school system to get them library cards so they can access the ebooks for homework help as well as reading."*

- *"Patrons don't understand why all ebooks aren't available all the time."*

- *"Some patrons just like to come here and pick up their titles. The e titles are not completely ready for public consumption before being purchased by libraries. One problem: title's font is tiny and cannot be enlarged. 'They are working on it.' Patrons expect titles to be fully ready following the introduction of the program."*

- *"Still looking for a platform other than OverDrive."*

- *"The biggest barrier to access for our patrons is in demand titles that are not available to libraries."*

- *"Use is growing, but we are frustrated at our inability to get popular/important titles due to lack of cooperation by publishers."*

- *"We are currently under contract to OverDrive. Two of us do selection and we both hate OverDrive and do not feel that it is worth the effort and expense that we are putting into this collection."*

- *"We have made an effort to provide classes to train people to use their ereaders, provide weekly computer help desks for people having problems, and offer classes with newest devices in an effort to keep up with questions about it."*

- *"We just recently began offering ebooks through Baker & Taylor's Axis 360 website. So far it has been successful. With the new AxisReader app and a hopefully expanding collection, I believe our patrons will have positive experiences borrowing ebooks from our library system."*

- *"We've used OverDrive for over a year now through a state consortium. We also started using Axis 360 in May to give our patrons more options. So far the patrons have been less than enthused."*

- *"Wish publishers would not raise prices to OverDrive or refuse to make ebooks available to OverDrive."*

4. EBOOK BUDGETS AND BUYING

This section looks at how much of libraries' budgets are spent on ebooks, what purchasing terms libraries typically acquire, how many are part of larger buying consortia, and to what extent funds are being reallocated from elsewhere, such as printed materials.

Ebooks and Materials Budgets

In this section, we look at what percentage of public libraries' materials budgets ebooks comprised.

Last Year's Budget

Ebooks represented a mean of 5.5% (median 4.2%) of the last year's (2012) materials budget, with only 7% of respondents saying that none of the materials budget went for ebooks. Some libraries also obtain ebooks through their consortium (see later in this chapter) or via special grant.

Figure 47. Approximately what percentage of your library's materials budget did ebooks represent <u>last year</u>?
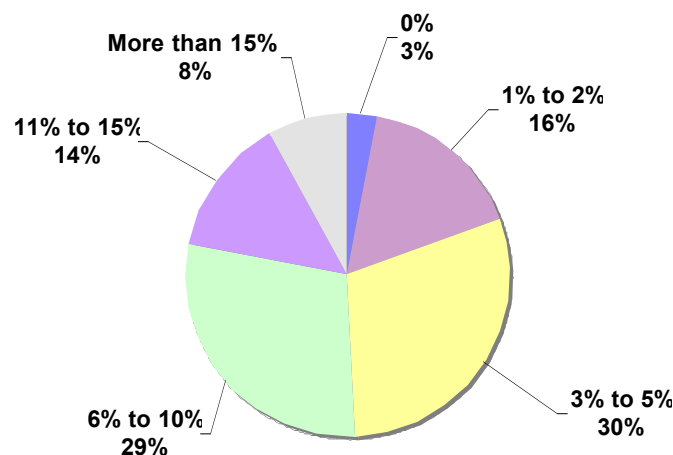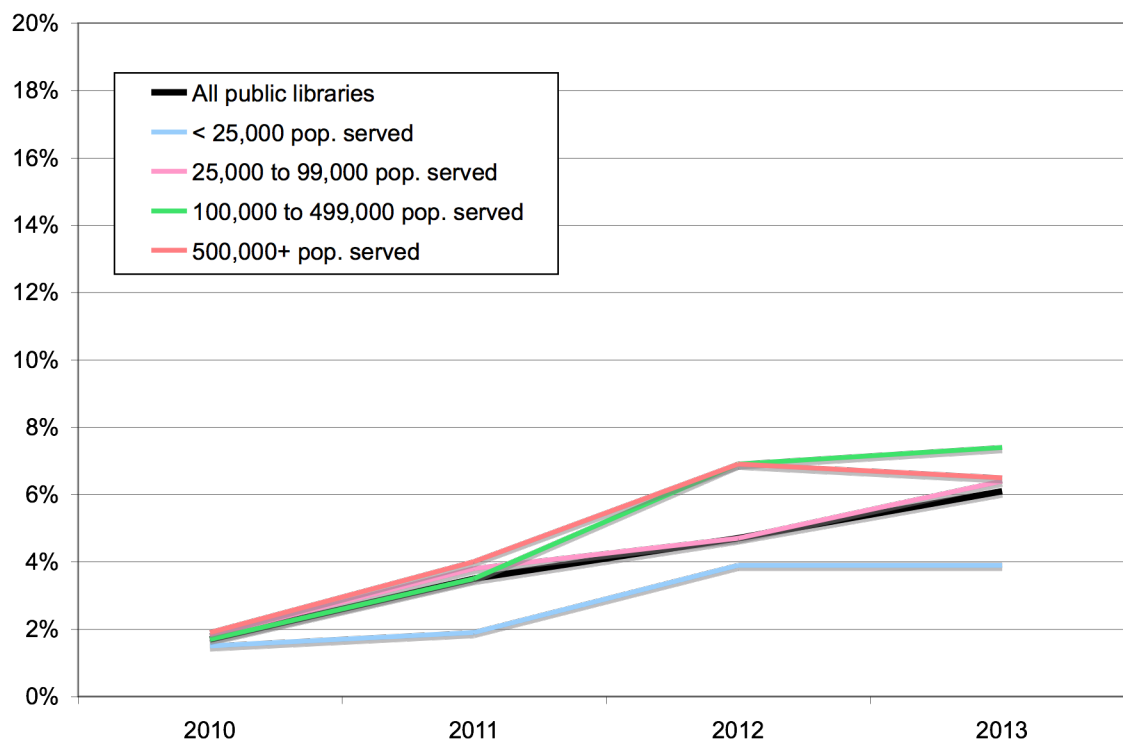*% of public libraries, 2013*
<u>**Mean: 5.5%**</u>
<u>**Median: 4.2%**</u>
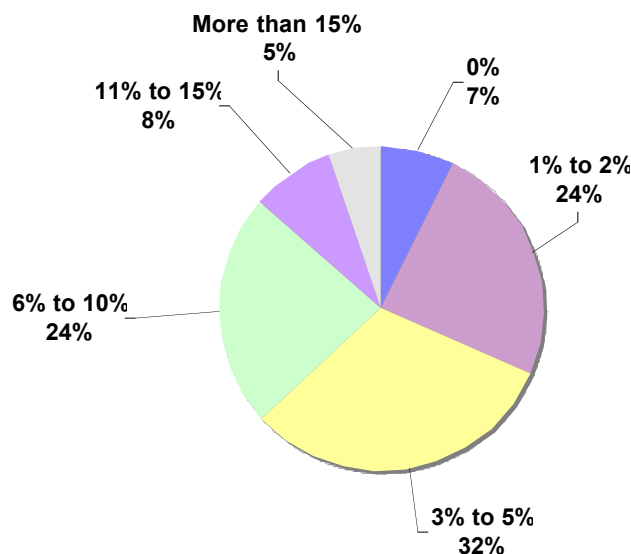
Table 35. Approximately what percentage of your library's materials budget did ebooks represent last year?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	15%	5%	5%	0%	2%	5%	11%	13%
1% to 2%	35%	25%	16%	21%	28%	23%	20%	20%
3% to 5%	23%	38%	35%	29%	34%	41%	33%	24%
6% to 10%	20%	18%	29%	29%	22%	22%	30%	22%
11% to 15%	3%	8%	9%	21%	10%	6%	5%	10%
More than 15%	4%	7%	5%	0%	4%	3%	1%	11%
Mean %	4.1%	5.6%	6.1%	6.5%	5.5%	5.0%	4.9%	6.3%
Median %	2.0%	4.1%	4.6%	5.5%	4.2%	4.1%	4.2%	4.4%

This Year's Budget

In the current (2013) budget, ebooks have increased modestly as a percentage of the overall materials budget, representing a mean 7.0% (median 6.1%). Also note that those who said that ebooks did not represent any part of the materials budget dropped to 3%.

Figure 48. Approximately what percentage of your library's materials budget do ebooks represent in the current year (2013)?
% of school libraries, 2013
Mean: 7.0%
Median: 6.1%

Table 36: Approximately what percentage of your library's materials budget do ebooks represent in the current (2013) year?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
0%	7%	3%	0%	0%	0%	2%	0%	9%
1% to 2%	30%	12%	11%	8%	22%	17%	13%	11%
3% to 5%	29%	31%	26%	38%	24%	45%	34%	24%
6% to 10%	20%	31%	37%	33%	31%	20%	40%	26%
11% to 15%	7%	12%	19%	17%	16%	12%	8%	18%
More than 15%	6%	10%	7%	4%	7%	5%	6%	12%
Mean %	5.2%	7.3%	7.9%	7.2%	7.1%	6.2%	6.7%	7.7%
Median %	3.9%	6.4%	7.4%	6.5%	6.5%	4.4%	6.3%	6.8%

In four years, ebooks have grown from just under 2% of public libraries' materials budgets to more than 6% for all but the smallest libraries.

Figure 49: Median percentage of current materials budget represented by ebooks
public libraries by population served, 2010–2013

How much of the materials budget will ebooks represent five years hence—in 2018? On average, public libraries predict that ebooks will account for 12.4% of the materials budget in five years (median 13.2%). No one believes that ebooks will not represent any part of the materials budget in 2018.
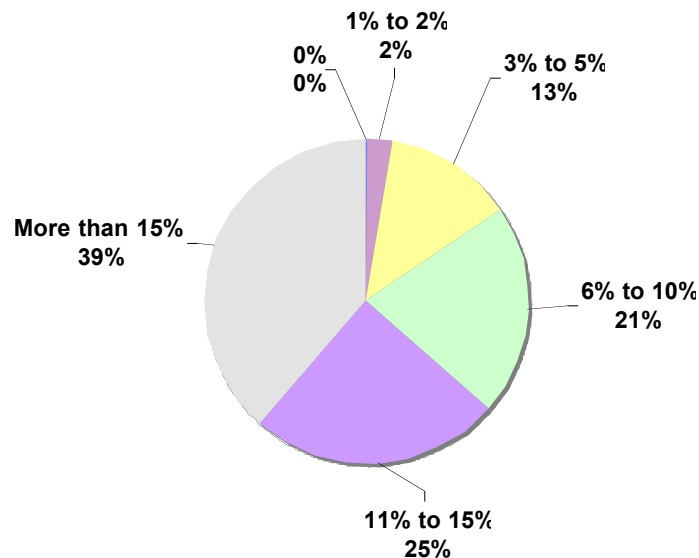
Figure 50. Approximately what percentage of your library's materials budget do you predict ebooks will represent in 5 years?
% of public libraries, 2013
Mean: 12.4%
Median: 13.2%

Table 37. Approximately what percentage of your library's materials budget do you predict ebooks will represent in 5 years (2018)?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
0%	1%	0%	0%	0%	0%	0%	0%	1%
1% to 2%	4%	0%	4%	4%	1%	5%	3%	3%
3% to 5%	20%	16%	6%	8%	11%	24%	7%	11%
6% to 10%	19%	25%	17%	17%	27%	15%	12%	22%
11% to 15%	25%	18%	30%	25%	24%	32%	36%	16%
More than 15%	30%	42%	43%	46%	37%	23%	42%	48%
Mean %	11.1%	12.5%	13.4%	13.2%	12.4%	10.6%	13.5%	12.9%
Median %	11.8%	13.2%	14.1%	14.3%	12.9%	11.6%	14.1%	14.4%

Looking at four surveys' worth of five-year projections, we see that public libraries have been increasingly of the opinion that ebooks will grow, although their forecasts have leveled off in our most recent survey. In 2010, respondents felt that in five years (that is, in 2015) ebooks would represent 7.3% of their materials budgets. And when you consider that 2015 is only two years away, and ebooks already currently account for 6.1% of libraries' materials budgets, it seems we are on track to bear those numbers out, barring an abrupt collapse in demand for ebooks.

Figure 51: Median percentage of materials budget represented by ebooks in five years *public libraries by population served, 2010–2013*
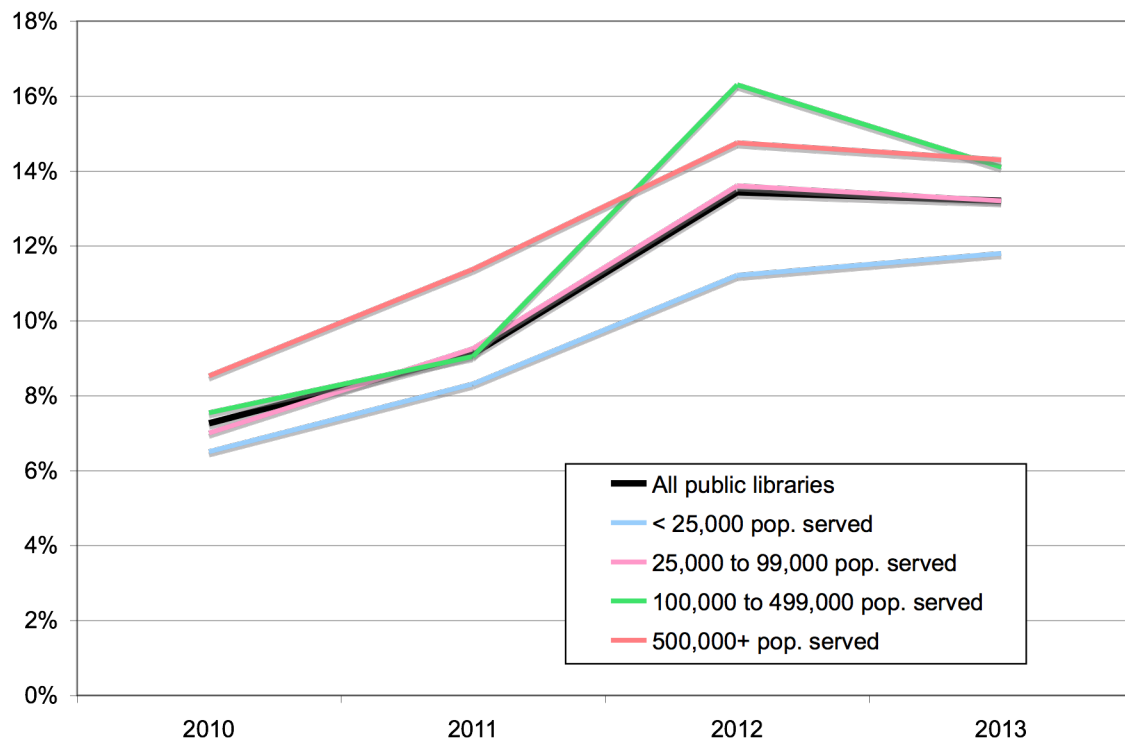
Current Spending

In the current fiscal year (2013), public libraries spent on average $46,943 (median $12,890) on ebooks. Only 1% of respondents said that all ebooks are provided by the state, district, or consortium. (We will look at consortia later in this chapter.)

Figure 52. How much would you estimate your library spent on ebooks for the current fiscal year?
% of public libraries, 2013
Mean: $46,943
Median: $12,890
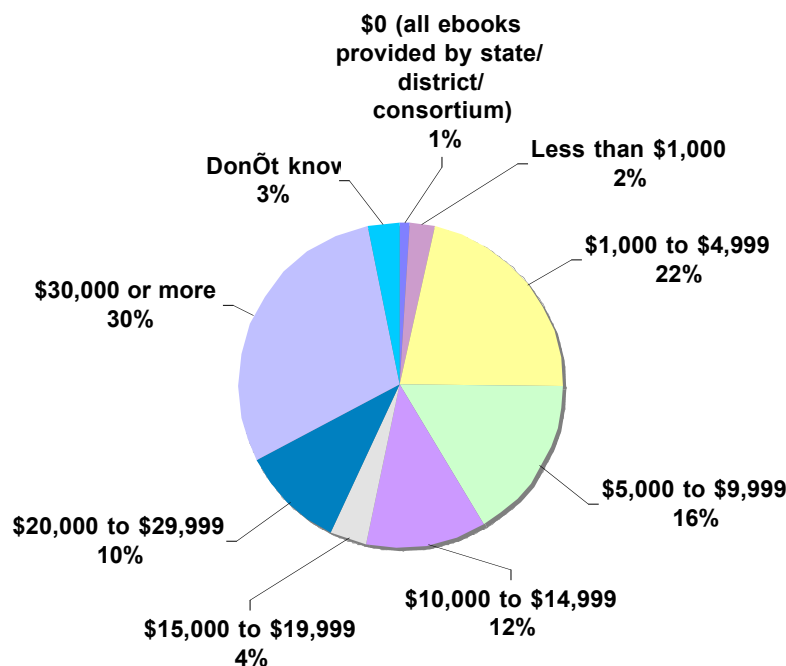
Table 38. How much would you estimate your library spent on ebooks for the current fiscal year?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
$0 (all ebooks provided by state/ district/ consortium)	6%	0%	0%	0%	1%	2%	0%	2%
Less than $1,000	11%	0%	0%	0%	3%	5%	1%	1%
$1,000 to $4,999	57%	20%	4%	0%	21%	43%	18%	12%
$5,000 to $9,999	17%	25%	9%	0%	22%	10%	14%	16%
$10,000 to $14,999	7%	11%	16%	0%	8%	14%	15%	14%
$15,000 to $19,999	0%	10%	2%	0%	7%	0%	5%	2%
$20,000 to $29,999	0%	16%	11%	4%	9%	9%	5%	14%
$30,000 or more	0%	16%	55%	88%	30%	15%	39%	31%
Don't know	3%	2%	4%	8%	0%	3%	3%	7%
Mean	$3,836	$18,084	$56,502	$305,727	$38,414	$13,112	$88,436	$49,415
Median	$3,243	$12,142	$32,333	$39,524	$12,301	$4,942	$15,112	$17,219

We started asking about current spending on ebooks in 2011. Libraries serving populations in excess of 500,000 people spent quite a bit early on, but have tempered their spending. Elsewhere, total spending has remained generally stable for the past two years.

Figure 53: Median spending on ebooks for the current fiscal year
*public libraries by population served, 2011–2013*
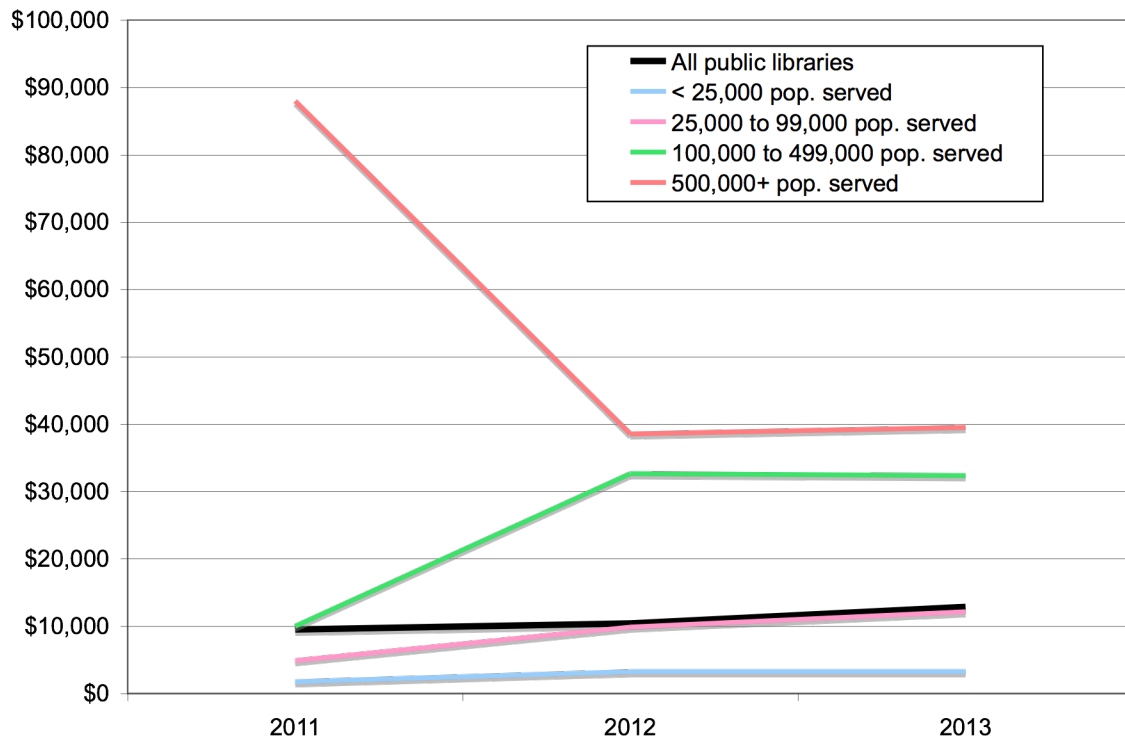
Reallocation of Resources

Although we have asked about the reallocation of resources since our first survey in 2010, we phrased it a little differently this time. In the past, we asked about reallocation of funds from "physical materials formats." This time, we asked if libraries have had to reallocate funds from "other areas," and broke the question into two parts. So when we look at the historical time series in Figure 56, bear this rephrasing in mind.

First, almost two-thirds of public libraries (63%) said that they have had to reallocate funds from other areas of their materials budgets to pay for ebooks.

Figure 54. Have you had to reallocate other areas of your materials budget to pay for ebooks?
% of public libraries, 2013

No
37%

Yes
63%
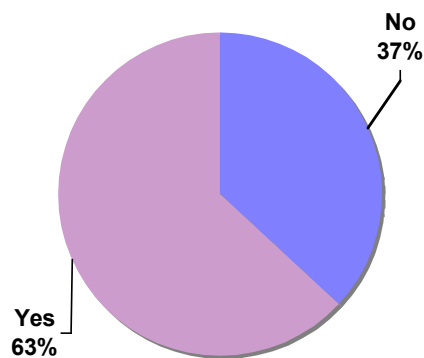
As we perennially find when we ask this question—and found when asked it of school libraries for the first time this year—"print" is somewhat cannibalized by the resource allocation, with one-half of respondents who reallocate funds doing so from the print budget. Seventeen percent reallocate from the reference budget, and 8% take a little from all these areas to pay for ebooks.

**Figure 55. If yes, from what areas or formats?**
% of public libraries, 2013
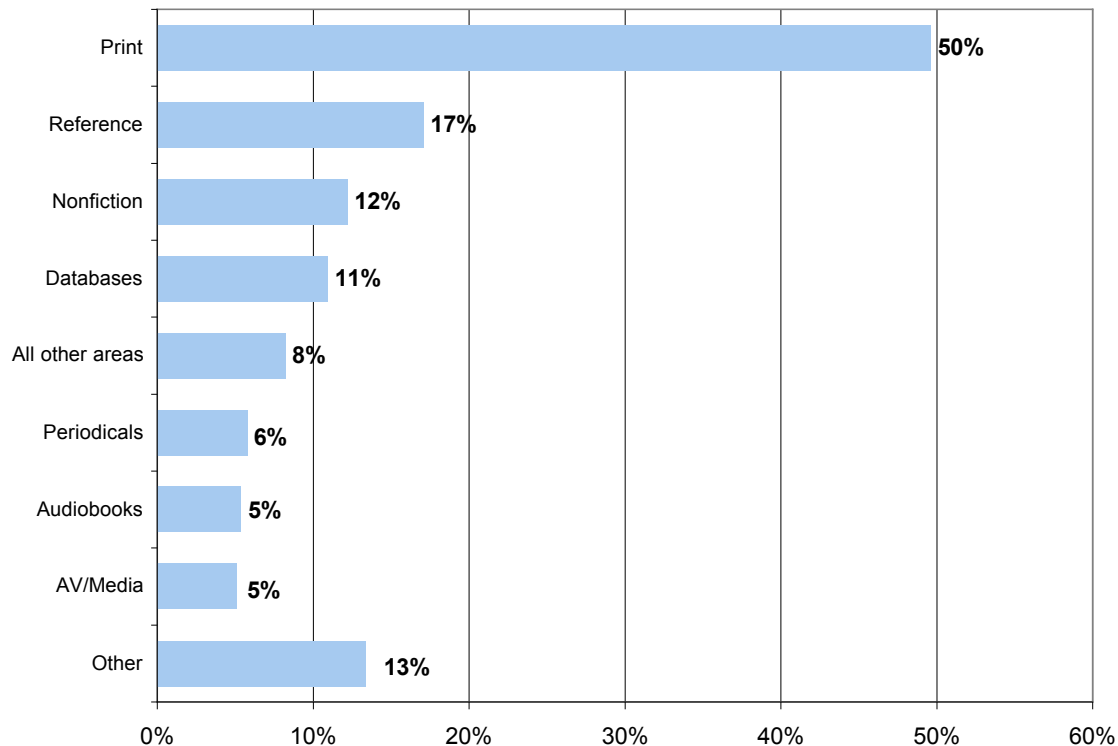
Table 39. If yes, from what areas or formats?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
No	47%	32%	33%	38%	35%	35%	32%	43%
Yes	53%	68%	67%	63%	65%	65%	68%	57%
If yes, from what areas or formats?								
Print	59%	45%	47%	64%	53%	34%	31%	67%
Reference	14%	20%	19%	7%	19%	16%	24%	11%
Nonfiction	5%	8%	25%	0%	11%	7%	18%	14%
Databases	3%	15%	11%	14%	15%	11%	12%	7%
All other areas	3%	10%	11%	7%	5%	19%	11%	3%
Periodicals	0%	10%	6%	0%	11%	0%	11%	0%
Audiobooks	3%	8%	3%	14%	0%	9%	11%	5%
AV/Media	8%	5%	0%	21%	7%	8%	7%	0%
Other	11%	15%	14%	0%	13%	22%	13%	9%

Figure 56. Libraries that have had to reallocate other areas of their materials budget to pay for ebooks*
*% of public libraries by population served, 2013*
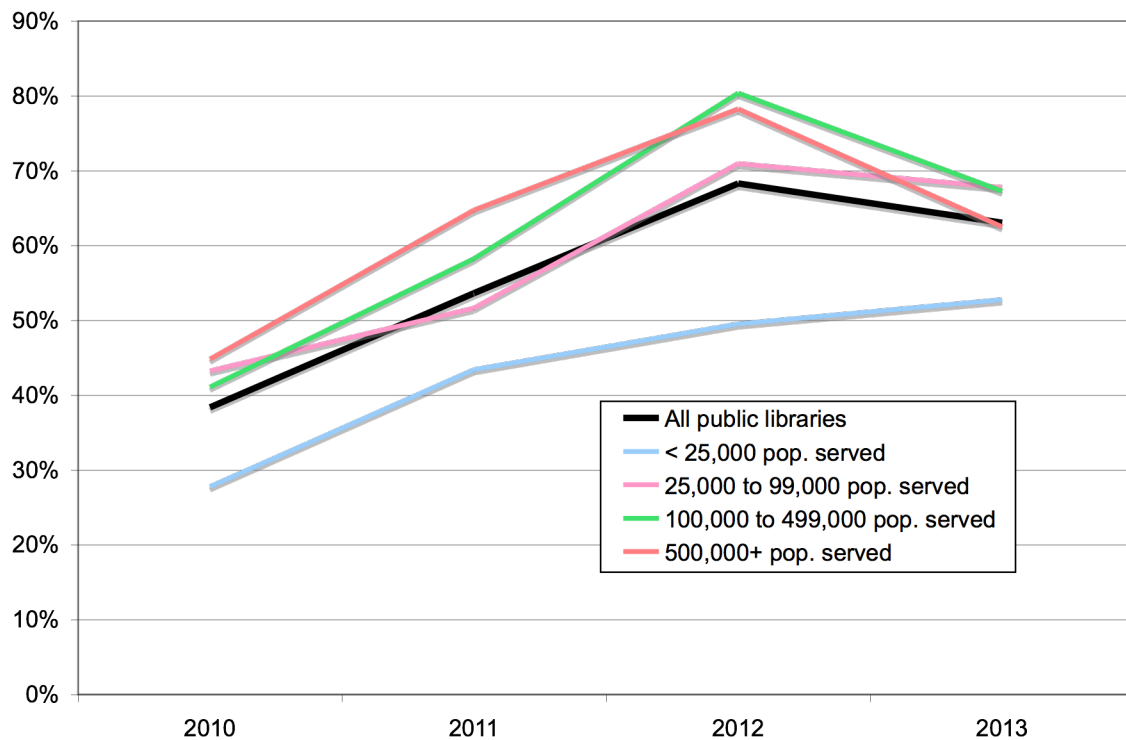
Note: In 2010–2012, "other areas" was phrased as "physical materials formats."

Purchasing Terms

When acquiring ebooks, the majority of libraries—62%—say they "license with a set number of circs," up dramatically from 24% last year. Almost six out of ten (58%) "purchase with perpetual access," up from 48%. Thirty-eight percent of libraries purchase "subscriptions," just about unchanged from last year (37%). Some libraries have to use more than one purchasing scheme, depending upon what a particular vendor will allow. We calculated, however, that 27% of public libraries use a single purchasing term, down two percentage points from last year.

Figure 57. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries, 2013
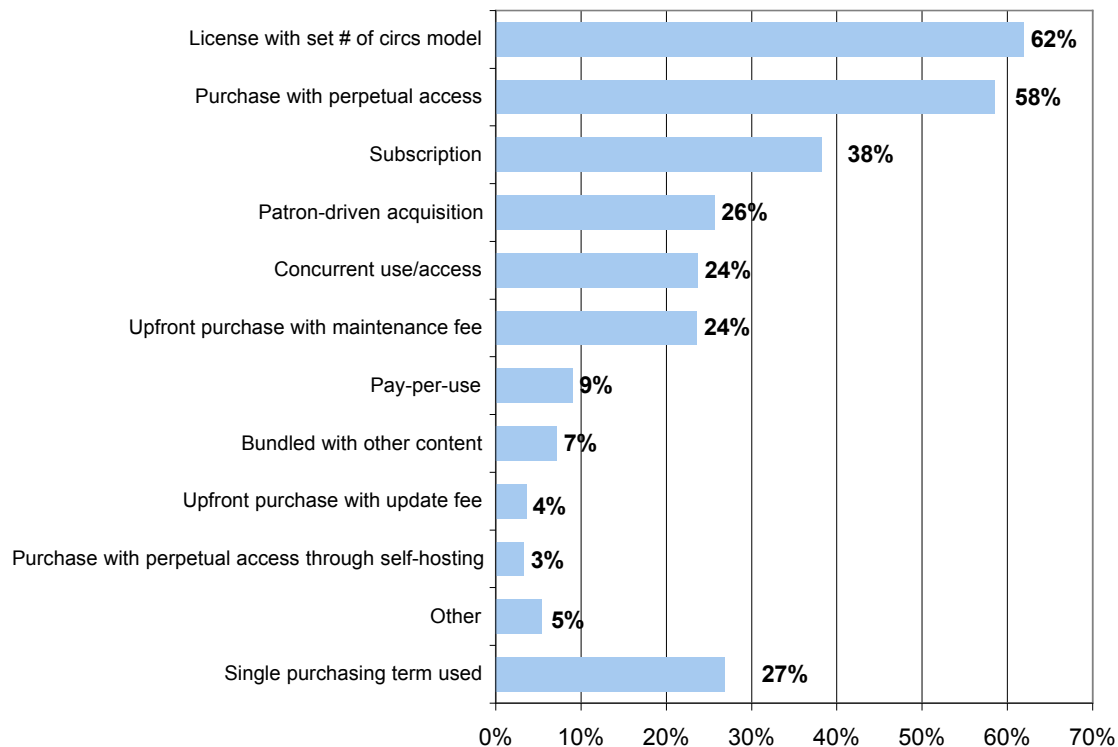
The largest libraries are the most likely to use more than one type of purchasing terms: 50% of small libraries only use one type of purchasing terms vs. 12% of very large libraries.

Table 40. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
License with set # of circs model	31%	63%	76%	76%	62%	49%	63%	68%
Purchase with perpetual access	50%	61%	59%	76%	60%	51%	67%	56%
Subscription	24%	39%	43%	52%	33%	36%	40%	42%
Patron-driven acquisition	29%	24%	24%	24%	26%	41%	25%	16%
Concurrent use/access	10%	24%	26%	56%	16%	27%	38%	21%
Upfront purchase with maintenance fee	13%	24%	30%	24%	19%	23%	21%	31%
Pay-per-use	10%	8%	11%	4%	10%	11%	9%	6%
Bundled with other content	3%	6%	6%	28%	4%	5%	11%	8%
Upfront purchase with update fee	0%	5%	6%	4%	5%	3%	3%	4%
Purchase with perpetual access through self-hosting	9%	0%	4%	4%	2%	3%	2%	6%
Other	13%	6%	2%	0%	4%	12%	9%	1%
Single purchasing term used	50%	27%	17%	12%	31%	32%	19%	25%

The figure below tracks five top purchasing terms over four years of surveys. "License with set number of circs" was added in 2011 when HarperCollins introduced the 26-circ model and has increased substantially since. "User-driven acquisition" has also nearly tripled from 10% to just under 30% of libraries. "Upfront purchase with maintenance fee" has been gradually on the wane.

Figure 58. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries, 2010–2013
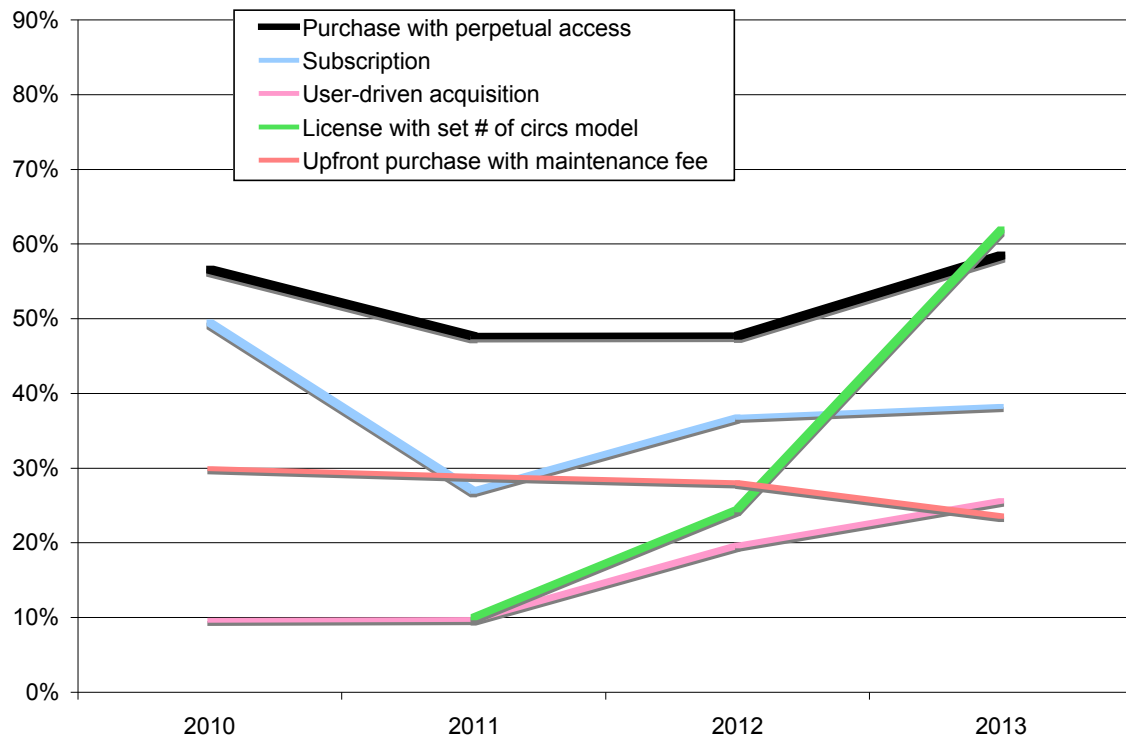
Patron-Driven Acquisition

Last year, we learned from our academic ebook survey of college and university libraries that patron-driven acquisition had quickly become a popular means for libraries to provide the titles that library users actually wanted. That is, the title was purchased as it was requested, which saves a lot of second-guessing and misallocation of resources. This year, we asked this question of public libraries. Have they implemented patron-driven acquisition? Four out of ten (39%) have, while a further 27% are considering it. One-third (34%) currently do not offer patron-driven acquisition.

Figure 59. Does your library use patron-driven acquisition for ebooks?
% of public libraries, 2013
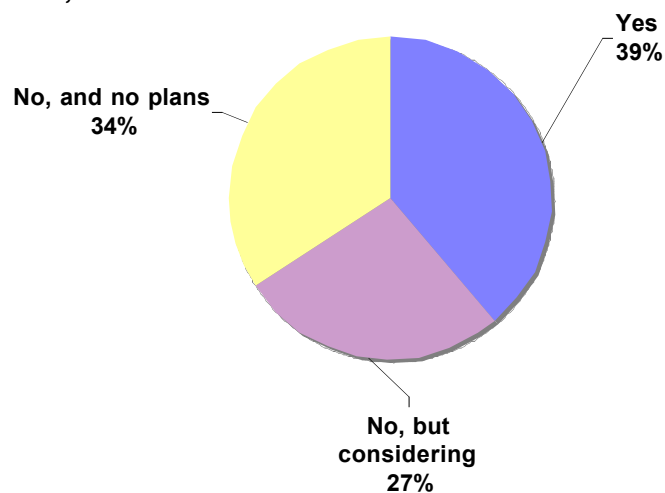
Use of patron-driven acquisition declines as library size increases, likely because large and very large libraries can acquire content via a variety of different purchasing terms.

Table 41. Does your library use patron-driven acquisition for ebooks?
% of public libraries by population served and geographic region, 2013

	Population Served				*Geographical Region*			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Yes	44%	43%	33%	38%	38%	62%	39%	27%
No, but considering	26%	21%	29%	38%	36%	7%	26%	28%
No, and no plans	29%	36%	38%	25%	26%	31%	35%	45%

Consortium Membership

Over the past four years, consortium membership has remained generally constant. This year, 64% said they currently were part of one, and 31% said they were not. Only 2% plan to join one.

Figure 60. Is your library part of a consortium license program for its ebook collection?
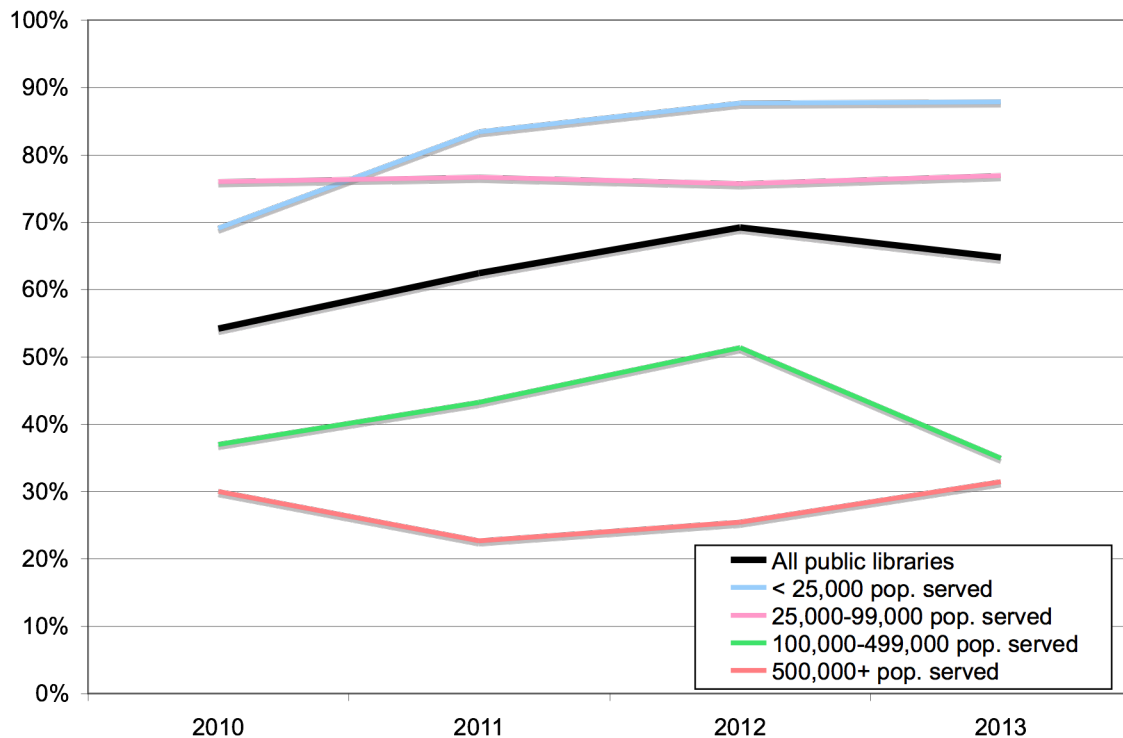*% of public libraries, 2013*
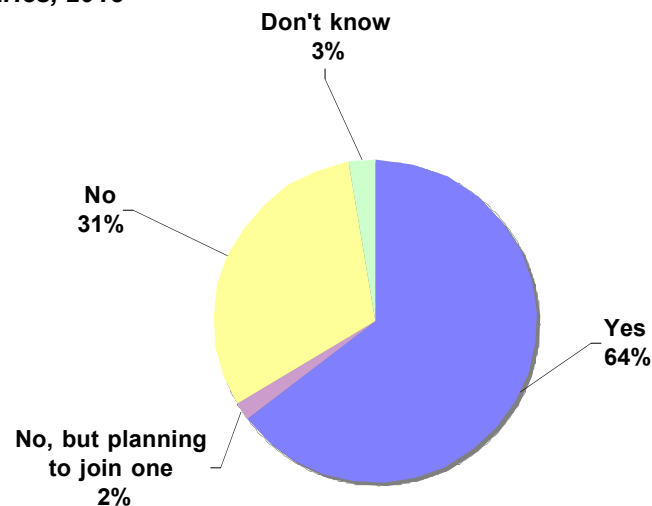
Consortium membership decreases quite dramatically as libraries get larger: 88% of small libraries are members of a consortium, while only 31% of very large libraries are.

Table 42. Is your library part of a consortium license program for its ebook collection?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	88%	77%	35%	31%	78%	89%	44%	47%
No, but planning to join one	1%	2%	3%	0%	4%	2%	0%	0%
No	8%	19%	59%	69%	18%	8%	52%	46%
Don't know	3%	2%	3%	0%	0%	1%	4%	7%

The figure below shows that consortium membership has remained generally constant for all size libraries. As we remarked, it has tended to be a more appealing prospect for smaller libraries.

Figure 61. Yes, library is part of a consortium license program for its ebook collection
% of public libraries by population served, 2010–2013

Consortium Members Buy Ebooks Independently

Of the 64% of public libraries that are part of a consortium, about one-half (49%) buy ebooks independently as well.

Figure 62. If in a consortium, does your library also buy ebooks independently?
% of public libraries that are part of a consortium, 2013
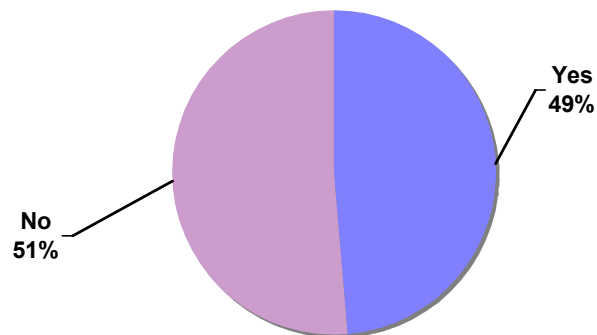
One-third of the 88% of small libraries that are part of a consortium also buy ebooks independently.

Table 43. If in a consortium, does your library also buy ebooks independently?
% of public libraries that are part of a consortium, by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	33%	61%	50%	50%	49%	45%	62%	47%
No	67%	39%	50%	50%	51%	55%	38%	53%

Historically, the number of consortium members that also buy ebooks independently has risen by about ten percentage points in the last three years. Smaller libraries that are part of a consortium are increasing their independent ebook buys while larger libraries are decreasing them.

Figure 63. If in a consortium, library also buys ebooks independently
% of public libraries that are part of a consortium, by population served, 2011–2013
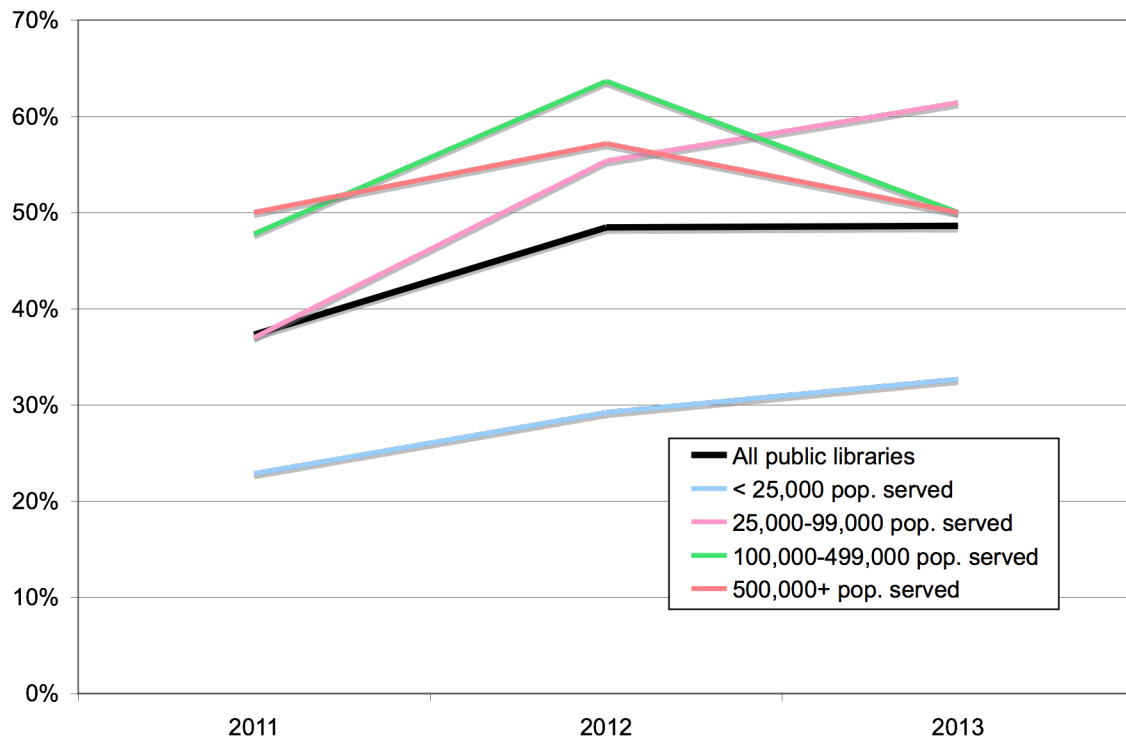
Number of Ebooks Purchased Independently

Public libraries that are part of a consortium *and* who also buy ebooks independently (31% of all libraries) have bought an average of 1,661 ebooks (median 420) outside of the consortium. Last year, the first year we added this question to our survey, the mean number of titles was 1,387 (median 318).

Figure 64: If your library is a consortium member and buys ebooks independently, approximately how many ebooks has your library bought and/or licensed independently?
% of public libraries that are part of a consortium and also buy ebooks independently, 2012–2013
2013—mean: 1,661/median: 420
2012—mean: 1,387/median: 318
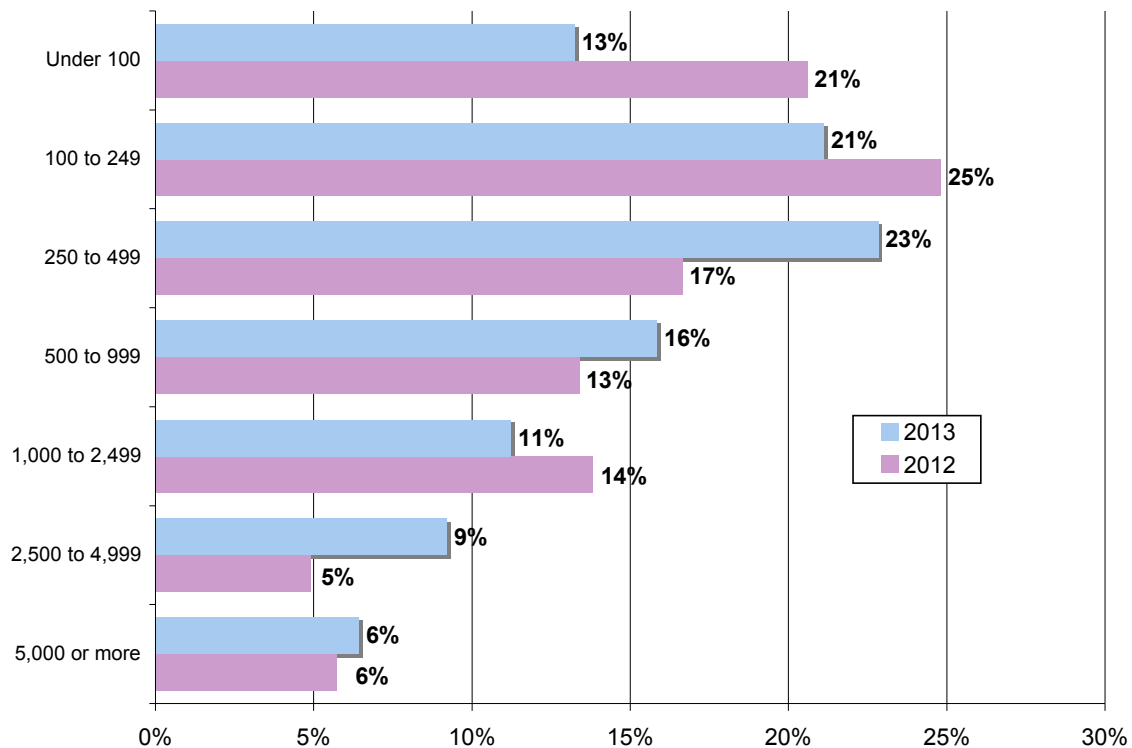
Table 44. If your library is a consortium member and buys ebooks independently, approximately how many ebooks has your library bought and/or licensed independently?
% of public libraries that are part of a consortium and also buy books independently, by population served and geographic region, 2012–2013

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
2013								
Under 100	33%	9%	0%	0%	13%	18%	13%	8%
100 to 249	27%	23%	9%	20%	26%	20%	18%	14%
250 to 499	21%	26%	9%	20%	12%	37%	23%	29%
500 to 999	9%	16%	27%	0%	14%	17%	6%	27%
1,000 to 2,499	3%	14%	18%	0%	15%	4%	23%	0%
2,500 to 4,999	3%	7%	18%	40%	6%	4%	10%	22%
5,000 or more	3%	5%	18%	20%	13%	0%	7%	0%
Mean	634	1,735	2,591	3,110	2,551	572	1,504	1,167
Median	191	420	1,375	3,125	477	333	460	491
2012								
Under 100	44%	19%	7%	0%	25%	29%	10%	13%
100 to 249	31%	31%	16%	0%	22%	32%	28%	17%
250 to 499	13%	15%	24%	0%	14%	11%	21%	26%
500 to 999	5%	20%	9%	0%	23%	10%	6%	4%
1,000 to 2,499	3%	10%	24%	33%	9%	10%	14%	30%
2,500 to 4,999	3%	1%	9%	50%	2%	3%	9%	10%
5,000 or more	2%	4%	11%	17%	6%	4%	13%	0%
Mean	643	747	2,561	6,625	1,340	967	2,243	1,074
Median	130	250	687	3,333	303	196	398	445

In Summary

With the growing demand for ebooks and the increasing size and breadth of ebook collections, libraries are similarly increasing their spending on ebooks, and dedicating steadily larger portions of their materials budgets to acquiring ebooks. Materials budgets are decidedly finite, though, so there is a substantial amount of reallocation taking place, predominantly from print budgets.

As for purchasing terms, "license with set number of circs" has quickly become the most prevalent, if begrudged, although "purchase with perpetual access" remains common. The "subscription" model was never much liked and is waning, but patron-driven acquisition is up-and-coming, as it solves some problems of paying for ebooks that end up not circulating.

Public libraries, particularly small ones, are still relying on consortia for at least some of their ebook purchasing, although given that only 3% of public libraries say they spend $0 themselves on ebooks suggests that they are still heavily involved in purchasing at least some titles outside the consortium.

Libraries are not entirely happy with the purchasing and/or licensing terms that are available to them, but are making do with what they can get, and trying their best to explain to patrons why the ebook loan model doesn't always make logical sense.

As more and more reallocation from print resources to e-resources is taking place, could there come a time when the ebook may be the only version available in libraries? A sad prospect for those who like printed books, but it's a future that needs to be considered. And if a user has no access to those ebooks, where does that leave him or her?

In Their Own Words

- *"Ebooks are a popular format, but the library does not purchase books with limitations such as 1 year or 26 circulations. This limits the availability of titles library patrons would like to read."*

- *"Fair pricing of ebooks is the major deterrent to hosting more content in our eCollection."*

- *"I am very concerned about the adversarial relationship between publishers and libraries, resulting in high cost and limited availability of titles. It would be to the publishers' advantage to come to the table with libraries and map out a feasible business plan."*

- *"I am willing to embrace the HarperCollins model if that means I can purchase bestsellers at a reasonable price."*

- *"I wish the ebook process was more streamlined and more affordable for smaller libraries rather than a consortium with the one book per user model. I keep waiting for an ideal product to begin our own ebook collection, but it seems a long way off. 3M is promising, but doesn't have Kindle compatibility yet. Also, many of our patrons still prefer print and don't own tablets/ereaders despite our efforts to educate. Everything seems in flux right now...I'd love to offer more ebook-wise, but money is the biggest issue."*

- *"It's very frustrating that the publishers and all developing different lending models and not all of them are working with the same vendors. The majority of our users are still using Kindle ereaders, not tablets, and as we cannot afford to pay hosting fees for two platforms we are stuck with OverDrive, which doesn't have the newer Penguin content and is pretty difficult to use. Staff now have to spend so much time explaining to patrons why we can't get a certain title they've requested, why we have some titles by a certain publisher or in a certain series but can no longer get titles by that publisher or in that series. We really need standard lending models and standard formats that work across all devices in order to provide our patrons with the breadth of materials and accessibility that they expect."*

- *"The main issue we have with ebooks is the prices that we have to pay. For a book that we normally would pay $35.00 with a considerable discount, we now pay upwards of $60.00 for the ebook format. This quite a hardship on such a small library as we are. The other difficulty is finding ways in which to promote our ebooks in order to let the community know that we have them and they are available for checkout."*

- *"We offer OverDrive (via a Consortium), the Cloud Library, and Freading for ebooks to our users. They are used in that order of preference, though 3M is growing as more people discover it. I hate the 'expires after x-years' model of licensing. Outrageous prices follow as a distant second. A limited number of circulations is actually my preferred arrangement—the only thing that would make that better to my mind would be to allow simultaneous usage (even to a limited extent, say 5 simultaneous/26 total) within that number. I think we'd actually see our library purchasing more books under that license than we do now."*

- *"I would like to see ownership rather than access alone from OverDrive. Our City Auditor doesn't like the contract we have with OverDrive."*

- *"It still seems unreasonable that ebooks for libraries are so expensive. I understand that in England, they cost no more for libraries than for individuals. I also think it's time for some tech savvy person to come up with software that enables us to do the distribution of these titles, so that we can buy them independently of a company, such as OverDrive, which is frequently very slow to get the titles we want."*

- *"Publisher restrictions and changing rules through OverDrive make this harder than it has to be. Changing prices and leasing access to, rather than owning titles is a problem."*

- *"The Friends of the Library donated the funding to start this. We could not have afforded to do it without them."*

- *"They are very costly per item. Hosting platforms are very expensive. And, of course, the choices are very limited. Many of my patrons do not find material they like."*

- *"Very frustrated at the barriers put in the way which prevent us from purchasing new ebooks, including: Restrictions by publishers (e.g. Hachette will only allow purchases on OverDrive through an Advantage account, not through a consortium); Cost: Publishers agreeing to sell on one platform and not another."*

- *"Very popular with patrons. Challenging to grow both ebook and print collections with same amount of funding available."*

- *"We are very pleased that the big 6 publishers are being more cooperative about making their new titles available to libraries."*

- *"We avoid purchasing ebooks from publishers that impose circulation limits or time limits on down-load rights."*

- *"We started our ebook collection and have funded it in the first three years with nonfiscal funds from our Friends group and through carry-over funds. I imagine that in FY15 we will begin looking at incorporating ebook funds into the fiscal budget."*

5. EBOOKS AND EREADERS

This chapter looks at ereaders, and especially at public libraries that circulate ereading devices.

Each year, we ask about the devices on which library users read ebooks, and the rate at which new devices and models have appeared to some extent makes historical comparison difficult. For example, in our 2010 survey, the options were:

- Library computer
- Personal laptop/Computer/Netbook
- Other portable device
- Dedicated ebook reader

At the time, "dedicated ebook reader" essentially referred to the Kindle or the Sony Reader, both black-and-white devices at the time. The Nook in its monochrome debut format was just coming to market, and the first-generation iPad had just been released.

What a difference three years makes.

Back in 2010, the initial Apple iPad was greeted in some corners with skepticism. Who needed a tablet? Well, given the explosion of the market, a great many people. Last fall, Apple announced that it had sold 100 million iPads to date[11] and since then Samsung, Toshiba, Dell, Sony—just about everyone who's anyone in the consumer electronics space has released a tablet. Amazon tabletized the Kindle, the Kindle Fire, and Barnes & Noble has the Nook Tablet[12]. And tablets like the iPad can run apps that let users read Nook, Kindle, and other ebook formats on their own devices. The computer or netbook is also not dead; Google and Samsung recently released the Chromebook, a thin, fast, inexpensive portable computer. For consumers looking to explore ebooks, the plethora of devices and platforms has led to confusion and a fragmented market. For libraries, the challenge has been to get their ebook platforms to play nice with these diverse devices and apps, as well as choose an appropriate format.

Let's see how things have changed since 2010.

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[11] T.C. Sottek, "Apple has sold 100 million iPads," The Verge, October 23, 2012, http://www.theverge.com/2012/10/23/3543726/apple-has-sold-100-million-ipads.
[12] Portending a shakeup in the ereading table market, perhaps, Barnes & Noble's Nook, which got off to a great start upon its launch, took a nosedive, leading the company to cease manufacturing the devices and leaving further Nook developments to a third-party. Aaron Souppouris, "Barnes & Noble gives up on making its own Nook tablets with third-party licensing deal," The Verge, June 25, 2013, http://www.theverge.com/2013/6/25/4462272/barnes-noble-nook-tablet-third-party-partnership-model.

Ereaders Used

What devices are used by library patrons to read ebooks? In our most recent survey, 86% of public libraries said that their patrons use some kind of dedicated ebook reader like a Kindle or a Nook, while 82% say patrons use a tablet like an iPad. Just over one-half report the usage of a smartphone or other mobile device such as an iPod Touch.

Figure 65. What device(s) do your library users most often use to read circulating/trade ebooks?
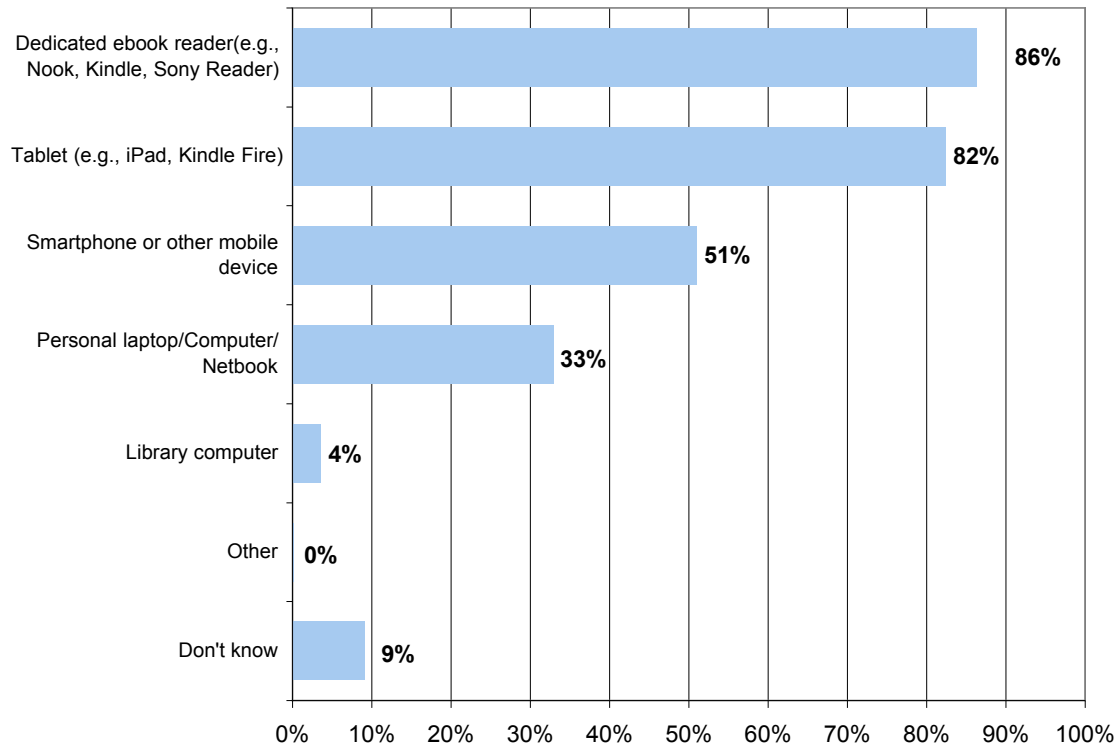*% of public libraries, 2013*

Table 45. What device(s) do your library users most often use to read circulating/trade ebooks?
% of public libraries by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Dedicated ebook reader(e.g., Nook, Kindle, Sony Reader)	87%	92%	76%	91%	87%	91%	86%	84%
Tablet (e.g., iPad, Kindle Fire)	75%	89%	78%	86%	84%	91%	76%	81%
Smartphone or other mobile device	36%	59%	52%	69%	58%	35%	48%	55%
Personal laptop/Computer/Netbook	27%	37%	35%	31%	34%	31%	40%	28%
Library computer	3%	2%	6%	6%	4%	3%	3%	5%
Other	1%	0%	0%	0%	0%	0%	0%	1%
Don't know	6%	4%	17%	9%	9%	1%	10%	13%

Since 2010, the dedicated ereader has generally replaced the personal laptop/computer/netbook, with tablets (added as a category of their own in 2012) quickly becoming almost equal in popularity. The use of smartphones as an ereading device is generally on the upswing, as well. The library computer was never especially popular, except perhaps for those who do not have their own ereaders and whose libraries do not circulate ereaders, but has become even less so. It is also worth noting that the percentage of respondents who said they "don't know" dropped from 16% in 2010 to 4% in 2013.

Figure 66. What device(s) do your library users most often use to read circulating/trade ebooks?
% of public libraries, 2010–2013
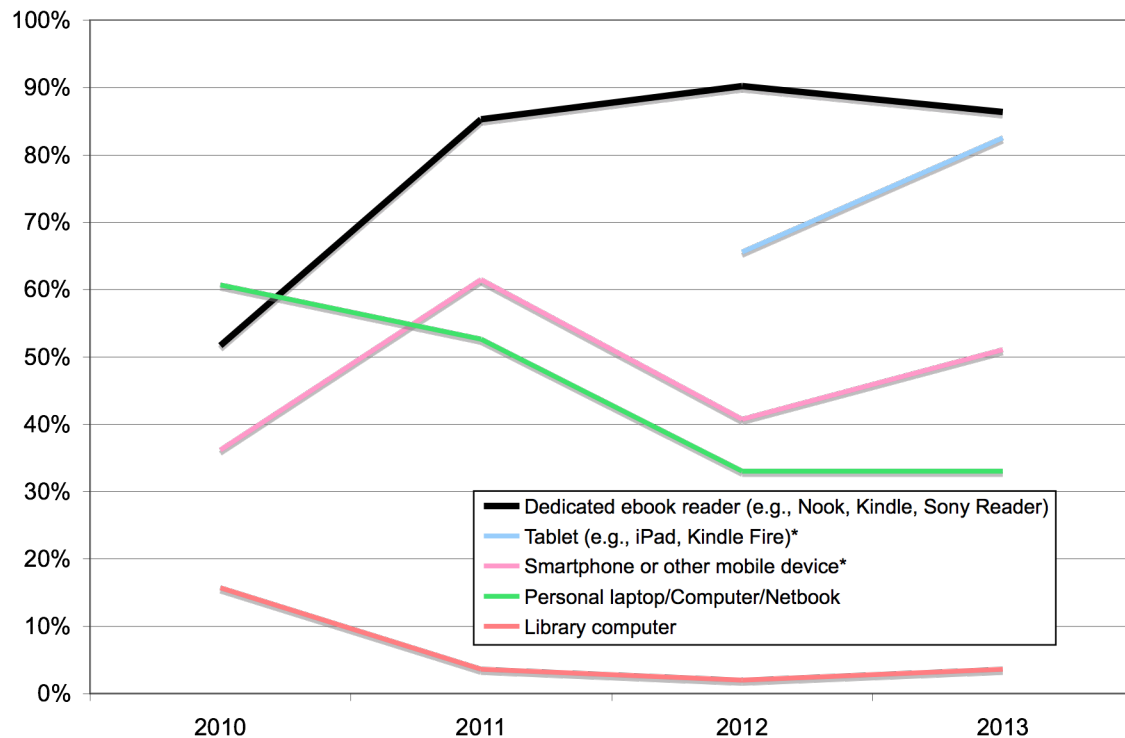
Note: In 2010 and 2011, tablet (like iPad) and smartphone (like iPhone) listed as "other portable device."

Availability of Reading Devices

A perennial question in our survey is whether libraries have ereaders available for patrons to read ebooks. In 2013, 40% said they do, with 25% making them available for take home use. Still another 21% are considering it, but 39% don't circulate ereaders and have no plans to do so. As Figure 68 on the next page shows, this is quite a jump from 2010, when only 7% of public libraries circulated ereaders at all.

Table 46 shows that the very largest libraries are the least likely to provide ereading devices to patrons.

Figure 67. Does your library have ereading devices available for patrons to borrow?
% of public libraries, 2013
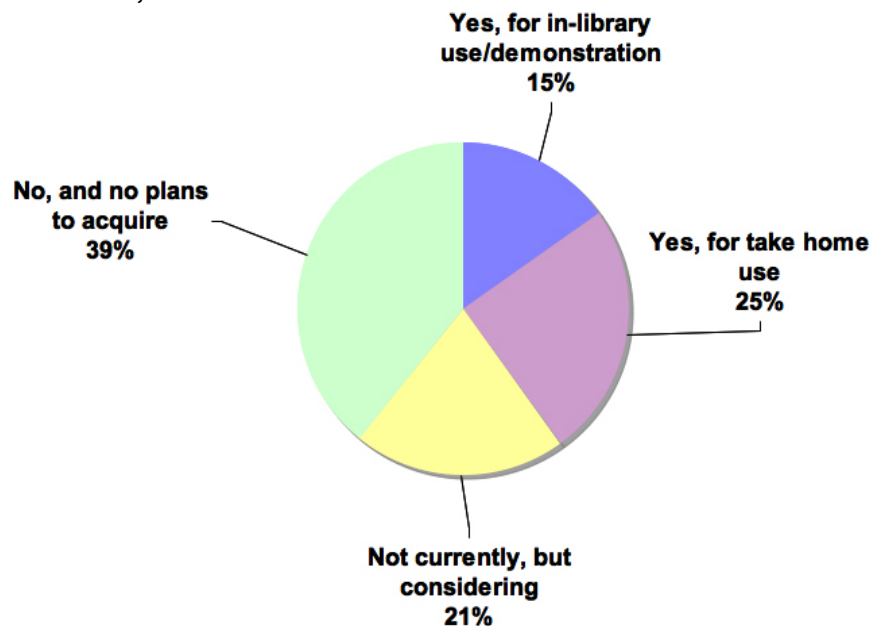
Table 46. Does your library have ereading devices available for patrons to borrow?
% of public libraries by population served and geographic region, 2013

	Population Served				*Geographical Region*			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
NET YES	36%	37%	38%	29%	39%	43%	39%	30%
Yes, for in-library use/demonstration	14%	16%	19%	6%	18%	14%	9%	21%
Yes, for take home use	27%	29%	21%	23%	29%	35%	38%	9%
Not currently, but considering	32%	22%	16%	17%	28%	18%	19%	20%
No, and no plans to acquire	32%	41%	49%	54%	34%	39%	42%	52%

Libraries across the board have ramped up the availability of hardware ereaders for users to borrow.

Figure 68. Libraries that circulate ereaders for in-library or home use
% of public libraries by population served, 2010–2013
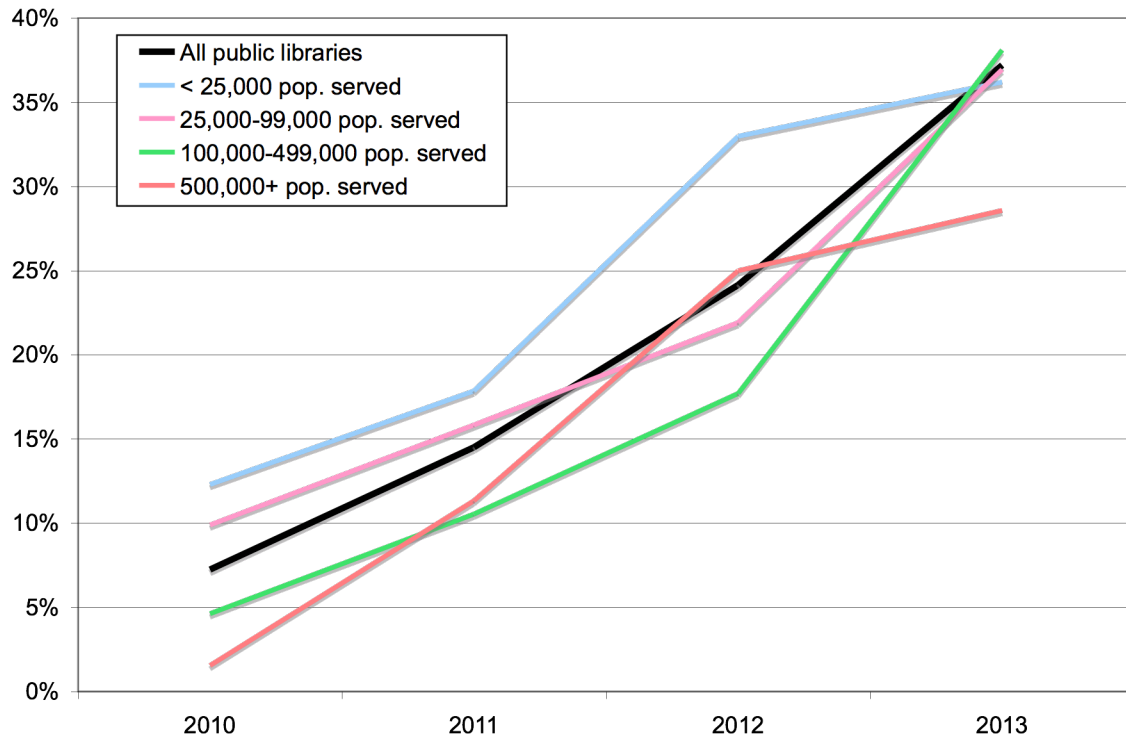
Which Ereaders Do Libraries Circulate

Of the 40% of public libraries that circulate ereaders to patrons, the Kindle and the Nook are the top two devices circulated, offered by 57% and 56% of libraries, respectively. The iPad or iPad Mini is circulated by 47%.

Figure 69. If yes, which ereading device(s) does your library currently have available?
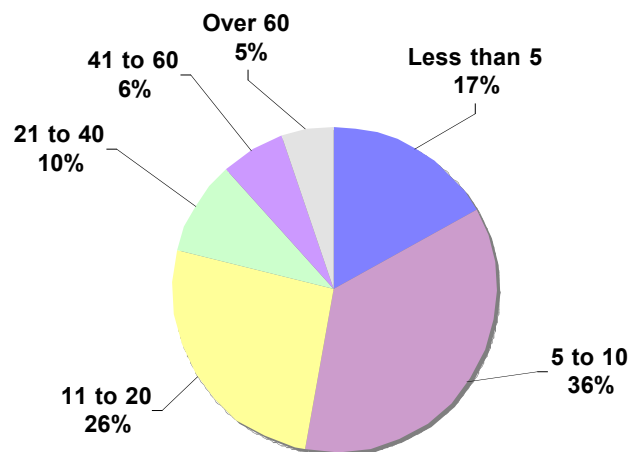*% of public libraries that circulate ereaders, 2013*
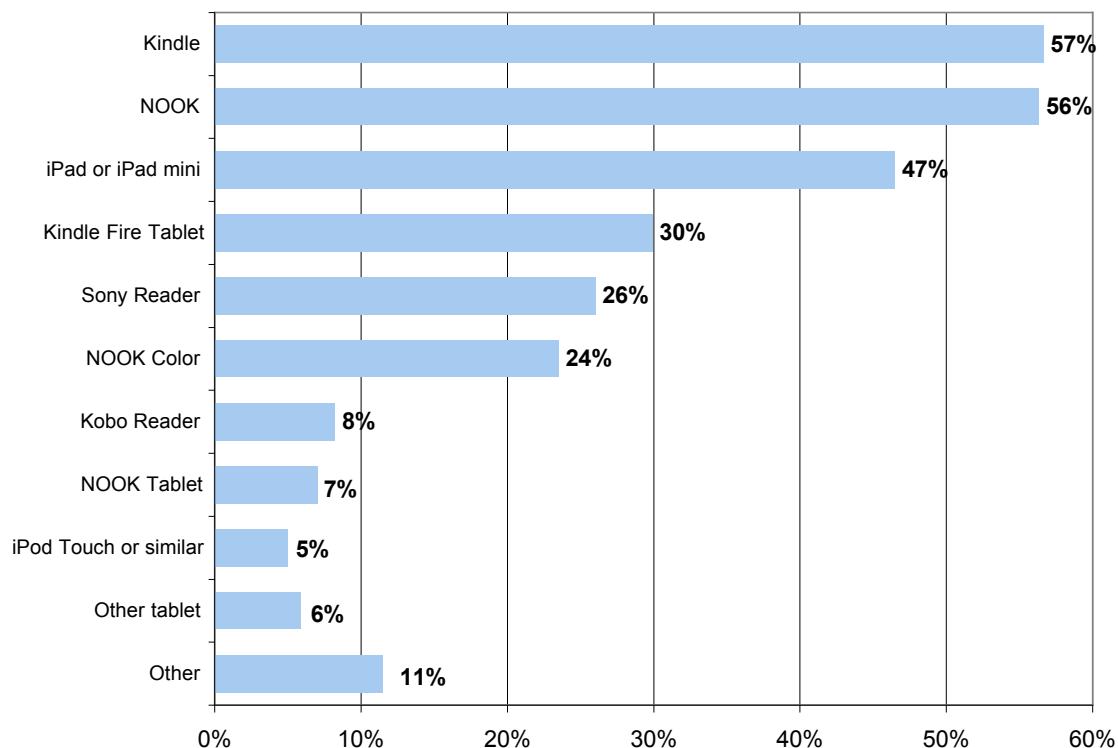
Table 47. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Kindle	71%	62%	36%	30%	60%	66%	42%	53%
NOOK	62%	50%	55%	50%	49%	62%	61%	57%
iPad or iPad mini	33%	50%	55%	30%	43%	46%	40%	62%
Kindle Fire Tablet	26%	38%	23%	20%	29%	28%	12%	52%
Sony Reader	21%	32%	18%	30%	38%	20%	5%	31%
NOOK Color	24%	26%	18%	20%	29%	23%	9%	31%
Kobo Reader	10%	9%	9%	0%	5%	7%	5%	18%
NOOK Tablet	7%	3%	9%	20%	4%	6%	0%	21%
Other tablet	5%	15%	0%	0%	8%	9%	5%	0%
iPod Touch or similar	2%	9%	0%	10%	7%	4%	2%	6%
Other	5%	12%	23%	0%	9%	2%	37%	0%

Pity the Sony Reader. The first successful ebook reader on the market is gradually becoming a footnote to the Kindle, the Nook, and especially tablet computers like the iPad.

Figure 70. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, 2010–2013
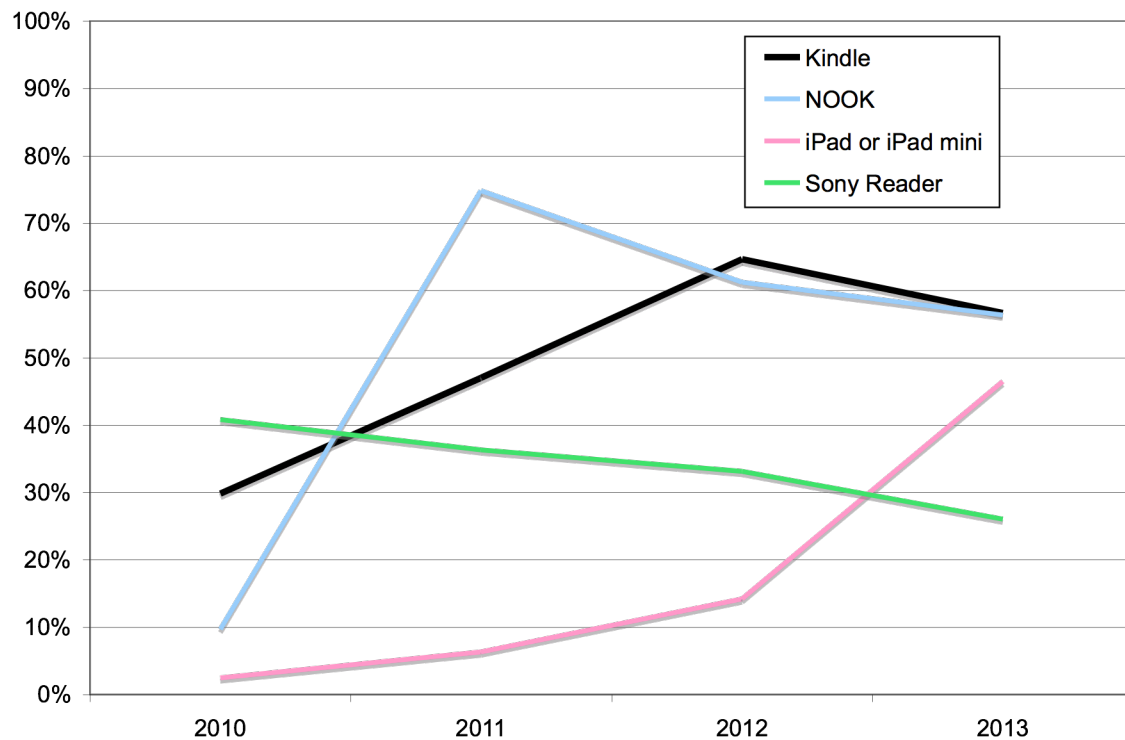
Note: Figures do not include Kindle Fire, Nook Color, or Nook Tablet.

How Many Ereaders?

Of the 40% of libraries that circulate ereaders, they have, on average, 20 devices on hand (median 10).

Figure 71. If yes, how many ereading devices does your library have available to borrow?
% of public libraries that circulate ereaders, 2013
<u>**Mean: 20**</u>
<u>**Median: 10**</u>

Table 48. If yes, how many ereading devices does your library have available to borrow?
% of public libraries that circulate ereaders, by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Less than 5	47%	10%	0%	0%	23%	27%	8%	0%
5 to 10	34%	47%	24%	13%	38%	49%	22%	25%
11 to 20	11%	30%	41%	0%	22%	15%	28%	53%
21 to 40	8%	7%	12%	25%	4%	7%	23%	8%
41 to 60	0%	3%	18%	13%	9%	0%	13%	0%
Over 60	0%	3%	6%	50%	3%	2%	6%	15%
Mean devices	7	14	26	116	15	13	32	30
Median devices	5	9	16	107	9	7	15	15

The number of ereading devices made available to library patrons has increased, if not dramatically, since we began asking this question in 2011. In 2011, for all libraries, the median number of available devices was 6; in 2013, it was 10. The largest libraries now have in excess of 100 devices to loan out.

Figure 72. Median number of ereading devices library has available to borrow
public libraries that circulate ereaders, by population servced, 2011–2013
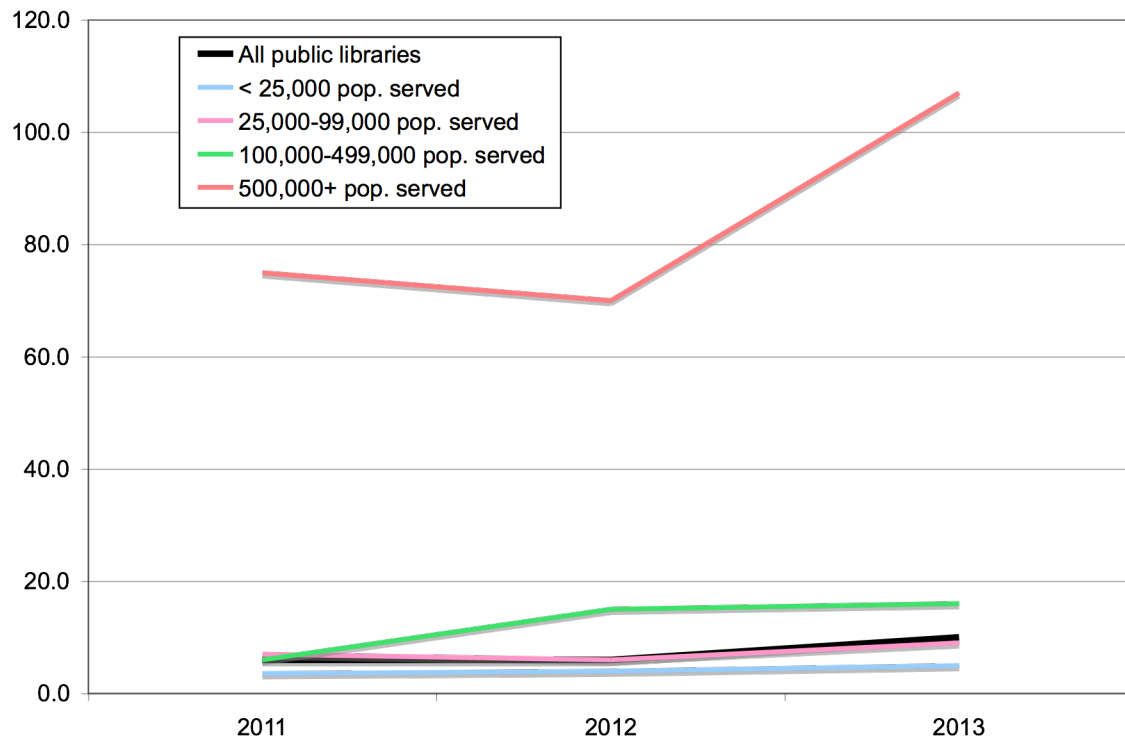
We added a follow-up question on our 2013 survey asking for whom the ereading devices were intended—adults or kids. Generally speaking, the devices are for adults. Virtually all of our respondents (98%) said their targeted users are adults. (Recall that one of the "killer apps" for ebooks is the ease of enlarging the type for older eyes.) Teens and young adults are a secondary target user group, selected by 57% of respondents. Children are the targeted users for only 39% of public libraries.

Figure 73. If yes, who are the intended users of your ereading devices? *(multiple responses permitted)*
% of public libraries that circulate ereaders, 2013
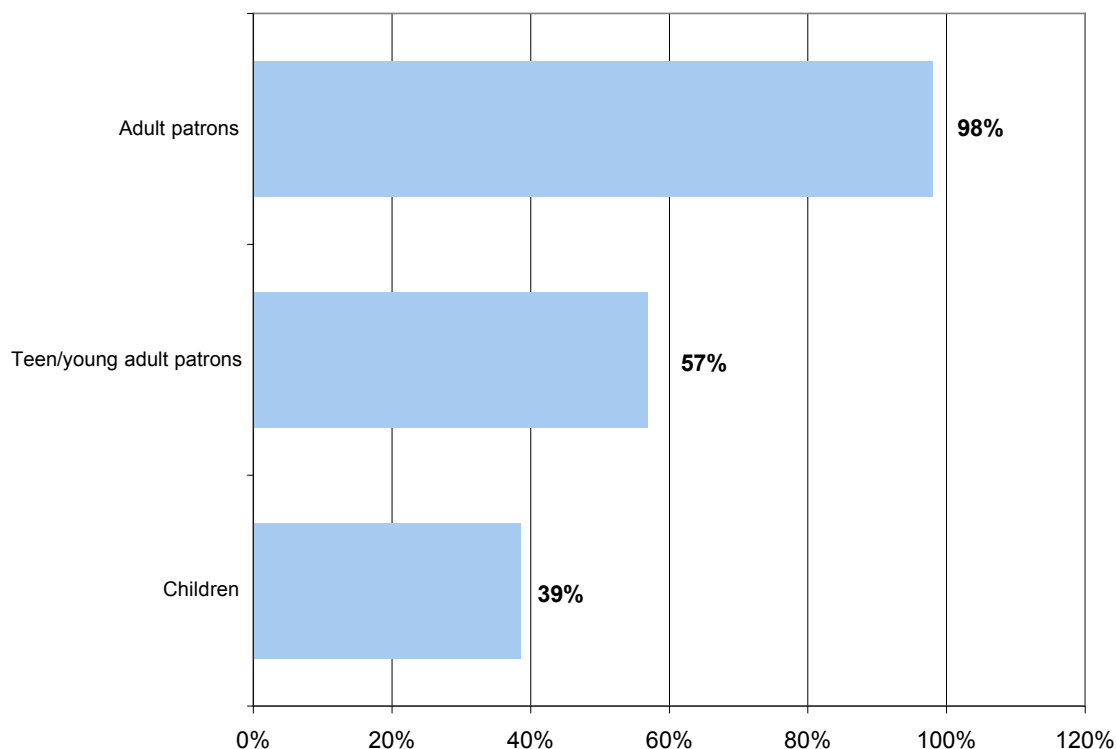
Table 49. If yes, who are the intended users of your ereading devices?
% of public libraries that circulate ereaders, by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Adult patrons	98%	100%	95%	100%	100%	100%	97%	92%
Teen/young adult patrons	63%	56%	55%	50%	64%	33%	76%	54%
Children	44%	38%	30%	40%	44%	24%	39%	48%

Preloaded Ereaders

Last year, we added a follow-up question about whether the circulated ereaders were preloaded with ebooks or if users could download their desired titles themselves. Of the 40% of public libraries that circulate ereaders, 55% preload them with ebooks, although this is down from 64% last year. One in five (21%) allows borrowers to download their own ebooks, which is up from 16% last year. The number of libraries allowing a "mixture of both" is up four points to 24%. Preloading ebooks does help with the "ease of use" challenges we saw in Chapter 3.

Figure 74. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
% of public libraries that circulate ereaders, 2012–2013
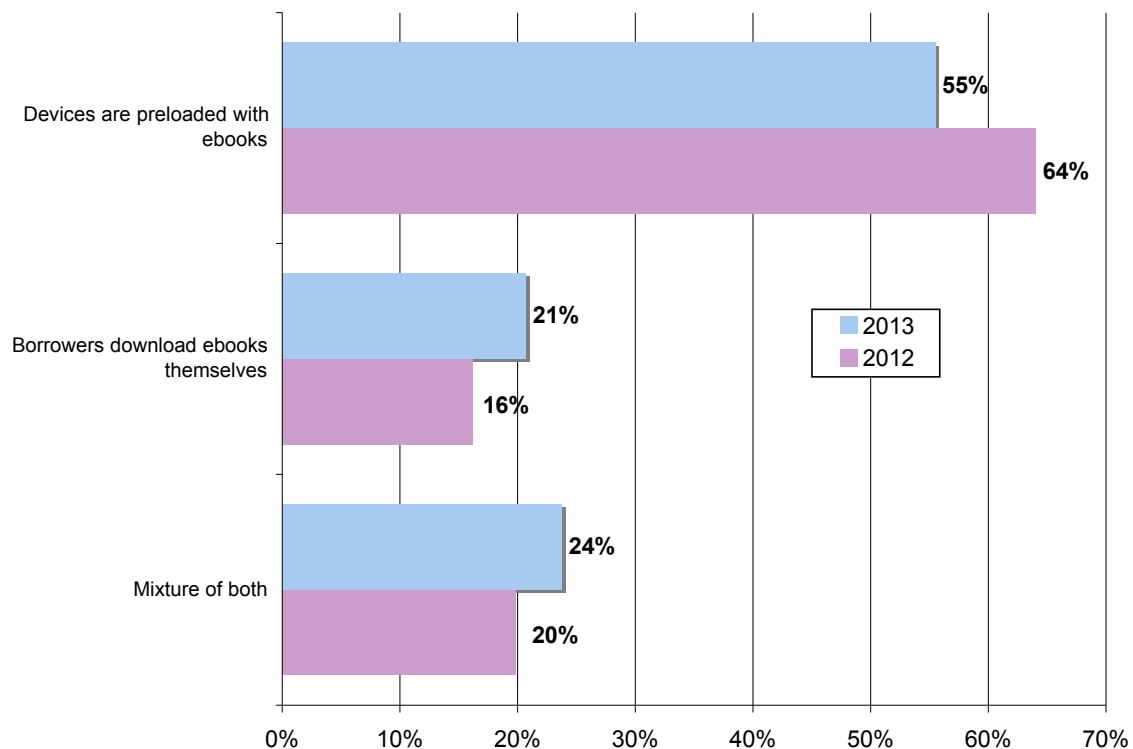
Table 50. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
% of public libraries that circulate ereaders, by population served and geographical region, 2012–2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2013								
Devices are preloaded with ebooks	58%	52%	53%	75%	51%	72%	59%	40%
Borrowers download ebooks themselves	11%	23%	32%	25%	26%	6%	16%	40%
Mixture of both	32%	26%	16%	0%	24%	22%	25%	20%
2012								
Devices are preloaded with ebooks	61%	74%	60%	50%	67%	74%	46%	62%
Borrowers download ebooks themselves	15%	13%	20%	50%	16%	11%	21%	13%
Mixture of both	25%	13%	20%	0%	18%	15%	33%	25%

Preloaded Apps

Last year, we found that 34% of libraries that offer tablets for loan preload them with educational apps or enhanced ebooks. This year, of the libraries that circulate tablets, that percentage has dropped slightly to 27%. Fewer libraries are considering it this year, as well.

Figure 75. If your library has tablets, do you load any of the following educational apps or enhanced ebooks on your library's tablets?
*% of public libraries that circulate tablets, 2012–2013*
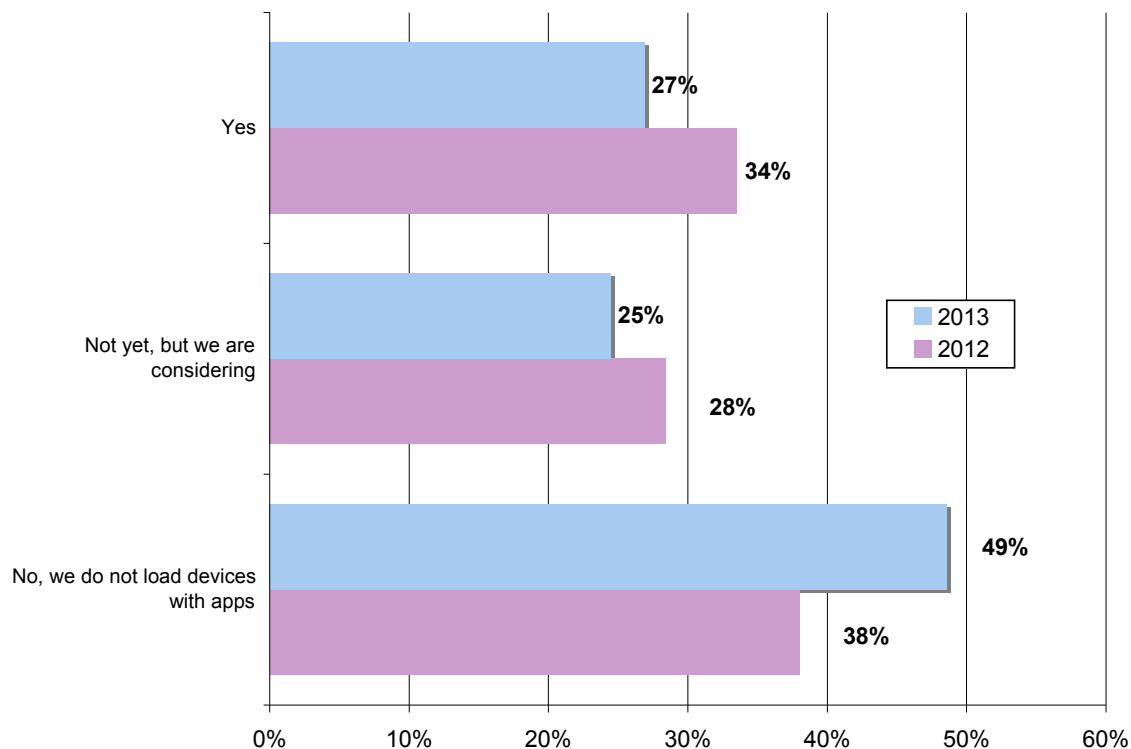
Table 51. If your library has tablets, do you load any of the following educational apps or enhanced ebooks on your library's tablets?
% of public libraries that circulate tablets, by population served and geographical region, 2012–2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2013								
Yes	33%	25%	25%	25%	31%	21%	28%	28%
Not yet, but we are considering	28%	20%	25%	25%	19%	40%	44%	6%
No, we do not load devices with apps	39%	55%	50%	50%	51%	40%	29%	66%
2012								
Yes	35%	43%	33%	0%	10%	44%	49%	0%
Not yet, but we are considering	18%	43%	33%	0%	21%	35%	28%	0%
No, we do not load devices with apps	47%	14%	33%	100%	69%	22%	23%	0%

Ereaders in the OPAC

This year's survey asked if libraries' online public access catalogs (OPAC) include ereading devices in search results. Most libraries (67%) say their OPAC returns ereading devices in search results. Twenty-seven percent of libraries are not even considering this feature, likely because of the complexity of adding it, or their ebook OPAC is hosted by a third party outside the library.

Figure 76. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, 2013
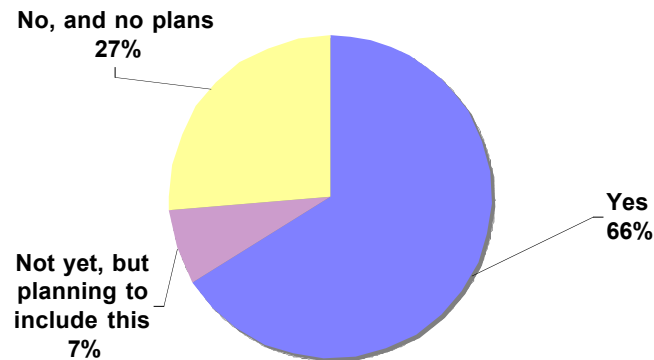
Libraries in the South look to be an outlier in this question, although we are unable to come up with any explanation other than a statistical anomaly.

Table 52. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, by population served and geographic region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	76%	76%	38%	80%	73%	76%	73%	35%
Not yet, but planning to include this	5%	6%	14%	0%	7%	8%	10%	5%
No, and no plans	19%	18%	48%	20%	19%	16%	17%	60%

Ereader Plans for the Future

Of those public libraries that do offer and circulate ereaders (40% of all public libraries), 59% say they have no plans to acquire more devices, although 26% say they plan to buy more tablets. Nineteen percent plan to buy more dedicated ereaders. Seven percent said they plan to replace broken devices.
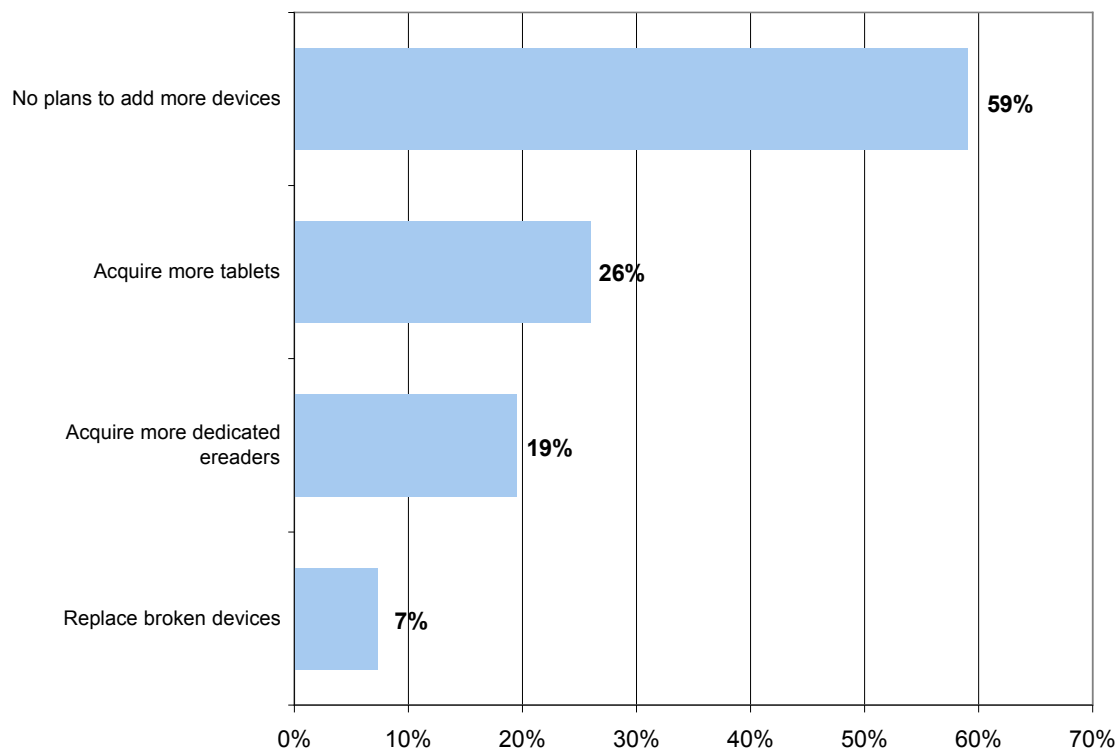
Figure 77. If your library currently has ereading devices, what are your plans for library-owned ereading devices in the next year?
% of public libraries that circulate ereaders, 2013

Table 53. If your library currently has ereading devices, what are your plans for library-owned ereading devices in the next year?
% of public libraries that circulate ereaders, by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Acquire more dedicated ereaders	21%	24%	14%	10%	27%	21%	26%	0%
Acquire more tablets	29%	21%	27%	10%	26%	31%	39%	7%
Replace broken devices	7%	6%	5%	30%	4%	8%	16%	5%
No plans to add more devices	60%	58%	64%	60%	61%	54%	30%	88%

In Summary

The Kindle and Nook are still the primary ereading devices provided by libraries, but tablets are gaining ground. Public libraries are increasing the circulation of ereaders to library patrons, even if they aren't dramatically increasing the number of physical devices they own. Mid-size to small size libraries are most likely to provide ereading devices to patrons. However, the largest libraries (500,000+ population served) increased their number of devices considerably in the last year. More than half the time, borrowed devices are preloaded with titles.

Discoverability of ebooks is simplified when ebooks are included in the general catalog, and three-quarters of library OPACs have this functionality. Of those libraries that also offer ereaders, 67% include ereading devices in catalog search results.

The devices libraries offer are generally intended for adult use (72% of library ebooks are adult books, after all). However, of those that offer ereading devices, over half provide for teen use and a third for children's.

In Their Own Words

- *"A parent or guardian must checkout the teen and children ereaders."*

- *"Adults must check out the YA and Children devices for their children."*

- *"Only adults can check out ereaders, laptops, and tablets but many adults check them out and then let their children use them."*

- *"Our library system is just taking off with providing ereader training, ereader access for checkout as well as bundling ebooks for book club ereaders."*

- *"We use OverDrive for our ebooks and patrons are sometimes frustrated by the long wait times for an ebook as we are part of a consortium. The interface to download the books frustrates patrons and we have to help them almost daily. We would like to have a different model to purchase ebooks."*

- *"Many of our older patrons get frustrated learning how to download books. Some devices are easier to use than others, and we find Kindle the most user-friendly."*

- *"We are piloting 3M readers at one branch."*

- *"We are about to begin circulating Nooks (for home use) and iPads (for in-library use), June/July 2013."*

- *"Too many people don't have a clue on how to run their device."*

- *"We are a very small public library and are experimenting with checking out pre-loaded Kindles. Several ebook loaning consortiums are in development in our local area; I'm collecting information on this as I'm cautiously interested but not sure that our budget will support joining such an effort."*

- *"We are still learning about the system, but so far our biggest problem has been with patrons finding a title to read only to discover that it will not download to their particular device because the file type is incompatible."*

- *"We have just gotten two ebook readers through a grant. We are now in the process of deciding how much access patrons will have and what our lending policy will be. Some of the answers to these questions will likely change in the next two months."*

GENERAL CONCLUSIONS AND TRENDS

The trends we have been tracking in public libraries vis-à-vis ebooks mirror what has been happening elsewhere in the culture. At the end of 2012, the Pew Internet & American Life Project released a report on ereading[13] and among their conclusions they found:

- In the past year (2011–2012), 23% of all Americans ages 16 and older read ebooks, increasing from 16% a year earlier.

- Meanwhile, 67% read printed books, decreasing from 72%.

- Still, we take our victories where we can find them: "overall, the number of book readers in late 2012 was 75% of the population ages 16 and older, a small and statistically insignificant decline from 78% in late 2011."

There has been evidence, which we have cited in previous reports in this series, that the rise of ebooks has helped stave off a decline in reading books at all, especially among young adults. After all, the competition to print books isn't necessarily ebooks; it is other forms of media, such as TV, the Internet, social media, video games, etc.

As more and more people have obtained ereaders—either on their own or as gifts—they have explored the world of ebooks. Says the Pew report:

> The move toward e-book reading coincides with an increase in ownership of electronic book reading devices. In all, the number of owners of either a tablet computer or e-book reading device such as a Kindle or Nook grew from 18% in late 2011 to 33% in late 2012. As of November 2012, some 25% of Americans ages 16 and older own tablet computers such as iPads or Kindle Fires, up from 10% who owned tablets in late 2011. And in late 2012 19% of Americans ages 16 and older own e-book reading devices such as Kindles and Nooks, compared with 10% who owned such devices at the same time last year.

One logical place to begin to experiment with ebooks is the public library. And, of course, not everyone can afford an ereading device, so libraries do a very great service when they supply ereading devices and help get patrons inured to the technology. The Pew report says:

> This move toward e-books has also affected libraries. The share of recent library users who have borrowed an e-book from a library has increased from 3% last year to 5% this year.

The printed book is not going away—one hopes—but changes in the publishing industry and the rise of independent and self-publishing, while small potatoes today, may take off, and important voices and important content may someday only be available in electronic format. At the same time, the production considerations of ebooks are such that there is no practical need for there to be any minimum (or even maximum) page length, as is required in the print world.

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[13] *E-book Reading Jumps; Print Book Reading Declines*, Pew Internet & American Life Project, 2012, http://libraries.pewinternet.org/2012/12/27/e-book-reading-jumps-print-book-reading-declines/.

Stephen King was a pioneer in e-novellas and e-short stories, and it seems likely that more electronic-only content will be appearing. Should not library patrons have access to this content?

But as we saw in Chapter 3 of this report, libraries don't have easy access to this content, even if they desire it, thanks to challenges in getting certain types of content to "play nice" with current ebook platforms—be it the library's own, a consortium's, or a vendor's.

Hot, Cold, and Lukewarm Trends

What can we identify as the trends to watch—and the trends that have played themselves out?

Hot Trends

- General public becoming more ebook savvy.

- Children growing up in an electronic world will be more used to reading on devices rather than paper.

Lukewarm Trends

- General economic conditions and stubbornly high unemployment will keep many consumers from being able to acquire ereaders or develop interest in ebooks.

- Ebook demand has slowed; may have "peaked" in public libraries, barring another surge. Pew data suggest only 5% of library users download ebooks, which means potential untapped demand could still exist.

- Format wars will continue, with users having their favored devices: Kindle vs. Nook vs. tablets. The fate of the Nook is uncertain, but the explosive growth of tablets may make dedicated ereaders beside the point.

- Ease of use challenges will continue to decline—slowly—while ebook title availability issues will continue to rise.

Cold Trends

- Ebook penetration into academic libraries. Been there, done that.

APPENDIX: PUBLIC LIBRARIES METHODOLOGY AND QUESTIONNAIRE

The Survey Methodology

The present report is one-half of an overall study that included school libraries in addition to public libraries. (We discontinued a third survey of academic libraries in 2013.)

The ebook survey was developed by *Library Journal* and *School Library Journal* to measure current and projected ebook availability in libraries, user preferences in terms of access and subjects, and library purchasing terms and influences.

LJ's public library ebook survey was fielded from April 5, 2013 to June 30, 2013. A survey invite was sent directly to all *Library Journal* and *School Library Journal* newsletter subscribers and the survey link was advertised in *Library Journal* newsletters. A drawing for an Apple iPad mini was offered as incentive to reply.

The survey closed with 553 public libraries from across the United States responding. The survey was developed, programmed, hosted and tabulated in-house. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. public libraries only. Numbers shown in total were weighted on population served to better represent the PLDS distribution of libraries nationwide.

Previous data used for comparison is based on 820 U.S. public libraries in 2012, 1,053 U.S. public libraries in 2011, and 781 U.S. public libraries in 2010.

Public Library Ebook Questionnaire

1. How long has your library offered access to ebooks?
☐ We do not offer ebooks [if no ebooks, skip to Q38]
☐ Less than 1 year
☐ 1 to 2 years
☐ 3 to 4 years
☐ Over 4 years

2. How many ebooks do you have available for users in total, including ebooks with shared access through the state or a regional consortium?
☐ Under 500, specify #_____
☐ 500 to 999
☐ 1,000 to 4,999
☐ 5,000 to 9,999
☐ 10,000 to 19,999
☐ 20,000 to 29,999
☐ 30,000 or more, specify # _____

3. Is your library a member of a consortium license program for its ebook collection?
☐ Yes
☐ No, but planning to join one
☐ No
☐ Don't know

4. Does your library buy ebooks independently?
☐ Yes
☐ No

5. If yes, approximately how many ebooks has your library bought or licensed independently?

☐ Under 100, specify #_____
☐ 100 to 249
☐ 250 to 499
☐ 500 to 999
☐ 1,000 to 2,499
☐ 2,500 to 4,999
☐ 5,000 or more, specify # _____

6. Have you experienced a change in demand for ebooks since this time last year?
☐ Dramatic increase in demand
☐ Slight increase in demand
☐ Demand is unchanged
☐ Decreased demand
☐ We receive no requests for ebooks

7. What percent of your library's ebooks are accessed using each of the following methods?

Downloaded, one user at a time   _____%
Web-based access, one user at a time   _____%
Unlimited, simultaneous access   _____%

8. Are ebooks discoverable through your library's general OPAC?
☐ Yes
☐ No

9. How easily can you track usage statistics for ebooks?
☐ Easily
☐ Not easily
☐ Not at all

10. Approximately, what was your total ebook circulation/usage in 2012?
2012 circulation/usage _____

11. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
☐ Increase, by what percentage? _____%
☐ Stay the same
☐ Decrease, by what percentage? _____%

12. Which categories of ebooks does your library currently offer users? Check all that apply.
☐ General adult fiction (including backlist)
☐ General adult nonfiction (including backlist)
☐ Young adult fiction
☐ Young adult nonfiction
☐ Children's fiction
☐ Children's nonfiction
☐ Children's picture books
☐ Reference
☐ Foreign language
☐ Other (specify)_____

13. What are your top three circulating or most requested <u>fiction</u> ebook categories? (Please select up to three)

☐ Bestsellers   ☐ Mystery/Suspense
☐ Children's   ☐ Romance
☐ Christian fiction   ☐ Science Fiction
☐ Classics   ☐ Street Lit
☐ Fantasy   ☐ Thriller
☐ General adult fiction   ☐ Women's fiction
☐ Historical fiction   ☐ Young adult
☐ Horror   ☐ Other (Specify)_____
☐ Literary fiction   ☐ No fiction ebooks

14. What are your top three circulating or most requested <u>nonfiction</u> ebook categories? (Please select up to three.)

☐ General reference
☐ Bestsellers
☐ Biography/Memoirs
☐ Business/Careers
☐ Computers/Technology
☐ Cooking
☐ Crafts/Hobbies
☐ Health/Fitness/Weight loss
☐ History
☐ Home decorating & Gardening
☐ How-to

☐ Humor
☐ Language learning
☐ Medicine
☐ Political/Current events
☐ Religion/Spirituality/Philosophy
☐ Self-help/Psychology
☐ Sports/Recreation
☐ Test prep
☐ Travel
☐ Other (Specify)_____
☐ No nonfiction ebooks

15. Approximately what percent of the ebooks you have available are fiction titles versus nonfiction titles?

_____% fiction
_____% nonfiction

16. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library:

Adult ebooks _____%
Children's ebooks _____%
YA ebooks _____%

17. Do you have a set holds-to-copy ratio for ebooks?
☐ Yes, please specify your holds-to-copy ratio: _____
☐ No, not for ebooks

18. What device(s) do your library users most often use to read ebooks? Check all that apply.
☐ Library computer
☐ Personal computer or laptop
☐ Dedicated ebook reader (e.g., Nook, Kindle, Sony Reader)
☐ Tablet (e.g., iPad, Kindle Fire)
☐ Smartphone or other mobile device
☐ Other (specify)_____
☐ Don't know

19. Does your library have ereading devices available for patrons to borrow?
☐ Yes, for in-library use/demonstration
☐ Yes, for take home use
☐ Not currently, but considering
☐ No and no plans to acquire

20. If "Yes," who are the intended users? Check all that apply.
☐ Adult patrons
☐ Teen/young adult patrons
☐ Children

Optional Comments:_____

21. If yes, which ereading device(s) does your library currently have available? Check all that apply.

☐ Kindle   ☐ NOOK Tablet
☐ Kindle Fire Tablet   ☐ iPad or iPad mini
☐ Kobo Reader   ☐ Other Tablet
☐ Sony Reader   ☐ iPod Touch or similar
☐ NOOK   ☐ Other (specify) _____
☐ NOOK Color

22. [If Tablet] Do you load educational apps or enhanced ebooks on your library's tablets?
☐ Yes
☐ Not yet, but we are considering
☐ No, we do not load devices with apps

23. [If Yes] How many ereading devices does your library have available for borrow? _____

24. [If Yes] Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
☐ Devices are preloaded with ebooks
☐ Borrowers download ebooks themselves
☐ Mixture of both

25. [If Yes] Does your OPAC include ereading devices in search results?
☐ Yes
☐ Not yet, but planning to include this
☐ No, and no plans

26. [If yes] What are your plans for library-owned ereading devices in the next year? Check all that apply.
☐ Acquire more dedicated ereaders
☐ Acquire more tablets
☐ Replace broken devices
☐ No plans to add more devices

27. How do you promote your ebook collection? Check all that apply.

☐ Signage in the library   ☐ Newsletters
☐ Library website   ☐ E-newsletters
☐ Sign outside library   ☐ Monitor in library
☐ Local newspaper   ☐ Library display
☐ Flyers/Bookmarks   ☐ Blogs
☐ Social media   ☐ Other (specify)_____
☐ Word of mouth   ☐ Do not promote ebook collection

28. What hinders the public from reading your library's ebook content? Check all that apply.

☐ Limited titles available
☐ Difficult to find/discover
☐ Long wait times for ebooks
☐ Digital rights management issues
☐ Limited access to e-reading devices print release
☐ Users prefer print (specify)_____

☐ Not listed in standard library OPAC
☐ In demand titles not available for libraries
☐ Complex downloading process
☐ Unaware of ebook availability
☐ Ebook titles not available concurrent with

☐ Other

29. How often do patrons vocalize the following concerns about ebooks in your library?

	Daily	Weekly	Monthly	Rarely	Never
"The library does not offer a digital copy of the title I want to borrow"					
"The wait time to borrow ebooks is too long"					
"I need help downloading ebooks to my device"					

30. Are you involved in the recommendation/purchasing process of ebooks for your library?
☐ Yes
☐ No (If No, skip to Q37)

31. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks? Check all that apply.

☐ Purchase with perpetual access
☐ Purchase with perpetual access through self-hosting (local ownership)
☐ Subscription
☐ Pay-per-use
☐ License with set # of circs model (specify)_____

☐ Concurrent use/access
☐ Bundled with other content
☐ Patron-driven acquisition
☐ Upfront purchase with maintenance fee
☐ Upfront purchase with update fee
☐ Other

32. Do you supplement your main publisher ebook selections by offering any of the following?

	No	No, but considering	Yes	Yes, and we want to do more
Ebooks from small or independent presses				
E-originals or self-published ebooks through a vendor				
E-originals or self-published ebooks by local authors or on local subjects				
Backlist ebooks				
Project Gutenberg				

Optional Comment:
_____

33. Does your library use patron-driven acquisition for ebooks?
☐ Yes
☐ No, but considering
☐ No, and no plans

34. Please estimate the percentage of your library's materials budget ebooks represented last year, currently represent and the percentage you predict ebooks will represent in 5 years:

	0%	1% - 2%	3% - 5%	6% - 10%	11% - 15%	More than 15%
Last year	☐	☐	☐	☐	☐	☐
Currently	☐	☐	☐	☐	☐	☐
In 5 years	☐	☐	☐	☐	☐	☐

35. Approximately how much does your library expect to spend on ebook titles this fiscal year?
☐ $0 – all ebooks provided by state/district/consortium
☐ Less than $1,000
☐ $1,000 - $4,999
☐ $5,000 - $9,999
☐ $10,000 - $14,999
☐ $15,000 - $19,999
☐ $20,000 - $29,999
☐ $30,000 or more (specify) $_____
☐ Don't know

36. Have you reallocated other areas of your materials budget to pay for ebooks?
☐ Yes, from what areas or formats? Please specify:_____
☐ No

37. If you have any comments about ebooks in your library, please write them below. (After answering, skip to incentive Question 40.)

THE 2 NEXT QUESTIONS ARE FOR THOSE WHO DO NOT CURRENTLY OFFER EBOOKS.

38. Why doesn't your library offer ebooks?
☐ No money for ebooks
☐ Users do not have ereading devices
☐ Lack of technical support
☐ Don't understand logistics of ebooks
☐ No demand for them from users
☐ Waiting to see what the best platform will be
☐ Staff or library board resistance
☐ We are in the process of adding ebooks
☐ Other (specify)_____
39. What are your library's plans for ebook purchases in the next two years?
☐ We will definitely purchase ebooks to add to our collection

☐ We may purchase ebooks but it is not a priority
☐ We will definitely NOT purchase ebooks to add to our collection
☐ Other (specify)_____

DEMOGRAPHICS

40. What is the zip code at your library's location? _____ (U.S. only)

41. How would you describe your library's location?
☐ Urban
☐ Suburban
☐ Rural

42. Which of the following comes closest to your job title?
☐ Library director/Ass't library director librarian
☐ Branch manager/Library manager
☐ Head librarian/Department head
☐ Reference/Information Services librarian
☐ Adult/Public services librarian
☐ Children's/Children's services librarian
☐ Young Adult librarian/Youth services librarian
☐ Electronic resources librarian
☐ Technical Services librarian specify)_____

☐ Collection devel./Materials selection
☐ Acquisitions librarian
☐ Systems librarian
☐ Circulation librarian
☐ Cataloging librarian
☐ Library administrator
☐ Technology coordinator
☐ Library aide
☐ Other (please

43. How would you best describe your library?
☐ Stand-alone, single-branch library
☐ Central branch of a multi-branch system/district
☐ Branch in a multi-branch system/district
☐ Library system or district administrative offices
☐ Other (Specify)_____

44. What size is the population served by your library?
☐ Less than 10,000
☐ 10,000 – 24,999
☐ 25,000 – 49,999
☐ 50,000 – 99,999
☐ 100,000 – 249,999
☐ 250,000 - 499,999
☐ 500,000 – 999,999
☐ 1 million or more

45. Are you interested in receiving a report of the findings from this survey?
☐ Yes
☐ No

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