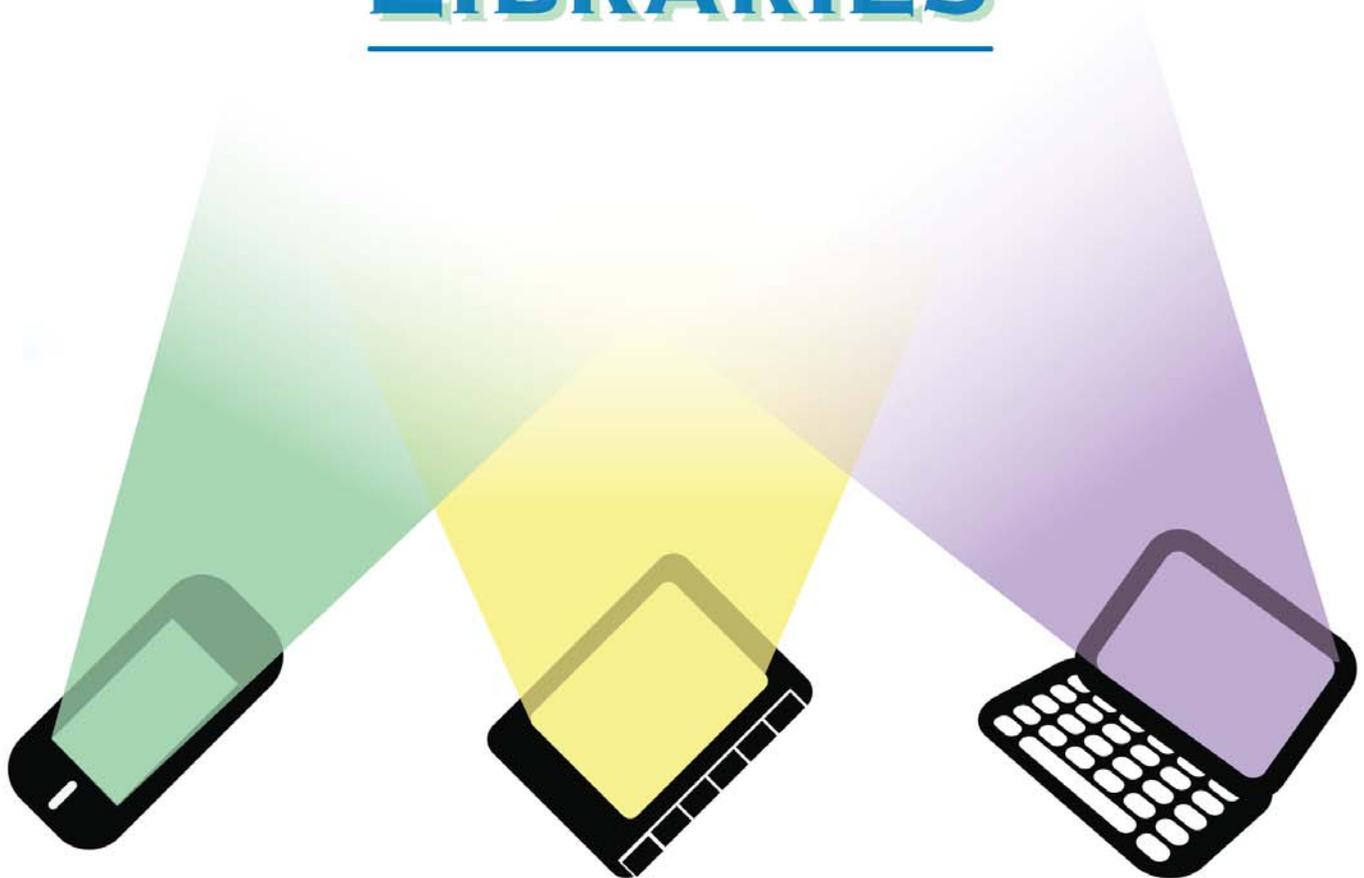


2012

EBOOK USAGE
IN U.S. PUBLIC
LIBRARIES



THIRD ANNUAL SURVEY

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LIBRARY JOURNAL / School Library Journal

Survey of Ebook Usage in U.S. Public Libraries

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EXECUTIVE SUMMARY

Public libraries, more than any of the other type of libraries we have surveyed, are on the front lines of the unresolved tug of war between book publishers, ebook vendors, and libraries. Draconian pricing, restrictions on access, crippling DRM, and a morass of formats and devices present very real challenges to public libraries. At the same time, demand for ebooks is surging, and libraries—never the most lavishly funded institutions even in the best of economic times—are rising to meet these challenges with aplomb.

Our survey this year found increased frustration from libraries that are trying to provide econtent. The relationship between book publishers and libraries has scarcely been more contentious than when it comes to ebooks; piracy paranoia and instability in a long stable business model has endangered the generally amicable relationship book publishers have had with libraries—and in many cases the resulting policies (unfounded as ebook piracy has yet to become a problem) are interfering with libraries' ability to serve their users. For publishers, these policies are also likely resulting in missed opportunity for discovery of those books not available, as *LJ's* Patron Profiles research indicates.

Ebooks have seen a dramatic uptake in public libraries over the past several years, and this year's survey reports a continuation of some of the trends we have been seeing over the past two surveys. As noted last year, ebooks in libraries have become "the new normal." But looking carefully at the survey data, it seems that can be a very fragile normal. The history of technology is littered with the carcasses of previous "new normals."

Vast Majority Offer Ebooks

Almost nine in ten public libraries currently offer ebooks to their users, and 35% of those that don't are in the process of adding them. The top reason for not offering ebooks is not a surprise: "no money for ebooks."

Two-thirds of libraries are members of a consortium license program for their ebook collections. The average library today has 10,000 ebooks available for users, either obtained independently or made available through a consortium.

<i>Ebooks offered</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>
Mean # ebooks offered currently	1,500	4,350	10,000

Public libraries have been offering ebooks to their users for, on average, 2.5 years.

Rapid Rise in Ebook Circulation

Ebook circulation in public libraries doubled from 2009 to 2010 and quadrupled from 2010 to 2011. Three-quarters of respondents remarked that they have seen “dramatic increases” in demand over the last year, the result of more patrons acquiring ereading devices and libraries acquiring and marketing their ebook collections. Their expectation is that circulation will increase another 67% this year.

“Circulation of ‘traditional’ materials at public libraries is dropping while the demand for downloadable electronic materials is rising rapidly.”

Ebook circulation	2009	2010	2011
Ebook circulation/usage	5,000	11,000	44,000

Ebook Categories

2012 saw increases in all categories of ebooks carried, but children’s and young adult ebooks stood out in particular, and libraries reported that these demographics began accessing ebooks with greater frequency than other groups.

Percent offering...	2010	2011	2012
Children’s ebooks	57%	76%	87%
Young adult ebooks	69%	80%	91%

Even so, about three-quarters of public libraries’ ebook collections are comprised of adult titles (74%) compared to children’s/YA titles (26%).

A few libraries (4%) are offering self-published ebooks to fill in gaps in their collections, and another 27% are considering that option.

“Demand has escalated dramatically; [we’re] having to buy works by unknown authors or only backlist titles.”

Ebook Usage Demographics

The most active age group accessing library econtent is the 35 to 44 range, followed closely by 45 to 54. The age range that saw the largest increase in usage over the last year, however, was young adults/teens. Whether this is a result of increased availability of age-appropriate ebooks or because of libraries licensing more content is not apparent. It could also be that this is the prime “gadget” generation. It could also be the vampires...

“Ebooks have drawn a new population of readers into the library. This technology opened an avenue to a greater exploration of knowledge and inspiration.”

Ebook Formats and Devices

Each survey has noted the swirl of competing formats and devices and how they are hampering further demand and ebook acquisition. Has there been any stability achieved yet?

In public libraries, the ePub format remains the preferred ebook format, although it's slipped slightly from last year. What have grown by leaps and bounds are formats "optimized for dedicated ebook devices." Each Christmas (or birthday), more people get Kindles and Nooks, and look for compatible content. Twelve percent of respondents in 2012 specifically wrote in "Kindle format." Also up was "optimized for other mobile device," which includes tablets like the iPad. The iPad blurs some of these categories; ePub is the default format for Apple's iBooks, but both Barnes & Noble and Amazon have apps that let users read Nook and Kindle ebooks, respectively, on iPads.

Preferred ebook formats...	2010	2011	2012
ePub	44%	63%	61%
Optimized for dedicated ebook device (e.g., Nook, Sony Reader)	35%	40%	59%
Optimized for other mobile device (e.g., Smartphone, iPod Touch)	24%	23%	26%
PDF	42%	23%	18%
Kindle (AZW)(write-in answer)	n/a	1%	12%
Full text HTML	20%	6%	7%
Other	8%	1%	2%
Don't know yet, ebooks haven't caught on in my community	23%	2%	1%
Don't know	n/a	15%	11%

Dedicated ereaders and tablets are becoming far and away the most popular devices used to read public library ebooks. The vast majority of ebook content in public libraries is downloaded (89%) rather than read online, the opposite of what we found in academic and school libraries.

Preferred ereading devices...	2010	2011	2012
Dedicated ebook reader (e.g., Nook, Kindle, Sony Reader)	52%	85%	90%
Tablet (e.g., iPad)	n/a	n/a	66%
Smartphone or other mobile device	n/a	61%	41%
Personal laptop/ Computer/ Netbook	61%	53%	33%
Library computer	16%	4%	2%
Other portable device (e.g., iPad, Smartphone, etc.)	36%	n/a	n/a
Other	2%	1%	0%
Don't know	25%	11%	9%

About 24% of public libraries circulate ereading hardware for take-home use, while 4% circulate ereaders for in-library use. More than one-third of libraries are considering circulating ereaders. Most of the libraries that circulate ereaders circulate the Amazon Kindle. Last year, the original Nook was the top circulating

ereader, but has lost ground to the Kindle. Two-thirds of the libraries that circulate ereaders preload the ebooks on them.

“Our devices are used mostly to help people learn how to use them.”

“Patron damage to other electronic devices borrowed is causing us to rethink this idea.”

Expect More Spending on Ebooks

The amount of money libraries plan to spend on ebooks this fiscal year is 9% higher than in 2011 (\$9,500 in 2011 vs. \$10,400 in 2012). These are medians, because a large differential appears between means and medians for this question. We project total spending on ebooks by U.S. public libraries to be \$79 million in the current fiscal year.

Spending as a percentage of libraries’ total materials budget is expected to double in five year’s time.

Population Served	Ebook spending as a percentage of total materials budget		
	2011	2012	In 5 years
<25,000	2.5%	5.2%	10.6%
25,000–99,999	2.9%	5.8%	12.7%
100,000–499,999	4.6%	7.5%	14.1%
500,000+	4.0%	7.5%	14.5%

A challenge for libraries lies in expanding ebook collections while maintaining robust print and other services. An ever-increasing number of libraries are reallocating funding from print titles (and elsewhere in their materials budgets) to pay for ebooks.

Reallocate funds from physical materials to pay for ebooks...	2010	2011	2012
Yes	38%	54%	68%
No	62%	46%	32%

Purchasing Terms

For most public libraries, “purchase with perpetual access” remains the top purchasing model, although “subscription” is increasing in prevalence (not that librarians are especially happy with this option). “License with a set number of circs” is also on the rise. “Patron-driven acquisition” has doubled to one-fifth of public libraries, and is becoming a favored purchasing model as it allows libraries to only pay for titles when users actually check them out. Academic libraries in particular have found this to be a highly cost-effective option.

Barriers to Ebook Use

If there is one thing that librarians say is deterring library users from checking out ebooks, it is the paucity of titles available. In this survey, for the first time, issues related to limited selection and long wait times for desired titles trumped every other barrier to ebook access, even technical problems. This is greatly impacted by the reality that some major publishers either deliberately refuse to license ebooks to libraries or make them cost prohibitive.

<i>What hinders the public from accessing your ebook collection...</i>	2010	2011	2012
Long wait times for ebooks	n/a	52%	72%
Limited titles available	n/a	n/a	71%
In demand titles not available for libraries	n/a	41%	60%
Complex downloading process	45%	60%	55%
Digital rights management issues	37%	46%	49%
Unaware of ebook availability	59%	49%	35%
Limited access to e-reading devices	44%	38%	31%
Ebook titles not available concurrent with print release	n/a	24%	27%
Lack of training	48%	37%	26%
Difficult to find/discover	37%	29%	22%
Users prefer print	34%	28%	22%
Difficult to read onscreen/online	21%	10%	5%
Incompatibility with preferred reading devices	50%	80%	n/a
Other	8%	4%	4%

“Ereaders have become so affordable for the public and they are willing to buy a couple of books. After those initial purchases, they come to the library looking for the content. It has been very difficult to help the public understand why there is not enough content available through the library. When staff tries to explain the costs and that only two of the big six are working with libraries, some are stunned and others walk away shaking their heads. Publishers have got to get on board and work with us, not against us.”

Libraries and Their Vendors

OverDrive, Gale Virtual Reference Library, and Project Gutenberg¹ were the top three ebook vendors used by public libraries, with OverDrive used by 92%.

<i>Top 5 book vendors patronized... (multiple responses permitted)</i>	
OverDrive	92%
Gale Virtual Reference Library	35%
Project Gutenberg	22%
EBSCOhost (formerly NetLibrary)	20%
Learning Express	17%

OverDrive is the most preferred ebook vendor, according to 58% of public libraries, although 32% expressed “no preference.” Indeed, as the written

¹ Project Gutenberg (<http://www.gutenberg.org/>) isn't a vendor per se, but is an online database of free ebooks—typically public domain titles—offered in a variety of formats.

comments from survey respondents indicate, librarians are generally less than thrilled with any ebook vendor, although that animosity stems from their feelings toward the publishers themselves.

“I think the HarperCollins’ limited circs model, or the Freading cost/download model are probably the most ‘fair.’ Hopefully, they will spread and standardize. I do not like the Random House x3 pricing—that’s simply absurd.”

“The loss of access to most publishers’ titles as well as the skyrocketing cost of those that are available is severely impacting our ability to provide resources to patrons.”

Discounts?

Are public librarians satisfied with the discounts they get from ebook vendors? Not at all: a full 47% are “dissatisfied” and a further 33% are “very dissatisfied.” Only 20% are at all satisfied, and only a scant 1% is “very satisfied.”

“What discounts? The prices we pay are higher than consumers and much higher than we pay for physical copies.”

Important Vendor Attributes

The most vitally important attributes for public libraries are a mixture of pricing, selection, and device support. The top item—selected by all respondents—was “fair price.” A close second, selected by 99%, was “wide selection of titles and formats,” followed by “multiple device options offered” and “user-friendly interface.” A new attribute added to the 2012 survey, “cloud-based access model,” was selected by 51% of respondents.

Top attributes of ebook vendors...	2010	2011	2012
Fair price	98%	99%	100%
Wide selection of titles & formats	100%	99%	99%
Multiple device options offered	98%	100%	98%
User friendly interface/Ease of use for library users	98%	99%	98%
Customer service	94%	96%	94%
Timely turnaround time from order to delivery	85%	90%	91%
Easy to use administrative portal	82%	89%	89%
Release date concurrent with print release	n/a	75%	79%
Vendor maintains a portal for our library with our own library branding	76%	79%	79%
Customized searching parameters	49%	67%	77%
Staff training available	76%	80%	76%
Consortial licensing	56%	69%	72%
Free/timely receipt of MARC records for the library OPAC to support discovery	68%	70%	66%
Cloud-based access model	n/a	n/a	51%
Ebook available from print vendor, facilitating the order process	34%	38%	40%
User sharing (e.g. social bookmarks, comments, voting)	n/a	n/a	23%
Availability of a monthly ebook selection service	40%	43%	n/a
User personalization services	43%	53%	n/a

Conclusions

This year's ebook survey reinforces that "price" and "selection" have become the two biggest issues for public libraries. Awareness and technical issues are being resolved. Library customers increasingly know how to use their ereading devices and get content on them, but publishers and vendors are imposing substantial barriers to customer use. The idea that some titles are not available as ebooks to libraries strikes many, if not most, librarians—and their library users—as patently absurd.

Yes, ebooks are the "new normal" in libraries—but it is a fragile normal. Ebooks are a robust growth area for libraries (and, we dare say, publishers), but anyone taking that growth for granted does so at their peril. Any technology can be abandoned, as the examples of 8-track tapes, cassette tapes, floppy disks, VHS tapes, vinyl records, and, very soon, CDs and DVDs all too readily point out. Book-reading itself has long been an easily disrupted pastime, thanks to TV, the Internet, video games and social media. And with the closure of bookstores, there are fewer commercial spaces for readers to discover books and authors, but public libraries remain ubiquitous discovery zones.

There is definitely a growing demand for ebooks in public libraries and libraries are prepared to pay for a user-friendly, library-friendly usage model. But they can only pay so much. Publishers and libraries, and readers, will be much better off as more compromises are reached to ensure ready access at fair prices to the full range of titles.

INTRODUCTION

About the 2012 *Library Journal* Ebook Survey

Welcome to the third annual *Library Journal* survey of electronic book penetration and use among public libraries. Our original 2010 report and the 2011 follow-up contained much eye-opening data on this new technology and how libraries and their users were adapting to and adopting it.

The present report is one of three—the other two concern academic and school libraries—that look at the current state of ebooks and their place in libraries.

Our most recent survey reprises many questions from last year's survey—allowing us to track longterm trends more effectively, as we now have three 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.

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 hardware devices to users and how they maintain those devices. These questions tended to skew toward those who experienced problems or had complaints, but generally reflected a very high comfort level with ebooks, both among library staff and among library patrons. These verbatim responses are a useful lens through which to view the quantitative results of our survey, and provide a useful “fly on the wall” perspective of what the ebook situation is for libraries.

A selection of these responses can be found at the ends of Chapters 2, 3, 4, and 5.

The methodology and questionnaire are included in the Appendix.

Structure of This Report

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.

Many charts include both the 2012 and 2011 responses to questions, for quick comparison. In some cases, we altered the phrasing of the question or changed the response selection, so direct comparison is not entirely possible. In those cases, we have presented the 2011 data in a separate chart. In some other cases, basic chart legibility precluded inclusion of the 2011 data series. In those cases, we opted to add the 2011 data as a separate chart. Also in the interest of legibility and clarity, we have called out in commentary where the 2010 data demonstrated a clear trend. We have made these decisions on a question-by-question basis.

Each chart is followed by a corresponding table that breaks down the survey responses by population served and size of materials budget. (We also included

both 2012 and 2011 data for those who want to compare the entirety of both datasets.) We segmented the public libraries by population served—or, roughly, “small” (fewer than 25,000 users), “small to mid-size” (25,000–99,000), “mid-size to large” (100,000–499,999), and “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. This is reflected in budget data, to be sure, but also in other areas, such as ebook categories that are in the most demand.

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.

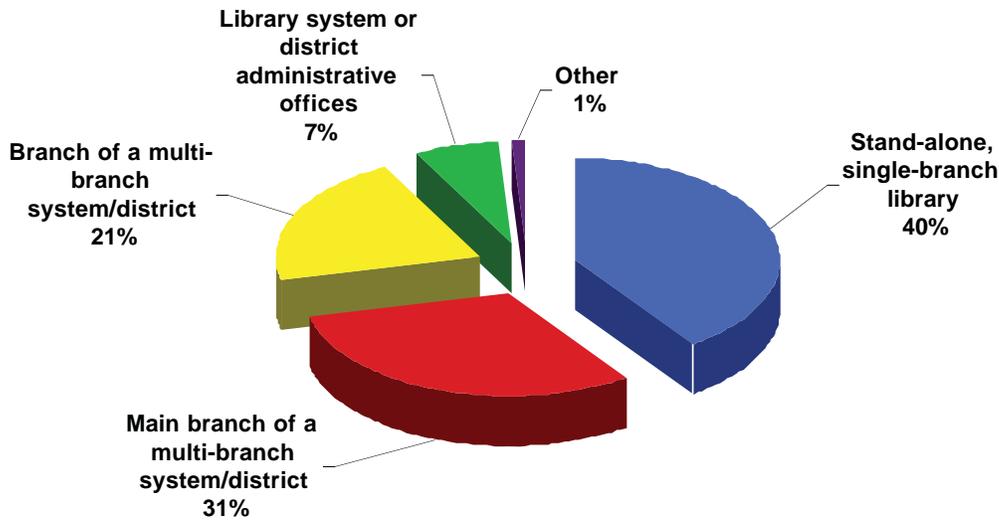
1. PROFILE OF RESPONDENTS

This section provides a basic demographic profile of the 820 libraries that responded to our 2012 survey.

Type of Library

As the chart below shows, 40% of the public libraries responding to this questionnaire described themselves as a “stand-alone, single-branch library,” 31% described themselves as the “main branch of a multi-branch system or district,” and 21% were smaller branches of a multi-branch system or district.

Figure 1. How would you describe your library?
% of public libraries



The table below breaks these data down by population served and materials budget. In small populations, the majority (75%) of respondents are stand-alone libraries, while in larger populations respondents tended to be a branch (if not the main branch) of a larger system.

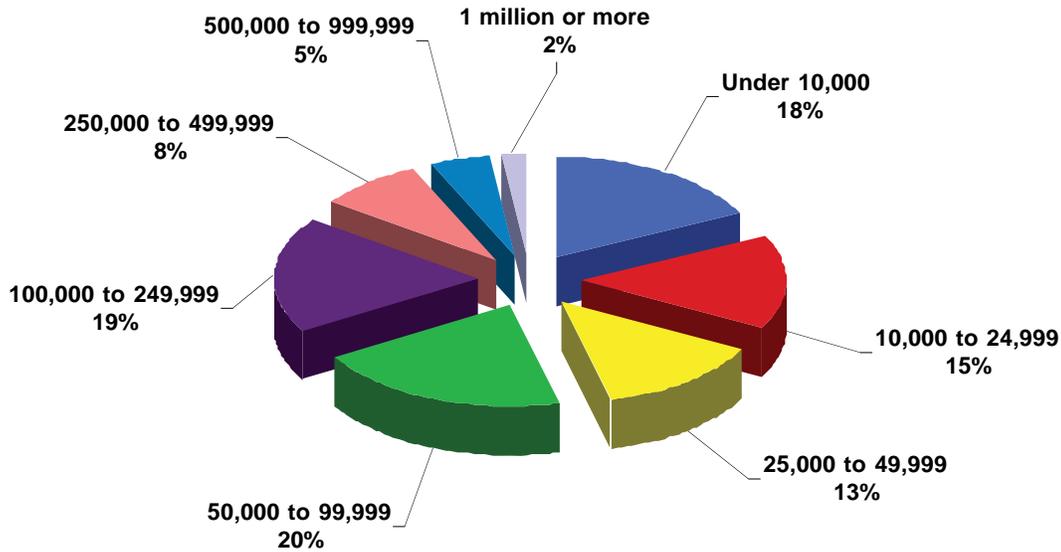
Table 1. How would you describe your library?
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Stand-alone, single-branch library	75%	44%	7%	0%	70%	63%	24%	12%
Main branch of a multi-branch system/district	8%	32%	52%	34%	9%	21%	45%	41%
Branch of a multi-branch system/district	14%	19%	26%	38%	17%	13%	24%	26%
Library system or district administrative offices	1%	3%	14%	28%	2%	2%	7%	22%
Other	2%	1%	1%	0%	3%	1%	0%	0%

Population Served

For libraries serving populations of less than 250,000, our sample is fairly evenly divided among the population breakdowns; 13% serve a population of 25,000–49,999, 15% serve a population of 10,000–24,999, and 18% serve a population of less than 10,000. At the larger end of the population served range, 20% of our sample serves a population of 50,000–99,999, and 19% serves a population of 100,000–249,999. Fifteen percent serve a population of more than 250,000.²

**Figure 2. What size is the population served by your library?
% of public libraries**



**Table 2: What size is the population served by your library?
% of public libraries by materials budget**

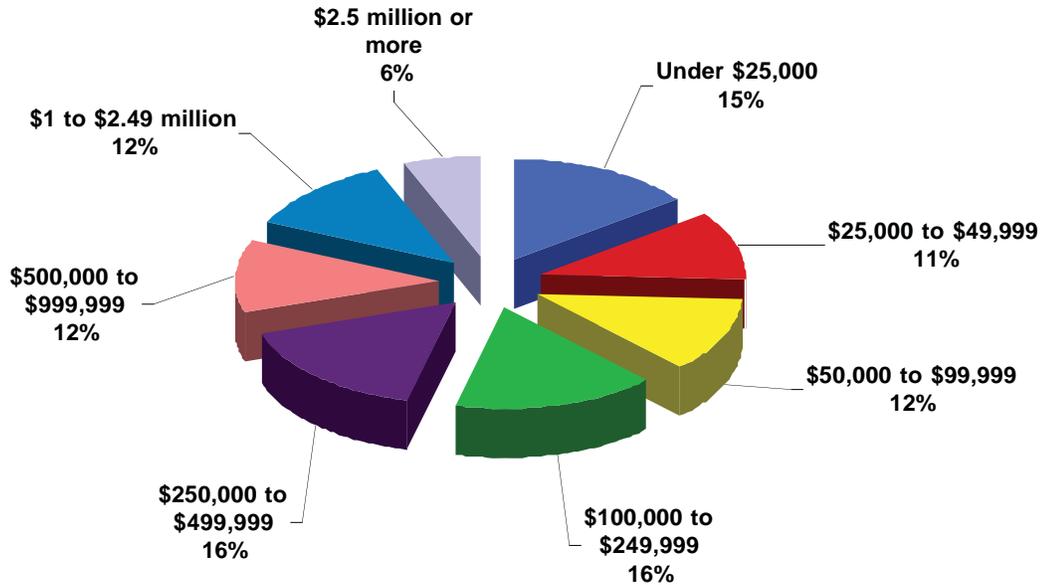
	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Under 10,000	60%	14%	3%	0%
10,000 to 24,999	24%	31%	9%	4%
25,000 to 49,999	11%	28%	13%	8%
50,000 to 99,999	3%	18%	23%	14%
100,000 to 249,999	2%	8%	31%	15%
250,000 to 499,999	0%	1%	16%	24%
500,000 to 999,999	0%	0%	3%	18%
1 million or more	0%	0%	2%	18%
Mean	18,700	50,000	179,200	490,000
Median	8,500	29,500	106,700	350,800

² Mean population served: 147,200. Median population served: 59,600

Materials Budget

The mean materials budget this year (that is, the current fiscal year) for public libraries responding to our survey is \$679,300.³ One out of three respondents (30%) reported that their total materials budget for the current year was \$500,000 or greater.

**Figure 3. What is your library's total materials budget for the current fiscal year?
% of public libraries**



**Table 3. What is your library's total materials budget for the current fiscal year?
% of public libraries by population served**

	< 25,000	25K-99K	100K-499K	500K+
Under \$25,000	39%	5%	1%	0%
\$25,000 to \$49,999	23%	10%	3%	0%
\$50,000 to \$99,999	20%	17%	1%	2%
\$100,000 to \$249,999	10%	28%	11%	0%
\$250,000 to \$499,999	4%	19%	26%	5%
\$500,000 to \$999,999	2%	9%	26%	9%
\$1 to \$2.49 million	1%	9%	26%	32%
\$2.5 million or more	0%	3%	6%	52%
Mean \$	109,700	511,800	1,057,800	3,227,300
Median \$	37,300	196,900	654,700	2,543,100

³ Mean materials budget: \$679,300. Median materials budget: \$212,900.

Library Location

Nearly half (46%) of public libraries responding to our survey are located in a suburban area, while 26% are in an urban area, and 28% are in a rural location.

Figure 4. How would you describe your library's location?
% of public libraries

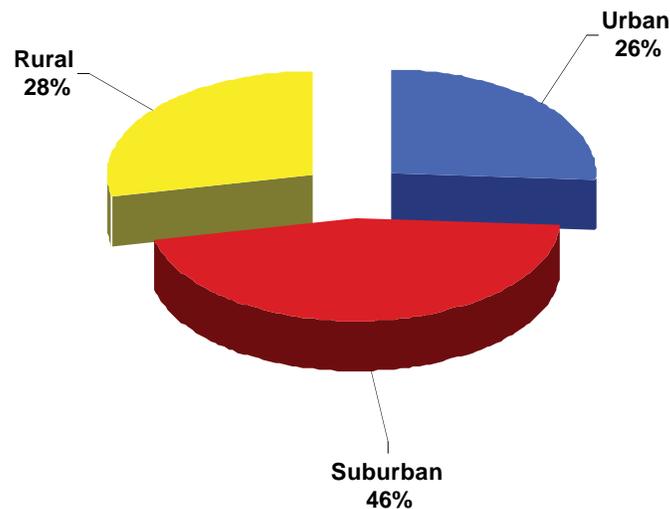


Table 4. How would you describe your library's location?
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Urban	6%	22%	47%	76%	7%	15%	38%	53%
Suburban	31%	64%	49%	32%	26%	53%	54%	50%
Rural	65%	18%	10%	7%	70%	33%	15%	8%

In terms of specific geographical location, we had a fairly even distribution of public libraries in the four general regions—Midwest, Northeast, West, and South—with a modest skew toward the Midwest (28%).

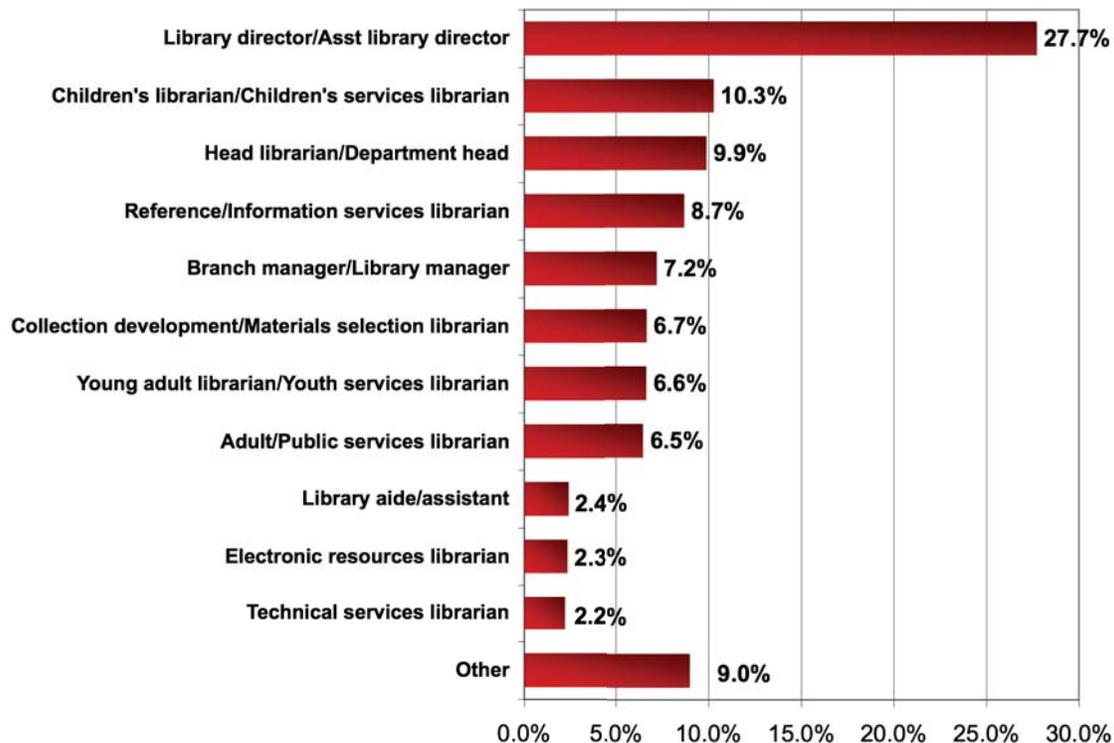
Specific U.S. Geographical Location	% of total	U.S. Geographical Region	% of total
East No. Central	22%	MIDWEST	28%
South Atlantic	14%	SOUTH	26%
Pacific	14%	WEST	24%
Mid Atlantic	13%	NORTHEAST	21%
Mountain	11%		
New England	9%		
West So. Central	8%		
West No. Central	6%		
East So. Central	4%		

Specific Respondent Title/Purchase Authority

Who in the library specifically answered our survey, and what authority do they have in buying/recommending ebook acquisitions?

Most respondents (28%) were either the library director or assistant library director, while about 10% identified themselves as either the children's librarian or the head librarian/department head.

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



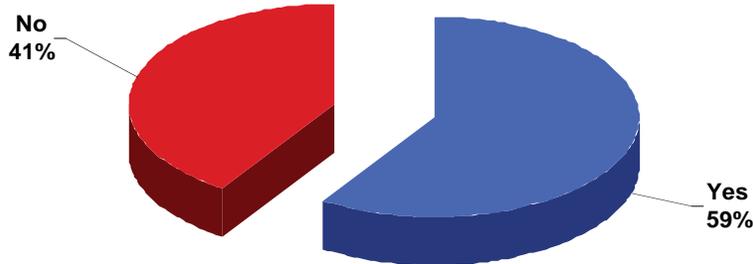
In smaller libraries, our questionnaire was more likely to have been completed by the library director, while in larger libraries it was more likely to have been completed by a collection development or materials selection librarian. (See table below.) In smaller libraries, one individual is likely to fill many or most roles, unlike larger libraries which will have a greater division of labor.

**Table 5. Which of the following comes closest to your job title?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
Library director/Ass't library director	55%	19%	14%	2%	57%	37%	13%	8%
Children's librarian/Children's services librarian	9%	14%	8%	8%	11%	8%	10%	9%
Head librarian/Department head	6%	11%	13%	12%	3%	8%	17%	12%
Reference/Information services librarian	4%	12%	9%	10%	1%	9%	14%	8%
Branch manager/ Library manager	6%	7%	8%	7%	11%	4%	6%	6%
Collection development/ Materials selection librarian	1%	3%	13%	25%	1%	2%	9%	18%
Young adult librarian/ Youth services librarian	6%	7%	6%	10%	5%	10%	6%	7%
Adult/Public services librarian	4%	9%	7%	5%	4%	6%	7%	8%
Library aide/assistant	2%	3%	2%	0%	2%	2%	2%	2%
Electronic resources librarian	1%	2%	3%	12%	0%	2%	2%	7%
Technical services librarian	2%	3%	3%	0%	1%	4%	2%	2%
Circulation librarian	1%	1%	3%	0%	0%	2%	2%	1%
Cataloging librarian	1%	2%	1%	2%	2%	0%	1%	2%
Technology coordinator	0%	2%	1%	2%	0%	1%	1%	2%
Web/Virtual Services Librarian	0%	0%	2%	2%	0%	0%	1%	2%
Acquisitions librarian	0%	2%	1%	2%	0%	1%	1%	1%
Systems librarian	0%	1%	2%	0%	0%	0%	2%	1%
Library administrator	0%	0%	2%	2%	0%	0%	1%	2%
Other	1%	3%	3%	0%	1%	1%	3%	4%

Almost six out of ten respondents (59%) said that they are directly involved in the ebook purchasing or recommendation process.

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



Involvement is greater at larger libraries likely because small libraries depend more on consortia for their ebook collections.

Table 6. Are you involved in the recommendation/purchasing process of ebooks for your library?
% of public libraries by population served and materials budget

	<i>Population Served</i>				<i>Materials Budget</i>			
	<i>< 25,000</i>	<i>25K–99K</i>	<i>100K–499K</i>	<i>500K+</i>	<i><\$50K</i>	<i>\$50–\$249K</i>	<i>\$250–\$999K</i>	<i>\$1 Mil+</i>
Yes	55%	61%	61%	71%	50%	65%	61%	67%
No	45%	39%	39%	29%	50%	35%	39%	33%

Onward

Our sample of public libraries was evenly distributed throughout all geographical areas, population served, and materials budgets, which will give us a good overall picture of the total ebook experience. The respondent profile of the present survey is consistent with that of the 2011 and 2010 surveys, facilitating comparisons and the identification of trends.

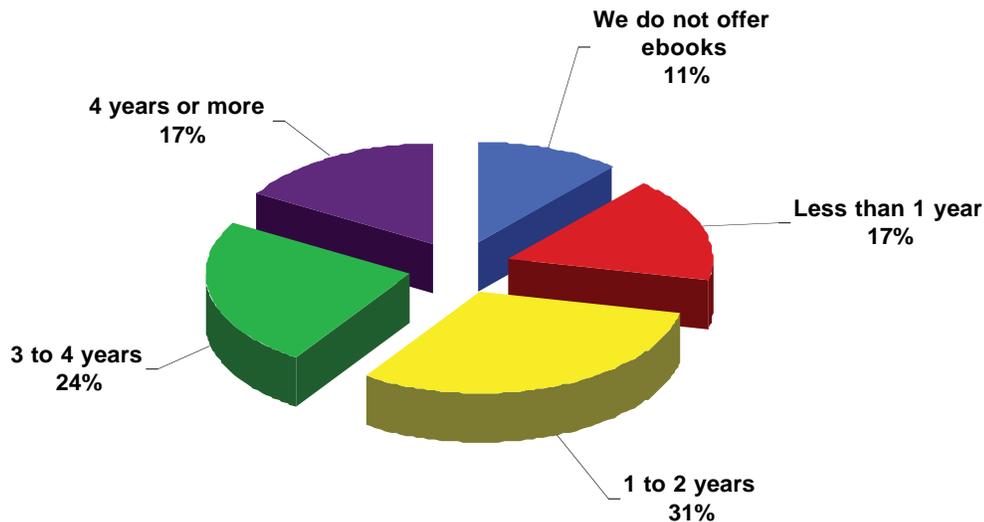
2. EBOOK COLLECTIONS

In this section, we'll take a look at the quantity and composition of public libraries' ebook collections.

Offer Ebooks

We reworded a key question this year to determine not only if libraries were offering ebooks, but for *how long*. The results showed that 89% of public libraries currently carry ebooks (up from 82% last year and 72% in 2010). We found that public libraries have been offering ebooks to their users for, on average, 2.5 years. Some—17%—were on the bleeding edge and have been offering ebooks for four or more years, while another 17% have only offered them for a year or less.

**Figure 7. How long has your library offered access to ebooks?
% of public libraries**



Ebook offerings—and the length of time libraries have been offering ebooks— increase directly as population served increases; 77% of small libraries currently offer ebooks, compared to 93% of mid-sized and 100% of the largest libraries. There is a correlation between ebook offerings, length of time carrying ebooks, and materials budget as well.

**Table 7: How long has your library offered access to ebooks?
% of public libraries by population served and materials budget**

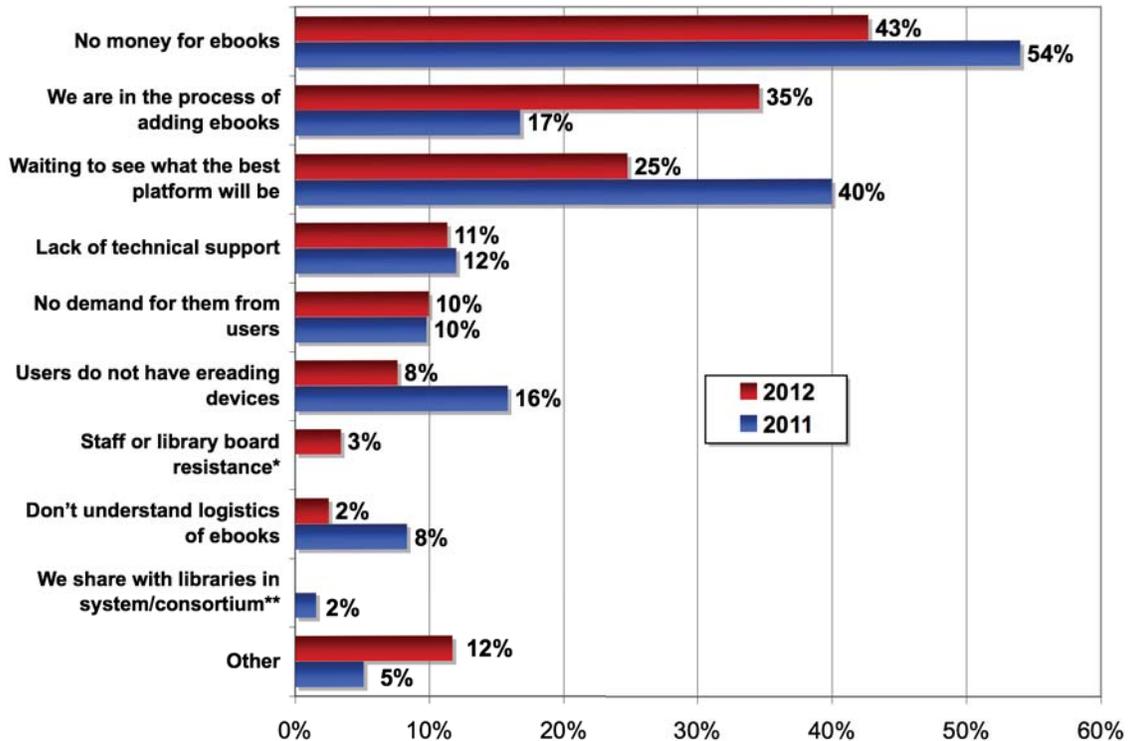
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
We do not offer ebooks	23%	7%	7%	0%	29%	11%	4%	2%
Less than 1 year	21%	18%	14%	3%	25%	17%	14%	11%
1 to 2 years	33%	33%	28%	22%	28%	39%	28%	24%
3 to 4 years	19%	28%	24%	32%	15%	24%	31%	26%
4 years or more	4%	14%	28%	42%	3%	9%	22%	37%
Mean # years	1.9	2.4	2.8	3.5	1.7	2.2	2.8	3.2

Libraries That Do Not Offer Ebooks

What is holding back public libraries from offering ebooks to users? Of the 11% of public libraries that don’t offer ebooks, the primary reason is “no money for ebooks” (selected by 43%, although that has declined from 54% last year).

“Waiting to see what the best platform will be” has declined dramatically (from 40% to 25%), and even “users do not have ereading devices” halved from 16% to 8%. Most importantly, “we are in the process of adding ebooks” doubled from 17% to 35% this year.

**Figure 8. Why doesn’t your library offer ebooks?
% of public libraries that do not offer ebooks to users**

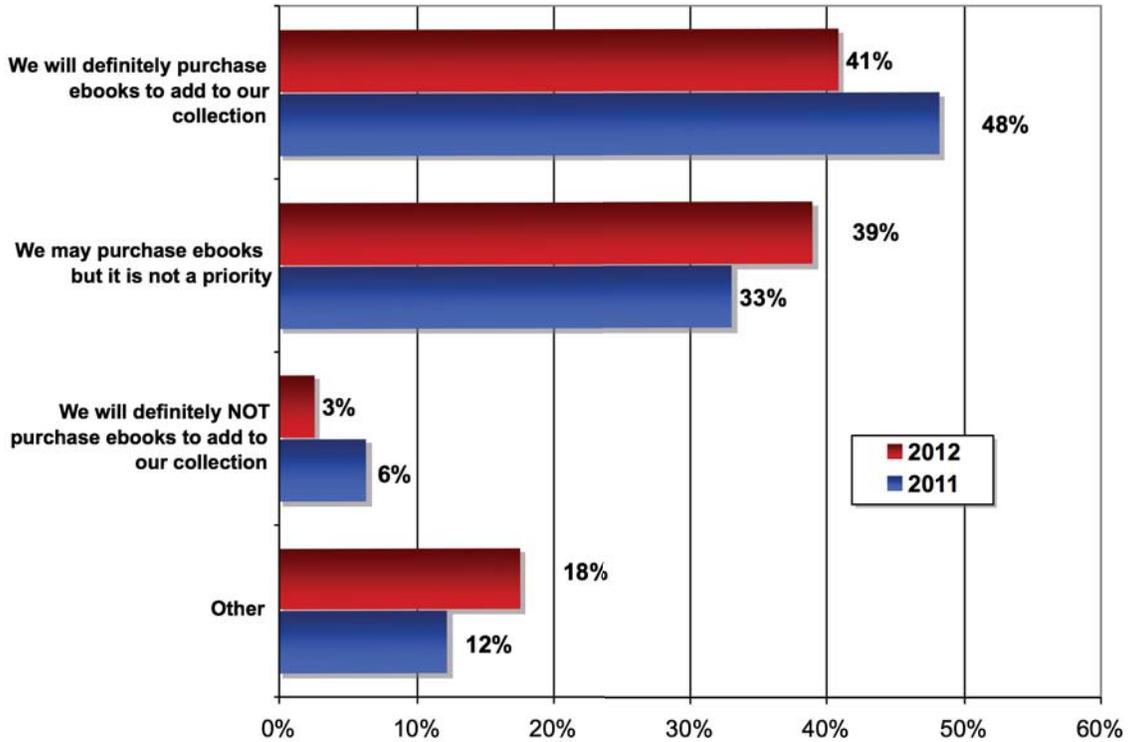


* Added to 2012 survey.

** Included in 2011 survey only.

Additionally, of those libraries that do *not* currently offer ebooks, 41% (down from 49% last year) say they *definitely* plan to offer ebooks in the next 12 months, while 39% (up from 33%) say they *may* add ebooks, but it's not a high priority. Only 3% say they will definitely *not* be adding ebooks to their collections in the next two years.

**Figure 9. What are your library's plans for ebook purchases in the next two years?
% of public libraries that do not offer ebooks to users**



The responses to the two previous questions were based on small numbers of respondents (11% of our total sample), therefore cross-tabulations would be unreliable and are not shown here.

Number of Ebooks Carried

On average, public libraries that carry ebooks own or subscribe to more than 10,000 ebooks.⁴ This is up more than twofold from last year (2011 mean ebooks was 4,350, median 1,750). In our original 2010 survey, mean ebooks carried was 1,529 (median 813). Note, however, that we rephrased the question this year from “How many ebooks do you have available for users?” to “How many ebooks do you have available for users in total, including ebooks with shared access through the state or a regional consortium?” We don’t know if previous respondents included shared-access titles in their overall counts—it’s likely they did—but this year we opted to clarify that issue.

Figure 10. How many ebooks do you have available for users in total, including ebooks with shared access through the state or a regional consortium?
 % of public libraries

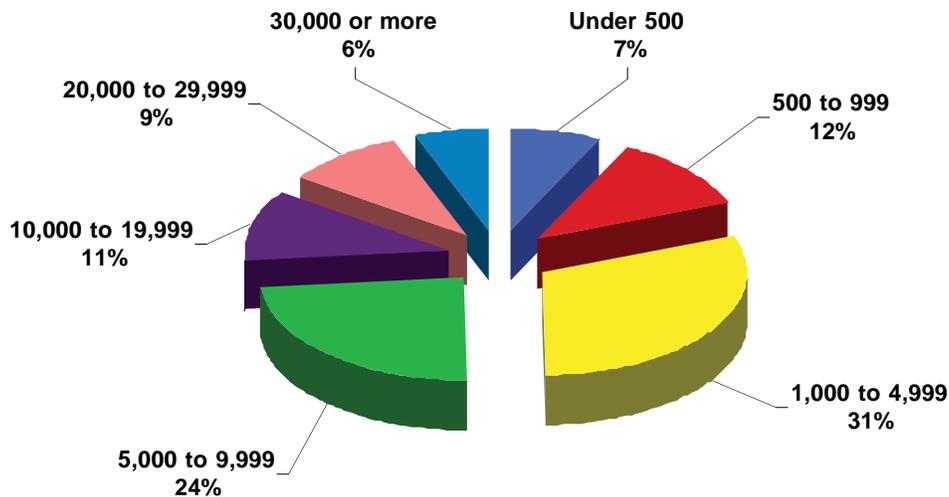
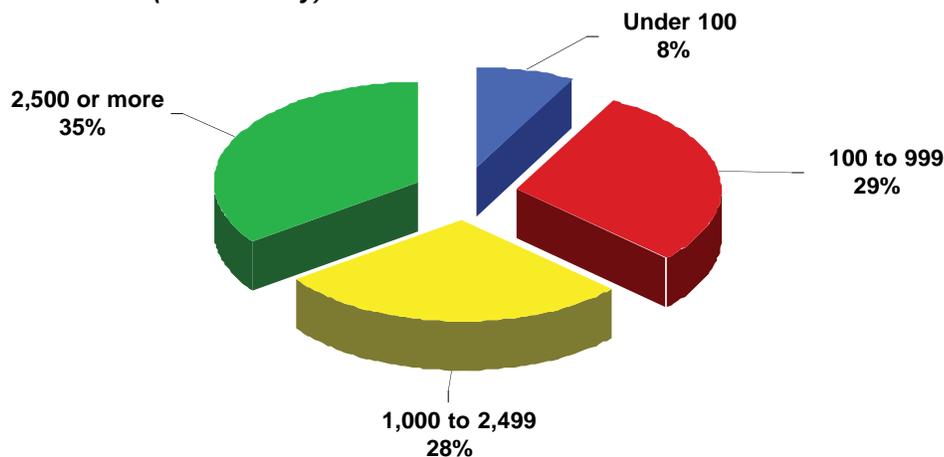


Figure 11. How many ebooks do you have available for user?
 % of public libraries (2011 survey)



⁴ Mean ebooks carried: 10,090. Median ebooks carried: 5,080.

The number of ebooks owned or licensed doubled (sometimes almost tripled) for all size libraries in the last year.

Table 8. How many ebooks do you have available for users in total, including ebooks with shared access through the state or a regional consortium?⁵ —Public libraries by population served and materials budget

	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Under 500	10%	7%	5%	2%	13%	8%	5%	2%
500 to 999	16%	14%	10%	2%	15%	14%	12%	7%
1,000 to 4,999	36%	27%	33%	15%	38%	33%	28%	20%
5,000 to 9,999	18%	29%	24%	23%	13%	28%	25%	27%
10,000 to 19,999	13%	10%	10%	17%	12%	7%	14%	17%
20,000 to 29,999	4%	9%	12%	21%	7%	4%	13%	13%
30,000 or more	4%	4%	7%	19%	2%	6%	4%	15%
Mean	7,621	8,626	12,203	18,076	7,022	8,223	10,787	15,129
Median	3,741	5,375	5,500	14,444	3,290	4,396	6,036	9,090
2011								
Under 100	10%	9%	6%	1%	15%	9%	4%	4%
100 to 999	41%	31%	23%	19%	43%	33%	32%	16%
1,000 to 2,499	27%	30%	30%	20%	27%	30%	31%	23%
2,500 or more	22%	31%	41%	60%	14%	28%	33%	57%
Mean	2,709	3,547	4,586	9,612	1,988	3,614	3,532	7,423
Median	875	1,750	1,750	3,750	875	1,750	1,750	3,504

⁵ Note that 2011 data were in response to the question, “How many ebooks do you have available for users?” while the 2012 data are in response to “How many ebooks do you have available for users in total, including ebooks with shared access through the state or a regional consortium?”

Increased Demand for Ebooks

Demand for ebooks has been increasing, with 79% of public libraries saying that they have seen a “dramatic increase” in demand for ebooks—up from 66% last year, and 18% reported a “slight increase,” down from 28%. Very few, if any, said that the request level was unchanged or that they received no requests at all.

Figure 12. Has your library experienced an increase in requests for ebooks since this time last year?

% of public libraries

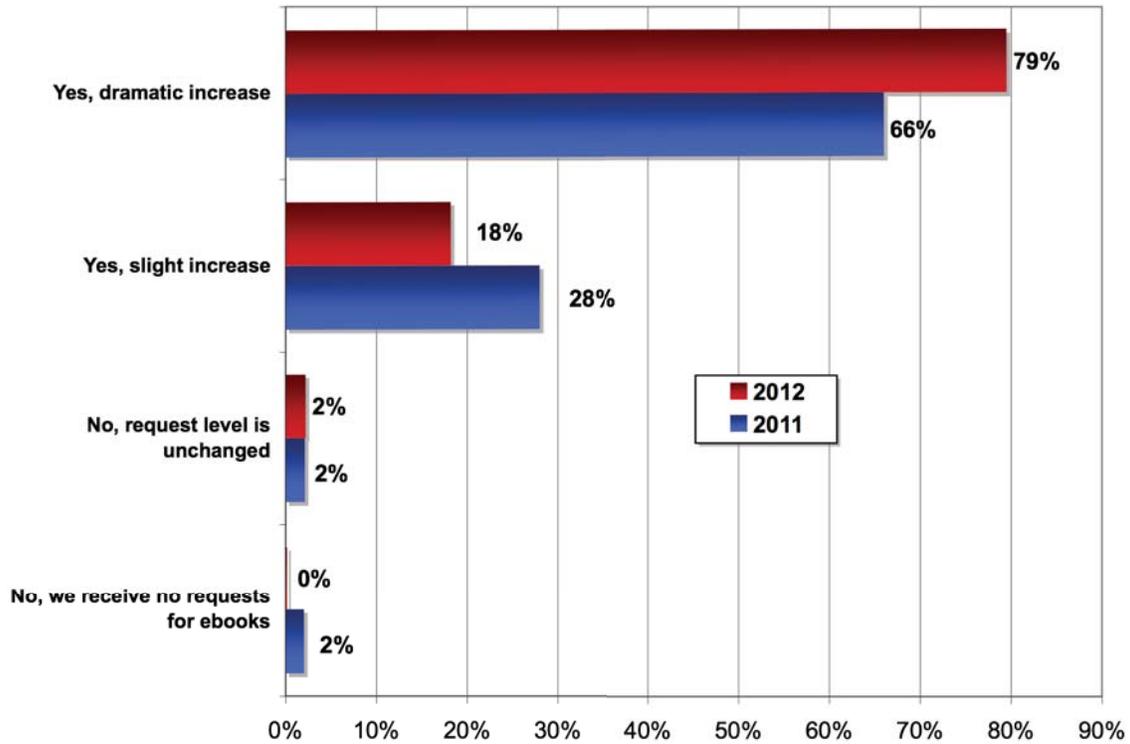


Table 9. Has your library experienced an increase in requests for ebooks since this time last year?

% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Yes, dramatic increase	68%	79%	87%	89%	62%	75%	80%	91%
Yes, slight increase	27%	20%	12%	7%	32%	23%	18%	6%
No, request level is unchanged	4%	1%	1%	4%	5%	2%	1%	3%
No, we receive no requests for ebooks	1%	0%	0%	0%	1%	0%	0%	0%
2011								
Yes, dramatic increase	45%	69%	76%	80%	36%	67%	70%	83%
Yes, slight increase	41%	29%	22%	14%	48%	28%	26%	16%
No, request level is unchanged	6%	1%	2%	5%	7%	3%	3%	1%
No, we receive no requests for ebooks	8%	0%	1%	1%	9%	2%	0%	1%

Ebook Formats and Devices

In last year’s study, we found that competing ebook formats and hardware devices were a substantial barrier to offering ebooks to library users. Has the format morass cleared up at all in the past year?

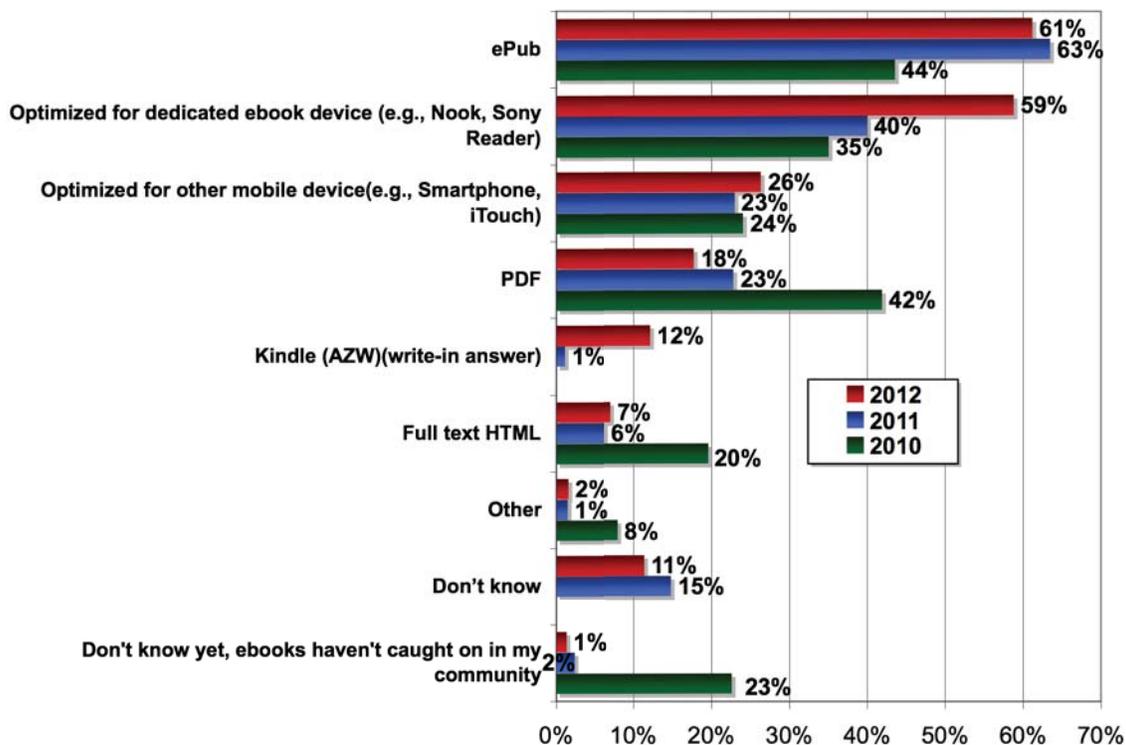
Ebook Formats

The “ePub” format remains the preferred ebook format. At 61% it has slipped two percentage points from last year, but it is still well above the 44% cited in our 2010 survey. What has grown by leaps and bounds is “optimized for dedicated ebook devices,” which debuted in 2010 at 35%, climbed to 40% last year, and now, in 2012, is up to 59%. Each year more people get Kindles and Nooks, and look for compatible content. Twelve percent of respondents specifically wrote in “Kindle format.”

“Optimized for other mobile device” is up three points to 26%, and this category likely includes tablets like the iPad. The iPad blurs some of these categories; ePub is the default format for Apple’s iBooks, but both Barnes & Noble and Amazon have apps that let users read Nook and Kindle ebooks, respectively, on iPads.

We also note that only 1% selected “Don’t know yet, ebooks haven’t caught on”—this was at 23% in 2010.

Figure 13. In which format do users generally prefer ebooks? (multiple responses permitted)
% of public libraries



**Table 10. In which format do users generally prefer ebooks?
% of public libraries by population served and materials budget**

	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
ePub	51%	64%	70%	65%	46%	60%	71%	66%
Optimized for dedicated ebook device (e.g., Nook, Sony Reader)	53%	64%	58%	62%	55%	61%	54%	64%
Optimized for other mobile device (e.g., Smartphone, iTouch)	19%	31%	27%	35%	18%	27%	28%	36%
PDF	14%	17%	22%	19%	15%	16%	19%	21%
Kindle (AZW)(write-in answer)	11%	9%	17%	14%	11%	11%	15%	12%
Full text HTML	4%	7%	8%	11%	2%	7%	10%	7%
Don't know yet, ebooks haven't caught on in my community	3%	1%	0%	0%	5%	0%	0%	1%
Other	1%	2%	2%	0%	2%	0%	1%	5%
Don't know	17%	9%	8%	8%	16%	12%	9%	9%
2011								
ePub	57%	63%	66%	69%	51%	60%	65%	73%
Optimized for dedicated ebook device (e.g., Nook, Sony Reader)	44%	42%	37%	38%	48%	41%	38%	39%
Optimized for other mobile device (e.g., Smartphone, iTouch)	18%	23%	26%	28%	19%	20%	24%	26%
PDF	19%	25%	23%	25%	20%	19%	25%	25%
Full text HTML	5%	7%	6%	8%	6%	5%	6%	8%
Don't know yet, ebooks haven't caught on in my community	4%	3%	2%	0%	6%	2%	3%	0%
Other	2%	2%	1%	2%	1%	2%	2%	1%
Don't know	18%	13%	15%	12%	17%	20%	12%	10%

Hardware Devices

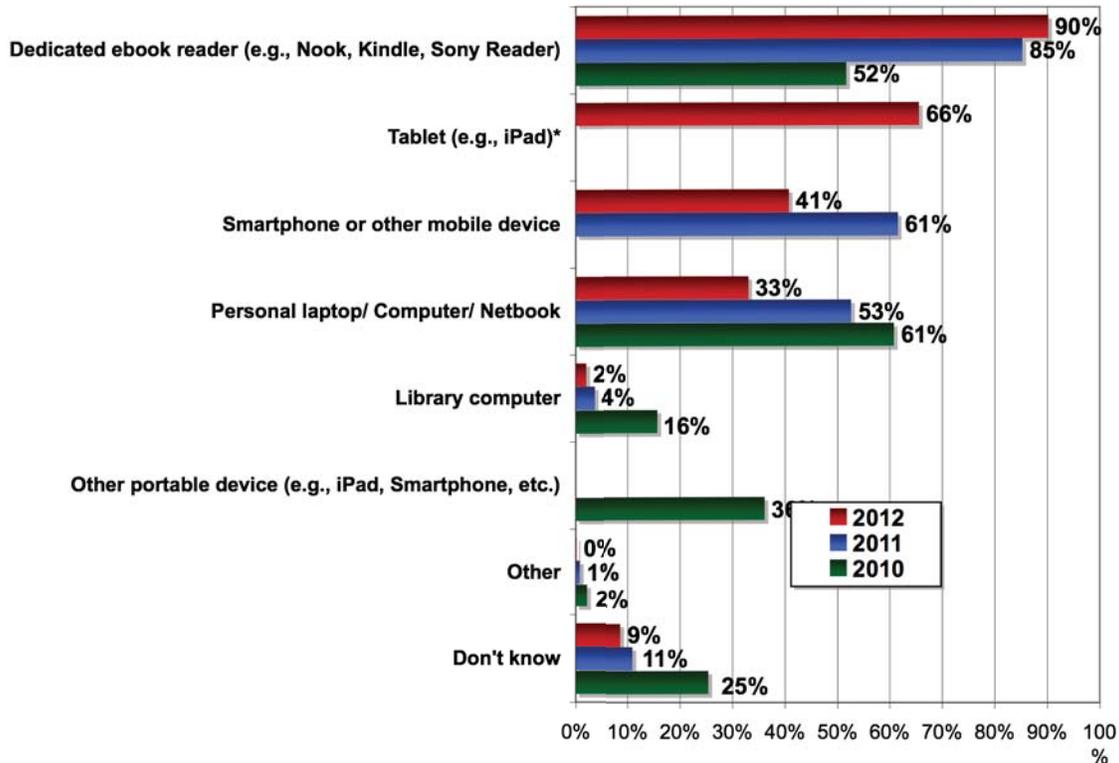
We again asked about specific hardware devices that library users use to read ebooks.

Dedicated ebook readers are increasingly preferred, selected by 90% of public library respondents, up from 85% last year, and up dramatically from 52% in 2010. On our 2012 survey, we added “tablet (e.g. iPad)” and it came in at 66%. As we remarked in the last question, Barnes & Noble and Amazon apps allow users to read Nook and Kindle ebooks on the iPad.

Breaking out “tablet” from “smartphone or other mobile device” likely helped that latter category drop from 61% to 41%. And the “personal laptop/computer” continues to decline—it was at 61% in 2010 and has dropped two years later to 33%. It’s a safe bet the tablet will begin displacing the laptop (for ebook reading as well as many other functions) within the next few years.

Library staff are also becoming more knowledgeable about ebooks and user preferences; those who “don’t know” what hardware devices are used continues to drop—from 25% in 2010, to 11% in 2011, to 9% in 2012.

Figure 14. What device(s) do your library users most often use to read ebooks? (multiple responses permitted)
% of public libraries



* Added to 2012 survey

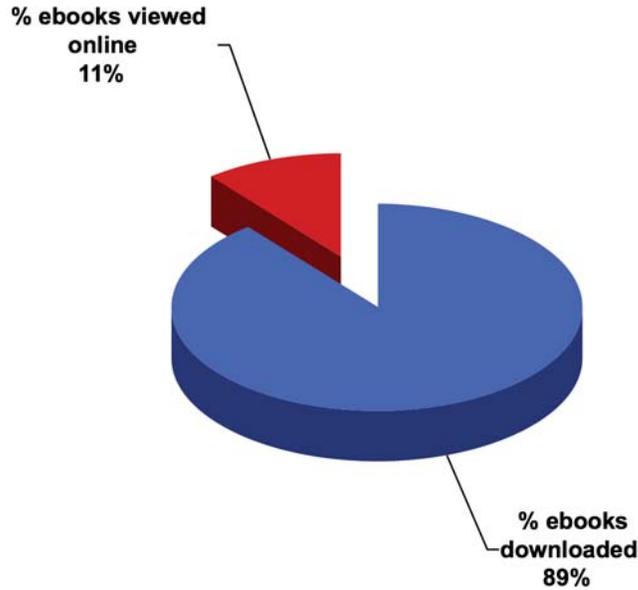
**Table 11. What device(s) do your library users most often use to read ebooks?
% public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
Dedicated ebook reader(e.g., Nook, Kindle, Sony Reader)	91%	90%	89%	92%	90%	89%	91%	93%
Tablet (e.g., iPad)	55%	72%	67%	86%	55%	62%	73%	77%
Smartphone or other mobile device	32%	44%	42%	67%	34%	34%	47%	54%
Personal laptop/ Computer/ Netbook	29%	32%	37%	47%	31%	25%	35%	46%
Library computer	3%	1%	1%	8%	4%	1%	1%	5%
Other	1%	0%	0%	0%	0%	0%	1%	0%
Don't know	7%	9%	10%	8%	9%	11%	6%	5%
2011								
Dedicated ebook reader (Nook, Kindle, Sony)	83%	88%	84%	83%	80%	86%	88%	85%
Other portable device (iPad, smartphone, etc.)	51%	63%	66%	65%	51%	56%	62%	72%
Personal laptop/ Computer/Netbook	42%	52%	55%	61%	49%	45%	53%	59%
Library computer	5%	3%	4%	4%	7%	2%	3%	4%
Other	1%	0%	1%	0%	1%	1%	0%	1%
Don't know	10%	9%	13%	15%	10%	12%	9%	12%

Downloaded Ebooks vs. Online Ebooks

What percentage of ebook circulation is physically downloaded, and what percentage is viewed online (new question in 2012)? Turns out the vast majority of ebook titles (89%) are physically downloaded, while only 11% are viewed online.

**Figure 15. What percent of your library ebook usage would you estimate consists of downloaded ebooks vs. ebooks viewed online?
% of public libraries**



The ratio does not change appreciably by size of library.

**Table 12. What percent of your library ebook usage would you estimate consists of downloaded ebooks vs. ebooks viewed online?
% of public libraries by population served and materials budget**

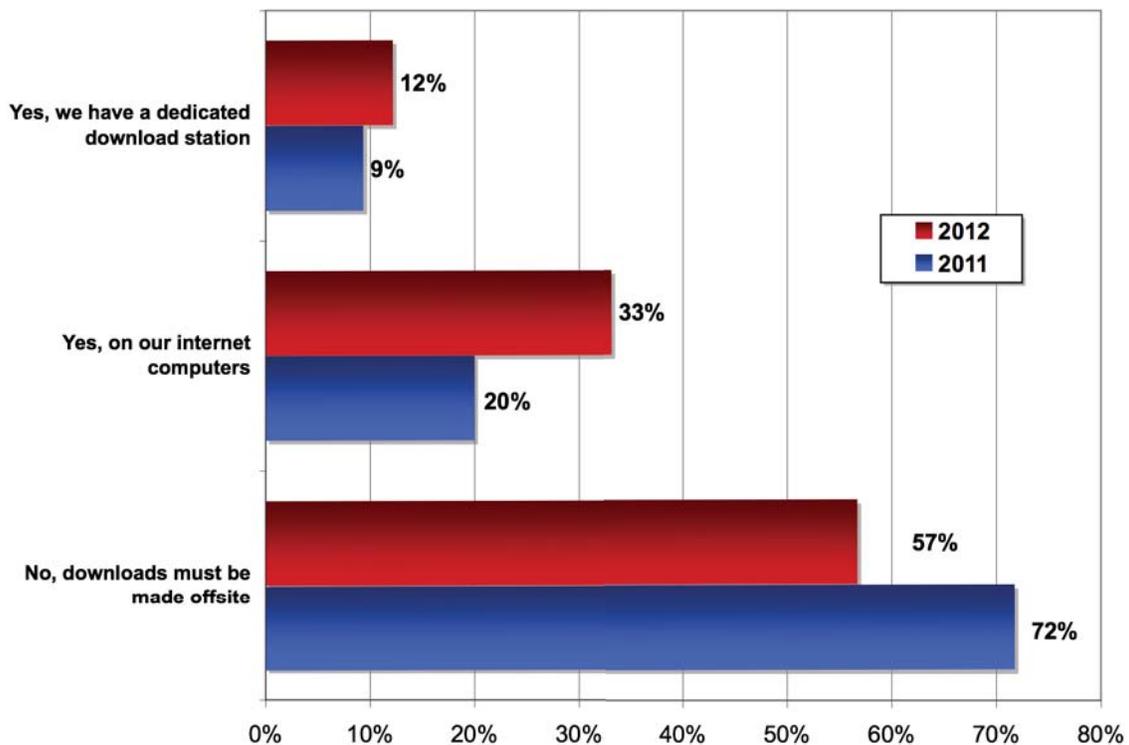
	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
% ebooks downloaded	89.4	90.3	89.8	84.5	87.5	92.3	88.8	87.4
% ebooks viewed online	10.6	9.7	10.2	15.5	12.5	7.7	11.2	12.6

Onsite vs. Offsite Ebook Downloading

One-third (33%) of respondents allow users to download ebooks on the library's own Internet computers (up from 20%), while another 12% (up from 9%) have a dedicated ebook download station. The majority—albeit a shrinking one (down from 72% last year to 56% this year)—require that downloads be made offsite.

This isn't always up to libraries. Some vendors'/publishers' licensing agreements preclude libraries from being able to offer onsite computers for ebook downloading purposes. However, users with their own portable computers or ebook readers can download ebooks from within the library, which seems a little contradictory.

**Figure 16. Are users able to download ebooks to their own devices inside your library?
% of public libraries**



The larger the library, the more likely it is to have a dedicated ebook download station, but less likely to allow users to download ebooks on their Internet computers.

**Table 13. Are users able to download ebooks to their own devices inside your library?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
Yes, we have a dedicated download station	8%	13%	15%	11%	9%	9%	12%	18%
Yes, on our internet computers	41%	35%	23%	25%	41%	35%	32%	28%
No, downloads must be made offsite	52%	52%	65%	67%	50%	58%	59%	57%
2011								
Yes, we have a dedicated download station	7%	10%	10%	7%	7%	10%	9%	9%
Yes, on our internet computers	31%	22%	13%	11%	36%	23%	18%	14%
No, downloads must be made offsite	62%	69%	78%	81%	59%	69%	75%	78%

Ebook Categories

Ebooks are increasingly available in just about every category in which printed books are available. While it's true that newer rather than older titles tend to be more readily available, more and more backlist titles are being converted to one ebook format or another. Public domain titles are available online through providers like Project Gutenberg.

While all ebook categories have grown—"general adult fiction (including backlist)" remains the top category of ebooks public libraries offer users, growing to 97% from 92% last year (and 84% in 2010). "Bestsellers" continued to climb, from 76% of libraries in 2010, to 90% in 2011, to an all-time high of 95% in 2012. "General adult nonfiction" jumped to 92% from 87% (where it had been in 2010).

Much of the growth this time around is in the young adult and children's categories—fiction, nonfiction, and picture books are all at record highs.

We grouped the young adult and children's categories to obtain some net figures:

- Net Young Adult: 91%, up from 80% last year and from 69% in 2010.
- Net Children: 87%, up from 76% last year and from 57% in 2010.

Figure 17. Which categories of ebooks does your library currently offer users? (multiple responses permitted)
% of public libraries

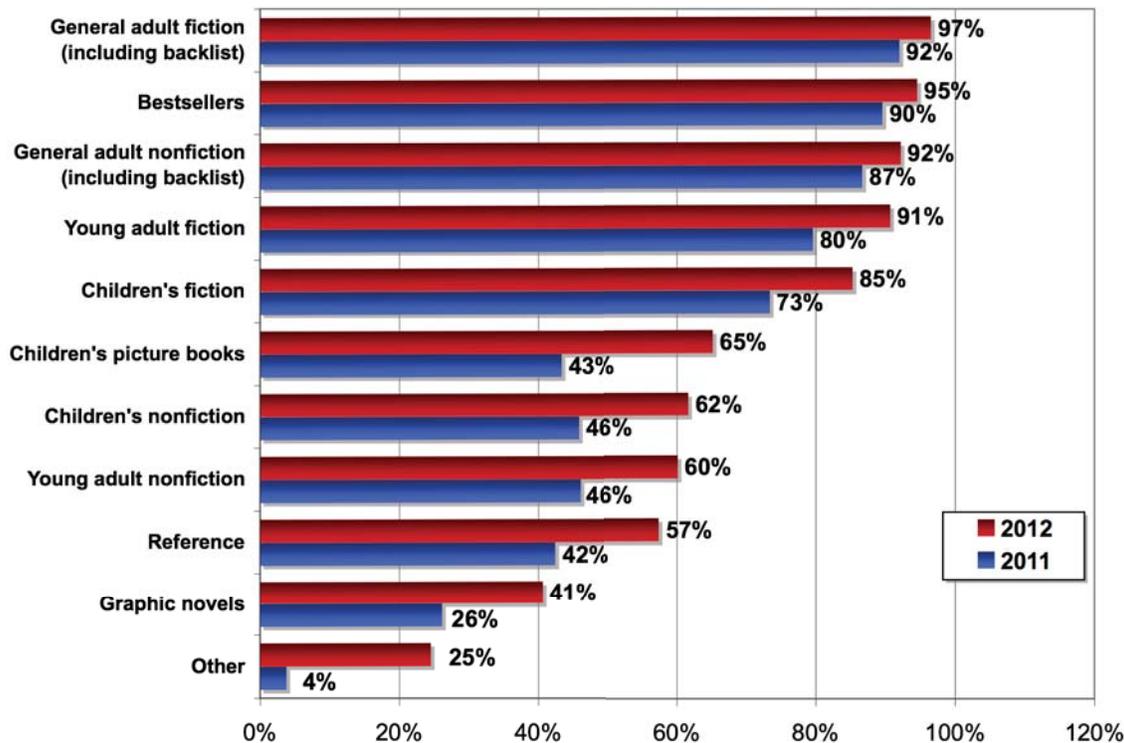


Table 14. Which categories of ebooks does your library currently offer users?
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
General adult fiction (including backlist)	96%	96%	97%	100%	97%	96%	95%	99%
Bestsellers	92%	96%	96%	97%	91%	96%	94%	96%
General adult nonfiction (including backlist)	89%	91%	96%	97%	88%	93%	91%	96%
Young adult fiction	89%	90%	93%	95%	86%	90%	94%	96%
Children's fiction	84%	85%	87%	92%	83%	83%	89%	89%
Children's picture books	63%	65%	67%	76%	63%	59%	67%	78%
Children's nonfiction	58%	62%	64%	76%	53%	61%	63%	74%
Young adult nonfiction	60%	62%	56%	78%	53%	63%	58%	74%
Reference	48%	54%	69%	76%	45%	49%	65%	73%
Graphic novels	39%	42%	39%	59%	39%	37%	40%	56%
Other	28%	27%	20%	24%	25%	22%	27%	29%
NET YA	89%	90%	93%	95%	86%	90%	94%	96%
NET CHILDRENS	85%	87%	90%	92%	85%	83%	92%	90%
2011								
General adult fiction (including backlist)	89%	92%	92%	97%	86%	90%	94%	96%
Bestsellers	84%	90%	90%	97%	82%	86%	93%	94%

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
General adult nonfiction (including backlist)	83%	85%	86%	99%	77%	85%	86%	95%
Young adult fiction	76%	74%	86%	85%	70%	75%	84%	86%
Children's fiction	65%	72%	77%	87%	60%	69%	74%	87%
Young adult nonfiction	40%	40%	52%	63%	35%	44%	44%	60%
Children's nonfiction	41%	43%	48%	65%	37%	43%	44%	62%
Children's picture books	35%	41%	49%	55%	33%	39%	42%	57%
Reference	34%	38%	47%	67%	29%	40%	41%	56%
Graphic novels	19%	22%	29%	48%	17%	20%	25%	41%
Other	6%	3%	4%	4%	6%	5%	2%	4%
NET YA	76%	75%	86%	85%	71%	76%	84%	86%
NET CHILDRENS	69%	74%	78%	88%	64%	72%	76%	89%

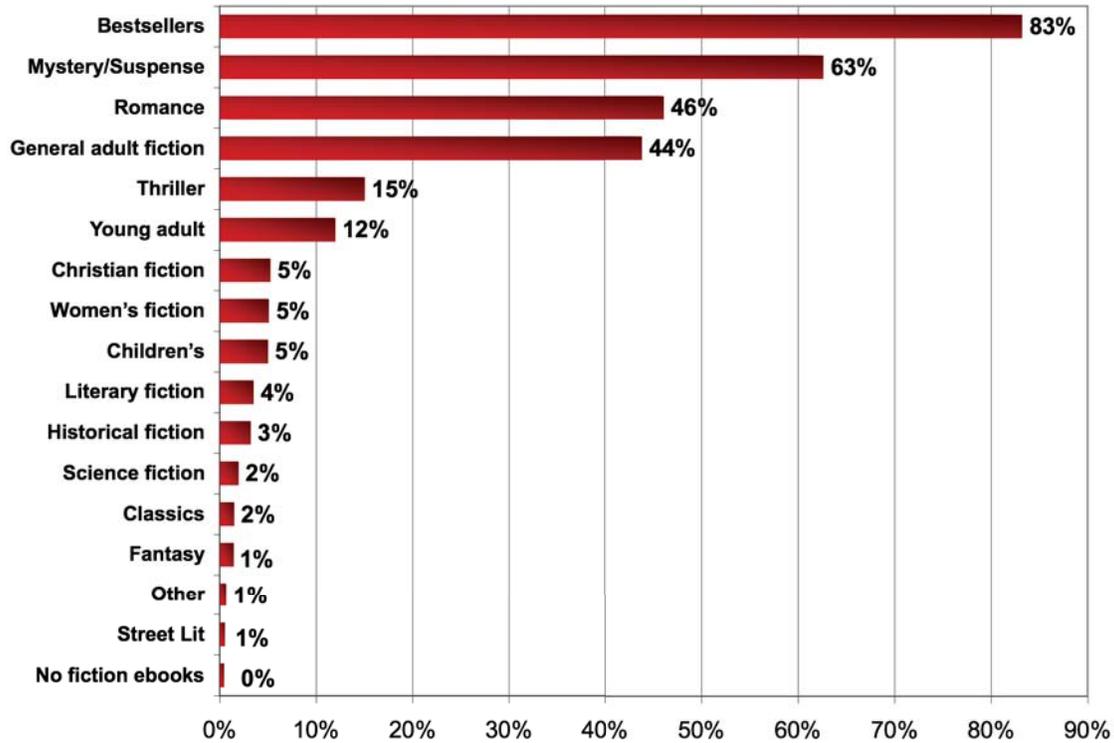
Top Circulating Fiction Categories

Drilling down into fiction ebooks, we asked our public library respondents to select their *top three* circulating or most requested fiction categories. For the sake of legibility and clarity, we present the 2012 data in Figure 18 and 2011's in Figure 19.

“Bestsellers” not unexpectedly came out on top at 83%, retreating to its 2010 level from a high of 90% in 2011. “Mystery/suspense” remains unchanged at 63% and users have been kindling a love for “romance,” which is up to a record high of 46% (up from 38% last year and 30% in 2010). Some speculate that the reason romance does so well in electronic format is that titles and covers are hidden, protecting the reader from potential embarrassment.

On the other hand, “general adult fiction” drops to an all-time low of 46%, down from 53% last year and 48% in 2010. “Classics” are also at an all-time low of 2%. “Thriller” remains stable at 15% of public library respondents.

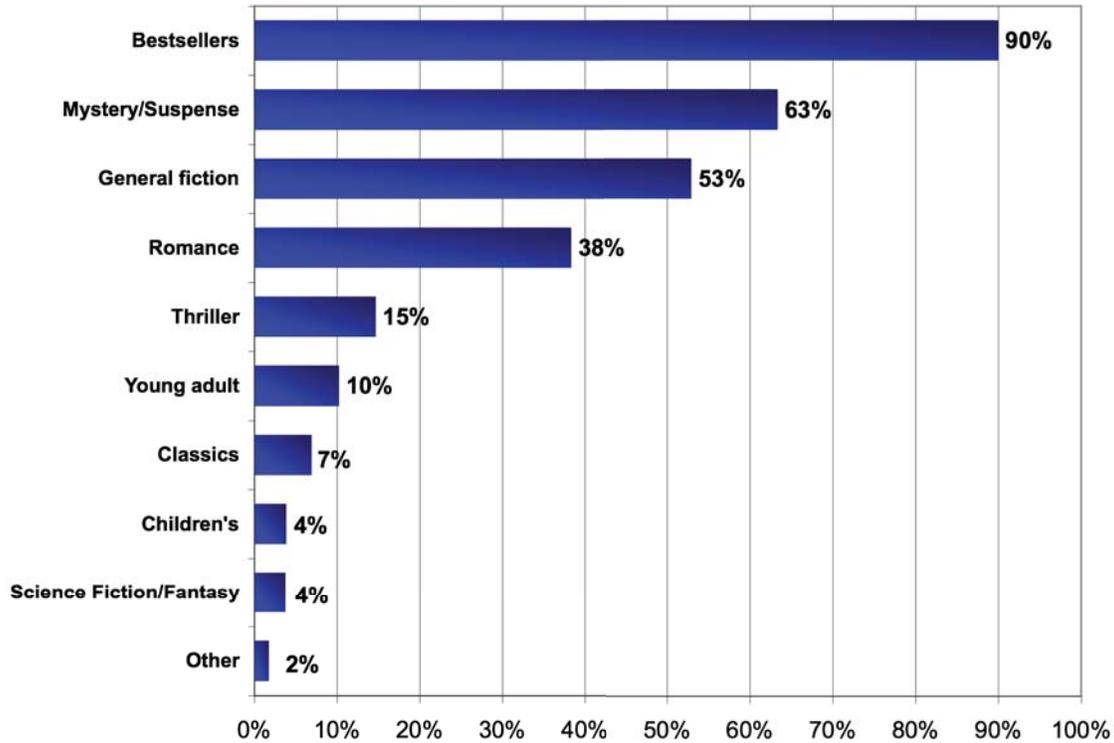
**Figure 18. What are your top three circulating or most requested fiction ebook categories? (multiple responses permitted)
% of public libraries (2012 Survey)**



**Table 15. What are your top three circulating or most requested fiction ebook categories? (multiple responses permitted)
% of public libraries by population served and materials budget (2012 Survey)**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Bestsellers	83%	83%	81%	85%	81%	89%	80%	78%
Mystery/Suspense	62%	59%	68%	62%	65%	58%	68%	60%
Romance	38%	45%	57%	56%	38%	39%	50%	65%
General adult fiction	44%	45%	41%	44%	42%	44%	42%	48%
Thriller	15%	16%	17%	9%	16%	16%	16%	9%
Young adult	8%	13%	14%	9%	10%	12%	15%	5%
Christian fiction	10%	5%	2%	0%	13%	4%	3%	3%
Women's fiction	8%	3%	4%	3%	9%	4%	4%	3%
Children's	4%	7%	2%	12%	5%	3%	7%	5%
Literary fiction	5%	3%	2%	3%	3%	7%	1%	1%
Historical fiction	3%	3%	3%	6%	3%	3%	2%	5%
Science fiction	2%	1%	4%	0%	2%	1%	2%	3%
Classics	2%	3%	1%	0%	2%	2%	1%	3%
Fantasy	3%	1%	1%	0%	4%	1%	0%	1%
Street Lit	0%	1%	1%	0%	0%	0%	1%	1%
Other	1%	1%	0%	0%	2%	1%	0%	0%
No fiction ebooks	1%	1%	0%	0%	0%	1%	1%	0%

**Figure 19. What are your top three circulating or most requested fiction ebook categories? (multiple responses permitted)
% of public libraries (2011 survey)**



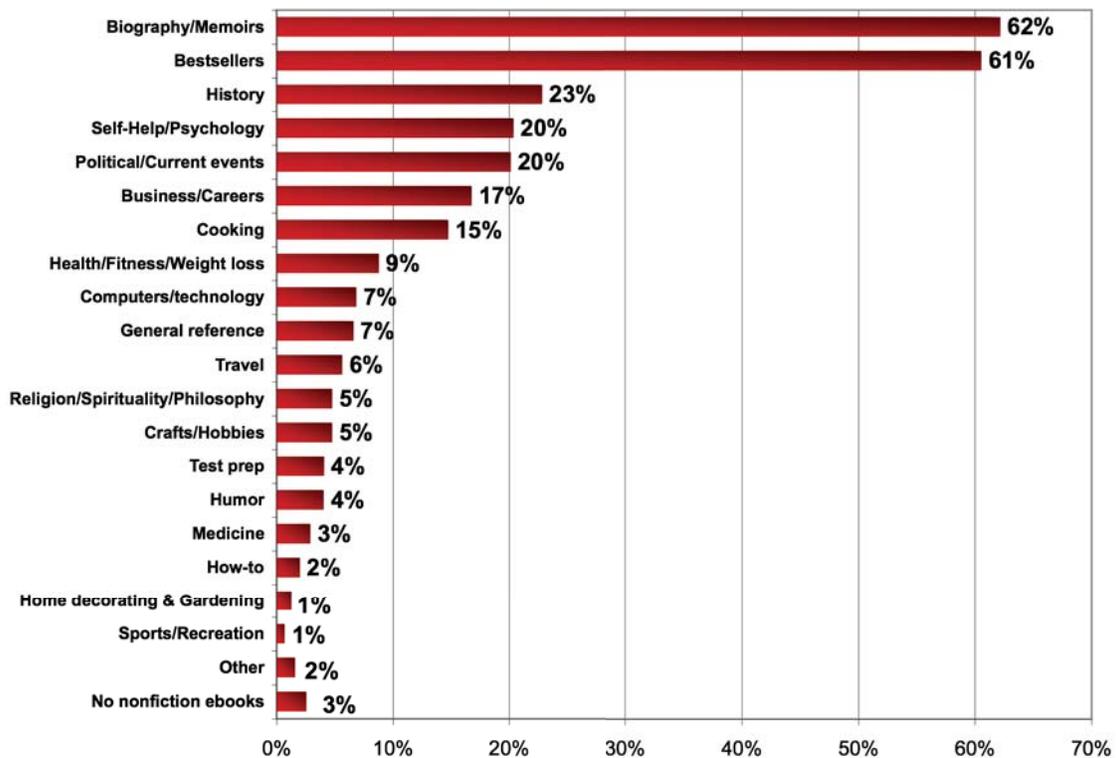
**Table 16. What are your top three circulating or most requested fiction ebook categories? (multiple responses permitted)
% of public libraries by population served and materials budget (2011 survey)**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Bestsellers	89%	90%	90%	88%	89%	87%	92%	91%
Mystery/Suspense	66%	65%	60%	63%	66%	63%	65%	61%
General fiction	51%	57%	52%	44%	47%	57%	54%	52%
Romance	31%	36%	41%	57%	31%	34%	37%	50%
Thriller	15%	14%	14%	13%	16%	14%	14%	16%
Young adult	11%	9%	11%	7%	12%	12%	9%	7%
Classics	7%	8%	6%	7%	8%	8%	7%	5%
Children's	6%	3%	4%	1%	5%	4%	6%	2%
Science Fiction/Fantasy	4%	5%	4%	1%	7%	5%	3%	2%
Other	2%	2%	1%	3%	3%	2%	1%	3%

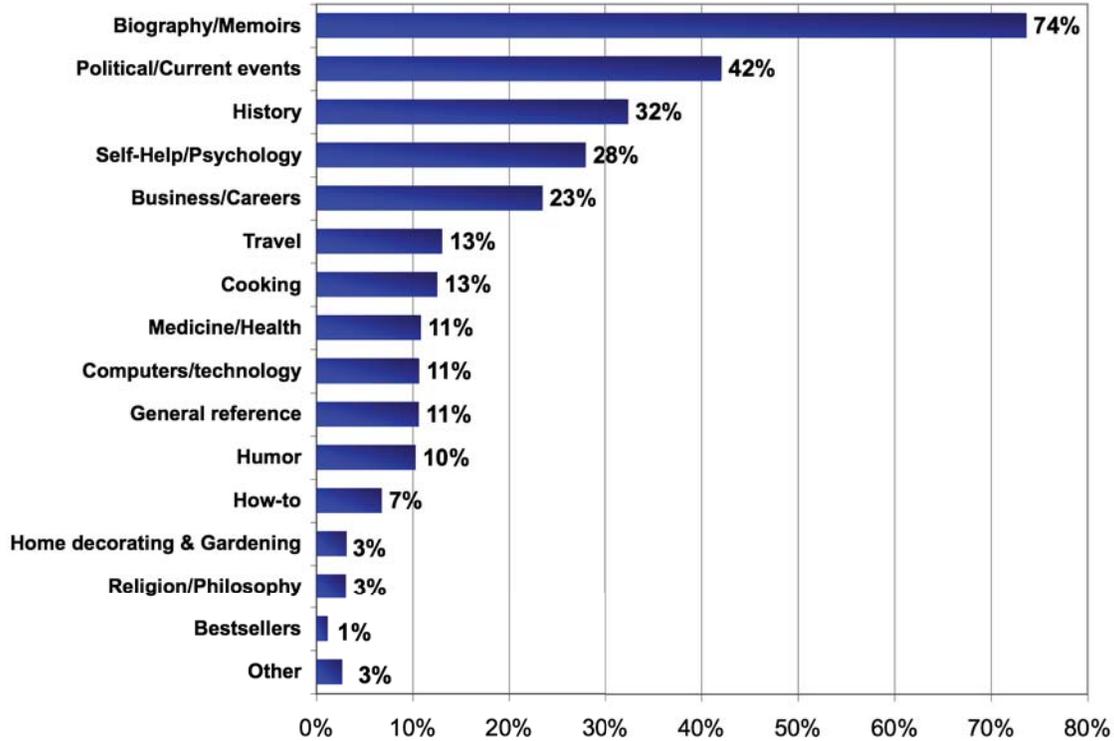
Top Circulating Nonfiction Categories

Likewise, we asked public libraries to choose their *top three* circulating or most requested nonfiction ebook categories. The 2012 survey data are presented in Figure 20 and 2011 data in Figure 21. Most non-fiction categories seem to have declined from last year to this year. “Biography/memoirs” ebbed considerably to 62% from 74%, but is still up from 50% in 2010. “Bestsellers,” a new choice added in 2012, came in at 61% (in 2011 it was a write-in selection). “History” drops back to 23% from 32% last year, and “self-help/psychology” drops from 28% to 20%.

**Figure 20. What are your top three circulating or most requested nonfiction ebook categories? (multiple responses permitted)
% of public libraries (2012 Survey)**



**Figure 21. What are your top three circulating or most requested nonfiction ebook categories? (multiple responses permitted)
% of public libraries (2011 survey)**



**Table 17. What are your top three circulating or most requested nonfiction ebook categories? (multiple responses permitted)
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Biography/Memoirs	60%	66%	60%	66%	59%	66%	62%	61%
Bestsellers	55%	58%	67%	66%	47%	63%	64%	65%
History	23%	24%	19%	22%	21%	23%	23%	24%
Self-Help/Psychology	15%	22%	26%	19%	22%	13%	21%	25%
Political/Current events	17%	22%	21%	6%	20%	20%	19%	16%
Business/Careers	10%	17%	22%	31%	9%	14%	19%	27%
Cooking	18%	13%	15%	9%	16%	17%	16%	12%
Health/Fitness/Weight loss	7%	10%	11%	6%	4%	8%	12%	9%
Computers/technology	6%	4%	10%	9%	4%	8%	8%	5%
General reference	7%	10%	3%	3%	4%	8%	6%	8%
Travel	4%	7%	7%	6%	4%	6%	7%	7%
Religion/Spirituality/Philosophy	5%	6%	3%	6%	3%	6%	5%	7%
Crafts/Hobbies	5%	5%	4%	3%	5%	6%	4%	4%
Test prep	2%	1%	7%	9%	3%	3%	5%	4%
Humor	6%	4%	2%	6%	8%	6%	2%	1%
Medicine	4%	4%	1%	0%	4%	4%	2%	1%

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
How-to	2%	2%	1%	6%	3%	1%	2%	3%
Home decorating & Gardening	2%	1%	0%	3%	3%	1%	1%	0%
Sports/Recreation	2%	0%	0%	0%	3%	0%	0%	0%
Other	3%	1%	2%	0%	2%	3%	2%	0%
No nonfiction ebooks	5%	1%	1%	0%	9%	1%	1%	0%
2011								
Biography/Memoirs	77%	74%	73%	65%	76%	77%	72%	71%
Political/Current events	41%	46%	40%	33%	38%	48%	40%	40%
History	31%	33%	38%	24%	29%	36%	32%	31%
Self-Help/Psychology	18%	30%	27%	44%	23%	24%	29%	34%
Business/Careers	15%	19%	25%	50%	12%	14%	24%	39%
Travel	18%	14%	10%	8%	15%	15%	13%	12%
Cooking	12%	10%	17%	8%	14%	9%	14%	13%
Medicine/Health	12%	11%	8%	14%	14%	9%	10%	11%
Computers/technology	10%	9%	10%	20%	8%	9%	12%	12%
General reference	11%	10%	12%	8%	14%	8%	12%	9%
Humor	12%	10%	10%	11%	10%	12%	12%	9%
How-to	9%	8%	4%	5%	13%	5%	7%	4%
Home decorating & Gardening	4%	2%	4%	2%	3%	3%	5%	1%
Religion/Philosophy	3%	3%	4%	0%	5%	3%	2%	2%
Bestsellers (write-in)	1%	2%	1%	2%	1%	2%	1%	1%
Other	2%	2%	4%	2%	2%	3%	2%	3%

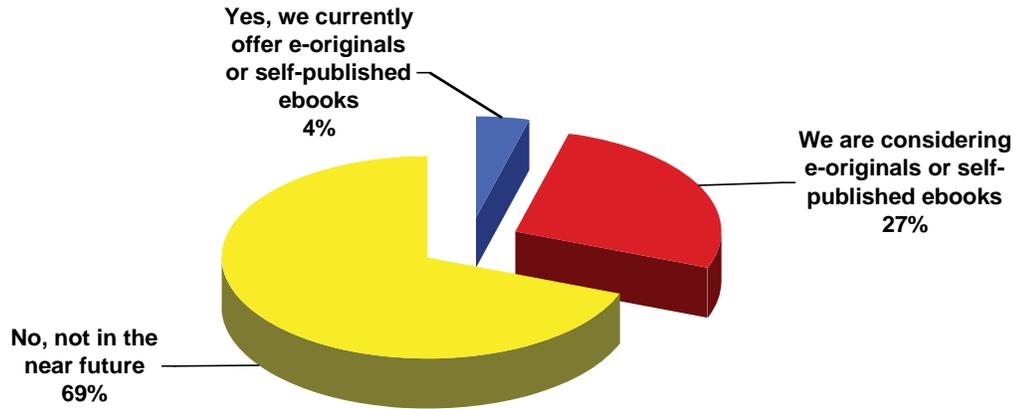
Self-Published Titles

Ebooks, like on-demand digital printing, have proven to be a boon for small or self publishers. Authors who write well on compelling topics, but who never managed to crack the mainstream publishing market with its massive barriers to entry, can get their work out to the public. Physical production costs for ebooks are essentially non-existent (depending upon how much an author/publisher wants to invest in design), and distribution, especially via Amazon or through direct e-commerce, opens up the market in ways that were not possible under the traditional book publishing model.

Still, the traditional publishing model, though far from perfect, offers some level of quality control. Without that level of quality control, what guarantee is there that any given self-published ebook is decently written—or, if nonfiction, is free from error, potential legal issues, and other problems? It essentially moves the “slush pile” (publishers’ term for unsolicited manuscripts) from publishers’ dark, dank cellars into online bookstores—or libraries.

The issue for libraries is, should they carry self-published ebooks? Only 4% of public libraries currently offer self-published ebooks. And for now, the majority—69%—have no plans to purchase self-published ebooks, although 27% are considering it.

Figure 22. Is your library considering purchasing and/or licensing ebook originals or self-published ebooks?
% of public libraries



Larger libraries and libraries with the biggest budgets, are more likely to acquire self-published titles. This is logical; with minimal resources it is hard enough to keep up with mainstream published titles without taking a chance on a risky self-published original.

Table 18. Is your library considering purchasing and/or licensing ebook originals or self-published ebooks?
% of public libraries by population served and materials budget

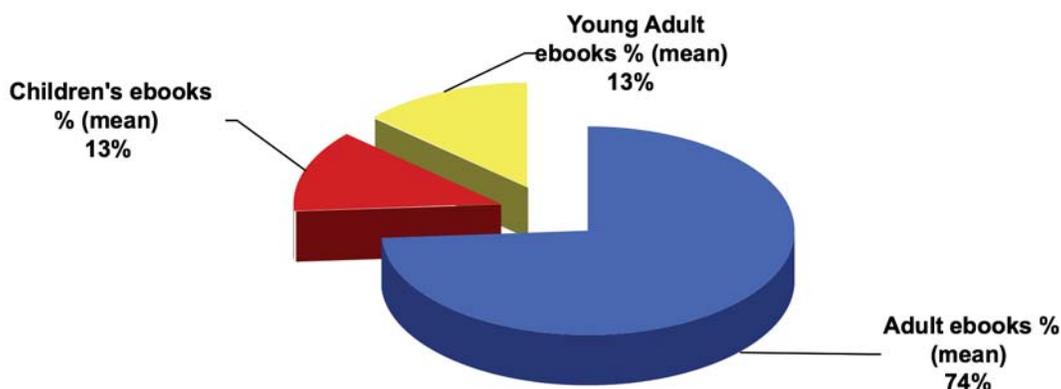
	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes, we currently offer e-originals or self published ebooks	2%	1%	7%	16%	0%	4%	3%	10%
We are considering e-originals or self-published ebooks	25%	18%	39%	32%	28%	21%	25%	37%
No, not in the near future	73%	81%	54%	52%	72%	75%	72%	53%

Age Breakdown of Ebooks

In a previous section, we noted that public libraries were seeing increases in the circulation of young adult and children’s titles. These two markets are in many ways well-suited to ebooks: today’s young adults and kids have grown up in an all-digital world and, while this is a generalization, have been exposed to electronic devices and electronic content literally since they were born. So they are a prime audience for ebooks. Still, older folks are also a prime ebook market, for the simple reason that adjustable type sizes can make ebooks easier to read.

That said, what is the ratio of adult to non-adult ebook titles carried by public libraries? On average, three-fourths (74%) of public libraries’ ebook collections are adult titles, with children’s and young adult ebooks each accounting for 13% of libraries’ collections.

Figure 23. Approximately what is the breakdown of adult versus children’s versus young adult ebooks available in your library?
% of public libraries



There aren’t any meaningful differences by population served or budget, save that small libraries are slightly less inclined to offer children’s and YA ebook titles.

Table 19. Approximately what is the breakdown of adult versus children’s versus young adult ebooks available in your library?
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Adult ebooks % (mean)	74.8	73.0	74.1	72.2	74.7	75.4	72.6	71.4
Children’s ebooks % (mean)	12.7	13.2	12.5	14.7	12.8	12.3	13.4	14.0
Young Adult ebooks % (mean)	12.5	13.8	13.5	13.1	12.5	12.3	14.0	14.6

Top Age Group Accessing Ebooks

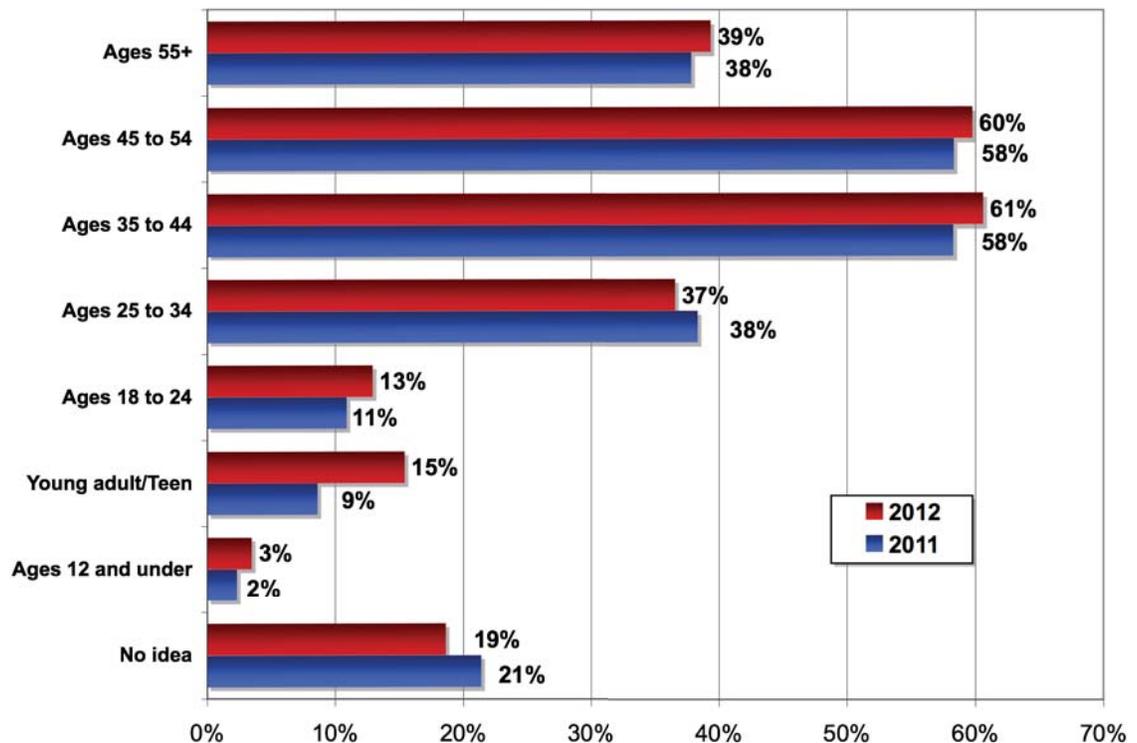
Each year, we ask librarians what age groups tend to access their library's ebook content, and the numbers have not varied substantially in this survey.

The age group that comprises the most active users of public library ebooks is the 35-to-44 range, cited by 31% of libraries, up three percentage points from last year's survey. Just behind is the 45-to-54 group. This group had been at 42% of libraries in our 2010, jumped up last year to 58%, and now climbs only two more percentage points to 60%. Likewise, in 2010, the over-55 crowd was cited by 21% of public librarians; in 2011 it jumped to 38%, and now ticks one point higher to 39%.

At the other end of the spectrum, in 2010, 7% of librarians said that young adults/teens were active ebook users, which crept up to 9% in 2011 and is now at 15% in 2012. Whether this is due to a more active interest in ebooks or the increased availability of age-appropriate electronic titles is unknown.

At the same time, librarians are becoming more cognizant of their users; 19% of respondents admitted that they had "no idea," an all-time low for this response. However, when users are allowed to access ebook content remotely, it is not easy to determine any kind of demographic information about users.

Figure 24. If possible, please identify three age groups you perceive to be the most active ebook users in your library (multiple responses permitted)
% of public libraries



Libraries that serve the largest populations are most likely to report younger users as the most active in accessing ebook content. This is up quite a bit from 2011.

Table 20. If possible, please identify three age groups you perceive to be the most active ebook users in your library (multiple responses permitted)
% of public libraries by population served and materials budget

	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Ages 55+	43%	43%	32%	41%	45%	40%	38%	39%
Ages 45-54	59%	65%	56%	53%	53%	64%	60%	59%
Ages 35 to 44	59%	63%	60%	59%	57%	60%	61%	63%
Ages 25 to 34	34%	32%	43%	44%	38%	29%	38%	44%
Ages 18 to 24	12%	6%	18%	29%	15%	5%	13%	20%
Young adult/Teen	16%	17%	13%	18%	21%	15%	15%	15%
Ages 12 and under	4%	6%	2%	0%	5%	3%	4%	1%
No idea	18%	17%	21%	18%	14%	21%	21%	17%
2011								
Ages 55+	39%	38%	39%	27%	40%	40%	39%	30%
Ages 45-54	60%	62%	52%	53%	61%	60%	59%	55%
Ages 35 to 44	60%	60%	55%	55%	63%	58%	57%	57%
Ages 25 to 34	30%	42%	37%	45%	39%	29%	41%	45%
Ages 18 to 24	8%	9%	14%	13%	12%	10%	8%	12%
Young adult/Teen	9%	7%	11%	3%	9%	7%	12%	5%
Ages 12 and under	3%	2%	3%	0%	4%	2%	2%	1%
No idea	18%	20%	23%	31%	11%	24%	20%	27%

General Conclusions

Ebooks are in libraries. There is no question about that; in 2010, when we began these surveys, less than three-fourths of public libraries carried ebook titles. Only two years later, just about 90% of public libraries offer ebooks to users. In general, the only substantial barrier is cost.

At the present, libraries have reported dramatically heightened demand from users, and have been increasing their collections correspondingly—from an average number of ebooks in 2010 of around 1,500, to 4,300 in 2011, to more than 10,000 in 2012.

Each year, especially around the holiday season, more and more people get hardware ereaders—whether dedicated book readers like Kindle or Nook, or tablets like an iPad—and they come into the library (or access the library remotely) looking for ebooks to check out. The fact that libraries have seen a surge in children and teens accessing ebook content suggests that ebooks will be around for a while as young people grow up comfortable with the technology.

As the verbatim comments below—and at the ends of other sections of this report—indicate, librarians are increasingly comfortable with ebooks and are settling into their roles as not only librarians but technical support experts as well. The most proactive libraries even offer classes in ebooks to interested library users.

In Their Own Words...

On our questionnaire, we asked libraries “If you have any comments about ebooks in your library, please write them below.” We include here—and at the ends of Chapters 3 and 4—a sampling of the write-in responses we received (lightly edited). We did not include all of them, but feel they give a valuable “qualitative” interpretation of the quantitative data presented throughout this report.

- As a small library, streaming content is the only affordable option. But for users of anything but dedicated e-book readers this may be the future anyhow. Why have a file physically on the client device, why not leave it in the cloud and just share access?
- Biggest problems are availability (including being priced out by certain publishers) and format (epub/pdf/etc)
- Budget keeps us from participating in e-books except for free ones in the public domain.
- We’re concerned about how the Big 6 publishers are not all on same page and do not want to work well with libraries and therefore, we cannot offer patrons what they request.
- Consortial use benefits our small library; but we are concerned about the pricing.
- Demand has escalated dramatically; desperate to get big six to relax policies of not allowing sales to libraries; bestsellers and popular titles not available; having to buy works by unknown authors or only backlist titles; need a way to allow patrons to donate ebooks to our collection.
- Ebooks are a growing area of collection, but current pricing structure and difficulty of use make us reluctant to devote too much of our budget to them.
- Ebooks are exploding right now in my library. We have held a couple of user classes to help patrons get familiar with the whole downloading process and already we are seeing ebook circulation increasing dramatically. Not even 1/2 way through the year and we have already exceeded ebook circulation for 2011! Most of the users I see are over 30 but a few young kids are starting to get ereaders for birthdays and Christmas so I’m going to be holding a class geared to them in the coming months.
- Ebooks are very popular in our library. I would like to see the publishers work with libraries to establish a new model for this service.
- Ebooks are very popular, but due to high unemployment rates, many of our customers are unable to afford ebook readers.

- Ebooks have drawn a new population of readers into the library. This technology opened an avenue to a greater exploration of knowledge and inspiration.
- Ebooks have caught on very quickly especially with the older population. The waiting lists for bestsellers can be as much as the printed books now.
- Ereaders have become so affordable for the public and they are willing to buy a couple of books. After those initial purchases, they come to the library looking for the content. It has been very difficult to help the public understand why there is not enough content available through the library. When staff tries to explain the costs and that only two of the big six are working with libraries, some are stunned and others walk away shaking their heads. Publishers have got to get on board and work with us, not against us.
- I am an advocate for ebooks in public libraries and I have had my head handed to me for it. Ebooks are the now and the future. Publishers are pulling assets out of print and putting those resources into electronic publishing. Authors are self-publishing and bypassing publishers altogether. Bookstores are closing. Circulation of “traditional” materials at public libraries is dropping while the demand for downloadable electronic materials is rising rapidly. It is time for our profession to stop making excuses for why ebooks are bad for society. It gets old hearing why libraries should devote only paltry sums of money to develop a token collection of ebooks, when society as a whole is moving forward at a much faster pace. I think more and more people are simply bypassing public libraries (my library included) and just getting what they want from vendors like Amazon. ALA should have been working with ebook publishers years ago to make sure that libraries had a meaningful place at the table. Instead, ALA did nothing significant until 2012 to work with publishers to make libraries an important part of the ebook model. Instead, many in ALA had for years been busily embracing the print future because it was more comfortable and easier for them to do, despite the fact that it had nothing to do with where the world was actually headed. Yes, I have heard all of the digital divide debates. I have had people tell me that they need to feel the book in their hands. I hear arguments all the time that we should not have ebooks because having them puts the poor at a disadvantage. Yes, the licensing issues cause concern for some people. I hear that our library is doing too much, too quickly, but our circulation statistics for traditional materials continue to fall by double digits each month, while electronic materials continue to soar. At the end of the day, the solution to all of these issues is not to buy more print materials with the hope that this will somehow meet the needs of modern society.
- I just wish that the ebook publishers weren't so reluctant to work with libraries. It's very disheartening.

- I love that the library is providing this service and glad that we have had such a warm reception from our customers....HOWEVER...(and I think this is particularly true of Kindle users) customers are used to an easy downloading experience, which they will not get from the library. The downloading process for many of the readers is clunky and has more steps than our target audience wants to go through—especially our senior citizens who offer up their new device to us and expect that we will just magically check out the book to it.
- I think libraries need a national consortium that can create our own channel, possibly our own easy to use platform. The monopolies are too powerful for libraries to deal with this issue independently.
- I wish that the public understood just how much DRM affects what we can have. Some think that the problems are technical (never mind that ebooks have been around for twenty-years or so in various forms), but DRM and reticent publishers are the real hangup from where I'm sitting.
- I wish publishers would get their act together re pricing. If we don't have enough copies of a particular book, or can't get it at all, no one will be interested in using the library to get ebooks.
- If we don't figure this out, we're sunk.
- It is an increasingly popular format for most libraries. I feel that the publishers are taking advantage of this by inflating the prices of the ebooks. The money they are making is almost pure profit (no paper or ink used, no shipping costs, etc.) and to jack up prices artificially to libraries, who have historically made information available to the masses, is immoral.
- It seemed like a good idea two years ago, but now with publishers, Amazon, Apple all against us, and patrons frustrated because they don't know how to use their devices (many are "1st time" tech users so do not know what they are doing) and the whole file type/epub/kindle/drm mess, it seems print books are a better long term investment. BUT, now that we have ebooks we can never go back, but are on the tech treadmill for this item too, just like databases, ILS, PC's etc.
- Libraries and library associations must put pressure on publishers to sell ebooks to libraries at a fair price. The public is demanding the ebook service from libraries and they don't understand why publishers are not selling to us.
- Many users are frustrated with how complicated the process is to download ePub books to a computer and then use Adobe Digital Editions to transfer them to an eReader. Kindle users are not nearly as frustrated as everyone else.
- Would like to be able to offer a download station for patrons in the library, but can't because of all the restrictions.

- More and more people are getting ereaders. WE are frustrated by not being able to obtain all the titles we would like to offer. As a long time librarian, who is a publisher to say we have to buy a new book after 26 uses? We have books on our shelves that have circulated 50-odd times and are in adequate condition. I can't understand why any author or publisher would not want a book to be available in e-book form. A sale is a sale. Ebooks are no different than paper books.
- Our books are offered through a statewide consortium, which is the only way a library our size can afford them. Most of the other programs out there—OverDrive etc.—would eat up 1/3 to 1/2 our county-wide book budget to simply provide basic content.
- Our greatest concern is being able to get popular materials quickly, at a fair price, that are compatible with popular devices. This is possible only to a very limited degree.
- Our Kindle patrons have had trouble downloading best sellers because of the lawsuits involving OverDrive and Amazon.
- Our library, and I think many others, want a solution that makes ebooks easily available in the same way physical books are easily available. A customer goes to the library for a physical book, picks it out and then checks it out—no special knowledge is needed for how to remove it from the shelf. Ebooks need to be the same—a customer picks it out from our catalog or online presence and checks it out. They shouldn't have to know 5 or 6 different platforms differing requirements in order to check out their choice.
- Our major vendor is OverDrive. It is ridiculously hard to use. I would like to look for something different, but it isn't up to me.
- Our patrons are very receptive to ebooks in the library. However, many don't know that we even offer them nor where to go to even start the process. That is our biggest challenge: getting the information out there. From a purchaser viewpoint, it's frustrating that not all in demand titles are available as an ebook (i.e., *Hunger Games*). Also, the prices are frustrating. Some are very well-priced but many seem extremely overpriced. It's also frustrating that the records for the books aren't correct. We have a huge problem with lack of subject headings on titles so they are hard to find without having a specific title as well as there being no designation between Young Adult and Children's titles. They are all grouped together so when searching for children's fiction you are presented also with all of the young adult fiction which is not age appropriate.
- People seem to either love them or hate them. Our population is heavy on seniors and conservatives. Some think libraries in general are a waste of money and ebooks even more so. But then we have plenty of patrons who

are interested in using ereaders. So... can't make everybody happy, but we do our best.

- Publishers not getting on-board with this movement are just shooting themselves in the foot. Sometimes we hear from patrons "Why can't I get this book? Why don't you own it?" and we just tell them the truth: "The publisher/copyright holder has chosen to not make it available to libraries. We absolutely would, if we could."
- Since we don't have devices here, I usually only hear from people who have recently purchased a device and need guidance getting started with the library ebook program we participate in.
- The ability to be able to provide any ebook from any vendor from the same platform would be a major benefit for libraries and patrons.
- The current ebooks-in-libraries situation is terrible, period. This is a classic situation of cutting off one's nose to spite one's face. If we could afford to do it, we would strike out on our own à la Douglas County, Colorado, because ownership of materials is VERY important to us. We can agree to circulation restrictions if ownership by our library is part of the deal.
- The demand is high and difficult to meet with our current budget (which isn't likely to increase). We started OverDrive with a grant in the current FY. Starting July we will have to take book budget money from physical books to keep ebooks going. Many of our patrons love ebooks but it will be a challenge to grow that service while maintaining other formats in the library.
- The ebook demand in our library is phenomenal. We need publishers to allow libraries to lend their ebooks. Libraries traditionally spur purchases of print books and materials. Limiting or denying the public access to ebooks is detrimental to the publishing business.
- The inability to purchase many popular titles is a critical concern for public libraries. We must get this resolved with publishers.
- The loss of access to most publishers' titles as well as the skyrocketing cost of those that are available is severely impacting our ability to provide resources to patrons. We are depending on the state and national library associations to take action, whether in lobbying to legislators or legal action, it cannot happen quickly enough.
- The market is growing and our ability to purchase is shrinking with excessive publisher demands and limitations for libraries. Knock it off, publishers!
- The only reason I selected OverDrive as my preferred ebook source is because the majority of our purchased ebooks come from them. The Content Reserve site is one of the worst sites I have ever used for book purchasing. It is so frustrating that many e-books are not available for

purchase through them. We buy ebooks for our circulating readers through Amazon, Sony, and Barnes and Noble; those providers always have the books we want. I wish Overdrive offered the same titles as the other providers at the same time.

- The publishers are killing us by not releasing bestsellers via e-book vendors.
- The transformation is happening more slowly than originally anticipated, I think, because limited availability creates a sort of catch-22 effect. People give up on it because of the wait, and the library can't afford to order what is not being used.
- They are becoming popular for customers who might not normally come into the library to check out books due to work or family commitments. Our library finds it necessary to provide help to older customers who may have received a reader/tablet as a holiday gift. We have found this to be especially true with Kindle products.
- They are very popular! However, it is hard to search online to order Overdrive books. I like to go by reviews, etc., and the Web site makes it difficult to search title by title. I also wonder how I could buy ebooks from other vendors like Ingram and Baker and Taylor and integrate it with our eBooks from Overdrive. Patrons want downloadable ebooks so reading from a computer screen won't work.
- This year, due to a \$5,000 grant, our library joined the Maine State Library InfoNet/Download Books Consortium and purchased 3 Kindles for our patrons to borrow. We plan to buy more ereaders and ebooks for our patrons.
- Tired of secondary purchases and illogical pricing. Our vendor has a horrible catalog where searching proves more than frustrating. Want more MP3 audiobook titles. Mostly tired of explaining to the patrons why we can't get the books they want.
- Use seems to be decreasing as waiting time for holds increases.
- We are on the verge of being priced out of the ability to purchase ebook licenses to lend to our public and are thinking about alternate options. I can't necessarily blame Overdrive as they are a for-profit business, but if they want their business model to succeed I would suggest fighting for access for libraries as an important goal. Whether it be from ALA or perhaps a major city branch, libraries seem some organizational structure from which to work with the publishers on better access, pricing, and lending models. Libraries are trying to preserve the legality of ebooks in today's market. Readers in general are in trouble if one major retailer is allowed to dictate the terms of use for everyone else.
- We are very interested in the models for patron-driven acquisition being looked at by Cloud 3M and startups like iVerse. I'd like to see more

coverage on that, as well as how libraries can work with companies like Tor that are stripping DRM from their downloadables.

- We continue to increase our digital budget to accommodate usage. Publishers continue to not work with libraries or not come up with a viable solution for libraries loaning ebooks. I was angry with HarperCollins but at least we can reasonably have access to their books and if we still need them after 26 checkouts we can afford to purchase another title. I would like to see all publishers come to the table to discuss how to make this better for readers and libraries.
- We have a four-year contract with OverDrive but are frustrated by their overall attitude toward customer service and by the increasing prices or outright unavailability of popular ebooks.
- We hope to be able to offer more titles for teens and kids in the future but Overdrive (our service) has had limited options for this so far
- We just wish we could provide the ebooks our public library readers want. The majority of the time we can't, because publishers won't sell them to us.
- We only launched our e-book "adventure" 30 days ago, so trends are not clear yet. We are, however, horrified at the prices and the lack of current released materials.
- We use Overdrive because the Colorado consortium uses Overdrive. Joining was the only option that would give us instant access to a lot of titles. In reality, it gives us instant access to the waiting list for a lot of titles. The very worst part of this whole ebook movement is that we never see our patrons who download from home, so we don't know what they like or don't like. This is another example of the "Bowling Alone" syndrome. We are growing farther and farther from any sense of community.
- We went with Freeding/Library Ideas, so we do not purchase individual titles, we offer access to their whole catalog and pay based on actual checkouts. The pluses: simultaneous checkouts, large catalog on opening day, fits within our low budget; the minuses: no current bestsellers, limited popular fiction, not compatible with plain Kindle which is the device that most people already own, at least locally.
- We would have more ebooks if the licensing allowed and we could keep them. But the subscription model is not good for any one but the middle man. Prices are out of sight and impossible for small libraries. Wait lists in consortium models can go on for months. People are starting to catch on and get angry at publishers and vendors. It's time that middle men vendors stop enabling bad business practices.
- Would like a model that permitted ownership rather than just a subscription. We are spending large amounts of money that could result in nothing to show for it at some point.

- Would like more titles available including more copies of best sellers.
- Would like to see current print books and ebooks released at the same time: access. Also spreading the information about <http://www.projectgutenberg.org>

3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

In this section, we look at specifics about why and how libraries select and purchase/license ebooks, as well as circulation trends.

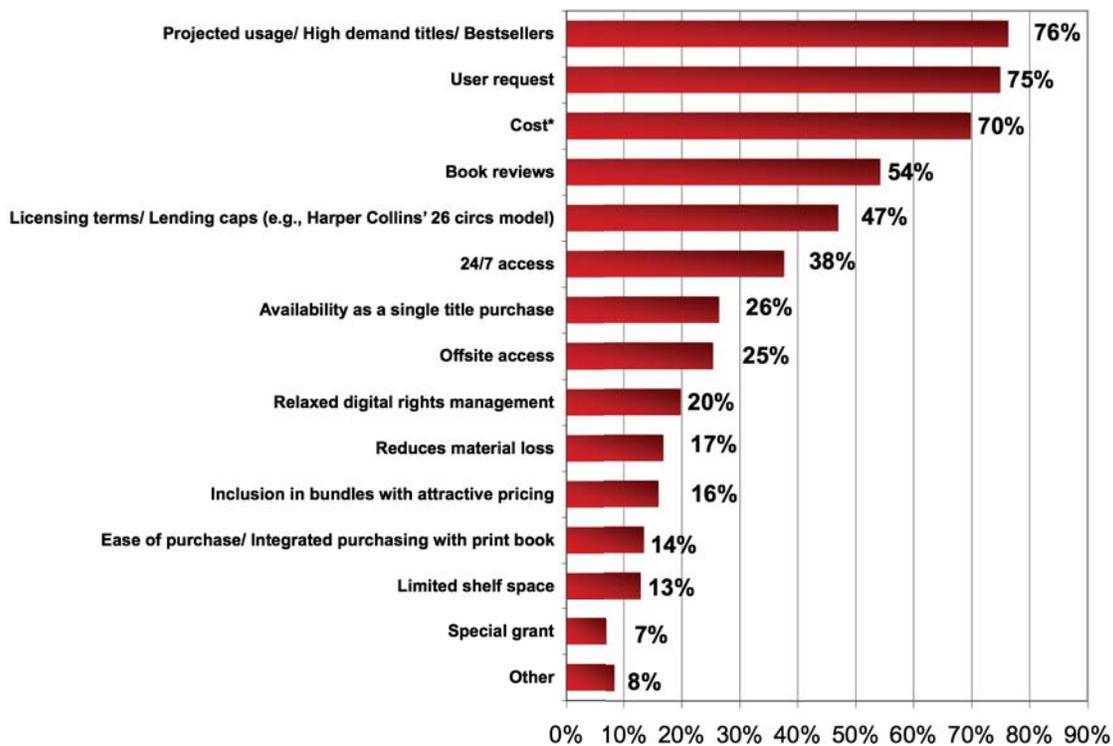
Acquisition

In each survey, we ask what factors influence a library's decision to acquire ebook titles (that is, acquire specific ebook titles, not ebooks in general). We retooled the selections in our 2012 survey; the 2012 data are presented in Figure 25, while 2011 data are presented in Figure 26.

The top factor is "projected usage/high demand titles/bestsellers," selected by 76% of respondents. Last year, "projected usage/high demand titles" was selected by 94% of respondents (which has been up from 77% in our 2010 survey). "User request" has ebbed slightly from 84% last year to 75% (still above 64% in 2010).

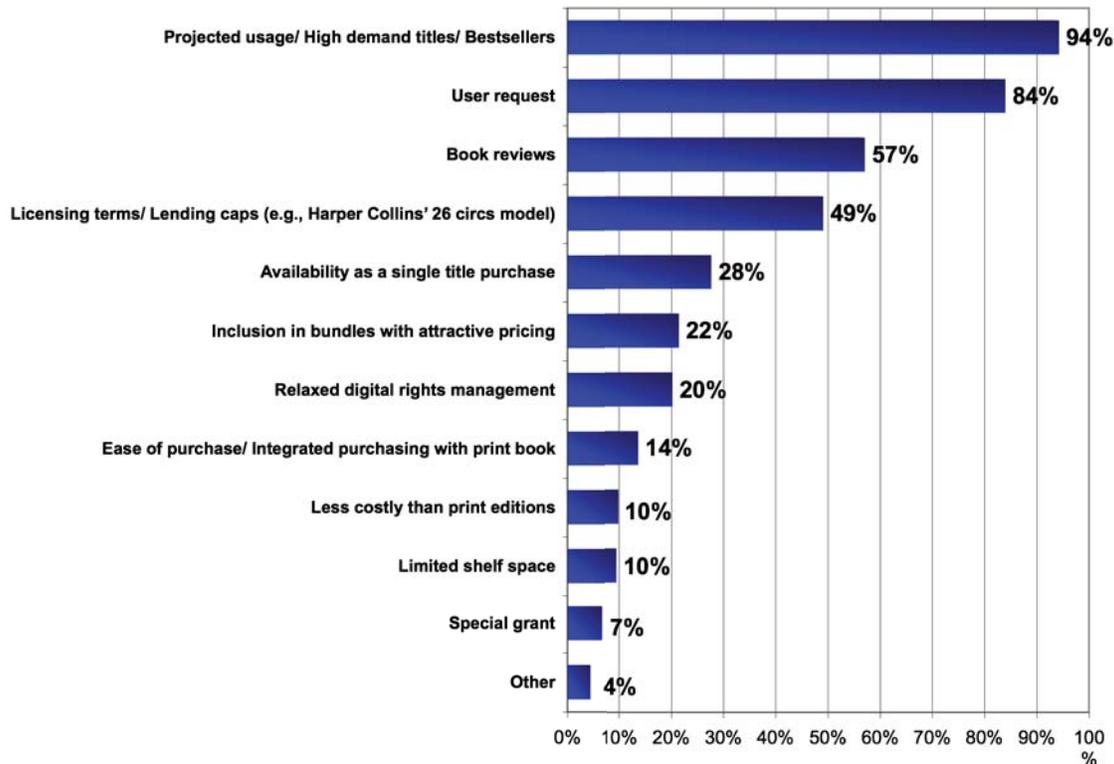
We added "cost" to this year's survey and it debuted at 70%—given the status of today's library budgets, we suspect this factor trumps nearly all others, hence some of the declines in the top two factors.

Figure 25. What factors influence your decision to purchase ebooks for your library? (multiple responses permitted)
% of public libraries (2012 Survey)



*Added to 2012 survey.

**Figure 26. What factors influence your decision to purchase ebooks for your library?
(multiple responses permitted)
% of public libraries (2011 survey)**



“Cost” naturally is a bigger issue for smaller libraries, as well as for those with smaller materials budgets. The influence of “user request” increases with library size as does “available as a single title purchase.”

**Table 21. What factors influence your decision to purchase ebooks for your library?
(multiple responses permitted)****% of public libraries by population served and materials budget**

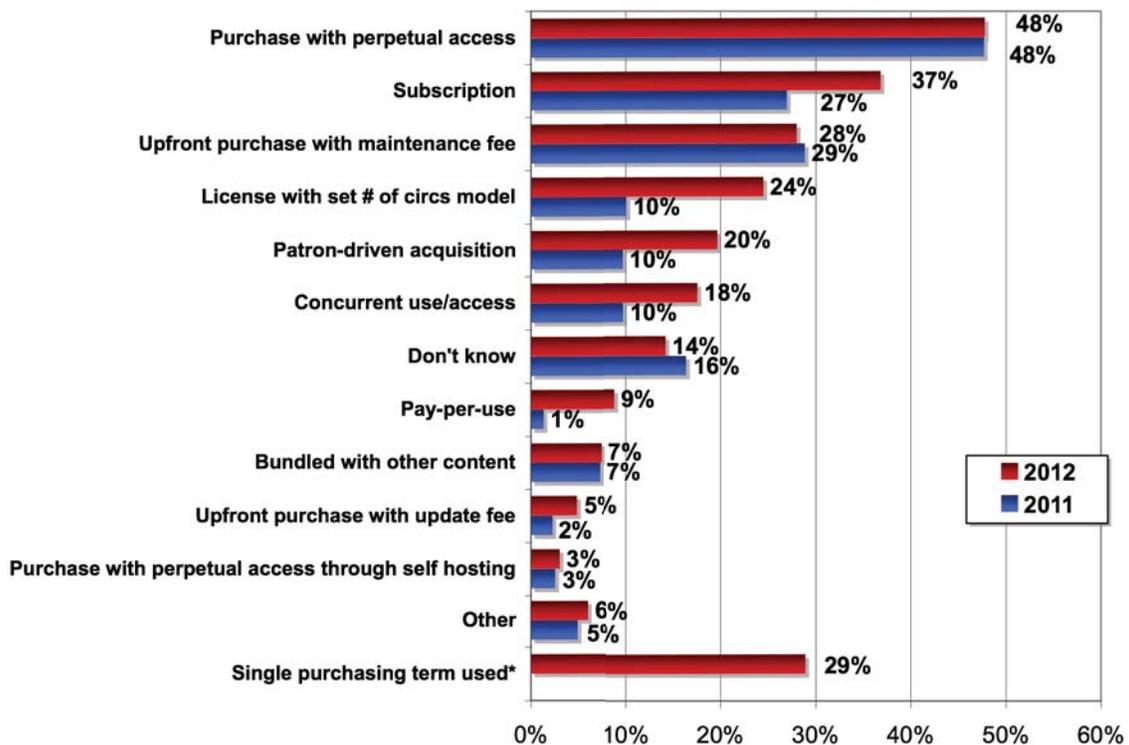
	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
Projected usage/High demand titles/Bestsellers	58%	85%	84%	76%	60%	74%	81%	82%
User request	66%	72%	84%	84%	66%	79%	70%	78%
Cost	71%	70%	69%	64%	76%	68%	72%	61%
Book reviews	53%	53%	55%	64%	56%	54%	52%	59%
Licensing terms/Lending caps (e.g., Harper Collins' 26 circs model)	36%	43%	60%	52%	48%	36%	51%	49%
24/7 access	27%	35%	45%	52%	31%	28%	36%	53%
Availability as a single title purchase	18%	33%	22%	40%	24%	27%	22%	31%
Offsite access	19%	23%	33%	32%	21%	22%	23%	35%
Relaxed digital rights management	10%	16%	29%	32%	8%	14%	25%	29%
Reduces material loss	13%	14%	26%	28%	15%	16%	13%	27%
Inclusion in bundles with attractive pricing	12%	16%	22%	16%	8%	12%	19%	27%
Ease of purchase Integrated purchasing with print book	8%	15%	17%	12%	6%	11%	14%	20%
Limited shelf space	14%	14%	12%	8%	18%	15%	7%	12%
Special grant	7%	7%	9%	4%	13%	5%	4%	6%
Other	11%	5%	12%	4%	11%	8%	4%	10%
2011								
Projected usage/High demand titles/Bestsellers	96%	94%	92%	100%	93%	92%	96%	98%
User request	75%	83%	87%	91%	81%	74%	86%	92%
Book reviews	52%	60%	54%	74%	48%	62%	48%	70%
Licensing terms/Lending caps (e.g., Harper Collins' 26 circs model)	52%	47%	50%	47%	51%	52%	48%	43%
Availability as a single title purchase	25%	22%	35%	32%	28%	20%	25%	38%
Inclusion in bundles with attractive pricing	17%	18%	24%	26%	22%	15%	19%	26%
Relaxed digital rights management	17%	18%	22%	32%	16%	20%	17%	27%
Ease of purchase Integrated purchasing with print book	12%	11%	16%	18%	14%	13%	12%	14%
Less costly than print editions	10%	6%	13%	15%	16%	7%	8%	10%
Limited shelf space	9%	9%	10%	18%	12%	9%	10%	12%
Special grant	7%	7%	7%	6%	16%	6%	6%	3%
Other	2%	6%	5%	3%	4%	4%	4%	4%

Ebook Purchasing Terms

There have been some changes in the purchasing terms used by libraries from last year's survey to this year. Although "purchase with perpetual access" remains the top purchasing model (unchanged at 48% of respondents, though down from the high of 57% in our 2010 survey), "subscription" has rebounded from 27% last year to 37% this year (it had been at 49% in 2010). "License with a set number of circs" climbs from 10% last year (when we had first included it on our survey) to 24%. "Patron-driven acquisition," which allows libraries to pay for titles only when they are checked out, climbs from 10% to 20%.

Most libraries acquire ebooks using a variety of purchasing terms; only 29% utilize a single purchase model.

Figure 27. What type of purchasing terms does your library typically use when acquiring ebooks? (multiple responses permitted)
% of public libraries



*Not asked; calculated from raw data.

Smaller libraries with fewer resources are the most likely to use a single purchasing term model when acquiring ebooks—nearly half (48%) use only a single purchasing term, the most common being “purchase with perpetual access.” Among the libraries serving the largest populations, “patron-driven acquisition” jumped from 6% to 25%.

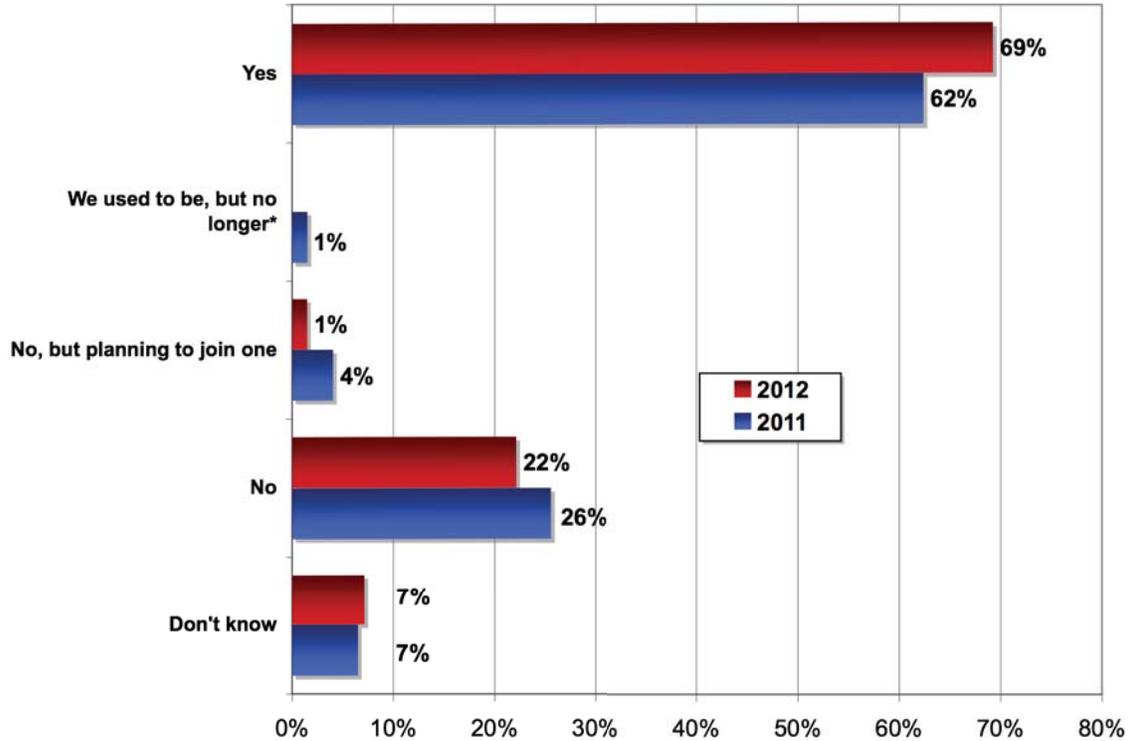
Table 22. Q36: What type of purchasing terms does your library typically use when acquiring ebooks? —Public libraries by population served and materials budget (*multiple responses permitted*)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Purchase with perpetual access	45%	47%	52%	54%	42%	45%	51%	58%
Subscription	20%	31%	53%	63%	23%	23%	43%	58%
Upfront purchase with maintenance fee	16%	24%	36%	54%	21%	18%	32%	42%
License with set # of circs model	16%	17%	36%	50%	10%	19%	30%	42%
Patron-driven acquisition	17%	20%	19%	25%	19%	17%	19%	23%
Concurrent use/access	10%	14%	24%	38%	10%	15%	16%	29%
Pay-per-use	7%	8%	7%	17%	5%	3%	13%	15%
Bundled with other content	5%	6%	10%	13%	3%	5%	6%	17%
Upfront purchase with update fee	5%	5%	3%	13%	5%	4%	4%	8%
Purchase with perpetual access through self hosting	3%	2%	3%	4%	3%	1%	4%	4%
Other	11%	3%	5%	0%	10%	6%	3%	4%
Don't know	13%	19%	10%	13%	18%	19%	7%	8%
Single purchasing term used	48%	30%	19%	4%	45%	38%	28%	10%
2011								
Purchase with perpetual access	49%	43%	48%	71%	49%	46%	43%	58%
Upfront purchase with maintenance fee	15%	23%	40%	44%	12%	26%	30%	37%
Subscription	22%	25%	31%	35%	18%	25%	30%	32%
License with set # of circs model	1%	8%	9%	53%	3%	2%	9%	28%
Concurrent use/access	3%	8%	11%	24%	3%	8%	9%	14%
User-driven acquisition	9%	12%	8%	6%	10%	7%	15%	6%
Bundled with other content	3%	8%	8%	12%	7%	7%	4%	9%
Purchase with perpetual access through self hosting	5%	3%	2%	0%	6%	3%	3%	0%
Upfront purchase with update fee	2%	3%	2%	0%	3%	2%	2%	2%
Pay-per-use	0%	4%	0%	0%	1%	2%	3%	0%
Other	7%	5%	4%	0%	7%	6%	4%	1%
Don't know	23%	19%	13%	6%	22%	18%	14%	16%

Consortia

Participation in consortium license programs continues to appeal to public libraries. About seven in ten public libraries (69%) report that they are members of a consortium, up from 54% in our 2010 survey. That may have maxed out; last year 4% of libraries (and, in 2010, 6% of libraries) said they were planning to join one, down to 1% this year.

**Figure 28. Is your library part of a consortium license program for its ebook collection?
% of public libraries**



* Removed from 2012 survey

Consortium membership has grown in the last year, especially among smaller libraries (membership up from 83% to 88% in the last year), with 4% planning to join one.

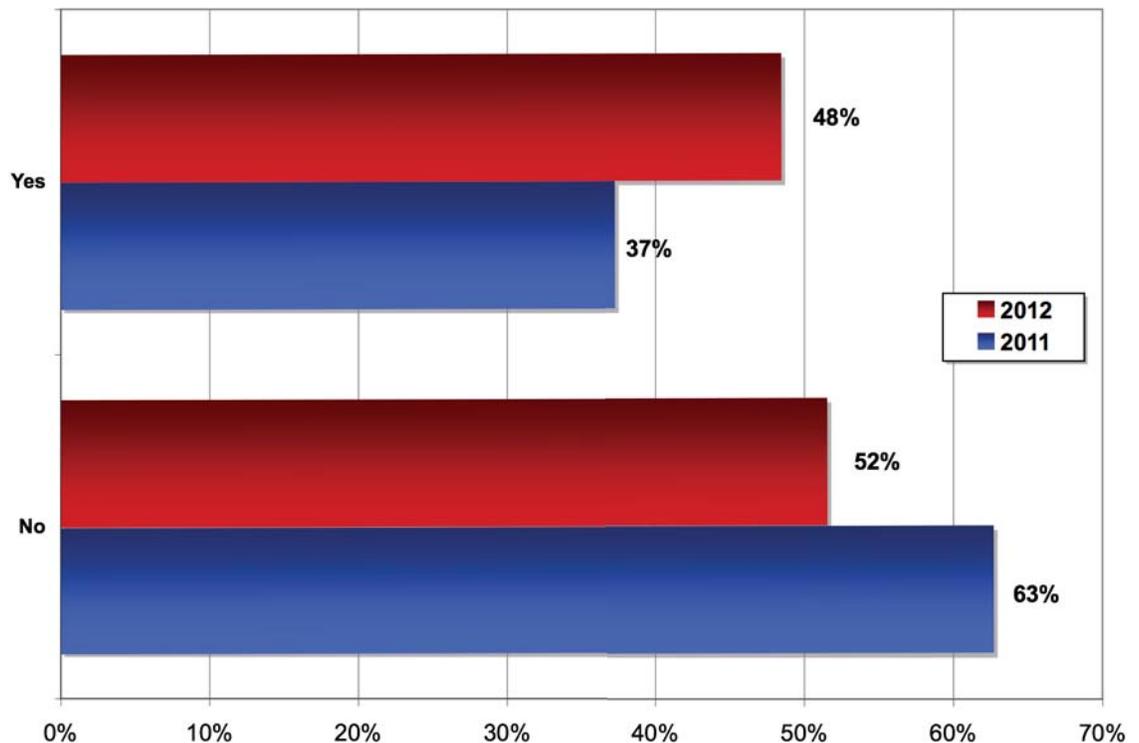
**Table 23. Is your library part of a consortium license program for its ebook collection?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Yes	88%	76%	51%	25%	83%	82%	71%	40%
No, but planning to join one	1%	1%	2%	4%	2%	1%	1%	4%
No	8%	14%	41%	53%	11%	12%	22%	48%
Don't know	3%	9%	6%	18%	5%	5%	7%	8%
2011								
Yes	83%	77%	43%	23%	80%	79%	65%	36%
We used to be, but no longer	1%	1%	2%	2%	1%	2%	1%	2%
No, but will in the future	4%	3%	5%	2%	7%	4%	3%	1%
No	7%	14%	42%	60%	8%	11%	24%	53%
Don't know	4%	5%	8%	13%	3%	4%	7%	8%

Buy Books Independently

We asked a follow up question to see if libraries that are consortium members also buy ebooks independently. This year, 48% of libraries that are part of a consortium licensing program also purchase ebooks on their own (up from 37% last year).

**Figure 29. Does your library also buy ebooks independently?
% of public libraries that are part of a consortium licensing program**



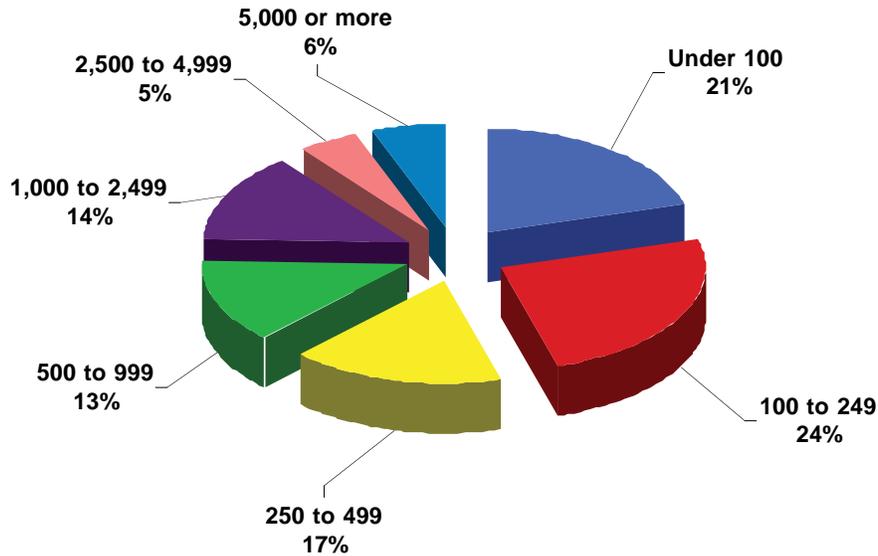
Larger libraries—those that have the resources to do so—are the most likely to also buy books independently.

**Table 24. If yes, does your library also buy ebooks independently?
% of public libraries that are part of a consortium licensing program, by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Yes	29%	55%	64%	57%	25%	40%	64%	67%
No	71%	45%	36%	43%	75%	60%	36%	33%
2011								
Yes	23%	37%	48%	50%	22%	25%	43%	65%
No	77%	63%	52%	50%	78%	75%	57%	35%

In 2012, we added a second follow up question that asked how many ebooks consortium members estimated they had bought independently. Consortium members bought on average almost 1,400 ebooks independently.⁶

**Figure 30. If part of a consortium, approximately how many ebooks has your library bought or licensed independently?
% of public libraries that are part of a consortium**



Given the relatively small base, the data in the following table is directional at best, but not unexpectedly, the number of ebooks bought independently rises substantially with population served and materials budget.

⁶ Mean ebooks bought independently: 1,387.3. Median ebooks bought independently: 318.2 ebooks.

Table 25. If part of a consortium, approximately how many ebooks has your library bought or licensed independently?

% of public libraries that are part of a consortium by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Under 100	44%	19%	7%	0%	53%	27%	13%	6%
100 to 249	31%	31%	16%	0%	15%	44%	21%	19%
250 to 499	13%	15%	24%	0%	15%	15%	21%	13%
500 to 999	5%	20%	9%	0%	6%	10%	15%	16%
1,000 to 2,499	3%	10%	24%	33%	6%	5%	18%	16%
2,500 to 4,999	3%	1%	9%	50%	3%	0%	10%	6%
5,000 or more	2%	4%	11%	17%	3%	0%	3%	23%
Mean	643	747	2,560	6,625	953	302	1,124	4,102
Median	130	250	687	3,333	94	177	449	849

Ebook Usage Statistics

Another new question we added to our 2012 survey asked if consortium member libraries were able to track circulation or usage statistics through their state or consortia. Sixty percent of public libraries were, 10% were not, and 11% could but “not always.” Another 19% answered not applicable, probably because they were not a member of a consortium. As with so many other aspects of ebooks, the accessibility of usage stats depends on the vendor.

Figure 31. Is your library able to track circulation/usage statistics for ebooks available through the state or consortium?

% of public libraries

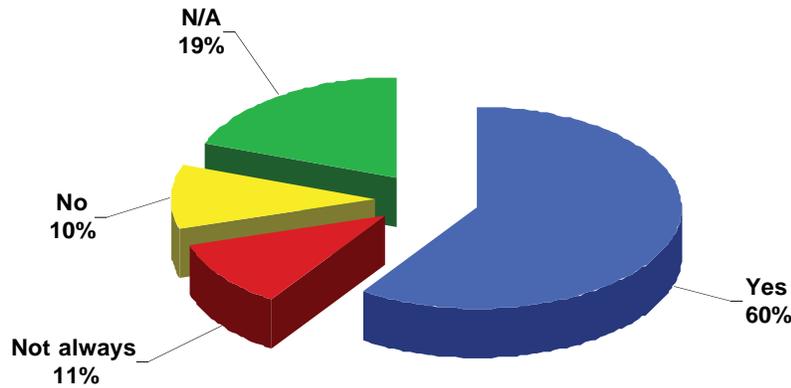


Table 26. Is your library able to track circulation/usage statistics for ebooks available through the state or consortium?

% of public libraries by population served and materials budget

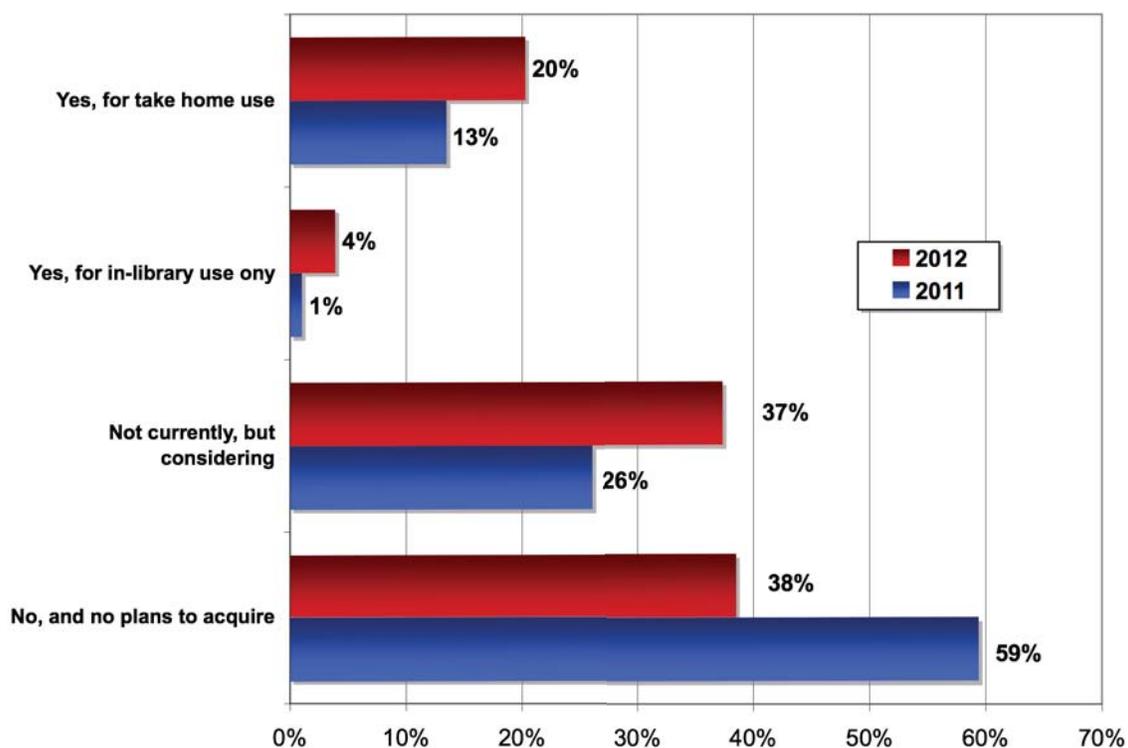
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	71%	64%	43%	43%	64%	72%	58%	36%
Not always	11%	11%	9%	9%	11%	9%	15%	6%
No	10%	10%	13%	9%	16%	5%	9%	15%
N/A	8%	15%	36%	40%	9%	13%	17%	43%

Hardware Circulation

A perennial question in the surveys is, “Do libraries circulate actual e-reading devices?” And the answer is, not generally—but it is on the rise. Please note that we rephrased the question from “Does your library circulate preloaded ereading devices?” to “Does your library have ereading devices available for patrons to borrow?” in our 2012 survey. We removed “preloaded” from the question in order to ask some follow-up questions (see Figure 36).

While only 20% of public libraries circulate ereading hardware for take-home use, it is up from 13% last year. A further 4% (up from 1%) circulate ereaders but only for in-library use. More than one-third of libraries (37%, up from 26%) are considering circulating ereaders. Thirty-eight percent—way down from 59% last year—have no plans to acquire ereaders for circulation.

Figure 32. Does your library have ereading devices available for patrons to borrow?
% of public libraries



Surprisingly, there is an inverse relation between library size and/or budget and a tendency to circulate ereaders. Turns out the smallest libraries are the most likely to circulate ereading hardware, up substantially from last year (from 18% to 33%).

**Table 27. Does your library have ereading devices available for patrons to borrow?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
NET YES	33%	22%	18%	25%	23%	30%	23%	23%
Yes, for in-library use only	5%	3%	3%	3%	2%	5%	3%	4%
Yes, for take home use	28%	18%	15%	22%	22%	25%	19%	19%
Not currently, but considering	31%	38%	43%	33%	40%	34%	39%	31%
No, and no plans to acquire	36%	40%	40%	42%	37%	36%	38%	46%
2011								
NET YES	18%	16%	11%	11%	14%	17%	12%	14%
Yes, for in-library use only	2%	2%	0%	0%	1%	2%	1%	0%
Yes, for take home use	16%	14%	11%	11%	13%	15%	11%	14%
Not currently, but considering	30%	28%	24%	21%	30%	27%	29%	21%
No	53%	57%	66%	68%	56%	56%	59%	65%

Number of Ereaders Available

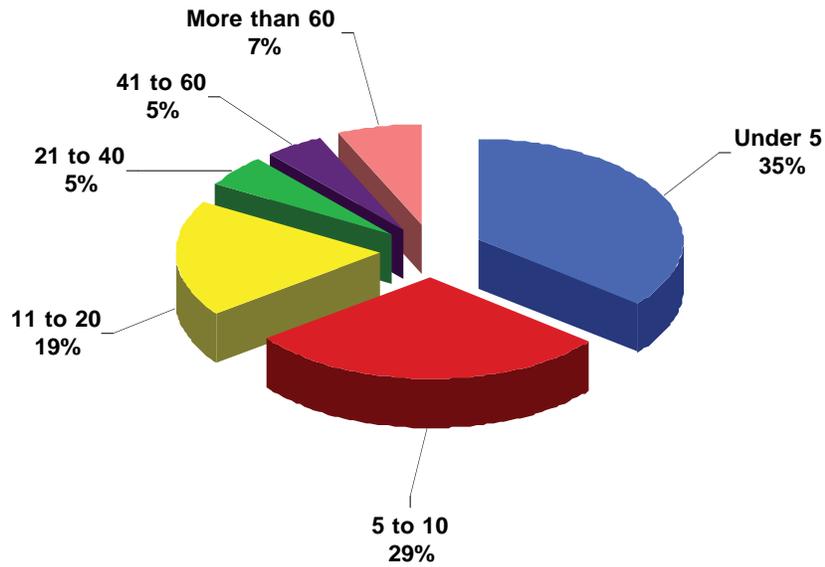
We asked a follow-up question to identify the number of hardware ereading devices public libraries have on hand. (For the sake of clarity, we present the 2011 and 2012 data in two separate charts on the following page.)

In 2012, of the 24% of public libraries that responded “yes” to the previous question, more than one-third (35%) maintain fewer than five ereading devices, while another 29% maintain five to ten devices. The average number of devices maintained is about 16.4.⁷ This is relatively the same as the average number of devices circulated last year (15.6).⁸

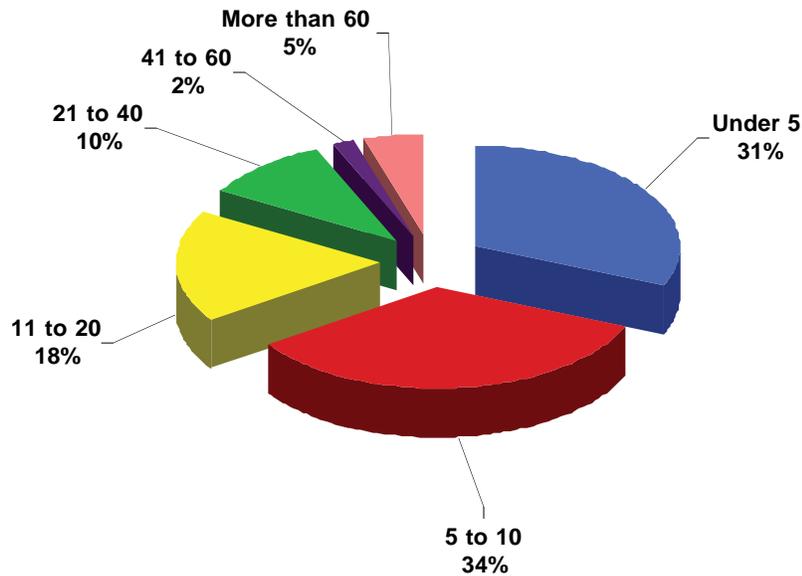
⁷ Mean hardware ereaders circulated (2012): 16.4. Median hardware ereaders circulated (2012): 6.0.

⁸ Mean hardware ereaders circulated (2011): 15.6. Median hardware ereaders circulated (2011): 6.0.

**Figure 33. If yes, how many ereading devices does your library have available to borrow?
% of public libraries that circulate ereading devices**



**Figure 34. If yes, how many preloaded ereading devices does your library maintain?
% of public libraries that circulate ereading devices (2011 survey)**



As the base for this question was fairly small, cross-tabulation by population served and materials budget are less than robust.

Specific Ereaders Circulated

The ereader market has changed rapidly, with new devices appearing since our last survey (Amazon Kindle Fire, Nook Tablet). OverDrive's launch of library lending to Amazon's Kindle also occurred since our last fielding. Both of these have resulted in fluctuations in the brands of ereaders that libraries circulate.

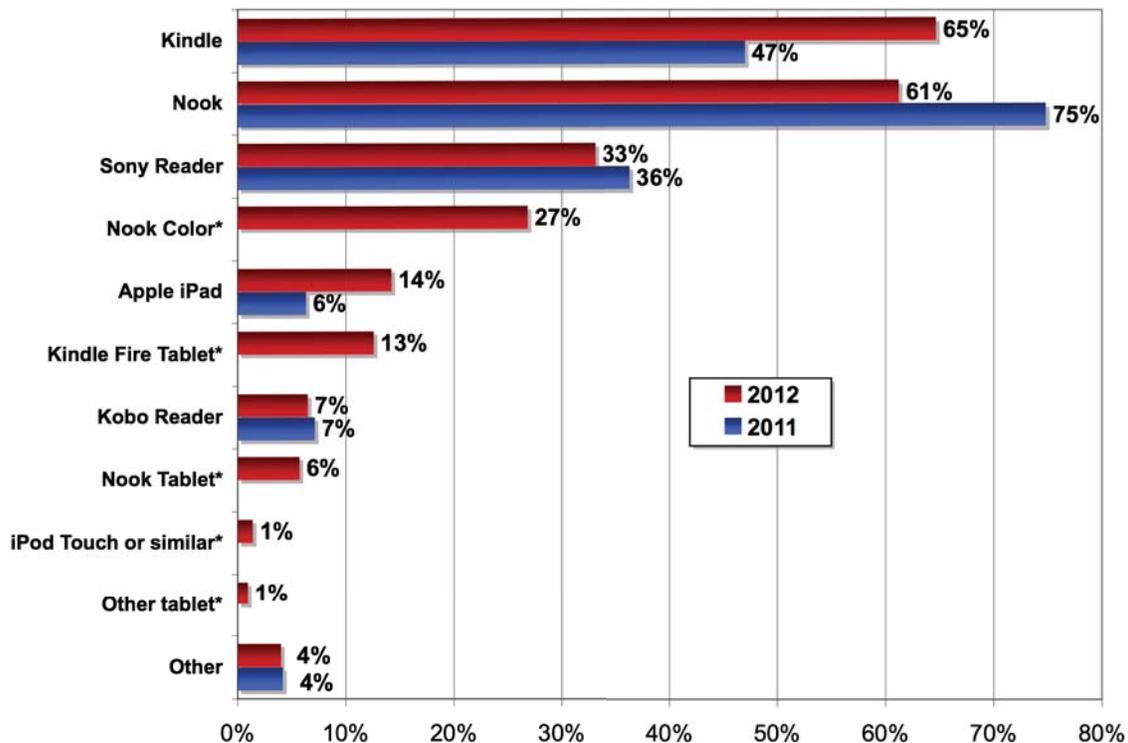
The Kindle is now the most popular ereader circulated by public libraries. Of the 24% of libraries that circulate ereading hardware devices, most (65%, up from 47%) circulate the Amazon Kindle. The Kindle Fire tablet, new to this year's survey, debuted at 13%.

The original Nook, which was the number one answer last year (circulated by 75% of public libraries), is now down to 61%. The NookColor, which we added to the 2012 survey, came in at 27% of public libraries that circulate ereaders. The new Nook Tablet, also added to the 2012 survey, was circulated by 6% of libraries.

The Sony Reader is slowly losing ground; it is now down to 33% (it had been at 41% in 2010). The iPad is gaining a little bit of ground; it is circulated by 14% of libraries that circulate ereaders. The iPad one of the higher-cost devices in this category and is out of reach of a lot of libraries and, for most libraries, offers far more features than necessary for reading ebooks.

Figure 35. If yes, which e-reading device(s) does your library currently have available? (multiple responses permitted)

% of public libraries that circulate ereading devices



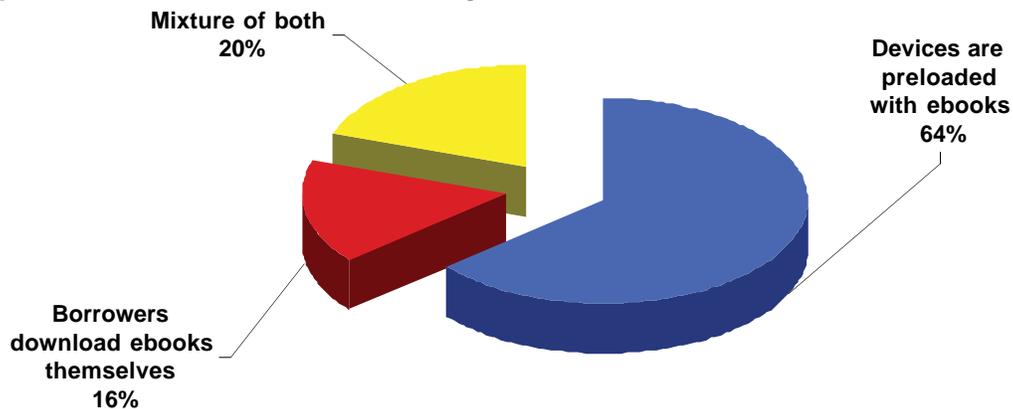
*Added in 2012 survey.

Preloaded Ereaders

A new question on our 2012 survey asked whether libraries preload ebooks on their ereading devices, or if borrowers are allowed to download ebooks to the devices themselves. The majority (64%) preload ebooks on the devices, which save the borrowers the hassle of trying to figure out how to do it themselves. Only 16% of libraries let borrowers download ebooks to library-owned devices themselves. One-fifth (20%) of libraries that circulate ereaders report that they offer users a mix of both.

Figure 36. If yes, are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?

% of public libraries that circulate ereading devices



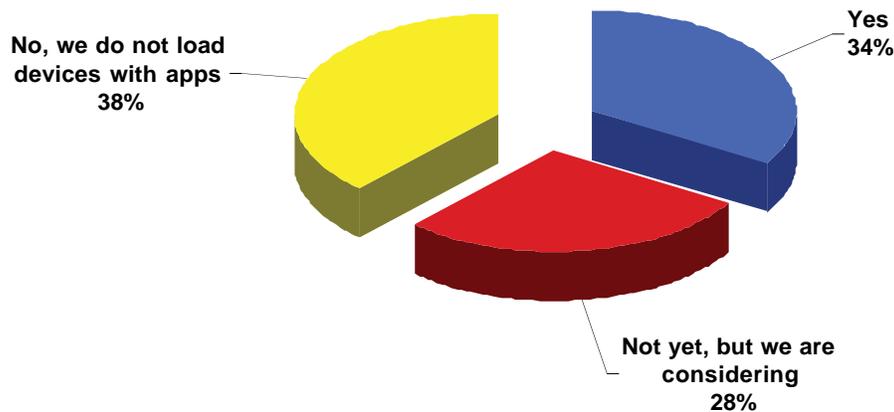
Load Educational Apps

For libraries with tablets, do they exclusively load ebooks, or do they also load educational apps or enhanced ebooks on their tablets? Just over a third (38%) do not load tablets with apps, but almost as many (34%) do, while 28% don't currently but are considering it.⁹

⁹ Bestselling author Christopher Moore—who writes decidedly adult “horror comedy”—released a complementary iPhone app for his 2012 book *Sacré Bleu*. The book was about 19th-century French Impressionist painters, and the app provided additional factual background material on the artists who served as characters in the book, the works cited in the text, and the author’s wanderings around Paris as he researched the book. For fans of Christopher Moore, it was a welcome “value-added” component that enhanced the experience of the novel.

Figure 37. If yes, do you load educational apps or enhanced ebooks on your library's tablets?

% of public libraries that circulate ereading tablets



The base for this question was decidedly small, therefore cross-tabulation by population served and materials budget are not represented.

Ebook Circulation Trends

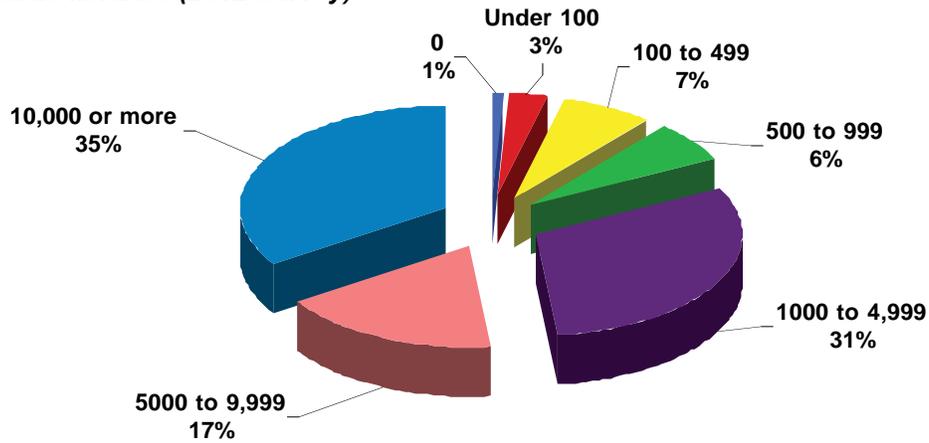
How many ebooks did public libraries circulate last year? And how many did they circulate the year before? Do they see ebook circulation continuing to rise or starting to level off?

Ebook Circulation—FY2011

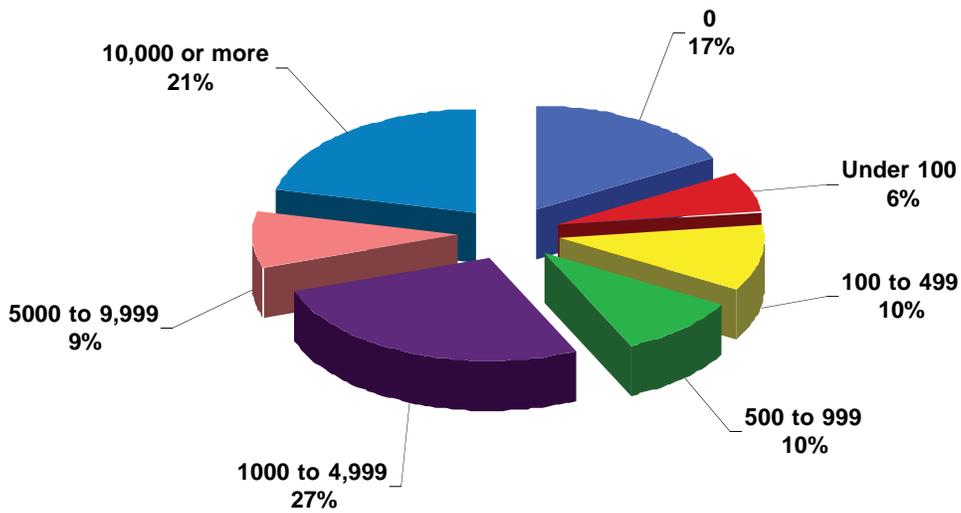
Ebook circulation continues to grow by leaps and bounds. This year's respondents reported that ebook circulation and usage for fiscal year 2011 (see Figure 38), was 44,596 (including zero circ responses). Compare this to the mean ebook circulation for FY 2010 (see Figure 39), where public libraries reported a mean ebook circulation of 11,281 (including zero circ respondents) and FY 2009 where mean ebook circulation was 5,138 (including zero responses).

A large number of zero circulation figures in 2009 and 2010 prompted us to tweak the question a little. This year we asked about ebook usage in addition to circulation, thinking that there might be libraries that don't traditionally circulate their ebooks like print books. This subject also encouraged us to add the question about what percent of ebook collections are physically downloaded versus viewed online (89% downloaded/11% viewed online; see Figure 15).

**Figure 38. Approximately, what was your total ebook circulation/usage in 2011?
% of public libraries (2012 Survey)**



**Figure 39. What was your ebook circulation in FY 2010?
% of public libraries (2011 survey)**



Larger libraries with over 100,000 population served saw the biggest gains in ebook circulation/usage.

**Table 28. What was your ebook circulation in FY 2010 and 2011?
% of public libraries with ebooks by population served and materials budget**

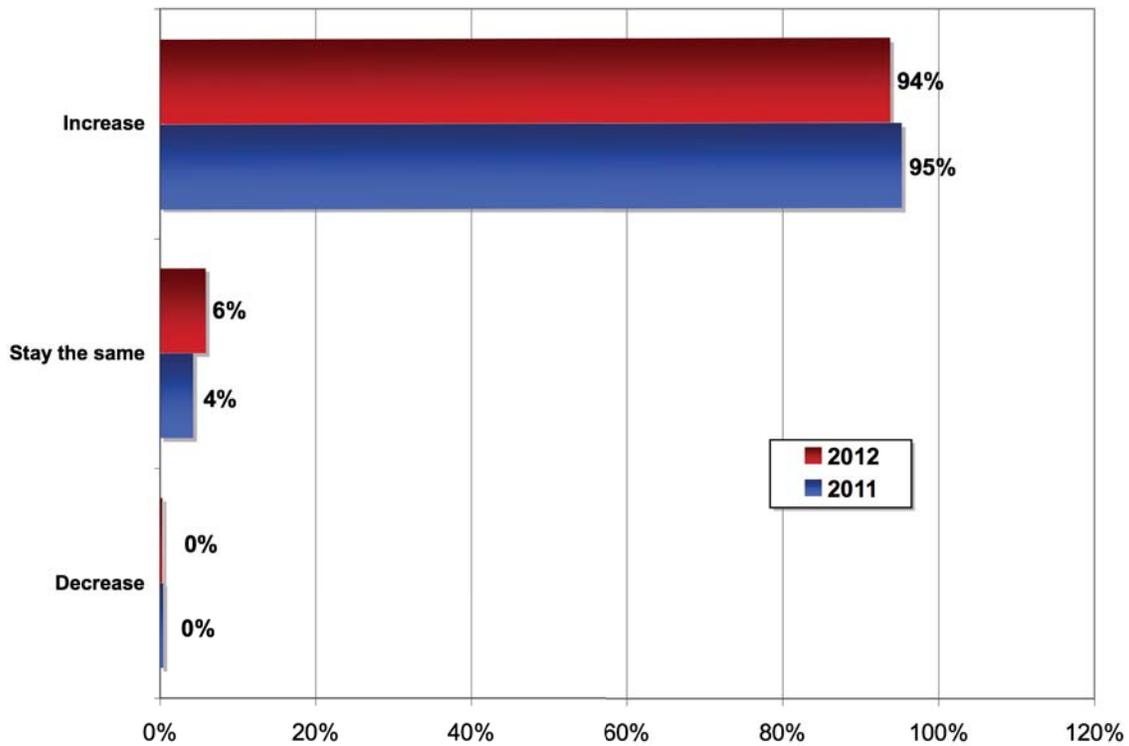
	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
FY 2011								
0	1%	0%	2%	0%	0%	1%	1%	0%
Under 100	9%	1%	0%	0%	9%	3%	3%	0%
100 to 499	24%	1%	0%	0%	34%	7%	0%	0%
500 to 999	19%	2%	0%	0%	19%	11%	0%	2%
1000 to 4,999	36%	45%	20%	6%	28%	48%	36%	6%
5000 to 9,999	7%	24%	18%	6%	7%	17%	22%	10%
10,000 or more	5%	27%	60%	88%	3%	13%	38%	81%
Mean ebook circulation (including 0)	3,489	8,460	101,593	132,037	2,284	36,217	12,547	116,792
Mean ebook circulation (not including 0)	3,523	8,460	103,180	132,037	2,284	36,624	12,721	116,792
FY 2010								
0	25%	16%	18%	3%	27%	21%	18%	5%
Under 100	22%	6%	0%	0%	30%	8%	2%	0%
100 to 499	23%	14%	1%	0%	17%	27%	4%	0%
500 to 999	13%	15%	5%	0%	9%	19%	11%	1%
1000 to 4,999	13%	34%	32%	8%	12%	19%	39%	23%
5000 to 9,999	2%	6%	15%	13%	4%	3%	9%	16%
10,000 or more	2%	9%	29%	77%	1%	4%	16%	55%
Mean FY 2009 ebook circ (including 0)	1,055	5,038	11,080	57,028	894	1,540	7,037	35,819
Median FY 2009 ebook circ (not including 0)	1,399	5,998	13,454	58,528	1,228	1,938	8,621	37,633

Future Ebook Circulation

The overwhelming majority of survey respondents (94%, essentially unchanged from last year) expect ebook circulation to increase this year compared to last year, while only 6% (up two percentage points) expect it to remain the same. Less than 1% expects a decrease in ebook circulation.

That said, while nearly all public libraries are anticipating an increase, the magnitude of that increase seems to be slowing, with the net average change in ebook circulation for FY 2012 is +67%, down from +108% that was expected last year at this time.

**Figure 40. Compared to last year, do you expect this year’s circulation of ebook titles to increase, stay the same, or decrease?
% of public libraries**



We also asked our respondents to estimate how much of an increase or decrease they expected:

	2011	2012
Average % increase	113%	72%
Average % decrease	38%	100%
Overall % change expected	+108%	+67%

Larger libraries expect greater increases in ebook circulation than smaller libraries. But virtually across the board, circulation increases are slowing down compared to last year. Ebooks may very well hit the saturation point within a couple of years.

Table 29. Compared to last year, do you expect this year's circulation of ebook titles to increase, stay the same, or decrease?**% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
2012								
Increase	89%	95%	97%	100%	89%	94%	98%	94%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%
Under 10%	7%	6%	2%	0%	10%	3%	2%	4%
10% to 24%	23%	31%	21%	13%	22%	23%	31%	20%
25% to 49%	20%	19%	29%	17%	19%	24%	25%	13%
50% to 74%	23%	15%	15%	23%	18%	21%	17%	20%
75% to 99%	5%	5%	2%	7%	5%	3%	7%	4%
100% or more	23%	24%	31%	40%	27%	26%	18%	39%
Average % increase	62	58	84	123	57	69	77	81
Stay the same	10%	5%	3%	0%	10%	6%	2%	6%
Decrease	1%	0%	0%	0%	1%	1%	0%	0%
Average % decrease	100	0	0	0	100	0	0	0
Overall % change Expected	+54	+55	+82	+123	+50	+65	+75	+76
2011								
Increase	89%	96%	97%	98%	85%	95%	96%	98%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%
Under 10%	2%	2%	3%	0%	4%	1%	2%	4%
10% to 24%	21%	17%	14%	11%	23%	14%	18%	15%
25% to 49%	18%	20%	19%	16%	21%	15%	24%	15%
50% to 74%	16%	18%	13%	20%	18%	14%	17%	19%
75% to 99%	3%	3%	5%	9%	2%	3%	3%	8%
100% or more	40%	38%	46%	43%	32%	51%	37%	40%
Average % increase	109	114	114	132	95	138	99	119
Stay the same	10%	4%	3%	0%	13%	4%	2%	2%
Decrease	1%	0%	0%	2%	1%	0%	1%	0%
Average % decrease	40	0	0	0	55	25	0	0
Overall % change expected	+96	+110	+111	+130	+80	+131	+95	+117

Barriers to Ebook Consumption

The biggest barrier to ebook consumption, say public library respondents, is “long wait times for ebooks,” selected by 72% of public libraries, up 20 percentage points from last survey. “Limited titles available,” a new choice, came in at 71%. Likewise, “in-demand titles not available for libraries” is at 60%, up from 41% last year. We see a theme emerging...

“Complex downloading process” ebbs to 55% from 60% last year (it was at 45% in 2010). “Digital rights management issues,” the perennial bugaboo for all ebook readers, be they libraries or not, climbs to 49% from 46% (and an all-time high for this item; it was at 37% in 2010). “Users prefer print” drops to 22%, an all-time low for this item.

Figure 41. What hinders the public from reading your library’s ebook content? (multiple responses permitted)
% of public libraries

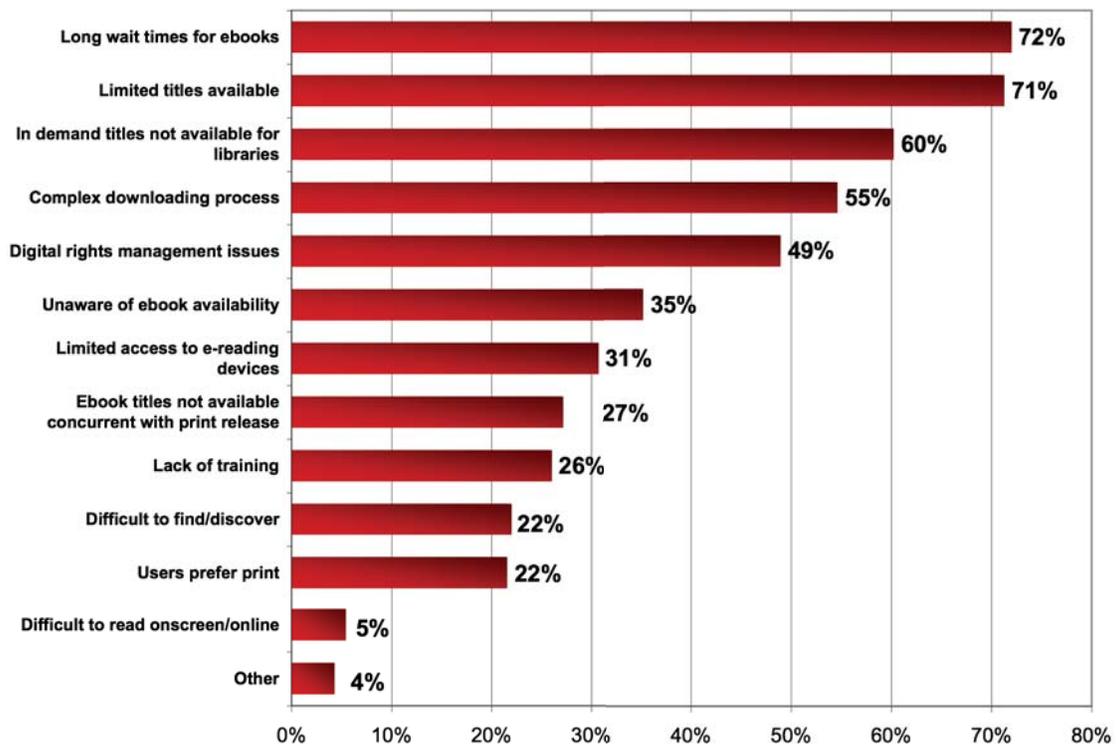


Figure 42. What hinders the public from reading your library’s ebook content? (multiple responses permitted)
% of public libraries (2011 survey)

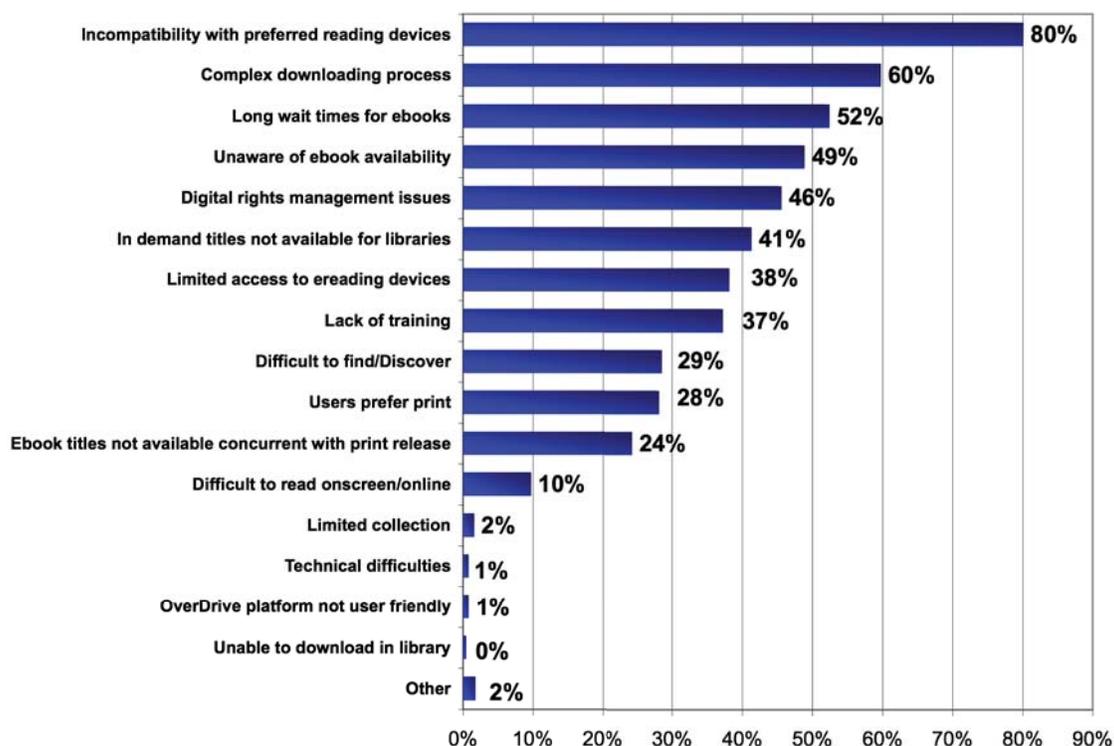


Table 30. What hinders the public from reading your library’s ebook content? (multiple responses permitted)
% of public libraries by population served and materials budget

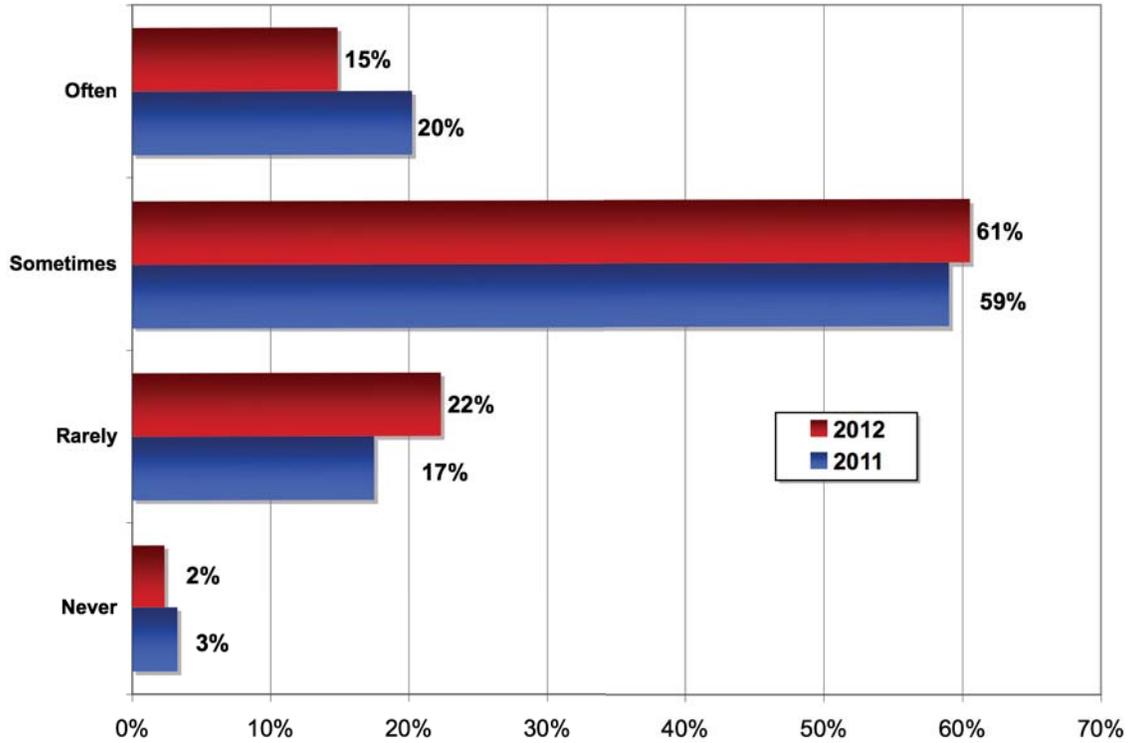
	<i>Population Served</i>				<i>Materials Budget</i>			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Long wait times for ebooks	77%	69%	71%	69%	78%	71%	72%	66%
Limited titles available	66%	73%	77%	63%	63%	73%	71%	77%
In demand titles not available for libraries	53%	63%	62%	74%	52%	60%	63%	67%
Complex downloading process	43%	57%	66%	54%	42%	53%	60%	64%
Digital rights management issues	39%	57%	50%	57%	33%	52%	50%	60%
Unaware of ebook availability	29%	35%	38%	54%	31%	31%	31%	53%
Limited access to e-reading devices	34%	26%	35%	26%	37%	26%	28%	33%
Ebook titles not available concurrent with print release	21%	30%	29%	34%	20%	27%	32%	27%
Lack of training	23%	28%	24%	37%	22%	27%	26%	30%
Difficult to find/discover	18%	22%	21%	40%	15%	18%	26%	36%
Users prefer print	27%	21%	18%	11%	32%	24%	18%	10%

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Difficult to read onscreen/online	6%	5%	4%	9%	6%	5%	4%	7%
Other	7%	1%	6%	3%	6%	3%	8%	1%
2011								
Incompatibility with preferred reading devices	71%	80%	83%	88%	71%	76%	82%	87%
Complex downloading process	50%	63%	59%	75%	45%	55%	70%	67%
Long wait times for ebooks	58%	56%	45%	60%	49%	59%	58%	47%
Unaware of ebook availability	43%	49%	49%	71%	51%	46%	44%	55%
Digital rights management issues	35%	45%	47%	63%	30%	40%	51%	54%
In demand titles not available for libraries	31%	45%	41%	48%	32%	36%	44%	49%
Limited access to ereading devices	39%	37%	36%	46%	44%	40%	32%	36%
Lack of training	36%	34%	39%	56%	43%	31%	31%	51%
Difficult to find/Discover	23%	26%	30%	37%	25%	22%	29%	38%
Users prefer print	40%	26%	22%	29%	45%	27%	28%	22%
Ebook titles not available concurrent with print release	18%	21%	27%	40%	21%	18%	21%	37%
Difficult to read onscreen/online	6%	12%	8%	15%	10%	8%	8%	14%
Other	5%	4%	5%	0%	6%	5%	4%	6%

Technical Problems

Last year, we noted that as more users were downloading ebooks, libraries saw an increase in the number of people reporting technical problems. Happily, this has faded over the past year, with those reporting technical problems “often” dropping from 20% to 15% (it had been at 11% in 2010). Those reporting technical problems “sometimes” rose two points to 61%, while “rarely” rose five points to 22%. Many libraries have added classes to teach the public about the downloading process and with an average of 2.5 years experience using the technology, are more versed in the process to answer questions from patrons.

Figure 43. How often do your users report technical problems when downloading an ebook?
 % of public libraries



Large libraries report a greater incidence of technical problems than small ones, possibly due to their larger user base.

Table 31. How often do your users report technical problems when downloading an ebook?
 % of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Often	14%	12%	18%	20%	13%	12%	21%	11%
Sometimes	54%	67%	59%	69%	49%	67%	60%	66%
Rarely	26%	22%	22%	11%	30%	21%	17%	22%
Never	6%	0%	1%	0%	8%	0%	2%	1%
2011								
Often	12%	17%	26%	21%	11%	12%	27%	21%
Sometimes	59%	58%	60%	71%	58%	62%	53%	66%
Rarely	22%	22%	13%	6%	24%	22%	17%	11%
Never	6%	3%	2%	2%	7%	4%	2%	2%

General Conclusions

Ebook circulation in public libraries is dramatically increasing. In 2010, average ebook circulation was about 5,000. This grew to 11,000 a year later, and now is at more than 44,000. And public libraries still expect this to increase substantially.

If there is one thing that will deter library users from checking out ebooks, it is the paucity of titles available. In this survey, for the first time, issues related to limited selection and long wait times for desired titles trumped every other barrier to ebook access, even technical problems. The reason is that major publishers either deliberately refuse to license ebooks to libraries or make them cost prohibitive. Simon & Schuster, Macmillan, and Penguin do not sell to libraries, and Hachette withholds the latest titles, although Penguin began an experiment earlier this year. Random House is “free and easy” with its ebook licensing, but recently boosted prices for ebooks by as much as 300%. (See the verbatim comments for some candid thoughts about that.) And HarperCollins has their much-criticized “26 circs and then rebuy” model¹⁰ although some libraries now admit that this is better than nothing.

As for hardware circulation, while only about one-fourth of libraries circulate ereaders, many more are considering it. See the verbatim comments at the end of this and Section 4 for public libraries’ experiences with hardware ereader circulation.

In Their Own Words...

On our 2012 survey, we asked for write-in comments about libraries’ experiences loaning ereaders to customers. Here is a selection of those responses (lightly edited):

- Their [our loaned ereaders] popularity has decreased since the holidays. I think many people got their own devices then.
- Except for being able to try out the devices, because of our tiny budget, I see no reason to get them to loan out.
- They are funded by a grant and only available at a small branch. They are very popular.
- Grant funded program for patrons aged 50 or older
- Have 4 different devices at location to show patrons, list of ereader options for them
- I would like to add them but admin does not.
- Maintaining individual device libraries is daunting and expensive; providing what is wanted will always be problematic.
- Need policy and security concerns.

¹⁰ “E-Books In Libraries,” Berkman Center for Internet and Society at Harvard University, 2012, <http://ssrn.com/abstract=2111396> .

- Our devices are used mostly to help people learn how to use them.
- Patron damage to other electronic devices borrowed is causing us to rethink this idea.
- We actually have a few, but for demonstration only.
- We added a circulation of 100 Nook Simple Touch devices pre-loaded with recent bestsellers, in March. Patrons may check them out for 1 month.
- We are debating whether we have missed the window of opportunity in loaning ereaders.
- We are very close to offering both Nooks (simple touch and color) and the Cloud 3M Reader
- We have a selection of ereaders for teaching purposes and for adult patrons to try before they purchase. We have 8 iPads for children and teens, loaded with age appropriate apps.
- We have devices for patrons to use to learn and test devices, but do not circulate them.
- We have devices that patrons can use during ebook classes. This summer we will have devices at a kiosk for patrons to use in the library.
- We have ereaders to circulate between branches for staff use, but not for patron use
- We have theft issues and don't want to tempt potential thieves.
- We purchased devices for each staff member to practice with—at some point, we will collect them and begin circulating them to our home service patrons.

4. EBOOKS, PRINT BOOKS, AND MATERIALS BUDGETS

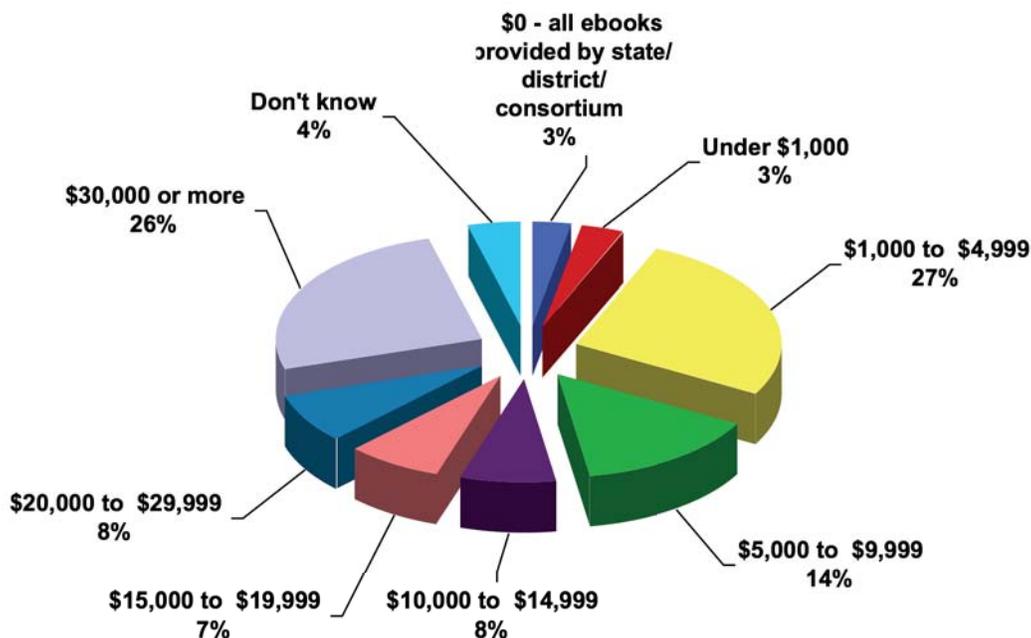
Current Spending on Ebooks

In our 2012 survey, we asked public libraries how much they expect to spend on ebooks in the current fiscal year, as shown in Figure 44 below. Spending figures from our 2011 survey are presented in Figure 45.

Comparing medians, libraries plan to spend about \$10,000 on ebooks in the current fiscal year.¹¹ Compare this to a median of about \$9,500 in the previous fiscal year.¹² Given the differential between the means and the medians (see footnotes), there are some large outliers skewing the means. But note that more than one-third (34% of public libraries plan to spend \$20,000 or more on ebooks in the current fiscal year.

Figure 44. Approximately how much does your library expect to spend on ebook titles this fiscal year?

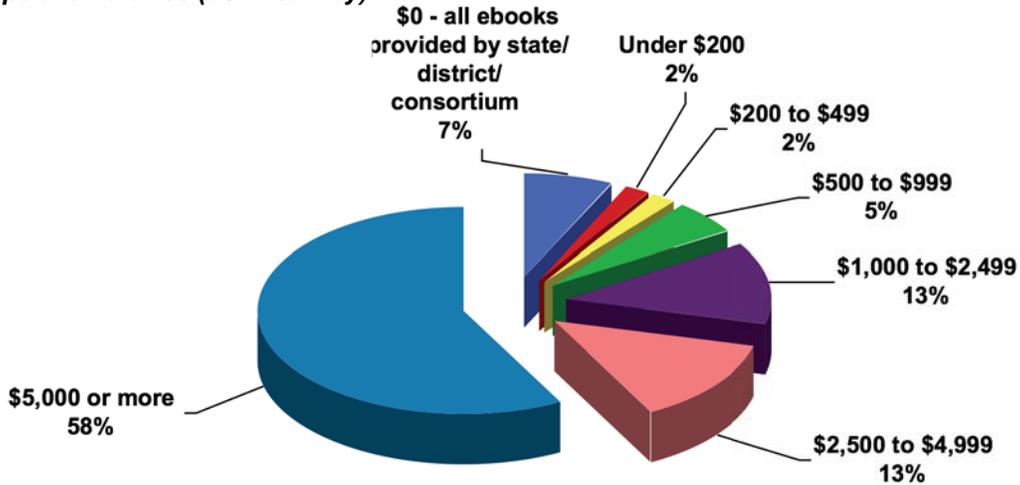
% of public libraries (2012 Survey)



¹¹ Mean spending on ebooks in current fiscal year (2012 survey): \$39,922. Median spending on ebooks in current fiscal year (2012 survey): \$10,403.

¹² Mean spending on ebooks in current fiscal year (2011 survey): \$25,833. Median spending on ebooks in current fiscal year (2011 survey): \$9,500.

**Figure 45. Approximately how much does your library expect to spend on ebook titles this fiscal year?
% of public libraries (2011 survey)**



The differential between means and medians is especially apparent in large libraries.

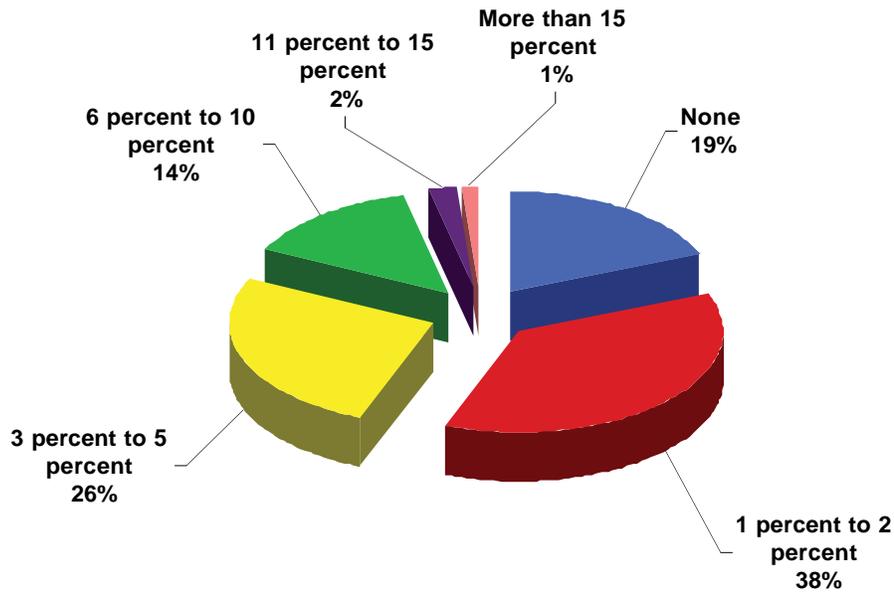
**Table 32. Approximately how much does your library expect to spend on ebook titles this fiscal year?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K-99K	100K-499K	500K+	<\$50K	\$50-\$249K	\$250-\$999K	\$1 Mil+
2012								
\$0 (all ebooks provided by state/district/consortium)	8%	1%	2%	0%	13%	1%	1%	0%
Under \$1,000	11%	0%	0%	0%	15%	2%	0%	0%
\$1,000 to \$4,999	53%	22%	13%	0%	44%	47%	13%	2%
\$5,000 to \$9,999	15%	26%	4%	4%	18%	25%	9%	0%
\$10,000 to \$14,999	4%	13%	5%	8%	2%	8%	12%	8%
\$15,000 to \$19,999	4%	13%	5%	0%	3%	9%	10%	2%
\$20,000 to \$29,999	2%	10%	11%	0%	2%	2%	18%	4%
\$30,000 or more	0%	12%	54%	88%	0%	4%	30%	77%
Don't know	4%	3%	7%	0%	3%	2%	6%	6%
Mean \$	\$4,576	\$16,061	\$61,715	\$195,413	\$4,076	\$8,110	\$24,463	\$158,602
Median \$	\$3,218	\$9,885	\$32,667	\$38,571	\$2,851	\$4,863	\$20,417	\$37,838
2011								
\$0 (all ebooks provided by state/district/consortium)	12%	6%	5%	0%	16%	8%	4%	2%
Less than \$200	7%	1%	1%	0%	7%	2%	1%	0%
\$200 to \$499	6%	0%	1%	3%	7%	1%	1%	1%
\$500 to \$999	20%	5%	0%	0%	25%	6%	3%	0%
\$1,000 to \$2,499	28%	12%	5%	0%	17%	26%	6%	2%
\$2,500 to \$4,999	13%	21%	6%	0%	13%	16%	18%	3%
\$5,000 or more	8%	44%	72%	88%	6%	32%	58%	81%
Don't know	7%	11%	11%	9%	9%	9%	10%	10%
Mean	\$2,140	\$9,689	\$31,387	\$132,701	\$1,742	\$4,748	\$11,611	\$84,036
Median	\$1,750	\$4,875	\$10,000	\$88,000	\$750	\$3,750	\$9,999	\$42,750

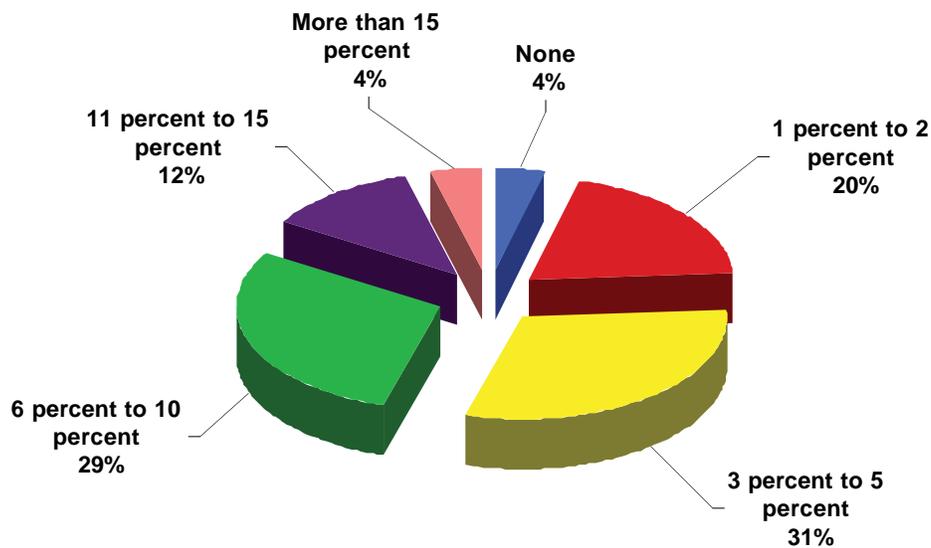
Ebooks in the Materials Budget

According to our 2012 survey, last year ebooks accounted for, on average, 3.3% of public libraries' total materials budget.¹³ This year, that has almost doubled to 6.2%.¹⁴

**Figure 46. What percentage of your library's materials budget did ebooks represent last year?
% of public libraries**



**Figure 47. What percentage of your library's materials budget do ebooks currently represent?
% of public libraries**



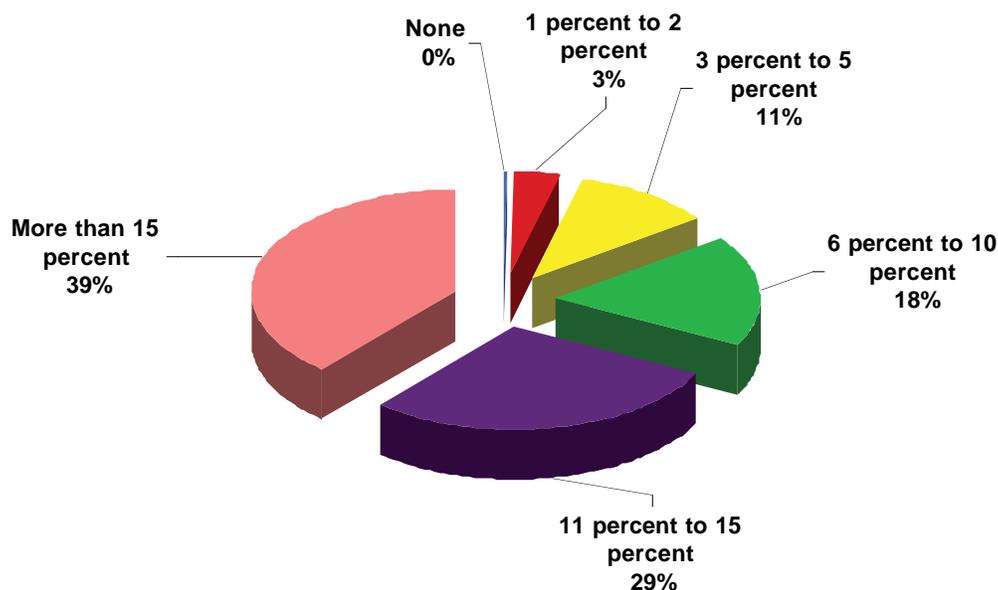
¹³ Mean materials budget % (last year): 3.3%. Median materials budget % (last year): 1.8%.

¹⁴ Mean materials budget % (this year): 6.2%. Median materials budget % (this year): 4.7%.

What will ebooks' share of the materials budget be in five years? In last year's survey, public libraries felt that ebooks would represent, on average, 8.8% of their materials budget in five years (i.e., 2016). In this year's survey, our respondents upped the ante and now feel that ebooks will account for, on average, 12.6% of the materials budget in 2017.¹⁵

An increasing number of public libraries (68%, up from 43% last year, and up from 27% in 2010) feel that ebooks will account for more than 10 percent of their total materials budget in five years' time. Are these budget projections too ambitious, too modest, or on target? Time will tell, but consider: in 2010, 27% of libraries felt that by 2015, ebooks would account for more than 10% of libraries' materials budgets. Here we are, only two years into that five-year period, and already 16% of public libraries report that ebooks represent more than 10% of their total materials budget.

Figure 48. What percentage of your library's materials budget do you predict ebooks will represent in 5 years?
% of public libraries



The mean percentage of materials budget spent on ebooks remains fairly consistent, ranging from a current 5.2% among the smallest libraries (up from 2.5% last year) to 7.5% among the largest (up from 4.0% last year). What is especially notable is the extent to which "none" was in double digits for almost all size libraries, and in the current year is universally less than 10%. In five years, virtually all size libraries expect to be spending more than 10% of their materials budgets on ebooks.

¹⁵ Mean materials budget % (in 5 years): 12.6%. Median materials budget % (in 5 years): 13.4%.

**Table 33. What percentage of your library's materials budget do ebooks represent last year, this year, and what do you expect them to represent in five years?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Last Year								
None	32%	16%	11%	4%	46%	19%	12%	0%
1 percent to 2 percent	35%	41%	30%	38%	27%	38%	42%	33%
3 percent to 5 percent	21%	33%	23%	46%	10%	32%	27%	40%
6 percent to 10 percent	10%	9%	30%	4%	17%	8%	17%	17%
11 percent to 15 percent	3%	0%	4%	4%	0%	2%	2%	6%
More than 15 percent	0%	1%	2%	4%	0%	1%	0%	4%
Mean %	2.5	2.9	4.6	4.0	2.2	3.0	3.3	5.0
Median %	1.5	1.8	3.8	3.4	1.2	1.8	1.9	3.8
This Year								
None	7%	2%	2%	0%	12%	1%	3%	0%
1 percent to 2 percent	29%	21%	15%	0%	27%	28%	14%	6%
3 percent to 5 percent	33%	32%	26%	39%	27%	35%	31%	34%
6 percent to 10 percent	18%	33%	28%	48%	12%	26%	36%	40%
11 percent to 15 percent	9%	10%	23%	4%	15%	7%	14%	13%
More than 15 percent	5%	1%	6%	9%	7%	3%	2%	6%
Mean %	5.2	5.8	7.5	7.5	5.6	5.4	6.4	7.5
Median %	3.9	4.7	6.9	6.9	3.8	4.2	6.2	6.9
In Five Years								
None	0%	1%	0%	0%	2%	0%	0%	0%
1 percent to 2 percent	4%	4%	4%	0%	7%	2%	3%	2%
3 percent to 5 percent	21%	10%	6%	0%	17%	19%	6%	0%
6 percent to 10 percent	23%	17%	12%	17%	19%	20%	21%	13%
11 percent to 15 percent	28%	28%	24%	35%	26%	25%	33%	29%
More than 15 percent	23%	40%	54%	48%	29%	33%	37%	56%
Mean %	10.6	12.7	14.1	14.5	10.9	11.6	12.9	14.9
Median %	11.2	13.6	16.3	14.8	11.8	12.3	13.4	16.4

Reallocation of Funds

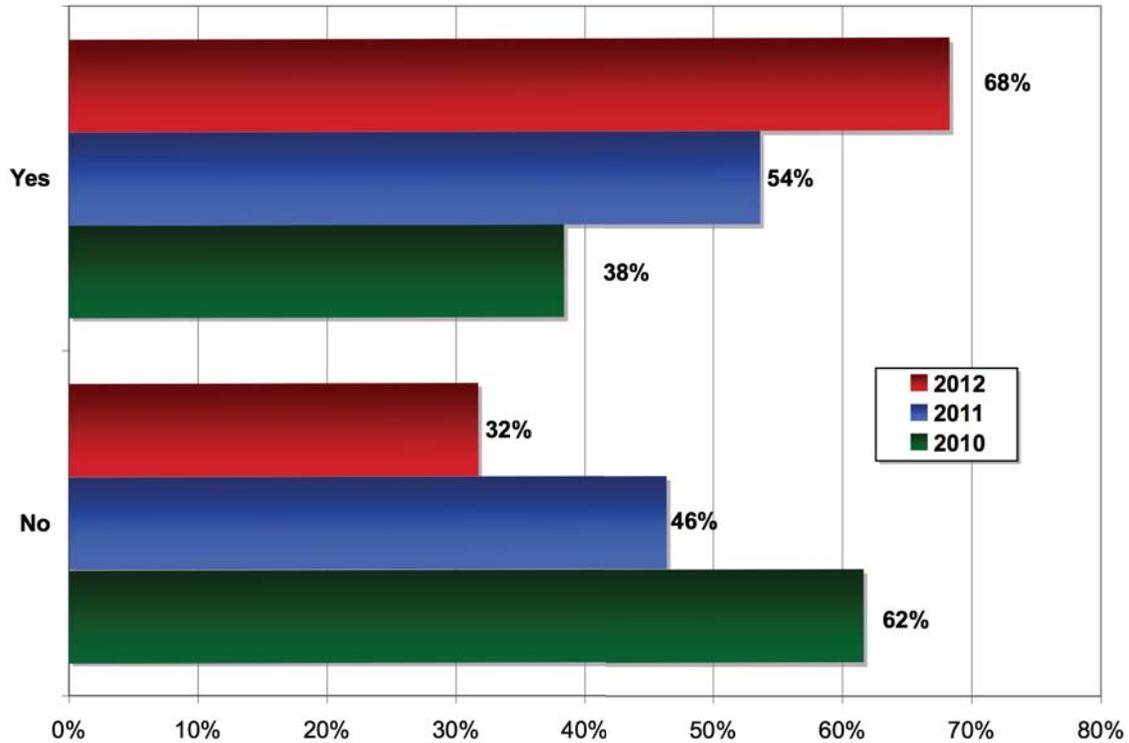
Given the finite nature of library budgets, it is logical to ask if libraries are reallocating funds from print or other physical materials to pay for ebooks. What is the longterm trend?

Well, it doesn't look good for print materials. In our 2010 survey, 38% said they reallocated funds. Last year, that rose to more than one-half (54%) of respondents. Now, in 2012, almost seven out of ten (68%) public libraries say they reallocate funds from print or other physical materials to pay for ebooks.

We have yet to see where the "stasis" between physical and downloadable budgets will be. But given the expectations in the previous question about the growth in ebooks as a percentage of the overall materials budget, it seems like it may be a long way off. And yet, given that ebook circulation may be reaching a plateau (as we saw earlier in this report), perhaps that stasis point may come

sooner. For now, though, unless public libraries see some kind of financial windfall, reallocation makes financial sense.

Figure 49. In the past year, did your library reallocate funds from its physical materials formats to pay for electronic, downloadable copies?
 % of public libraries



Small libraries are the least likely to reallocate any funds from physical to electronic media—but this climbs to almost eight out of ten (78%) of the largest libraries.

Table 34. In the past year, did your library reallocate funds from its physical materials formats to pay for electronic, downloadable copies?
 % of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
Yes	50%	71%	80%	78%	47%	67%	68%	80%
No	50%	29%	20%	22%	53%	33%	32%	20%
2011								
Yes	43%	52%	58%	65%	38%	49%	57%	63%
No	57%	48%	42%	35%	62%	51%	43%	38%

General Conclusions

Average spending on ebooks is almost doubling each year, and ebooks represent an ever-expanding percentage of libraries' overall materials budgets. One point mentioned earlier bears repeating: In 2010, 27% of libraries felt that by 2015, ebooks would account for more than 10% of their materials budgets. And now, only two years into that five-year period, 16% of public libraries already report that ebooks represent more than 10% of their total materials budget.

As libraries acquire a larger and larger collection of legacy and backlist titles, overall purchasing will level off and decrease, as they will only need to keep up with current releases (or, in the case of HarperCollins titles, keep re-buying older titles once the 26 circs are up).

However, it doesn't look good for print, as an ever-increasing number of libraries are reallocating funding from print titles (and elsewhere in their materials budgets) to pay for ebooks. This probably means fewer print copies of new releases, but also less frequent replacement of worn and damaged backlist titles.

Whether the dramatic increases in spending will continue remains to be seen, and among academic libraries we have already seen a saturation point starting to be reached. Are public libraries far behind?

A couple major factors will affect this: Will the public become frustrated with the limited availability of titles, long wait times, and complicated downloading processes and give up on ebooks, either through libraries or entirely? Or will publishers smooth the friction that currently exists and provide ebooks to libraries at a reasonable price?

In Their Own Words...

Another question we added to our 2012 survey asked for libraries' experiences and perspectives on "the day to day upkeep of ereading devices." Here are those verbatim responses (lightly edited).

- Actually takes very little time and with only 4 only weekly not daily.
- Branch staff do upkeep when the ereaders come back.
- Circulation staff checks and gives to IT as needed upon check-in.
- Cleared after each use.
- Devices are cleared immediately upon check-in and then connected to the charger by circulation staff.
- Devices are reset in factory defaults after each patron use. Devices are charged in a dedicated room when returned.
- Devices are returned to the Reference Desk where they are checked over by librarians. We return to library defaults, charge and prepare for the next patron. At branch libraries, circulation staff handle the upkeep.

- One of three employees handles the devices, depending on who is working when they are returned.
- Only for the Sony Readers since they are not preloaded; we hard (factory) reset them between checkouts.
- Only staff can download to a device. Staff check settings and place on chargers after each use, or at end of day as needed.
- Patron downloads usually expire after so many days so cleaning them out isn't an issue. They have to sign a form and agree to certain terms before we check one out to them. Charger is included in the check out and if they don't return it to us they will be charged for it. There hasn't been a lot of day to day upkeep for the staff.
- Readers are taken out of circulation for a short period of time to reconfigure them for checkout.
- Reference staff take the returned devices and complete the step by step process outlined by Overdrive for Sony Readers.
- Reset to factory setting each time the ereader is returned. Anything the patron has put on the machine is automatically erased.
- Specific circulation staff at each location are assigned to handle these tasks when the ereading devices are returned. Staff complete the tasks before the ereading device is made available to the next patron on the waiting list.
- The charging cord is circulated with the device. It is wiped down and the information on it erased after each use. Then it is fully charged and sent back out for circulation.
- The library places large notices with the devices giving users instructions to purge their personal information. At the present time, the library inspects each device and resets it when it is returned.
- We clear and charge each device when it is returned. We also check that the purchased ebooks are intact on each device after each circulation.

5. LIBRARIES AND EBOOK VENDORS

In this section, we look at the vendors that public libraries patronize, those that they prefer, and what ebook attributes are of the most importance to libraries.

Vendors Patronized and Preferred

OverDrive is by far the top vendor patronized by public libraries for ebooks, largely because they are one of the only games in town; 92% of libraries buy through OverDrive, unchanged from last year, and up from 77% in 2010. A very distant second, at 35%, is Gale Virtual Reference Library (last year, Gale/Cengage was at 21%). Project Gutenberg, which was added to the survey in 2012, checks in at 22% of public libraries, a likely source for public domain titles and classics. EBSCOhost, which has acquired NetLibrary since our last survey, is at 20%. In last year's survey, NetLibrary was selected by 22% of libraries, while EBSCOhost was selected by 10%. Going forward, it will be especially interesting to track the uptake for 3M Cloud Library, Baker & Taylor's Axis360 and Library Ideas' Freading products. These relative newcomers to the public library space are each actively building their product offerings and customer base.

For clarity, we only included the 2012 survey data in Figure 50 below. (See Figure 51 for 2011 survey results.)

Figure 50. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)
 % of public libraries (2012 Survey)

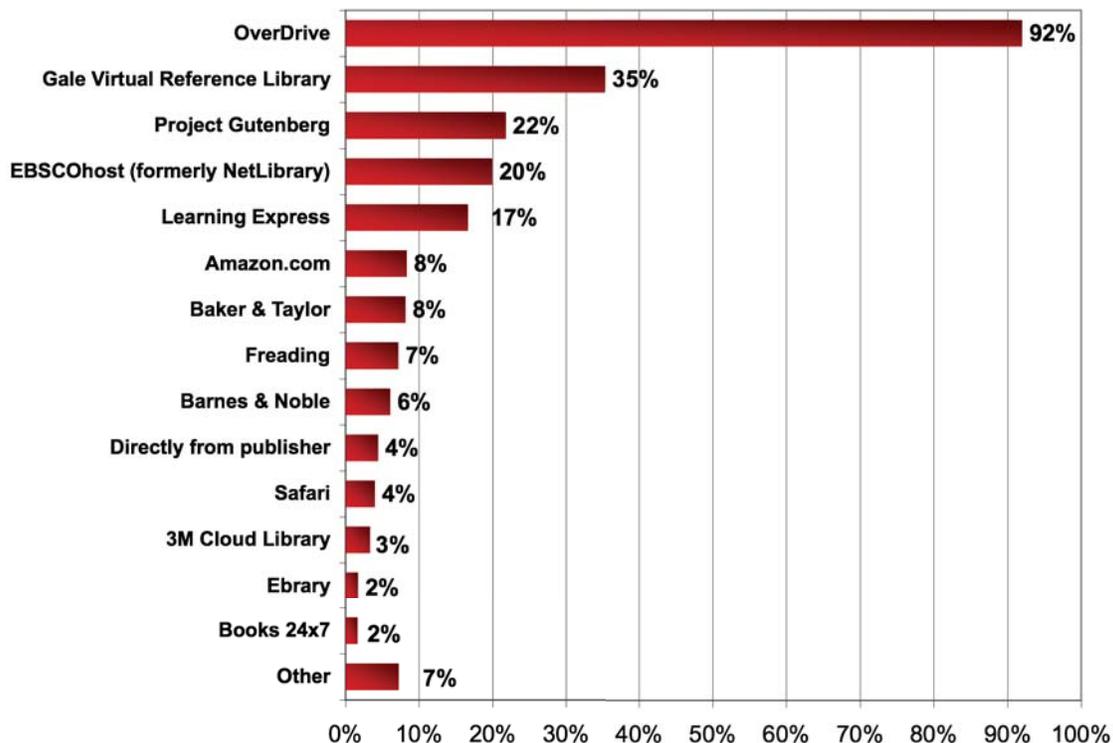
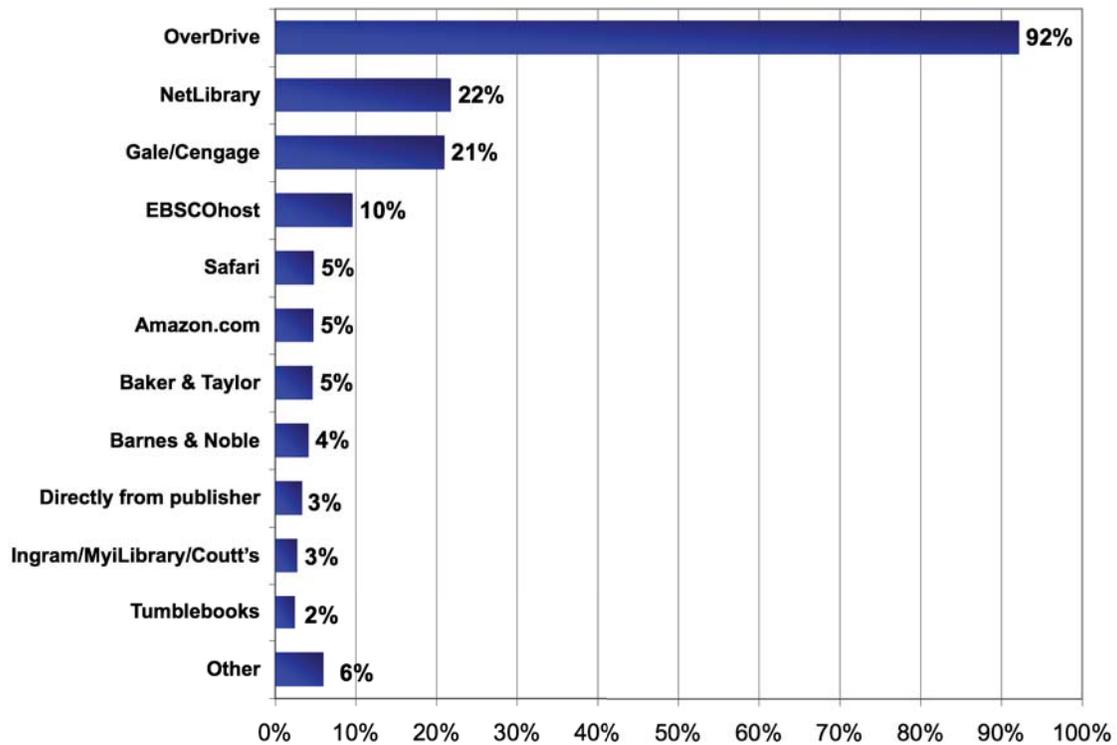


Figure 51. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)

% of public libraries (2011 survey)



Larger libraries are more likely than small libraries to acquire ebooks from Gale Virtual Reference Library and EBSCOhost. They are also more likely to avail themselves of Project Gutenberg.

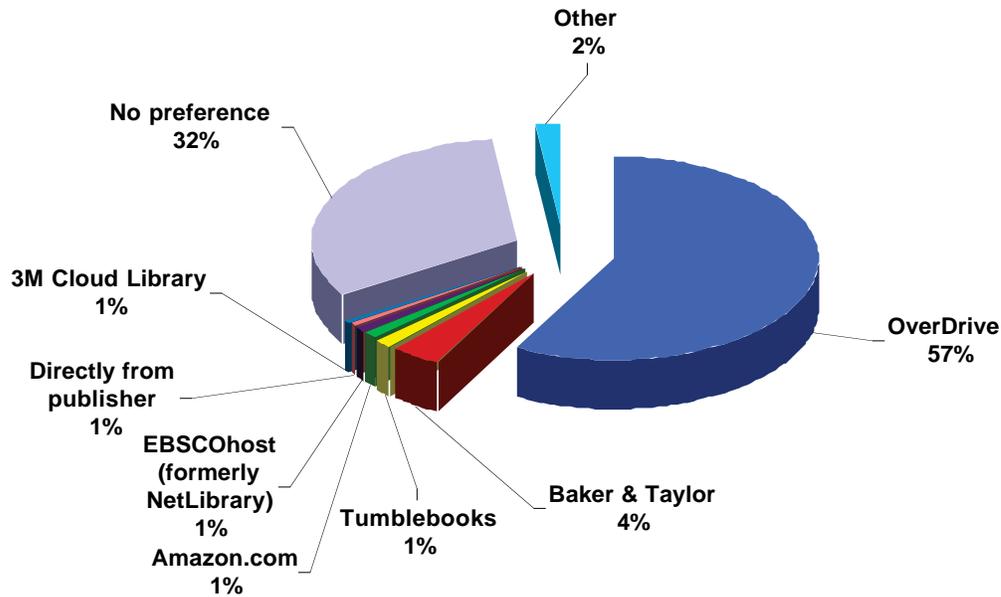
Table 35. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
OverDrive	85%	95%	93%	100%	83%	90%	96%	98%
Gale Virtual Reference Library	12%	33%	54%	63%	7%	21%	43%	69%
Project Gutenberg	15%	18%	26%	50%	17%	17%	14%	46%
EBSCOhost (formerly NetLibrary)	4%	19%	32%	42%	3%	11%	26%	40%
Learning Express	5%	13%	26%	33%	0%	11%	25%	25%
Amazon.com	12%	11%	4%	0%	15%	10%	7%	2%
Baker & Taylor	3%	3%	16%	17%	3%	7%	6%	13%
Freanding	8%	7%	7%	4%	7%	4%	12%	6%
Barnes & Noble	8%	5%	7%	8%	5%	6%	10%	4%
Directly from publisher	2%	1%	9%	8%	0%	3%	6%	6%
Safari	1%	1%	7%	13%	0%	1%	3%	13%
3M Cloud Library	2%	3%	4%	4%	0%	3%	6%	2%
Ebrary	0%	5%	0%	4%	0%	3%	1%	2%
Books 24x7	0%	1%	0%	13%	0%	0%	0%	8%
Ingram/MyiLibrary/Coutt's	1%	0%	2%	4%	0%	1%	1%	2%
Credo Reference (WRITE IN)	0%	1%	4%	0%	0%	0%	3%	2%
iTunes	1%	0%	2%	0%	2%	0%	1%	0%
Tumblebooks	0%	0%	0%	0%	0%	0%	0%	0%
Other	5%	3%	2%	4%	3%	2%	6%	4%
2011								
OverDrive	84%	93%	92%	100%	76%	94%	91%	99%
NetLibrary	12%	19%	24%	47%	15%	17%	15%	36%
Gale/Cengage	5%	15%	30%	47%	7%	7%	25%	36%
EBSCOhost	4%	7%	14%	18%	3%	9%	10%	11%
Safari	0%	4%	6%	15%	0%	1%	3%	15%
Amazon.com	14%	2%	3%	6%	15%	5%	2%	5%
Baker & Taylor	2%	5%	5%	3%	3%	6%	4%	2%
Barnes & Noble	8%	3%	3%	6%	3%	7%	4%	3%
Directly from publisher	5%	3%	3%	6%	7%	2%	2%	5%
Ingram/MyiLibrary/Coutt's	2%	3%	2%	3%	1%	3%	1%	5%
Tumblebooks	1%	2%	4%	3%	1%	2%	3%	3%
Learning Express	0%	0%	3%	0%	0%	2%	1%	0%
Ebrary	0%	3%	0%	0%	0%	2%	2%	0%
iTunes	0%	0%	1%	0%	0%	0%	1%	0%
Open Road	0%	0%	0%	3%	0%	0%	0%	1%
Other	4%	3%	3%	6%	3%	2%	4%	5%

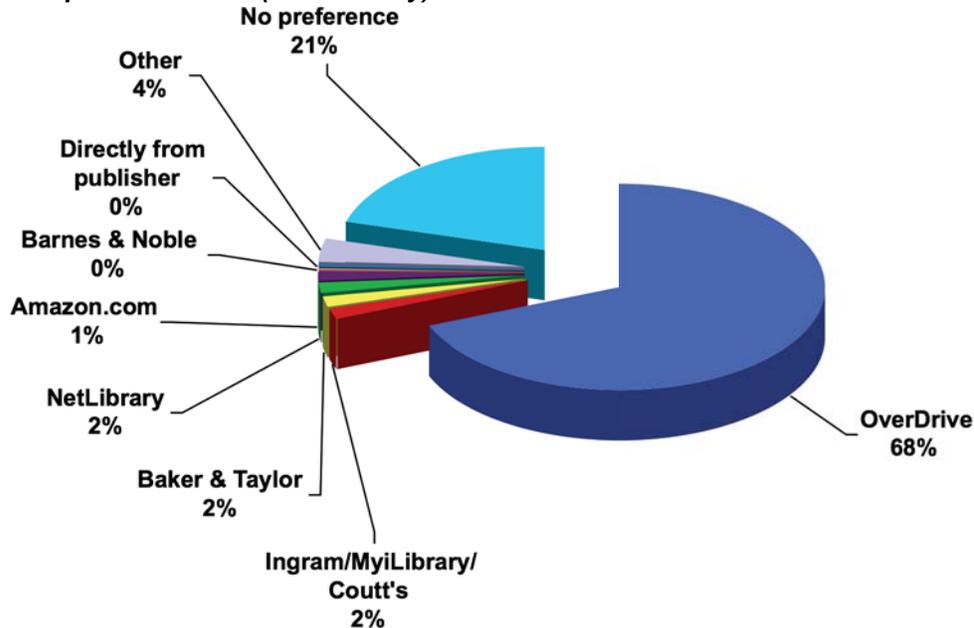
Preferred Vendors

When asked a follow-up question about the vendor that libraries *prefer* to work with, OverDrive was the only vendor with any significant response (57% down from 69% last year, and only up from 55% in 2010). Almost one-third (32%, jumping up from 21% last year) said “no preference.” As the verbatim comments throughout this report indicate, librarians are generally less than thrilled with any ebook vendor.

**Figure 52. Which is your preferred ebook vendor?
% of public libraries (2012 Survey)**



**Figure 53. Which is your preferred ebook vendor?
% of public libraries (2011 survey)**



Vendor preference—or lack thereof—is fairly consistent across all library sizes. Moderately large libraries (100,000–499,999 population served) are more likely to prefer Baker & Taylor than other libraries, up from 2% among these folks last year.

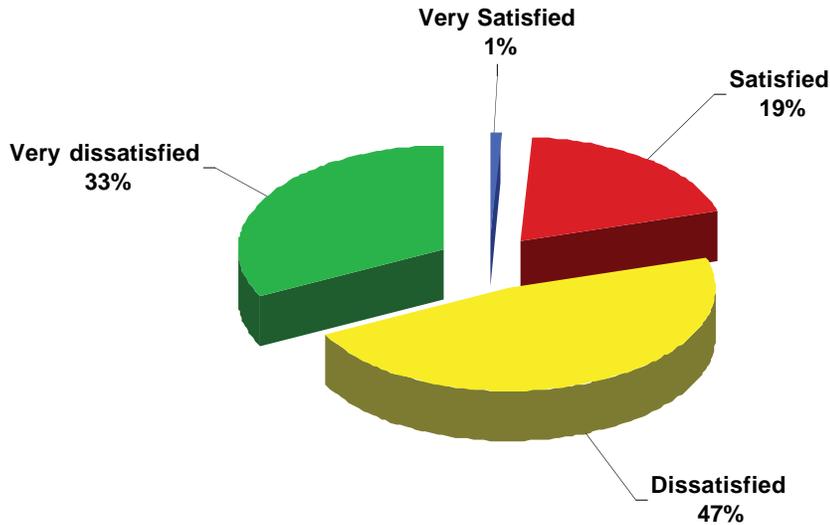
**Table 36. Which is your preferred ebook vendor?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
OverDrive	57%	59%	61%	58%	57%	54%	64%	60%
Baker & Taylor	1%	1%	11%	0%	3%	3%	1%	4%
Tumblebooks	0%	2%	2%	0%	0%	1%	3%	0%
Amazon.com	2%	1%	0%	0%	3%	1%	0%	0%
EBSCOhost (formerly NetLibrary)	1%	0%	2%	0%	2%	0%	0%	2%
Directly from publisher	0%	0%	2%	0%	0%	0%	1%	0%
3M Cloud Library	0%	1%	0%	0%	0%	0%	1%	0%
Barnes & Noble	1%	0%	0%	4%	0%	1%	0%	2%
Ingram/MyiLibrary/Coutt's	0%	0%	0%	4%	0%	0%	0%	2%
Gale Virtual Reference Library	0%	1%	0%	0%	0%	0%	0%	2%
Freeding	1%	0%	0%	0%	2%	0%	0%	0%
Project Gutenberg	1%	0%	0%	0%	2%	0%	0%	0%
No preference	37%	35%	23%	33%	33%	40%	29%	27%
2011								
OverDrive	59%	72%	69%	74%	54%	71%	70%	73%
Ingram/MyiLibrary/Coutt's	2%	2%	1%	3%	1%	3%	1%	1%
Baker & Taylor	1%	1%	2%	3%	1%	1%	2%	2%
NetLibrary	3%	1%	2%	0%	4%	2%	0%	1%
Amazon.com	3%	2%	1%	0%	6%	1%	2%	0%
Barnes & Noble	1%	1%	0%	0%	0%	2%	0%	0%
Directly from publisher	1%	0%	0%	0%	1%	0%	0%	0%
Other	3%	5%	4%	0%	7%	4%	2%	3%
No preference	27%	16%	21%	21%	24%	17%	24%	19%

Discounts

Are public librarians satisfied with the discounts they get from ebook vendors? Not at all: a full 47% are “dissatisfied” and a further 33% are “very dissatisfied.” Only 20% are at all satisfied, and only a scant 1% is “very satisfied.” Given the tone of most of the verbatim comments regarding pricing, it’s surprising that as many as 20% of libraries are satisfied.

**Figure 54. How satisfied are you with discounts off of list you receive from ebook vendors?
% of public libraries**



Counterintuitively, it’s the smallest libraries that seem the happiest with their vendor discounts.

**Table 37. How satisfied are you with discounts off of list you receive from ebook vendors?
% of public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Very Satisfied	3%	0%	0%	0%	2%	0%	3%	0%
Satisfied	24%	19%	16%	16%	28%	26%	9%	13%
Dissatisfied	42%	53%	45%	52%	49%	43%	50%	50%
Very dissatisfied	30%	28%	38%	32%	21%	31%	38%	38%

Important Attributes

On our questionnaire, we asked public libraries to rate the importance of a variety of attributes when considering an ebook vendor, on scale from “not important” to “very important.” Figure 55 below presents the net “very important/important” results from our 2012 survey. For comparison, we present the 2011 results in Figure 56.

Not unexpectedly, the most vitally important attributes are a mixture of pricing, selection, and device support. The top item—selected by 100% of our public library respondents—was “fair price.” A common theme throughout this report is that technical issues are being resolved, device compatibility is being resolved, but issues regarding price remain top challenges for libraries. Hence “fair price” rose to the top of our important attributes (not that it was very far down last year; it had been selected by 99% of libraries in 2011).

“Wide selection of titles and formats” holds steady at 99%; “multiple device options offered” slips two places to 98%; and “user-friendly interface” slips one point to 98%. Very few of these attributes have dropped and, if they have, it was not significant. We added a new item, “cloud-based access model” to the 2012 survey, and it was selected by 51% of respondents.

Figure 55. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) % of public libraries (2012 Survey)

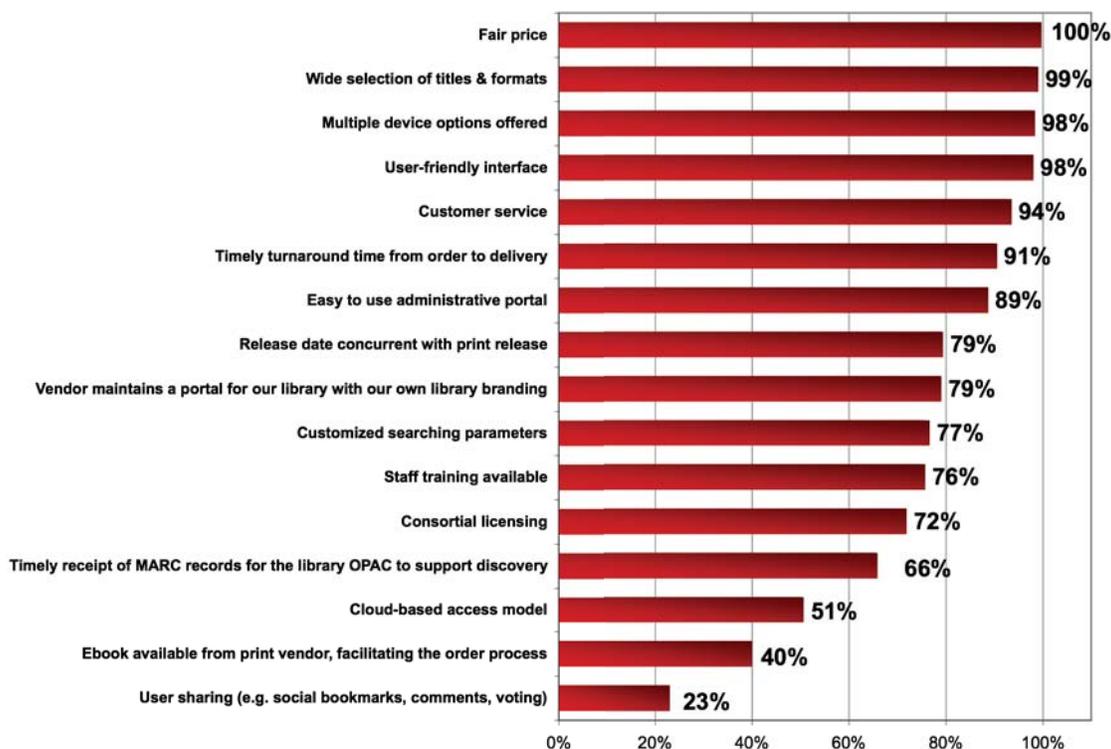


Figure 56. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)
% of public libraries (2011 survey)

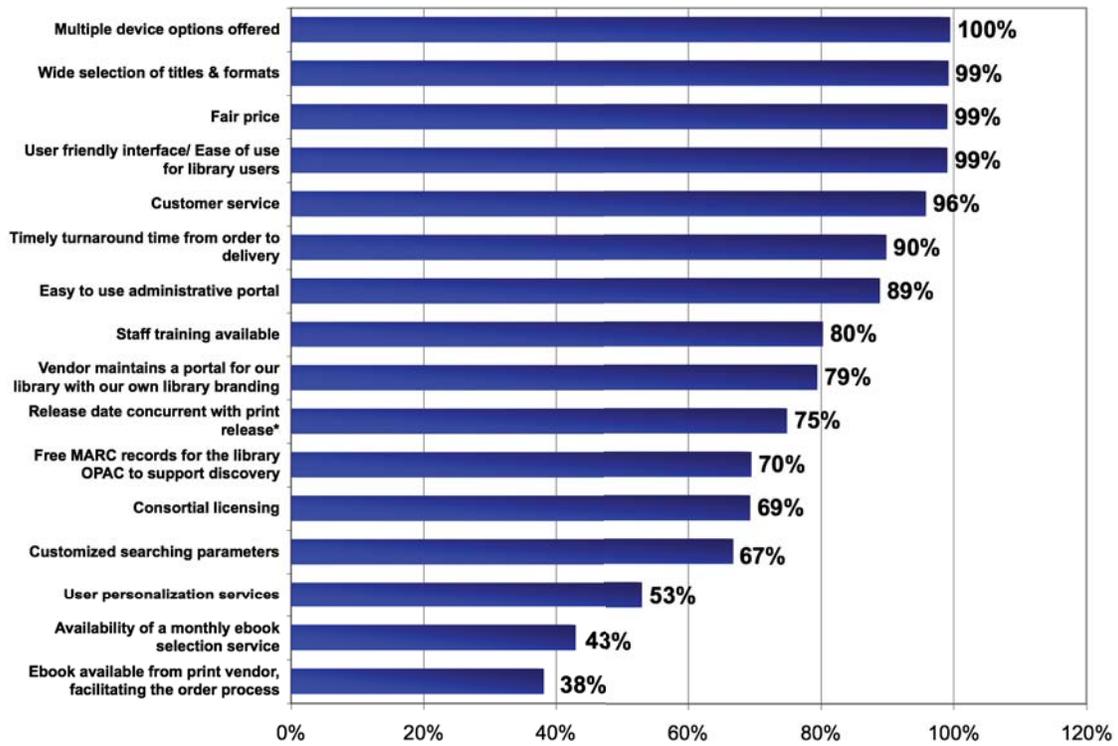


Table 38. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)
% of public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2012								
User-friendly interface	99%	98%	96%	100%	98%	99%	97%	98%
Multiple device options offered	97%	99%	98%	100%	96%	99%	99%	98%
Easy to use administrative portal	93%	87%	88%	92%	96%	88%	90%	87%
Vendor maintains a portal for our library with our own library branding	85%	71%	82%	95%	84%	78%	75%	87%
Wide selection of titles & formats	99%	100%	98%	100%	98%	100%	98%	100%
Fair price	99%	100%	100%	100%	100%	99%	100%	100%
Customer service	96%	91%	95%	96%	95%	93%	94%	92%
Timely receipt of MARC records for the library OPAC to support discovery	64%	62%	65%	83%	61%	60%	67%	77%
Timely turnaround time from order to delivery	88%	93%	91%	92%	85%	94%	90%	91%
Staff training available	82%	73%	79%	67%	86%	76%	70%	75%

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Ebook available from print vendor, facilitating the order process	38%	42%	38%	38%	50%	41%	29%	40%
Customized searching parameters	70%	76%	80%	83%	76%	74%	73%	81%
Release date concurrent with print release	82%	86%	71%	78%	82%	87%	73%	78%
Cloud-based access model	64%	50%	45%	35%	57%	59%	53%	36%
User sharing (e.g. social bookmarks, comments, voting)	29%	22%	19%	26%	30%	26%	20%	22%
Consortial licensing	82%	79%	64%	12%	90%	77%	80%	25%
2011								
Multiple device options offered	100%	99%	100%	100%	99%	99%	100%	100%
User friendly interface	99%	99%	99%	100%	99%	98%	100%	99%
Wide selection of titles & formats	99%	99%	99%	100%	98%	98%	100%	100%
Fair price	98%	99%	99%	100%	100%	99%	99%	98%
Timely turnaround time from order to delivery	83%	90%	91%	97%	81%	86%	92%	95%
Customer service	93%	97%	98%	94%	94%	94%	97%	98%
Vendor maintains a portal for our library with our own library branding	70%	75%	86%	91%	66%	69%	86%	90%
Easy to use administrative portal	85%	90%	93%	85%	86%	91%	87%	91%
Free MARC records for the library OPAC to support discovery	62%	68%	72%	85%	63%	65%	70%	79%
Release date concurrent with print release*	75%	78%	74%	85%	72%	75%	75%	86%
Staff training available	74%	80%	81%	85%	73%	79%	81%	85%
Customized searching parameters	61%	69%	66%	72%	57%	66%	69%	69%
User personalization services	48%	53%	59%	52%	43%	56%	52%	58%
Availability of a monthly ebook selection service	43%	42%	48%	44%	37%	43%	41%	55%
Consortial licensing	87%	78%	58%	39%	85%	81%	70%	51%
Ebook available from print vendor, facilitating the order process	40%	38%	38%	38%	34%	43%	40%	35%

General Conclusions

OverDrive is currently the most common ebook vendor in public libraries. OverDrive's support for the Kindle was met with overwhelming enthusiasm last year. However, as the verbatim comments below (and elsewhere in this report) show, libraries have mixed feelings about OverDrive (or "OverLord" as one respondent quipped).

"Price" and "selection" became the two biggest attributes that libraries look for in ebooks and ebook vendors, supplanting ease-of-use issues for most libraries.

As we say every survey, publishers and vendors should pay particular attention to the attribute importance ratings, and read them through the lens of the verbatim comments provided throughout this report. There is definitely a growing demand for ebooks in public libraries and libraries are prepared to pay for a user-friendly, library-friendly usage model. But they can only pay so much.

In Their Own Words...

Our final set of verbatim comments comprises the solicited responses to libraries' experiences and perspectives on ebook pricing (lightly edited).

- Annual fee to vendor is also very expensive.
- A big increase in March was shocking.
- Book prices on “Overlord” have steered us away from that platform.
- Disgruntled with price hikes, but received some sale discounts.
- Ebook prices are too expensive. I understand to have a book in perpetuity should cost more, but I’m not certain the price should be as high as it is.
- Frankly, a purchase-with-set-#-of-circs model would be preferable. I do not believe, though, that books should be treated as a subscription, rather that copies could be purchased for archiving by any library and circulated a reasonable number of times before having to purchase a new copy. I have hardback books that have circulated 50 or even 100 times over the course of several years, but I have other culturally important books that may have circulated 50 times over 50 years. The 26 circs per year model needs tinkering but eventually could work.
- Hard to build a collection when prices are so high, not to mention those with the 26 checkout limit.
- I have not encountered discounts from ebook vendors.
- Haven’t used any vendors other than Overdrive as we have mostly Kindle users and other products aren’t compatible.
- I am dissatisfied that prices are increasing though publishers’ costs for ebooks is static and low.
- I have noticed an increase in pricing for certain titles.
- I think the HarperCollins’ limited circs model, or the Freading cost/download model are probably the most “fair.” Hopefully, they will spread and standardize. I do not like the Random House x3 pricing—that’s simply absurd.
- I used to be mad at HarperCollins for their 26-checkout limit, but now I prefer to purchase from them. Random House is completely irresponsible in their pricing to libraries, and we refuse to buy their titles. Sorry to see that Penguin is no longer selling titles to libraries, as we have enormous hold lists for books and can’t do anything about it.
- Increases in pricing from some publishers has greatly discouraged our purchasing habits.
- It is RIDICULOUS! Just when I think they can’t get more expensive, they keep going up. And when books become popular the price SKYROCKETS! I just don’t know what to do with it.

- It's the publishers' pricing that seems to be the issue, such as Random House's recent triple increase.
- Look at Random House pricing on OverDrive. Absolutely ridiculous.
- Now that more ebook vendors are coming on board the pricing is getting much more reasonable. Don't understand what is taking so long.
- One publisher's price has TRIPLED within the last few months. I really have to think long and hard before spending \$75.00 for an ebook.
- Pricing as we all know is absurd! There is no relationship between prices asked and the real cost to the vendor to provide this content.
- Pricing is all over the map. Particularly disappointed with recently tripling of ebook prices by some vendors. Subscription based books should be priced like paperbacks because they are virtual paperbacks.
- Pricing is out of control. The publishers are at war with libraries.
- Pricing is unfair and intended to drive libraries out of the ebook market.
- Pricing is way too high and I'm not sure who is driving the pricing model, the publishers or third-party vendors. In any case most of the problems getting ebooks are square in the laps of the publishers who refuse to see ebooks as just another format and adapt to it. No library in the world is going to stop private purchase of ebooks by the public any more than our having paper books stops people from buying paper books!
- Pricing model from Random House has led us to not purchase any RH content, severely limiting user access to many bestselling titles. Paying \$75–90 for an ebook is not fiscally responsible in our minds.
- Publishers are sticking it to libraries when it comes to ebook pricing. The cost to produce ebooks is much less than producing printed books, but then some publishers fear that a library will purchase one ebook and circulate it without limits to anybody, so they jack up the prices to "defend" against such practices. It's nonsense. Make no mistake. Publishers currently see public libraries as competition, not allies, and it is a shame.
- Publishers have been horrid to libraries—I won't buy HarperCollins or most Random House titles because of their excessive charges to us.
- Publishers need to understand that ebooks are the same as hard copies. They have sold books to libraries for years, selling to libraries is not going to drastically hurt their sales. Only so many people are going to buy books—electronic or otherwise.
- Publishers' pricing for ebooks for libraries is ridiculously expensive. Vastly unfair for libraries given the lack of government funds for libraries in this recession. Especially unfair given the typical \$9 price tag for Kindle ebooks, and the lack of "gift" ebooks libraries get from patrons

compared to print format gifts. Libraries have helped encourage literacy and reading for centuries, and publishers are treating them very unfairly!

- Some publishers are fair, Random House is greedy, others big publishers should be taken to court for refusing to sell to libraries.
- The prices were reasonable when we signed on with OverDrive and then went up to a point where we purchase slightly older titles instead of new releases.
- The publishing industry charges too much and places absurd restrictions on lending—one copy, one reader; limits on the number of circulations; titles that are only good for a set time and so on. Publishers need to see libraries and librarians as allies in exploring new options and publicity for ebooks, ereaders and other digital endeavors.
- There are no discounts. We are forced to pay retail prices or above, and some publishers are gouging, which reduces the number of copies of in-demand titles that we are able to purchase.
- There are no discounts. In fact, bestsellers are often more expensive. Pricing is completely arbitrary and uncontrollable.
- There is no discount. We sometimes pay triple the print cost.
- We are buying less Random House titles because of the enormous price increase recently.
- We are purchasing from one vendor/platform so options are limited—prices are outrageous for most.
- We are satisfied because we buy, or subscribe to, only multiple simultaneous user, i.e. streaming, products and these tend to have discounts based on population size. (As a small library we couldn't afford anything like Overdrive.)
- We do not get discounts, Random just raised their prices to the point where we may stop buying and Harper's cap makes us think twice before we purchase. Penguin pulling out of OverDrive makes it difficult to offer a solid collection.
- We don't get any discounts from ebook vendors and publishers like Random House are making ebooks un-affordable.
- We don't get discounts and some publishers are charging 3X the cost of the print book.
- We don't get discounts off list for ebooks. At least through Overdrive we don't. I am very partial to the pay-per-use model. No, we don't own the content but we can provide access to it for our customers at a reasonable rate.
- We receive no discounts for ebooks, in fact, we pay more than hardcover price for many items.

- What discounts? The prices we pay are higher than consumers and much higher than we pay for physical copies. With the Random House price increase I seriously have to consider purchasing those titles as it's hard to justify the expense.

APPENDIX: PUBLIC LIBRARIES QUESTIONNAIRE

The Survey Methodology

The present report is one-third of an overall survey that included school and academic libraries, in addition to public libraries.

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 May 4, 2012 to June 16, 2012. 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 a \$499 Apple iPad was offered as incentive to reply.

The survey closed with 820 public libraries from across the country 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 1,053 U.S. public libraries in 2011 and 781 U.S. public libraries in 2010.

Public Library ebook Questionnaire

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

2. How would you describe your library's location?

- Urban
- Suburban
- Rural

3. Which of the following comes closest to your job title?

- Library director/Ass't library director
- Branch manager/Library manager
- Head librarian/Department head
- Reference/Information Services librarian
- Adult/Public services librarian
- Children's librarian/Children's services librarian
- Young Adult librarian/Youth services librarian
- Electronic resources librarian
- Technical Services librarian
- Collection development/Materials selection librarian
- Acquisitions librarian
- Systems librarian
- Circulation librarian
- Cataloging librarian
- Library administrator
- Technology coordinator
- Library aide
- Other (please specify) _____

4. 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) _____

5. 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

6. What is your library's total materials budget for the current fiscal year? (Please answer in U.S. dollars)

- Less than \$25,000, specify _____
 \$25,000 - \$49,999
 \$50,000 - \$99,999
 \$100,000 - \$249,999
- \$250,000 - \$499,999
 \$500,000 - \$999,000
 \$1 - \$2.49 million
 \$2.5 million or more, specify _____

7. How long has your library offered access to ebooks?

- We do not offer ebooks [if no ebooks, skip to Q45]
 Less than 1 year
 1 to 2 years
 3 to 4 years
 Over 4 years

8. 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

9. 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 # _____

10. 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

11. Does your library buy ebooks independently?

- Yes
 No

12. 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 # _____

13. What percent of the ebook usage in your library would you estimate consists of circulated ebooks versus ebooks viewed online for reference?

- % ebooks circulated _____%
 % ebooks viewed online _____%

14. Approximately, what was your total ebook circulation/usage in 2011?

FY 2011 circulation/usage _____

15. 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? _____ %

16. Is your library able to track circulation/usage statistics for ebooks available through the state or consortium?

- Yes
- Not always
- No
- N/A

17. Which categories of ebooks does your library currently offer users? Check all that apply.

- Bestsellers
- General adult fiction (including backlist)
- General adult nonfiction (including backlist)
- Graphic novels
- Young adult fiction
- Young adult nonfiction
- Children's fiction
- Children's nonfiction
- Children's picture books
- Reference
- Classics
- Other (specify) _____

18. What are your top three circulating or most requested fiction ebook categories? (Please select up to three)

- | | |
|--|--|
| <input type="checkbox"/> Bestsellers | <input type="checkbox"/> Mystery/Suspense |
| <input type="checkbox"/> Children's | <input type="checkbox"/> Romance |
| <input type="checkbox"/> Christian fiction | <input type="checkbox"/> Science Fiction |
| <input type="checkbox"/> Classics | <input type="checkbox"/> Street Lit |
| <input type="checkbox"/> Fantasy | <input type="checkbox"/> Thriller |
| <input type="checkbox"/> General adult fiction | <input type="checkbox"/> Women's fiction |
| <input type="checkbox"/> Historical fiction | <input type="checkbox"/> Young adult |
| <input type="checkbox"/> Horror | <input type="checkbox"/> Other (Specify) _____ |
| <input type="checkbox"/> Literary fiction | <input type="checkbox"/> No fiction ebooks |

19. What are your top three circulating or most requested nonfiction ebook categories? (Please select up to three.)

- | | |
|--|---|
| <input type="checkbox"/> General reference | <input type="checkbox"/> How-to |
| <input type="checkbox"/> Bestsellers | <input type="checkbox"/> Humor |
| <input type="checkbox"/> Biography/Memoirs | <input type="checkbox"/> Medicine |
| <input type="checkbox"/> Business/Careers | <input type="checkbox"/> Political/Current events |
| <input type="checkbox"/> Computers/Technology | <input type="checkbox"/> Religion/Spirituality/Philosophy |
| <input type="checkbox"/> Cooking | <input type="checkbox"/> Self-help/Psychology |
| <input type="checkbox"/> Crafts/Hobbies | <input type="checkbox"/> Sports/Recreation |
| <input type="checkbox"/> Health/Fitness/Weight loss | <input type="checkbox"/> Test prep |
| <input type="checkbox"/> History | <input type="checkbox"/> Travel |
| <input type="checkbox"/> Home decorating & Gardening | <input type="checkbox"/> Other (Specify)_____ |

20. Approximately what is the breakdown of adult versus children's versus young adult ebooks available in your library?

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

21. If possible, please identify three age groups you perceive to be the most active ebook users in your library. You may check up to three choices.

- Ages 55 +
 Ages 45 to 54
 Ages 35 to 44
 Ages 25 to 34
 Ages 18 to 24
 Young adult/teen
 Ages 12 and under
 No idea

22. In which format do users generally prefer ebooks? Check all that apply

- PDF
 Full-text HTML
 ePub
 Optimized for dedicated ebook device (e.g., Nook, Sony Reader)
 Optimized for other mobile device (e.g., smartphone, iTouch, etc.)
 Don't know yet, ebooks haven't caught on in my community
 Other (specify)_____

23. What device(s) do your library users most often use to read circulating/trade ebooks? Check all that apply.

- Personal Laptop/Computer/Netbook
 Dedicated ebook reader (e.g., Nook, Kindle, Sony Reader)
 Tablet (e.g., iPad)
 Smartphone or other mobile device
 Library computer
 Other (specify)_____

24. Are users able to download ebooks to their own devices inside your library?

- Yes, we have a dedicated download station
 Yes, on our internet computers
 No, downloads must be made offsite

25. Does your library have ereading devices available for patrons to borrow?

- Yes, but for in-library use only
 Yes, for take home use
 Not currently, but considering
 No and no plans to acquire

Comments (optional): _____

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

- | | |
|---|--|
| <input type="checkbox"/> Kindle | <input type="checkbox"/> NOOK Tablet |
| <input type="checkbox"/> Kindle Fire Tablet | <input type="checkbox"/> Apple iPad |
| <input type="checkbox"/> Kobo Reader | <input type="checkbox"/> Other Tablet |
| <input type="checkbox"/> Sony Reader | <input type="checkbox"/> iPod Touch or similar |
| <input type="checkbox"/> NOOK | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> NOOK Color | |

27. [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

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

29. [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

30. How do you handle the day-to-day upkeep of ereading devices (Cleaning out patron downloads, setting up library defaults and charging)?

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

- | | |
|--|---|
| <input type="checkbox"/> Limited titles available | <input type="checkbox"/> In demand titles not available for libraries |
| <input type="checkbox"/> Difficult to find/discover | <input type="checkbox"/> Lack of training |
| <input type="checkbox"/> Difficult to read onscreen/online | <input type="checkbox"/> Complex downloading process |
| <input type="checkbox"/> Long wait times for ebooks | <input type="checkbox"/> Unaware of ebook availability |
| <input type="checkbox"/> Digital rights management issues | <input type="checkbox"/> Ebook titles not available concurrent with print release |
| <input type="checkbox"/> Limited access to e-reading devices | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Users prefer print | |

32. How often do your users report technical problems when downloading an ebook?

- Often
 Sometimes
 Rarely
 Never

33. Are you involved in the recommendation/purchasing process of ebooks for your library?

- Yes
- No (If No, skip to Q44)

34. What factors influence your decision to purchase a particular ebook for your library? (Check all that apply)

- Projected usage/High demand titles/bestsellers
- User request
- Licensing terms/Lending caps (e.g., Harper Collins' 26 circs model)
- Availability as a single title purchase
- Inclusion in bundles with attractive pricing
- Book reviews
- Limited shelf space
- Relaxed Digital Rights Management
- Ease of purchase/Integrated purchasing with print book
- Special grant
- Cost
- Reduces material loss
- Other (Please specify) _____

35. Is your library considering purchasing and/or licensing ebook originals or self-published ebooks?

- Yes, we currently offer e-originals or self-published ebooks
- We are considering e-originals or self-published ebooks
- No, not in the near future

36. What type(s) of purchasing terms does your library typically use when acquiring ebooks?

- Purchase with perpetual access
- Purchase with perpetual access through self-hosting
- License with set # circs model
- Subscription
- Pay-per-use
- Bundled with other content
- Patron-driven acquisition
- Upfront purchase with maintenance fee
- Upfront purchase with update fee
- Concurrent use/access
- Other (specify) _____
- Don't know

37. Approximately what percentage of your library's materials budget did ebooks represent last year, do they currently represent and what percentage do you predict ebooks will represent in 5 years?

	0%	1% - 2%	3% - 5%	6% - 10%	11% - 15%	More than 15%
Last year	<input type="checkbox"/>					
Currently	<input type="checkbox"/>					
In 5 years	<input type="checkbox"/>					

38. 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

39. In the past year, did your library reallocate funds from its physical materials formats to pay for electronic, downloadable copies?

- Yes No

40. How satisfied are you with discounts off of list you receive from ebook vendors?

- Very satisfied
- Satisfied
- Dissatisfied
- Very dissatisfied

41. From which vendor(s) does your library acquire ebooks? (Check all that apply)

42. Which is your preferred ebook vendor?

	Q41. ebook vendor(s) you purchase from	Q42. One Preferred ebook vendor
3M cloud library	<input type="checkbox"/>	<input type="checkbox"/>
Amazon	<input type="checkbox"/>	<input type="checkbox"/>
Baker & Taylor	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble	<input type="checkbox"/>	<input type="checkbox"/>
Books24x7	<input type="checkbox"/>	<input type="checkbox"/>
Ebrary	<input type="checkbox"/>	<input type="checkbox"/>
EBSCOhost (formerly NetLibrary)	<input type="checkbox"/>	<input type="checkbox"/>
Freeding	<input type="checkbox"/>	<input type="checkbox"/>
Gale Virtual Reference Library	<input type="checkbox"/>	<input type="checkbox"/>
Ingram/MyiLibrary/Coutt's	<input type="checkbox"/>	<input type="checkbox"/>
iTunes	<input type="checkbox"/>	<input type="checkbox"/>
Learning Express	<input type="checkbox"/>	<input type="checkbox"/>
Open Road	<input type="checkbox"/>	<input type="checkbox"/>
OverDrive	<input type="checkbox"/>	<input type="checkbox"/>
Project Gutenberg	<input type="checkbox"/>	<input type="checkbox"/>
Safari	<input type="checkbox"/>	<input type="checkbox"/>
Tumblebooks	<input type="checkbox"/>	<input type="checkbox"/>
Directly from publisher	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
No Preference		<input type="checkbox"/>

43. Please rate the importance of the following attributes when considering an ebook vendor?

	Very Important	Important	Somewhat Important	Not Important	No Opinion
User friendly interface	<input type="checkbox"/>				
Multiple device options offered (iPad, Sony Reader, Smartphone, etc.)	<input type="checkbox"/>				
Easy to use administrative portal	<input type="checkbox"/>				
Vendor maintains a portal for our library with our own library branding	<input type="checkbox"/>				
Wide selection of titles & formats	<input type="checkbox"/>				
Fair price	<input type="checkbox"/>				
Customer service	<input type="checkbox"/>				
Timely receipt of MARC records for the library OPAC to support discovery	<input type="checkbox"/>				
Timely turnaround time from order to delivery	<input type="checkbox"/>				
Staff training available	<input type="checkbox"/>				
Ebook available from print vendor, facilitating the order process	<input type="checkbox"/>				
Customized searching parameters	<input type="checkbox"/>				
Release date concurrent with print release	<input type="checkbox"/>				
Cloud based access model	<input type="checkbox"/>				
User sharing (e.g., social bookmarks, comments, voting)	<input type="checkbox"/>				
Consortial licensing	<input type="checkbox"/>				

44. If you have any comments about ebooks in your library, please write them below. (After answering, skip to incentive Question 47.)

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

45. 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)_____

46. 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)_____

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