

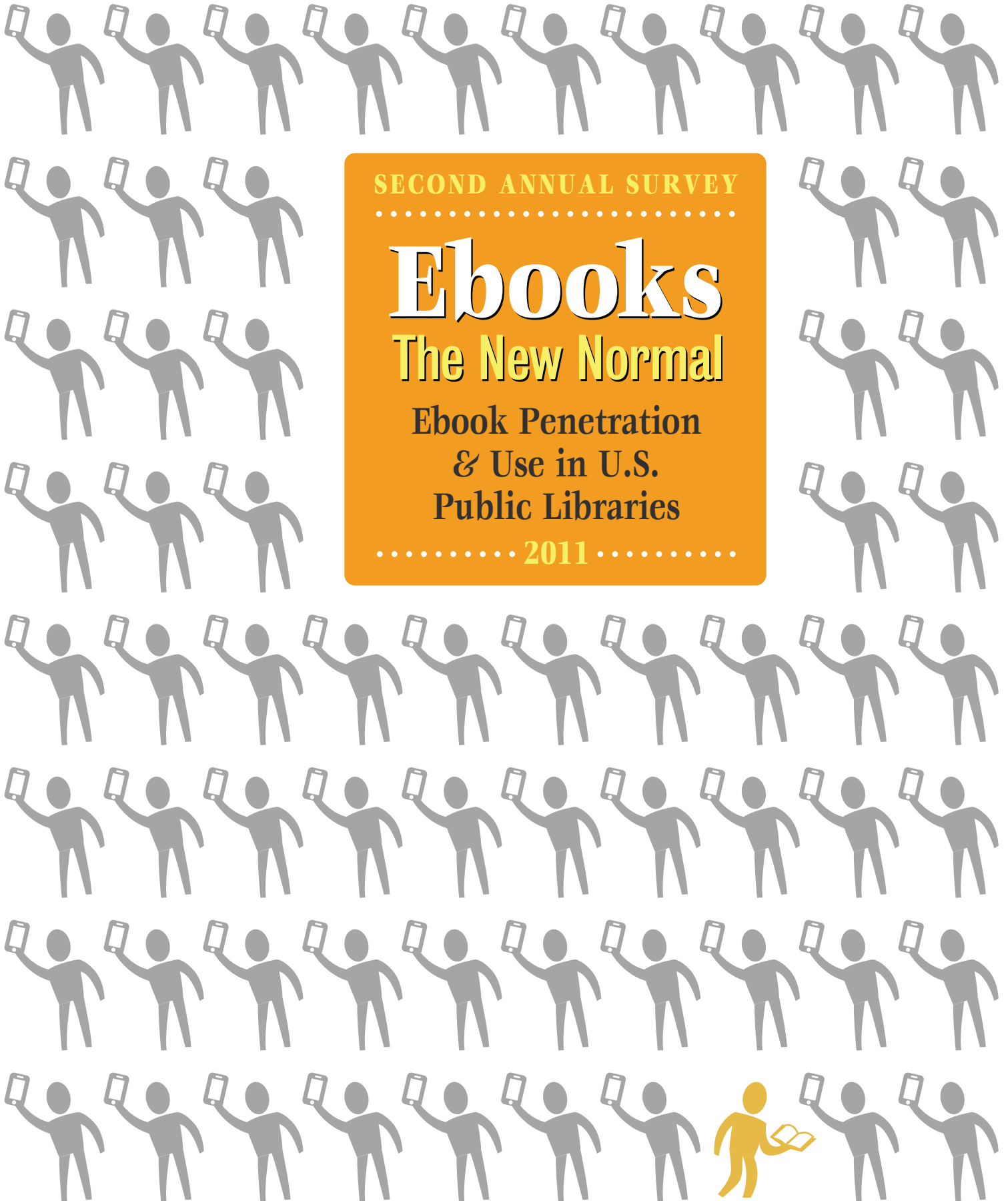
SECOND ANNUAL SURVEY

Ebooks

The New Normal

Ebook Penetration
& Use in U.S.
Public Libraries

..... 2011



RESEARCH

LIBRARYJOURNAL / School Library Journal

Survey of Ebook Penetration & Use in U.S. Public Libraries

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EXECUTIVE SUMMARY

Ebooks have been on the upswing for the past two years, but libraries really began to see a spike in the last year. In fact, many respondents to our second annual *Library Journal Survey of Ebook Use in U.S. Public Libraries* saw demand grow right after Christmas 2010. Armed with a variety of new devices that hit the market in 2010, library patrons marched in to their local library or visited their library's website in order to discover and download content. Nearly two-thirds (66%) of the 1,053 respondents to our 2011 survey said they had experienced a “dramatic” increase in requests for ebooks in the past year.

Part of the increase in demand was inspired by the new devices themselves. Barnes & Noble rethought and redesigned its Nook. A new version of the Apple iPad was released to much hoopla. Lower-cost ereaders such as the Kobo Reader and others that are short on bells and whistles but high on readability also helped expand the ebook market. With a new holiday season just around the corner and a slate of cheaper devices hitting the market (Amazon will be selling a basic Kindle version for as low as \$79), we can expect another round of the same.

One happy consequence, as found in this survey, is that libraries reported more users coming to public libraries to use their ebook collections. Just over three-fourths (76%) of public library respondents said that they have attracted new users to the library by offering ebooks. Almost half of respondents (43%) are aware of customers who are “e” only and decline to borrow print editions. For context: as recently as 2009, almost two-thirds of public libraries (62%) reported not circulating *any* ebooks—a scant two years later, that number is now 21%. This illustrates how quickly things change, and how readily public libraries have adapted with them.

Meeting the Demand for Ebooks

More than eight in ten public libraries (82%) currently offer ebooks. This is up from the 72% that reported the same in last year's survey. Of the 18% of libraries *not* currently offering ebooks, 49% say they *definitely* plan to in the next 12 months.

Patrons are responding. Actual ebook circulation more than doubled from 2009 to 2010.

	FY 2009	FY 2010
Mean FY 2009 ebook circulation (including 0)	5,138	11,281

And, the survey found, almost all respondents (96%) expect ebook circulation to increase again this year compared to last year. The projected overall rise in ebook circulation expected is 108%.

	2010	2011
Overall % change expected	+36%	+108%

Major drawbacks for public libraries continue to be limits on simultaneous usage of ebooks and circulation caps (for example, HarperCollins' controversial announcement that it would only allow an ebook title to circulate 26 times before a new copy had to be purchased¹). It is frustrating for library patrons to have to place a hold on an ebook title when they know that simultaneous use of an ecopy is possible in other settings. Explaining to users why they have to wait to check out an ebook—sometimes weeks or longer—may be among the hardest parts of many public librarians' jobs today.

For patrons, the process is not getting easier. For them, the biggest barriers to ebook usage are device-compatibility, download complexity, and long wait times. Twenty percent of respondents indicate that users often report technical problems when downloading ebooks. Some users get frustrated and give up.

"Ease of use is one of the biggest issues with ebooks. The initial set up, and registration of the software, and then the check for compatibility is where many patrons get stuck. Once past that point there are a lot fewer problems."

Barriers to user ebook access...	2010	2011
Incompatibility with preferred reading devices	50%	80%
Complex downloading process	45%	60%
Long wait times for ebooks	n/a	52%
Unaware of ebook availability	59%	49%
Digital rights management issues	37%	46%
In demand titles not available for libraries	n/a	41%
Limited access to ereading devices	44%	38%
Lack of training	48%	37%
Difficult to find/Discover	37%	29%
Users prefer print	34%	28%
Ebook titles not available concurrent with print release	n/a	24%
Difficult to read onscreen/online	21%	10%
Other	8%	2%
Limited collection	40%	n/a
Difficult to annotate	3%	n/a
Awkward interface	28%	n/a

Ereading Devices and Formats

Ebook readers and portable devices are climbing in popularity in public libraries. A dedicated ebook reader was identified as the "device of choice" by 85% of public libraries responding, up dramatically from 52% last year. Usage of other portable devices, such as iPads or smartphones, also surged, from 36% to 61%.

¹ See, for example, Josh Hadro, "HarperCollins Puts 26 Loan Cap on Ebook Circulations," *Library Journal*, Feb 25, 2011, http://www.libraryjournal.com/lj/home/889452-264/harpercollins_puts_26_loan_cap.html.csp.

Personal laptops dropped from 61% to 53%. Fewer patrons are using the library's computers to read ebooks (dropping from 16% to 4%).

Device(s) on which library users most often read ebooks...	2010	2011
Dedicated ebook reader (e.g., Nook, Kindle, Sony Reader)	52%	85%
Other portable device (e.g., iPad, Smartphone, etc.)	36%	61%
Personal laptop/ Computer/Netbook	61%	53%
Don't know	25%	11%
Library computer	16%	4%
Other	2%	1%

Only 15% of public libraries with ebooks circulate preloaded ereaders (up from 7% last year.) Not surprisingly, the biggest concern around this practice (aside from the cost of the devices) is potential loss of or damage to the device. (Also, this question asked about "preloaded" readers; some libraries reported circulating non-preloaded devices.) Of the libraries that do circulate ereaders, the mean number of devices maintained is 16.

Libraries that circulate ereaders most often offer the Barnes & Noble Nook (75%), presumably the new NookColor. The earlier black-and-white Nook was only circulated by 10% of libraries in the 2010 survey. Forty-seven percent of public libraries circulate Amazon Kindles (up from 30%), while the Sony Reader is gradually losing favor (down from 41% to 36%). Kindle's share of the library market will most definitely increase now that OverDrive/Amazon allow ebook lending for the Kindle.

The standard ePub format is pulling away from the pack as the preferred ebook format, chosen by 63% of public libraries, up from 44% last year. Formats optimized for specific devices (like Barnes & Noble's Nook) also saw increased uptake, climbing to 40% of respondents from 35%. (There is some overlap in these choices, as ePub is the format optimized for the iPad's iBook app, for example.) Generic PDF is losing favor, selected by 23% of respondents, down from 42%.

Preferred ebook format(s)...	2010	2011
ePub	44%	63%
Optimized for dedicated ebook device (e.g., Nook, Sony Reader)	35%	40%
Optimized for other mobile device (e.g., Smartphone, iTouch)	24%	23%
PDF	42%	23%
Don't know	n/a	15%
Full text HTML	20%	6%
Don't know yet, ebooks haven't caught on in my community	23%	2%
Other	8%	1%

Ultimately, public library users will drive format choice. Patrons have their desired or favored devices, and they expect that their library's ebook collection will be compatible with those.

Refining the Lending Process

In terms of usage licensing, 68% of public libraries said their licenses specify the use of a single ebook copy by a single patron at a time (essentially a print book circulation model). This is up substantially from 41% last year. Twenty-two percent (up from 12%) reported they license unlimited or simultaneous use of an ebook title (when available from the vendor).

In the past year, public library ebook circulation intervals have been getting shorter, likely in response to increased demand for titles. On average, the circulation interval for ebooks is now one to two weeks, with two-thirds of respondents citing 14 days (doubling from 32% last year), and 37% citing seven days (a leap up from 6% last year). User-specified circulation is falling out of favor, dropping from 21% to 13%.

Where simultaneous access is not available, it is now almost universal that libraries let customers place holds on downloadable ebooks—with 91% of public libraries allowing holds on ebooks, up from 78% last year. Just about two-thirds (65%) of public libraries buy extra digital copies to fulfill holds; the average holds-to-copy ratio is 6 to 1.

What's Moving in Libraries

Ebook users are driving library purchasing decisions. The top two factors that influence a library's decision to purchase an ebook for its collection are "projected usage/high demand titles" (selected by 94% of respondents, up from 77% last year) and "user request" (up to 84% from 64% a year ago).

We asked public libraries about their top circulating fiction and nonfiction categories of ebooks. For fiction, bestsellers came out on top at 90% of respondents (up from 83%), followed by mystery/suspense (relatively unchanged at 63%), and general fiction (53%, up from 48%).

In nonfiction, biography/memoirs surged ahead, growing from 50% of public libraries last year to 74% in 2011. Political/current events also grew (from 35% to 42%), as did history (22% to 32%).

Top three circulating fiction ebook categories...	2010	2011
Bestsellers	83%	90%
Mystery/Suspense	62%	63%
General fiction	48%	53%

Top three circulating nonfiction ebook categories...	2010	2011
Biography/Memoirs	50%	74%
Political/Current events	35%	42%
History	22%	32%

Ebook Marketing

Most of the marketing and promotion metrics were up this year from last year, demonstrating that public libraries are actively promoting their ebook collections to users, and employing a variety of channels to do so.

The top promotion tool is a branded digital collection on the library's website, selected by 87% of public library respondents, up from 52%. The number two ebook marketing strategy is the library's general online public access catalog (OPAC), selected by 78%, down slightly from 80%. "Word of mouth," added to this year's survey, was chosen by 74% of respondents.

"One of my managers shared with me that when we ran ads on the radio and the newspaper, the circ on Ebooks was up 400%. That's HUGE for us."

Ebooks, Budgets and Purchasing Terms

On average, libraries expect to spend almost \$26,000 (median \$9,500) on ebooks this year. Projected to the public library universe (and accounting for libraries that do not offer ebooks), approximately \$72 million will have been spent on ebooks in public libraries nationwide in 2011.

That number is likely to grow rapidly. Last year ebooks comprised, on average, about 2% of public libraries' materials budgets. This year, ebooks have grown substantially and now represent, on average, 4%. And in five years (2016), respondents project that ebooks will account for 8.8% of the materials budget. Almost half of public libraries (43%) project that ebooks will account for more than 10% of their total materials budget by 2016.

The editors at *Library Journal* suspect that this five year spending projection is conservative. Five years is a long way off in this arena, considering the rapid gains over the past year, the enthusiastic adoption of ebooks in the culture at large, and the deepening engagement in creating best practices for getting ebooks into the hands of library patrons. Other factors that will drive up that projection is the money yet to enter the market from libraries not currently offering ebooks, the boost in popular titles available if and when publisher hold-outs (namely Macmillan, Simon & Schuster, and Hachette) start to allow library ebook lending, and the availability of library ebooks on Kindles both through Amazon and OverDrive.

Towards a Fair and Realistic Model

According to last year's survey, few libraries were fans of the current licensing models for ebooks. The 2011 survey asked public library respondents what they felt would be a "fair and realistic" ebook licensing model. The top response was "unlimited circulation using one reader/one book model," selected by 59%. A close second (chosen by 54%) was "maximum access." Almost half (46%) are interested in patron driven acquisition, following the trend of ebook buying decisions primarily based on user demand. Not surprisingly, a "lending cap model" like the widely criticized HarperCollins cap at 26 circs was ranked at only 6%, tied for last with a "one-year interval."

What do you feel would be a fair and realistic model for licensing ebooks?	
Unlimited circls using one reader/one book model	59%
Maximum access (multiple users allowed simultaneous access)	54%
Patron driven acquisitions model (multiple titles available, purchase based on holds)	46%
Opportunity to license for varying # of circulations	32%
2 year interval	11%
Other	7%
Lending cap model (e.g., 26 circls HarperCollins model)	6%
1 year interval	6%

Libraries and Their Vendors

OverDrive, NetLibrary, and Gale/Cengage were the top three ebook vendors used by public libraries, with OverDrive used by 92%. The most preferred vendor is OverDrive, but only by 69% of respondents.

Ebook vendors patronized... (multiple responses permitted)	
OverDrive	92%
NetLibrary	22%
Gale/Cengage	21%
EBSCOhost	10%
Safari	5%
Amazon.com	5%
Baker & Taylor	5%
Barnes & Noble	4%
Directly from publisher	3%
Other	3%
Ingram/MyiLibrary/Coutt's	3%
Tumblebooks	2%
Learning Express	1%
Ebrary	1%
iTunes	0%
Open Road	0%

Public libraries' expectations of their ebook vendors include a mixture of multiple device support, ease of use, and pricing. All of our public library respondents (100%) noted they want "multiple device options offered." A close second is a three-way tie at 99% among last year's number one, "wide selection of titles and formats"; "fair price"; and "user-friendly interface" (added to 2011 survey). None of the attributes measured have become less important.

"Discounted pricing and licensing without restrictions, such as those recently imposed by Harper Collins, would help us build and maintain our collections, and enable us to better meet demand. We will not order titles from publishers that limit the number of uses per title."

Very important/Important ebook vendor attributes	2010	2011
Multiple device options offered	98%	100%
Wide selection of titles & formats	100%	99%
Fair price	98%	99%
User friendly interface/Ease of use for library users	98%	99%
Customer service	94%	96%
Timely turnaround time from order to delivery	85%	90%
Easy to use administrative portal	82%	89%
Staff training available	76%	80%
Vendor maintains a portal for our library with our own library branding	76%	79%
Release date concurrent with print release		75%
Free marc records for the library OPAC to support discovery	68%	70%
Consortial licensing	56%	69%
Customized searching parameters	49%	67%
User personalization services	43%	53%
Availability of a monthly ebook selection service	40%	43%
Ebook available from print vendor, facilitating the order process	34%	38%

Conclusions

Demand for ebooks on the part of library users is rising sharply, driving public libraries' wholesale investments in ebook collections. With that demand, though, come requirements. This survey makes clear that users have their favorite devices and they want a simplified way to get library ebooks on them. They also want immediate access to desired titles. They don't understand, nor should they have to, the minutiae of digital rights management. These issues are trumping all other concerns, even ease of use.

What public libraries need and want are a wide selection of ebook titles that are easy to download, fairly priced, and formatted to work on multiple devices with a simultaneous usage model. If publishers and vendors could provide this, libraries would pay for the convenience and many libraries that are not currently offering ebooks would sign up, supporting the growth of the ebook market as a whole.

INTRODUCTION

About the 2011 Library Journal Ebook Survey

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

Our 2011 survey repeats the majority of questions from last year's survey and yields some eye-opening trends. Ebooks are very quickly becoming the new normal in public libraries. When we look back and see that as recently as 2009, almost two-thirds of public libraries reported not circulating *any* ebooks—and seeing what that number is now, a scant two years later—we are astounded at how quickly things change, and how readily public libraries have been able to change with them.

The questionnaire includes some follow-up questions to what we had asked on the first survey, and some tailored answer choices based on the results of the first survey.

We also asked two open-ended questions. The first concerned libraries' experiences with ebook collections, ebook adoption, specific issues and comments, and relationships with vendors. A handful of these responses are added at the ends of Chapters 2, 3, and 4. We also asked for respondents' opinion of the recent news of the OverDrive/Amazon agreement that will allow Kindle users to download OverDrive titles. These responses appear at the end of Chapter 5.

The questionnaire and methodology are included in the Appendix.

Structure of This Report

Each section of this report is laid out in basically the same way, each of which provides various levels of detail. The bulk of each section 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.

Each chart includes both the 2011 data as well as the 2010 data (where the same question was asked in 2010) for comparison. We've indicated on the charts where we altered some of the response choices from the last survey.

Phrasing of responses and even the order of responses on a questionnaire can have profound effects on the results one gets, but we feel confident that the vast majority of the responses support a comparison with last year's survey. However, in those cases where data are not completely congruent, we've called attention to it.

In some cases, adding both surveys' datasets would have made a chart unreadable, so we elected to use just the 2011 data and highlight any substantial changes in the accompanying commentary.

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 2011 and 2010 data for those who want to compare the entirety of both datasets.) We have 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 and it’s a mistake to assume that all libraries think and act alike. A public library that serves a large urban population will have a different set of needs and attitudes 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

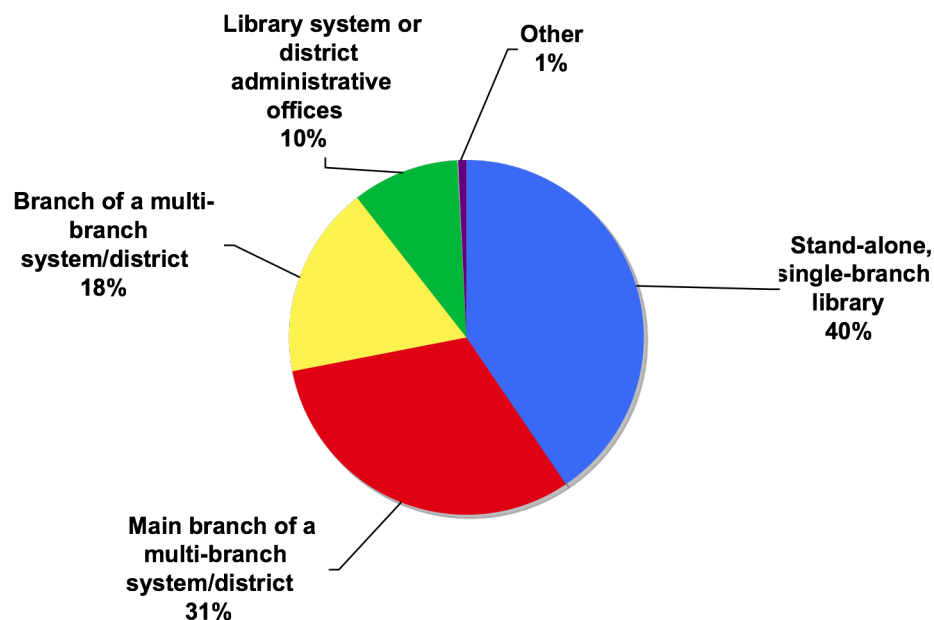
For questions or comments regarding this study, please contact our research manager, Laura Girmscheid by phone (646) 380-0719 or by e-mail at lgirmscheid@mediasourceinc.com.

1. PROFILE OF RESPONDENTS

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,” while 31% described themselves as the “main branch of a multi-branch system or district.” Under one-fifth (18%) were smaller branches of a multi-branch system or district.

Figure 1. Q4: How would you describe your library? —All public libraries



The table below breaks these data down by population served and materials budget.

Table 1. Q4: How would you describe your library? —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	81%	50%	11%	1%	74%	64%	33%	12%
Main branch of a multi-branch system/district	7%	28%	50%	35%	7%	21%	40%	39%
Branch of a multi-branch system/district	12%	17%	19%	25%	17%	13%	15%	21%
Library system or district administrative offices	1%	4%	19%	35%	1%	2%	11%	27%
Other	1%	1%	1%	3%	1%	0%	1%	1%

In small populations, the majority (81%) 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.

Population Served

For libraries serving populations of less than 50,000, our sample is evenly divided among the population breakdowns; 13% serve a population of 25,000–49,999, 14% serve a population of 10,000–24,999, and 13% serve a population of less than 10,000. At the larger end of the population served range, 21% of our sample serves a population of 50,000–99,999, and 22% serves a population of 100,000–249,999. Seventeen percent serve a population of more than 250,000.

Figure 2. Q5: What size is the population served by your library? —All public libraries

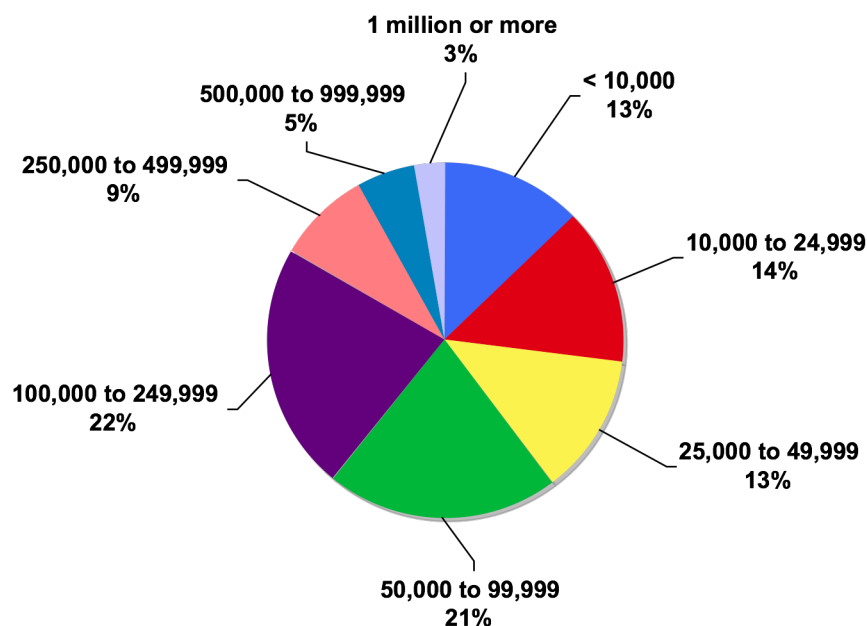


Table 2: Q5: What size is the population served by your library? —Public libraries by materials budget

	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
< 10,000	59%	13%	1%	0%
10,000–24,999	26%	26%	6%	6%
25,000–49,999	9%	29%	18%	7%
50,000–99,999	5%	19%	29%	13%
100,000–249,999	1%	9%	28%	19%
250,000–499,999	0%	3%	13%	21%
500,000–999,999	0%	0%	2%	17%
1 million or more	0%	0%	2%	18%

Materials Budget

The mean materials budget this year (that is, the current fiscal year) for public libraries responding to our survey is \$673,700 (median materials budget is \$248,400). Just over one-third of respondents (34%) reported that their total materials budget for the current year was greater than \$500,000.

Figure 3. Q6: What is your library's total materials budget for the current fiscal year? —All public libraries

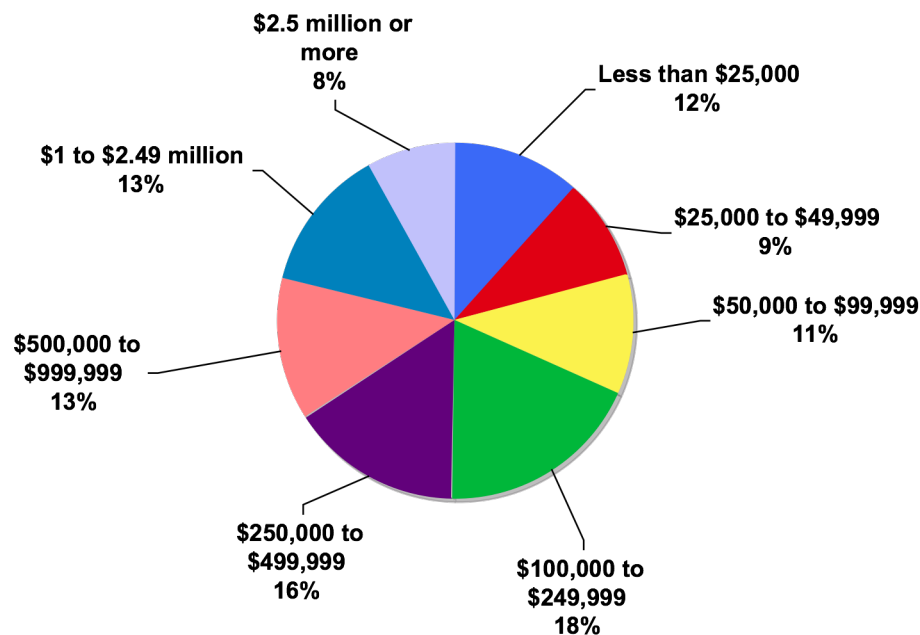


Table 3. Q6: What is your library's total materials budget for the current fiscal year? —Public libraries by population served

	< 25,000	25K–99K	100K–499K	500K+
Less than \$25,000	40%	5%	0%	1%
\$25,000–\$49,999	23%	7%	1%	0%
\$50,000–\$99,999	17%	13%	6%	1%
\$100,000–\$249,999	13%	32%	13%	1%
\$250,000–\$499,999	4%	24%	17%	7%
\$500,000–\$999,999	1%	9%	29%	7%
\$1–\$2.49 million	2%	9%	26%	19%
\$2.5 million or more	1%	2%	8%	64%
Mean (\$ thousands)	120.5	433.6	1,005.9	2,325.2
Median (\$ thousands)	35.9	218.7	725.4	2,718.8

Library Location

Nearly half (48%) of public libraries responding to our survey are located in a suburban area, while 30% are in an urban area, and 27% are in a rural location.

Figure 4. Q2: How would you describe your library's location?
—All public libraries

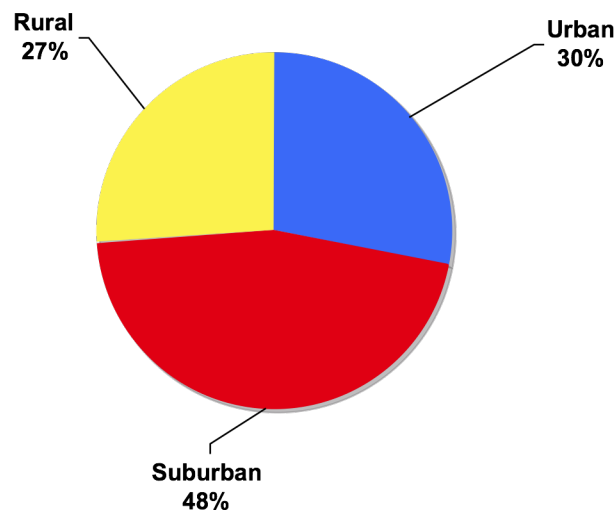


Table 4. Q7: How would you describe your library's location?
—Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Urban	6%	22%	49%	65%	9%	16%	35%	51%
Suburban	29%	59%	51%	44%	19%	52%	58%	54%
Rural	66%	22%	9%	6%	73%	33%	14%	6%

In terms of specific geographical location, we had a fairly even distribution of public libraries in the Midwest, Northeast, West, and South/Southwest.

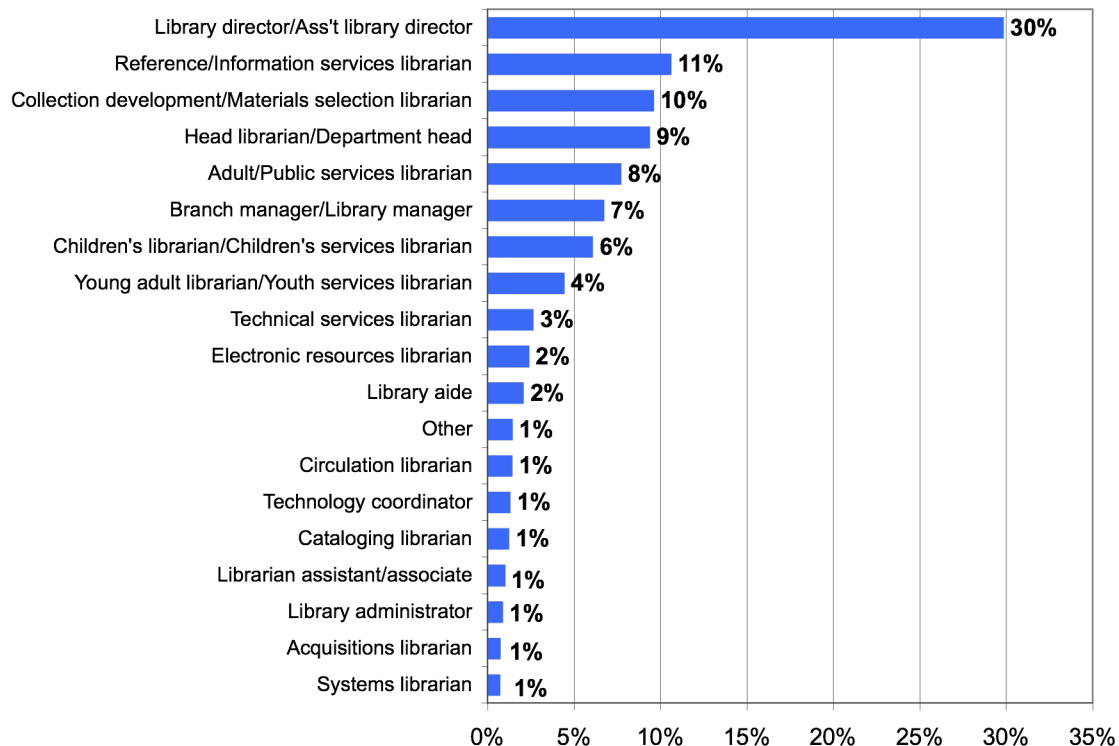
Specific U.S. Geographical Location	% of total	U.S. Geographical Region	% of total
East No. Central	23%	MIDWEST	31%
South Atlantic	15%	NORTHEAST	21%
Mid Atlantic	12%	WEST	19%
Pacific	11%	SOUTH/SW	29%
West So. Central	10%		
Mountain	9%		
New England	8%		
West No. Central	8%		
East So. Central	4%		

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 (30%) were either the library director or assistant library director, while 11% identified themselves as the reference/information services librarian.

Figure 5. Q3: Which of the following comes closest to your job title? —All 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. Q3: Which of the following comes closest to your job title?
—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	59%	26%	17%	6%	59%	40%	25%	6%
Reference/Information services librarian	7%	14%	11%	5%	4%	13%	11%	8%
Collection development/ Materials selection librarian	1%	6%	18%	19%	0%	3%	11%	23%
Head librarian/Department head	6%	11%	8%	19%	4%	7%	14%	14%
Adult/Public services librarian	5%	9%	9%	3%	4%	6%	9%	8%
Branch manager/Library manager	6%	8%	6%	5%	9%	7%	3%	7%
Children's librarian/Children's services librarian	7%	6%	6%	5%	7%	5%	6%	5%
Young adult librarian/ Youth services librarian	4%	5%	4%	5%	2%	6%	5%	4%
Technical services librarian	1%	3%	4%	4%	2%	3%	1%	4%
Electronic resources librarian	0%	1%	4%	13%	0%	0%	3%	8%
Library aide	2%	2%	3%	1%	2%	0%	4%	2%
Circulation librarian	2%	2%	1%	0%	2%	2%	1%	1%
Technology coordinator	1%	1%	1%	1%	1%	2%	1%	2%
Cataloging librarian	1%	1%	2%	1%	1%	1%	1%	2%
Librarian assistant/associate	1%	1%	1%	0%	1%	1%	0%	2%
Library administrator	0%	0%	2%	3%	0%	0%	1%	2%
Acquisitions librarian	0%	1%	1%	3%	0%	1%	1%	1%
Systems librarian	0%	1%	0%	0%	0%	1%	2%	0%
Other	0%	1%	1%	8%	1%	1%	2%	1%

Almost two-thirds of respondents (65%) said that they *are* involved in the ebook purchasing or recommendation process.

Figure 6. Q35: Are you involved in the recommendation/purchasing process of ebooks for your library? —All public libraries

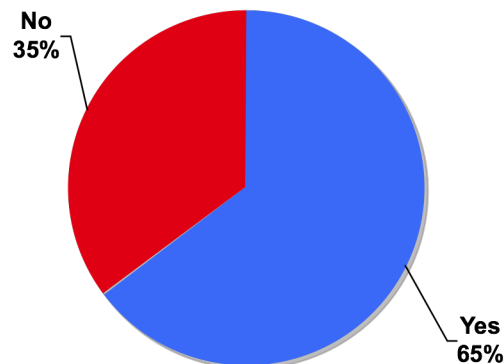


Table 6. Q35: Are you involved in the recommendation/purchasing process of ebooks for your library? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	52%	66%	70%	64%	49%	62%	66%	71%
No	48%	34%	30%	36%	51%	38%	34%	29%

Onward

Our sample of public libraries was evenly distributed throughout all geographical areas, sizes of population, and materials budgets, which will give us a good overall picture of the total ebook experience. The data has been weighted to represent the PLDS breakdown of libraries by population served, similar to last year, allowing us to draw more sound conclusions about emerging trends.

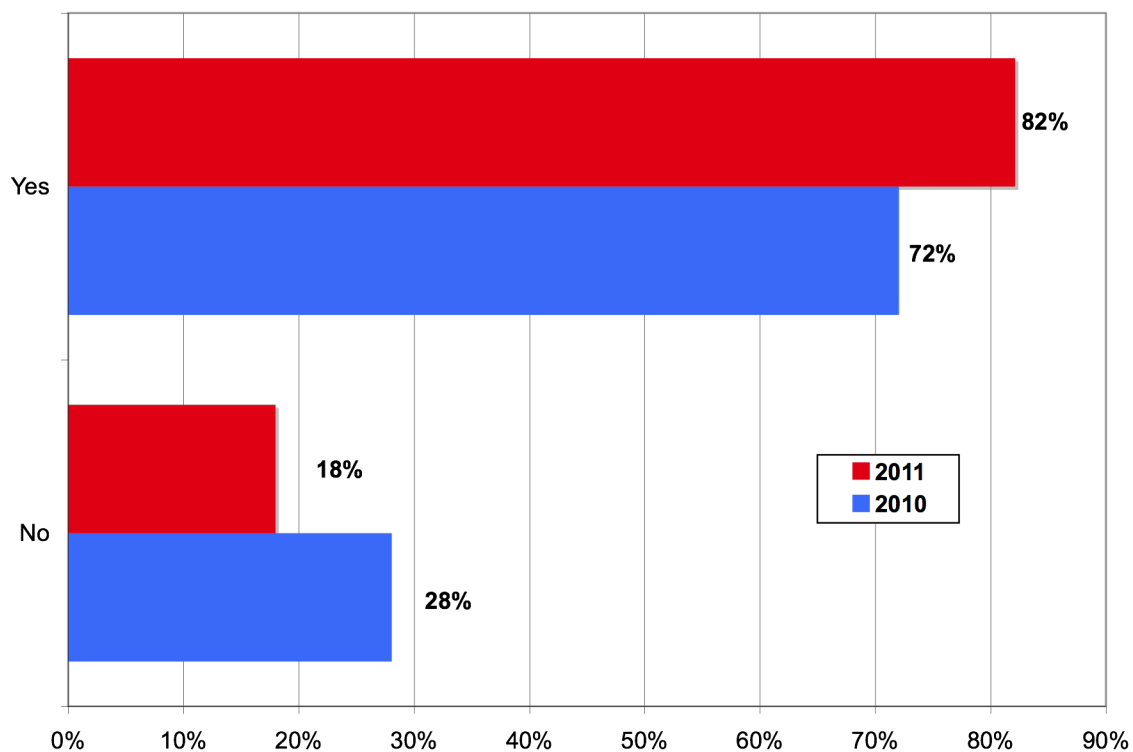
Questions pertaining directly to ebook purchasing habits and vendor preferences (Questions 36 through 46) were answered by respondents who said they are involved in the recommendation/purchasing process of ebooks at their library.

2. EBOOK COLLECTIONS

Offer Ebooks

More than eight out of 10 public libraries (82%) say they currently offer ebooks to users. This is up ten percentage points from last year's survey.

Figure 7. Q7: Does your library currently offer ebooks? —All public libraries



Ebook offerings increase directly as population served increases; 66% of under-25,000 libraries currently offer ebooks, compared to virtually all (99%) of over-500,000 libraries. There is a correlation between ebook offerings and materials budget as well.

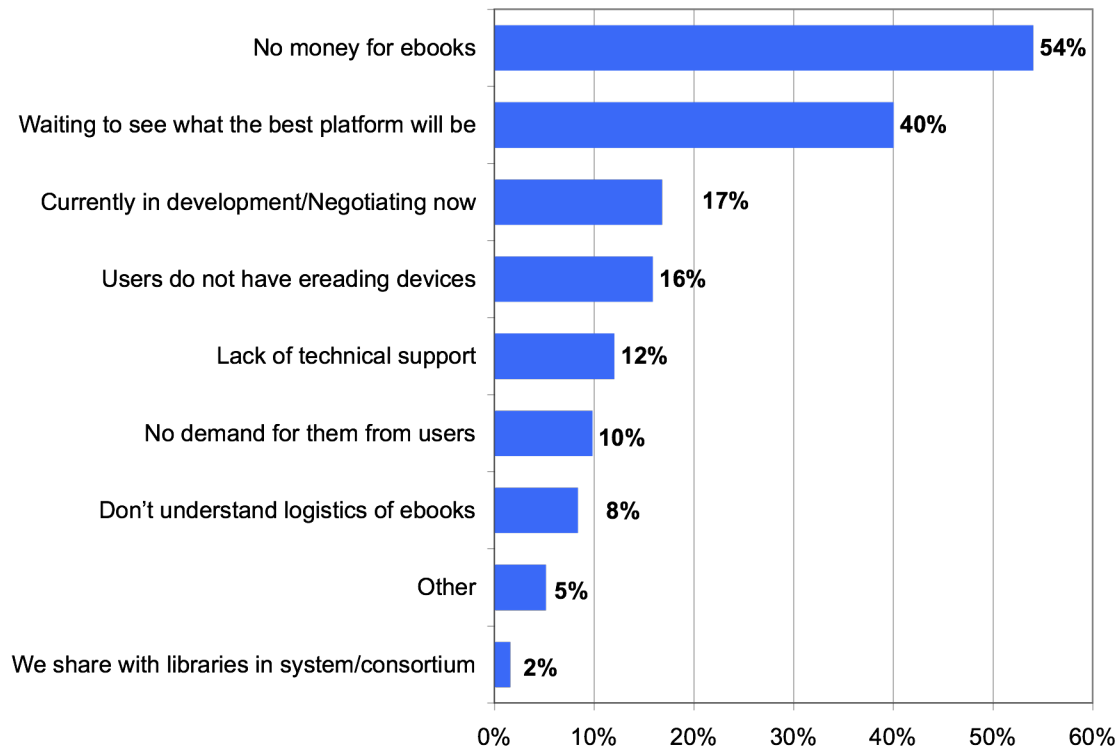
Table 7: Q7: Does your library currently offer ebooks? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Yes	66%	86%	87%	99%	59%	82%	90%	94%
No	34%	14%	13%	1%	41%	18%	10%	6%
2010								
Yes	44%	67%	84%	95%	51%	73%	83%	96%
No	56%	33%	16%	5%	49%	27%	17%	4%

Libraries That Do Not Offer Ebooks

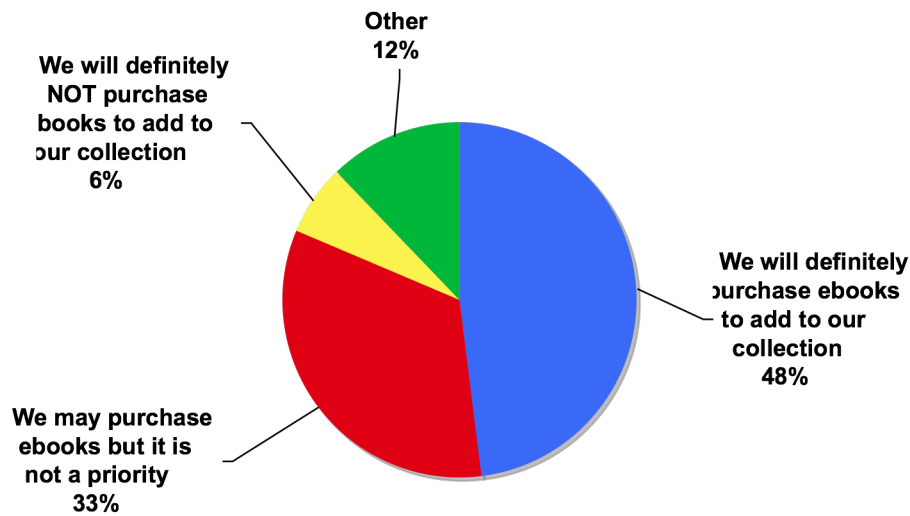
Of the 18% of public libraries that do not offer ebooks, the primary reasons are “no money for ebooks” (selected by 54%) and “waiting to see what the best platform will be” (40%).

Figure 8. Q48: Why doesn't your library offer ebooks? —Public libraries that do not offer ebooks to users



And, of those libraries that do *not* currently offer ebooks, 49% say they *definitely* plan to offer ebooks in the next 12 months, while 33% say they *may* add ebooks, but it's not a high priority. Six percent say they will definitely *not* be adding ebooks to their collections in the next two years.

Figure 9. Q49: What are your library's plans for ebook purchases in the next two years? —Public libraries that do not offer ebooks to users

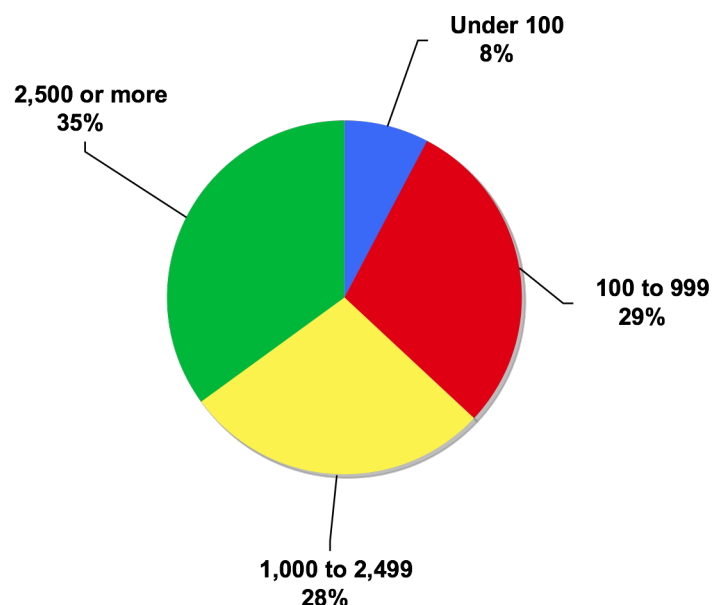


Since the responses to questions 48 and 49 were based on small numbers of respondents (18% of our total sample), cross-tabulations would be unreliable and not projectible.

Number of Ebooks Carried

On average, public libraries that carry ebooks own or subscribe to more than 4,000 ebooks (mean 4,350; median 1,750). Last year, the mean was 1,529 and the median was 813. That is an almost three-fold increase in one year. Many respondents attributed it to a spike in ebook interest by patrons after receiving an ereader as a gift for Christmas 2010.

Figure 10. Q7: How many ebooks does your library currently subscribe to or own? —All public libraries



The number of ebooks owned or licensed increases with both population served and materials budget.

Table 8. Q7: How many ebooks does your library currently subscribe to or own? —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+
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
2010								
Under 100	26%	16%	9%	1%	29%	20%	12%	1%
100 to 999	45%	45%	44%	25%	46%	44%	44%	35%
Over 1,000	29%	39%	47%	74%	25%	36%	44%	65%
Mean	989.9	1,414	1,614	2,484	906	1,209	1,576	2,281
Median	381.4	644	940	2,660	365	469	858	2,332

Increased Demand for Ebooks

A question we added to our 2011 survey asked if public libraries have seen any heightened demand from library users in the past year. And, yes, nearly two-thirds (66%) of respondents said they had experienced a “dramatic” increase in requests for ebooks in the past year. Another 28% said they experienced a “slight” increase. Only 5% reported no change in demand nor any requests for ebooks.

Figure 11. Q8: Has your library experienced an increase in requests for ebooks since this time last year? —All public libraries

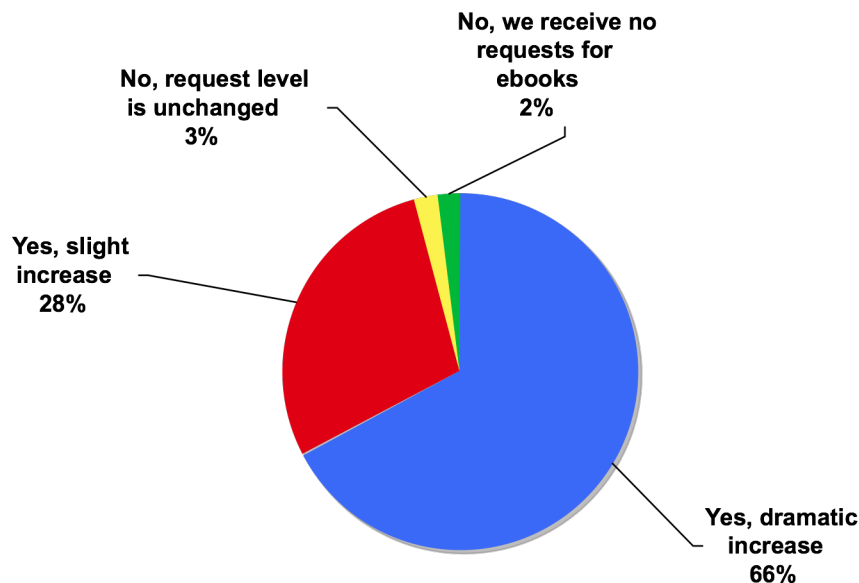


Table 9. Q8: Has your library experienced an increase in requests for ebooks since this time last year? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes, 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 in general to library users. Has the format morass cleared up at all in the past year?

As the chart below shows, the standard ePub format is pulling away from the pack as the preferred format, chosen by 63% of public libraries, up from 44% last year. Formats optimized for specific devices (like the Barnes & Noble Nook) also grew from last year, climbing to 40% of respondents from 35%. (There is some overlap in these choices, as ePub is the format optimized for the iPad's iBook app, for example.) Generic PDF is losing favor, and was only selected by 23% of respondents, down from 42%.

We also note that only 2% selected "Don't know yet, ebooks haven't caught on," plummeting from 23% last year.

Figure 12. Q13: In which format do users generally prefer ebooks? —All public libraries (multiple responses permitted)

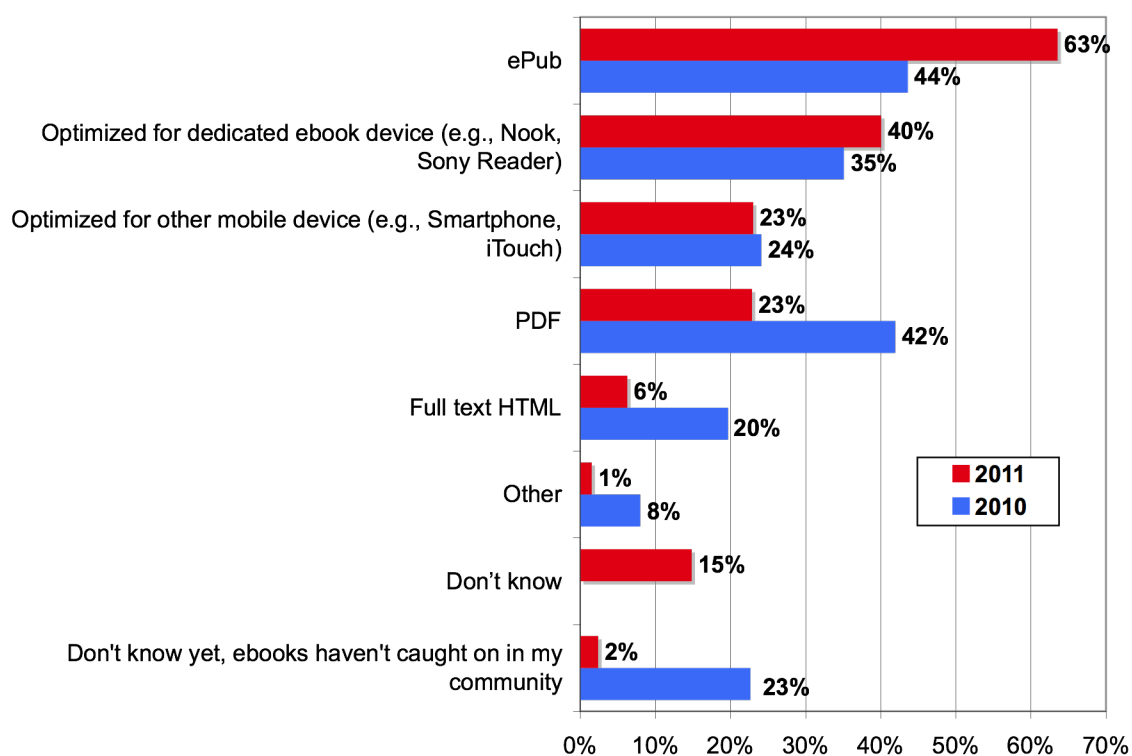


Table 10. Q13: In which format do users generally prefer ebooks? —Public libraries by population served and materials budget

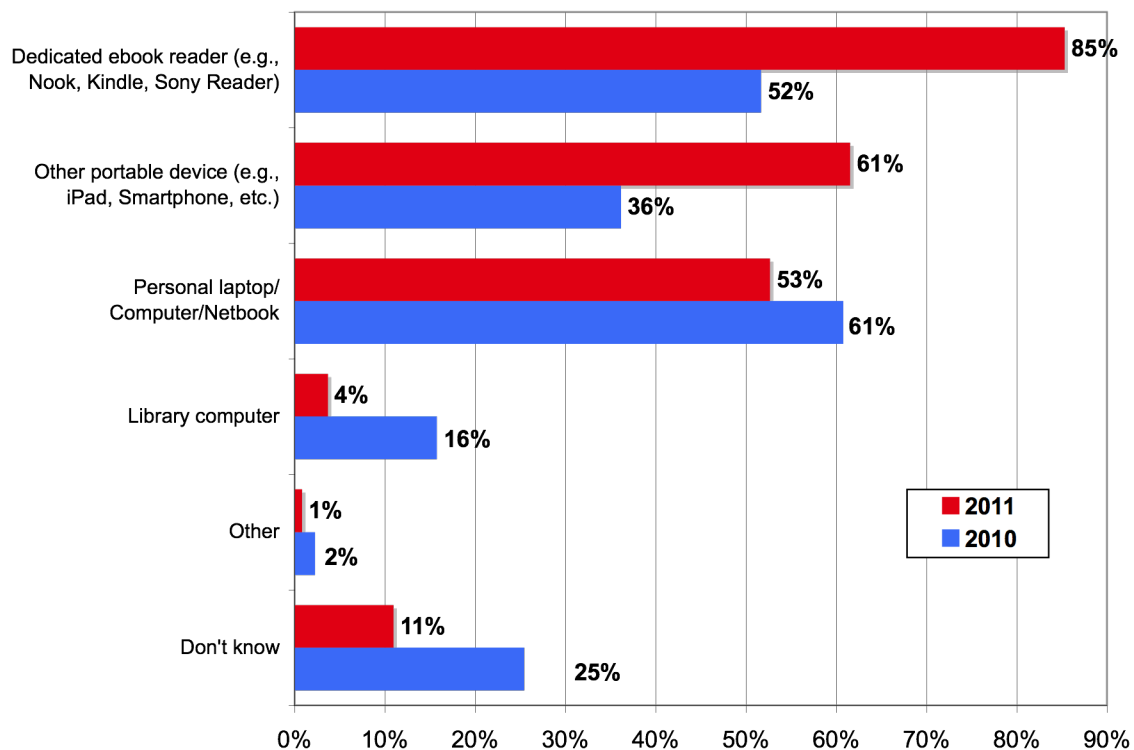
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
ePub	57%	63%	66%	69%	51%	60%	65%	73%
Optimized for dedicated ebook device (e.g., Nook, Sony Reader)	44%	42%	37%	38%	48%	41%	38%	39%
Optimized for other mobile device (e.g., 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%
2010								
ePub	40%	40%	44%	61%	32%	38%	42%	63%
PDF	41%	40%	39%	58%	28%	42%	45%	51%
Optimized for dedicated ebook device	37%	36%	34%	40%	31%	36%	37%	40%
Optimized for other mobile device	16%	24%	25%	36%	14%	20%	25%	35%
Don't know yet, ebooks haven't caught on	24%	27%	20%	7%	35%	26%	18%	11%
Full text HTML	11%	22%	22%	22%	17%	19%	20%	19%
Other	11%	7%	9%	4%	12%	9%	7%	7%

Hardware Devices

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

Dedicated ebook readers are preferred, displacing the personal laptop as the top hardware reading device. A dedicated ebook reader was selected by 85% of public library respondents, up dramatically from 52% last year. (The write-in responses to Question 27—how do respondents feel about the OverDrive/Kindle agreement—provide compelling evidence that the Amazon Kindle is one of the primary dedicated ereaders of choice among library patrons.) Other portable devices, such as an iPad or smartphone also surged from 36% to 61%. Personal laptops dropped from 61% to 53%, and fewer users are using the library's computers to read ebooks (dropping from 16% to 4%).

Those who “don't know” on what hardware devices library users are reading ebooks dropped from 25% to 11%. Both users and library staff are becoming far more knowledgeable about ebooks.

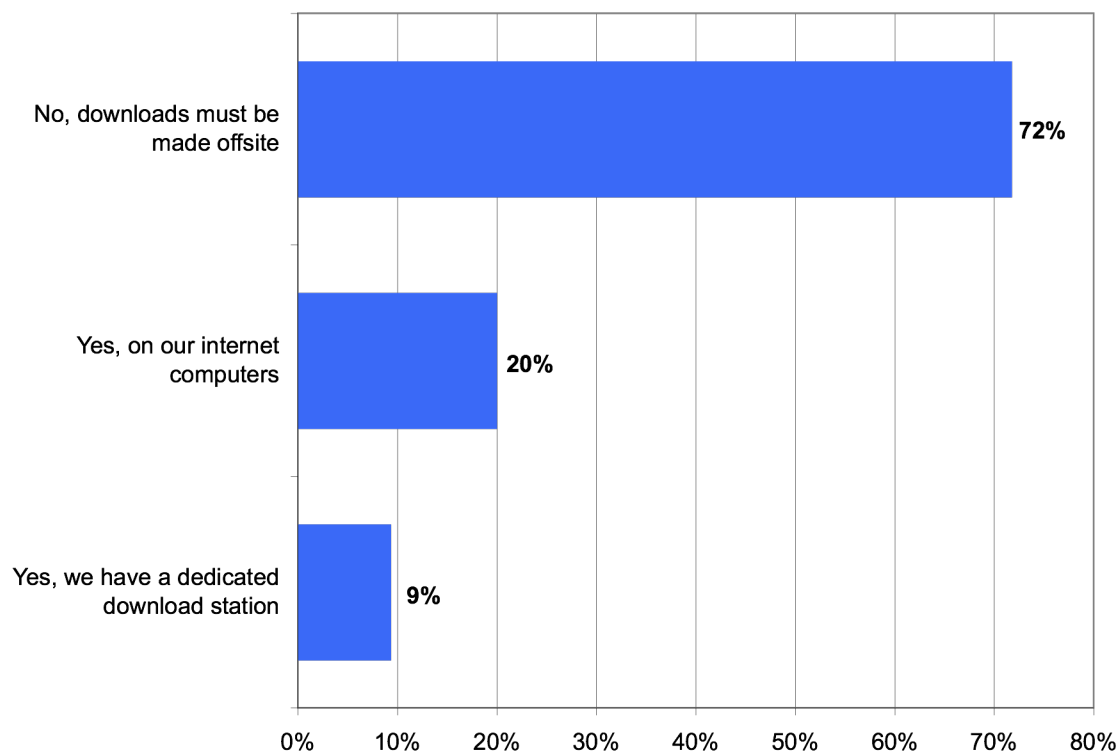
Figure 13. Q21: What device(s) do your library users most often use to read ebooks? —All public libraries (multiple responses permitted)**Table 11. Q21: What device(s) do your library users most often use to read ebooks? —Public libraries by population served and materials budget**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
Personal laptop/Computer/Netbook	44%	58%	67%	78%	48%	51%	69%	68%
Dedicated ebook reader	49%	50%	53%	64%	39%	51%	55%	58%
Other portable device	32%	39%	33%	51%	26%	38%	39%	43%
Library computer	17%	17%	14%	15%	20%	14%	16%	17%
Don't know	30%	28%	22%	18%	35%	28%	20%	23%
Other	1%	3%	3%	0%	2%	3%	3%	1%

Onsite vs. Offsite Ebook Downloading

In a new question, we asked where users are allowed to download the library's ebooks. One-quarter (28%) of respondents allow users to download ebooks on the library's own Internet computers, although only 9% of public libraries have a dedicated ebook download station. In other words, 28% of libraries provide the hardware for the purpose of user ebook downloads. The majority—72%—require that downloads be made offsite. 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.)

Figure 14. Q22: Are users able to download ebooks to their own devices inside your library? —All public libraries



The larger the library, the less likely it is to offer in-library ebook downloading hardware.

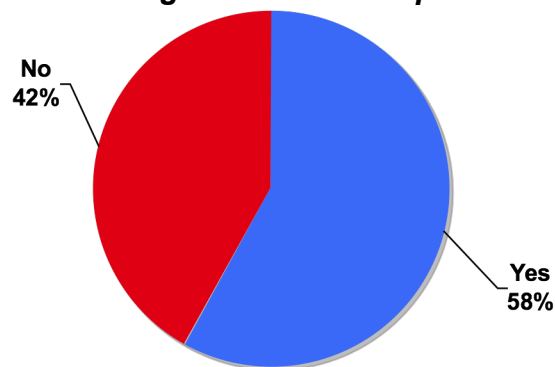
Table 12. Q22: Are users able to download ebooks to their own devices inside your library? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes, 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 Training

Public libraries generally offer training sessions for users to learn how to download ebooks—58% said they did offer these kinds of sessions, while 42% said they did not.

Figure 15. Q23: Has your library offered public training sessions on how to download content to ereading devices? —All public libraries



Larger libraries were the most likely to offer these kinds of training sessions, as they are the ones most likely to have the resources to do so.

Table 13. Q23: Has your library offered public training sessions on how to download content to ereading devices? —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	41%	57%	63%	79%	34%	52%	63%	74%
No	59%	43%	37%	21%	66%	48%	37%	26%

Ebook Categories

Today, ebooks are available in just about every category in which printed books are available, although newer rather than older titles tend to be more readily available. That is, many older or backlist titles have yet to be converted to an ebook format, although a vast collection of public domain titles is available online through providers like Project Gutenberg.

While all ebook categories have grown in the past year—general adult fiction remains the top category of ebooks public libraries offer users, growing from 84% last year to 92% this year. Bestsellers have surged ahead, climbing from 76% of libraries to 90% in the 2011 survey. General adult nonfiction holds steady at 87%, while young adult fiction grows 11 percentage points to 80%. Young adult nonfiction remains unchanged at 46%. Children's picture books are offered by 43%, up from 26% last year. In the 2011 survey, we added graphic novels and it checked in at 26% of all public libraries.

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

- Net Young Adult: 80%, up from 69% last year.
- Net Children: 76%, up from 57% last year.

Figure 16. Q9: Which categories of ebooks does your library currently offer users? —All public libraries (multiple responses permitted)

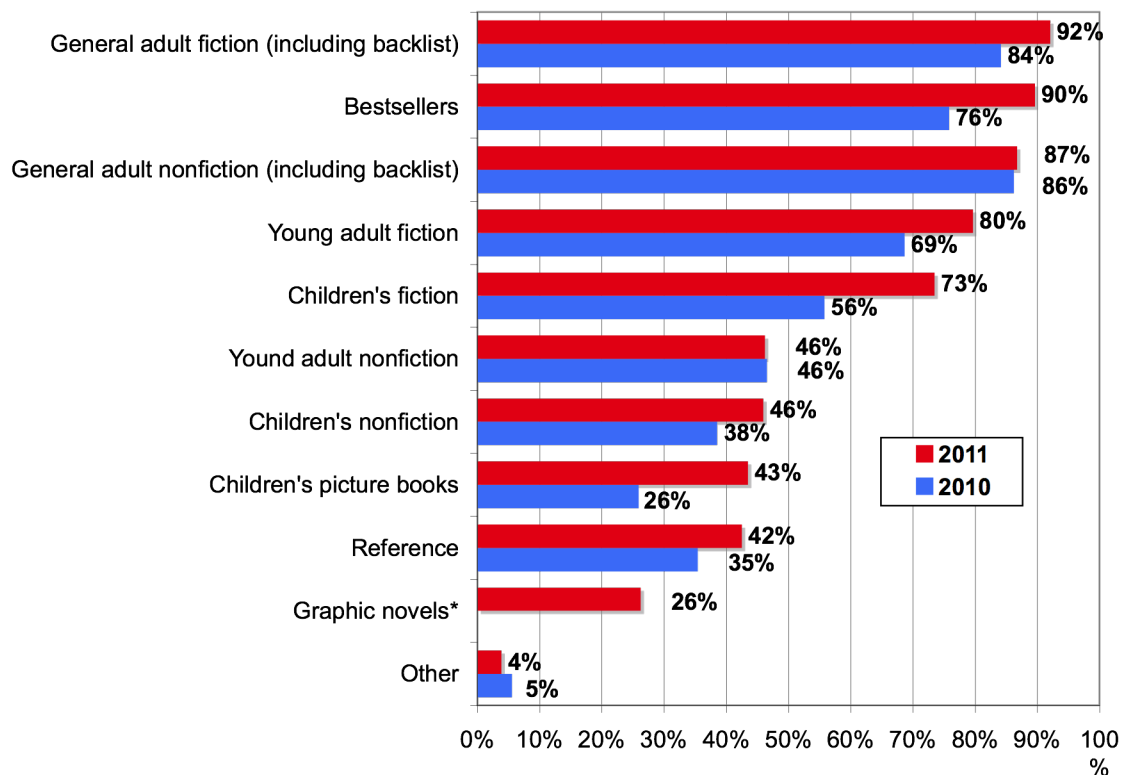


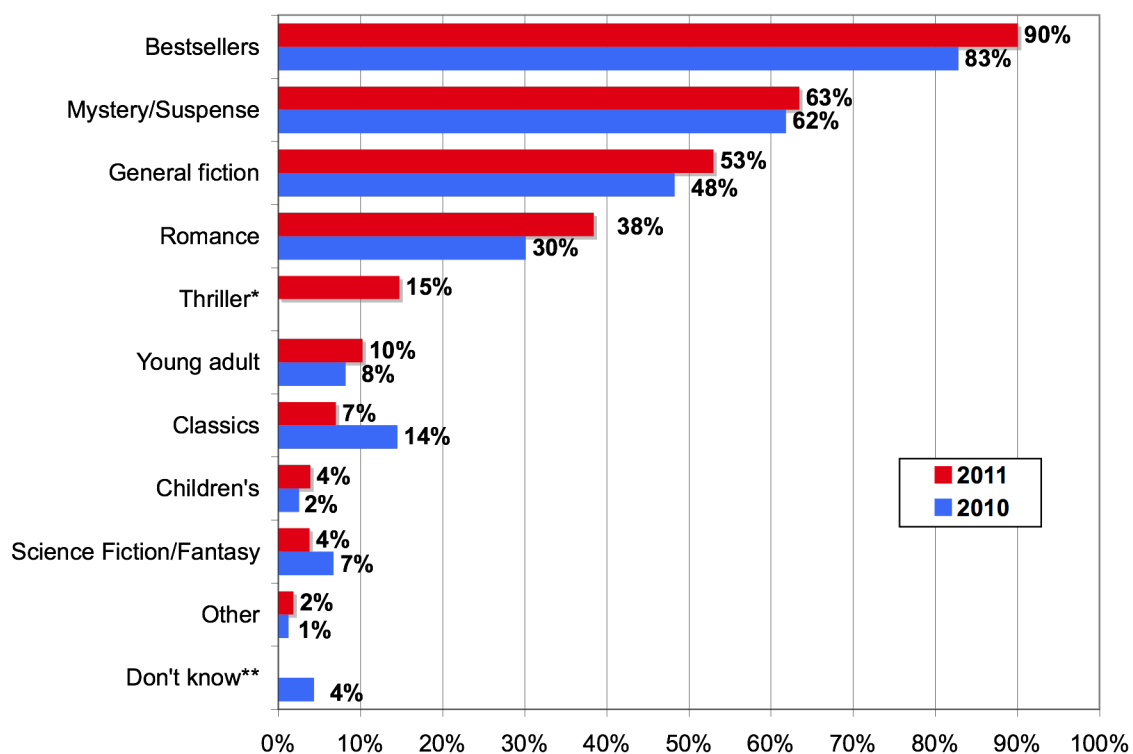
Table 14. Q9: Which categories of ebooks does your library currently offer users? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
General adult fiction (including backlist)	89%	92%	92%	97%	86%	90%	94%	96%
Bestsellers	84%	90%	90%	97%	82%	86%	93%	94%
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%
REFERENCE ONLY	0%	0%	0%	0%	0%	0%	0%	0%
2010								
General adult nonfiction	76%	85%	90%	94%	76%	78%	88%	95%
General adult fiction	84%	85%	82%	91%	76%	82%	84%	93%
Bestsellers	72%	80%	71%	90%	64%	74%	75%	91%
Young adult fiction	62%	66%	70%	87%	56%	64%	69%	80%
Children's fiction	53%	56%	52%	76%	45%	49%	58%	76%
Young adult nonfiction	35%	46%	48%	63%	33%	40%	48%	61%
Children's nonfiction	35%	36%	38%	58%	26%	33%	40%	58%
Reference (non-circulating)	26%	37%	34%	52%	21%	39%	34%	44%
Children's picture books	24%	24%	25%	43%	21%	22%	24%	43%
Other	5%	4%	8%	4%	3%	6%	5%	7%
NET YA	63%	67%	71%	87%	58%	65%	69%	81%
NET CHILDRENS	55%	57%	55%	78%	47%	51%	60%	77%
REFERENCE (NON-CIRCULATING) ONLY	4%	4%	4%	1%	6%	4%	5%	0%

Fiction Categories

Drilling down into fiction ebooks, we asked our public library respondents to select their *top three* circulating or most requested fiction categories. Bestsellers came out on top, as expected, at 90% (up from 83%), followed by mystery/suspense (relatively unchanged at 63%), and general fiction (53%, up from 48%). Classics took a tumble to 7% from 14% last year, and even science-fiction/fantasy ebooks are down a bit. We added “thriller” to the 2011 survey and it checked in at 15% of public library respondents.

Figure 17. Q10: What are your top three circulating or most requested fiction ebook categories? —All public libraries (multiple responses permitted)



*Added to 2011 survey

**Only included in 2010 survey.

Table 15. Q10: What are your top three circulating or most requested fiction ebook categories? —Public libraries by population served and materials budget (multiple responses permitted)

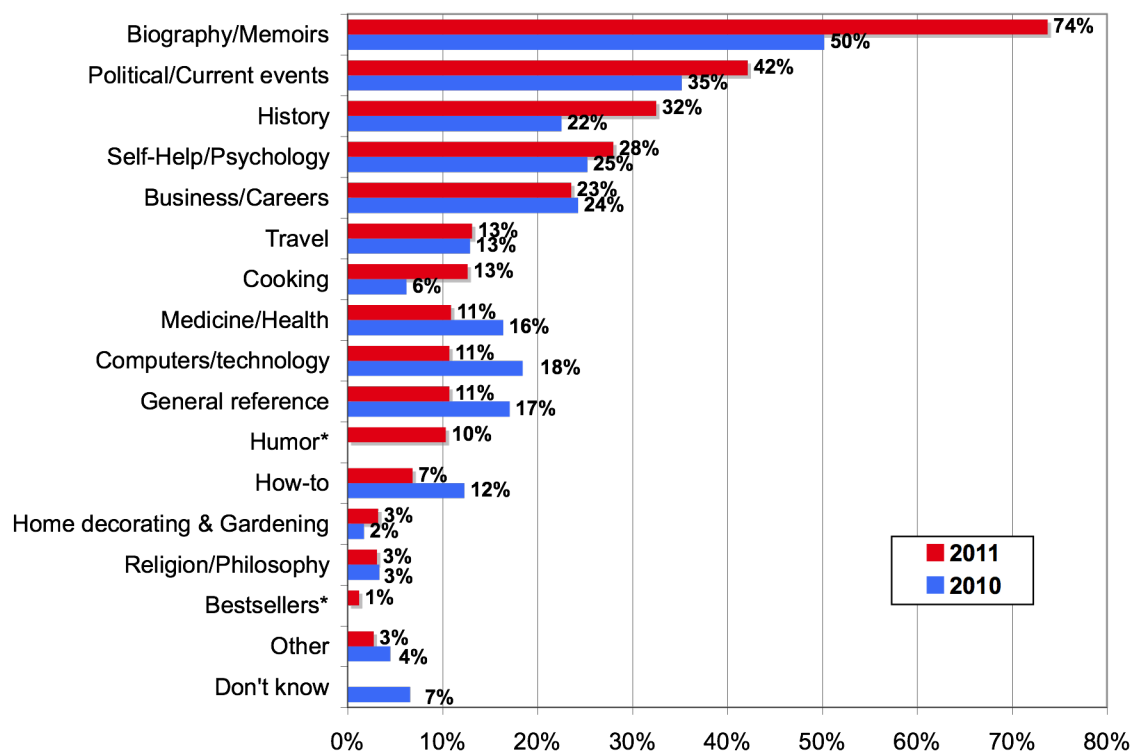
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Bestsellers	89%	90%	90%	88%	89%	87%	92%	91%
Mystery/Suspense	66%	65%	60%	63%	66%	63%	65%	61%
General fiction	51%	57%	52%	44%	47%	57%	54%	52%
Romance	31%	36%	41%	57%	31%	34%	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%
2010								
Bestsellers	76%	89%	79%	90%	73%	83%	89%	86%
Mystery/Suspense	60%	60%	68%	56%	52%	69%	62%	59%
General fiction	45%	48%	50%	44%	43%	47%	50%	45%
Romance	16%	28%	33%	54%	10%	27%	27%	52%
Classics	13%	11%	14%	24%	15%	12%	16%	14%
Young adult	7%	7%	9%	12%	8%	6%	6%	10%
Science fiction/Fantasy	5%	8%	6%	5%	2%	9%	6%	7%
Children's	4%	5%	1%	0%	5%	5%	0%	3%
Other	3%	2%	0%	0%	5%	2%	0%	0%
Don't know	9%	4%	4%	0%	12%	4%	3%	2%

Nonfiction Categories

Likewise, we asked public libraries to choose their *top three* circulating or most requested nonfiction ebook categories.

Biography/memoirs has surged ahead, growing from 50% of public libraries last year to 74% in 2011. Political/current events also grew (from 35% to 42%), as did history (22% to 32%). Medicine/health dropped from 16% to 11%, and computers/technology also dipped from 18% to 11% (perhaps if users can figure out how to download ebooks they are head of the curve and don't need computer books). General reference also took a tumble to 11% from 17% last year. We added "humor" to the 2011 survey and it was a top circulating category for 10% of public libraries.

Figure 18. Q11: What are your top three circulating or most requested nonfiction ebook categories? —All public libraries (multiple responses permitted)



*Added to 2011 survey

In this year's data, we are seeing less and less of a distinction between smaller and larger libraries when it comes to variety of ebook titles offered. The top three highest circulating ebook categories for libraries serving 500,000 or more varies from the other sized libraries; they are biographies/memoirs (65%), business/careers (50%) and self help/psychology (44%).

Table 16. Q11: What are your top three circulating or most requested nonfiction ebook categories? —Public libraries by population served and materials budget (multiple responses permitted)

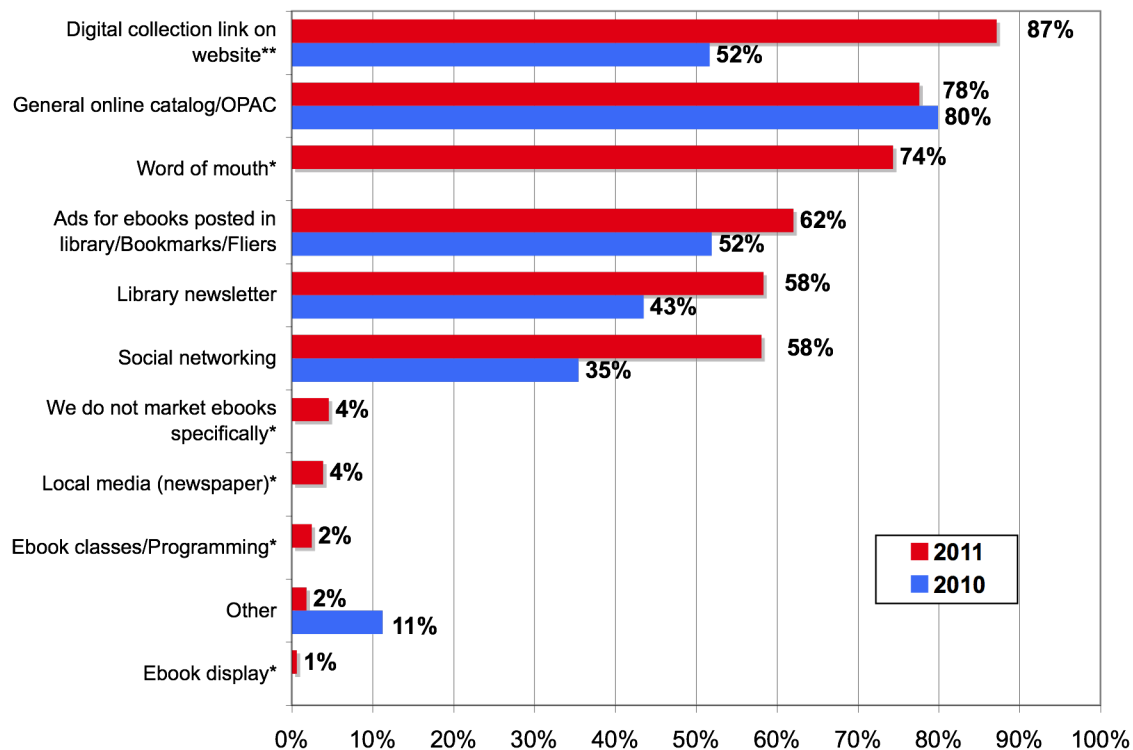
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Biography/Memoirs	77%	74%	73%	65%	76%	77%	72%	71%
Political/Current events	41%	46%	40%	33%	38%	48%	40%	40%
History	31%	33%	38%	24%	29%	36%	32%	31%
Self-Help/Psychology	18%	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	1%	2%	1%	2%	1%	2%	1%	1%
Other	2%	2%	4%	2%	2%	3%	2%	3%
2010								
Biography/Memoirs	45%	50%	53%	50%	52%	43%	53%	52%
Political/Current events	36%	32%	37%	45%	28%	36%	33%	46%
Self-Help/Psychology	26%	26%	22%	29%	21%	32%	22%	22%
Business/Careers	15%	24%	28%	33%	19%	24%	23%	30%
History	27%	21%	25%	14%	26%	26%	22%	18%
Computers/technology	11%	23%	17%	28%	9%	22%	16%	26%
General reference	12%	20%	15%	16%	21%	17%	16%	10%
Medicine/Health	13%	20%	15%	10%	12%	19%	13%	12%
Travel	10%	12%	15%	14%	12%	9%	16%	15%
How-to	16%	9%	13%	10%	16%	11%	12%	12%
Cooking	7%	6%	4%	10%	9%	3%	9%	7%
Religion/Philosophy	2%	1%	5%	3%	2%	2%	6%	1%
Home decorating & Gardening	2%	3%	1%	0%	5%	1%	3%	0%
Other	5%	2%	5%	9%	5%	4%	3%	8%
Don't know	10%	7%	6%	5%	12%	7%	4%	8%

Ebook Marketing

How do public libraries tell their users about ebooks, or advertise which titles are available in ebook format? The top method has become a digital collection link on the library's website, selected by 87% of public library respondents. In the 2010 survey, this item was phrased as "unique ebook catalog on website" and was selected by 52% of respondents. The number two marketing strategy for ebooks is the library's general online/open public access catalog (OPAC), selected by 78%, down slightly from 80%. We added "word of mouth" to this year's survey and it was chosen by 74% of respondents.

All of the marketing and promotion options were up this year from last year, showing that public libraries are actively promoting their ebook collections to users, and turning to a variety of channels to do so. In fact, only 4% said that they do not market their ebook collections.

Figure 19. Q28: How does your library market the availability of ebooks in your library? —All public libraries (multiple responses permitted)



*Added to 2011 survey.

**On 2010 survey, this was phrased as "Unique ebook catalog on website."

Table 17. Q28: How does your library market the availability of ebooks in your library? —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+
2011								
Digital collection link on website	76%	87%	91%	98%	73%	84%	89%	95%
General online catalog/OPAC	70%	78%	80%	83%	61%	72%	85%	87%
Word of mouth	68%	75%	75%	85%	74%	71%	75%	76%
Ads for ebooks posted in library/Bookmarks/Fliers	60%	63%	59%	64%	61%	62%	63%	59%
Library newsletter	50%	60%	58%	66%	41%	57%	64%	65%
Social networking	42%	58%	64%	70%	43%	50%	65%	65%
Local media (newspaper)	2%	3%	6%	0%	2%	5%	3%	2%
Ebook classes/Programming	2%	3%	3%	0%	2%	0%	5%	2%
ebook display	0%	1%	1%	0%	0%	0%	1%	1%
Other	1%	2%	3%	0%	1%	2%	2%	2%
We do not market ebooks specifically	5%	3%	6%	0%	5%	5%	4%	3%
2010								
General online catalog/OPAC	70%	83%	82%	88%	78%	76%	82%	83%
Ads for ebooks posted in library/Bookmarks/Fliers	42%	51%	59%	46%	38%	51%	52%	52%
Unique ebook catalog on website	43%	50%	55%	63%	37%	52%	49%	64%
Library newsletter	39%	49%	45%	30%	34%	46%	44%	40%
Social networking	29%	38%	38%	40%	29%	31%	38%	42%
Other	14%	9%	11%	10%	15%	10%	10%	11%

Top Age Group for Ebooks

The age group that comprises the most active users of public library ebooks is 35 to 54—both the 35-to-44 and 45-to-54 group were cited by 58% of respondents. The latter group (45-to-54-year olds) grew substantially from 42% last year. Likewise, ebook use among 55-and-older users also spiked from 21% to 38%. There were declines in some of the younger age categories as only 11% of ebook “power users” are kids or young adults.

Twenty-one percent of respondents admitted that they had “no idea,” as ebooks are often downloaded by users offsite, not in the library.

Figure 20. Q12: If possible, please identify the age groups you perceive to be the most active ebook users in your library —All public libraries (multiple responses permitted)

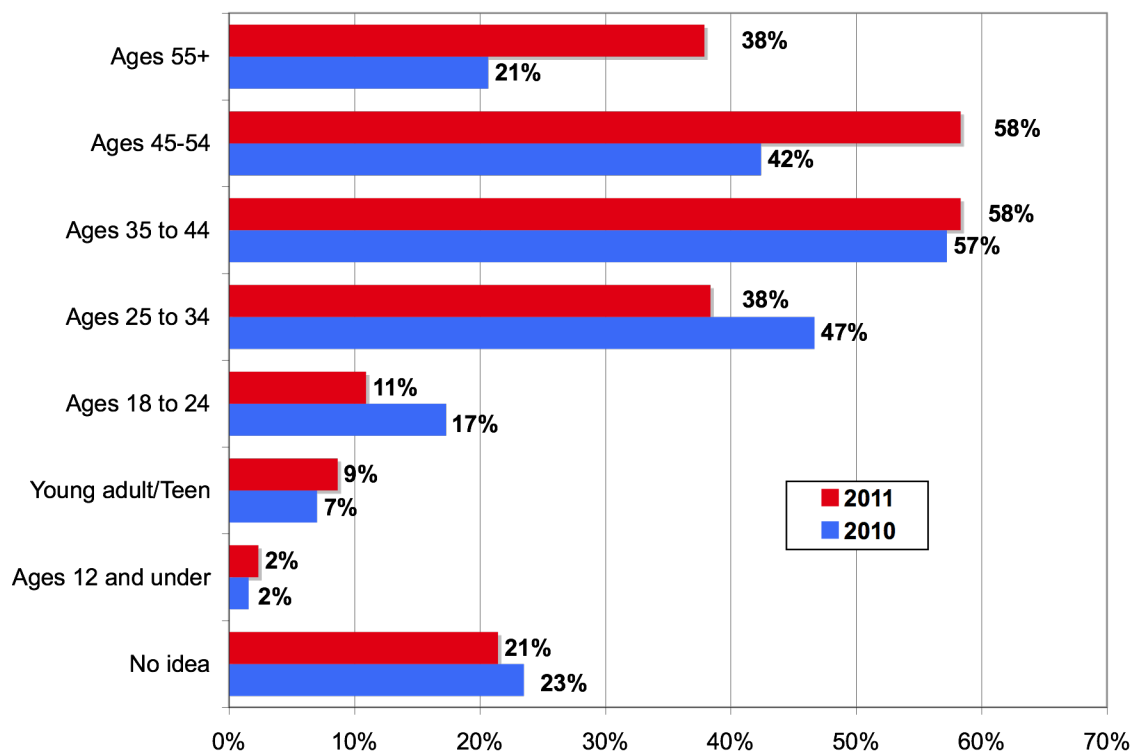


Table 18. Q12: If possible, please identify the age groups you perceive to be the most active ebook users in your library —Public libraries by population served and materials budget (multiple responses permitted)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
Ages 55+	29%	18%	20%	20%	19%	25%	23%	15%
Ages 45-54	38%	43%	46%	46%	31%	43%	47%	45%
Ages 35 to 44	50%	57%	56%	74%	45%	54%	62%	63%
Ages 25 to 34	39%	45%	49%	52%	45%	44%	45%	51%
Ages 18 to 24	11%	16%	22%	11%	18%	18%	17%	12%
Young adult/Teen	7%	5%	8%	7%	8%	7%	5%	6%
Ages 12 and under	2%	2%	2%	0%	0%	3%	1%	1%
No idea	27%	24%	22%	20%	26%	23%	23%	23%

General Conclusions

The tipping point has been reached. Public libraries are actively involved in expanding their ebook collections as much and as quickly as their budgets can afford. In fact, money (or lack thereof) is the biggest barrier to public libraries adding ebooks.

Users have their favorite devices and as a result expect libraries to have a desired title in a format that is compatible with them. When they don't, it imparts a negative perception to a library. As we'll see in Chapter 4, an ebook collection does a tremendous job of attracting new users to the public library; once there, the experience should not be a frustrating one. The new Amazon OverDrive deal²—allowing Kindle users to download library content to their devices—will surely lead to increased demand for ebooks in public libraries. Will libraries be agile enough to meet this increased demand? Time will tell.

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

² Michael Kelley, “Librarians Hope for a ‘Seamless Experience’ With Amazon Kindle,” *Library Journal*, April 22, 2011. http://www.libraryjournal.com/lj/home/890302-264/librarians_hope_for_a_seamless.html.csp

“qualitative” interpretation of the quantitative data presented throughout this report.

- While we do circulate “pre-loaded” eBook readers, those titles preloaded to the devices are public domain titles only.
- A useful, library-friendly, cost-effective e-book model has not yet emerged. Amazon specifically and publishers in general seem disinclined to include public libraries in the development of such a model. Further, if the Kansas experience is any indication, OverDrive isn’t helping.
- Adobe Digital Editions process for Overdrive ebooks is cumbersome for patrons. The smartphone apps however are great. Wish it was that easy for ebook devices like Nook.
- Although our consortium continues to purchase and add ebook titles to our digital collection, there are not enough to keep up with demand and this creates a long wait for patrons.
- As a small rural library we have trouble funding any material acquisitions, let alone a low-demand format like e-books.
- It would be best for all if the ebook formats were available for all the devices that the populace uses.
- As someone who owns an ereader I find it quite difficult to be able to use the library’s resources because they are either never available, compatible, or are difficult to download.
- Because of filtering we are having difficulty with downloading the books. I do feel that it may be harder for the older patrons to understand. The technology is iffy and sometimes it isn’t that easy to download.
- Because of the long holds lists and patron demand we increased our materials budget for ebooks from \$15,000 a year to \$50,000 a year beginning in June and for the rest of 2011.
- Biggest frustration is ease of use and how many patrons we lose due to problems with DRM/Downloading.
- Boopsie integration of ebooks into mobile apps makes download easier.
- Borrowing ebooks from the library is still a complicated process compared with purchasing ebooks directly from the store.
- Contrary to popular news fear-mongering, our circulation evidence shows ebooks and downloadable audiobooks have expanded the library user base. On the whole, circulation of all formats has increased and several new ebook users have said they’ve visited the physical library after first learning of the ebook service.
- Cost of ebooks has been a major factor in our slow movement toward purchasing titles. A second important factor is that our community is slow to adopt new technology. As more people are purchasing ereaders,

demand has grown, but access to new, “hot” titles and a broad variety of genres has lagged in our library system. Cost seems to be a factor in selection by purchasers within the library system.

- Currently, our patrons are only able to download ebooks to their computers, as the formats are not compatible with ereaders at this time. Our librarian is looking into joining a consortium which would make the transfer to ereader devices possible, which I feel would greatly increase ebook use by our patrons.
- Customers who are over 65 years frequently have learning curve needs which staff does not always have time to address. We look for volunteers who can fill this gap.
- Demand is increasing. Biggest barriers to success are related to DRM and publishers policies.
- Demand really surged over the holidays as readers were the “hot” gift. As a result, we were scrambling to meet the dramatically increased demand.
- Demand will grow, but not as fast as other demands put upon library (text and A/V materials, programming).
- Discounted pricing and licensing without restrictions, such as those recently imposed by HarperCollins, would help us build and maintain our collections, and enable us to better meet demand. We will not order titles from publishers that limit the number of uses per title. We are trained professionals capable of weeding our own collections, and refuse to tolerate publisher-imposed weeding, which is what this new practice amounts to.
- Ease of use is one of the biggest issues with ebooks. The initial set up, and registration of the software, and then the check for compatibility is where many patrons get stuck. Once past that point there are a lot fewer problems. Although one reason we have not looked at vendors outside of our OverDrive consortium is the feeling we can not support another method of downloading and transferring. It is hard enough explaining to Mac users that they can only use MP3 titles in downloading audio books and until recently getting books to an iPad to a ridiculous number of steps.
- Ebooks are an important element of our collection, offering a needed option for many readers and listeners. I cannot see them replacing print in the near future.
- E-books are here and libraries should have all media.
- Ebooks are impacting our library in a positive way. They offer another option for access to reading materials. Printed books will still continue to have an audience and their place in the building while ebooks act as a bright light drawing in the new generation of users.
- Ebooks are just a new way of reading. They are gaining in importance for our users and we intend to embrace them.

- Ebooks are my current favorite library service, as a patron myself. I am ONLY reading books as ebooks right now, and digital audios—I am reading them on my iPod touch using OverDrive, checking them out from several public libraries in my region.
- Ebooks evolved in the library. We are a member of a Consortium and subscribe to OverDrive through the consortia. Ebooks were important to larger library members and were added to the selections in Overdrive. I have 3 patrons who have benefited from the addition and expect more usage as awareness of ereaders becomes more mainstream.
- Ebooks have sparked interest in lot of people, but I've noticed a significant amount of frustration in getting started given the confusing and complex steps to access titles. It's hard to help patrons with using e-books when the majority of staff are not trained to use them, and it's not possible to download ebooks in the library—even on staff computers so impossible to walk through process with patrons.
- E-books will only grow in demand as more devices make it easier for patrons to access them.
- Extremely popular, far more users than anticipated, now have to move budget \$ toward ebooks.
- Formats, formats, formats! We are adding formats but not staffing and expertise. The explosion has only increased confusion about formats!
- From a customer services perspective the main problem is the complex nature of the download process for customers. They are having trouble understanding how the process works. We do try in different ways to make this clear for our customers but it does seem to take more steps than what it should.
- High cost and lack of availability is still an issue especially with smaller library systems.
- Hoping for an alternative to OverDrive. Their technical support is atrocious.
- I am excited about the way ebooks are bringing people back to reading that may not want to open a hard copy.
- I am extremely concerned with the current pricing and pricing models for ebooks for libraries. Besides the publishers that will not sell their authors' titles in ebook format to us, the publisher that has instituted a 26 checkout limit on their titles and the publishers/ebook platform providers that have set prices on ebooks substantially higher than print copies, libraries are being blocked from providing our patrons ebooks in a manner that we can manage—financially and effectively. Publishers that won't even sell their titles in ebook format to a public library are not considering the long term impact of their actions on their business and on public library service.

- I do not understand why ebooks cost us 40%–70% more than the print version from the publishers.
- Public libraries have been open to lease plans for popular print titles because of the drop in demand after the first year. Why can't publishers establish a similar lease plan for ebooks? A public library would agree to purchase a set number of ebooks each year for a set price. As part of the agreement, the library would retain a certain number of items or pay a predetermined price to keep more than the agreed number of items. The library would be in control of which items they remove from their collection. I would hope that the price for a lease agreement for ebooks would be comparable to what libraries pay for lease agreements on print books—not the ridiculous price that publishers/ebook platform providers are setting now.
- I am frustrated with OverDrive's business model and am waiting for a different company to come out with an affordable product that takes advantage of the digital format instead of treating it as though it was a print book (single use). Severe budget challenges make it imperative that we spend every penny responsibly.
- I believe that ebooks are becoming more and more important to the residents in our service area, and I think we need to do even more to help people learn how to use them and make the downloading process as easy as it is to purchase ebooks from vendors.
- I love being able to offer them to our customers, but get frustrated with all the steps involved in downloading and transferring to ereaders. I wish more devices allowed the books to be downloaded directly to them, such as with the iPad. Patrons get confused with the process and give up easily. Also, I wish our library system had a collection development plan for purchasing ebooks. It's a mystery how they choose what they purchase, and then they only get a few copies of books that have huge waiting lists. We wouldn't purchase that way for print books, so why are we doing this for ebooks?
- I love ebooks and have many converts. But there are things I don't like. I don't like that publishers like HarperCollins put limits on how many times a library can check out an ebook when libraries already pay more for ebooks than most consumers. Limits are okay if they are large enough for the price. If the limit is going to be 26 checkouts then the price should be lower than \$10 per title. I wouldn't mind paying cover price if check out limits were raised to say 100+ times.
- I spend more and more time showing patrons how to find, place a hold on, and download ebooks. This is exciting for all of us—employees and patrons!
- I think that ebooks won't ever replace regular books, just as books on CD or cassette never did. It's just another format to have on hand for our

patronage. I think we should promote ereadership a lot more. A reader is a reader is a reader!!

- I think that the children's titles are very limited, esp. in the YA area. I think more teens would prefer to read graphic novels in electronic format. I think it would be easier to collect and backfill the titles and offer newer and more selection. As a children's librarian, I don't hear parents asking for ebooks for their kids. I do not know if because the selection is limited or just not a preference
- I would like to have an ebook reader in the Library, but am worried about the cost of it not being returned or damaged.
- I would like to see my library do more promotion of ebooks to the public. I would like to see better training for staff. And we need a larger ebook budget.
- If a library has an unlimited budget, investing money in an ebook collection is a good idea (if, and only if, the library actually owns the content). The library where I work has flat or decreasing budgets, so diverting funds from our physical collection, staff, programs, and services to fund ebooks is a misuse of funds. Our first focus should be on serving the people who come through our doors (and expanding the number of people who do that). Ebooks do not achieve that.
- If I could afford them, I would buy them. We are currently at about 50% of the state-recommended print collection! And the state standards do not consider "e-books" as an appropriate material format in lieu of print. I buy print.
- If we were able to loan ereaders to customers, I think this would make ebooks even more popular. But as it is, the few that our system has, were provided by the State Library, and cannot be loaned out. We have no funding for purchase of these materials at the present time.
- I'm excited to see how popular ebooks have become in the past year. I've done a lot of training and outreach to both the library community and the community we serve. I also run a writers' group, and I've shared with them how ebooks have changed the publishing world. Yes, they can be cumbersome, but overall, I think the future is bright, and I look forward to seeing more developments in the ebook arena.
- In a few days we will begin circulating preloaded ereaders. We received a grant for this project. Each ereader is a mini-library and is theme-based, for example, mysteries, favorite fiction, spare time, teen, children's.
- It is amazing how quickly we have been "guided" by our patrons to embrace ebooks.
- It is true that seniors and older adults are the higher users of e-books. The younger group is not as book-oriented. They prefer interactive programs. However, we think this will change dramatically as the price of the

hardware falls within range of disposable items that parents can buy for children or teens.

- We have a huge demand for bestsellers which are not available. And it is not cost effective for a library to buy limited rights to an e-book that can only be read a limited number of times compared to a book that can be circled 50 plus times when well bound and something that belongs to the library permanently.
- It is very encouraging to see patrons of various age groups utilizing this format. My only hope is that our county library system can keep up with the demand!
- It's brought people back to the library.
- It's difficult to answer specific expenditures and circulation numbers because ebooks are also "reference." They may not have circulations, but they do have number of uses. The amount we spend seems high, but I'm including all reference ebooks.
- It's difficult to decide to take funds away from print books to buy ebooks. May try to add a ebook budget but times are not good for increases like that. Thank goodness for the consortium!
- It's necessary for us to aggressively pursue offering this service if we wish to remain relevant to our users.
- Libraries and librarians must work together with publishers and vendors to come up with an ebook/library use model that works for everyone's benefit.
- Look forward to improvement, simplification of download process. Patrons are often frustrated and so are we, trying to help them.
- Lower use of print materials since ebooks have been available
- More people are signing up to use ebooks every day. It was a "tough sell" at first and many still just want print editions, but it is gradually becoming more accepted and people are starting to come in and ask about it.

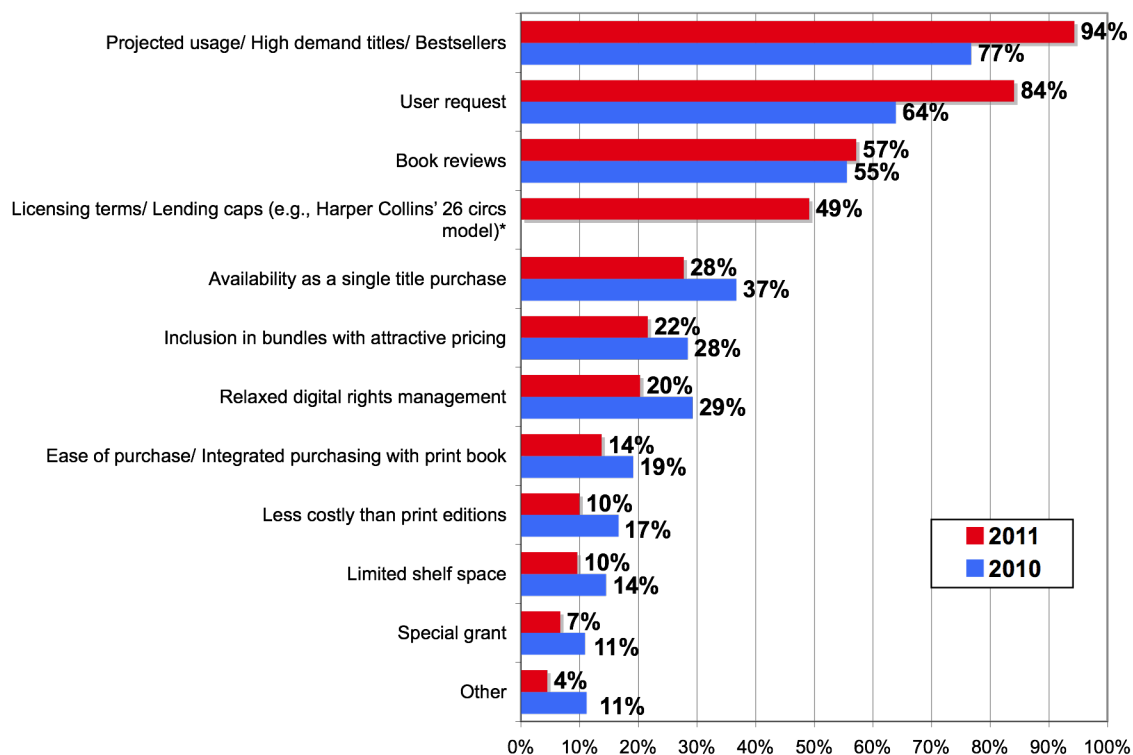
3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

Acquisition

The top two factors that influence libraries' decision to purchase an ebook for its collection are projected usage and user requests, and both are increasing dramatically, according to our public library respondents. "Projected usage/high demand titles" was selected by 94% of respondents—up from 77% last year. "User request" likewise was up to 84% from 64% a year ago. "Book reviews" are relatively unchanged at 57%. Every other factor has declined, especially "availability as a single title purchase" and "relaxed digital rights management," both down nine percentage points.

User demand is fueling libraries' ebook purchase decisions and the logistics and licensing issues are becoming slightly less thorny, and/or libraries are learning how to best deal with them. The write-in comments from our respondents presented at the ends of Chapters 2, 3, and 4 suggest a mix of both of these is true.

Figure 21. Q36: What factors influence your decision to purchase ebooks for your library? —All public libraries (multiple responses permitted)



*Added to 2011 survey.

The top responses are fairly consistent across all library and budget sizes. “Limited shelf space” was higher among small libraries (22%). Large libraries were more likely to choose “usage statistics/projected usage” (97%) and “user request” (80%). “Ease of purchase” was higher among libraries with a small materials budget.

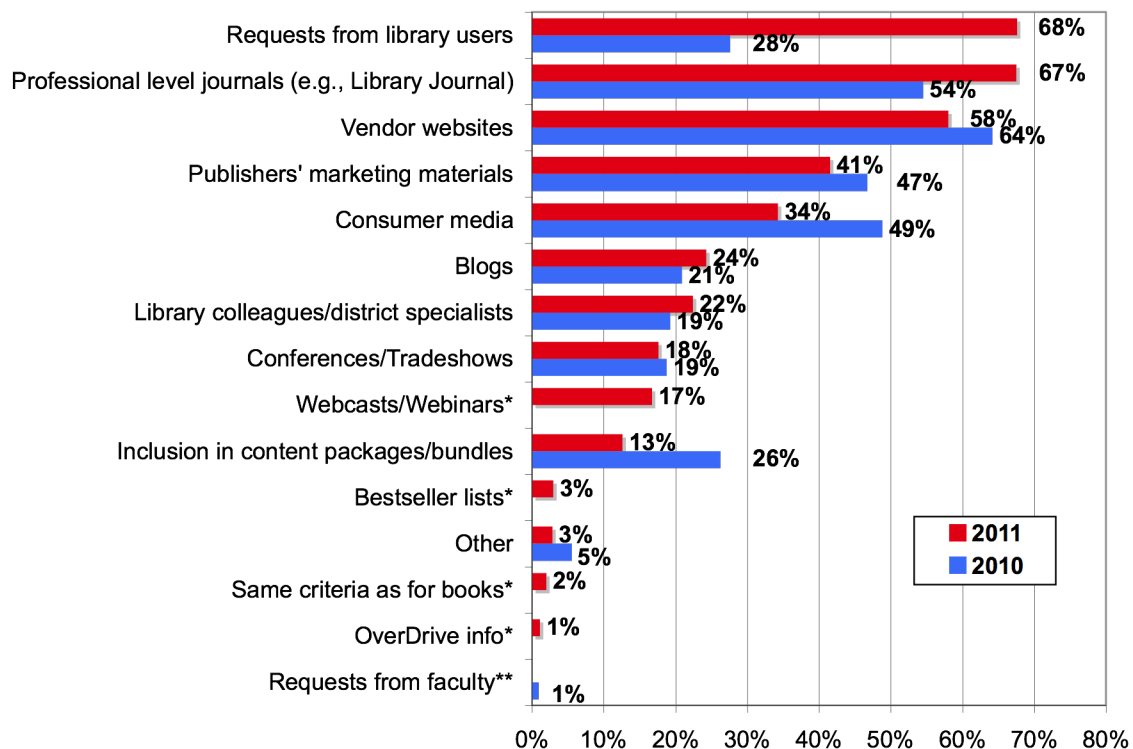
Table 19. Q36: What factors influence your decision to purchase ebooks for your library? —Public libraries by population served and materials budget (multiple responses permitted)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
Usage statistics/Projected usage	76%	67%	81%	97%	75%	68%	81%	89%
User request	60%	71%	59%	80%	79%	55%	65%	75%
Book reviews	51%	61%	53%	67%	50%	57%	54%	57%
Availability as a single title purchase	25%	33%	38%	63%	29%	35%	29%	51%
Relaxed DRM that allows printing or downloading	18%	32%	31%	37%	13%	32%	28%	36%
Inclusion in bundles with attractive pricing	20%	30%	28%	33%	33%	27%	26%	28%
Ease of purchase Integrated purchasing with print book	13%	20%	20%	20%	25%	13%	22%	19%
Less costly than print editions	18%	17%	16%	17%	13%	22%	15%	15%
Limited shelf space	22%	8%	16%	13%	21%	11%	18%	13%
Special grant	9%	12%	12%	10%	21%	11%	13%	6%
Other	5%	8%	14%	23%	8%	9%	10%	19%

Learn About Ebooks

Vendor websites are becoming less important as a means by which librarians learn about new ebook titles. Last year, it topped this list; now, it has dropped to number three, falling from 64% to 58% of respondents. The new number one is “requests from library users” which mushroomed from 28% to 68% of all respondents. (In last year’s survey, it was phrased as “requests from students/users.”) “Professional level journals” also increased from 54% to 67%. “Consumer media” (phrased as “general interest media” in last year’s survey) was selected by only 34%, down from 49%.

Figure 22. Q39: How do you generally find and learn about ebooks? —All public libraries (multiple responses permitted)



*Added to 2011 survey.

**Included in 2010 survey only.

Large libraries are much more likely than small libraries to get ebook suggestions from users (79% vs. 48%); larger libraries are also more apt to rely on vendor websites (88%).

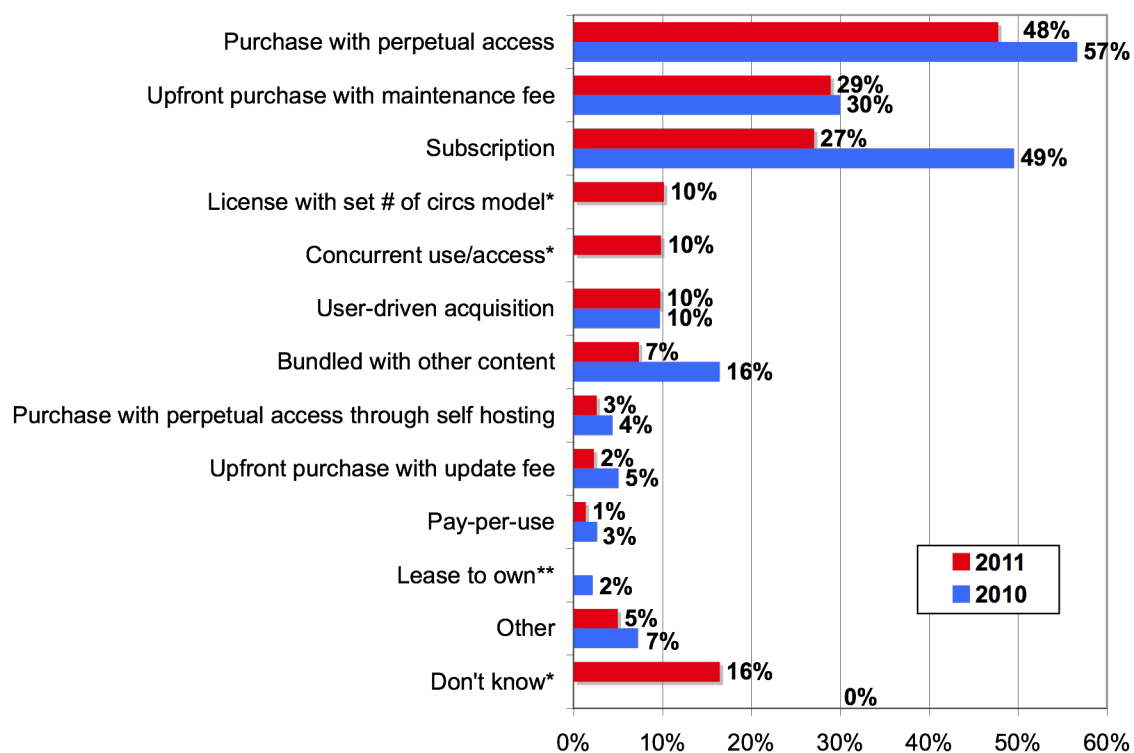
Table 20. Q39: How do you generally find and learn about ebooks? —Public libraries by population served and materials budget (multiple responses permitted)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Requests from library users	48%	66%	75%	79%	49%	59%	70%	78%
Professional level journals (e.g., Library Journal)	64%	68%	68%	70%	69%	64%	65%	71%
Vendor websites	52%	54%	60%	88%	45%	53%	63%	70%
Publishers' marketing materials	35%	42%	42%	64%	39%	41%	37%	52%
Consumer media	23%	30%	43%	45%	24%	29%	34%	44%
Blogs	20%	22%	25%	36%	27%	16%	19%	36%
Library colleagues/district specialists	21%	21%	23%	30%	27%	20%	20%	23%
Conferences/Tradeshows	13%	22%	13%	39%	21%	13%	18%	28%
Webcasts/Webinars	14%	19%	12%	36%	21%	14%	13%	26%
Inclusion in content packages/bundles	10%	10%	15%	15%	12%	10%	13%	13%
Bestseller lists	0%	1%	6%	0%	1%	1%	4%	2%
Same criteria as for books	0%	1%	4%	0%	0%	1%	1%	3%
OverDrive info	3%	2%	0%	0%	3%	3%	0%	0%
Other	4%	1%	2%	9%	1%	4%	0%	6%
2010								
Vendor websites	54%	59%	69%	73%	50%	60%	66%	72%
Professional level journals (book reviews/mentions)	50%	60%	53%	57%	50%	56%	59%	47%
General interest news & journals (book reviews/mentions)	41%	53%	46%	53%	42%	48%	49%	47%
Publishers' marketing material	33%	51%	50%	47%	46%	42%	49%	45%
Requests from students/users	35%	28%	26%	27%	42%	27%	21%	34%
Inclusion in content packages/bundles	17%	29%	26%	30%	21%	25%	25%	28%
Blogs	19%	23%	18%	33%	21%	19%	20%	28%
Library colleagues/district specialists	20%	23%	16%	17%	38%	20%	13%	19%
Conferences/Tradeshows	15%	19%	18%	30%	13%	19%	21%	21%
Requests from faculty	2%	1%	0%	0%	4%	0%	1%	0%
Other	6%	7%	4%	13%	13%	4%	4%	11%

Ebook Purchasing Terms

When libraries purchase ebooks, more often than not they purchase them with “perpetual access,” though the percent who do is down a bit from last year. Twenty-nine percent (essentially unchanged from last year) pay an upfront cost with a maintenance fee. Subscriptions are much less widespread—subscribers dropped from 49% of respondents to 27%. In this year’s survey, we added two items—“license with set number of circulations model” and “concurrent use/access”—both of which were selected by 10% of respondents. Interesting—far more respondents said they “don’t know” this year (16%) than last year (0%), reflecting public libraries’ uncertainty about the impact of new licensing schemes (HarperCollins, etc.).

Figure 23. Q38: What type of purchasing terms does your library typically use when acquiring ebooks? —All public libraries (multiple responses permitted)



*Added to survey in 2011.

**Included on 2010 survey only.

Larger libraries with more resources use multiple purchasing terms when acquiring ebooks – almost three-quarters (74%) use more than one acquisition method, the most popular being “purchase with perpetual access,” “license with a set number of circulations” and “upfront purchase with a maintenance fee.” Only about a quarter (27%) of libraries serving populations under 25,000 use multiple purchasing terms.

Table 21. Q38: 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+
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%
2010								
Purchase with perpetual access	50%	58%	54%	71%	45%	59%	54%	61%
Subscription	43%	61%	43%	64%	41%	53%	49%	55%
Upfront purchase with maintenance fee	22%	29%	32%	50%	18%	25%	31%	47%
Bundled with other content	7%	10%	24%	25%	18%	9%	13%	27%
User-driven acquisition	7%	7%	13%	14%	9%	8%	10%	12%
Upfront purchase with update fee	0%	7%	3%	18%	5%	5%	2%	12%
Purchase with perpetual access through self hosting	4%	3%	3%	11%	0%	5%	7%	4%
Pay-per-use	4%	0%	2%	7%	5%	2%	0%	6%
Lease to own	0%	2%	3%	4%	0%	5%	0%	2%
Other	9%	8%	8%	0%	14%	9%	3%	6%

Fair and Realistic Licensing Model

Last year, we found that one of the biggest complaints libraries of all kinds had about ebooks involved licensing models. So a question we added to the 2011 survey asked public library respondents what they felt would be a “fair and realistic” ebook licensing model. The highest ranked response was “unlimited circulation using one reader/one book model” selected by 59%. A close second (chosen by 54%) was “maximum access” allowing simultaneous access to multiple users. Not surprisingly, a “lending cap model” like the recent HarperCollins cap at 26 circs ranked very low (6%).

Figure 24. Q37: What do you feel would be a fair and realistic model for licensing ebooks? —All public libraries

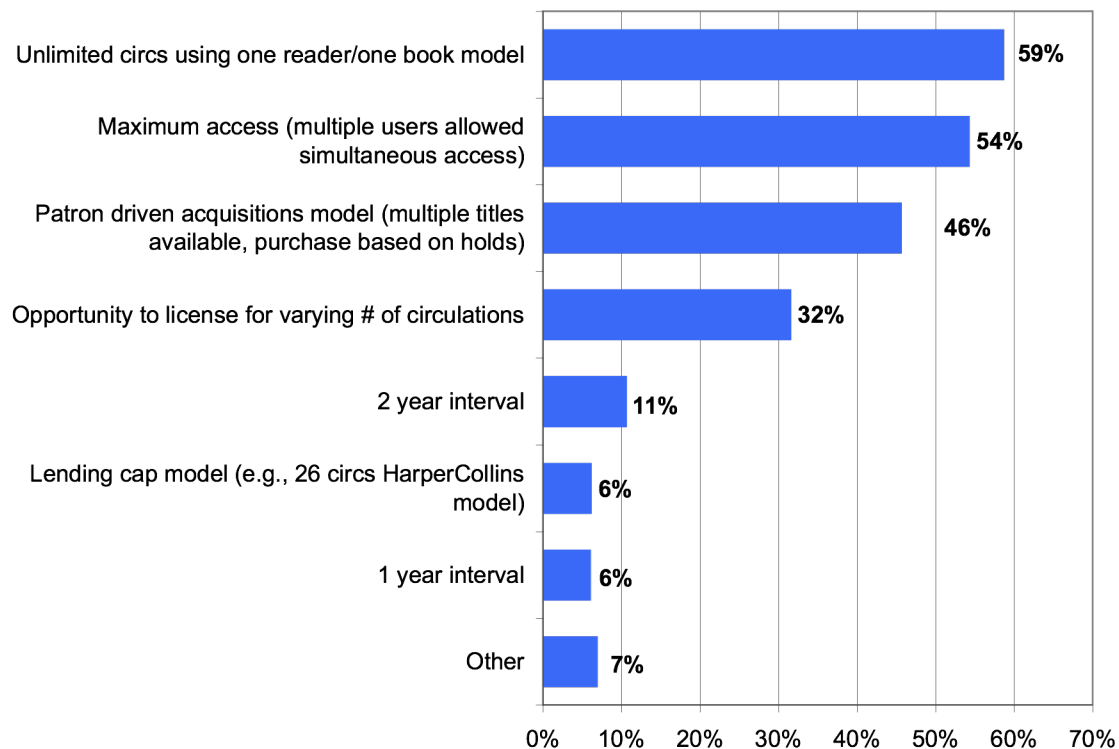


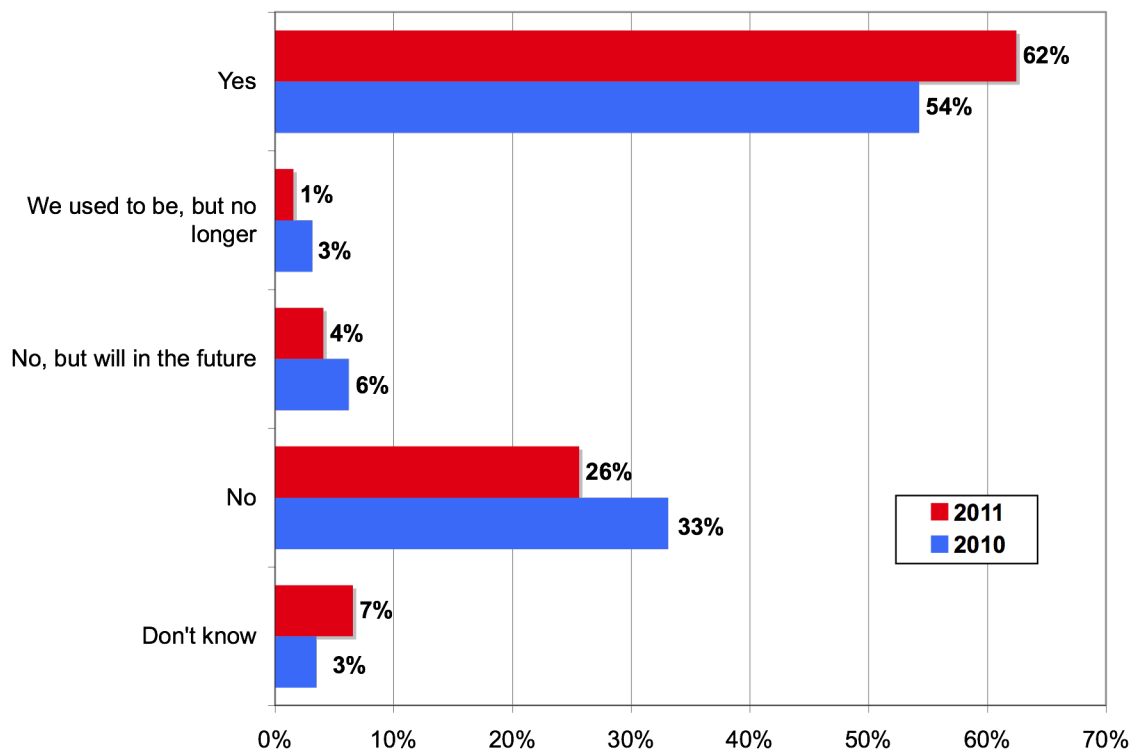
Table 22. Q37: What do you feel would be a fair and realistic model for licensing ebooks? —Public libraries by population served and materials budget (multiple responses permitted)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Unlimited circls using one reader/one book model	59%	54%	63%	68%	57%	60%	58%	61%
Maximum access (multiple users allowed simultaneous access)	49%	57%	52%	65%	41%	58%	53%	60%
Opportunity to license for varying # of circulations	29%	30%	29%	56%	21%	31%	30%	44%
Patron driven acquisitions model (multiple titles available, purchase based on holds)	44%	47%	45%	47%	43%	44%	48%	48%
2 year interval	8%	10%	8%	26%	4%	10%	12%	14%
Lending cap model (e.g., 26 circls HarperCollins model)	5%	5%	7%	24%	6%	4%	4%	15%
1 year interval	6%	8%	2%	21%	3%	5%	7%	11%
Other	4%	10%	6%	6%	10%	7%	6%	5%

Consortium Program

Almost two-thirds (62%, up from 54% last year) of public libraries are part of a consortium license program for ebooks, while 26% are not. Four percent plan to join a consortium (down from 6%), while 1% (down from 3%) used to belong but don't any longer.

Figure 25. Q33: Is your library part of a consortium license program for its ebook collection? —All public libraries



Consortium membership has grown in the last year, especially among smaller libraries (membership up from 69% to 83% in the last year).

Table 23. Q33: Is your library part of a consortium license program for its ebook collection? —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+
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%
2010								
Yes	69%	76%	37%	30%	54%	68%	55%	36%
We used to be, but no longer	0%	4%	3%	10%	0%	4%	1%	8%
No, but will in the future	5%	4%	8%	0%	4%	6%	6%	4%
No	18%	13%	51%	57%	33%	17%	37%	51%
Don't know	7%	3%	1%	3%	8%	5%	1%	2%

Buy Books Independently

In our 2011 survey, we added a follow-up question to see if libraries that are consortia members also buy ebooks independently. It turns out that 37% of libraries that are part of a consortium licensing program also purchase ebooks on their own.

Figure 26. Q34: If yes, does your library also buy ebooks independently? —Public libraries that are part of a consortium licensing program

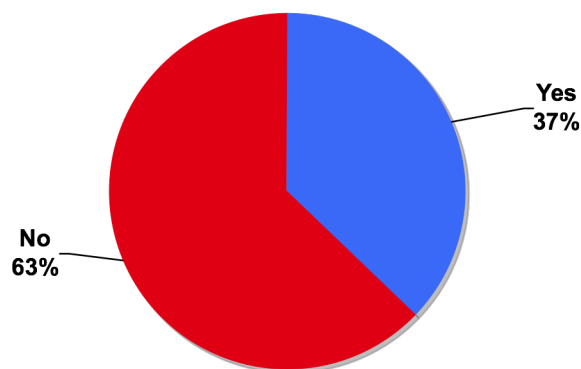


Table 24. Q34: If yes, does your library also buy ebooks independently? — Public libraries that are part of a consortium licensing program, by population served and materials budget

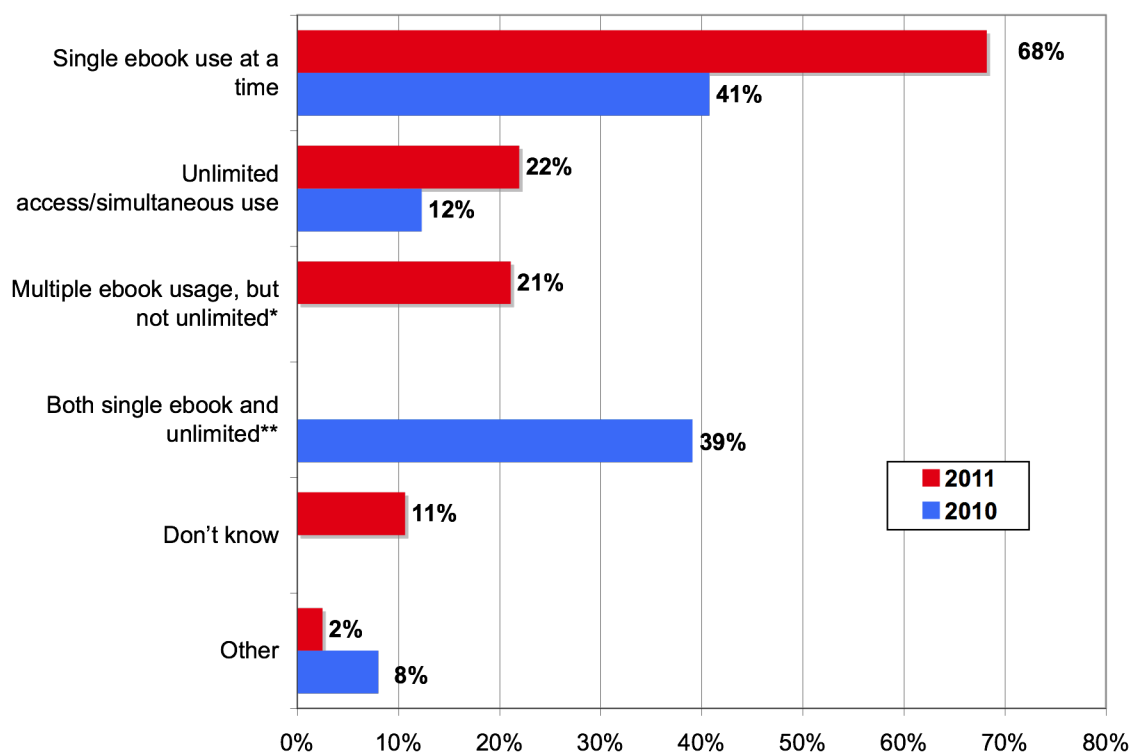
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	23%	37%	48%	50%	22%	25%	43%	65%
No	77%	63%	52%	50%	78%	75%	57%	35%

Ebook Usage License

In terms of usage licensing (which is often dictated by the publisher), 68% of public libraries say they license single ebook usage at a time, much like lending a printed book. This is up substantially from 41% last year. Twenty-two percent (up from 12%) allow unlimited or simultaneous use of an ebook title.

In our 2011 survey, we added the item “multiple ebook usage, but not unlimited,” which was selected by 21% of public library respondents. We also asked a follow-up question to determine, if they allow multiple access, how many ebooks they license at a time, and we found a mean of 8.0.

Figure 27. Q14: What ebook usage license model is currently employed at your library? —All public libraries



*Added to 2011 survey.

**Only included in 2010 survey.

Table 25. Q14: What ebook usage license model is currently employed at your library? —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+
2011								
Single ebook use at a time	63%	69%	72%	73%	59%	69%	74%	68%
Multiple ebook usage, but not unlimited	20%	20%	21%	24%	22%	18%	22%	24%
If multiple, how many at a time? (mean)	6.0	8.4	7.4	17.2	5.9	7.6	8.0	10.5
Unlimited access/simultaneous use	15%	22%	24%	32%	14%	18%	23%	32%
Other	4%	2%	2%	0%	3%	3%	0%	4%
Don't know	13%	9%	10%	12%	14%	11%	6%	12%
2010								
Single ebook use at a time	46%	33%	45%	39%	45%	39%	44%	33%
Unlimited access/simultaneous use	7%	15%	14%	9%	11%	13%	13%	13%
Both	34%	43%	36%	48%	27%	39%	37%	49%
Other	14%	8%	5%	4%	17%	9%	6%	5%

Customer Holds

As with other types of circulating materials, libraries generally let customers place holds on downloadable ebooks when the license doesn't allow simultaneous use. This trend has increased substantially—91% of public libraries now allow holds on ebooks, up from 78% last year. One percent “sometimes” allows holds. As some of the write-in comments at the end of Chapters 3, 4, and 5 point out, explaining to library users why they can't access a digital file immediately can be a disheartening challenge.

Figure 28. Q16: Do you allow library customers to place holds on downloadable ebooks? —All public libraries

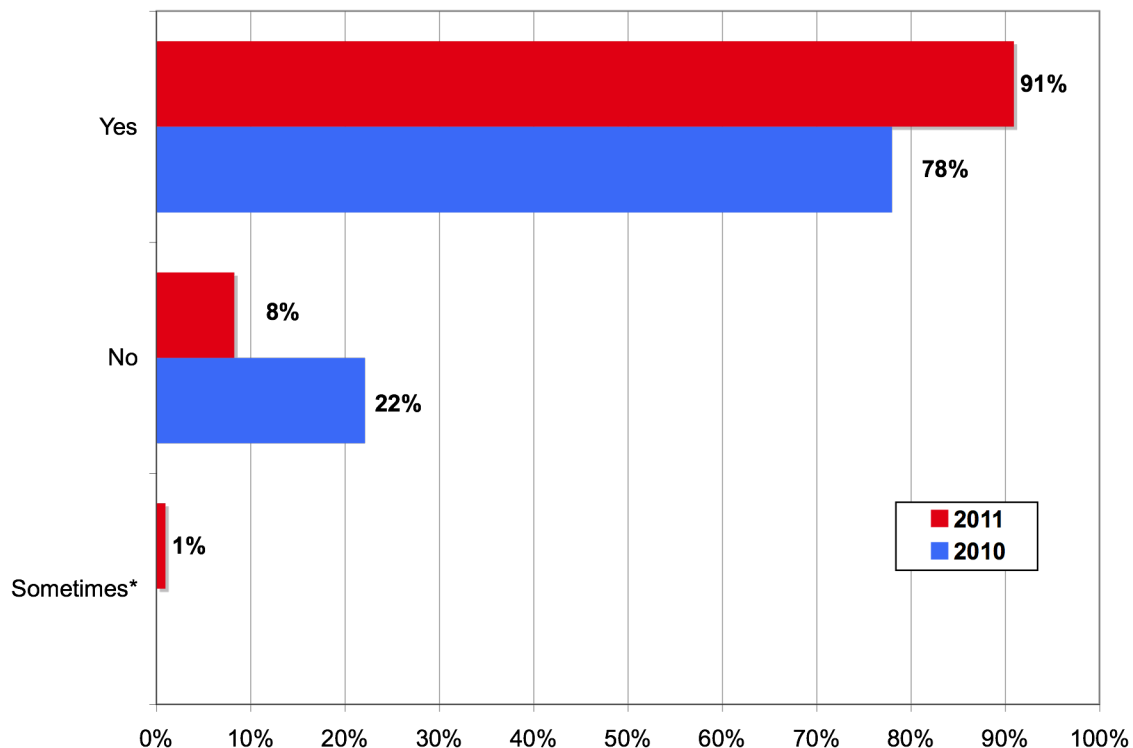


Table 26. Q16: Do you allow library customers to place holds on downloadable ebooks? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Yes	91%	91%	89%	97%	89%	89%	93%	94%
No	8%	8%	11%	2%	10%	9%	6%	5%
Sometimes	1%	1%	0%	2%	1%	1%	1%	1%
2010								
Yes	78%	80%	75%	91%	77%	72%	80%	88%
No	22%	20%	25%	9%	23%	28%	20%	12%

In our 2011 survey, we added a follow-up question to see if libraries ever purchase additional digital copies to fulfill ebook holds. Just about two-thirds (65%) of public libraries do buy extra digital copies to fulfill holds.

Figure 29. Q17: If yes, do you ever purchase extra digital copies to fulfill ebook holds? —Public libraries who allow library users to place holds on ebooks

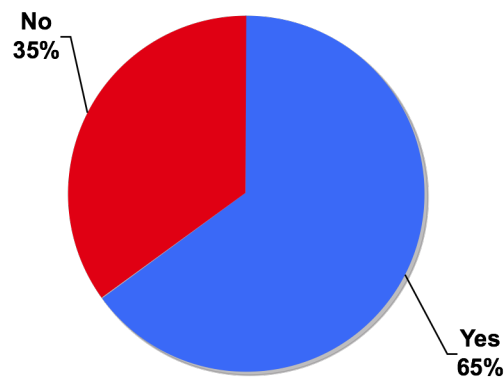


Table 27. Q17: If yes, do you ever purchase extra digital copies to fulfill ebook holds? —Public libraries who allow library users to place holds on ebooks, by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	47%	65%	70%	82%	36%	61%	67%	79%
No	53%	35%	30%	18%	64%	39%	33%	21%

Another follow-up question added to our 2011 survey asked if public libraries have a set holds-to-copy ratio. Public libraries are split nearly 50-50 on having a set holds-to-copies ratio: 52% do while 48% do not. Of those who do, the average holds-to-copies ratio is 6:1.

Figure 30. Q18: If yes, Do you have a set hold-to-copy ratio for ebooks? — Public libraries who allow library users to place holds on ebooks

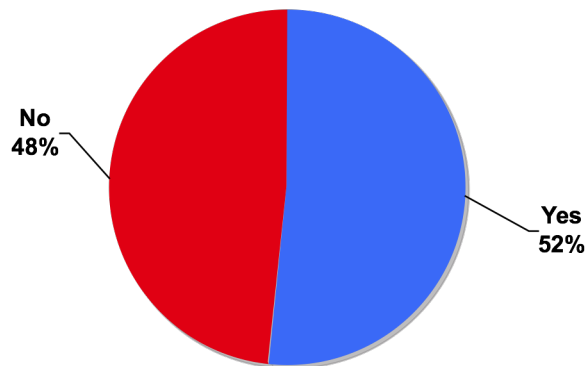


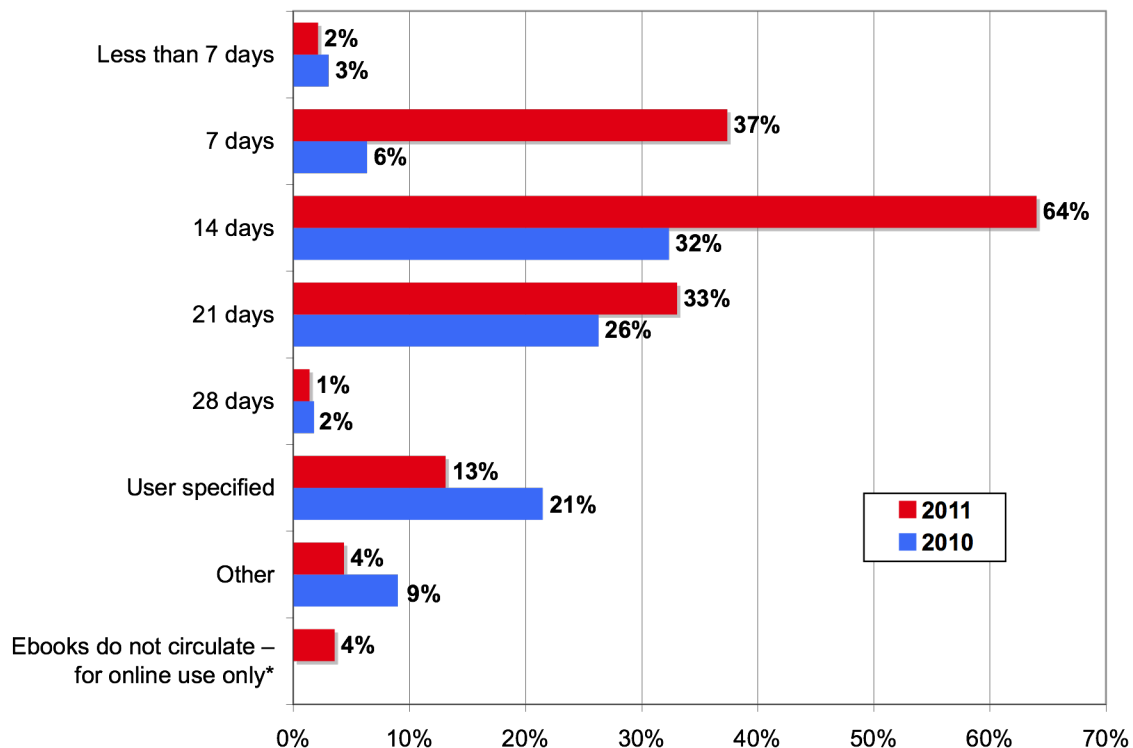
Table 28. Q18: If yes, Do you have a set hold-to-copy ratio for ebooks? — Public libraries who allow library users to place holds on ebooks, by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	42%	47%	54%	69%	39%	42%	51%	65%
Mean holds-to-copy ratio	7:1	6:1	6:1	6:1	7:1	6:1	6:1	6:1
No	58%	53%	46%	31%	61%	58%	49%	35%

Circulation Interval

In the past year, ebook circulation intervals have been getting shorter, likely in response to increased demand. One to two weeks is now, on average, the circulation interval for ebooks in public libraries, with two-thirds of respondents citing 14 days (doubling from 32% last year), and 37% citing 7 days (up dramatically from 6% last year). One-third of respondents cite 21 days. User-specified circulation is falling out of favor, dropping from 21% to 13%.

Figure 31. Q15: What is the circulation interval for ebooks at your library? —All public libraries



*Added to 2011 survey.

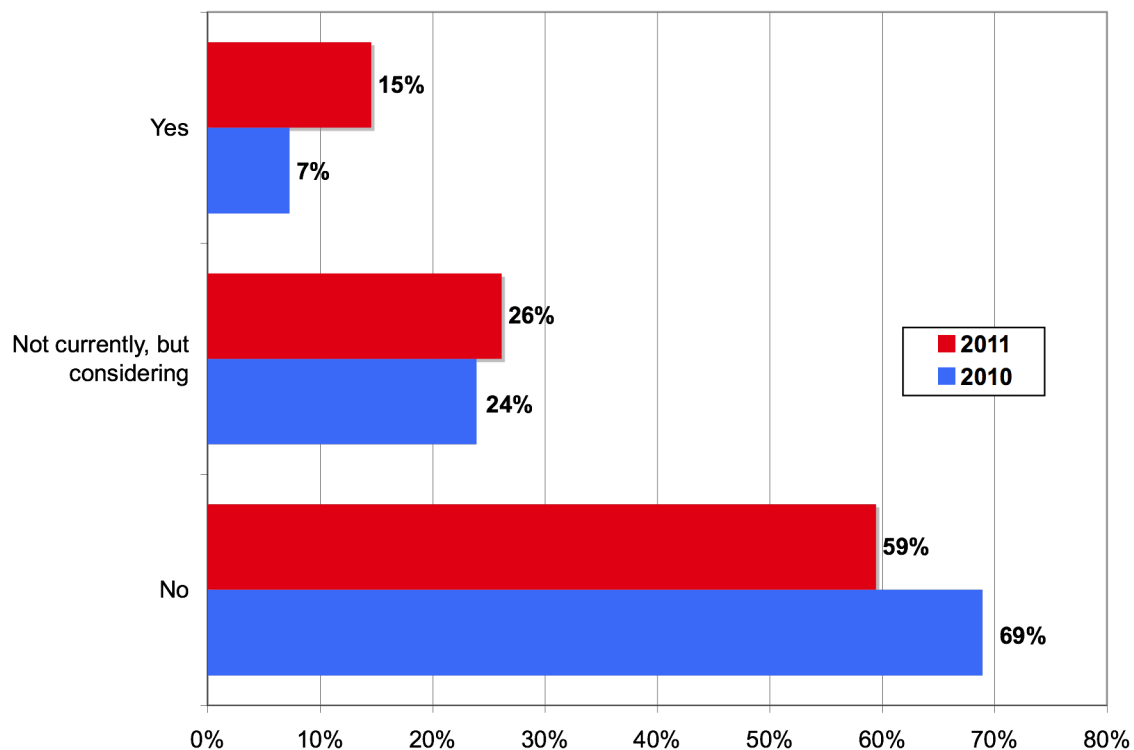
Smaller libraries are more likely to have a shorter circulation interval for ebooks, possibly a way to mitigate scarcity and better meet user demand.

Table 29. Q15: What is the circulation interval for ebooks at your library? — 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+
2011								
Less than 7 days	0%	2%	3%	2%	0%	2%	2%	3%
7 days	36%	33%	40%	47%	34%	35%	37%	42%
14 days	66%	65%	62%	52%	66%	64%	67%	55%
21 days	25%	29%	37%	59%	21%	27%	33%	48%
28 days	2%	0%	2%	3%	2%	1%	1%	2%
User specified	8%	13%	16%	17%	7%	11%	15%	17%
Other	5%	5%	4%	6%	3%	6%	2%	7%
Ebooks do not circulate – for online use only	3%	3%	4%	3%	3%	3%	4%	2%
2010								
Less than 7 days	3%	3%	4%	0%	2%	5%	1%	2%
7 days	11%	8%	5%	3%	14%	8%	3%	5%
14 days	46%	35%	28%	15%	44%	39%	34%	15%
21 days	25%	23%	29%	32%	29%	22%	25%	34%
28 days	2%	4%	1%	0%	0%	3%	4%	1%
User specified	11%	17%	22%	43%	11%	14%	24%	35%
Other	4%	10%	11%	6%	2%	9%	10%	7%

Hardware Circulation

Do libraries circulate actual e-reading devices? Not generally, but it is on the rise. A scant 15% do (up from 7%) while fifty-nine percent of all public libraries do not circulate preloaded e-readers (down from 69% last year). Still, one-fourth of libraries are considering it—essentially unchanged from last year. In our 2011 survey, we asked if circulating ereading devices were for in-library use only or could be taken home. Fourteen percent responded that their circulating ereaders were for take-home use, while 1% said they were for in-library use only. Naturally, big concern over circulating ereaders is potential loss of or damage to the device.

Figure 32. Q24: Does your library circulate preloaded e-reading devices? — All public libraries

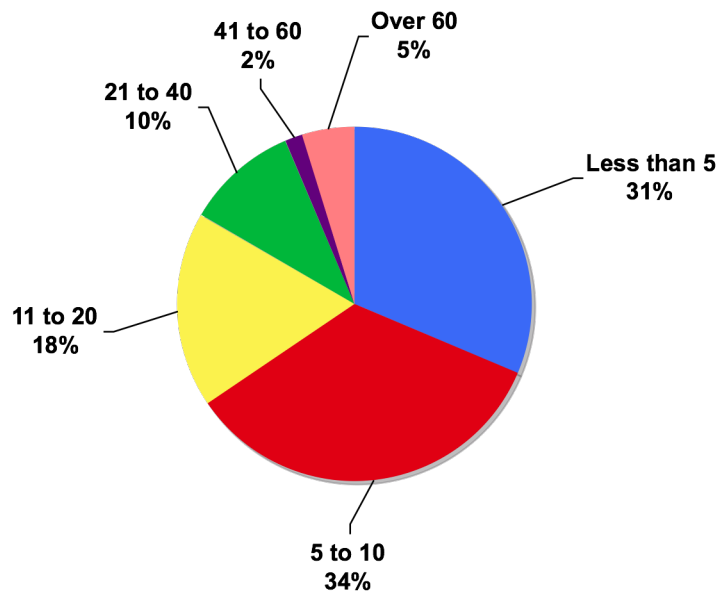
Larger libraries continue to be the least likely to be circulating or considering circulating the actual devices. Libraries in general are awaiting device standardization before entering this arena. Another obstacle is the issue of getting IT on board to support the devices.

Table 30. Q24: Does your library circulate preloaded e-reading devices? — 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+
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%
2010								
Yes	12%	10%	5%	2%	9%	9%	8%	5%
Not currently, but considering	29%	28%	22%	15%	24%	31%	19%	21%
No	59%	62%	74%	83%	67%	59%	73%	73%

In our 2011 survey, we asked a follow-up question to identify the number of hardware ereading devices public libraries have on hand. Of the 18% of public libraries that responded “yes” to Question 24, about one-third (34%) maintain between 5 and 10 ereading devices, while another 31% maintain less than 5. The average number of devices maintained is 15.6 (median 6.0).

Figure 33. Q25: If yes, how many preloaded ereading devices does your library maintain? —Public libraries that circulate ereading devices



The base for this question was fairly small, making cross-tabulations less than robust. Not surprisingly, the libraries maintaining the largest collections of hardware ereaders are the largest libraries with the largest materials budgets.

Specific Ereaders Circulated

Of those libraries that do circulate the actual hardware devices (the 18% who responded “yes” to Question 24), most (75%) circulate the Barnes & Noble Nook (since our last survey, Barnes & Noble released the NookColor, an LCD-based version of their ebook reader that makes it more of a tablet PC like the iPad than a dedicated ebook reader like the Kindle). The earlier black-and-white electronic-paper-based Nook was only circulated by 10% of libraries in our 2010 survey.

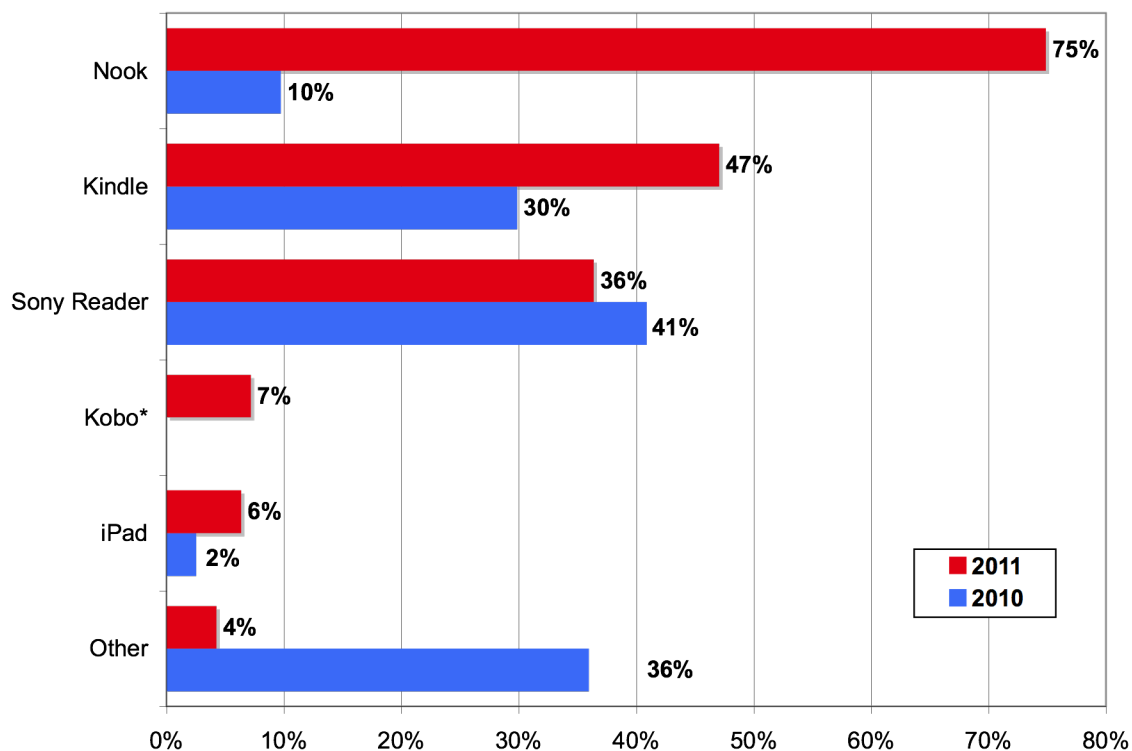
Forty-seven percent of public libraries circulate Amazon Kindles (up from 30%), while the Sony Reader is gradually losing favor (down from 41% to 36%). Sony just announced a new low-cost, lightweight Reader that will feature long-absent WiFi connectivity, obviously designed to go head-to-head with the Kindle.

During our survey period earlier in the year, the NookColor and the Sony Reader were the most compatible readers for library downloads. OverDrive has since begun supporting the Kindle.³ See the “In Their Own Words” section at the end of Chapter 5 for our public library respondents’ feelings about this development. At

³ Michael Kelley, “Amazon to Allow Library Lending of Kindle Books (Updated),” *Library Journal*, April 20, 2011.

the same time, Amazon has announced even cheaper versions of the Kindle and its own tablet, the Kindle Fire, designed to compete with the iPad. So next year's survey will see more movement among these devices.

Figure 34. Q26: If yes, which preloaded e-reading device(s) does your library circulate? —Public libraries that circulate ereading devices (multiple responses permitted)



*Added in 2011 survey.

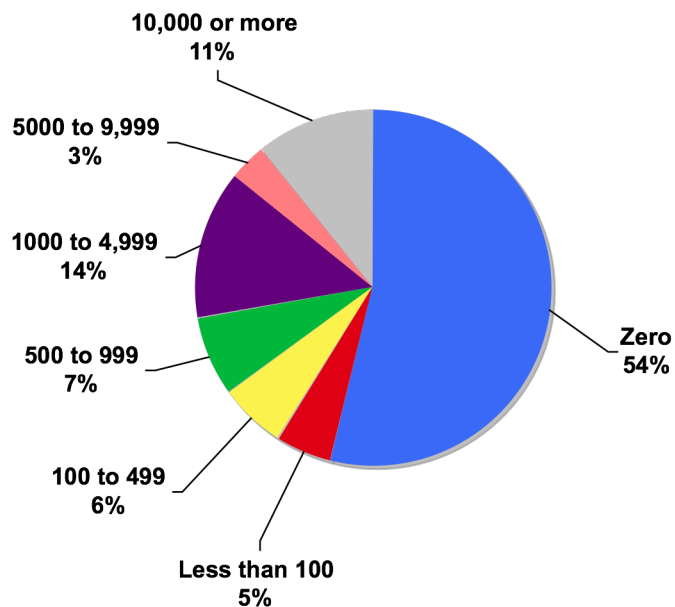
Again, the base for this question was fairly small, making cross-tabulations less than robust.

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 on the rise or starting to level off?

Ebook Circulation—FY2009

Only two years ago, in Fiscal Year 2009, more than one-half (54%) of libraries that offer ebooks now said their ebook circulation was zero—although 11% said that their circulation was 10,000 or more. The mean ebook circulation in FY 2009 was 5,138 (including zero responses); mean ebook circulation *excluding* zero responses was 11,175.

Figure 35. Q19: What was your ebook circulation in FY 2009? —All public libraries with ebooks**Table 31. Q19: What was your ebook circulation in FY 2009? —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+
Zero	70%	55%	54%	18%	78%	60%	55%	33%
Less than 100	13%	6%	0%	3%	9%	12%	3%	1%
100 to 499	6%	10%	5%	0%	6%	9%	6%	3%
500 to 999	6%	8%	7%	0%	3%	7%	11%	3%
1000 to 4,999	2%	17%	17%	15%	3%	11%	13%	21%
5000 to 9,999	1%	1%	5%	10%	0%	1%	6%	6%
10,000 or more	2%	3%	13%	54%	1%	2%	6%	33%
Mean FY 2009 ebook circ (including 0)	454	2,603	4,216	29,875	327	522	3,607	17,002
Median FY 2009 ebook circ (not including 0)	1,536	5,760	9,150	36,411	1,472	1,290	7,950	25,220

Ebook Circulation—FY2010

A year later, in Fiscal Year 2010, only 17% of public libraries said their ebook collection's circulation was zero (libraries with non-circulating reference only or ebook collections so new, they have no stats yet). More than one-half (57%) of public libraries reported that their ebook circulation in FY 2010 was 1,000 or more. The mean (including zero responses) ebook circulation in FY 2010 was 11,281—more than double 2009's average; mean ebook circulation *excluding* zero responses was 13,529.

Figure 36. Q19: What was your ebook circulation in FY 2010? —All public libraries with ebooks

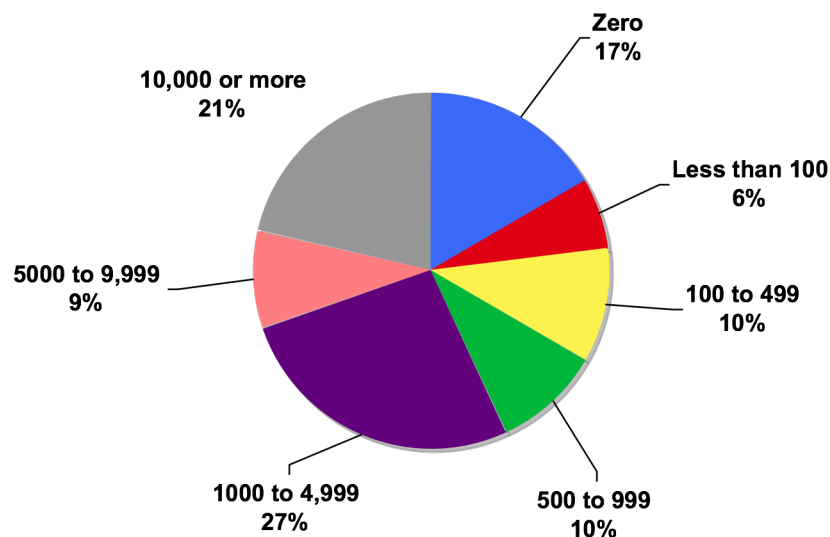


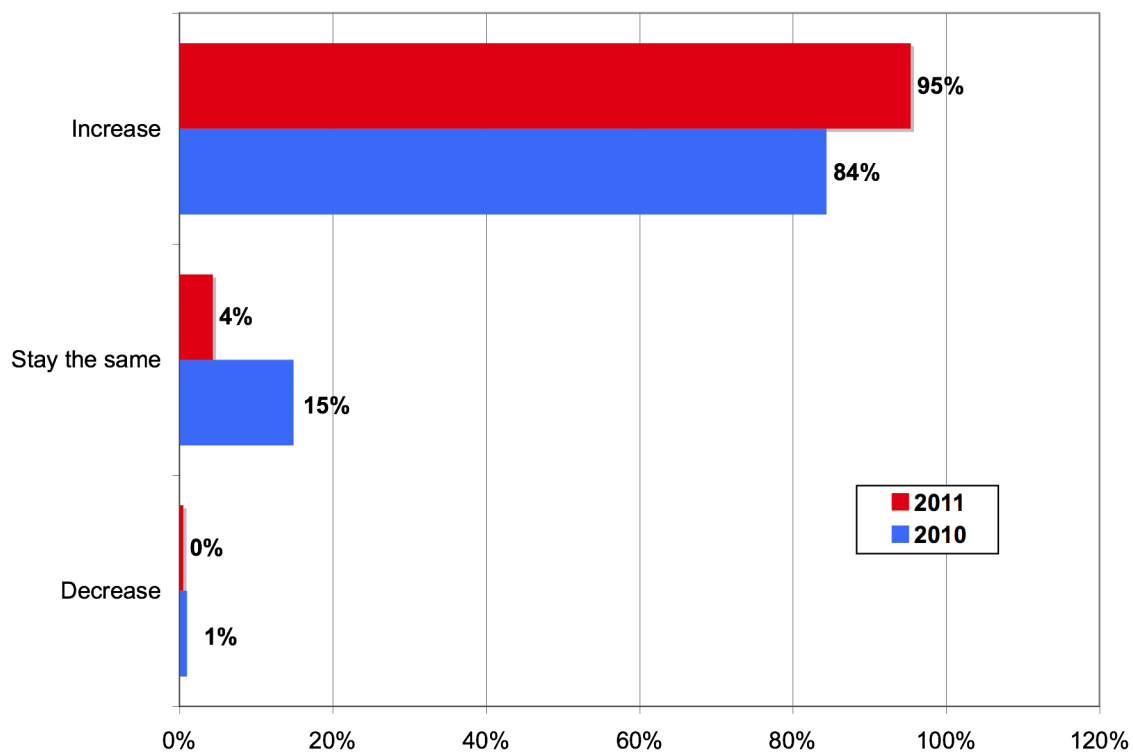
Table 32. Q19: What was your ebook circulation in FY 2010? —Public libraries with ebooks by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Zero	25%	16%	18%	3%	27%	21%	18%	5%
Less than 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

Ebook Circulation FY 2011

The overwhelming majority of survey respondents (95%) expect ebook circulation to increase this year compared to last year, while only 4% expect it to remain the same. Less than 1% expects a decrease in ebook circulation. The overall percent change in circulation expected for this fiscal year is an increase of 108%.

Figure 37. Q20: Compared to last year, do you expect this year's circulation of ebook titles to increase, stay the same, or decrease? —All public libraries



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

	2010	2011
Average % increase	43%	113%
Average % decrease	8%	38%
Overall % change Expected	+36%	+108%

Larger libraries expect larger increases in ebook circulation than smaller libraries, but libraries almost across the board are expecting ebook circulation to double this year compared to last.

Table 33. Q18: Compared to last year, do you expect this year's circulation of ebook titles to increase, stay the same, or decrease? —Public libraries by population served and materials budget

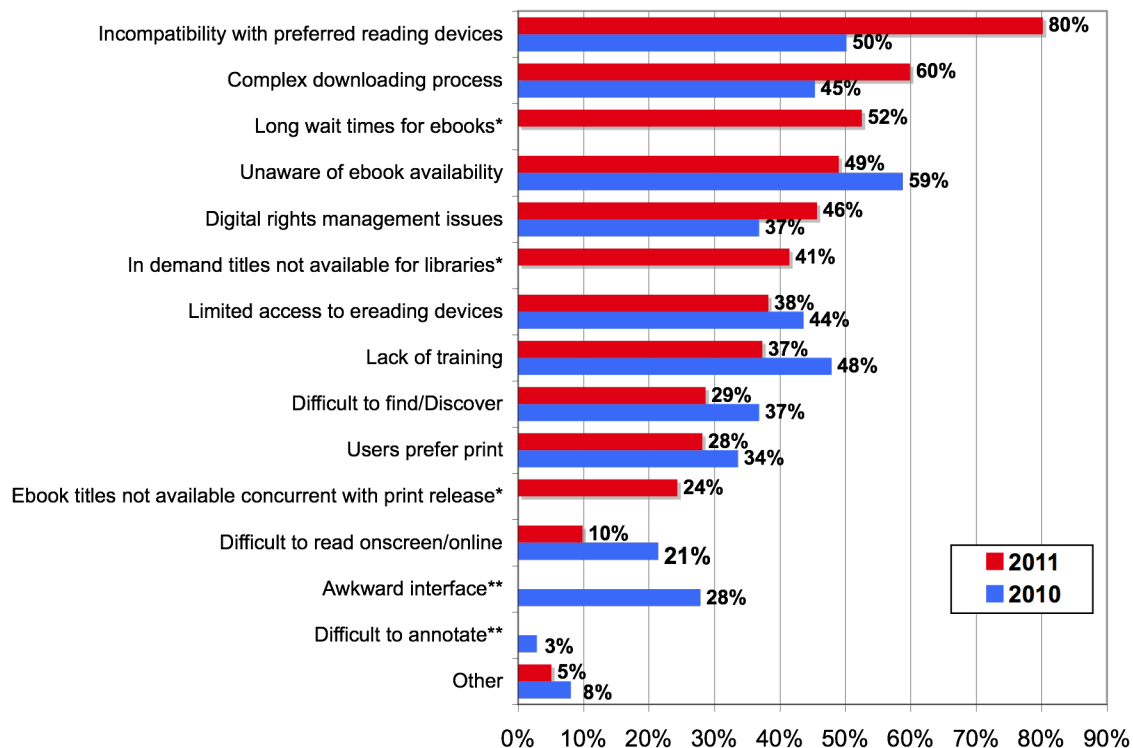
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
Increase	89%	96%	97%	98%	85%	95%	96%	98%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%
Less than 10%	2%	2%	3%	0%	4%	1%	2%	4%
10% to 24%	21%	17%	14%	11%	23%	14%	18%	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
2010								
Increase	79%	87%	83%	95%	78%	80%	89%	90%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%
Less than 10%	16%	6%	4%	3%	9%	8%	9%	3%
10% to 24%	41%	44%	51%	39%	41%	45%	45%	44%
25% to 49%	15%	20%	15%	27%	24%	19%	17%	21%
50% to 74%	11%	14%	5%	10%	9%	13%	7%	10%
75% to 99%	1%	2%	4%	2%	0%	3%	4%	0%
100% or more	15%	14%	21%	19%	17%	12%	17%	21%
Average % increase	35	39	50	49	35	37	44	51
Stay the same	21%	13%	16%	3%	22%	18%	10%	10%
Decrease	0%	0%	2%	2%	0%	1%	1%	0%
Average % decrease	0	0	8	10	0	10	5	0
Overall % change expected	+28	+33	+41	+46	+27	+29	+39	+46

Barriers to Ebook Consumption

The biggest barrier to ebook consumption, say public library respondents, is “incompatibility with preferred reading devices,” selected by an overwhelming majority of 80% of respondents, up from 50% last year. (On last year’s survey it was phrased as “Not available for preferred devices.”) “Complex downloading process” was selected by 60% of respondents, up from 45%. A new item we added in our 2011 survey—“long wait times for ebooks”—appeared at number three, selected by 52% of respondents.

Some barriers have been crumbling, especially “difficult to read onscreen/online”; last year that was selected by 21% of respondents. This year it dropped to 10%. “Lack of training” is also dropping—from 48% to 37%—as is “unaware of ebook availability”—from 59% to 49%.

Figure 38. Q29: What hinders the public from reading your library’s ebook content? —All public libraries (multiple responses permitted)



*Added to 2011 survey.

**Included in 2010 survey only.

The barriers to ebook access for large metropolitan libraries are greater for every hindrance measured, except “users prefer print.”

Table 34. Q29: What hinders the public from reading your library’s ebook content? —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+
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%
2010								
Unaware of ebook availability	55%	61%	57%	69%	62%	56%	58%	63%
Not available for preferred devices	38%	48%	54%	69%	37%	49%	47%	67%
Lack of training	44%	50%	46%	53%	59%	45%	45%	47%
Complex downloading process	33%	49%	43%	68%	22%	46%	49%	60%
Limited access to ereading devices	49%	44%	39%	51%	41%	46%	40%	48%
Limited titles available	49%	44%	35%	39%	52%	46%	39%	33%
Difficulty with DRM	30%	40%	33%	54%	11%	39%	42%	45%
Difficult to find/Discover	32%	43%	31%	39%	32%	38%	39%	38%
Users prefer print	35%	33%	34%	27%	38%	36%	32%	29%
Awkward interface	18%	30%	28%	32%	19%	27%	30%	29%
Difficult to read onscreen/online	19%	18%	22%	31%	17%	23%	19%	24%
Difficult to annotate	2%	4%	2%	2%	3%	2%	4%	2%
Other	5%	5%	13%	5%	6%	6%	9%	7%

Technical Barriers

With more users downloading ebooks, there was an increase in the number of people reporting technical problems. Users reporting technical problems “often” rose from 11% last year to 20%, while those reporting technical problems “sometimes” rose from 54% to 59%. The “rarely” and “never” responses declined from last year.

Figure 39. Q32: How often do your users report technical problems when downloading an ebook? —All public libraries

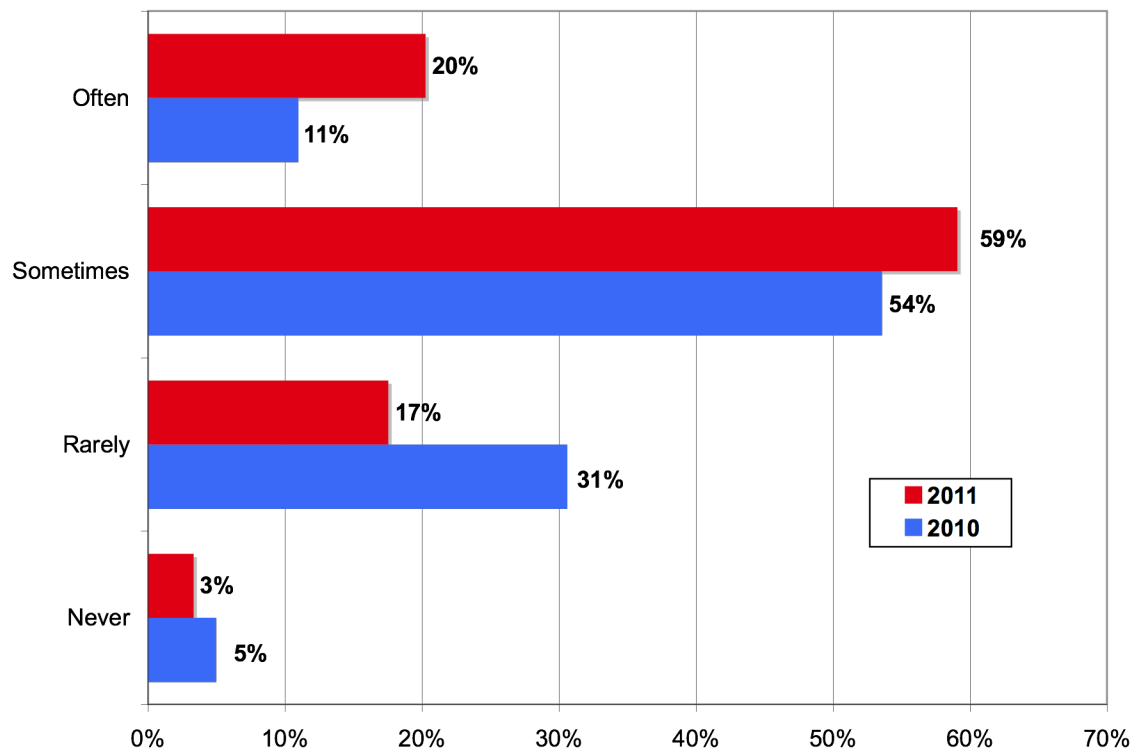


Table 35. Q24: How often do your users report technical problems when downloading an ebook? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
Often	4%	11%	11%	19%	2%	8%	15%	16%
Sometimes	44%	55%	55%	69%	40%	54%	53%	63%
Rarely	41%	31%	30%	12%	41%	33%	29%	21%
Never	11%	3%	4%	0%	17%	5%	3%	0%

General Conclusions

The decision by libraries to add ebooks to their collections is predominantly patron-driven. Libraries have been adding ebooks due to demand, and libraries expect that demand to increase substantially—even more than they did a year ago.

As we said in the last chapter, library users have their favorite devices, and they want ebooks to work on them. When that doesn't happen, it's a recipe for frustration and disappointment. Thus we see spikes in barriers to ebook adoption like "not available for preferred device." However, the expected impact of the Amazon Kindle/OverDrive partnership on demand and use cannot be measured at this writing.

In Their Own Words...

Here, we continue the "verbatim" comments from the end of Chapter 2 that comprise our survey respondents qualitatively expressing (or venting) their opinions of ebooks, how they have impacted their libraries, and what some of their problems with publishers and vendors have been.

- Most of our ebooks are available through a consortium collection, but we have also started our own collection to fulfill some patron needs in our specific community.
- I would like to see more international language titles available as ebooks.
- No to HarperCollins' 26 circ model!
- Nonfiction in NetLibrary limits to 24 hours. Slow readers are going to avoid.
- Noticed a huge increase in requests after Christmas 2010.
- One of my managers shared with me that when we ran ads on the radio and in the newspaper, the circ on ebooks was up 400%. That's HUGE for us.
- Our community finds it difficult to afford e-book devices, as does the library. It would be great to have one for the library that patrons can try out.
- Our consortium recently decided not to purchase HarperCollins ebooks until a new agreement is reached. I understand publishers needing to put limits on library's lending of ebooks, but what we would prefer is a model that had unlimited simultaneous borrowing (i.e. no holds—patrons don't understand waiting for an ebook) and we would pay a higher fee for access to this type of service for the rights to a book. But limiting a book to 26 times for circulation is ridiculous and won't work with libraries. Libraries need to decide how to work this to our advantage—we need to control the outcome!
- Our eBooks are purchased completely based on our patrons. When they wish to borrow the Kindle from the library, we give them the option of the

library purchasing one ebook which we will load onto the Kindle (in addition to multiple other titles to the Kindle's maximum capacity). This allows patrons to have control over what they get to read on the Kindle while giving them a chance to "pick up" other titles as well so they explore what other items the library has to offer via the Kindle. We also offer tutoring sessions about how to maintain and use the Kindle each time it is checked out by a new user. There has been great demand for the Kindles (our waiting list will take us well into the fall) but patrons still inquire about borrowing specific ebooks that they may download onto to their own device. Perhaps we can look into this next.

- Our library and our county library cooperative are launching ourselves into the world of ebooks with enthusiasm. If we don't, we will be ignoring the needs and requests of our patrons, and we will be rendered obsolete.
- In March 2010 we formed a consortium and added ebooks. Skyrocketed after Christmas. Expecting another surge once Kindle interface is ready. Demographic is older than I thought (40+) on the dedicated ereaders. Younger seem to use iPads. Some say they will never use ereaders. Others don't want it in print anymore. Most patrons using ereaders also still read in print.
- Ebooks were added to the Library2Go program in 2010 and really took off at Christmas.
- Our main issue is not being able to use OverDrive on our public computers, so patrons are not able to download ebooks here in the library.
- Our materials budget was static for over 10 years and in the last few was actually decreased. For us, it will imperative that we can offer ebooks at a reasonable cost to the library.
- OverDrive's partnership with Adobe's Digital Editions, and Digital Editions' limitations on the number of places a patron can install the software with their ADE account, effectively prevents patrons from using the library's computers to download ebooks. Our public computers, like many public libraries', are set up with Deep Freeze which would erase Digital Editions and the attached account information after patrons log off our computers. This "burns through" one of the uses of the account. Setting up is a complicated procedure and it's less than stellar service to have to tell a patron about the process, give them handouts, and cross fingers that they'll be able to handle this at home since it's better not to go through it on the library's computers. I have found that the iPhone/iPad mobile version is a much easier way to handle OverDrive, and I hope they develop an Android tablet application.
- What I find is that the people using the library's ebooks are not the tech-savvy crowd. Many have bought or have been given the device because they can no longer read regular or even standard large print, and want to be able to enlarge the text. That they need to set up their device with the

manufacturer's account requirements, then Digital Editions, then their library/OverDrive account—there has to be a way to streamline this in future iterations.

- Patrons can download ebooks in our libraries via our WiFi network to their personal laptops or mobile devices. However, downloading is not supported on our regular public terminals.
- Patrons have mostly been happy with our ebooks and Overdrive, though sometimes frustrated when they have trouble downloading or getting the ebook from Adobe Digital Editions to their ereader device.
- Patrons love them, librarians love them, I just hope publishers and vendors don't price them out of library's range or limit access for what could be seen as a viral marketing campaign for books.
- Popularity seems to be growing daily—as devices become less expensive more people are trying them. Also lots of press about e-books is helping build awareness.
- Since 2010 ebooks have become more in demand. Patrons are calling the library and coming in with questions on whether or not the library offers ebooks to use with Kindles and Nooks. It is a new technology that is slowly gaining more popularity and libraries will have to rise and meet this demand. Though print sources will not be replaced by this format, ebooks are a big contender in the library world.
- So far I am taking a wait and see attitude before I commit to a vendor—our funds would have to come from our book budget which is limited. We had a bad experience with our downloadable audiobook vendor several years ago which was expensive and difficult to use—I do not want to repeat that.
- Someone please facilitate more conferences for dialog between librarians and ebook vendors to continue brainstorming how to meet the needs of users/readers. The research exists on people's expectations of accessing e-content: let's use it to help make vendors and libraries the “good guys” instead of obstacles.
- Starting this year we have really been collection building for all ages groups—adult, teen and children's. It was great to see Houghton Mifflin Harcourt offer some great children's titles as ebooks including many of the Curious George classics and Mike Mulligan and other classic titles by Burton. More Newbery and Caldecott titles are becoming available. It's all very exciting to be building these collections.
- Leasing models are a major barrier to growth in the library market.
- The demand hit hard at Christmas, and continues. We do not have enough material for all who want it.
- I am concerned about the limited licensing from Harper Collins, but even more concerned about the publishers that don't sell to libraries.

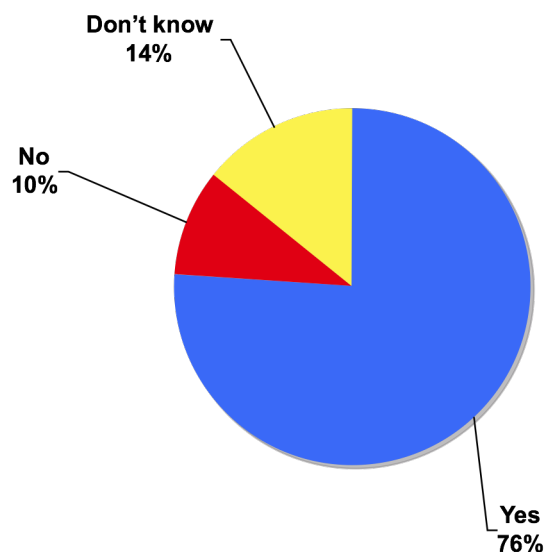
- The divide between those patrons who will accept “print only” and those who will accept “digital” isn't a generational difference.
- The hardest part about the cumbersome nature of DRM and licensing is that patrons believe WE (as libraries) have put these restrictions in place, making us the bad guys.
- They are becoming increasingly popular as the devices become more affordable. I have personally integrated ebooks into my normal reading routine on a multipurpose device. Our school district is showing interest so I predict we will only see more usage.
- They are popular among our younger readers and our older users and the middle group still seems to like print.
- They are so popular and growing in popularity daily. We've recently added picture books, but the format is not like reading the book. It will be interesting to hear the patron's comments.
- They have become more popular since Christmas, when many people were given ereaders as gifts. They are fast becoming an integral part of what we are.
- Until the device compatibility and DRM issues get straightened out, we will continue to have more dissatisfied patrons than satisfied ones.
- Usage continually increases. Although we do not offer classes our reference staff are ready to help any patron with their device to download e-books.
- Users don't understand DRM. If the library has an ebook title listed in its collection, users feel that it should be available instantly and to everyone at the same time, just like all other electronic material on the internet.
- Very popular; we're having difficulty getting enough titles with our limited budget.
- We are currently considering purchasing extra copies of ebooks for our library because demand has been so high.
- We are currently forming a collection development team and opening an OverDrive Advantage account to better control and market our ebook offerings, marketing, training, etc. because we have noticed a large increase in interest from patrons.
- We are experiencing a 5th year of severe budget cuts, its a shame we have to now get yet another “book” format, when we cannot even afford to buy real books, or even get a COLA :(

4. EBOOKS, PRINT BOOKS, AND MATERIALS BUDGETS

Attracting New Users

Has the addition of ebook collections attracted new users that may never have used a library before? Just over three-fourths (76%) of public library respondents said that, yes, by offering ebooks, they have attracted new users to the library. Only 10% said no, while 14% didn't know.

Figure 40. Q30: Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before? —All public libraries



Larger libraries are more likely to have attracted new users thanks to their ebooks than smaller libraries.

Table 36. Q30: Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before? —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	66%	74%	81%	92%	70%	71%	75%	84%
No	15%	8%	8%	4%	12%	11%	8%	9%
Don't know	19%	17%	11%	4%	18%	18%	17%	7%

Electronic vs. Print

Are there users who only want ebooks and have no interest in checking out printed books? Yes and no—43% of public library respondents said they have heard of customers who are “e” only and decline to borrow print editions, while 57% have not.

Figure 41. Have you heard of customers who only want ebooks and decline to borrow print editions? —All public libraries

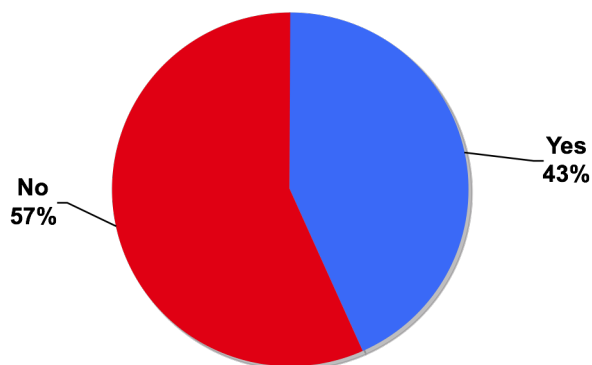


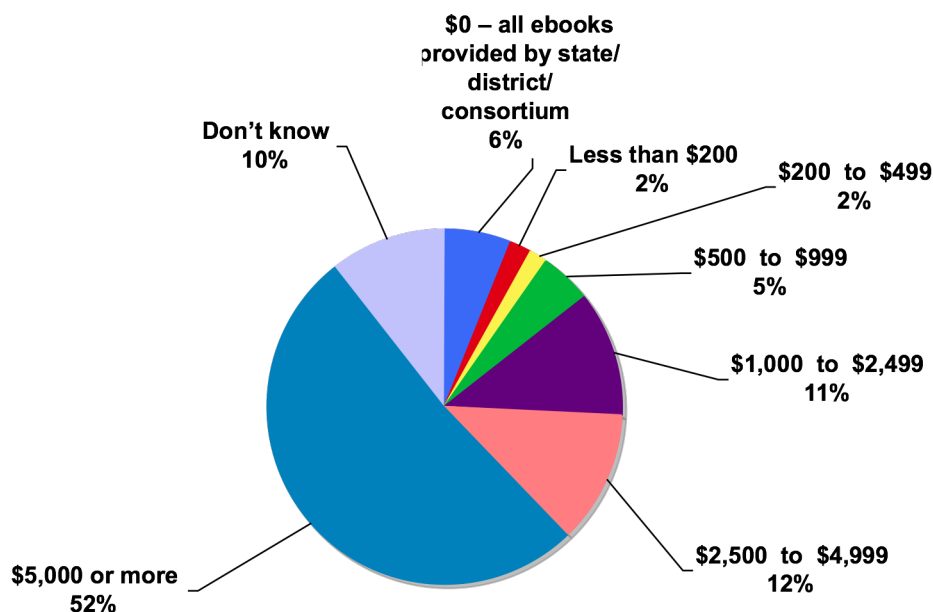
Table 37. Q31: Have you heard of customers who only want ebooks and decline to borrow print editions? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
Yes	36%	39%	52%	51%	38%	38%	42%	52%
No	64%	61%	48%	49%	62%	62%	58%	48%

Current Spending on Ebooks

In our 2011 survey, we asked public libraries how much they expect to spend on ebooks in the current fiscal year. On average, libraries plan to spend \$25,833 (median \$9,500) on ebooks this year. Half of all libraries (52%) expect to spend more than \$5,000 on ebooks in the current fiscal year.

Figure 42. Q42: Approximately how much does your library expect to spend on ebook titles this fiscal year? —All public libraries



There is quite a range in ebook spending which, naturally, varies by size and materials budget. The smallest libraries expect to spend on average \$2,140, while biggest expect to spend \$132,701.

Table 38. Q42: Approximately how much does your library expect to spend on ebook titles this fiscal year? —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+
\$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

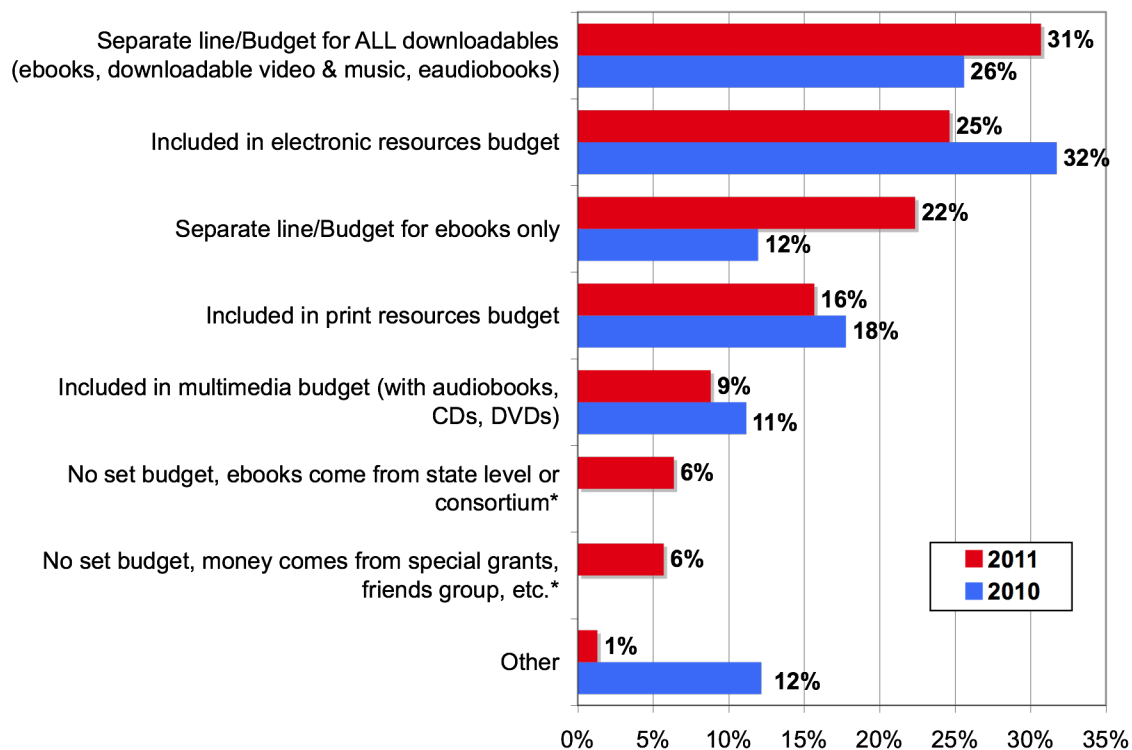
Ebooks and the Library's Materials Budget

So now that we know how much libraries expect to spend on ebooks, how are they paying for it?

Where do libraries account for ebooks in their materials budget? That is, are they considered part of electronic resources, part of print resources, or are they their own budget line item? And has that changed at all from last year?

Increasingly, libraries are adding separate budget lines for all downloadable materials (including audio books)—this rose from 26% of all public libraries last year to 31% this year. This supplanted “included in electronic resources budget” which dropped from 32% last year to 25% this year. “Separate line/budget for ebooks only” is also becoming far more popular—it rose from 12% of all public libraries last year to 22% this year. We added two items to this question in the 2011 survey: “No set budget, ebooks come from state level or consortium” and “no set budget, money comes from special grants, friends, etc.” These were each selected by 6% of respondents.

Figure 43. Q31: How are ebooks represented in your library's materials budget? —All public libraries



*Added to 2011 survey.

Regardless of size, the print book budget is decreasingly used to account for ebook purchasing. For libraries with small materials budgets, ebooks are still often considered as part of the print resources budget, although more of these (24% up from 15%) have separate budget lines for downloadables in general, if not ebooks alone. Smaller libraries are the most likely to have ebooks paid for on the state level/consortium or by special grants or friends groups.

Large libraries are likely to have a more detailed materials budget accounting system, and thus 50% of over-500,000 population-served libraries (down from 53%) have a separate line for all manner of downloadable items, while 32% (up from 23%) have a separate line for ebooks only.

Table 39. Q40: How are ebooks represented in your library's materials budget? —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+
2011								
Separate line/Budget for ALL downloadables (ebooks, downloadable video & music, eaudiobooks)	24%	21%	38%	50%	13%	24%	36%	39%
Included in electronic resources budget	19%	22%	27%	32%	18%	25%	22%	27%
Separate line/Budget for ebooks only	9%	20%	30%	32%	6%	16%	24%	35%
Included in print resources budget	21%	18%	12%	9%	25%	20%	15%	7%
Included in multimedia budget (with audiobooks, CDs, DVDs)	9%	13%	7%	3%	12%	8%	13%	6%
No set budget, ebooks come from state level or consortium	14%	8%	3%	0%	21%	7%	4%	1%
No set budget, money comes from special grants, friends group, etc.	13%	3%	6%	0%	13%	7%	4%	2%
Other	2%	2%	0%	0%	3%	2%	0%	0%
2010								
Included in electronic resources budget	25%	32%	36%	27%	17%	33%	39%	25%
Separate line/Budget for ALL downloadables (ebooks, downloadable video & music, eaudiobooks)	15%	23%	26%	53%	8%	17%	22%	50%
Included in print resources budget	29%	22%	11%	17%	38%	22%	15%	13%
Separate line/Budget for ebooks only	7%	8%	13%	23%	8%	7%	10%	23%
Included in multimedia budget (with audiobooks, CDs, DVDs)	16%	9%	11%	3%	13%	12%	11%	8%
Other	11%	9%	15%	3%	21%	11%	11%	4%

Ebooks in Last Year's Materials Budget

Public library respondents estimate that last year ebooks comprised, on average, about 2% of their library's materials budget (2.0% mean; 1.4% median).

Figure 44. Q41: What percentage of your library's materials budget did ebooks represent last year? —All public libraries

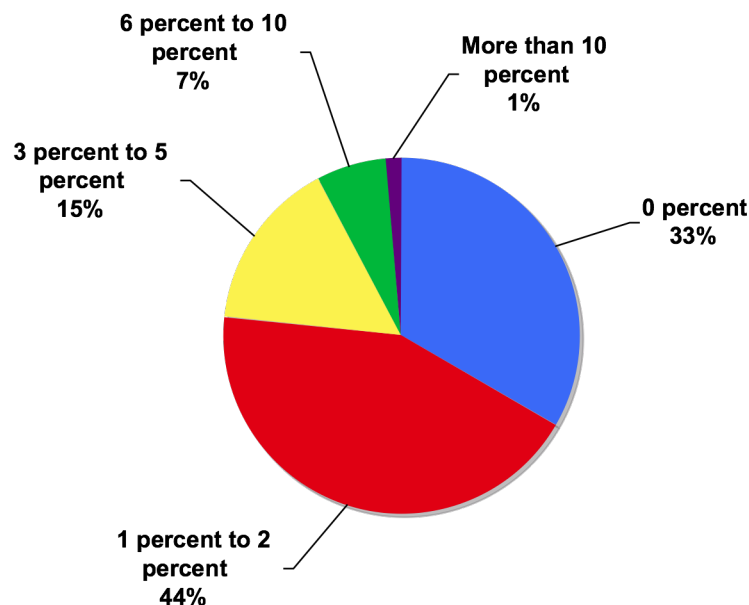


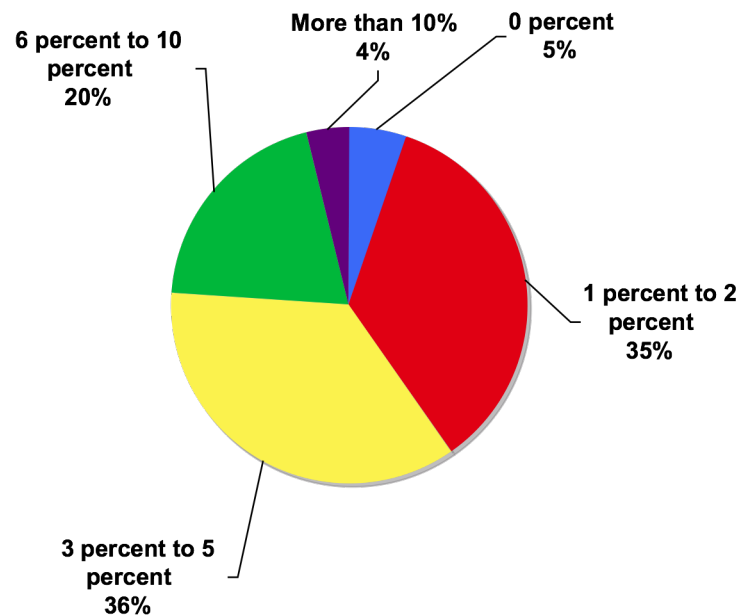
Table 40. What percentage of your library's materials budget did ebooks represent last year? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
0 percent	45%	36%	31%	6%	42%	45%	32%	17%
1 percent to 2 percent	35%	39%	45%	68%	36%	32%	47%	54%
3 percent to 5 percent	14%	16%	15%	19%	14%	17%	13%	19%
6 percent to 10 percent	4%	8%	7%	6%	6%	5%	7%	9%
More than 10 percent	2%	1%	1%	0%	1%	2%	1%	1%
Mean %	1.6	2.0	2.0	2.3	1.8	1.7	1.9	2.4
Median %	1.1	1.4	1.4	1.6	1.2	1.2	1.4	1.6

Ebooks in the Current Materials Budget

This year, ebooks have grown substantially and now represent, on average, 4.0% of public libraries' materials budgets (median 3.5%).

Figure 45. Q41: What percentage of your library's materials budget do ebooks currently represent? —All public libraries



The mean percentage of materials budget spent on ebooks remains fairly consistent, ranging from 3.6% among the smallest libraries to 4.6% among the largest.

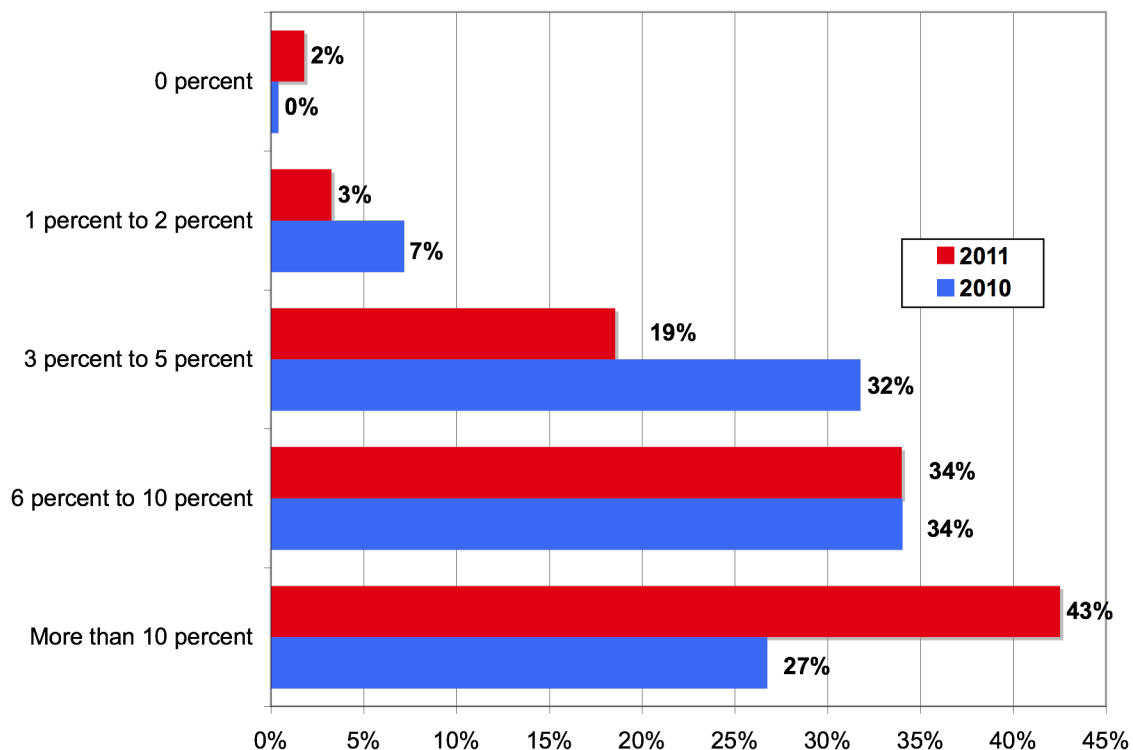
Table 41. Q41: What percentage of your library's materials budget do ebooks currently represent? —Public libraries by population served and materials budget

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
0 percent	10%	5%	5%	0%	13%	7%	4%	1%
1 percent to 2 percent	44%	30%	37%	30%	35%	37%	39%	30%
3 percent to 5 percent	26%	39%	35%	40%	28%	33%	35%	41%
6 percent to 10 percent	16%	21%	21%	27%	21%	21%	16%	24%
More than 10%	5%	5%	2%	3%	3%	3%	6%	4%
Mean %	3.6	4.3	3.9	4.6	3.7	3.9	4.0	4.5
Median %	1.9	3.8	3.5	4.0	3.1	3.4	3.4	3.9

Ebooks' Portion of Future Materials Budget

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, 7.4% of their materials budget in five years (i.e., 2015). In this year's survey, our respondents feel that ebooks will account for, on average, 8.8% of the materials budget (median 9.1%) in 2016. An increasing number of public libraries (43%, up from 27%) feel that ebooks will account for more than 10 percent of their total materials budget. Are these budget projections too ambitious, too modest or on target? Time will tell.

Figure 46. Q32. What percentage of your library's materials budget do you predict ebooks will represent in 5 years? —All public libraries



The mean percentage represented by ebooks rises with library size and size of materials budget.

Table 42. Q32. What percentage of your library's materials budget do you predict ebooks will represent in 5 years? —Public libraries by population served and materials budget

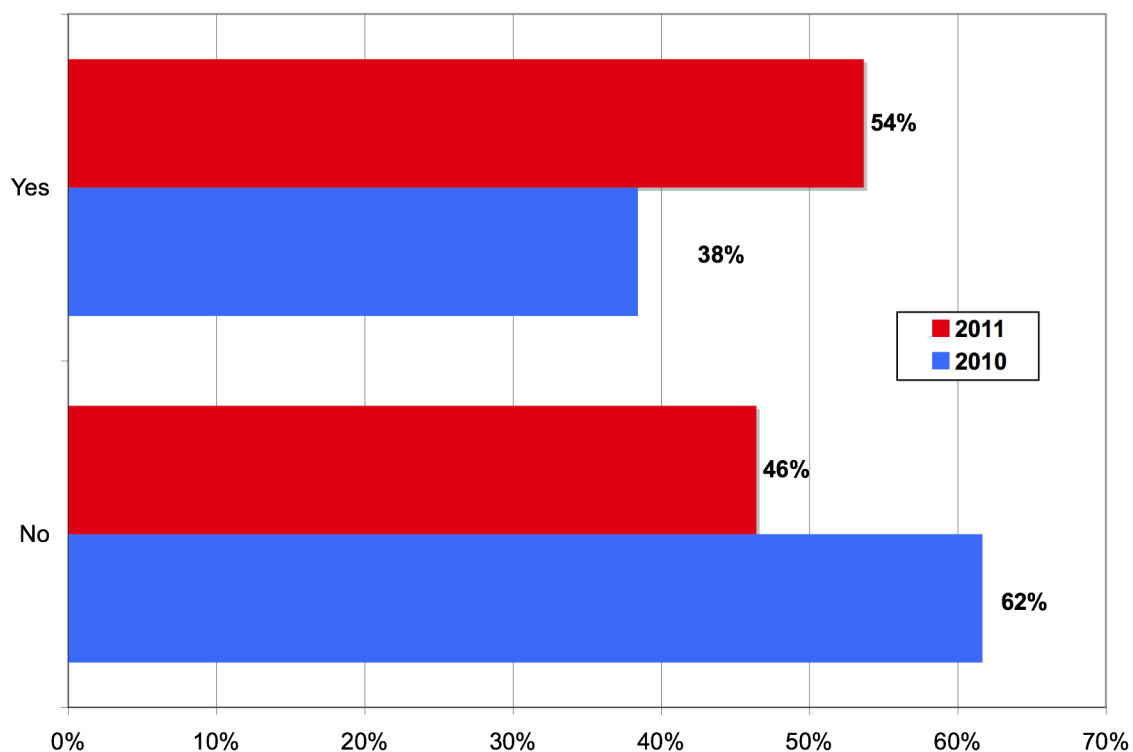
	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
2011								
0 percent	4%	2%	1%	0%	5%	3%	1%	0%
1 percent to 2 percent	6%	4%	1%	0%	9%	3%	1%	3%
3 percent to 5 percent	21%	21%	16%	21%	18%	18%	21%	20%
6 percent to 10 percent	33%	28%	42%	24%	35%	30%	36%	30%
More than 10 percent	36%	45%	40%	55%	33%	45%	40%	47%
Mean %	8.1	8.7	9.0	9.7	7.8	8.8	8.8	9.1
Median %	8.3	9.3	9.1	11.4	8.1	9.4	8.9	9.6
2010								
0 percent	2%	0%	0%	0%	0%	1%	0%	0%
1 percent to 2 percent	18%	4%	4%	4%	13%	13%	3%	4%
3 percent to 5 percent	26%	37%	33%	11%	43%	27%	36%	22%
6 percent to 10 percent	32%	33%	33%	56%	22%	35%	35%	44%
More than 10 percent	22%	25%	30%	30%	22%	24%	26%	30%
Mean %	6.6	7.4	7.7	8.6	6.4	7.1	7.5	8.2
Median %	6.5	7.0	7.5	8.5	4.7	7.0	7.2	8.2

Reallocation of Funds

Were any funds reallocated from print or other physical materials to pay for ebooks? Last year, just over a third of public libraries (38%) said they reallocated funds. In our current survey, more than one-half (54%) of respondents said they reallocated from physical materials formats to pay for downloadables.

We'll have a better sense in our next survey of what the long-term trend is, and where the "stasis" between physical and downloadable budget will be. For now, as ebooks expand, it is only logical—given the reality of public libraries' decidedly finite budgets (especially in the current economy)—that funds be reallocated from other, non-growing collection categories. Given the data we saw earlier about ebook collections attracting new users to the library, it's a reallocation that makes sense.

Figure 47. Q43: In the past year, did your library reallocate funds from its physical materials formats to pay for electronic, downloadable copies? — All public libraries



Small libraries and libraries with small materials budgets continued to be the least likely to reallocate any funds from physical to electronic media.

Table 43. Q43: In the past year, did your library reallocate funds from its physical materials formats to pay for electronic, downloadable copies? — 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+
2011								
Yes	43%	52%	58%	65%	38%	49%	57%	63%
No	57%	48%	42%	35%	62%	51%	43%	38%
2010								
Yes	28%	43%	41%	45%	33%	31%	46%	43%
No	72%	57%	59%	55%	67%	69%	54%	57%

General Conclusions

One benefit of the ebook revolution is that it is driving new users into public libraries. Anything that boosts library use is a good thing and ebooks have been overwhelmingly embraced by public libraries and librarians. In terms of budgeting, ebooks still represent a small percentage of the overall materials budget (around 4% on average), but that is growing. Whether that growth rate will continue remains to be seen, but so far libraries have seen demand for ebooks continue to grow, therefore it's a reasonable expectation.

In Their Own Words...

Here, we conclude the write-in responses to the questionnaire item soliciting general comments about ebooks:

- We are still waiting for a model that allows more than 1 user to download an ebook at a time. Ereader owners do not want to wait for an e-book. Maybe Freading?
- We are struggling with the limitations of one vendor who is also the hosting service. The selection and acquisitions options from ContentReserve are so difficult to use effectively in our environment.
- We are surprised at the recent surge of requests for ebooks. Which has encouraged us to move forward in joining a local consortium.
- We are the only system in South Carolina to lend Kindles right now. It has helped get attention in the State Capitol, where the progressive nature of libraries is not always apparent.
- We are waiting for people with more reasonable pricing than OverDrive. That would be 3M, Ingram, and EBSCO.
- We are wrestling with a severely reduced materials budget and a huge increase in the demand for ebooks. Our dilemma is how to provide an ebook service which is at least equal to or even better than our customers demand with less financial resources available. A more discounted initial price for ebooks would be beneficial.
- We began purchasing ebooks in Jan 2011 and they have been very popular. We expect to increase our budget yearly.
- We check out devices and have a several month long wait for most of them
- We circulate 3 Nooks that are NOT preloaded. We encourage our patrons to download titles from the Overdrive Consortium we belong to. This survey asked if we circulated preloaded devices, but did not give the opportunity to indicate non-preloaded devices. I don't preload because I want people to use the consortium, and I don't want to tie up a lot of money in a single circulating unit.

- We have been developing a Gale Virtual Reference Library (GVRL) reference ebook collection since 2008. We are in the process of partnering with 10 other surrounding library systems to develop an E-Library consortium with OverDrive, which should be live by mid-August, 2011. We will focus on popular/bestselling fiction, primarily in ePUB ebook format and MP3 downloadable audiobooks. We have had a steadily increasing patron request for this service for the last 2 years, and our patrons are excited that we will soon be offering downloadable ebooks. Some of my answers have been with the soon to be offered service in mind.
- We have been surprised by the increase in the number of ebooks that have circulated. Providing training classes on the download process was helpful to our patrons at the beginning of our service.
- We have been working very hard on a way to have physical ebook readers out for patrons to get their hands on, download a book with library card, and use. We are having to build our own display shelving for a Kindle, iPad, Nook, and Sony Reader. That has been difficult.
- We have had an amazing growth in demand and lots of new members in our OverDrive consortium, both of which make it hard to find available to check out ebooks.
- We have seen an increase in circulation for the ebooks since we began our collection in May 2010. Started with a small collection, has grown slowly to include childrens', teens, and adult titles. I expect circulation to at least double for ebooks this year. Staff are answering several reference questions related to our ebook collections a day.
- We just began offering eBooks 9 months ago. It's a crazy ride, but we're enjoying it!
- We just joined the Ohio ebook project in March of this year, so it is relatively new to our patrons. It seems like usage was higher at the beginning of the service and has dropped off. I am not sure why, but have heard complaints from patrons that the books aren't available when they want them and then if they put holds on, they all come at the same time and they can't read them in the 2 week period allowed before they disappear and they have to wait to get the title again.
- We just started this service in 02/2011 and our clients are loving it. In fact our community held a benefit to provide funds for our entry into a consortium for ebooks.
- We know we must enter this market soon. Increasing requests from patrons mandate this. Budgeting for yet another format is tough for us.
- We purchased ebooks with a grant for FY 2010-11. In 2011-12, they will be purchased from our media budget. They have been very popular.

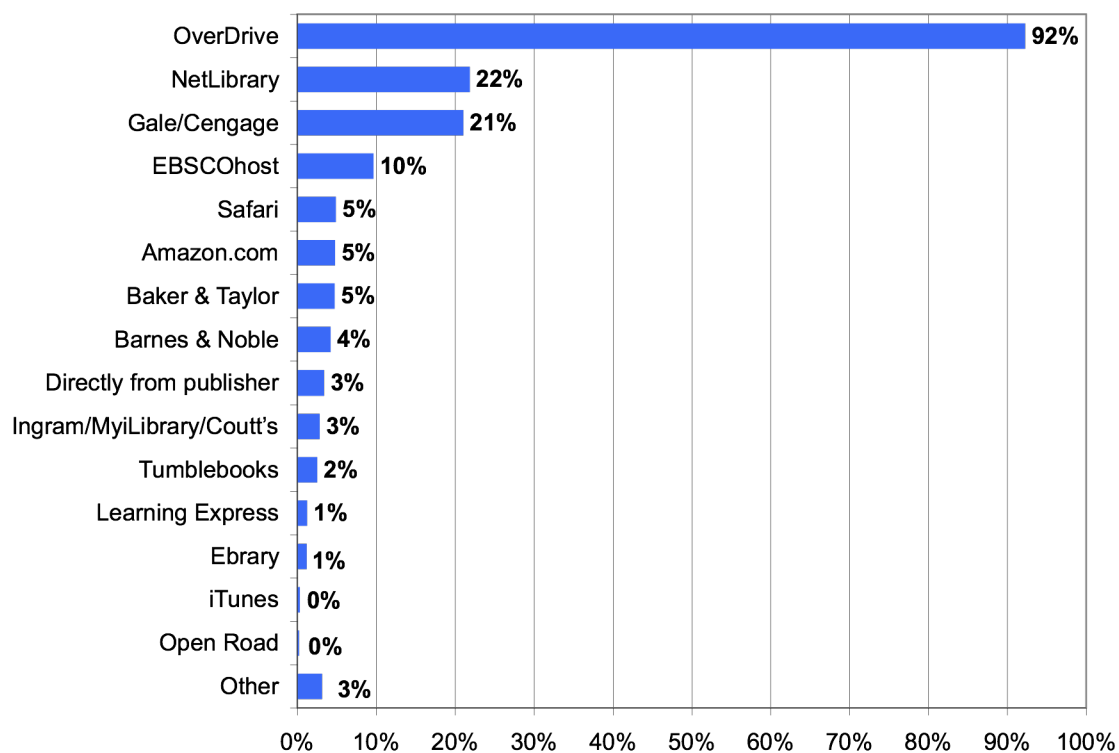
- We signed a contract with OverDrive in the spring of 2011. We tried to ask them if we could join a current consortium or start our own and they said NO. We will be interested in exploring any new start ups that provide popular ebook titles.
- We simply cannot keep up with customer demand!
- We use Overdrive for adults, and there are serious issues with ease of use. It is very difficult for members to figure out how to download onto Nooks, for example. It's not intuitive and requires a PC as a go-between and download of Adobe Digital Editions. Adobe Digital Editions requires a free account, like iTunes. This is too complex to for the person used to instant download from the Nook store. A plus is the apps OverDrive offers, but the Android app doesn't have the same functionality as the iPhone/iPad app. In particular, you cannot limit searches by format when searching a subject—so a search of mystery gives audio and ebook titles, which is overwhelming and less than helpful. The youth ebook products are much better. The pricing is reasonable with a subscription model and simultaneous, unlimited use. This makes the ebooks in Tumblebooks and Sylvan-Dell much more accessible to our members. In my opinion, the publishers are killing the goose whose laying golden eggs by being so restrictive with ebooks and libraries. The HarperCollins 26-circs model is too restrictive; how about something like a year's lease? A major problem we have in buying access to ebooks is that they are leased. Our primary pot of "book money" comes from our city's Capital Improvement Projects funds, which requires purchase of physical assets that will be owned for a minimum amount of time (3 years).
- We very recently began offering ebooks. I am very surprised at how easily customers took to them. There have been very few questions; I think the current crop of users are people who already are very familiar with their devices and know how to make them do what they want.
- We were behind the curve by a year on this one. Request ballooned at end of 2010 and we only managed to get everything online April 2011. I'd say we were a year late.
- We were surprised by the tremendous surge of interest after Christmas 2010!
- We would love *Library Journal* to do some info on best practices of other libraries.
- When a user selects to take a print over the e-book version it is usually because of the wait time. They like to know how far down the wait list they are and a projected wait time. Also, Clevnet only allows a 2 day pick up window before the title moves on so many orders are cancelled before someone who has reserved the item knows it's gone.

5. LIBRARIES AND EBOOK VENDORS

Vendors Patronized and Preferred

OverDrive is by far the top vendor patronized by libraries for ebooks; 92% of public libraries buy through OverDrive, up from 77% last year. A very distant second is NetLibrary at 22% (down from 38%), and Gale/Cengage 21% (unchanged from last year). (For clarity, we did not include 3M as an option because they had not yet launched Cloud Library product into the active marketplace at the time this survey was fielded. We only included 2011 survey data in Figure 48.)

Figure 48. Q44: From which vendor(s) does your library purchase ebooks? —All public libraries (multiple responses permitted)

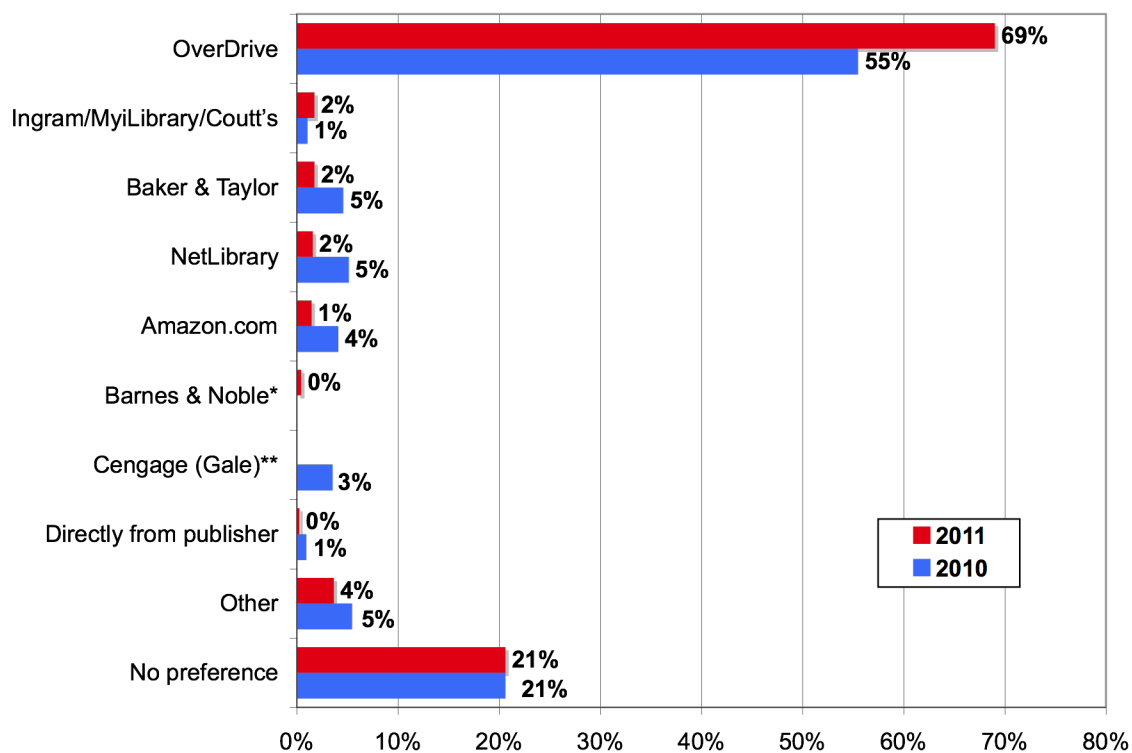


**Table 44. Q44: From which vendor(s) does your library purchase ebooks?
—Public libraries by population served and materials budget (multiple responses permitted)**

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
OverDrive	78%	73%	78%	90%	61%	73%	76%	94%
NetLibrary (EBSCO)	20%	43%	40%	50%	22%	39%	36%	46%
Cengage (Gale)	17%	19%	21%	43%	17%	19%	22%	31%
Amazon.com	9%	9%	6%	0%	17%	10%	4%	0%
Baker & Taylor	0%	8%	6%	10%	4%	9%	1%	6%
Directly from publisher	6%	5%	4%	3%	13%	4%	6%	2%
MyiLibrary (Ingram)	0%	4%	4%	10%	4%	3%	4%	6%
Safari	4%	3%	4%	13%	0%	4%	3%	12%
Ebrary	2%	1%	3%	0%	0%	4%	1%	0%
iTunes	4%	0%	1%	0%	0%	4%	0%	0%
Audible.com	2%	1%	0%	0%	0%	3%	0%	0%
Other	15%	8%	7%	7%	13%	10%	10%	6%

When asked a follow-up question about the vendor that libraries *prefer* to work with, OverDrive was the only vendor with any significant response (69%, up from 55% last year). One-fifth (21%, unchanged from last year) said “no preference.”

Figure 49. Q45: Which is your preferred ebook vendor? —All public libraries (only one response permitted)



*Added to 2011 survey.

**Included in 2010 survey only.

The largest libraries still overwhelmingly prefer OverDrive (74% versus 59% of the smaller libraries), while the smallest libraries are the most likely to express no preference.

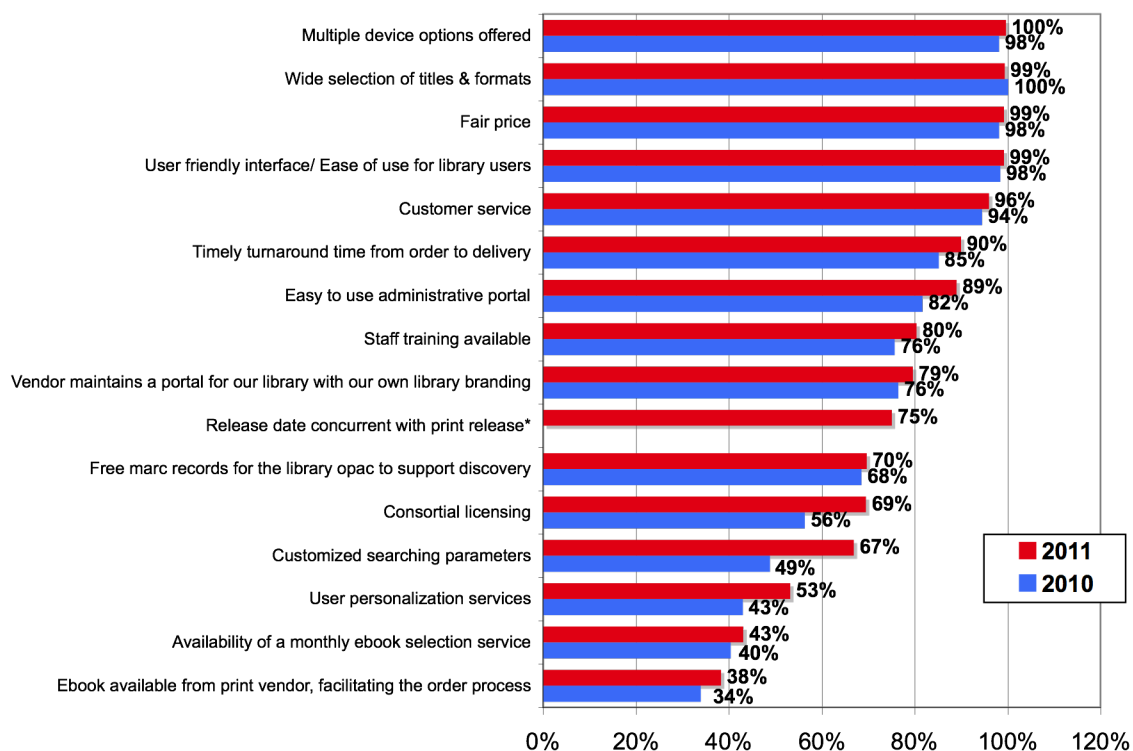
Table 45. Q45: Which is your preferred ebook vendor? —Public libraries by population served and materials budget (only one response permitted)

	Population Served				Materials Budget			
	< 25,000	25K–99K	100K–499K	500K+	<\$50K	\$50–\$249K	\$250–\$999K	\$1 Mil+
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%
2010								
OverDrive	56%	53%	54%	80%	42%	55%	54%	71%
NetLibrary (EBSCO)	2%	9%	4%	0%	0%	8%	6%	2%
Baker & Taylor	0%	5%	7%	0%	0%	4%	1%	8%
Amazon.com	11%	4%	1%	0%	13%	4%	6%	0%
Cengage (Gale)	2%	3%	6%	0%	0%	1%	7%	2%
Directly from publisher	2%	1%	0%	0%	0%	3%	0%	0%
MyiLibrary (Ingram)	0%	0%	1%	0%	4%	0%	0%	0%
Audible.com	0%	0%	0%	0%	0%	0%	0%	0%
Ebrary	0%	0%	0%	0%	0%	0%	0%	0%
iTunes	0%	0%	0%	0%	0%	0%	0%	0%
Safari	0%	0%	0%	0%	0%	0%	0%	0%
Other	5%	7%	4%	3%	0%	8%	6%	4%
No preference	22%	18%	23%	17%	42%	18%	21%	13%

Important Attributes

On our questionnaire, we asked public libraries to rate the importance of a variety of attributes when considering an ebook vendor. Not unexpectedly, the most vitally important attributes are a mixture of multiple device support, ease of use, and pricing. The top item—selected by all of our public library respondents, was “multiple device options offered.” This was up two percentage points from last year’s survey. A close second is a three-way tie at 99% among: last year’s number one, “wide selection of titles and formats” (down one percentage point); “fair price” (up one percentage point); and “user-friendly interface.” None of these attributes have become less important.

Figure 50. Q36: Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) —All public libraries



*Added to 2011 survey.

**Included on 2010 survey only.

Table 46. Q36: Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important) —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+
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%
2010								
Wide selection of titles & formats	100%	100%	100%	100%	100%	100%	100%	100%
Ease of use for library users (library card authentication)	98%	100%	97%	100%	100%	99%	97%	100%
Multiple device options offered	94%	97%	100%	100%	91%	96%	100%	100%
Fair price	96%	99%	97%	100%	100%	97%	100%	94%
Customer service	92%	96%	94%	93%	96%	93%	96%	92%
Timely turnaround time from order to delivery	72%	83%	92%	87%	87%	75%	88%	88%
Easy to use administrative portal	85%	81%	81%	87%	82%	86%	77%	86%
Vendor maintains a portal for our library with our own library branding	63%	80%	80%	83%	62%	75%	78%	83%
Staff training available	77%	71%	79%	80%	83%	74%	76%	77%
Free MARC records for	62%	70%	69%	83%	59%	69%	74%	69%

	Population Served				Materials Budget			
	< 25,000	25K– 99K	100K– 499K	500K+	<\$50K	\$50– \$249K	\$250– \$999K	\$1 Mil+
the library OPAC to support discovery								
Consortial licensing	70%	73%	45%	25%	72%	69%	52%	37%
Customized searching parameters	44%	57%	48%	48%	36%	51%	52%	49%
User personalization services	35%	44%	43%	50%	43%	38%	52%	41%
Availability of a monthly ebook selection service	43%	42%	39%	39%	43%	41%	45%	39%
Ebook available from print vendor, facilitating the order process	36%	41%	32%	20%	52%	34%	37%	22%

General Conclusions

OverDrive is currently the most common ebook vendor in public libraries. However, as the verbatim comments below (and elsewhere in this report) show, libraries have mixed feelings about OverDrive.⁴ The announcement that OverDrive would support the Kindle was met with overwhelming enthusiasm. Naturally, there was some skepticism and an “I’ll believe it when I see it” attitude, but generally library respondents feel that this will help make the ebook experience in their libraries a far more positive one.

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. The ebook market is still relatively new—at least for most users—and as such it is a fragile one. The demand for electronic content is increasing. There is a basic law for any new technology: it must provide a better experience for the user than that which it is intended to replace or supplement.

Ebooks should not be harder to borrow or read than printed books, and publishers need to heed this. 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.

⁴ Only a few as extreme as the Kansas State Library, which took on OverDrive in recent contract negotiations. See Michael Kelley, “Kansas State Librarian Goes Eyeball to Eyeball with OverDrive in Contract Talks,” *Library Journal*, Apr 6, 2011, http://www.libraryjournal.com/lj/home/890089-264/kansas_state_librarian_goes_eyeball.html.csp.

In Their Own Words...

Earlier this year, it was announced that OverDrive and Amazon have entered into an agreement that would allow Kindle users to download OverDrive titles. On this survey, we asked our respondents to weigh in on this agreement. This section provides a sampling of the write-in responses we received (lightly edited).

- !!!!!
- A device specific file purchase will require careful budget consideration while an epub file can be used on many devices. I will more likely purchase the file type that allows the most access by different devices.
- A lot of patrons who were annoyed that they could not download library ebooks to their Kindles will be pleased.
- A welcome and exciting development.
- Ability to download to Kindle is one of our top requests. Our patrons have been happy to hear this news and we are looking forward to serving our patrons better with this change.
- About time!
- Anticipating increased circulation.
- Anything that makes e-reader devices, libraries, and book lovers come together is a good thing.
- As current customers of Overdrive (via the TLN consortium) we are pleased. Though, ask us again next year when our contract comes up for renewal.
- Awesome!
- Excellent progress, but took a ridiculous amount of time to accomplish. Many people were given or bought Kindles thinking they would work with library ebooks and were profoundly disappointed and unhappy that they weren't compatible.
- Excited but worried about having enough ebooks; file type and DRM issues and generally, how difficult downloads are anyway.
- Excited for the announcement, but apprehensive because there is always a “gotcha” to OverDrive’s new features. We will also have to update our trainings for the Kindle users.
- Extremely happy not to have to tell Kindle users that they are out of luck
- Finally
- Fine, but OverDrive can barely handle the demand as it is—at holiday time the service was glacially slow, and I’d expect it to be worse when the Kindles start participating.
- Great, but our library can’t afford OverDrive.

- Happy for our patrons with Kindles, but a little worried what this will actually entail.
- I don't trust Amazon, but my patrons who have Kindles seem happy about it.
- I hope they hurry!
- I'll believe it when I see it.
- Meh. OverDrive already has so many limitations, can't see a huge improvement.
- Mixed. It's great that Kindle owners will now be able to access library materials. However, Amazon is going to have access to a LOT of information about library users even anonymized that is pretty valuable.
- Obviously, this is exciting news. But I worry about relying too heavily on OverDrive.
- Our library users would be happy. There were many Moms who received Kindles for Mother's Day and wanted to download library e-books. They were bummed.
- That it has taken them a long time to work out a deal, and I'm hoping that Kindles can play as well with OverDrive as Nooks and other ereaders do.
- The OD/Kindle announcement has great potential, but it will depend on how it is implemented. If users have to pick which format before they are at the checkout or download stage, it will be yet another hoop that could scare off people.
- There is definitely a need for circulating Kindle format books. Amazon's tendency to over-DRM concerns me, though.
- Thrilled!
- Very excited and hoping Adobe Digital Editions is NOT part of the downloading process!
- Waiting to see what the exact agreement includes, but it should add to our circulation.
- want to hear the details—sounds good.
- Will be nice to say to patrons that the Amazon/Kindle is now committed to working with libraries and they will be able to read our digital library books.
- Will increase usage of library downloads dramatically. Positive for libraries, assuming we can keep up with demand.

APPENDIX A: 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.

An e-mail invitation was sent to 38,300 *Library Journal* and *School Library Journal* newsletters subscribers on May 6, 2011, with a reminder to non-responders on June 24 and July 11. A survey link was advertised in *Library Journal* and *School Library Journal* newsletters. A drawing for two Nook Colors and four complimentary seats at the Library Journal/School Library Journal Virtual ebook Summit held on October 12, 2011 (VEBS II) were offered as incentive to reply.

The survey closed July 31, 2011 with 1,053 total public library respondents. The survey was developed, programmed, hosted and tabulated in-house by Library Journal. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. public libraries only. The public library data was weighted to represent the PLDS breakdown of libraries in the U.S. by population served.

The 2010 data used for comparison was based on 781 U.S. public libraries.

Public Library ebook Questionnaire

1. What is the zip code/postal code at your library's location? _____

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
- ☐ Main branch of a multi-branch system/district
- ☐ Branch of a multi-branch system/district
- ☐ Library system or district administrative offices
- ☐ Other (Specify) _____

5. What size is the population served by your library?

- ☐ < 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
- ☐ \$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

In the following questions, the term 'ebook' refers to an electronic copy of a book that is read on a device or a computer, not listened to as in an audiobook.

7. How many ebooks does your library currently have access to or own?

- ☐ None (If None, skip to Q48)
- ☐ Under 25
- ☐ 25 to 49
- ☐ 50 to 99
- ☐ 100 to 249
- ☐ 250 to 499
- ☐ 500 to 749
- ☐ 750 to 999
- ☐ 1,000 to 2,499
- ☐ 2,500 or more, specify # _____

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

- ☐ Yes, dramatic increase
- ☐ Yes, slight increase
- ☐ No, request level is unchanged
- ☐ No, we receive no requests for ebooks

9. 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
- ☐ Other (specify) _____

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

- ☐ Bestsellers
- ☐ Classics
- ☐ General fiction
- ☐ Mystery/Suspense
- ☐ Thriller
- ☐ Romance
- ☐ Science Fiction
- ☐ Fantasy
- ☐ Young adult
- ☐ Children's
- ☐ Other (Specify) _____

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

- ☐ General reference
- ☐ Biography/Memoirs
- ☐ Humor
- ☐ Computers/Technology
- ☐ History
- ☐ Political/Current events
- ☐ Business/Careers
- ☐ Medicine/Health
- ☐ Travel
- ☐ Cooking
- ☐ Home decorating & Gardening
- ☐ How-to
- ☐ Self-help/Psychology
- ☐ Religion/Philosophy
- ☐ Other (Specify) _____

12. 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

13. 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) _____

☐ Don't know

14. What ebook usage license model is currently employed at your library? Check all that apply.

- ☐ Single ebook use at a time
- ☐ Multiple ebook usage, but not unlimited. Specify # _____
- ☐ Unlimited access/simultaneous use
- ☐ Other (specify) _____
- ☐ Don't know

15. What is the circulation interval for ebooks at your library? Check all that apply

- ☐ Ebooks do not circulate – for in-library use only
- ☐ Less than 7 days
- ☐ 7 days
- ☐ 14 days
- ☐ 21 days
- ☐ 28 days
- ☐ User specified
- ☐ Other _____

16. Do you allow library customers to place holds on downloadable ebooks?

- ☐ Yes
- ☐ No
- ☐ Sometimes

17. (If yes) Do you ever purchase extra digital copies to fulfill ebook holds?

- ☐ Yes
- ☐ No

18. (If yes) Do you have a set holds-to-copy ratio for ebooks?

- ☐ Yes, please specify your holds-to-copy ratio _____
- ☐ No, not for ebooks

19. What was your ebook circulation in the last two years?

FY 2009 circulation _____

FY 2010 circulation _____

20. Compared to last year, do you expect this year's circulation of ebook titles will increase, stay the same or decrease?

- ☐ Increase, by what percentage? _____%
- ☐ Stay the same
- ☐ Decrease, by what percentage? _____%

21. 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)
- ☐ Other portable device (e.g., iPad, smartphone, other tablet)
- ☐ Library computer
- ☐ Other (specify) _____
- ☐ Don't know

22. 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

23. Has your library offered public training sessions on how to download content to ereading devices?

- ☐ Yes
- ☐ No

24. Does your library circulate preloaded ereading devices?

- ☐ Yes, for in-library use only
- ☐ Yes, for take home use
- ☐ Not currently, but considering
- ☐ No

25. (If yes) How many preloaded ereading devices does your library maintain?

26. (If yes) Which preloaded ereading device(s) does your library circulate? Check all that apply.

- ☐ Kindle
- ☐ Sony Reader
- ☐ Nook
- ☐ iPad
- ☐ Other _____

27. What are your feelings about the recently announced OverDrive/Kindle agreement (Kindle owners will be able to download OverDrive titles)?

28. How does your library market the availability of ebooks in your library? Check all that apply.

- ☐ General online catalog/OPAC
- ☐ Digital collection link on website
- ☐ Ads for ebooks posted in library/Bookmarks/Fliers
- ☐ Library newsletter
- ☐ Social networking (e.g., Facebook, Twitter, etc.)
- ☐ Word of mouth
- ☐ Other (specify) _____
- ☐ We do not market ebooks specifically

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

- ☐ Difficult to find/discover
- ☐ Difficult to read onscreen/online
- ☐ Long wait times for ebooks
- ☐ Digital rights management issues
- ☐ Incompatibility with preferred reading device (e.g. Kindle)
- ☐ Limited access to e-reading devices
- ☐ Users prefer print
- ☐ In demand titles not available for libraries
- ☐ Lack of training
- ☐ Complex downloading process
- ☐ Unaware of ebook availability
- ☐ Ebook titles not available concurrent with print release
- ☐ Other (specify) _____

30. Do you feel that by offering ebooks you have opened your library to new users who didn't use the library before?

- ☐ Yes
- ☐ No
- ☐ Don't know

31. Have you heard of customers who only want ebooks and decline to borrow print editions?

- ☐ Yes
- ☐ No

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

- ☐ Often
- ☐ Sometimes
- ☐ Rarely
- ☐ Never

33. Is your library part of a consortium license program for its ebook collection?

- ☐ Yes
- ☐ We used to be, but no longer. Why did you leave the consortium?

- ☐ No, but plan to in the future
- ☐ No
- ☐ Don't know

34. [if yes] Does your library also buy ebooks independently?

- ☐ Yes
- ☐ No

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

- ☐ Yes
- ☐ No (If No, skip to Q47)

36. What factors influence your decision to purchase an 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
- ☐ Less costly than print editions
- ☐ Other (Please specify) _____

37. What do you feel would be a fair and realistic model for licensing ebooks?**Check all that apply.**

- ☐ Lending cap model (e.g., 26 circs HarperCollins model)
- ☐ Maximum access (multiple users allowed simultaneous access)
- ☐ Opportunity to license for varying # of circulations
- ☐ Unlimited circs using one reader/one book model
- ☐ 1 year interval
- ☐ 2 year interval
- ☐ Patron driven acquisition model (Multiple titles available, purchase based on holds)
- ☐ Other, specify _____

38. 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
- ☐ Subscription
- ☐ Pay-per-use
- ☐ Bundled with other content
- ☐ User-driven acquisition
- ☐ Upfront purchase with maintenance fee
- ☐ Upfront purchase with update fee
- ☐ License with set # circs model
- ☐ Concurrent use/access
- ☐ Other (specify) _____
- ☐ Don't know

39. How do you generally find and learn about ebooks? Check all that apply.

- ☐ Requests from library users
- ☐ Library colleagues/district specialists
- ☐ Professional level journals (e.g., Library Journal)
- ☐ Consumer media
- ☐ Blogs
- ☐ Inclusion in content packages/bundles
- ☐ Vendor websites
- ☐ Webcasts/Webinars

- ☐ Publishers' marketing materials (e.g., catalog, ad, etc.)
☐ Conferences/Tradeshows
☐ Other (Specify) _____

40. How are ebooks represented in your library's materials budget?

- ☐ Separate line/Budget for ebooks only
☐ Separate line/Budget for ALL downloadables (ebooks, downloadable video & music, eaudiobooks)
☐ Included in electronic resources budget
☐ Included in print resources budget
☐ Included in multimedia budget (with audiobooks, CDs, DVDs)
☐ No set budget, money comes from special grants, friends group, etc.
☐ No set budget, ebooks come from state level or consortium
☐ Other (specify) _____

41. 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%	More than 10%
Last year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In 5 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

42. 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 \$200
☐ \$200 - \$499
☐ \$500 - \$999
☐ \$1,000 - \$2,499
☐ \$2,500 - \$4,999
☐ \$5,000 or more (specify) \$ _____
☐ Don't know

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

- ☐ Yes ☐ No

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

45. Which is your preferred ebook vendor?

	Q44. ebook vendor(s) you purchase from	Q45. One Preferred ebook vendor
Amazon	<input type="checkbox"/>	<input type="checkbox"/>
Baker & Taylor	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble	<input type="checkbox"/>	<input type="checkbox"/>
Ebrary	<input type="checkbox"/>	<input type="checkbox"/>
EBSCOhost	<input type="checkbox"/>	<input type="checkbox"/>
Gale/Cengage	<input type="checkbox"/>	<input type="checkbox"/>
Ingram/MyiLibrary/Coutt's	<input type="checkbox"/>	<input type="checkbox"/>
iTunes	<input type="checkbox"/>	<input type="checkbox"/>
NetLibrary	<input type="checkbox"/>	<input type="checkbox"/>
Open Road	<input type="checkbox"/>	<input type="checkbox"/>
OverDrive	<input type="checkbox"/>	<input type="checkbox"/>
Safari	<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"/>

46. 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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multiple device options offered (iPad, Sony Reader, Smartphone, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy to use administrative portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendor maintains a portal for our library with our own library branding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wide selection of titles & formats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fair price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free MARC records for the library OPAC to support discovery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timely turnaround time from order to delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff training available	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ebook available from print vendor, facilitating the order process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of a monthly ebook selection service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User personalization services (i.e., saved preferences)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customized searching parameters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Release date concurrent with print release	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consortial licensing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

47. If you have any comments about ebooks in your library, please write them below.

**FOR THOSE WHO DO NOT CURRENTLY OFFER EBOOKS, FUTURE PLANS
QUESTIONS**

48. 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
- ☐ Other (specify) _____

49. 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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