2014

EBOOK USAGE in U.S. Public Libraries

FIFTH ANNUAL SURVEY

ILLUSTRATION BY NEWARTGRAPHICS

R E S E A R C H
LIBRARYJOURNAL / School Library Journal

Survey of Ebook Usage in U.S. Public Libraries

EXECUTIVE SUMMARY

Since *Library Journal* launched an annual survey of ereading trends in 2010, we have seen ebooks gain traction both among the general public and in public libraries. If it appears from the current survey that much of the enthusiasm for ebooks has cooled, it is only because they have become less of a novelty and more mainstream.

Back in 2010, just before we launched our first survey, Apple introduced the iPad, and initial reviews were mixed, particularly in the context of ebooks. At the time, the Amazon Kindle—the black-and-white reflective E Ink version—dominated, and experts felt that ebook reading public would not accept a return to a backlit display. After all, the reflective "electronic paper" displays of the first generation ereaders—which also included the Sony Reader, Barnes & Noble NOOK, Kobo eReader, and others—were said to emulate paper. "Who wants to read on a computer screen?" was the dominant feeling up to that time.

However, almost everywhere these days you'll notice that people seem to be doing nothing *but* reading on screens—namely, smartphone displays. So it really is no shocker that color backlit displays have returned to become the standard for ereading, among other functions.

Similarly, we should not be surprised that the top ereader choice among public library patrons is the tablet, which surpasses the "dedicated ereader" for the first time in our survey. Of course, the two categories are no longer mutually exclusive. Users of tablets and smartphones are not just reading books on them, they're also streaming movies and TV shows, listening to music, playing games, and often spending inordinate amounts of time on social media like Facebook.

What this means—and we have seen some indication of this in the comments from this year's survey respondents—is that libraries may become a focal point for all this content. Libraries already lend music CDs, audiobooks, and DVDs, in addition to print books, and the push is on to offer streaming access to these media forms.[1] A library's need to invest in its ability to offer these things will likely come at the expense of other budget items—probably print, but not entirely.

Speaking of print, where *does* that leave the traditional printed book? As this year's survey found, rumors of print's death have been greatly exaggerated, to coin a phrase. Libraries still need to offer print collections as many patrons continue to prefer print. Anecdotal responses to this survey indicate that for some library users, ebooks were an experiment that didn't pan out and, after an initial trial period, users went back to print. This underscores the fact that libraries, to serve the public as best they can, need to offer a variety of formats at the risk of

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[1] Actually, the public library may become the *only* source for these legacy formats. Netflix—which invented the DVD-by-mail service that killed Blockbuster and other bricks-and-mortar video rental stores—has made no bones about its desire to get out of the physical format rental business and solely offer streaming. Where does that leave users who still want to rent physical media and/or are unable to stream movies and TV shows? Answer: the library.

alienating some users. Managing this with the typical library budget is not without its challenges.

Much of librarians' dissatisfaction with vendors and publishers has abated—or is at least less vitriolic than it has been in the past. Some dissatisfaction remains (mostly with pricing), but generally speaking libraries have found ways to make ebooks work, and patrons also seem to be fairly satisfied with the ebook experience. How some of the public feuds—such as that between Hachette and Amazon—will affect books in general and ebooks in particular, remains to be seen. Since the Kindle is firmly ensconced in the ereading space, whatever Amazon does will affect ereading, especially among public libraries. Another unknown is how ebook lending services like KindleUnlimited and Oyster.com, which provide unlimited ebook lending for a flat monthly fee, will affect libraries. Stay tuned.

Pervasive Ebook Collections

In 2014, 95% of libraries indicated that they offer ebooks to users, up from 89% in both 2012 and 2013. Twenty-nine percent of those that do not currently offer ebooks say they definitely will add them in the next year. The biggest impediment to adding or expanding ebook offerings is money. Lack of interest in ebooks remains somewhat of a factor, but it is far and away economics that is keeping ebook adoption short of 100% penetration.

% of public libraries *offering ebooks*	*2010*	*2011*	*2012*	*2013*	*2014*
	72%	82%	89%	89%	95%

"Access to digital materials and to ereader devices are two of many services we provide. Many patrons prefer print and still others prefer audio. We don't feel threatened by the growing demand for digital materials; rather it adds another dimension to the work we do."

The size of public library ebook collections continues to swell. In 2014, the median number of ebooks that libraries offer exceeds 10,000 titles, an increase of nearly 1200% since 2010.

Ebook collections	*2010*	*2011*	*2012*	*2013*	*2014*
Median # of ebooks	813	1,750	5,080	7,380	10,484

Some Readers Demand Ebooks, Some Don't

Demand for ebooks peaked in 2012, and since then has tapered off but still remains high. Although 91% of public libraries reported an increase in demand for ebooks this year, it is more "slight" than "dramatic." By now many patrons have tried ebooks and made the decision whether they prefer digital or print, or both.

Experienced increased demand for ebooks (Net "Dramatic" and "slight")	2011	2012	2013	2014
% of all public libraries	97%	98%	89%	91%

Increases in Circulation Slow

Respondents reported a median circulation of 13,418 ebooks in fiscal year 2013. Median ebook circulation increased eleven percent from 2012 to 2013 and more than five-fold since 2010.

Ebook circulation	FY 2010	FY 2011	FY 2012	FY 2013
Median ebook circulation	2,600	5,000	12,139	13,418

The overall change in circulation anticipated for the current fiscal year is +25%. The data indicate that while ebooks are still growing in popularity, the trend is toward a slowing of that growth.

Anticipated change in ebook circulation	2011	2012	2013	2014
% change in ebook circulation	+108%	+67%	+39%	+25%

Most respondents indicated that their library's ebook titles are accessed one user at a time (91%), rather than simultaneously by multiple users. Just as with print books, libraries allow users to place holds on ebooks, and they purchase additional copies to fulfill holds on high-demand titles. The average holds-to-copy ratio for ebooks is 6:1, a figure that has not changed from last year.

Ebook Collections and Categories

Currently, three-quarters (74%) of public libraries' ebook collections are fiction titles, while 26% are nonfiction titles. In contrast, the fiction/nonfiction split among *print* books is 57% fiction vs. 43% nonfiction.

Adult titles account for 71% of public libraries' collections, children's ebooks account for 15% and young adult ebooks represent 14%. Public libraries continue to expand their children's and young adult ebook collections. In our complementary school library ebook study, we found anecdotal evidence to suggest that school libraries often rely on local public libraries to take up the slack and offer ebook collections (and even ereaders) in those cases when schools are unable to.

Membership in a consortium is one way that public libraries can gain access to a larger breadth of ebook titles. Almost two-thirds (64%) of libraries said they currently were consortia members, which has held fairly steady on average over the past three years.

"We struggle with managing selection, staying on top of the various business models employed by publishers and vendors, and getting our collection front and center with customers. This sounds like complaining and it's not: we do like acquiring content in formats that an increasing number of customers value without having to physically process materials."

One-third of respondents supplement their primary ebook selections by offering backlist ebooks, 20% of respondents said they also offer ebooks from small or independent presses, and 14% currently offer ebook originals or self-published ebooks. Six out of ten (59%) offer none of these "alternative" ebooks.

Obstacles Persist

The most serious hindrances to the public's use of ebooks have shifted to basic lack of awareness and ease of use. Lack of popular titles available and limited ebook collections have become less of an issue in this survey, as all Big Five publishers now allow frontlist library ebook lending. Not to be overlooked, four out of ten libraries say "users prefer print," an all-time high.

"Generally, we find that the ebook and print book collections complement each other, with each feeding off the other. The e-audio service we recently purchased has been very well received so far. With the implementation of Common Core and finding that our collection needs help in these areas, we plan on moving more toward etitles in nonfiction for children and young adults to fill that need, particularly looking for a simultaneous user provider."

Forty-two percent of public librarians hear patrons voice the concern, "I need help downloading ebooks to my device," on a daily basis. There is a definite need for a more streamlined user experience, particularly one that respects patron privacy.

Ebook Budgets Are Rising, but More Slowly

In their last complete fiscal year, public libraries independently purchased or licensed a mean of 1,933 ebook volumes (median 565) and spent on average $57,342 (median $13,002) on them. If we divide one by the other, we can estimate a cost range of $23.01 to $29.66 per ebook. This is oversimplified, of course, as many titles have maximum usage restrictions and others are purported to cost up to three times the cost of the same title in print.

We project total spending on ebooks by U.S. public libraries to be nearly $113 million in the current fiscal year. Over the past four years, ebooks have grown from just under 2% of public libraries' materials budgets to more than 7%. Libraries expect ebook spending as a percentage of their total materials budget to double in five years' time (2019).

Population served	Ebook spending as a % of total materials budget (median %)					
	2010	*2011*	*2012*	*2013*	*2014*	*2019*
All public libraries	1.7%	3.5%	4.7%	6.1%	7.6%	14.0%
< 25,000	1.5%	1.9%	3.9%	3.9%	4.9%	10.5%
25,000–99,000	1.8%	3.8%	4.7%	6.4%	6.5%	13.2%
100,000–499,000	1.7%	3.5%	6.9%	7.4%	9.2%	16.8%
500,000+	1.9%	4.0%	6.9%	6.5%	9.5%	18.0%

A challenge for libraries lies in the expansion of ebook collections while continuing to maintain robust print collections and other services. Two-thirds of libraries have reallocated funding from elsewhere in their materials budgets to pay for ebooks. Reference materials took the biggest hit—58% identify the reallocation coming from the reference budget. Fifty-six percent reallocate from the print budget, and 8% say they take a little from all areas to pay for ebooks.

Providing ebooks sometimes has an impact on print collections: one-fifth (21%) of libraries said that they now buy fewer print books, although 71% said that ebooks had no influence on their print book purchasing.

> *"While ebooks are very popular, other electronic media such as streaming video and music are also becoming very popular, so we will have to really look at budget issues to satisfy all the econtent demand, not just ebooks."*

Tablets the Device of Choice

The popularity of dedicated ereaders with patrons is still high, but our research shows that tablets have quickly overtaken them to become the device of choice for readers.

Preferred ereading devices	2010	2011	2012	2013	2014
Tablet (e.g., iPad, Kindle Fire, Nexus)*	n/a	n/a	66%	82%	84%
Dedicated ebook reader (e.g., NOOK, Kindle)	52%	85%	90%	86%	78%
Smartphone or other mobile device*	36%	61%	41%	51%	48%
Personal laptop/Computer/Netbook	61%	53%	33%	33%	28%
Library computer	16%	4%	2%	4%	2%

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

Just under one-third of libraries have ereaders on hand for patrons' use, most often the mid to small size libraries. Fewer libraries are circulating ereaders, largely due to a growing prevalence of ereading devices among patrons. The Kindle has pulled ahead as the ereader of choice for libraries to circulate. Of the libraries that circulate ereaders, the average number of devices on hand is 19.

Only the largest libraries are substantially increasing their number of loaner ereaders available at this time. More than half of public libraries that circulate ereaders have no plans to acquire more devices. However, 17% say they have a need to replace broken tablets.

Of those libraries that offer devices, 42% provide them strictly for adults. Half offer some for teen use, and more than four out of ten also allow for children's use.

Sixty-one percent of public libraries have a different loan policy for their ereaders than for other circulating materials. Typically, those policies require the patron to sign a user agreement that spells out the loan period (which can differ from print books and ebooks), how to return the readers (i.e., not in the book drop), charges that will be assessed in the event of damage or loss, whether ebooks or other content can be downloaded by the user or if the library preloads them. It can also spell out other policies related to the specific ebook service being used (OverDrive, for example).

The cloud is forming, but slowly: 86% of libraries' ebooks are device-downloadable, while are 14% stored in and accessed from the cloud.

> *"Our users want an easier method for downloading ebooks; they get confused by all the formats and their different devices. Librarians want to have content from all publishers available, concurrent with print, without checkout limits/expirations and at a discount."*

Ebook Purchasing Terms and Vendors

The purchasing terms for ebooks continue to change. In 2014, the majority of libraries—68%—say they "license with a set number of circs," up from 62% last year and 24% two years ago. This model, introduced as a 26 loan cap model by HarperCollins, was vilified at that time by librarians and is now considered a standard pricing model. "Purchase with perpetual access" was cited by 52%, down from 58%. Patron-driven acquisition is at an all-time high of 31%.

In terms of vendors used, OverDrive continues to dominate the ebook space for libraries. More than nine out of ten libraries use OverDrive to some extent, and two-thirds preferred OverDrive over all other vendors. Nineteen percent of respondents had no preferred vendor.

> *"We like spreading our dollars among vendors to give OverDrive the nudge to develop better support for library staff."*

Conclusions

Ereading continues to grow, although it is plateauing as it simply becomes "the new normal." Ebook acceptance is high among the general public, but that said, print books remain desirable, and ebooks are more of a complement/supplement than a complete replacement. So collections and circulations will continue to climb, even if the overall growth rate isn't what it was during the great ebook buildout of the past five years.

The tension between publishers and libraries over ebooks has relaxed somewhat, owing to public libraries' acceptance, albeit reluctant, of licensing rather than owning ebooks and all Big Five publishers now making their frontlist titles available to libraries in ebook format.

INTRODUCTION

About the 2014 *Library Journal* Ebook Survey

Welcome to the fifth *Library Journal* survey of electronic book usage in U.S. public libraries. The present report is one of two that look at the current state of ebooks and their place in libraries. As always, our most recent survey reprises many questions from previous years' surveys, allowing us to track long-term trends more effectively, as we now have four or five data points to consider. We also tweak some other questions based on responses to past surveys or to better reflect changes in the market, so some data points may not be entirely consistent with past responses. There are also some brand new questions this year.

Once again, we invited survey respondents to answer open-ended questions that asked about public libraries' experience with ebooks in general and, in this survey, about their relationship with their primary, preferred ebook vendor. The answers generally reflected a very high comfort level with, and even enthusiasm for, ebooks, both among library staff and among library patrons. Sure, there are still some problems, and a few anti-ebook holdouts remain, but in general libraries and library staffs have completely integrated ebooks into their offerings and are simply getting on with it. As we always say, these verbatim responses are a useful lens through which to view the quantitative results of our survey. A selection of these responses can be found at the ends of Chapters 2, 3, 4, and 5.

How This Report Is Organized

If you have used past versions of our ebook usage surveys, much of what follows in the present report will seem familiar.

Data Presentation

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

In those cases where we have calculated averages, such as "average number of ebooks available," "average number of ereaders available," or "average amount spend on ebooks," we provide both a mean and a median. A *mean* is a simple average, or "the sum of a collection of numbers divided by the number of numbers in the collection."[2] A *median* is "the numerical value separating the higher half of a data sample, a population, or a probability distribution, from the lower half."[3] Medians are more useful than means when looking at datasets with outliers—that is, figures that are anomalously high or anomalously low.[4] For

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

some of the questions in this survey, there were very large outliers that skewed mean figures, so looking at median values gives us a better idea of what the reality is.

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

For geographical region, we grouped our survey sample into four general regions: Northeast, Midwest, West, and South (see Chapter 1 for which specific states are included in these regions). Geographical data can be helpful for vendors, publishers, or other companies seeking to identify where to focus sales, marketing, or even customer support efforts.

In last year's report, we sought to add a greater historical perspective, and we continue this in the current report. For questions that had appeared in at least three of the past five surveys, we have provided a "time series" chart to track trends over time.

Chapter Structure

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

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

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

Chapter 4 highlights budgets and purchasing terms. How much do public libraries spend on ebooks? Are ebooks taking a greater percentage of the budget pie? Are libraries cutting elsewhere to pay for them? On what purchasing terms do libraries buy? This chapter also looks at vendors—which vendors do libraries use, and which do they prefer?

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

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

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

For More Information

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

1. PROFILE OF RESPONDENTS

Who answered our questions? This section provides a basic demographic profile of the libraries that responded to our 2014 survey.

Type of Library

As the chart below shows, 41% of the public libraries responding to this questionnaire identified themselves as a "stand-alone, single-branch library," 28% identified themselves as the "central branch of a multi-branch system/district," 11% as a "branch of a multi-branch system/district," and 11% as a "library system or district administrative office."

Figure 1. Which of the following best describes your library?
% of public libraries, 2014
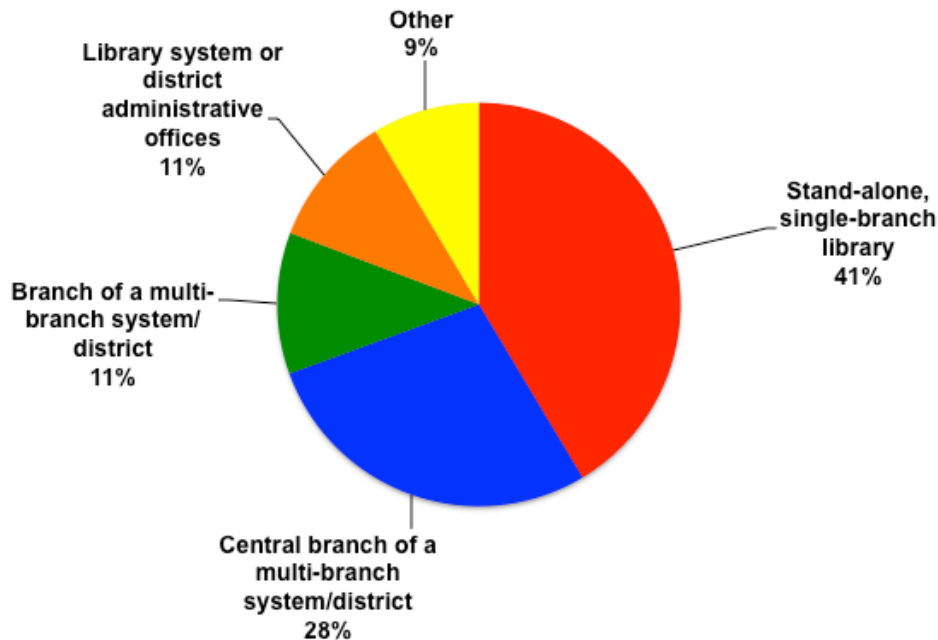
The table below breaks the data down by population served and region.

Table 1. Which of the following best describes your library?
% of public libraries by geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Stand-alone, single-branch library	79%	46%	5%	0%	49%	58%	26%	32%
Central branch of a multi-branch system/district	5%	28%	45%	52%	30%	22%	27%	30%
Branch of a multi-branch system/district	6%	8%	20%	13%	7%	7%	19%	14%
Library system or district administrative offices	0%	7%	23%	35%	6%	6%	15%	16%
Other	10%	10%	7%	0%	8%	7%	14%	8%

Population Served

Public libraries responding to our survey serve an average (mean) population of 147,238 (median 59,633).

Figure 2. What size is the population served by your library?
% of public libraries, 2014
Mean: 147,238
Median: 59,633
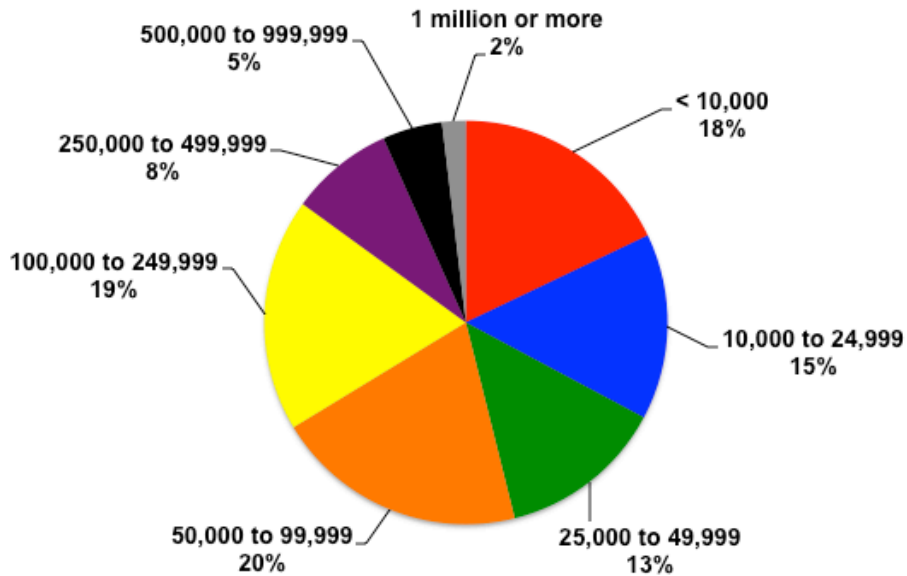
Table 2. What size is the population served by your library?
% of public libraries by geographic region, 2014

	Geographical Region			
	Midwest	*North-east*	*West*	*South*
< 10,000	22%	23%	14%	13%
10,000 to 24,999	16%	25%	9%	10%
25,000 to 49,999	16%	18%	10%	10%
50,000 to 99,999	22%	17%	16%	23%
100,000 to 249,999	15%	12%	21%	25%
250,000 to 499,999	6%	3%	14%	11%
500,000 to 999,999	3%	1%	13%	6%
1 million or more	0%	1%	5%	3%
Mean	101,632	75,866	260,831	181,867
Median	44,557	27,544	112,481	87,079

Urban, Suburban, or Rural

About one-half (48%) of the libraries included in this year's survey are located in suburban locations, 36% are in rural locations, and 24% are in urban locations. (Numbers add to more than 100%, as district offices and multi-branch libraries may serve more than one type of location.)

Figure 3. How would you describe your library's location?
% of public libraries, 2014
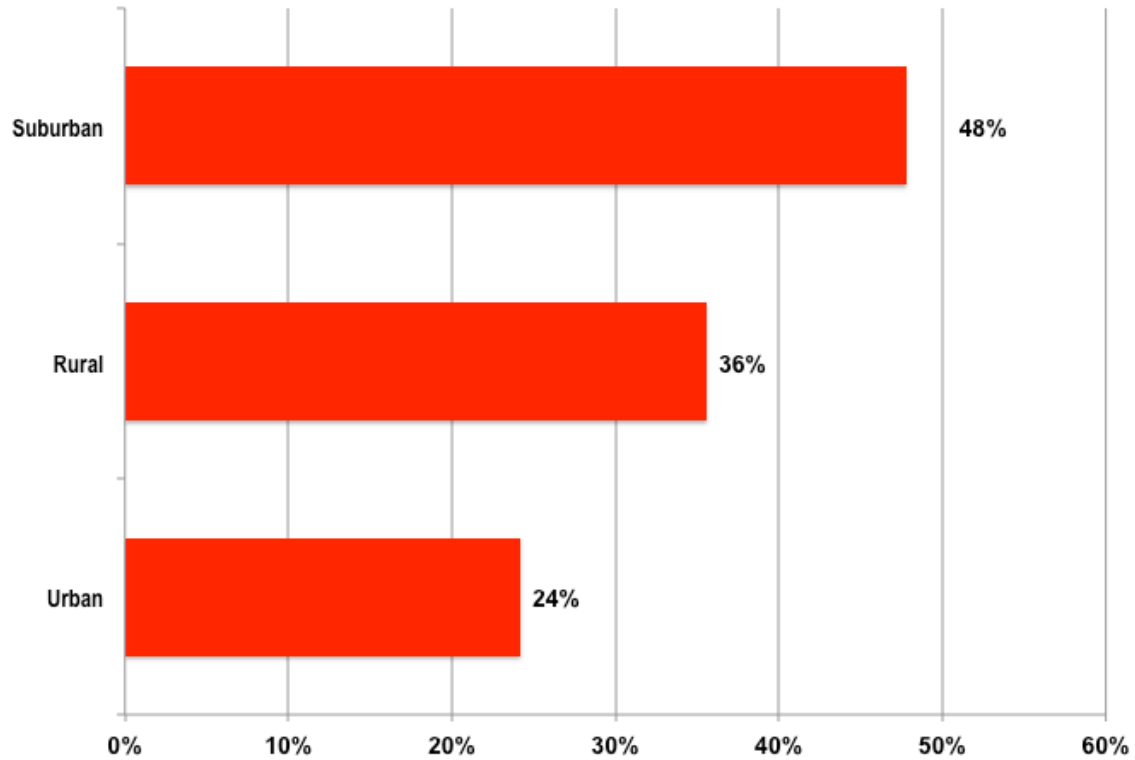
The following table breaks the public/private data down by population served and geographic region.

Table 3. How would you describe your library's location?
% of public libraries by population served and geographic region, 2014

|	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Urban	6%	14%	44%	80%	19%	18%	33%	29%
Suburban	33%	61%	54%	47%	49%	52%	48%	45%
Rural	65%	27%	13%	17%	42%	35%	28%	33%

Library Location

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

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

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

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

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

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

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

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

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

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

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

- Northeast: New England and Mid-Atlantic

- Midwest: East North Central and West North Central

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

- West: Mountain and Pacific

Figure 4. In which region of the country is your library located?
% of public libraries, 2014
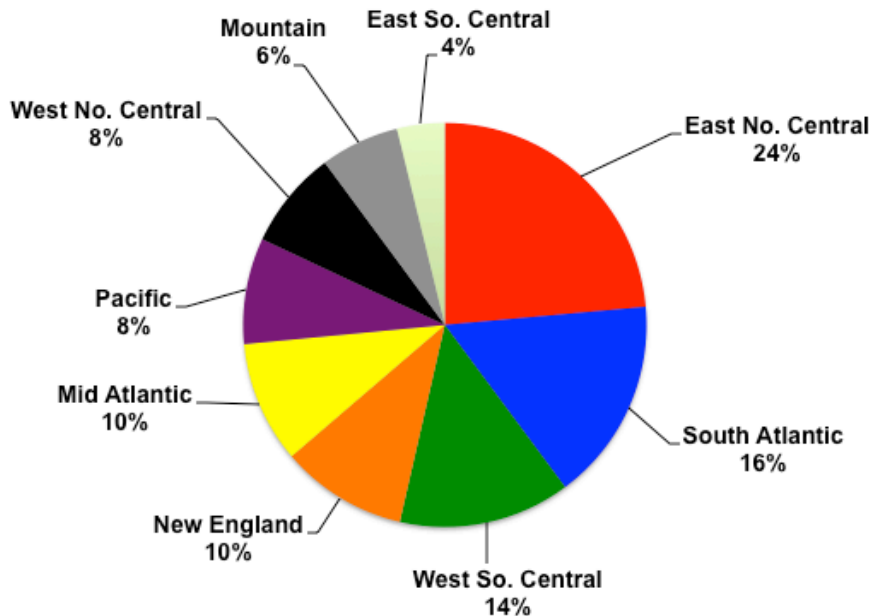
Looking at the four major geographical divisions, we see that this year, our sample skewed a little heavily toward South and the Midwest, and away from the West.

MIDWEST	31%
NORTHEAST	20%
WEST	15%
SOUTH	34%

Table 4. In which region of the country is your library located?
% of public libraries by population served, 2014

	Population Served			
	< 25,000	25,000-99,000	100,000-499,000	500,000+
East No. Central	29%	30%	13%	10%
South Atlantic	6%	15%	29%	23%
West So. Central	14%	13%	12%	19%
New England	20%	7%	4%	0%
Mid Atlantic	9%	15%	7%	6%
Pacific	6%	7%	10%	29%
West No. Central	7%	6%	12%	3%
Mountain	4%	5%	10%	10%
East So. Central	4%	3%	5%	0%
MIDWEST	36%	36%	25%	13%
NORTHEAST	29%	22%	11%	6%
WEST	10%	11%	19%	39%
SOUTH	24%	31%	45%	42%

Respondent Job Title/Ebook Recommendation Authority

How involved are our survey respondents in ebook purchasing and recommendation decisions in their libraries?

Job Title

One-third (33%) of the respondents to our survey gave their job title as "library director/assistant library director," with another 11% identifying themselves as "collection development/materials section librarian." The remainder included assorted librarian and managerial positions.

Figure 5. Which of the following comes closest to your job title?
% of public libraries, 2014
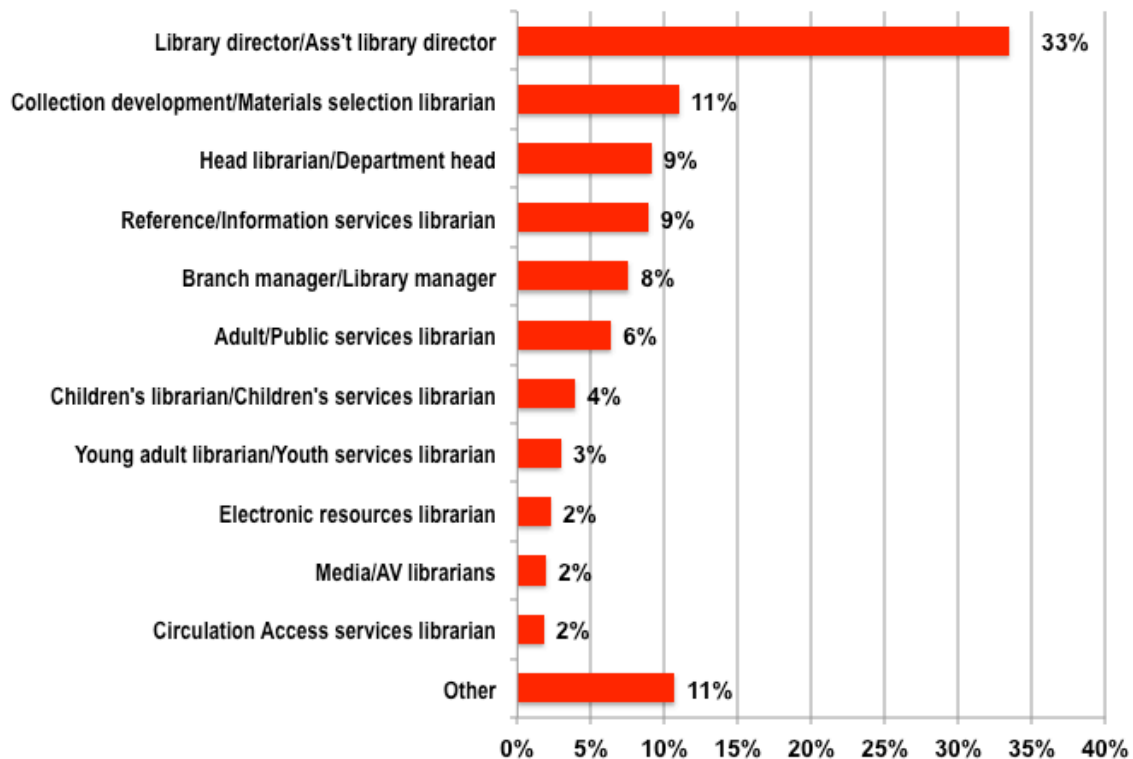
The table on the next page breaks the data down by population served and geographical region.

Table 5. Which of the following comes closest to your job title?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Library director/Ass't library director	59%	28%	17%	3%	38%	39%	20%	31%
Collection development/Materials selection librarian	1%	7%	21%	35%	11%	5%	12%	14%
Head librarian/Department head	5%	10%	11%	19%	9%	12%	11%	6%
Reference/Information services librarian	5%	10%	14%	0%	7%	15%	9%	7%
Branch manager/Library manager	6%	4%	13%	10%	6%	0%	14%	11%
Adult/Public services librarian	7%	9%	5%	6%	4%	8%	6%	8%
Children's librarian/Children's services librarian	4%	8%	0%	0%	3%	3%	5%	5%
Young adult librarian/Youth services librarian	4%	5%	0%	0%	3%	0%	4%	4%
Electronic resources librarian	1%	1%	5%	6%	1%	0%	5%	4%
Media/AV librarians	1%	2%	1%	3%	2%	2%	5%	1%
Circulation Access services librarian	1%	4%	0%	0%	2%	3%	1%	1%
Technical services librarian	1%	3%	0%	0%	1%	0%	0%	2%
Paralibrarian	1%	0%	1%	3%	0%	2%	3%	0%
Cataloging librarian	0%	2%	0%	0%	0%	1%	0%	1%
Other	5%	7%	12%	13%	12%	8%	6%	6%

Role in Ebook Decisions

Seven out of ten survey respondents are involved in making ebook purchasing recommendations and decisions.

Figure 6. Are you involved in the recommendation/purchasing process of ebooks for your library?
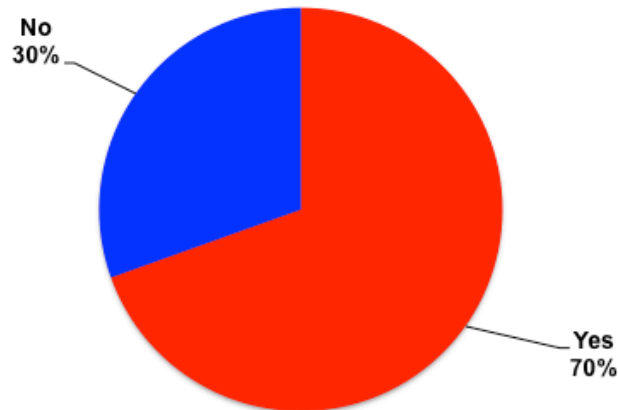*% of public libraries, 2014*

Table 6. Do you have a role in making purchasing recommendations/decisions for ebooks in your school?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Yes	68%	64%	74%	83%	66%	75%	63%	73%
No	32%	36%	26%	17%	34%	25%	37%	27%

Onward

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

2. EBOOK SUPPLY AND DEMAND

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

Offer Ebooks

Year after year, survey after survey, the number of public libraries that offer ebooks to patrons keeps growing. This year, 95% of respondents indicated that they offer ebooks to library users. In 2010, fewer than three-fourths of libraries offered ebooks (see Figure 8 on the next page).

Figure 7. Does your library offer ebooks?
% of public libraries, 2014
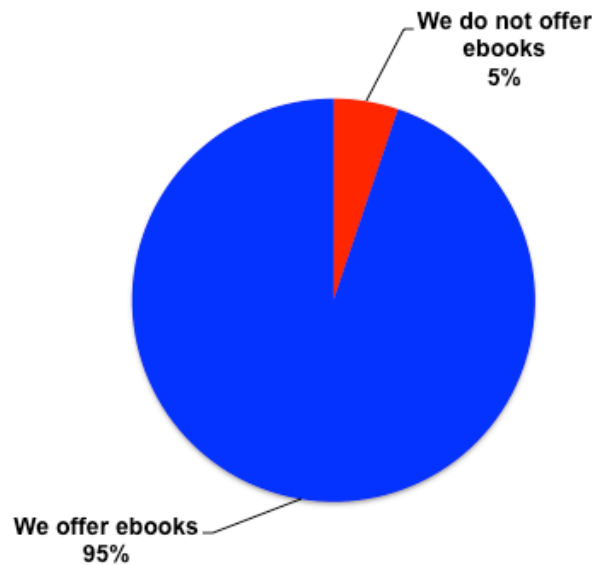
The following table breaks these data down by population served and geographic region. As we remark each year, those libraries that serve smaller populations tend to be lagging behind those that serve larger populations—although they are swiftly catching up. Larger libraries tend to have correspondingly larger budgets, a factor to consider when looking at many other questions in this survey.

Table 7. Does your library offer ebooks?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We do not offer ebooks	14%	1%	1%	0%	4%	5%	3%	7%
We offer ebooks	86%	99%	99%	100%	96%	95%	97%	93%

Last year, we began adding time series charts to track responses over the four years' worth of surveys, which we reprise this year. Figure 8 shows the extent to which public libraries have increasingly been making ebooks available to their users.

Since 2010, libraries that serve the smallest populations have lagged behind larger libraries. Lack of funds is the predominant reason for not offering ebooks, but—as we will see in the next question—one-fifth of under-25,000 libraries still report they see "no demand for ebooks."
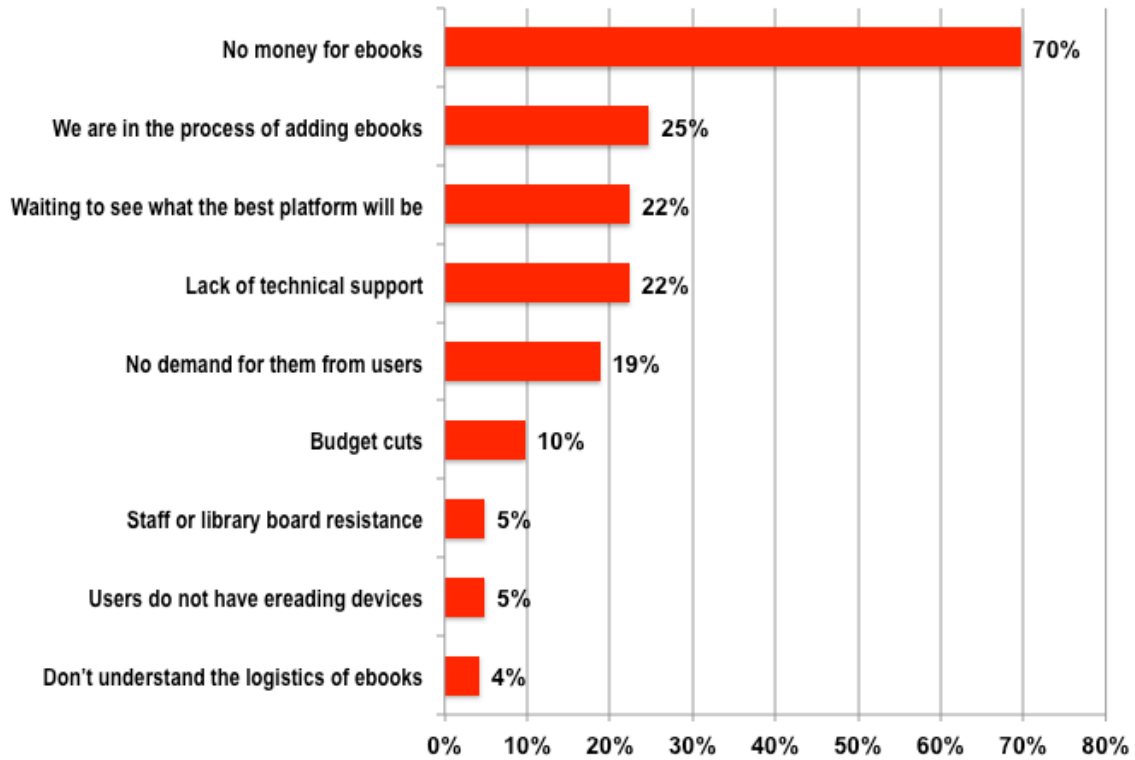
Figure 8. Public libraries that offer ebooks
% of public libraries by population served, 2010–2014
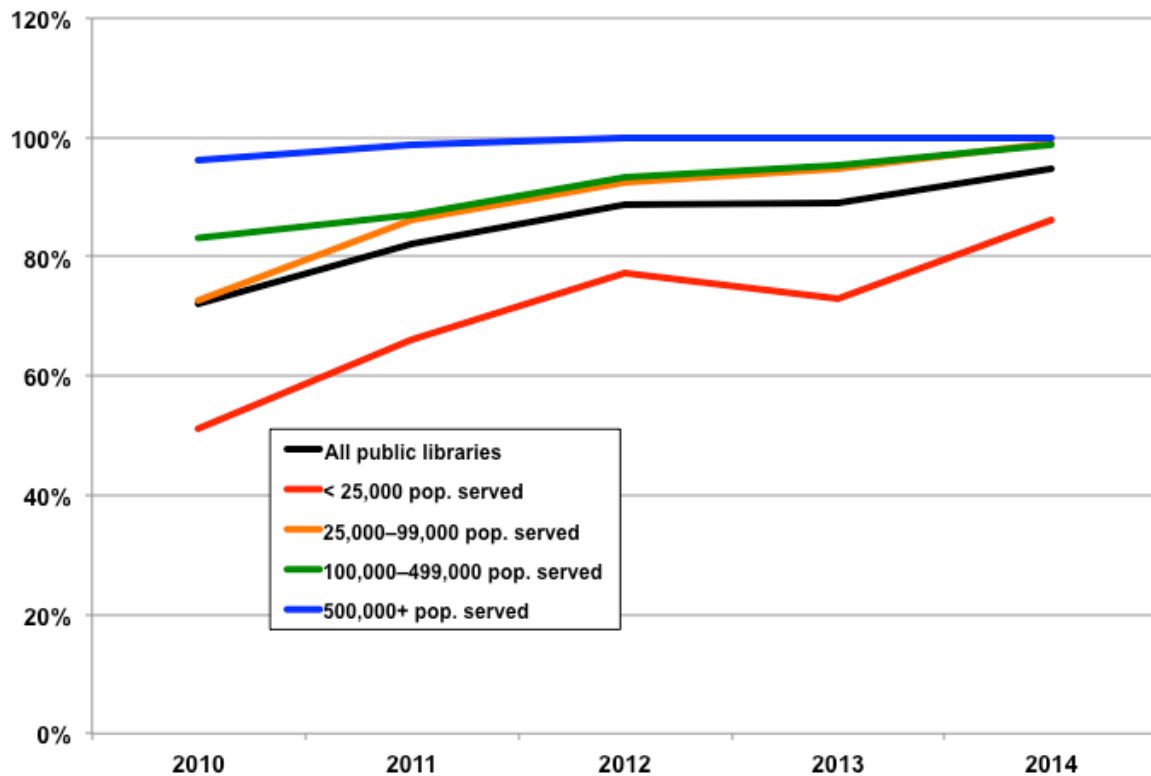
Libraries Without Ebooks

Of those libraries that do not offer any ebooks (5% of all respondents), the top reason is "no money for ebooks." One-fourth of that 5% of libraries say "we are in the process of adding ebooks." A few libraries are still awaiting the "best" platform to shake out, and a few lack technical support to add ebooks.

Figure 9. Why doesn't your library offer ebooks?
% of public libraries, 2014

Table 8. Why doesn't your library offer ebooks?
% of public libraries that do not offer ebooks, by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No money for ebooks	74%	100%	0%	0%	60%	78%	100%	66%
Waiting to see what the best platform will be	26%	0%	0%	0%	0%	52%	46%	18%
Lack of technical support	21%	100%	0%	0%	0%	26%	100%	18%
No demand for them from users	21%	0%	0%	0%	20%	0%	54%	19%
Budget cuts	11%	0%	0%	0%	0%	0%	0%	20%
Users do not have ereading devices	5%	0%	0%	0%	0%	0%	54%	0%
Staff or library board resistance	5%	0%	0%	0%	0%	26%	0%	0%
Don't understand the logistics of ebooks	5%	0%	0%	0%	0%	0%	0%	9%
We are in the process of adding ebooks	21%	0%	100%	0%	20%	22%	46%	24%

Looking back at the past four years, the data are not especially robust given how small the response base to this question has generally been (less than 20% of all respondents on average and only 5% in 2014). Be that as it may, "no money for ebooks" remains the top reason for not adding ebooks—and continues to climb. A few libraries are awaiting the "best" platform to emerge, and most seem to have resolved themselves to dealing with the market as it currently stands. "No demand for them from users" ticked up to 19% of libraries that do not offer ebooks. "Users do not have ereading devices" is becoming non-existent, as more and more people have some kind of mobile electronic device, be it a tablet or a smartphone (or something in between).

**Figure 10. Why doesn't your library offer ebooks?**
% of public libraries, 2011–2014
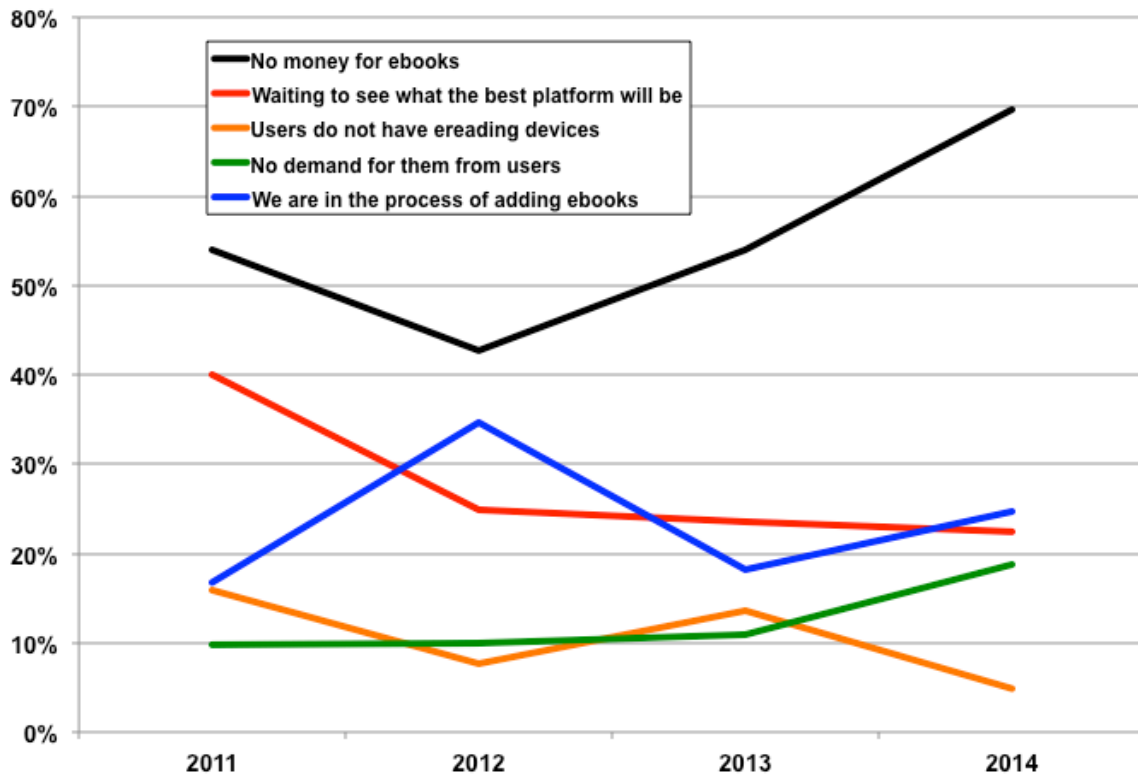
Ebook Plans

Of the 5% of public libraries that do not offer ebooks, 19% have ruled out ever buying ebooks—lest that sound large, bear in mind that that only accounts for less than 1% of all public libraries. On the other hand, 29% say they definitely will be adding ebooks to their collections, while 42% may add them, but haven't yet made it a priority.

Figure 11. What are your library's plans for ebook purchases in the next two years?
% of public libraries that do not currently offer ebooks, 2014
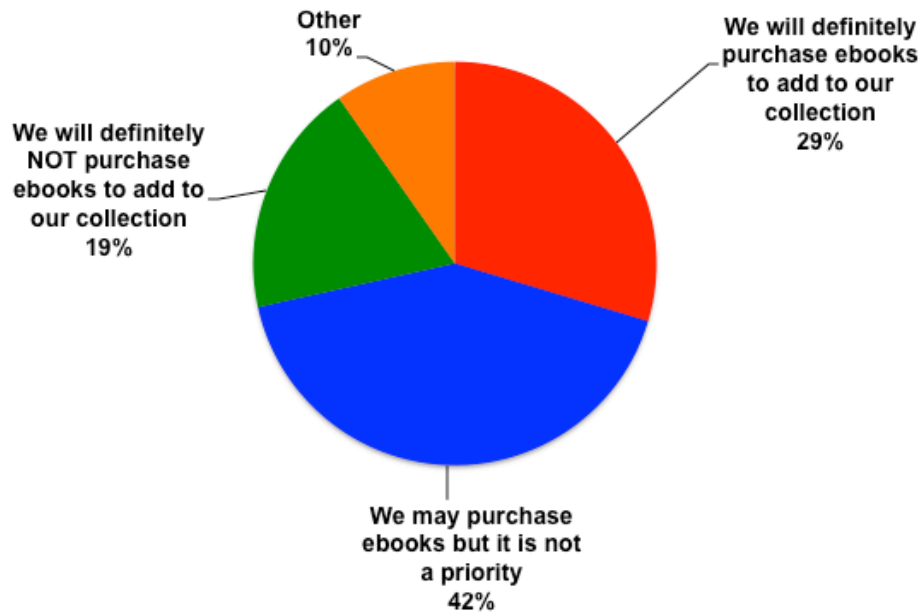
It is the smaller libraries that say they will not be acquiring any ebooks in the next two years.

Table 9. What are your library's plans for ebook purchases in the next two years?
% of public libraries that do not currently offer ebooks, by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We will definitely purchase ebooks to add to our collection	26%	0%	100%	0%	20%	22%	46%	34%
We may purchase ebooks but it is not a priority	47%	0%	0%	0%	60%	52%	54%	27%
We will definitely NOT purchase ebooks to add to our collection	16%	100%	0%	0%	0%	26%	0%	29%
Other	11%	0%	0%	0%	20%	0%	0%	10%

The decline in the number of libraries "definitely" planning to add ebooks in the near future is due in large part to the fact that they have already added them, as is the case in the 25,000–99,000 population served category. The last holdouts in the 100,000–499,000 category will be adding ebooks in the next two years.

Figure 12. Will _definitely_ purchase ebooks to add to our collection
% of public libraries that do not currently offer ebooks, by population served, 2011–2013
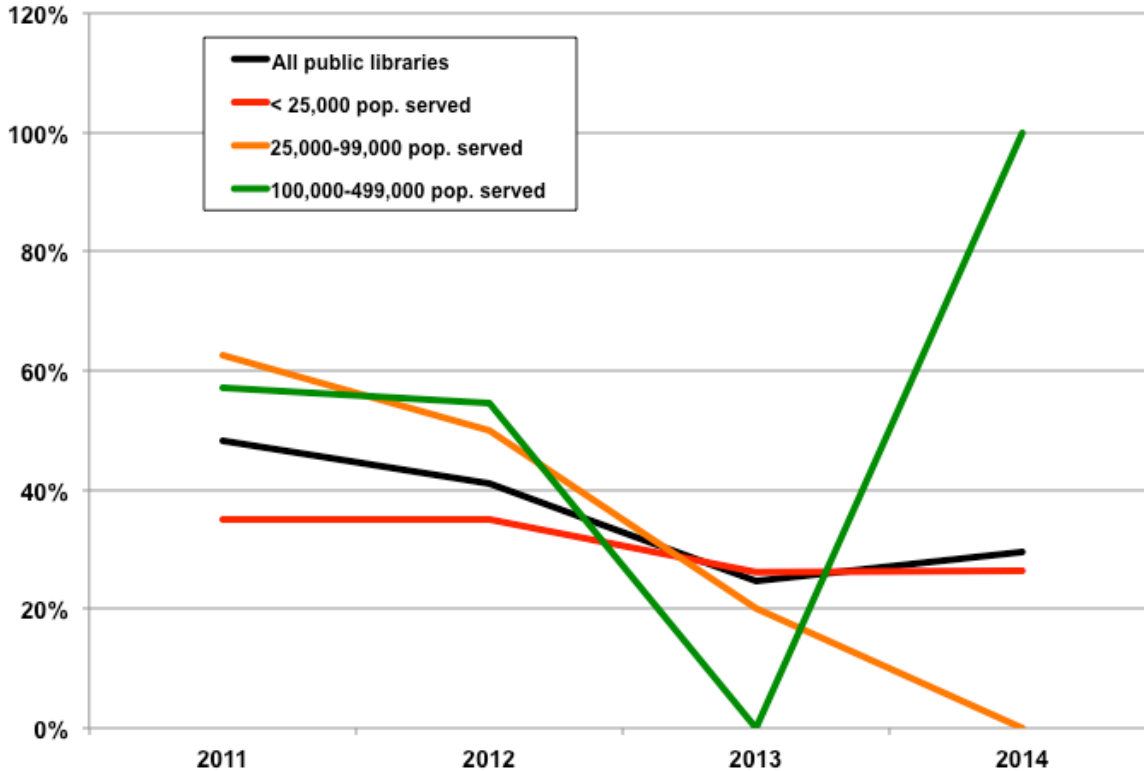
Note: 500,000+ population-served libraries omitted as they were at 0% all four years.

How Long Libraries Have Offered Ebooks

As of 2014, public libraries have been offering ebooks to users, on average, for 3.8 years, up—logically—from 2.8 years as reported in last year's survey. Forty-two percent of 2014 respondents said that they have carried ebooks for three to four years, and 37% for five years or more. Only 4% have offered ebooks for less than one year.

Figure 13. How long has your library offered access to ebooks?
% of public libraries, 2013–2014
<u>**Mean (2013): 2.8 years**</u>
<u>**Mean (2014): 3.8 years**</u>
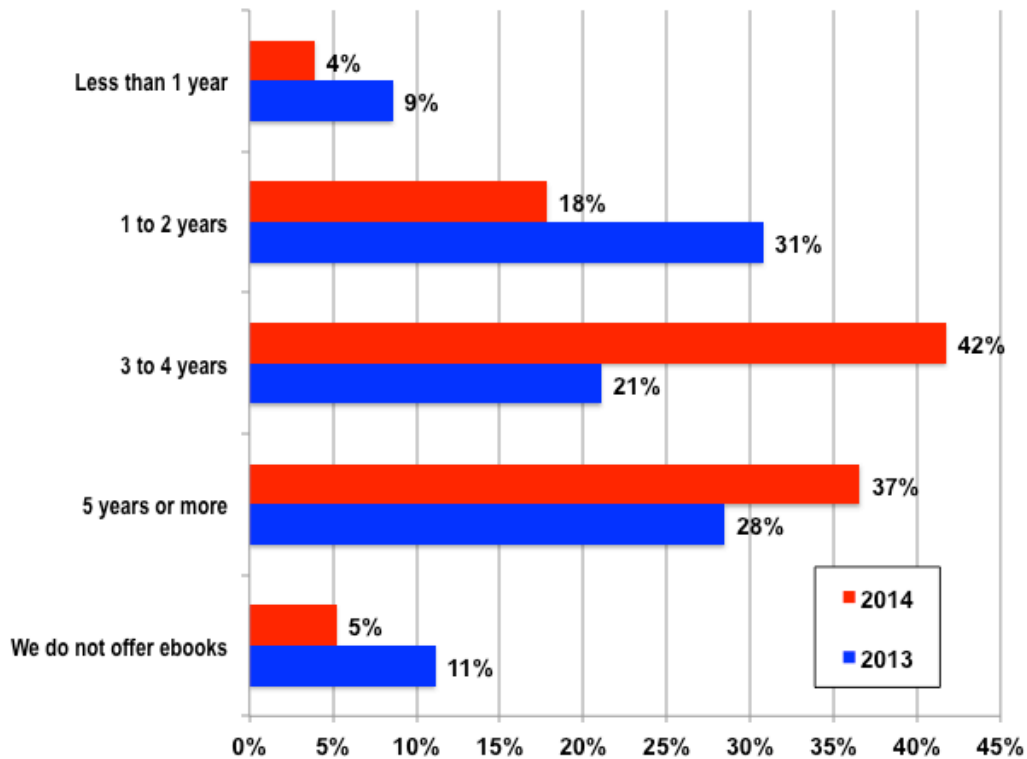
The very largest libraries have offered ebooks for almost five years on average, compared to just over three years for smaller libraries.

Table 10. How long has your library offered access to ebooks?
% of public libraries by population served and geographic region, 2013–2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
We do not offer ebooks	27%	5%	5%	0%	10%	7%	13%	14%
Less than 1 year	6%	2%	4%	0%	1%	0%	3%	9%
1 to 2 years	29%	16%	11%	10%	17%	10%	23%	21%
3 to 4 years	36%	49%	45%	16%	43%	45%	38%	40%
5 years or more	29%	33%	41%	74%	39%	44%	36%	29%
Mean # years	3.3	3.8	4.0	4.8	3.9	4.2	3.7	3.4
2013								
Less than 1 year	12%	6%	11%	0%	2%	8%	11%	14%
1 to 2 years	31%	35%	29%	14%	27%	40%	24%	33%
3 to 4 years	21%	25%	15%	17%	24%	28%	18%	16%
Over 4 years	10%	28%	41%	69%	38%	17%	34%	22%
Mean # years	2.3	2.9	3.0	3.9	3.2	2.6	3.0	2.5

How Many Ebooks?

The mean number of ebooks to which public libraries have access is 20,244. The mean, however, tends to be skewed by the largest libraries, so the median gives us a more representative number. In this survey, the median number of ebooks to which public libraries have access is 10,484, up from 7,380 in our 2013 survey.

Figure 14. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?
% of public libraries, 2014
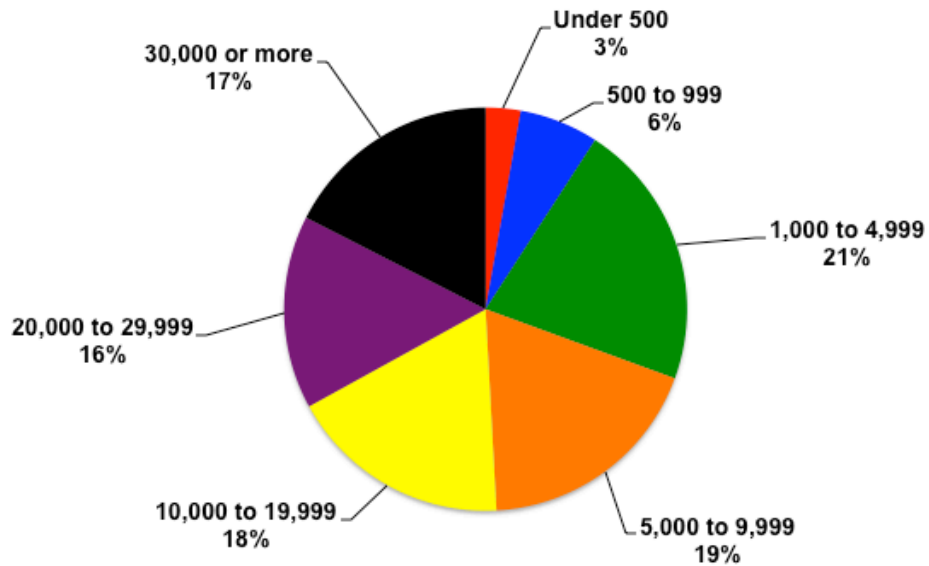**Mean: 20,244**
Median: 10,484

Table 11. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Under 500	6%	2%	1%	0%	2%	3%	2%	4%
500 to 999	7%	7%	5%	3%	2%	2%	9%	11%
1,000 to 4,999	22%	23%	23%	7%	14%	35%	21%	20%
5,000 to 9,999	20%	16%	21%	3%	15%	21%	9%	25%
10,000 to 19,999	20%	20%	18%	3%	28%	13%	22%	9%
20,000 to 29,999	16%	14%	17%	17%	14%	17%	14%	17%
30,000 or more	9%	17%	15%	67%	25%	8%	24%	14%
Mean # ebooks	14,724	19,446	18,967	56,872	28,588	12,139	22,213	16,288
Median # ebooks	8,912	10,800	10,000	31,250	15,988	7,226	14,300	7,909

Figure 15 looks at the growth of public libraries' ebook collections—in median number of titles available—since 2010. As expected, the largest libraries have been amassing quite large collections (growing from 2,660 in 2010 to 31,250 four years later). Smaller libraries have been more modestly increasing their collections, and all size libraries have surpassed—or are closing in on—10,000 ebooks.

Figure 15. Median number of ebooks library has access to
public libraries by population served, 2010–2014
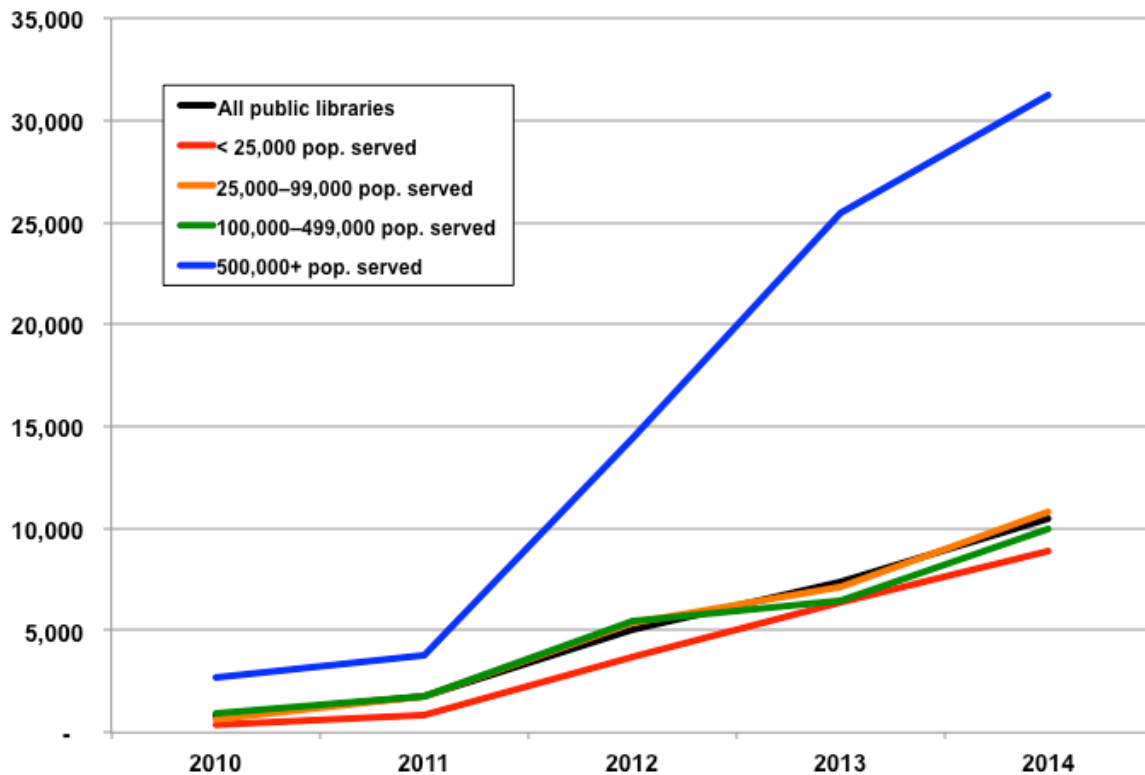
Demand for Ebooks

Supply of ebooks has been growing among libraries across the board, which implies that demand has been growing, as well. In 2014, 33% of respondents said that they had seen a "dramatic increase" in demand for ebooks, down from 42% last year (and down from 79% in 2012). More than one-half (58%) of respondents reported a "slight" increase in demand, up from 48% last year (and up from 18% in 2012). "Demand is unchanged" is down a tick from 9% to 8% and for the third year in a row, virtually none of our respondents said that they received no requests for ebooks (0.27% selected this option this year). The year 2012 was the year for explosive demand for ebooks, and since then demand has been tapering off but still remains high. Also, as 95% of libraries have added ebooks, the demand has already been met, so libraries are seeing fewer specific demands for the ebook format.

Figure 16. Have you experienced a change in demand for ebooks since this time last year?
% of public libraries, 2014
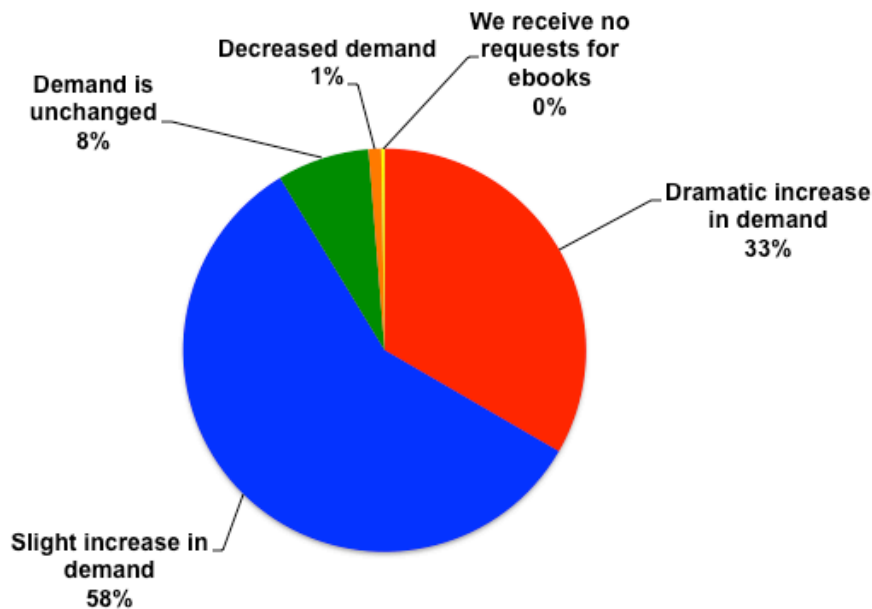
Table 12. Have you experienced a change in demand for ebooks since this time last year?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET Increase	90%	93%	90%	97%	94%	88%	91%	90%
Dramatic increase in demand	29%	25%	41%	68%	30%	26%	39%	38%
Slight increase in demand	61%	68%	49%	29%	64%	62%	51%	52%
Demand is unchanged	8%	7%	8%	0%	3%	10%	9%	10%
Decreased demand	2%	0%	1%	3%	2%	2%	0%	0%
We receive no requests for ebooks	1%	0%	0%	0%	1%	0%	0%	0%

Historically, the increase in demand for ebooks had been tapering off as public libraries increased the size of their collections, but demand among all but the largest libraries has inched up in the past year. Most of this heightened demand is "slight" rather than "dramatic."

Figure 17. Public libraries experiencing a <u>dramatic or slight increase</u> in demand for ebooks
% of public libraries by population served, 2011–2014
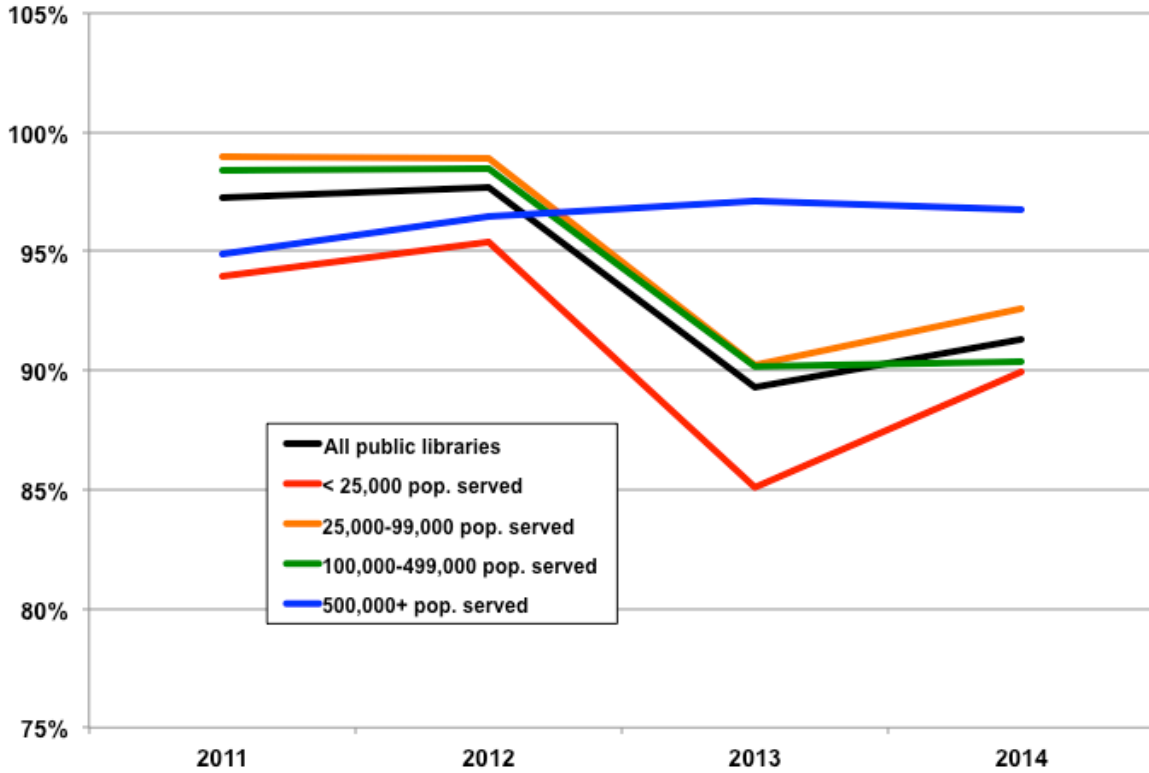
Ebook Circulation

In our current survey, respondents reported a mean circulation/usage of 67,481 ebooks (median: 13,418) in fiscal year 2013 (or their most recent fiscal year). This is up 15% from a mean of 58,428 (median: 12,139) in last year's survey. So, corroborating the previous question, demand indeed appears to be up this year.

Overall, more than one-half (57%) reported that they circulated 10,000 or more ebooks in 2013.

Figure 18. Approximately what was your total ebook usage/circulation in 2013 (or your last complete fiscal year)?
% of public libraries, 2014
Mean ebook circulation: 67,481
Median ebook circulation: 13,418
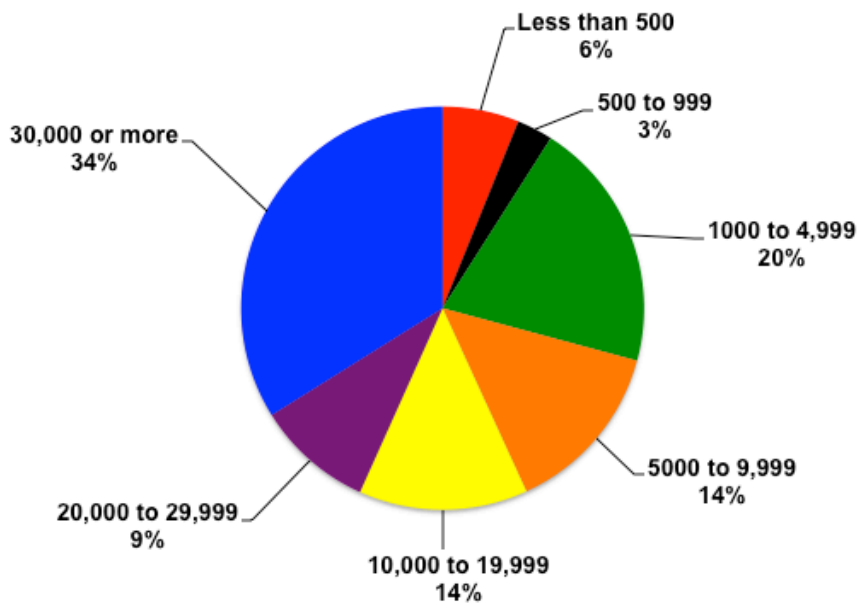
Table 13. Approximately what was your total ebook usage/circulation for 2013 (or your last complete fiscal year)?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Less than 500	14%	4%	0%	0%	5%	12%	0%	7%
500 to 999	5%	4%	0%	0%	3%	3%	5%	2%
1000 to 4,999	42%	16%	7%	0%	23%	21%	20%	17%
5000 to 9,999	23%	15%	6%	4%	11%	25%	8%	13%
10,000 to 19,999	7%	22%	15%	0%	10%	16%	8%	19%
20,000 to 29,999	4%	14%	9%	4%	9%	4%	8%	13%
30,000 or more	4%	24%	63%	92%	39%	19%	51%	29%
Mean ebook circulation	18,169	24,283	86,209	430,178	59,905	21,819	167,839	59,576
Median ebook circulation	2,395	13,274	59,355	306,670	15,198	6,500	30,000	15,883

Figure 19 tracks median ebook circulation for the past four years. Circulation continues to soar for the largest libraries, rises modestly for 100,000–499,000-population served libraries, and rises only very slightly for small and mid-size libraries.

Figure 19. Median ebook usage/circulation for the previous fiscal year
Public libraries by population served, 2011–2014
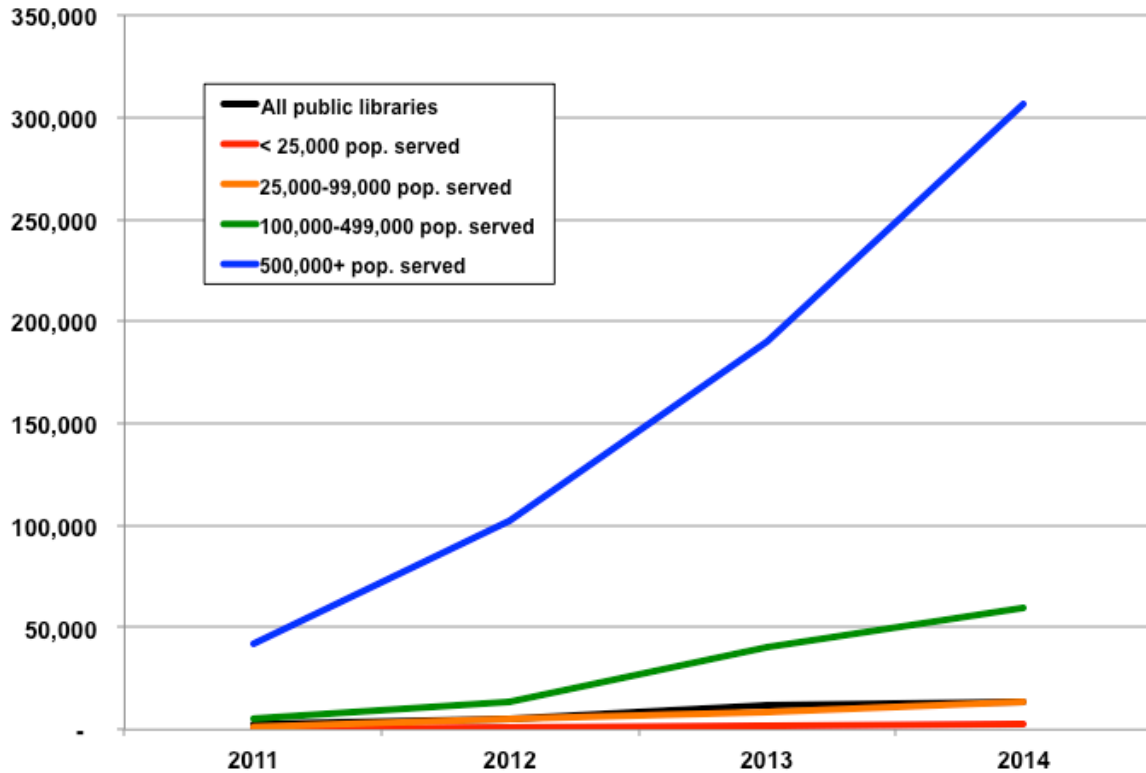
Changes in Circulation/Usage

As is typically the case, the vast majority (88%) of libraries expect ebook circulation to increase this year compared to last year, while 12% expect it to remain the same. No one anticipates a decrease.

Overall, respondents expect a net 25% increase in ebook circulation for this year. This is down from last year's expectation of a 39% increase.

Figure 20. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
% of public libraries, 2014
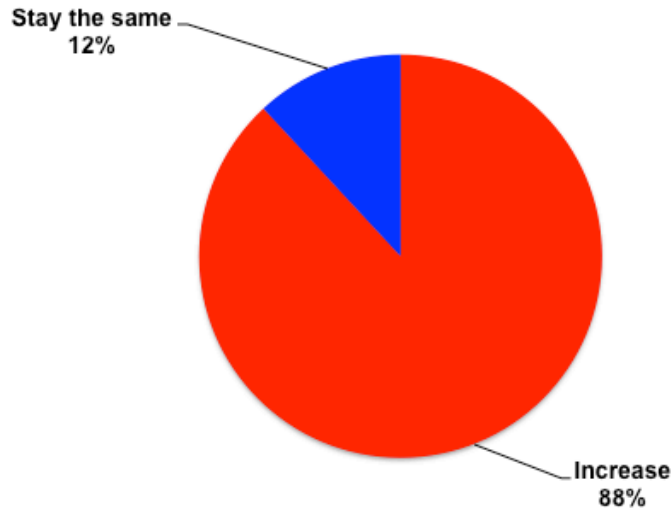
Table 14. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Increase	86%	86%	92%	97%	89%	91%	88%	86%
By what percent?								
Less than 10%	22%	13%	20%	8%	20%	17%	7%	19%
10% to 24%	41%	51%	37%	32%	41%	53%	44%	37%
25% to 49%	17%	21%	24%	56%	26%	15%	40%	19%
50% to 74%	11%	6%	10%	0%	5%	9%	5%	12%
75% to 99%	5%	2%	0%	0%	3%	1%	0%	4%
100% or more	4%	8%	9%	4%	5%	5%	4%	10%
Average % increase	29	28	29	28	26	26	28	33
Stay the same	14%	14%	8%	3%	11%	9%	12%	14%
Overall % change expected	25	24	27	28	23	24	24	28

For this question, we created two time series figures to gauge the extent to which ebook circulation is expected to change. In the first (Figure 21), we look at respondents who, in general, expect ebook circulation/usage to increase.

Figure 21. Public libraries that expect ebook circulation/usage to <u>increase</u> in the next year compared to the previous year
% of public libraries by population served, 2011–2014
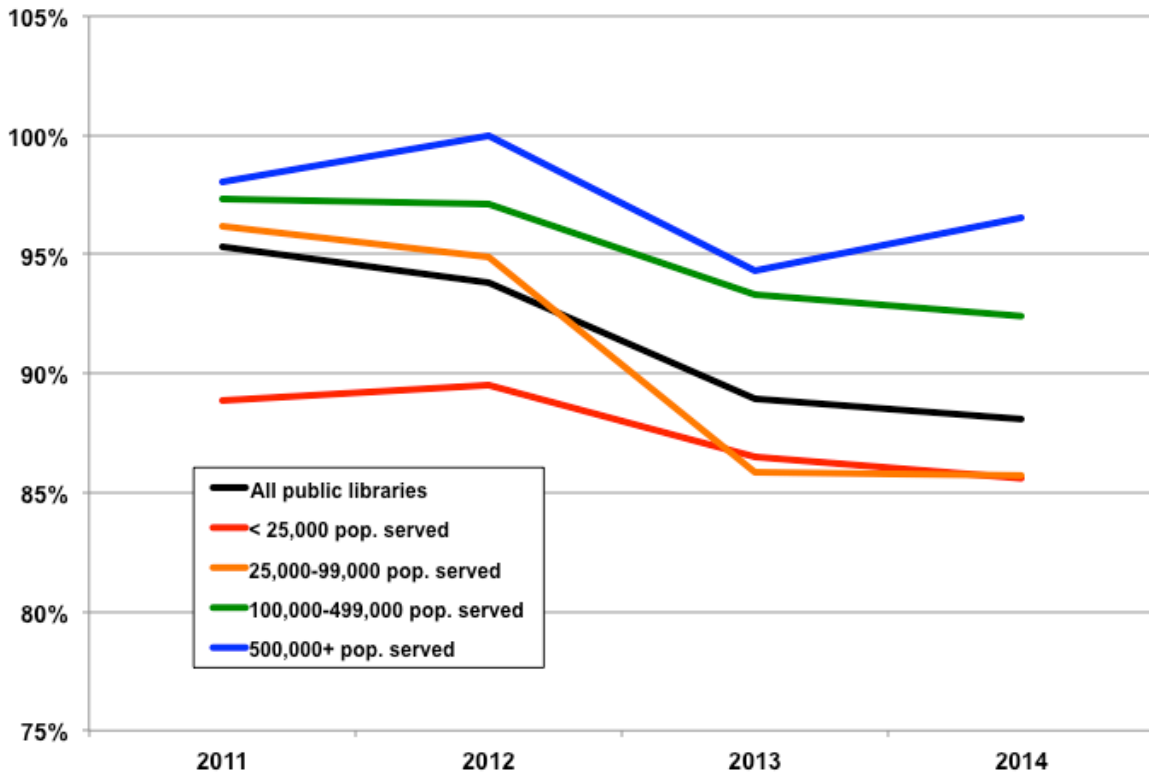
In the second time series (Figure 22), we look at the *magnitude* of that expected increase, or the overall percent change in ebook circulation/usage. Among all library sizes, projected ebook circulation is declining, and quite substantially from 2011. As a result, we get the sense that ebooks are pretty close to reaching peak penetration in public libraries.

Figure 22. Overall percentage change in ebook circulation/usage
% increase in ebook circulation, public libraries by population served, 2011–2014
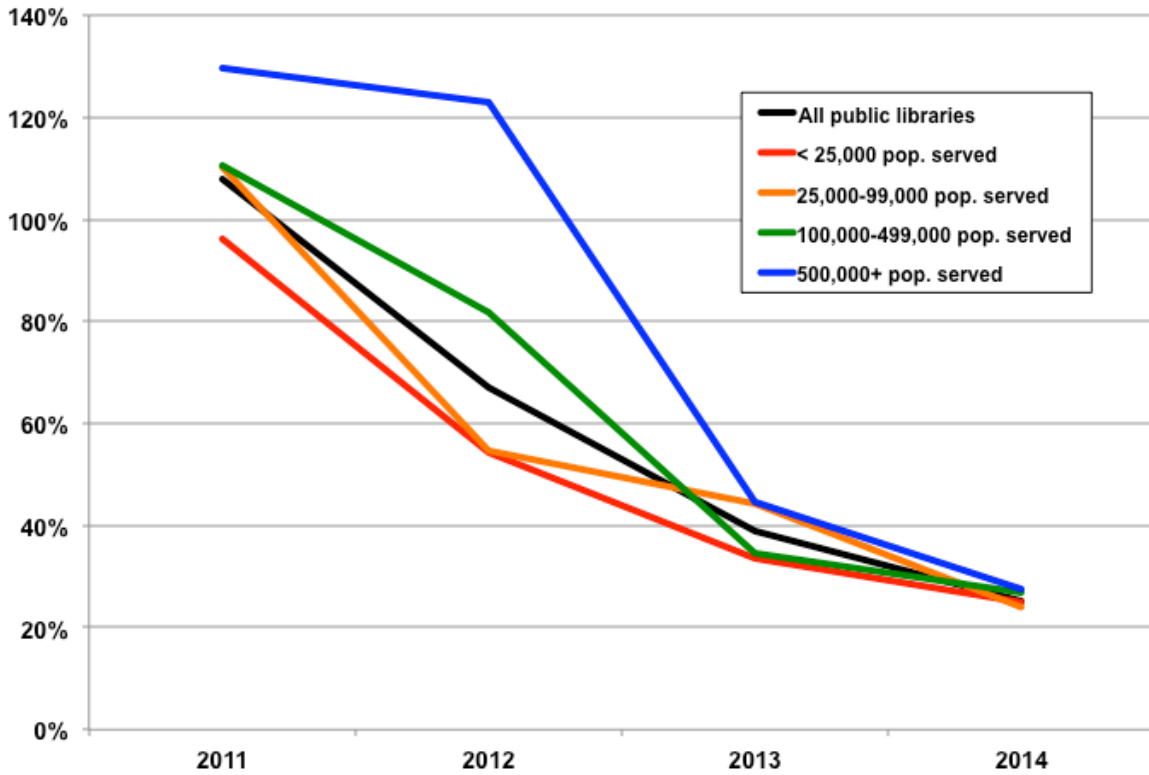
Holds-to-Copy Ratio

Virtually all public libraries allow users to place holds on ebooks, and a majority license or purchase additional copies to fulfill those holds. We asked in 2011, in 2013, and again in 2014, if libraries have a set holds-to-copy ratio for ebooks. In 2014, 47.5% of libraries said that they did, statistically unchanged from last year (47.1%), and down five percentage points from 2011. The average holds-to-copy ratio for ebooks is 6:1, unchanged from previous surveys.

Figure 23. Do you have a set holds-to-copy ratio for ebooks?
% of public libraries, 2011, 2013, 2014
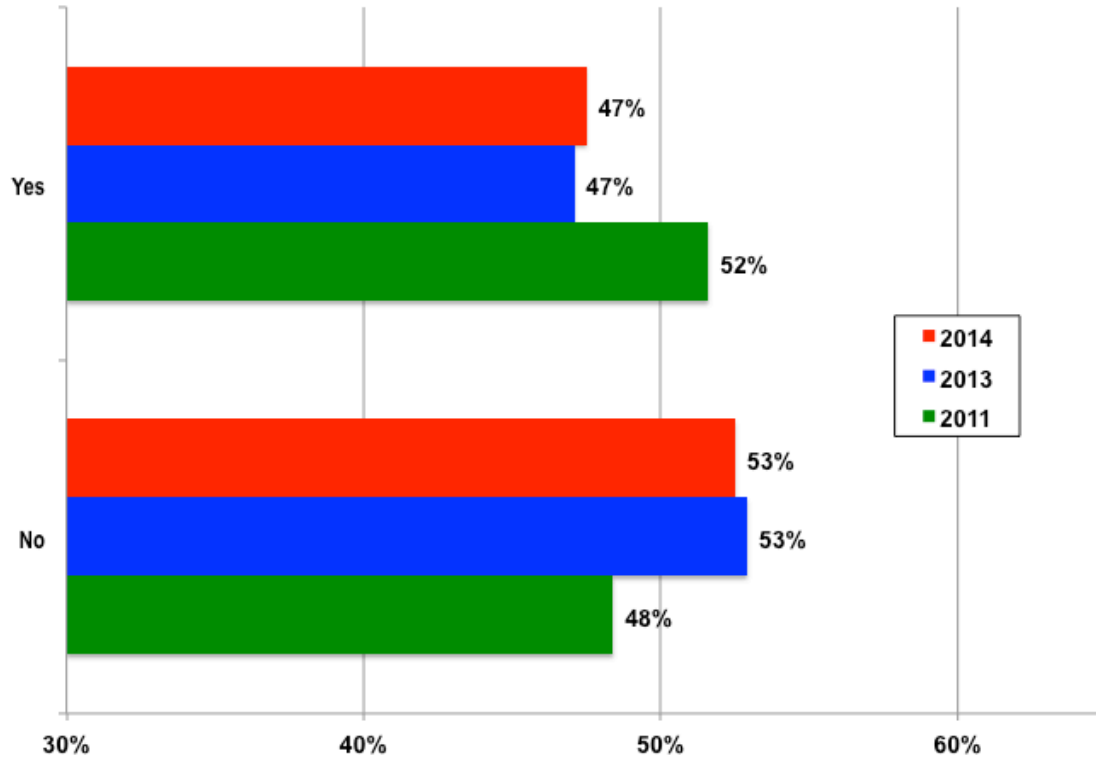
Larger libraries are more likely than smaller ones to have a set holds-to-copy ratio for ebooks, although the actual ratio has remained fairly constant across all size libraries.

Table 15. Do you have a set holds-to-copy ratio for ebooks?
% of public libraries, by population served and geographical region, 2011, 2013, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Yes	35%	50%	51%	83%	57%	47%	54%	36%
If yes, the average holds-to-copy ratio is:	6:1	5:1	6:1	6:1	5:1	7:1	7:1	5:1
No	65%	50%	49%	17%	43%	53%	46%	64%
2013								
Yes	29%	49%	57%	74%	48%	34%	58%	46%
If yes, the average holds-to-copy ratio is	7:1	6:1	7:1	5:1	6:1	8:1	5:1	6:1
No	71%	51%	43%	26%	52%	66%	42%	54%
2011								
Yes	42%	47%	54%	69%	50%	55%	53%	44%
If yes, the average holds-to-copy ratio is:	7:1	6:1	6:1	6:1	6:1	6:1	6:1	5:1
No	58%	53%	46%	31%	50%	45%	47%	56%

Usage Statistics

One way that libraries gauge the demand for ebooks—and adjust the supply to meet that demand—is through usage statistics. The good news is that it appears to be getting easier to track such user statistics; in 2014, 81% of respondents said they could easily track ebook usage, up three percentage points from last year.

Figure 24. How easily can you track usage statistics for ebooks?
% of public libraries, 2013/2014
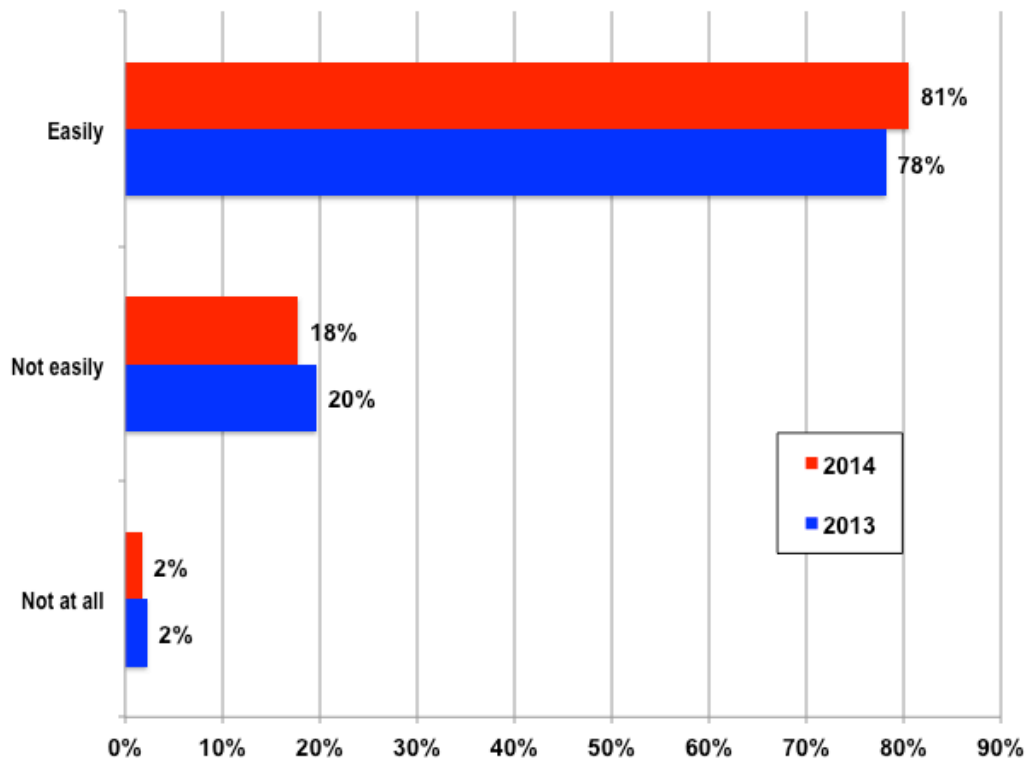
Table 16. How easily can you track usage statistics for ebooks?
% of public libraries by population served and geographic region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Easily	84%	75%	84%	77%	84%	82%	86%	74%
Not easily	15%	21%	16%	19%	14%	14%	14%	25%
Not at all	1%	3%	0%	3%	2%	4%	0%	1%
2013								
Easily	80%	72%	83%	86%	80%	69%	78%	83%
Not easily	17%	26%	16%	14%	19%	26%	20%	15%
Not at all	3%	2%	2%	0%	1%	5%	2%	2%

In Summary

Nearly all public libraries (95%) now offer ebooks, and only the smallest still do not. Essentially, only 1% of all public libraries have categorically ruled out ever adding ebooks.

Of that 5% that do not yet offer ebooks, money is by far the biggest barrier, with other traditional barriers—such as waiting for the "right" platform to emerge—becoming less and less of an impediment. "Users do not have ereaders" is almost at 0%.

As the number of libraries offering ebooks has grown, so, too, have ebook collections. Last year, public libraries had median ebook collections of 7,380 titles, and this year that has climbed to 10,484 titles. Circulation has also been on the rise, with libraries reporting a median ebook circulation of 13,418 this year, compared to 12,139 last year.

That all said, 2012 was the year for peak ebook demand, and while demand remains at a very high level (0% reported that demand was decreasing) it is not climbing as dramatically as it had been. Two surveys ago, we called ebooks "the new normal," and that phrase applies now more than ever.

In Their Own Words

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

- *"Access to digital materials and to ereader devices are two of many services we provide. Many patrons prefer print and still others prefer audio. We don't feel threatened by the growing demand for digital materials; rather it adds another dimension to the work we do."*

- *"The big challenges are easily getting circulation statistics for individual titles/authors; getting access to titles our patrons want but are unavailable through Overdrive (Example:* Killing Jesus *ebook is still not available on Overdrive; mass market romances that cost over $50.)"*

- *"The cost from publishers is often prohibitive. It is important for publishers and libraries to work together to provide affordable and seamless access to ebooks."*

- *"Currently, approximately 3 out of 5 new customers join the library specifically to have access to ebooks."*

- *Demand increases with the passing of each gift-giving holiday. We will renovate our building next year, moving into much smaller space during construction. We will greatly reduce the number of print books we purchase (along with other physical items) during that time because we won't have a place to put them. This will be an opportunity to really develop the ebook collection, possibly adding another vendor, as long as we get to retain the rights to the items we purchase (rather than give up access if we change vendors at some point in the future)."*

- *"Ebook circulation is still growing here and from the looks of the first quarter, we will continue to exceed our last year's circulation by a good amount."*

- *"Ebook use is on the rise in our library system, but print is still 'king.' I think this might change in the coming years. The teens I interact with seem to prefer print. We have people come in weekly with devices and want help downloading books. It is sometimes challenging with all the different formats and devices. Our library system is trying to keep up with the demand and train frontline staff members."*

- *"Ebooks are a wonderful addition to the library. I wish the publishers would figure out what they are doing."*

- *Ebooks are great in many ways, but there are definitely barriers of technology, digital literacy skills, money, and more that must be overcome. They are rapidly changing many different aspects of library operations, including reference work, selection, and circulation."*

- *"E-books are popular with a select group of people, who should be served. There are many more though who are not interested or do not have a device/computer—at least at this time."*

- *"Ebooks is a trend that publishers may be pushing however, in small rural areas the cost of purchasing them places a heavy financial burden on libraries. It would be good to offer a rate that would allow those libraries to be more competitive with larger ones."*

- *"For us, it is another format—we offer print, large print, audio, DVD and ebooks."*

- *"Given our rural location, local poverty, and lack of Internet access it will take at least 2 to 4 years for our population to catch up to enjoying more ebook access. Smartphones are the most popular devices used here with dedicated ebook devices being the next most popular."*

- *"I expect that the adoption of ebooks by our users may begin expanding more rapidly once our school district fully adopts the 'bring your own device' policy and begins making textbooks available in downloadable format. At the moment, they have not quite moved into downloadable textbooks, but that move should happen soon."*

- *"I think they are the latest format to be added to library collections. They will not replace print. Our enthusiastic ebook readers are also enthusiastic print readers."*

- *"I wish we could do more to market them. I'm always surprised people don't realize we have them (and have for a long while)."*

- *"I would love to be able to purchase more ebooks for our library but am hampered but budget constraints. Our ebook circulation has seen a steady increase since we first began offering them, and I expect it to continue to grow as patrons realize that they can access them through our library."*

- *"I would spend more on ebooks if they were being checked out by a larger percentage of my patrons. I would spend more on ebooks if more publishers were offered."*

- *"If libraries are to provide ebooks in any more useful manner, popular ebooks must be affordable, ebooks must be easier to discover and download, and (in my town) more people have to have devices on which to read them."*

- *"Many of our patrons continue to be unaware that we offer ebooks or e-audiobooks. Also the limited borrowing model of the 3M Cloud frustrates many. Finally, the convoluted initial download requirements guarantee that only the tech savvy will access them."*

- *"Most of our patron base is not very computer literate, so ebook use is relatively low here. We expect that to change as more people get used to using smartphones and relatively inexpensive tablets, and as tablet/laptop use in the schools increases."*

- *"Once folks start using them, they are hooked....a lot of retired folks also use them. They're great for travel, resizing of print, ease of return."*

- *"Our patrons LOVE ebooks. We hold monthly workshops on how to use the system and download books from home. We have one of the consistently highest e-book circs of our consortium. I only wish we could get more staff fluent with the process."*

- *"The demand remains high for new titles and bestsellers. Yet, we seem to have increasing interest in backlist titles—both in genre and unexpected subjects. The PDA has informed that purchasing."*

- *"The lack of stability in the marketplace is confusing to ebook purchasers and our patrons who desire them. Overdrive is a flawed system with many frustrating problems."*

- *"The price we spend per book is outrageous. Many people don't understand why we do not have access to more, or why the newest book by a certain popular author is not available. We explain it to them, but they sill get frustrated that we don't have what they are looking for now."*

- *"They are exorbitantly expensive compared to print. Patrons don't understand why we can't purchase all 20 top bestsellers like we do for print. It's very disheartening. The initial setup of the Overdrive app is also confusing for people."*

- *"We are a small public library in a rural area. Little interest at this time expressed by patrons for ebooks. Several have tablets and download off the consortium sites."*

- *"We are a small rural library and have very little money to spend on e-books. Fortunately, we are part of a consortium and we are allowed to use their material."*

- *"We are a smaller library and the effects of ebook availability has been multiplying*

slowly but steadily. We foresee there to be a continued increase in ebook circulation.”

- *“We have just begun. We have a steady increase of new users each month (approx. 150). We will be working to make expenditures match the usage as the pendulum swings to electronic formats.”*

- *“We look at ebooks as another medium. We try to provide content to our patrons in the medium which each individual desires.”*

- *“With the recent addition of Freading, and ebooks and downloadable media added to the catalog in the last year, the demand has gone up. Staff has been trained on a number of devices, and are now being taught to think ‘outside the box’ when a paper or audio version isn’t readily available—but a tablet is.”*

3. EBOOK COLLECTIONS AND CATEGORIES

This section looks at the composition of public libraries' ebooks collections, and the top circulating ebook genres/subjects. We also discuss the factors that hinder the public from accessing ebook collections, as well as their voiced complaints about ebooks to the library..

Fiction vs. Nonfiction

In last year's survey, we added a question to gauge the relative sizes of libraries' fiction vs. nonfiction ebook collections. This year, we asked how that ratio compared to that of libraries' *print* book collections.

On average, 74% of public libraries' ebook collections were fiction titles, while 26% were nonfiction. These are exactly the same percentages as last year. The fiction/nonfiction split among print books was more even; 57% fiction vs. 43% nonfiction.

Figure 25: Approximately what percent of the *ebooks* you have available are fiction titles vs. nonfiction titles?
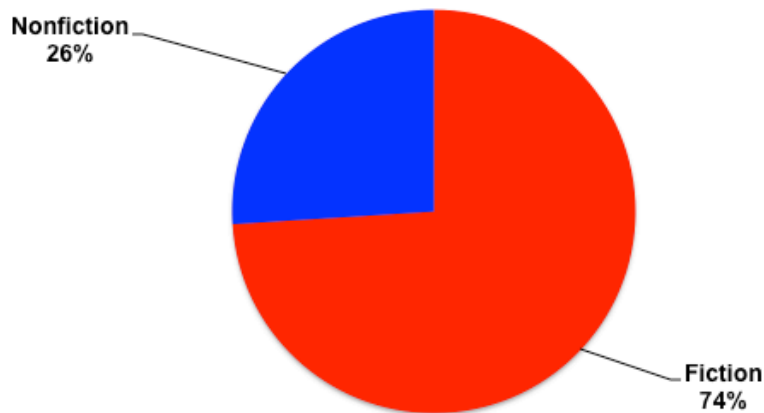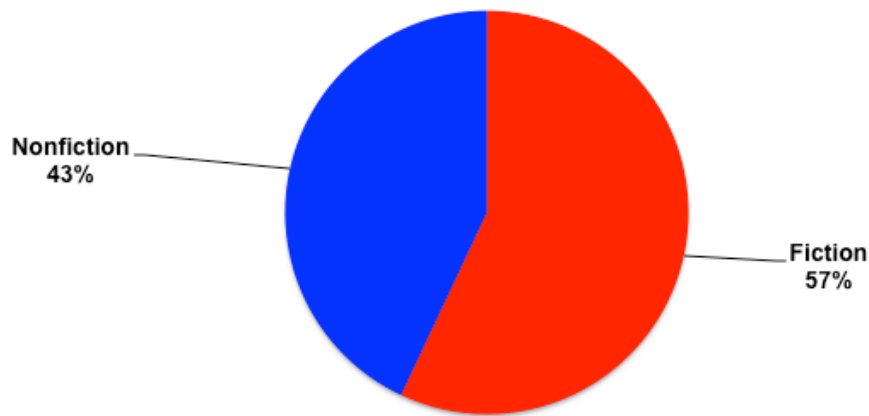*% fiction vs. % nonfiction, all public libraries, 2014*

Figure 26. Approximately what percent of the *print books* you have available are fiction titles vs. nonfiction titles?
% fiction vs. % nonfiction, all public libraries, 2014

In terms of ebooks, the ratio of fiction to nonfiction doesn't change appreciably by size of library—or even geography—but larger libraries tend to have a higher percentage of nonfiction print books than do smaller libraries. This likely represents a larger amount of legacy reference materials owned by larger libraries.

Table 17. Approximately what percent of the *ebooks* and *print books* you have available are fiction titles vs. nonfiction titles?
% fiction vs. % nonfiction, public libraries by population served and geographic region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Ebooks								
2014								
Fiction	75%	75%	74%	73%	75%	74%	73%	75%
Nonfiction	25%	25%	26%	27%	25%	26%	27%	25%
2013								
Fiction	73%	74%	75%	70%	75%	73%	74%	74%
Nonfiction	27%	26%	25%	30%	25%	27%	26%	26%
Print Books								
2014								
Fiction	63%	56%	55%	52%	56%	57%	53%	61%
Nonfiction	37%	44%	45%	48%	44%	43%	47%	39%

Ebook Categories

Virtually all public libraries offer "general adult fiction" (99%) and "general adult nonfiction" (96%). Almost all now offer "young adult fiction" and "children's fiction" (96% and 93%, respectively).

Figure 27. Which categories of ebooks does your library currently offer users?
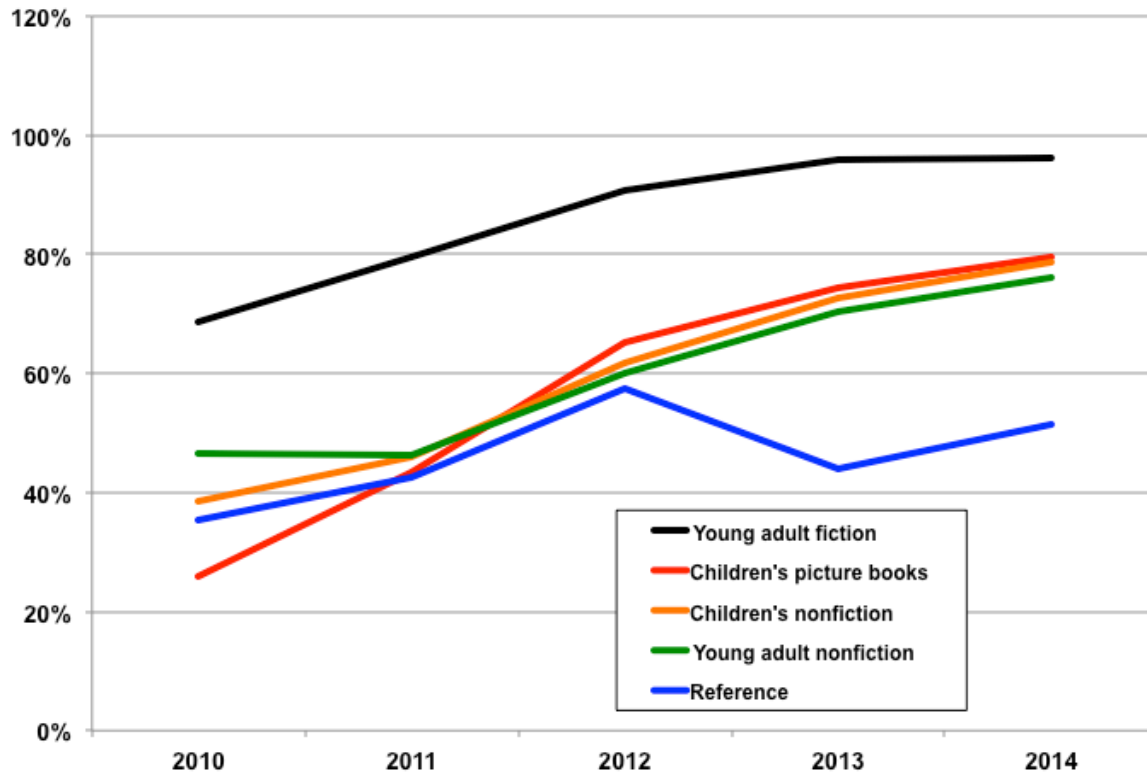*% of public libraries, 2014*
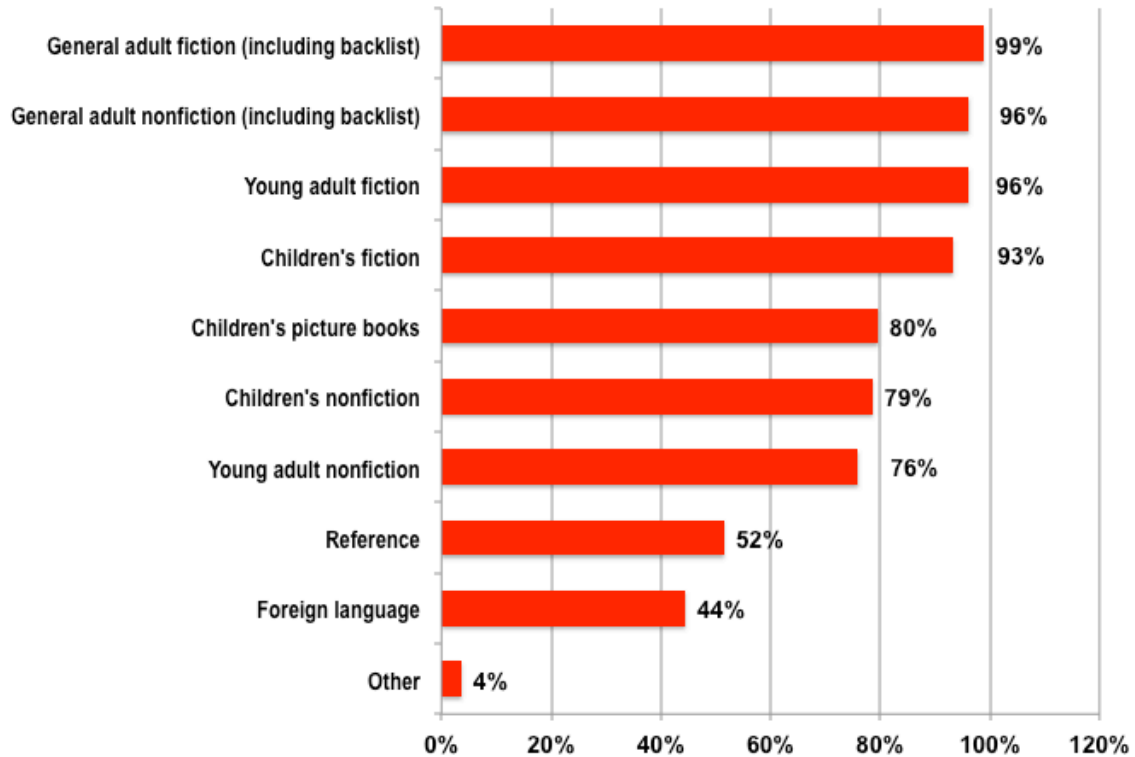
Table 18. Which categories of ebooks does your library center currently offer users?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
General adult fiction (including backlist)	98%	100%	99%	100%	100%	100%	100%	97%
General adult nonfiction (including backlist)	95%	98%	96%	97%	98%	97%	98%	93%
Young adult fiction	93%	98%	96%	100%	98%	99%	94%	93%
Children's fiction	88%	97%	93%	97%	97%	94%	87%	93%
Children's picture books	73%	81%	80%	94%	85%	76%	82%	75%
Children's nonfiction	80%	76%	77%	87%	86%	78%	76%	73%
Young adult nonfiction	80%	70%	76%	87%	79%	73%	84%	71%
Reference	47%	44%	55%	87%	54%	46%	62%	48%
Foreign language	36%	39%	52%	84%	48%	39%	60%	37%
Other	3%	4%	2%	6%	4%	2%	6%	4%

The general adult fiction and nonfiction percentages have not changed appreciably (if at all) over the course of these annual surveys. Much of the growth in the past five years has been fueled by young adult and children's titles, the growth of which continues. Availability of reference ebooks rebounded slightly in this survey.

Figure 28. Change in selected ebook categories
% of public libraries, 2010–2014

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

Adult vs. Children vs. YA Titles

As Figure 28 indicated, public libraries have been expanding their children's and young adult ebook collections. Still, adult titles vastly outnumber younger readers' ebook titles. In 2014, adult titles accounted for 71% of public libraries' collections, children's books accounted for 15%, and young adult ebooks accounted for 14%. The changes from last year are all less than 1% (adult ebooks, for example, dropped from 71.5% to 70.7%).

Figure 29. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library
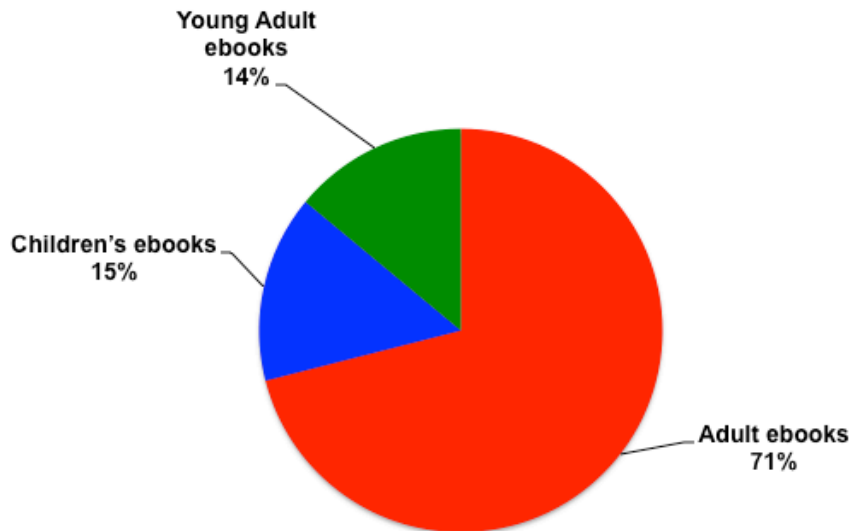*mean % each, all of public libraries, 2014*

Young Adult ebooks 14%
Children's ebooks 15%
Adult ebooks 71%

Table 19. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library
% of each, public libraries by population served and geographical region, 2012–2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Adult ebooks (mean)	69%	72%	72%	73%	70%	73%	71%	69%
Children's ebooks (mean)	16%	14%	15%	16%	16%	13%	15%	16%
Young Adult ebooks (mean)	15%	14%	14%	11%	14%	14%	13%	15%
2013								
Adult ebooks (mean)	68%	72%	73%	74%	69%	71%	72%	75%
Children's ebooks (mean)	17%	15%	14%	14%	17%	15%	15%	13%
Young Adult ebooks (mean)	15%	13%	13%	12%	14%	14%	13%	13%
2012								
Adult ebooks (mean)	75%	73%	74%	72%	74%	74%	74%	74%
Children's ebooks (mean)	13%	13%	13%	15%	13%	14%	13%	12%
Young Adult ebooks (mean)	13%	14%	14%	13%	13%	13%	13%	14%

Public libraries may have expanded their collections to include children's and YA ebooks, but the relative ratio of the number of adult to non-adult titles has remained fairly stable.

Figure 30. Change in young adult, children's, and adult ebooks (means)
% of each, all public libraries, 2012–2014
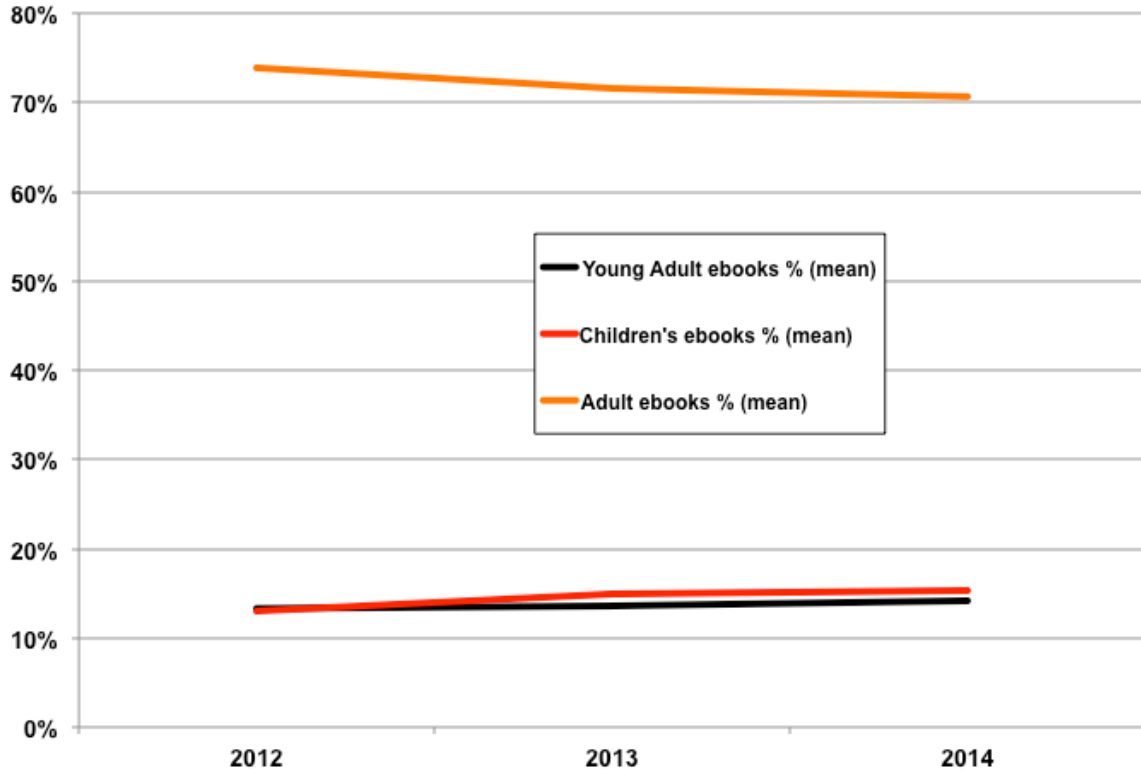
In-Demand Ebook Genres

In this part of the survey, we look at the specific fiction and nonfiction genres that are being demanded by public library patrons.

Fiction

The top fiction genre reported by public library respondents is, as always, "bestsellers," selected by 78%, followed by "mystery/suspense" at 58%, and "romance" at 56%.

Figure 31. What are your top three circulating or most requested <u>fiction</u> ebook categories? *% of public libraries, 2014*
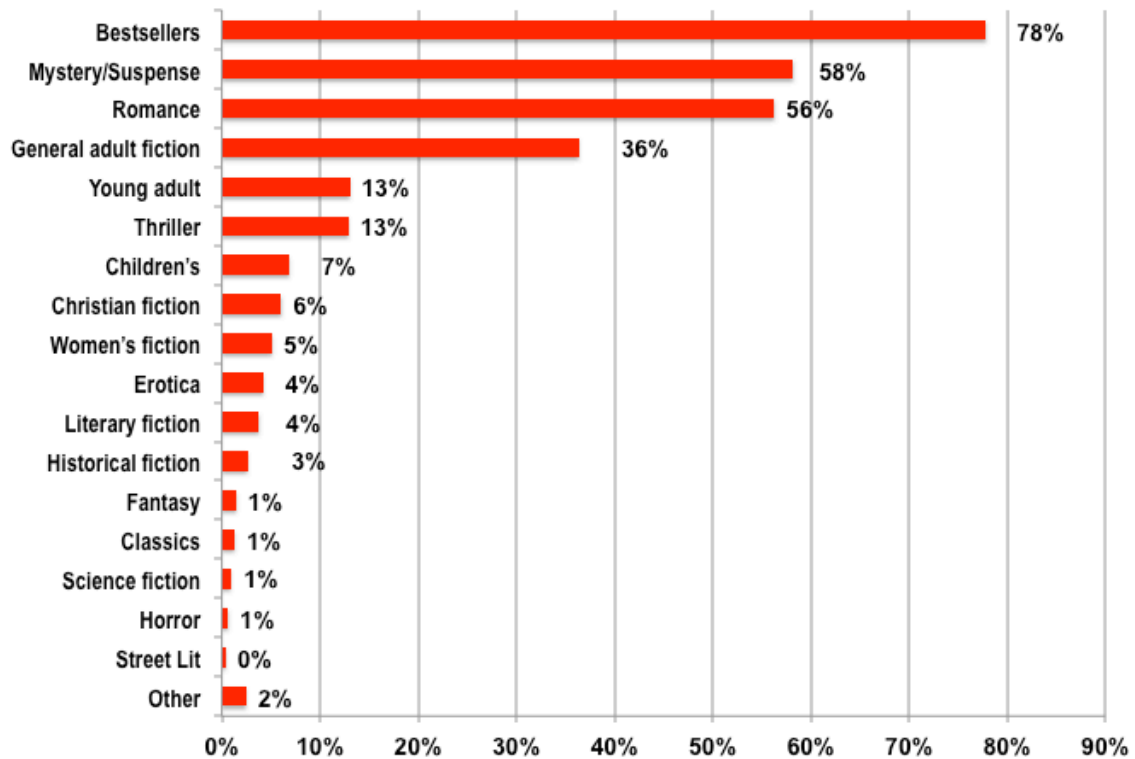
"Romance" is hottest in the larger libraries and "Christian fiction" is popular in the South.

Table 20. What are your top three circulating or most requested <u>fiction</u> ebook categories?
% of public libraries by population served and geographical region, 2014

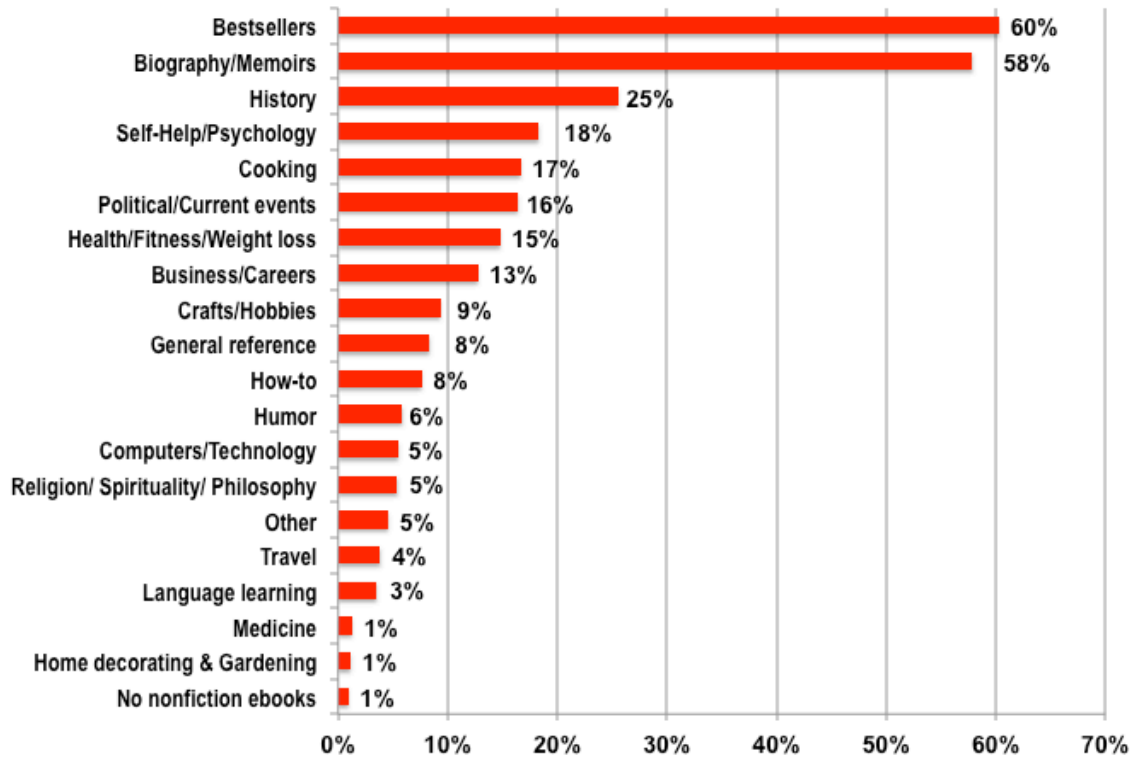|	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Bestsellers	76%	75%	86%	70%	70%	79%	85%	81%
Mystery/Suspense	61%	63%	51%	60%	61%	64%	61%	51%
Romance	44%	56%	65%	77%	60%	56%	52%	54%
General adult fiction	42%	39%	28%	43%	35%	42%	45%	30%
Young adult	13%	13%	16%	0%	13%	9%	15%	15%
Thriller	9%	12%	19%	17%	14%	10%	7%	16%
Children's	6%	8%	6%	7%	5%	3%	10%	10%
Christian fiction	7%	6%	6%	3%	5%	3%	0%	12%
Women's fiction	9%	4%	2%	0%	7%	4%	0%	6%
Erotica	1%	4%	5%	17%	8%	4%	6%	0%
Literary fiction	2%	5%	4%	3%	4%	5%	0%	4%
Historical fiction	4%	2%	2%	0%	2%	3%	2%	4%
Fantasy	1%	3%	1%	0%	4%	0%	2%	0%
Classics	3%	2%	0%	0%	2%	1%	3%	0%
Science fiction	1%	2%	0%	0%	2%	0%	2%	0%
Horror	1%	1%	0%	0%	0%	1%	0%	1%
Street Lit	0%	0%	1%	0%	0%	0%	0%	1%
Other	5%	3%	0%	0%	1%	1%	4%	4%

Figure 32. Highest circulating/most requested ebook fiction categories
% of public libraries, 2010–2014
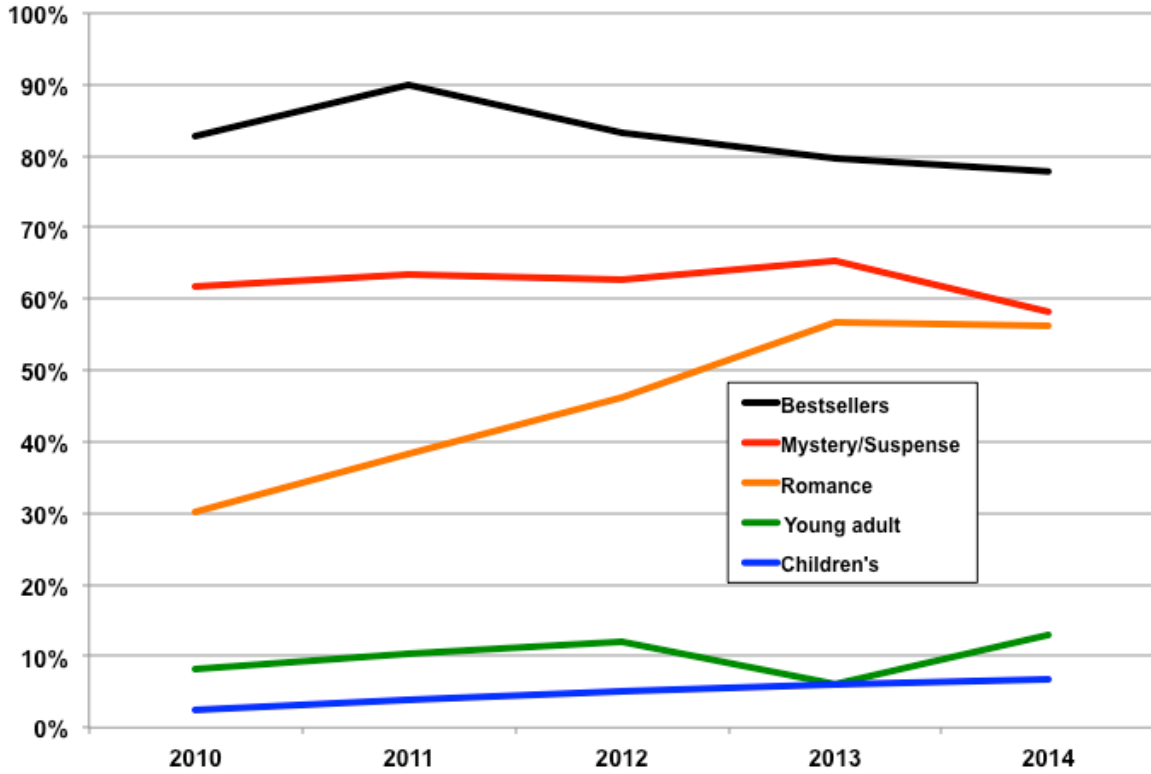
Nonfiction

"Bestsellers" and "biography/memoirs" top the list of most-requested nonfiction ebooks, selected by 60% and 58% of all respondents, respectively. "History" is a distant second at 25%. Next, "Self-Help/Psychology" narrowly outperformed "Cooking," which topped *Library Journal*'s list of highest circulating print book subjects last year.

Figure 33. What are your top three circulating or most requested <u>nonfiction</u> ebook categories?
% of public libraries, 2014

Category	%
Bestsellers	60%
Biography/Memoirs	58%
History	25%
Self-Help/Psychology	18%
Cooking	17%
Political/Current events	16%
Health/Fitness/Weight loss	15%
Business/Careers	13%
Crafts/Hobbies	9%
General reference	8%
How-to	8%
Humor	6%
Computers/Technology	5%
Religion/ Spirituality/ Philosophy	5%
Other	5%
Travel	4%
Language learning	3%
Medicine	1%
Home decorating & Gardening	1%
No nonfiction ebooks	1%

"History" titles are in greater demand among smaller libraries, while "business/careers" is in greater demand by larger libraries. "Bestsellers" are substantially in greater demand among the largest libraries.

Table 21: What are your top three circulating or most requested <u>nonfiction</u> ebook categories?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Bestsellers	58%	57%	64%	77%	56%	62%	66%	61%
Biography/Memoirs	57%	64%	55%	53%	63%	66%	42%	55%
History	32%	27%	19%	20%	30%	31%	14%	24%
Self-Help/Psychology	10%	22%	19%	23%	14%	16%	21%	23%
Cooking	18%	13%	20%	13%	21%	17%	17%	12%
Political/Current events	16%	19%	16%	10%	15%	22%	17%	14%
Health/Fitness/Weight loss	11%	15%	18%	17%	17%	8%	17%	16%
Business/Careers	9%	12%	16%	23%	12%	16%	12%	12%
Crafts/Hobbies	11%	9%	6%	10%	12%	5%	12%	8%
General reference	8%	9%	6%	10%	7%	6%	10%	11%
How-to	9%	8%	7%	3%	4%	4%	16%	9%
Humor	10%	5%	5%	0%	10%	6%	2%	3%
Computers/Technology	6%	3%	8%	3%	1%	6%	14%	5%
Religion/ Spirituality/ Philosophy	4%	7%	5%	3%	6%	4%	6%	6%
Travel	5%	4%	4%	0%	5%	4%	6%	1%
Language learning	2%	3%	7%	0%	1%	3%	2%	7%
Medicine	1%	1%	2%	0%	1%	1%	5%	0%
Home decorating & Gardening	0%	3%	0%	3%	3%	0%	0%	1%
Other	9%	3%	2%	7%	3%	4%	5%	7%
No nonfiction ebooks	2%	0%	1%	0%	2%	0%	0%	1%

Figure 34 shows that demand for "business/careers" ebooks has dropped since the height of the recession, but is up again in our most recent survey. Most other top genres are down slightly. One genre that is rising for the second survey in a row (since we added it in 2012) is "health/fitness/weight loss"—and is on a collision course with "cooking."

Figure 34. Highest circulating/most requested ebook nonfiction categories
*% of public libraries, 2010–2014*
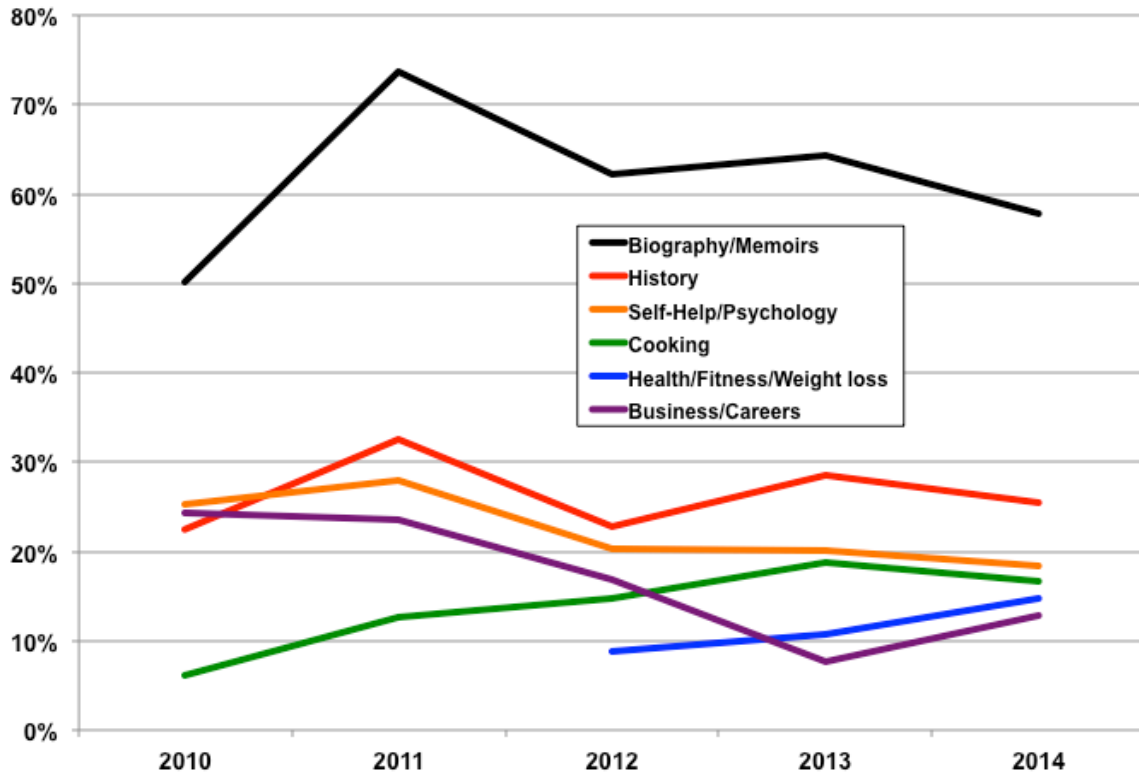
Alternative Books

One-third of respondents supplement their primary ebook selections by offering backlist ebooks (several of our verbatim responses indicate that backlist titles are seeing increased demand), 20% of respondents said they also offer ebooks from small or independent presses, and 14% currently offer ebook originals or self-published ebooks. Interestingly, six out of ten (59%) offer none of these "alternative" ebooks.

Two years ago, we asked public libraries if they would consider purchasing and/or licensing ebook originals or self-published ebooks, and the majority—69%—said they *would not*, and only 4% said they *already* carried ebook originals or self-published ebooks.

We asked this year's question in a slightly different way than before, making a direct year-over-year comparison difficult. But we can presume that the number of public libraries offering ebook originals rose ten percentage points in two years.

Figure 35. Do you supplement your main publisher ebook selections by offering any of the following?
% of public libraries, 2014
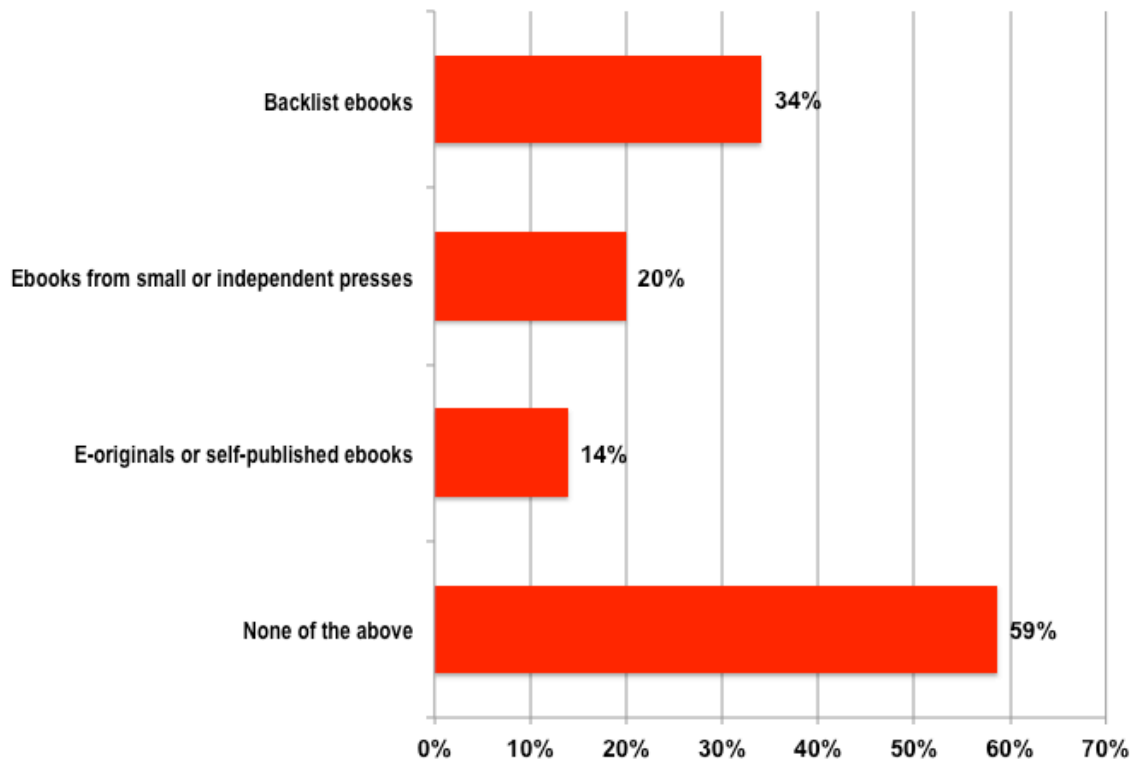
Larger libraries are more likely to offer alternative ebooks than smaller libraries. Backlist ebooks are the most popular of these types of titles, and may even be available through a library's regular vendor. E-originals or self-published ebooks find some favor among the largest libraries.

It's not just a question of having the funds to procure these types of titles, but also being able to integrate them with their ebook platform, particularly if they do not come from an oft-used vendor. In many cases these ebooks have fewer lending restrictions and therefore can fill gaps created by long wait times for more popular titles.

**Table 22. Do you supplement your main publisher ebook selections by offering any of the following?**
% of public libraries by population served and geographical region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Backlist ebooks	20%	30%	43%	60%	30%	35%	52%	30%
Ebooks from small or independent presses	19%	14%	23%	40%	21%	18%	31%	16%
E-originals or self-published ebooks	9%	12%	15%	36%	17%	7%	20%	13%
None of the above	68%	63%	56%	28%	62%	57%	40%	65%

OPAC Discoverability

Last year, we added a question that asked whether ebooks could be found through the library's general online public access catalog (OPAC). A year ago, three-fourths of respondents (75%) said that, yes, ebooks could be discovered via the library's OPAC. This has risen ten percentage points to 85% this year.

Figure 36. Are ebooks discoverable through your library's general OPAC?
% of public libraries, 2013/2014
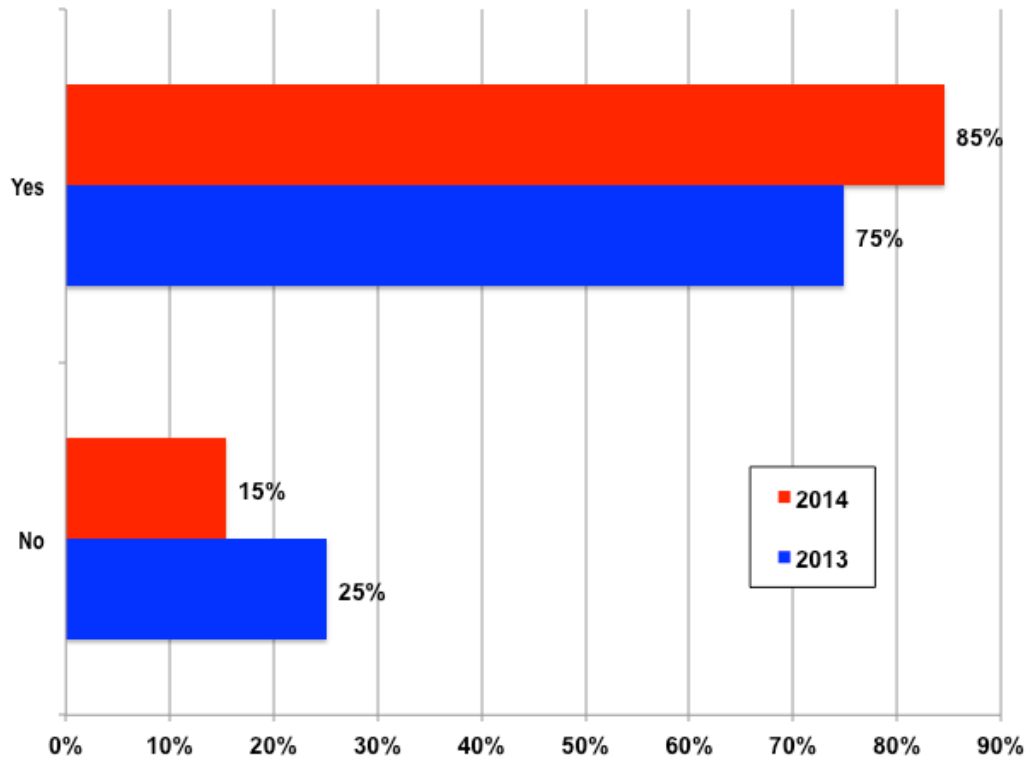
"Yes" responses increased across the board as libraries of all sizes integrated their ebook offerings with their general catalogs.

Table 23. Are ebooks discoverable through your library's general OPAC?
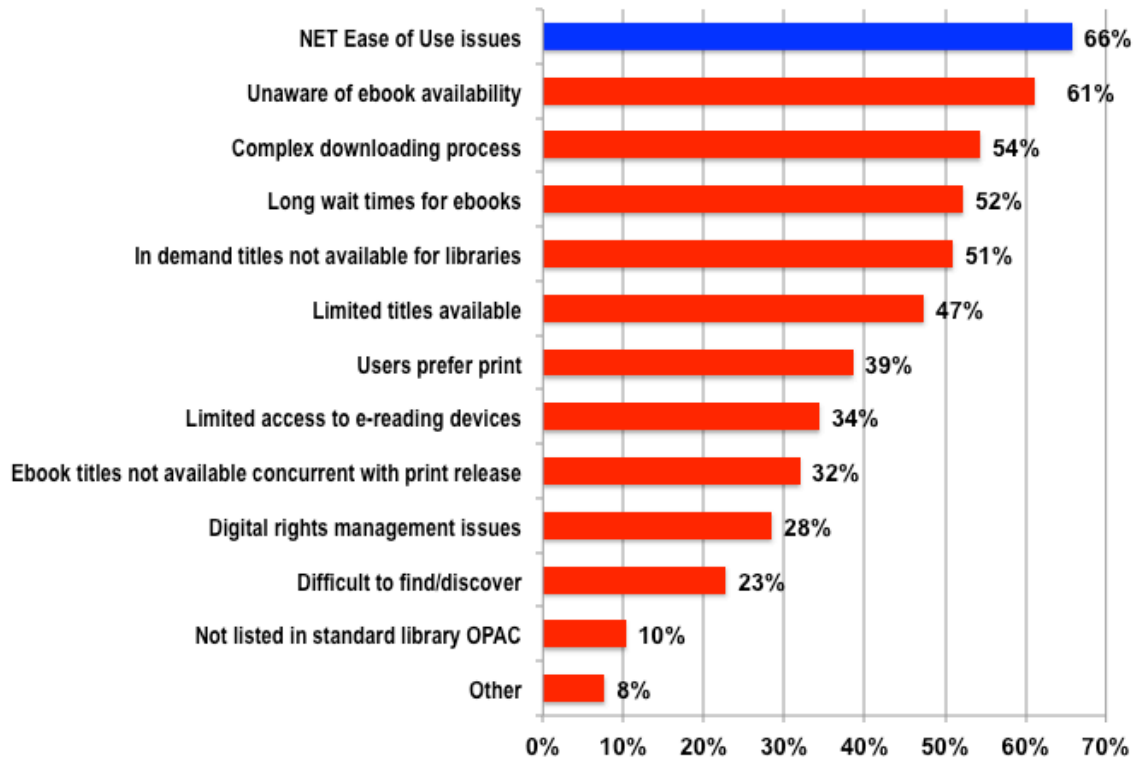*% of public libraries by population served and geographic region, 2013/2014*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Yes	80%	88%	83%	97%	90%	81%	77%	85%
No	20%	12%	17%	3%	10%	19%	23%	15%
2013								
Yes	66%	74%	80%	91%	81%	76%	70%	71%
No	34%	26%	20%	9%	19%	24%	30%	29%

Ereading Hindrances

What, if anything, keeps library users from reading ebooks? In previous surveys, the top hurdle for library users had been "in-demand titles not available," although this has dropped substantially this year—from 72% last year to a much lower 51%, the second lowest this item has been in the history of our survey.

"Ease of use" issues remain a challenge, so we aggregated all the "ease of use" issues and found that 66% of libraries find some kind of usability issue hinders the public from accessing the libraries' ebook collection—although this is down from 71% last year. "Unaware of ebook availability" (61%) is down only very slightly this survey. "Limited titles available" has dropped from 62% to 47%. We also note that "users prefer print" is up from 30% to 39% of respondents.

Figure 37. What hinders the public from reading your library's ebook content?
% of public libraries, 2014

Category	%
NET Ease of Use issues	66%
Unaware of ebook availability	61%
Complex downloading process	54%
Long wait times for ebooks	52%
In demand titles not available for libraries	51%
Limited titles available	47%
Users prefer print	39%
Limited access to e-reading devices	34%
Ebook titles not available concurrent with print release	32%
Digital rights management issues	28%
Difficult to find/discover	23%
Not listed in standard library OPAC	10%
Other	8%

Notice that "ease of use" issues overall were cited most often by larger libraries, as were "unaware of ebook availability," "in-demand titles not available" and "complex downloading process." "Long wait times," is the number one hindrance in the smallest libraries.

Table 24. What hinders the public from reading your library's ebook content?
*% of public libraries by population served and geographical region, 2014*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET Ease of Use issues	58%	63%	77%	76%	67%	62%	64%	67%
Unaware of ebook availability	53%	65%	66%	69%	60%	60%	67%	59%
Complex downloading process	44%	54%	65%	62%	53%	53%	58%	55%
Long wait times for ebooks	56%	53%	51%	48%	52%	68%	42%	47%
In demand titles not available for libraries	51%	55%	43%	66%	56%	60%	44%	44%
Limited titles available	46%	51%	46%	34%	43%	64%	37%	46%
Users prefer print	45%	33%	41%	28%	35%	38%	41%	41%
Limited access to e-reading devices	39%	32%	31%	38%	34%	35%	36%	33%
Ebook titles not available concurrent with print release	27%	29%	37%	52%	38%	37%	26%	26%
Digital rights management issues	29%	25%	33%	38%	42%	21%	23%	22%
Difficult to find/discover	21%	25%	23%	24%	21%	29%	20%	22%
Not listed in standard library OPAC	10%	8%	13%	10%	6%	11%	20%	10%
Other	10%	4%	7%	10%	8%	1%	10%	10%

Looking at a handful of ebook hindrances over time, most have been declining. "Unaware of ebook availability" remains rather prevalent, hinting that more marketing of ebooks to the public is needed. "Users prefer print" is at an all-time high, perhaps a result of folks trying ebooks and subsequently making their preference for print known to the library.

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

Figure 38. What hinders the public from reading your library's ebook content?
% of public libraries, 2010–2014
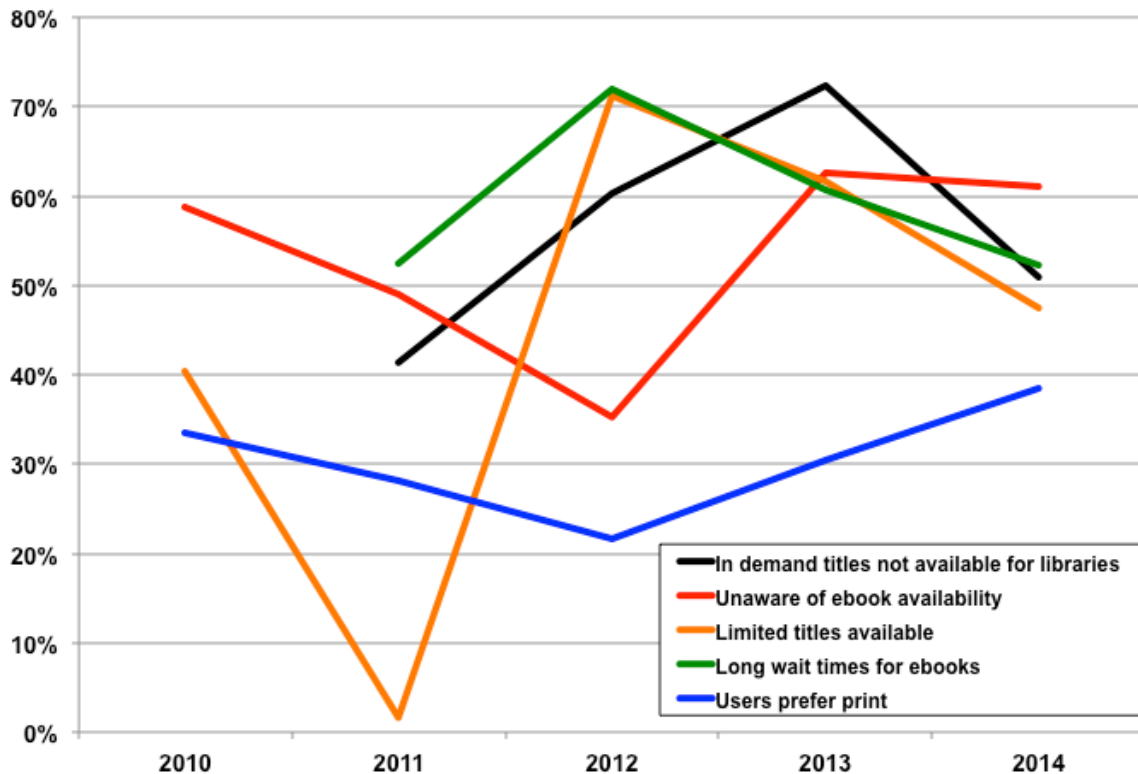
In 2011, "limited titles available" phrased as "limited collection."

In 2011, we began aggregating the assorted ease-of-use challenges to calculate a "net ease of use issues" hindrance. Ease of use problems peaked in 2012 as demand for ebooks peaked. For most libraries, ease of use issues have been declining. This year there was a rebound among 100,000–499,000-population served libraries. Small libraries have always been the least challenged by ease of use problems, although they also have the least demand for ebooks.

Figure 39. Net ease of use issues
% of public libraries by population served, 2011–2014
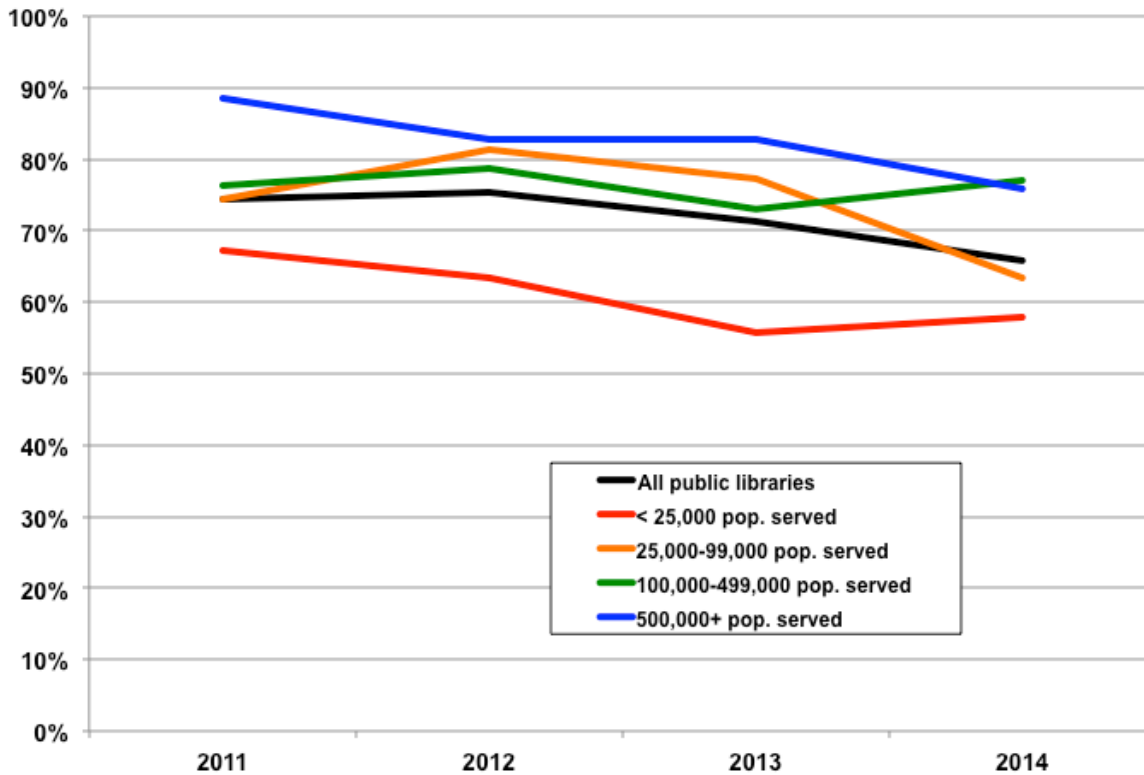
Last year, we added a question about patrons' voiced concerns (read: complaints) about accessing ebooks, and how often those concerns are voiced. The three concerns were:

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

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

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

Let's look at each of them in turn.

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

As collections get larger and more publishers loosen restrictions on library ebook lending, fewer library patrons are finding that the library doesn't have a digital copy of a book they are looking for. Last year, 50% of libraries reported hearing this concern either daily or weekly, and this is down to 33% this year. "Rarely" is up from 17% to 30%.

Figure 40. How often do patrons vocalize the following concern about ebooks in your library: "The library does not offer a digital copy of the title I want to borrow."
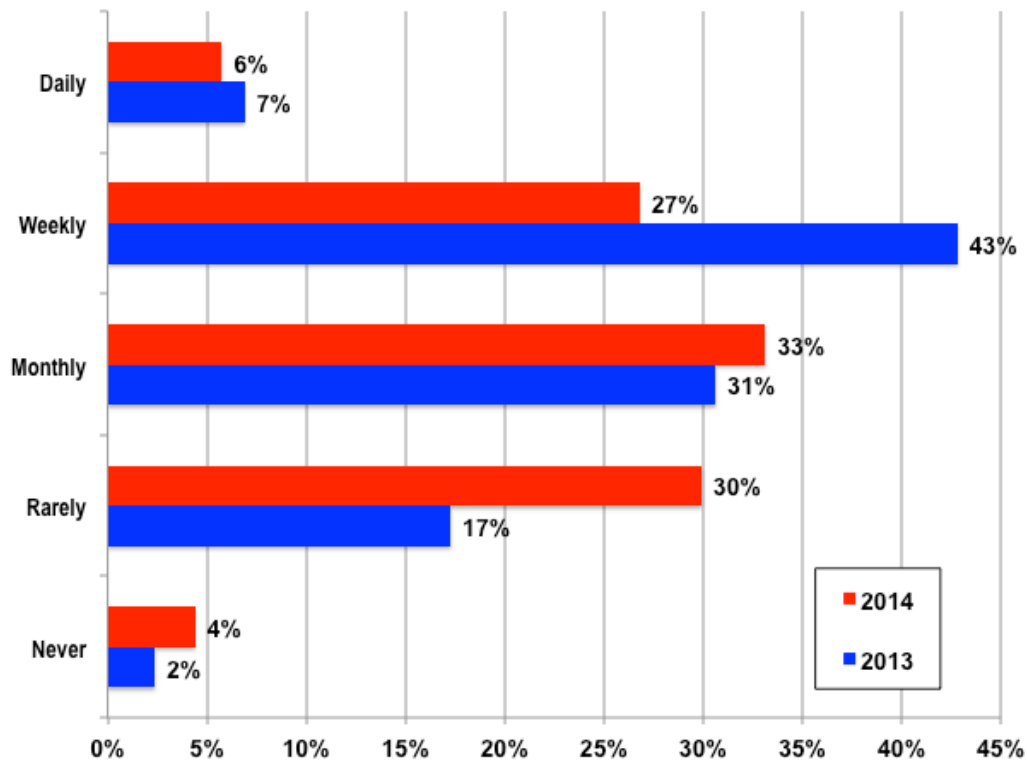*% of public libraries, 2013/2014*

Table 25. How often do patrons vocalize the following concern about ebooks in your library: "The library does not offer a digital copy of the title I want to borrow."
% of public libraries by population served and geographical region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Daily	3%	3%	12%	7%	3%	5%	8%	8%
Weekly	23%	26%	31%	31%	27%	24%	28%	28%
Monthly	31%	39%	29%	31%	31%	44%	24%	32%
Rarely	34%	29%	27%	28%	33%	24%	31%	31%
Never	9%	3%	1%	3%	6%	3%	9%	2%
2013								
Daily	1%	5%	11%	15%	6%	2%	6%	13%
Weekly	34%	40%	51%	47%	45%	38%	38%	50%
Monthly	31%	33%	30%	32%	26%	33%	43%	23%
Rarely	25%	22%	8%	6%	21%	23%	12%	11%
Never	9%	0%	0%	0%	1%	4%	1%	4%

"The wait time to borrow ebooks is too long"

A slightly more common concern is "the wait time to borrow ebooks is too long," with 8% hearing this concern on a daily basis, and a further 24% hearing it on a weekly basis. The percentage of libraries hearing this concern on a daily or weekly basis dropped from 42% to 32%. "Rarely" and "never" are both up.

Figure 41. How often do patrons vocalize the following concerns about ebooks in your library: "The wait time to borrow ebooks is too long."
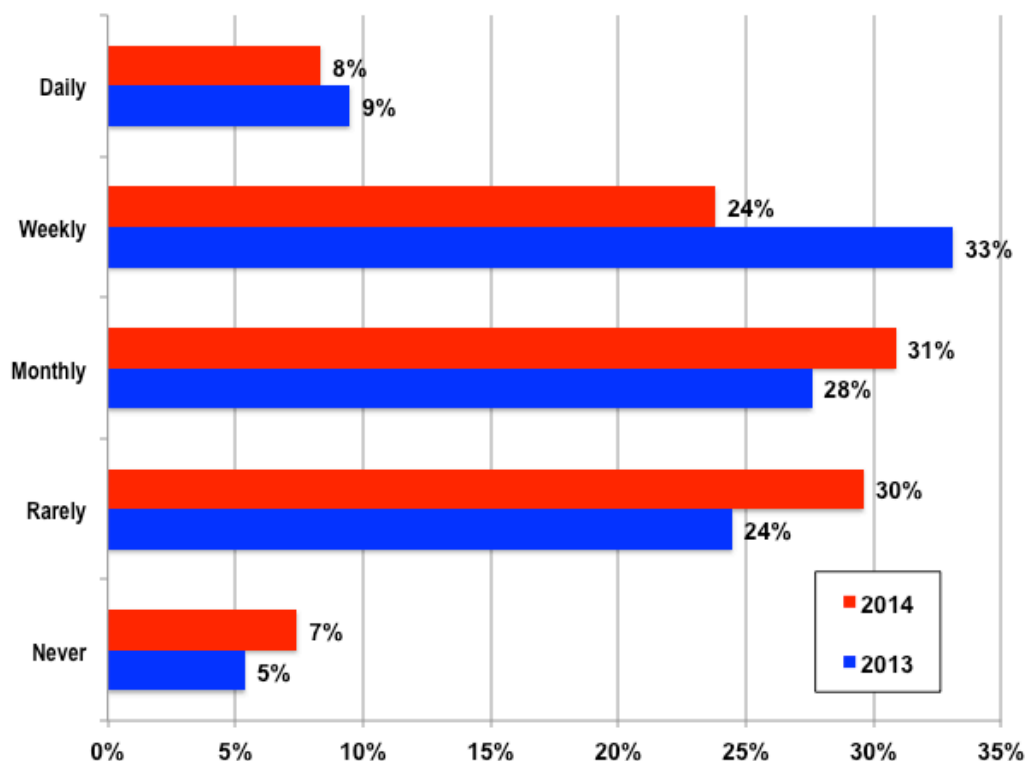*% of public libraries, 2013/2014*

Table 26. How often do patrons vocalize the following concerns about ebooks in your library: "The wait time to borrow ebooks is too long."
% of public libraries by population served and geographical region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Daily	7%	5%	15%	7%	8%	8%	9%	8%
Weekly	19%	25%	28%	21%	20%	25%	25%	26%
Monthly	34%	33%	24%	34%	33%	37%	23%	29%
Rarely	27%	32%	28%	31%	35%	27%	32%	25%
Never	13%	4%	5%	7%	5%	3%	11%	11%
2013								
Daily	4%	10%	13%	12%	10%	12%	4%	12%
Weekly	29%	38%	29%	32%	37%	31%	36%	30%
Monthly	34%	23%	27%	29%	31%	34%	17%	26%
Rarely	21%	25%	27%	24%	18%	19%	37%	24%
Never	11%	3%	3%	3%	3%	4%	6%	9%

"I need help downloading ebooks to my device"

Of the three vocalized concerns, help with downloading remains fairly common and unchanged from last year, with 84% of library personnel hearing it on a daily or weekly basis (only down three percentage points). Only 4% hear it rarely or never.

Figure 42. How often do patrons vocalize the following concerns about ebooks in your library: "I need help downloading ebooks to my device."
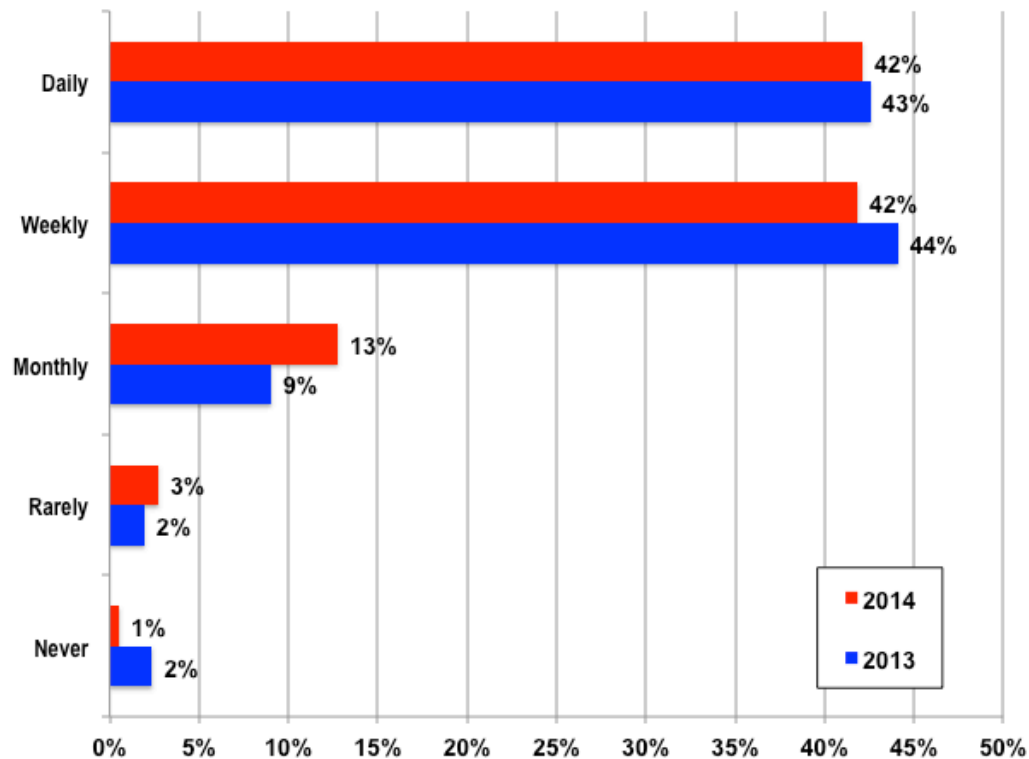*% of public libraries, 2013/2014*

Table 27. How often do patrons vocalize the following concerns about ebooks in your library: "I need help downloading ebooks to my device."
% of public libraries by population served and geographical region, 2013

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Daily	23%	46%	53%	57%	41%	38%	54%	41%
Weekly	46%	43%	38%	40%	42%	43%	34%	44%
Monthly	25%	9%	6%	3%	15%	13%	10%	12%
Rarely	4%	3%	2%	0%	2%	6%	2%	2%
Never	2%	0%	0%	0%	0%	0%	0%	2%
2013								
Daily	21%	45%	54%	59%	46%	34%	45%	46%
Weekly	50%	49%	35%	32%	44%	46%	41%	42%
Monthly	17%	5%	6%	9%	7%	14%	7%	9%
Rarely	6%	0%	2%	0%	3%	3%	2%	1%
Never	6%	0%	3%	0%	1%	3%	6%	2%

In Summary

Library collections continue to grow, and the biggest growth area continues to be children's and young adult ebook titles, both fiction and nonfiction. Total ebook collections remain predominantly adult-oriented, however.

The most popular fiction genres in ebook format are "bestsellers," "mystery/suspense," and "romance." In nonfiction, the most popular ebook subjects are "bestsellers," "biography/memoirs," and "history." Other subjects enjoying heightened demand from library users are "health and fitness," as well as "business/careers."

There is modest leaning toward providing lesser known ebooks, such as backlist or those from small or self-publishers, allowing libraries to pad their ebook offerings.

Ebooks are getting easier for patrons to use, and/or patrons are getting more ebook-savvy, as many of the traditional top hindrances are down in this survey. Ease-of-use issues are on the decline, as are availability issues, and the top impediment is the basic lack of awareness that the library even offers ebooks. Also, "users prefer print" is at an all-time high.

Still, the top "vocalized concern" from users is that they need help downloading ebook content to their ereading device, so ease of use issues definitely remain. Some libraries have found that regular classes and tutorials have helped combat these basic usability problems.

In Their Own Words

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

- *"Availability of current titles is the biggest problem—the wait is too long."*

- *"We can't obtain license for all popular titles. Wait lists are longer than for print copies. Licensing a popular ebook costs more than leasing a print copy."*

- *"The collection too limited; titles of interest always have holds."*

- *"Patrons who read ebooks still want print resources, too, while print-only readers have NO desire for ebooks. Young parents very much value print materials for their children over ebooks."*

- *"Ebooks are extremely popular at our library. They are checked out constantly and many patrons have trouble finding a book they want because most of our ebooks are already checked out. It is still a growing need and we try and put more of our budget into ebooks every year. We assist patrons with their ereaders on a daily basis and even offer one-on-one ereader classes."*

- *"Ebooks have become much easier for patrons to find and download at the library I work in and this contributes to popularity and increased demand. The library I work in has dedicated resources to ensure that staff are trained and provides ongoing training and support to the public as well."*

- *"Generally, we find that the ebook and print book collections complement each other with each feeding off the other. The e-audio service we recently purchased has been very well received so far. Patrons really appreciate not having to compete with the rest of the state for their etitles. With the implementation of Common Core and finding that our collection needs help in these areas we plan on moving more toward etitles in nonfiction for children and young adults to fill that need, particularly looking for a simultaneous user provider."*

- *"I get frustrated with the lack of coordination between having a given title in all formats, such as if we have a book title as an ebook, we should have it in print as well, if available, and vice versa."*

- *"I train staff on how to use our digital resources and we're setting up 'Petting Zoos' or Test Drive programs to help patrons use our ebooks and other digital resources. Sometimes I think that the process of getting an ebook is complicated for some users, but once they've gone through the process once or twice, patrons seem to get the hang of it. We do help a LOT of people who are using non-standard devices to download ebooks."*

- *"Most older patrons are going back to print titles for a better selection."*

- *"Some of these questions were difficult to answer in that the answers available were very black-and-white and our situation is a bit more 'gray.' For example, many of our ebooks are visible in our OPAC, but they're not* all *there (metered OverDrive titles are not, for example). Also, availability is not apparent in our catalog, our patrons must go from our catalog to the OverDrive site to check on availability."*

- *"Sometimes our older population isn't ready for downloading. Of course, some are—but print is still preferred format."*

- *"We offer a nice variety of ebooks. However, we need to increase the number of copies purchased for a title, especially as demand grows. Patrons are often not aware that we offer ebooks. Staff have to education the public on the services we provide as well as on how to use ebooks."*

- *"We struggle with managing selection, staying on top of the various business models employed by publishers and vendors, and getting our collection front and center with customers. This sounds like complaining and it's not: we do like acquiring content in formats that an increasing number of customers value without having to physically process materials."*

- *"We would see a large increase in use if ebooks were listed in our regular OPAC, rather than a separate OPAC (OverDrive). The next hurdle is promotion and marketing because we've had ebooks for ereaders for quite some time, but patrons are just unaware. All too often, a patron will hear another asking us about how to download an ebook, and they'll say, 'You have ebooks for check out on my Kindle?!' They have no idea, no matter what we do to promote them! Marketing is key, and that's where we need help!"*

- *"While ebooks are very popular, other electronic media such as streaming video and music are also becoming very popular, so we will have to really look at budget issues to satisfy all the econtent demand, not just ebooks."*

4. EBOOK BUDGETS AND BUYING

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

Ebooks and Materials Budgets

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

Last Year's Budget

Ebooks represented a mean of 7.0% (median 6.1%) of the last year's (2013) materials budget, with only 6% of respondents saying that none of the materials budget went for ebooks. Some libraries also obtain ebooks through their consortium (see later in this chapter) or via special grant.

Figure 43. Approximately what percentage of your library's materials budget did ebooks represent <u>last year (2013)</u>?
% of public libraries, 2014
<u>**Mean: 7.0%**</u>
<u>**Median: 6.1%**</u>
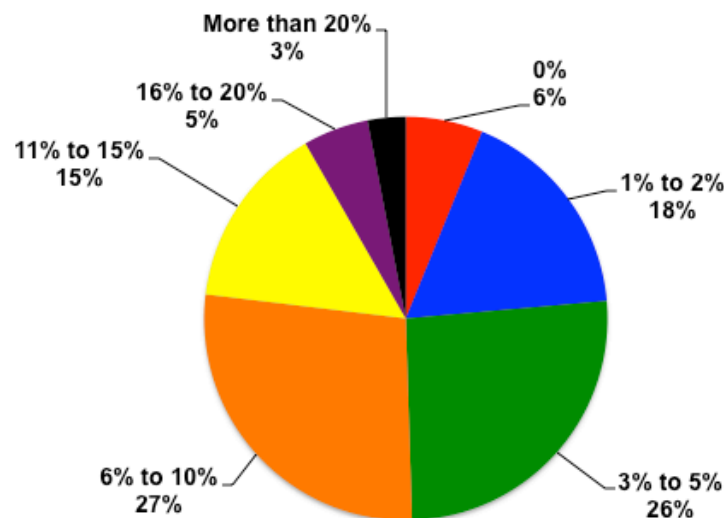
Table 28. Approximately what percentage of your library's materials budget did ebooks represent <u>last year (2013)</u>?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	12%	4%	2%	4%	2%	4%	0%	14%
1% to 2%	33%	13%	14%	0%	22%	26%	5%	14%
3% to 5%	19%	37%	22%	32%	28%	18%	42%	23%
6% to 10%	24%	27%	29%	28%	26%	31%	24%	28%
11% to 15%	4%	10%	25%	28%	16%	12%	22%	12%
16% to 20%	7%	6%	5%	4%	4%	9%	0%	6%
More than 20%	1%	3%	3%	4%	3%	0%	7%	3%
Mean %	5.2%	6.8%	8.4%	8.8%	6.9%	6.8%	8.1%	6.8%
Median %	3.5%	4.8%	7.8%	8.0%	4.9%	6.3%	6.6%	5.0%

This Year's Budget

In the current (2014) budget, ebooks have increased modestly as a percentage of the overall materials budget, representing a mean 8.6% (median 7.6%). Only 4% said that ebooks represented none of this year's budget.

Figure 44. Approximately what percentage of your library's materials budget do ebooks represent in the <u>current year (2014)</u>?
% of school libraries, 2014
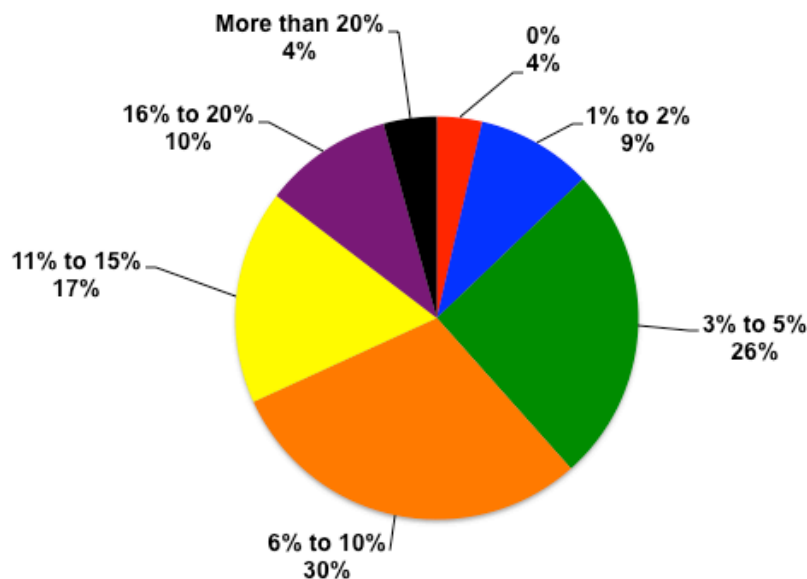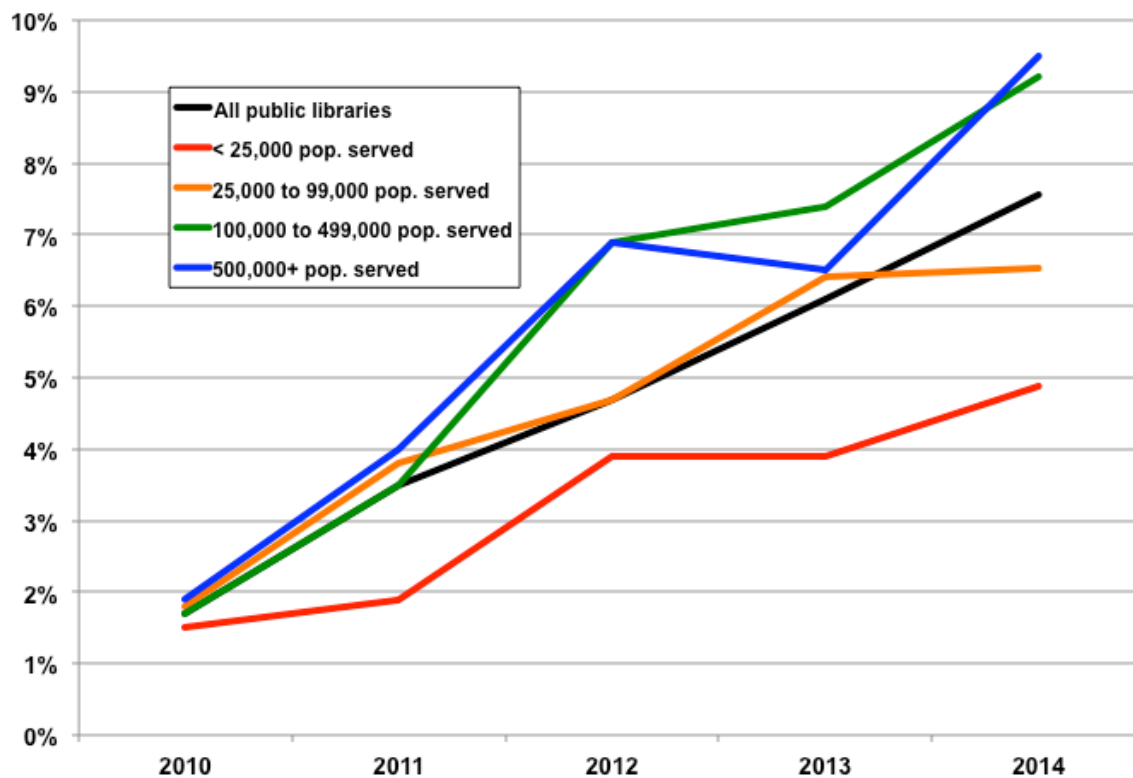<u>**Mean: 8.6%**</u>
<u>**Median: 7.6%**</u>

Table 29: Approximately what percentage of your library's materials budget do ebooks represent in the <u>current (2014) year</u>?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	7%	3%	2%	0%	1%	4%	0%	7%
1% to 2%	20%	7%	5%	0%	11%	17%	2%	6%
3% to 5%	24%	36%	22%	8%	29%	22%	29%	23%
6% to 10%	24%	33%	26%	48%	23%	33%	28%	35%
11% to 15%	9%	11%	26%	28%	22%	11%	22%	15%
16% to 20%	12%	7%	12%	12%	10%	10%	9%	11%
More than 20%	3%	3%	7%	4%	3%	4%	9%	3%
Mean %	7.3%	7.6%	10.1%	10.9%	8.6%	7.9%	10.0%	8.4%
Median %	4.9%	6.5%	9.2%	9.5%	7.5%	6.9%	8.6%	7.6%

In four years, ebooks have grown from just under 2% of public libraries' materials budgets to more than 7% for all but the smallest libraries.

Figure 45: <u>Median</u> percentage of current materials budget represented by ebooks
public libraries by population served, 2010–2014

How much of the materials budget will ebooks represent five years hence—in 2019? On average, public libraries predict that ebooks will account for 14.1% of the materials budget in five years (median 14.0%). Only 1% forecast that ebooks will not represent any part of the materials budget in 2019.
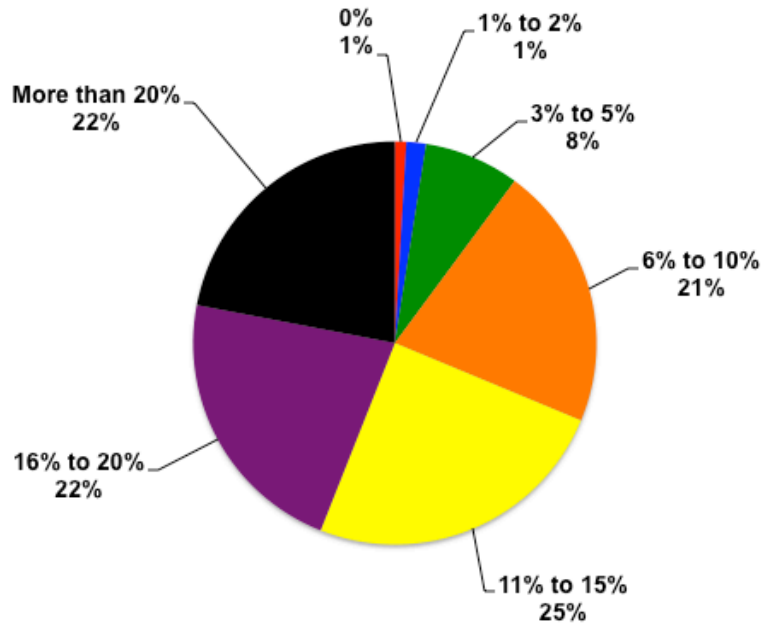
Figure 46. Approximately what percentage of your library's materials budget do you predict ebooks will represent <u>in 5 years (2019)</u>?
% of public libraries, 2014
<u>**Mean: 14.1%**</u>
<u>**Median: 14.0%**</u>

Table 30. Approximately what percentage of your library's materials budget do you predict ebooks will represent <u>in 5 years (2019)</u>?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	1%	1%	0%	0%	1%	0%	0%	2%
1% to 2%	5%	0%	0%	0%	3%	4%	0%	0%
3% to 5%	14%	7%	4%	4%	5%	14%	4%	8%
6% to 10%	30%	23%	16%	12%	24%	18%	18%	22%
11% to 15%	16%	33%	25%	20%	26%	26%	25%	22%
16% to 20%	14%	20%	30%	28%	16%	20%	27%	26%
More than 20%	20%	14%	26%	36%	25%	18%	26%	20%
Mean %	12.1%	13.4%	15.9%	16.9%	14.1%	13.1%	15.6%	14.2%
Median %	10.5%	13.2%	16.8%	18.0%	13.6%	13.1%	16.5%	14.3%

Looking at five surveys' worth of five-year projections, we see that public libraries have been increasingly of the opinion that ebooks will grow, although their forecasts have leveled off in our most recent survey. In 2010, respondents felt that in five years (that is, in 2015) ebooks would represent 7.3% of their materials budgets. And when you consider that 2015 is only a year away, and ebooks already currently account for 7.6% of libraries' materials budgets, it seems we are "ahead of schedule"—unless there is an abrupt collapse in demand for ebooks.

Figure 47: Median percentage of materials budget represented by ebooks in five years *public libraries by population served, 2010–2014*
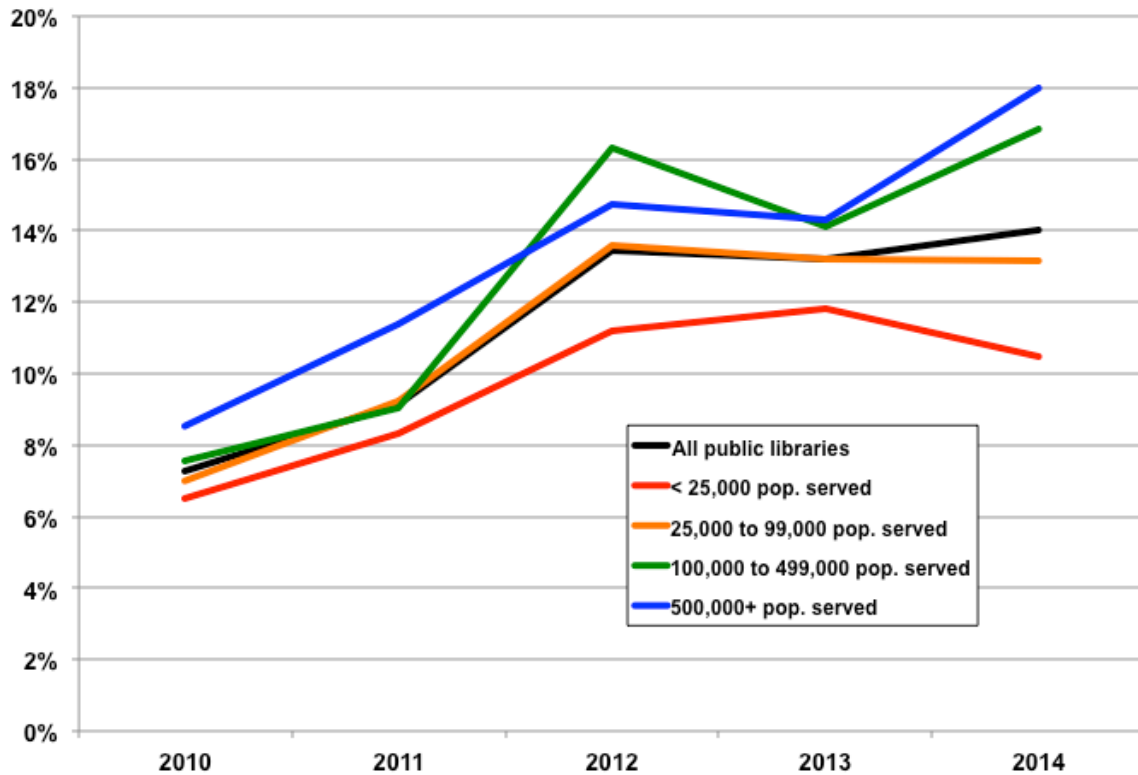
Ebooks Purchased

A new question we added in this year's survey asked how many ebooks they purchased in the last complete fiscal year. On average, libraries bought a mean 1,933 (median 565) ebook volumes in their last fiscal year.

Figure 48. How many ebook volumes did your library purchase or license (independent of consortially supplied ebooks) in your last complete fiscal year?
% of public libraries, 2014
Mean: 1,933
Median: 565
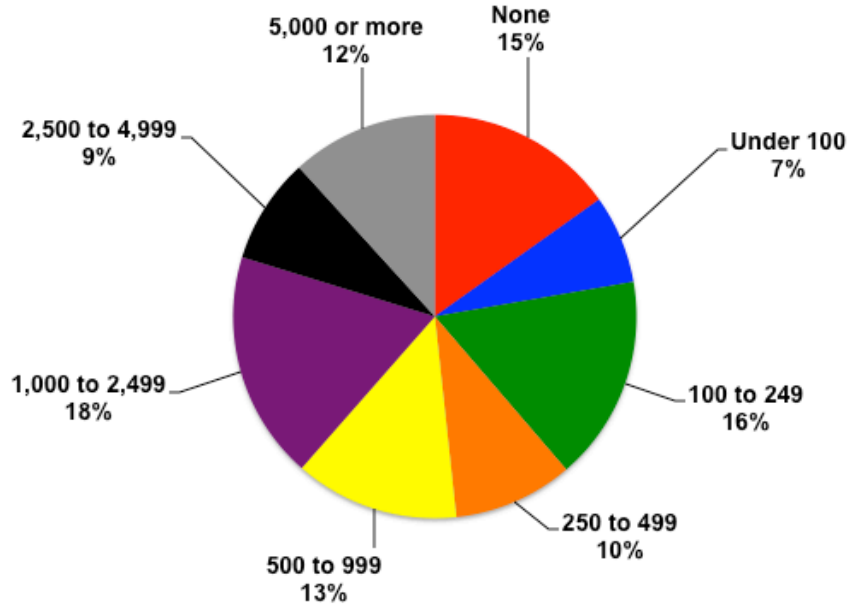
Table 31. How many ebook volumes did your library purchase or license (independent of consortially supplied ebooks) in your last complete fiscal year?
% of public libraries by population served and geographic region, 2014

|	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
None	30%	16%	3%	0%	12%	24%	7%	16%
Under 100	19%	4%	2%	0%	8%	12%	2%	5%
100 to 249	20%	24%	9%	4%	16%	19%	16%	15%
250 to 499	11%	12%	9%	0%	10%	12%	8%	9%
500 to 999	10%	18%	12%	4%	18%	9%	10%	13%
1,000 to 2,499	9%	12%	36%	8%	17%	15%	19%	21%
2,500 to 4,999	0%	7%	17%	13%	12%	5%	16%	4%
5,000 or more	1%	7%	12%	71%	7%	4%	23%	16%
Mean	719	1,574	3,371	4,589	2,188	1,390	2,804	1,765
Median	109	361	1,642	6,470	633	214	1,552	666

Current Spending

A companion to the previous question, we also asked how much libraries spent on ebooks in the last complete fiscal year. We rephrased the question in 2014, to ask about the "last complete fiscal year" rather than the "current fiscal year." In their most recent complete fiscal year, public libraries spent on average $57,342 (median $13,002) on ebooks. Four percent of respondents said that all ebooks are provided by the state, district, or consortium.

Figure 49. Approximately how much did your library spend on ebooks in your last complete fiscal year?
% of public libraries, 2014
Mean: $57,342
Median: $13,002
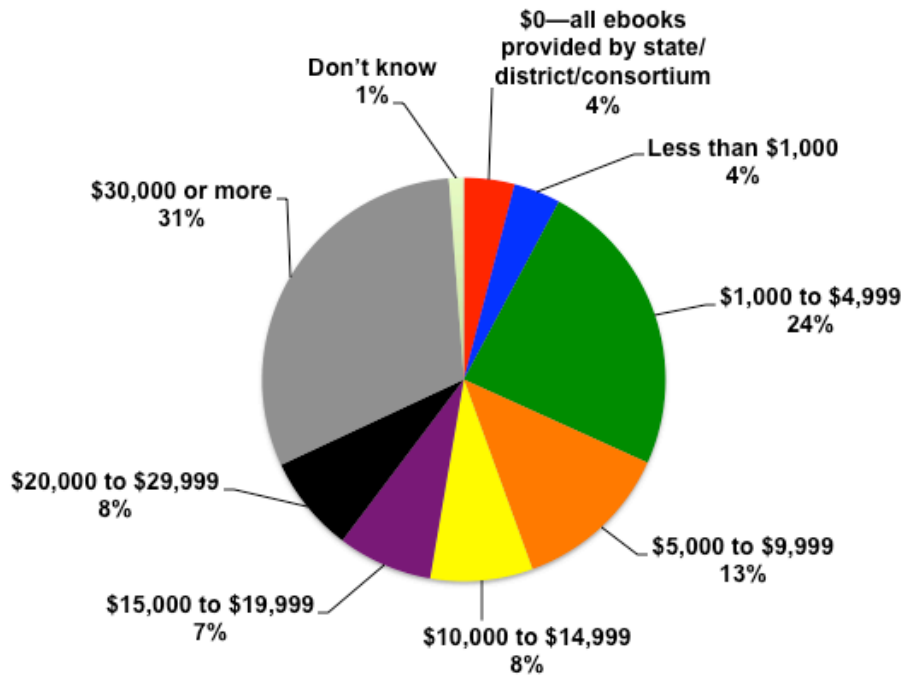
As is expected, the larger the library, the more it has spent on ebooks. A look at the "mean" row shows that there were some outliers in the 500,000+-population served group: mean spending for that group is $345,643, while the median is a more reasonable $39,130.

Table 32. Approximately how much did your library spend on ebooks in your last complete fiscal year?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
$0—all ebooks provided by state/district/consortium	10%	1%	2%	0%	1%	7%	3%	5%
Less than $1,000	13%	0%	0%	0%	4%	7%	0%	3%
$1,000 to $4,999	48%	33%	3%	0%	24%	32%	12%	23%
$5,000 to $9,999	14%	20%	7%	0%	13%	13%	14%	12%
$10,000 to $14,999	6%	7%	13%	0%	9%	12%	4%	7%
$15,000 to $19,999	1%	11%	11%	0%	11%	4%	4%	9%
$20,000 to $29,999	3%	7%	13%	8%	10%	5%	12%	6%
$30,000 or more	4%	21%	49%	92%	29%	17%	51%	34%
Don't know	1%	1%	2%	0%	1%	4%	0%	0%
Mean	$5,660	$22,051	$70,447	$345,643	$52,172	$16,389	$144,571	$53,213
Median	$3,210	$8,833	$30,000	$39,130	$14,678	$5,855	$30,473	$14,192

We introduced a question about current spending on ebooks in 2011. Libraries serving populations in excess of 500,000 spent quite a bit early on, but have tempered their spending. From 2013 to 2014, median ebook spending dipped ever so slightly, particularly among 25,000 to 499,999 population served group. This may be due to the rephrasing of the question, where we ask about their last complete fiscal year, rather than "this year."

Figure 50: Median spending on ebooks for the current fiscal year[5]
*public libraries by population served, 2011–2014*
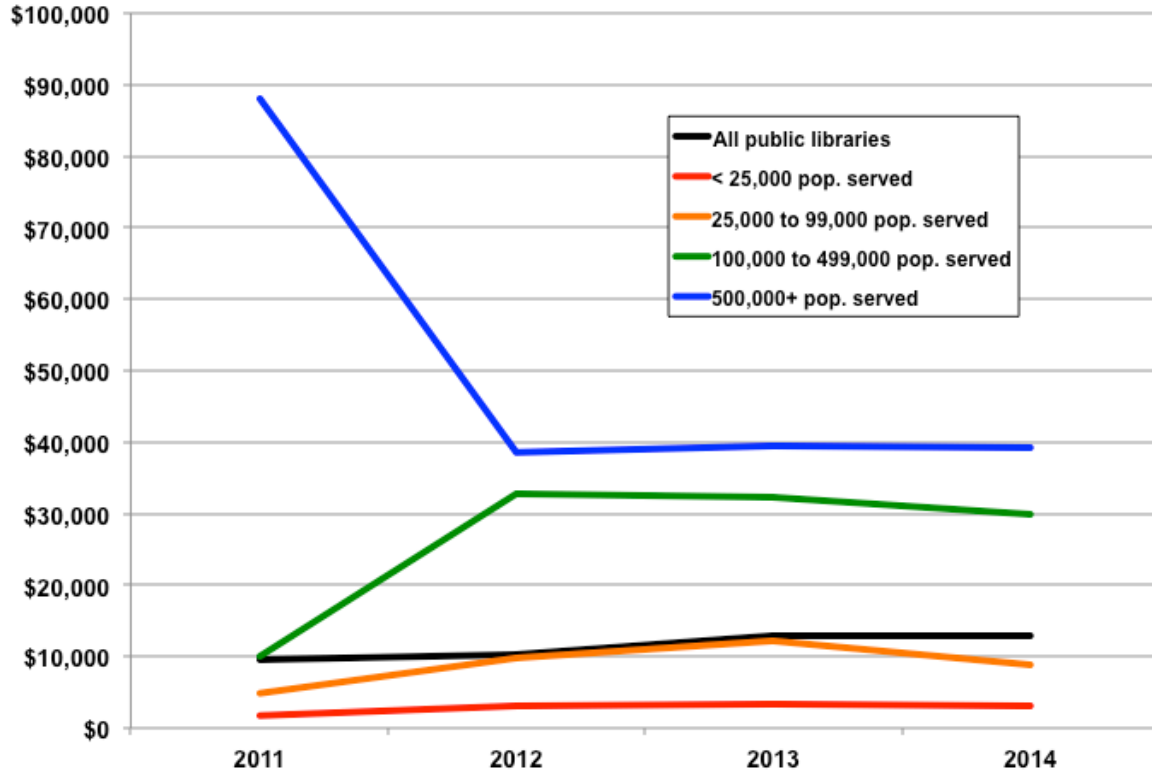
Reallocation of Resources

Two-thirds of public libraries (66%) said that they have had to reallocate funds from other areas of their materials budgets to pay for ebooks.

Although we have asked about the reallocation of resources since our first survey in 2010, we phrased it a little differently starting with last year's survey. In the past, we asked about reallocation of funds from "physical materials formats." In 2013 and 2014, we asked if libraries have had to reallocate funds from "other areas," and broke the question into two parts. So when we look at the historical time series in Figure 53, bear this rephrasing in mind.

Figure 51. Have you had to reallocate other areas of your materials budget to pay for ebooks?
% of public libraries, 2014

No
34%

Yes
66%
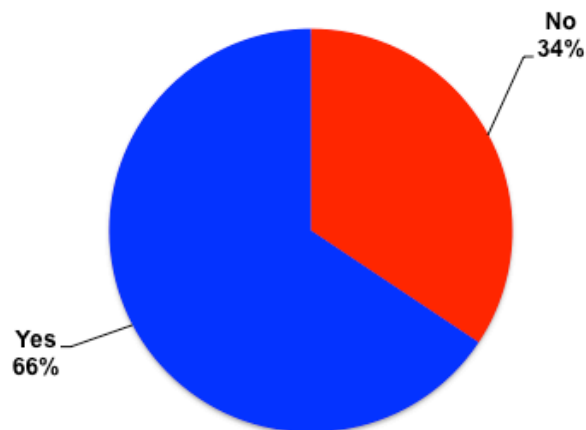
We had typically found that "print" is somewhat cannibalized by the resource allocation, but this year, the reference budget was raided to a slightly greater extent (58% of the two-thirds of libraries that reallocate other areas of the budget) than the print budget (56%). Eight percent take a little from all these areas to pay for ebooks.

Figure 52. If yes, from what areas or formats?
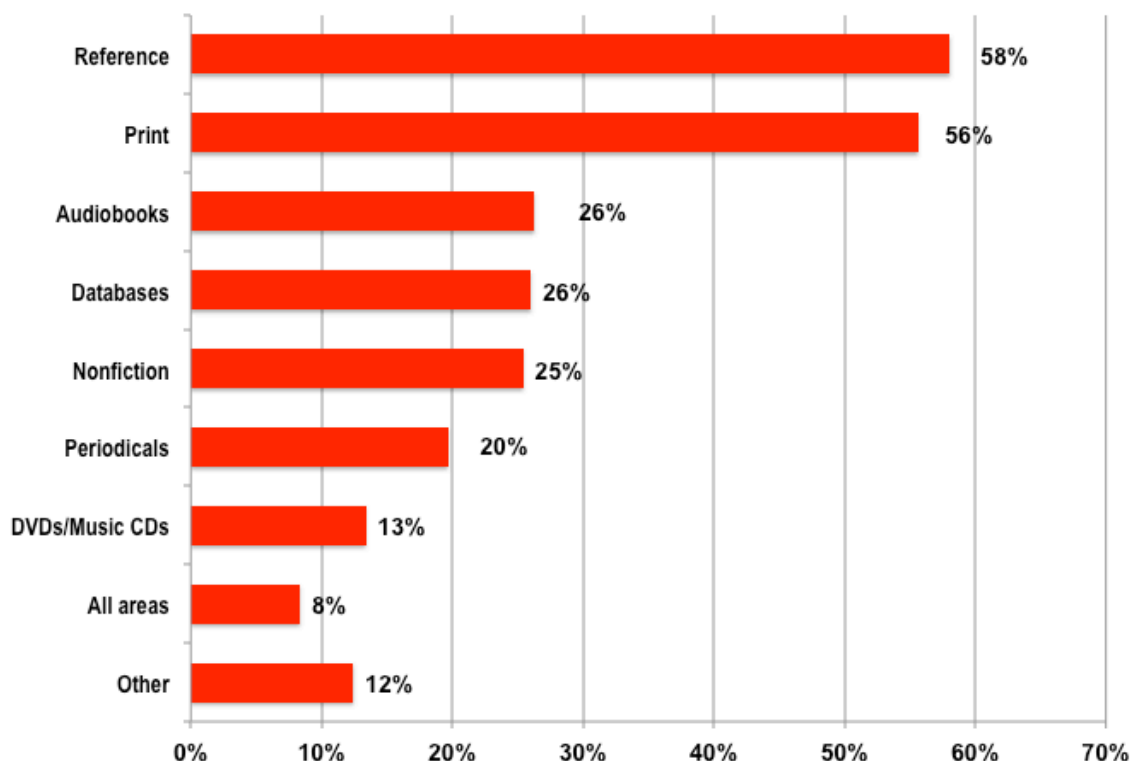*% of public libraries that reallocate other areas of the budget, 2014*

Table 33. Have you had to reallocate other areas of your materials budget to pay for ebooks?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No	44%	35%	30%	12%	27%	27%	32%	46%
Yes	56%	65%	70%	88%	73%	73%	68%	54%
If yes, from what areas or formats did you transfer funds for ebooks?								
Reference	45%	63%	63%	64%	64%	59%	45%	57%
Print	45%	44%	79%	50%	51%	47%	58%	67%
Audiobooks	20%	27%	26%	32%	29%	21%	28%	27%
Databases	14%	19%	40%	36%	30%	20%	24%	27%
Nonfiction	16%	10%	44%	32%	20%	20%	33%	32%
Periodicals	18%	19%	19%	27%	26%	15%	14%	20%
DVDs/Music CDs	9%	15%	9%	27%	12%	10%	13%	18%
All areas	9%	6%	12%	0%	7%	3%	9%	14%
Other	14%	10%	12%	14%	14%	5%	19%	14%

Figure 53. Libraries that have had to reallocate other areas of their materials budget to pay for ebooks*
*% of public libraries by population served, 2010–2014*
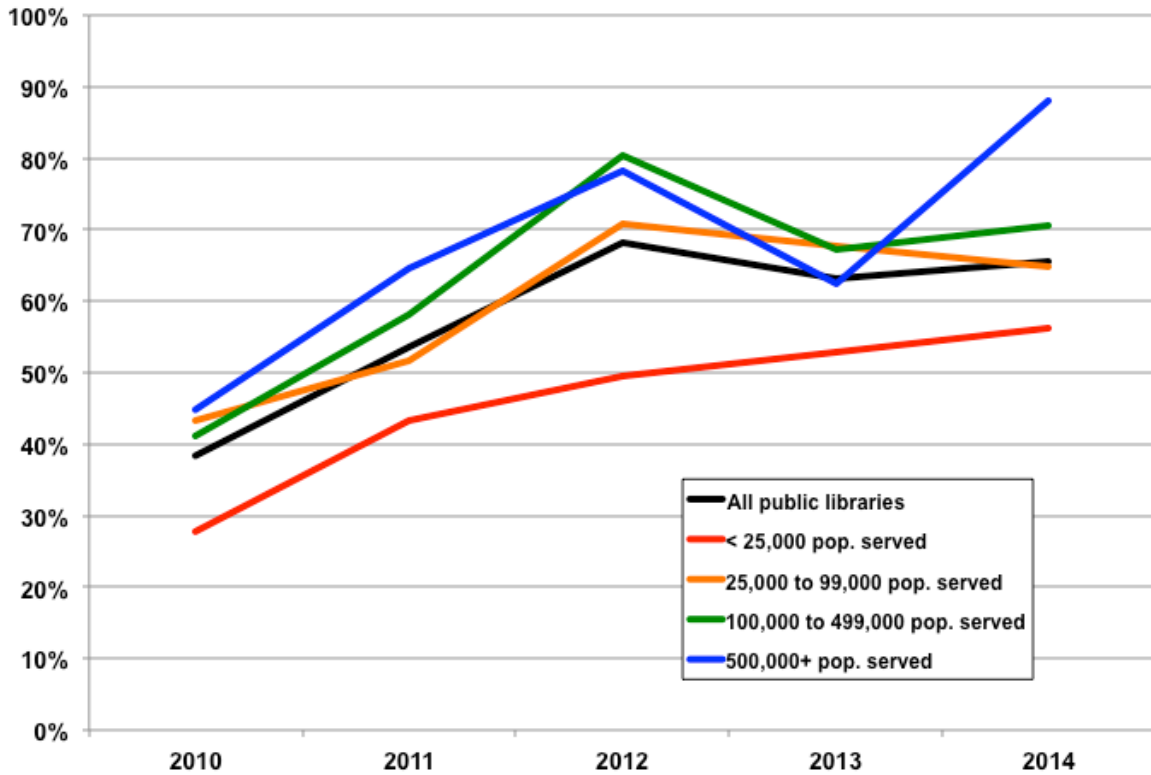
Note: In 2010–2012, "other areas" was phrased as "physical materials formats."
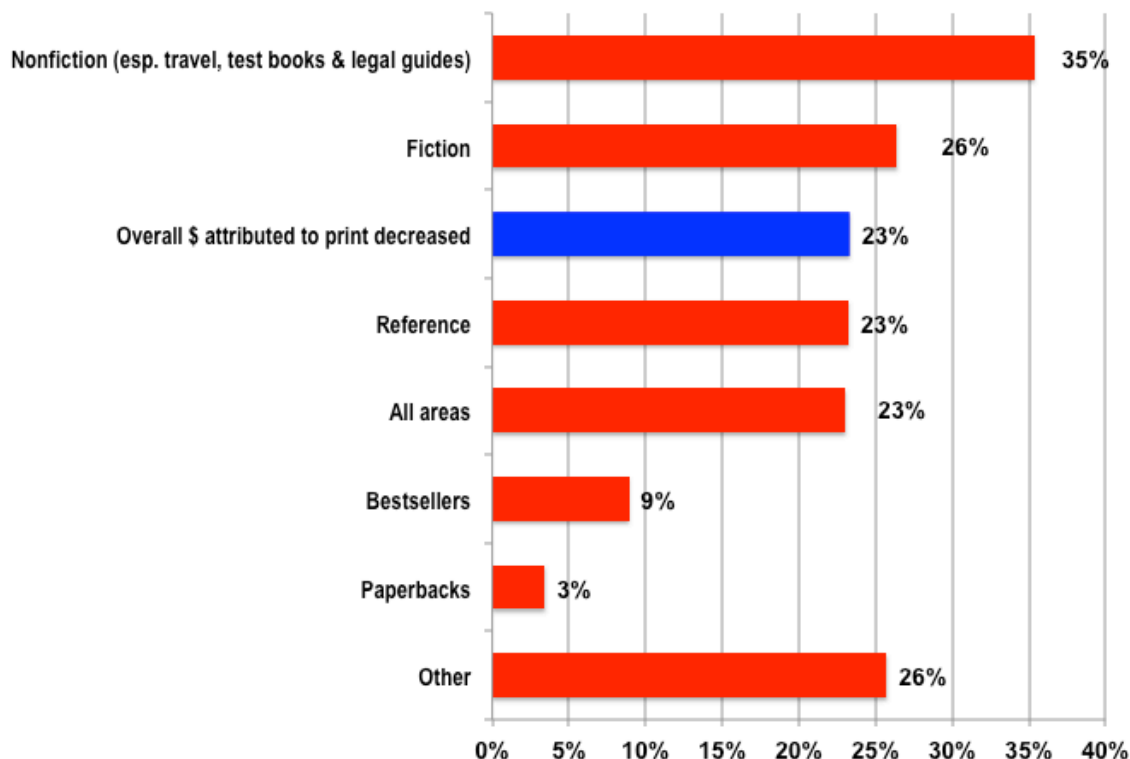
Impact on Print Book Purchasing

This survey, we added a new question that asked about the extent to which libraries' ebook purchasing was having any impact on the number of print books they bought. Ebooks are indeed having an impact on print collections: one-fifth (21%) of libraries said that they now buy fewer print books, although 71% said that ebooks were having no influence on their print book purchasing. On the plus side, no one said they "buy no print books now."

Figure 54. How has the addition of ebooks to your collection influenced your print book purchasing?
% of public libraries, 2014
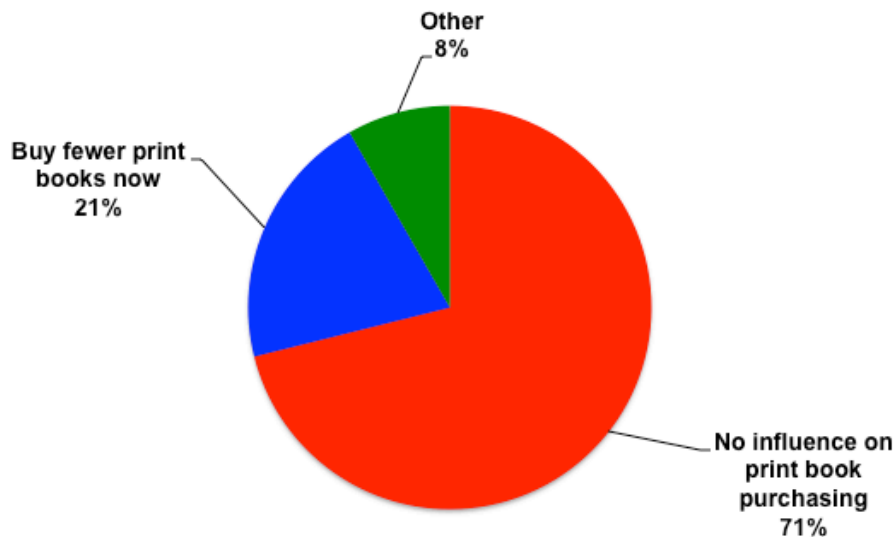
As a follow-up, of those who said they were buying fewer print books, what subjects were getting the bulk of the cuts? Nonfiction was the top response, selected by 35%. Nonfiction is pretty broad, but a cursory tabulation of text answers revealed that they were buying fewer books in the areas of travel, test prep, and legal guides. (Declines in these topic areas may not be 100% due to ebook purchasing, but to the Internet in general.) Other top categories seeing declines in print book purchasing are fiction (26%) and reference (23%). However, 23% also said that they were buying fewer print books in "all areas" while 23% said that they were buying fewer print books because they had less overall money allotted to print book acquisition.

Figure 55. If buying fewer print books, in what subjects?
% of public libraries buying fewer print books, 2014

In general, the larger the library, the more likely it is that they are buying fewer print books.

Table 34. How has the addition of ebooks to your collection influenced your print book purchasing?
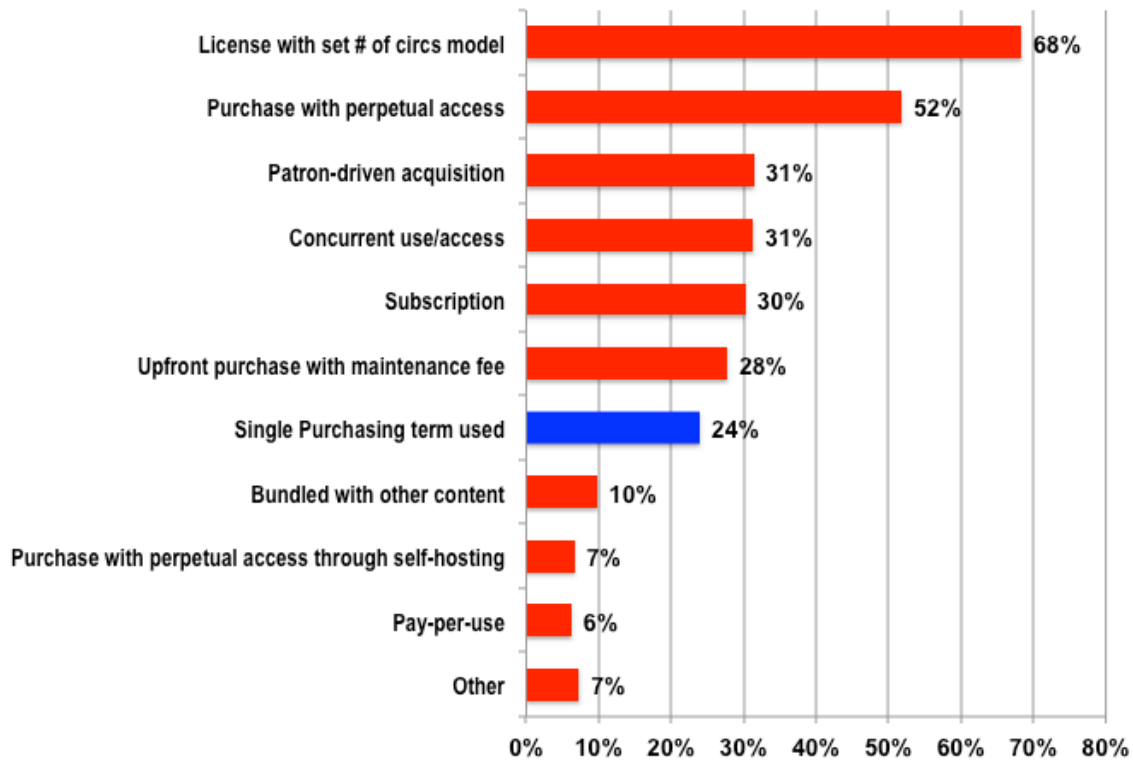*% of public libraries buying fewer print books, by population served and geographic region, 2014*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No influence on print book purchasing	74%	83%	59%	44%	67%	80%	66%	71%
Buy fewer print books now	18%	10%	30%	44%	22%	15%	24%	22%
Buy no print books now	0%	0%	0%	0%	0%	0%	0%	0%
Other	7%	6%	11%	12%	11%	5%	10%	7%
If buying fewer print books, in what subjects?								
Nonfiction (esp. travel, test books & legal guides)	36%	43%	25%	45%	36%	35%	39%	33%
Fiction	21%	29%	31%	18%	29%	29%	0%	35%
Overall $ attributed to print decreased	0%	71%	25%	18%	35%	0%	38%	17%
Reference	21%	29%	25%	18%	13%	25%	46%	20%
All areas	21%	0%	31%	27%	23%	43%	22%	16%
Bestsellers	7%	0%	13%	9%	13%	0%	0%	13%
Paperbacks	0%	29%	0%	0%	6%	11%	0%	0%
Other	50%	0%	25%	18%	19%	26%	34%	27%

Purchasing Terms

A perennial question on our survey asks about purchasing terms, which has been a contentious topic among libraries since the advent of ebooks—or, in fact, our survey. When acquiring ebooks, the majority of libraries—68%—say they "license with a set number of circs," up from 62% last year. This had been as low as 24% in 2012. Just over one-half (52%) "purchase with perpetual access," down slightly from last year (58%). "Patron-driven acquisition" continues its climb, and is up to an all-time high of 31% (see next question below) "Subscriptions" are down this year, from 38% to 30%. "Concurrent use/access" is used by 31%.

Most libraries take advantage of more than one purchasing scheme, depending upon what a particular vendor will allow. We calculated that barely a quarter (24%) of public libraries use a single purchasing term, down three percentage points from last year.

Figure 56. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries, 2014

The largest libraries are the most likely to use more than one type of purchasing terms: 40% of small libraries only use one type of purchasing terms vs. 8% of very large libraries.

Table 35. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
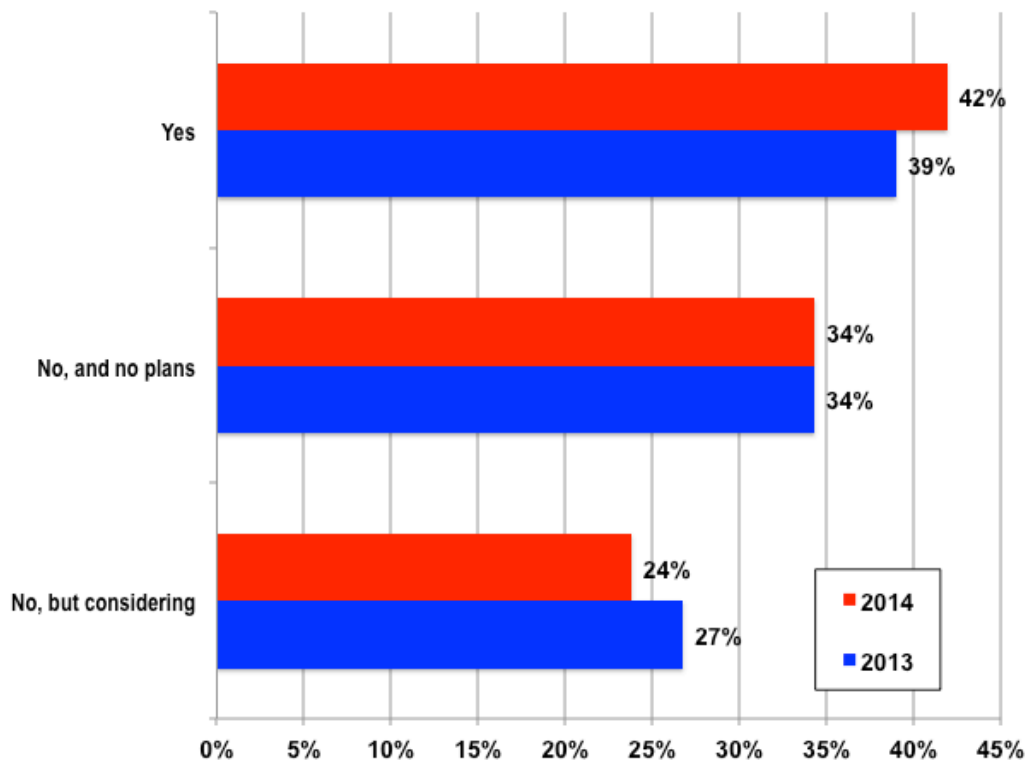*% of public libraries by population served and geographic region, 2014*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
License with set # of circs model	41%	69%	87%	80%	65%	70%	70%	69%
Purchase with perpetual access	40%	47%	64%	64%	61%	55%	66%	36%
Patron-driven acquisition	26%	31%	33%	44%	36%	40%	20%	27%
Concurrent use/access	14%	30%	39%	64%	28%	27%	45%	32%
Subscription	23%	31%	30%	52%	33%	23%	32%	31%
Upfront purchase with maintenance fee	28%	24%	28%	44%	28%	30%	28%	27%
Bundled with other content	9%	9%	13%	4%	11%	9%	9%	10%
Purchase with perpetual access through self-hosting	8%	5%	7%	12%	7%	5%	6%	8%
Pay-per-use	5%	5%	5%	16%	5%	7%	7%	7%
Single Purchasing term used	40%	22%	18%	8%	22%	18%	23%	30%
Other	12%	7%	7%	4%	8%	7%	6%	7%

The figure below tracks five top purchasing terms over four years of surveys. "License with set number of circs" was added in 2011 when HarperCollins introduced the 26-circ model and has increased substantially since. "Patron-driven acquisition" has also nearly tripled from 10% to more than 30% of libraries. "Subscription" and "purchase with perpetual access" are both down in 2014.

Figure 57. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries, 2010–2014
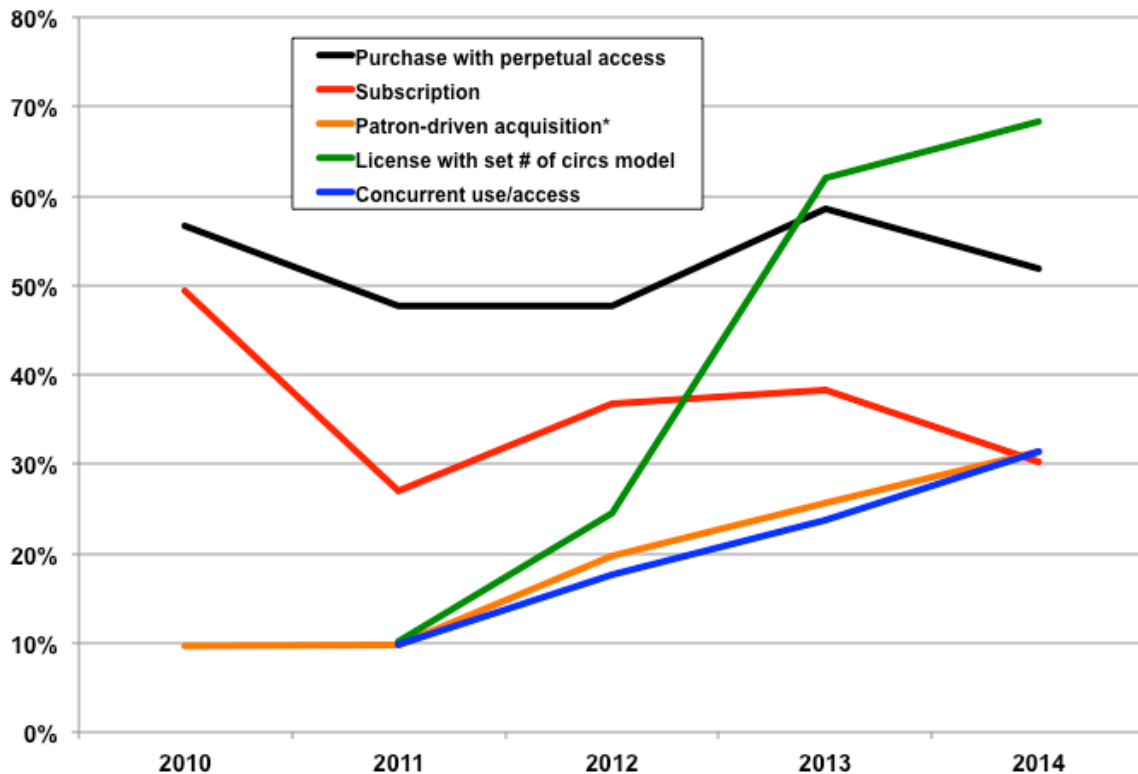
Referred to as "user-driven acquisition" prior to 2013.

Patron-Driven Acquisition

In 2012, the last year we conducted this survey among academic libraries, we were introduced to the concept of patron- (or user-) driven acquisition, which had become a popular way for libraries to meet the specific needs of users. With patron-driven acquisition, a title is purchased as it's requested, which saves a lot of second-guessing and misallocation of resources. As we saw in the purchasing terms question, it has grown substantially over the past three years among public libraries. Last year, we added a question specific to patron-driven acquisition, which we reprised this year. This year, 42% use patron-driven acquisition for ebooks—up a bit from last year. Another quarter (24%) is considering it. (The numbers here don't necessarily correspond to the numbers in the purchasing terms question. The earlier question asked about the terms that libraries *typically* purchase. Here we're asking if libraries use patron-driven acquisition at all.)

Figure 58. Does your library use patron-driven acquisition for ebooks?
% of public libraries, 2013/2014

Last year, we noted that use of patron-driven acquisition declined as library size increased. This year, we are seeing the reverse. As ebook demand increases in larger libraries, patron-driven acquisition becomes an economic and efficient way of meeting that demand.
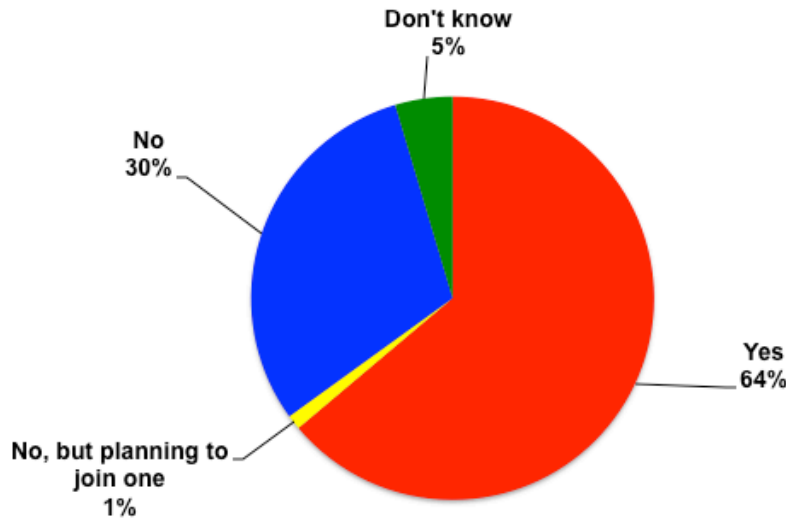
Table 36. Does your library use patron-driven acquisition for ebooks?
% of public libraries by population served and geographic region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Yes	32%	47%	43%	46%	53%	45%	28%	35%
No, but considering	35%	19%	20%	25%	16%	27%	33%	25%
No, and no plans	33%	33%	38%	29%	31%	28%	39%	39%
2013								
Yes	44%	43%	33%	38%	38%	62%	39%	27%
No, but considering	26%	21%	29%	38%	36%	7%	26%	28%
No, and no plans	29%	36%	38%	25%	26%	31%	35%	45%

Consortium Membership

Over the past four years, consortium membership has remained generally consistent. This year, 64% said they currently were part of one, and 30% said they were not. Only 1% plan to join one. These numbers are virtually unchanged from last year.

Figure 59. Is your library part of a consortium license program for its ebook collection?
*% of public libraries, 2014*

As always, consortium membership decreases quite dramatically as libraries get larger: 83% of small libraries are members of a consortium, while only 13% of very large libraries are.

Table 37. Is your library part of a consortium license program for its ebook collection?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	83%	81%	36%	13%	78%	82%	42%	50%
No, but planning to join one	1%	0%	2%	3%	1%	0%	2%	2%
No	14%	15%	55%	71%	21%	15%	44%	42%
Don't know	2%	4%	6%	13%	0%	4%	12%	6%

The figure below shows that consortium membership has remained generally constant for almost all size libraries, although the largest libraries declined precipitously this year. Statistical anomaly? Possibly, but historically, consortium membership has tended to be a more appealing prospect—and more of an economic necessity—for smaller libraries.

Figure 60. Yes, library is part of a consortium license program for its ebook collection
% of public libraries by population served, 2010–2014
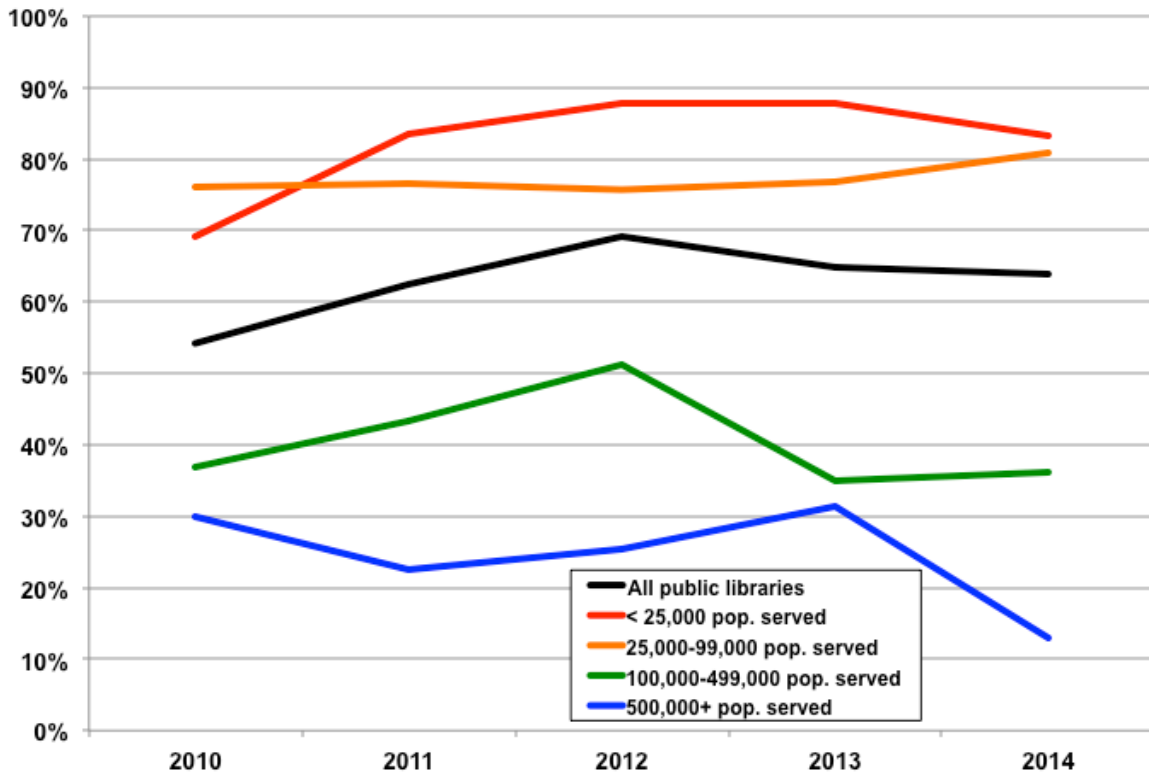
Vendors Used and Preferred

Another perennial question we ask in this survey (although we did omit it last year) is about vendors. If you read the verbatim comments presented at the end of each chapter of this report—and have read them going back to our first survey— you know that libraries have often had an adversarial relationship with their ebook vendors, typically involving purchasing terms and the perceived high cost of ebooks, as well as access restrictions placed upon ebooks.

There has been a lot of "churn" in the ebook vendor space, which makes historical comparisons difficult, so we present these data as a contemporary snapshot of the vendors that public libraries use and prefer.

In terms of vendors used, OverDrive (cited by more than nine out of ten libraries) has come to dominate the ebook space for libraries. As you can tell from the verbatim comments, not everyone is happy with OverDrive, but it remains popular. TumbleBooks is a distant second at 40%. The free online Project Gutenberg was cited by 31%. (OverDrive allows access to Project Gutenberg titles.)

Figure 61. From which vendor(s) does your library acquire ebooks?
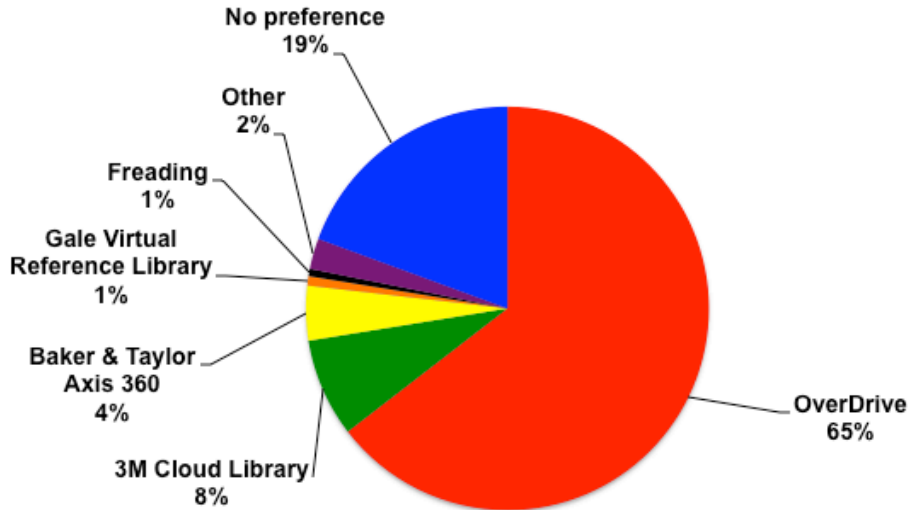*% of public libraries, 2014*
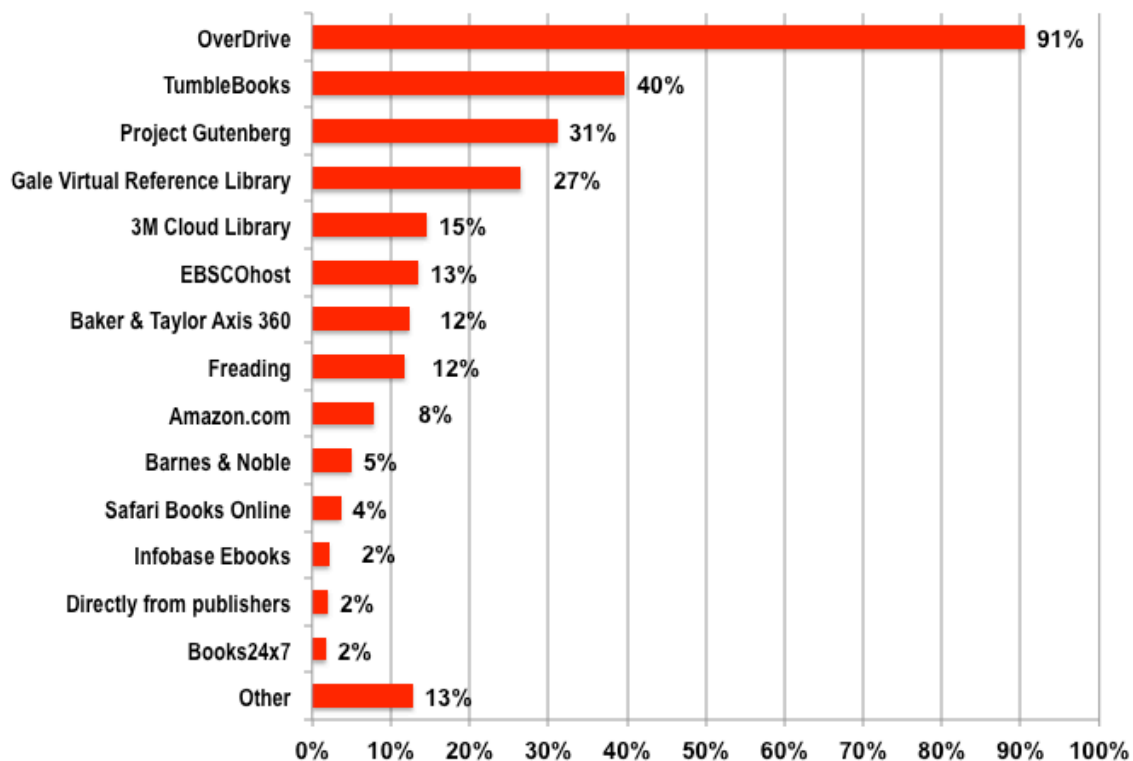
Larger libraries have the ability to frequent a larger number of vendors—72% avail themselves of TumbleBooks and 76% use the Gale Virtual Reference Library, for example.

Table 38 From which vendor(s) does your library acquire ebooks?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
OverDrive	88%	92%	92%	92%	95%	96%	84%	86%
TumbleBooks	24%	38%	48%	72%	43%	35%	35%	42%
Project Gutenberg	26%	23%	43%	48%	28%	31%	46%	28%
Gale Virtual Reference Library	6%	17%	43%	76%	24%	15%	46%	28%
3M Cloud Library	9%	12%	21%	20%	19%	8%	29%	9%
EBSCOhost	6%	17%	11%	36%	12%	9%	13%	17%
Baker & Taylor Axis 360	13%	12%	10%	28%	12%	7%	22%	12%
Freading	12%	10%	13%	12%	7%	9%	13%	17%
Amazon.com	15%	6%	5%	0%	13%	14%	5%	1%
Barnes & Noble	9%	4%	3%	0%	3%	13%	10%	0%
Safari Books Online	0%	5%	2%	16%	2%	4%	5%	4%
Infobase Ebooks	0%	1%	7%	0%	2%	0%	9%	1%
Directly from publishers	0%	3%	2%	12%	0%	0%	8%	3%
Books24x7	0%	3%	0%	16%	1%	0%	9%	1%
Ingram/MyiLibrary/Coutt's	0%	1%	0%	0%	0%	0%	2%	0%
Ebrary	0%	0%	0%	0%	0%	0%	0%	0%
Other	10%	14%	11%	20%	11%	7%	26%	12%

In terms of preferred vendor, OverDrive is far and away the top choice among libraries, cited by 65%—no one else is even in double digits. Still, one-fifth (19%) of respondents had "no preference."

Figure 62. Which is your preferred ebook vendor?
% of public libraries, 2014

Table 39. Which is your preferred ebook vendor?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
OverDrive	50%	68%	67%	75%	64%	70%	56%	66%
3M Cloud Library	7%	9%	9%	4%	15%	2%	10%	4%
Baker & Taylor Axis 360	2%	4%	7%	4%	3%	2%	0%	9%
Gale Virtual Reference Library	0%	0%	2%	0%	0%	0%	0%	2%
Freading	0%	0%	0%	4%	0%	0%	0%	2%
Project Gutenberg	2%	0%	0%	0%	0%	2%	0%	0%
Ingram/MyiLibrary/Coutt's	0%	2%	0%	0%	0%	0%	3%	0%
Safari Books Online	0%	2%	0%	0%	0%	2%	0%	0%
Other	2%	2%	0%	0%	0%	0%	0%	3%
No preference	36%	14%	15%	13%	18%	21%	32%	14%

In Summary

Ebooks are gradually usurping a larger percentage of libraries' overall materials budgets. In 2010, ebooks accounted for less than 2% of the budget—now the average is 7% or more. And libraries predict that by 2019, ebooks will account for up to 14% of their materials budgets. Interestingly, back in 2010, we had asked libraries to predict what percentage of the budget ebooks would account for in five years—that is, 2015—and the average was 7%. That ebooks account for 7% of the budget now shows that librarians had only slightly underestimated the growth of ebooks.

In their most recent fiscal year, public libraries bought on average 565 ebook volumes and spent $13,000 on ebooks. That loosely equates to a median cost per ebook of $23.

Two-thirds of libraries have had to reallocate funds from other areas to pay for ebooks—most of that reallocation came from reference and print books. In fact, one-fifth have cut down on their print book acquisition—mostly nonfiction categories like test prep, travel guides, and legal guides.

Libraries recognize that even though ebooks are hot today and will continue to be tomorrow, a substantial portion of their user base still prefers print books. As a result, the two formats will exist side by side for the foreseeable future—and probably forever. Certain types of print will likely decline—nonfiction and reference, for example, especially topics and subjects that can be easily found online. Wikipedia has its issues, but even colleges and universities accept Wikipedia citations as source material, so traditional reference materials may be readily sacrificed for other types of acquisitions, like ebooks.

As for ebook vendors, OverDrive is used by the vast majority of public libraries (91%), followed by TumbleBooks (40%) and Project Gutenberg (31%). The most sought after ebook vendor attributes include selection, compatibility with as many devices as possible, ease of use, and cost.

We have seen a shift in the ebook purchasing/licensing terms that libraries have been using. "License with a set number of circulations" has taken over as the dominant arrangement (68%) followed by "purchase with perpetual access," "patron-driven acquisition" and "concurrent use/access."

Consortium membership has neither risen nor fallen from just under two-thirds of public libraries, except among the largest. Consortia are a real boon to smaller, more financially strapped libraries.

In Their Own Words

We asked survey respondents why they selected their choice of preferred vendor. Here is a lightly edited sampling of their responses. Some top themes: selection, compatibility with as many devices as possible, ease of use, and cost. Another factor is how long libraries have been working with a particular vendor.

- *"3M is a lot easier to use, but it does not have audiobooks available."*

- *"Because we are able to include their content on our catalog: Polaris. OverDrive does not have that capability."*

- *"Ease of use and full integration with our PAC."*

- *"Easier to use, many more titles available due to consortium purchasing."*

- *"Easiest for users to get started with it. It is also easier to use and select for. OverDrive is the only source that allows our (many) Kindle users access—were that to change we might make some changes."*

- *"We like spreading our dollars among vendors to give OverDrive the nudge to develop better support for library staff."*

- *"Purchasing and cataloging process is easiest to integrate into collection development workflow. Superior vendor support for simultaneous print/digital acquisitions."*

- *"Stable model for patron access, consistency in acquisitions platform, robust platform, library friendly, vendor relationships with publishers = library advocacy."*

- *"We get highest circ from TumbleBooks, but chose Axis 360 because we own content and it has all ages unlike TumbleBooks."*

- *"I like the Freading model much better than OverDrive. OverDrive titles are not simultaneous use, even when we have to pay for a specified number of uses, they still occur one at a time. OverDrive also has a customer request module, but will not provide us with our customer information with the request. There are many features that we like and customers like about OverDrive, but limited ability to see our customer info and no ability to customize the landing page that our customers have to go to to borrow books make it very frustrating to deal with them. If someone else offered Kindle format, we would absolutely be talking to them about switching."*

- *"At present OverDrive continues to offer the best popular author/publisher selections. They offer a robust browsing experience. Any other vendor we have looked at offers third rate content or would require us to invest in a second annual subscription to pay for the system to offer ebooks. A pay per circ model would be ideal for us, making use of ridiculously easy downloading directly from any handheld. Still waiting for this one..."*

- *"Best platform for delivery of ebooks, eaudiobooks, and emovies. Not very good for emusic but it is part of the integrated package."*

- *"Collection content is far superior and Kindle compatibility is key for many of our patrons."*

- *"Even with the difficult download process, OverDrive has the widest device support, the largest collection, and is the vendor our customers are most familiar with."*

- *"It's our main ebook vendor, though we subscribe to TumbleBooks for picture book access."*

- *"Just beginning other relationships, have been OverDrive customer for many years (though we were a NetLibrary/Recorded Books customer before that for some ebooks, and downloadable audio)."*

- *"Largest selection of titles and supports largest number of devices."*

- *"Our OverDrive subscription includes Project Gutenberg."*

- *"OverDrive content is better, still not great, but better than Freading's."*

- *"OverDrive has more mainstream content available; EBSCO is more focused on education/academia."*

- *"OverDrive selection is improving. Most of our patrons want popular and current titles. We looked into using another along with OverDrive (B&T, 3M) but found that the platform fee for several platforms was prohibitive. The prices and processes are so similar between other vendors and OverDrive that it was easier to stay with what we already have established."*

- *"OverDrive is constantly working on publisher agreements and enhancements to offer more titles and make access easier."*

- *"The process for borrowing and downloading ebooks is much easier with OverDrive than with Freading. Also, we are able to provide more popular titles with OverDrive, which is what most of our patrons who read and checkout our ebooks want."*

- *"We have used OverDrive for 6 years and they are always changing to meet new technologies and helpful—professional service. Wish they had more current content from publishers. We have access to content for all the vendors on the list above."*

- *"Different vendors for different needs. Overdrive is high on list because Kindles are usable. So far 3M hasn't been able to get Amazon to allow anything but Kindle Fire. Books 24x7 is computer/technical/personal development so I don't have to buy from others. TumbleBooks is mostly for children but I also buy from OverDrive."*

- *"We belong to a consortium for OverDrive so the pool of titles is quite large, although OverDrive is not as user-friendly as 3M, which integrates with our ILS (YES!). However, we don't own very many 3M titles—expensive and limited. OneClick only get subscription titles—definitely the least favorite."*

5. EBOOKS AND EREADERS

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

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

- Library computer

- Personal laptop/Computer/Netbook

- Other portable device

- Dedicated ebook reader

At the time, "dedicated ebook reader" essentially referred to the Nook or the Sony Reader, both black-and-white devices at the time. Kindles were not yet compatible for library use, and the first-generation iPad had just been released.

What a difference four years makes.

The number of tablets and ereaders has expanded greatly, and there are color and monochrome devices at all price ranges and levels of capability. At the same time, smartphones have become larger and tablets have become smaller—the portmanteau word "phablet" has been coined to refer to those devices that exist in the space where phones and tablets overlap.

There is also greater interest in the cloud, or having content of all kinds stored virtually and then streamed to a device. This precludes the need to download content like an ebook directly to a device. Of course, this means that to read such an ebook, you need to have a constant and reliable Internet connection.

Let's see how things have changed since 2010.

The Cloud from Both Sides

A new question we added in this survey asked what percentage of a library's ebooks were stored in and accessed from the cloud, and what percentage were device-downloadable. The majority of libraries' ebook collections—86% of ebooks—are still device-downloadable, with 14% stored in and accessed from the cloud.

Figure 63. Thinking about all the ebooks you have available, what is the percentage breakdown of patron's access methods?
*% of each method, all public libraries, 2014*
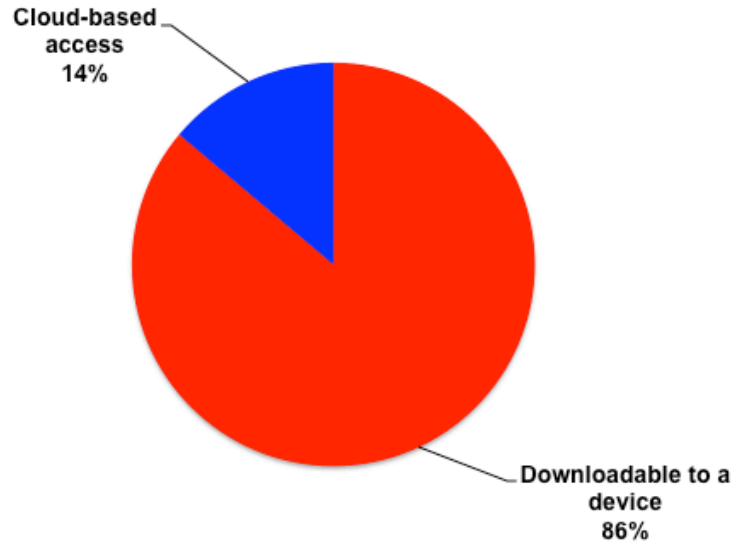
The cloud vs. device divide does not vary appreciably by size of library.

Table 40. Thinking about all the ebooks you have available, what is the percentage breakdown of patron's access methods?
% of each method by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Downloadable to a device	90%	85%	86%	83%	86%	89%	85%	86%
Cloud-based access	12%	15%	14%	17%	14%	13%	15%	14%

Ereaders Used

The tablets are taking over—although, admittedly, the distinction between a tablet and a dedicated ebook reader may be blurring. Last year, 86% of public libraries said that their patrons use some kind of dedicated ebook reader like a Kindle or a Nook—this has dropped to 78% this year. Meanwhile, 82% last year said patrons use a tablet like an iPad—this has risen to 84%. Smartphone or other mobile devices are slowly declining. The library computer is down to 2%.

Figure 64. What device(s) do your library users most often use to read circulating/trade ebooks?
% of public libraries, 2014
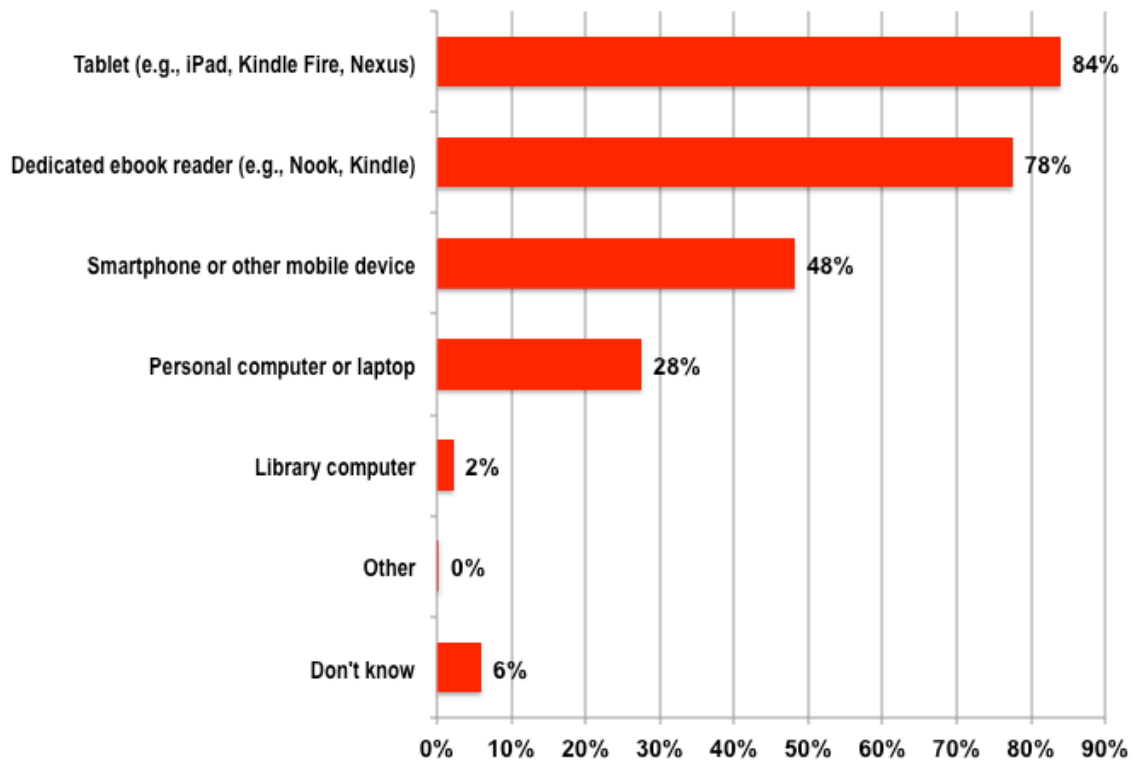
The library computer rises to 13% among the largest libraries—libraries which serve large metropolitan areas and, therefore, a greater proportion of economically disadvantaged patrons who may not be able to acquire their own ereading devices.

Table 41. What device(s) do your library users most often use to read circulating/trade ebooks?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	*25,000-99,000*	*100,000-499,000*	*500,000+*	*Midwest*	*North-east*	*West*	*South*
Tablet (e.g., iPad, Kindle Fire, Nexus)	80%	83%	89%	87%	82%	82%	94%	82%
Dedicated ebook reader (e.g., Nook, Kindle)	75%	79%	80%	74%	72%	76%	83%	81%
Smartphone or other mobile device	40%	50%	52%	61%	42%	49%	55%	51%
Personal computer or laptop	23%	28%	28%	42%	27%	19%	34%	30%
Library computer	2%	1%	1%	13%	6%	1%	0%	1%
Other	0%	0%	1%	0%	0%	0%	0%	1%
Don't know	8%	3%	5%	13%	9%	6%	2%	5%

Personal computers/laptops continue to decline, and dedicated ereaders are down for the second survey in a row. They have now been surpassed by tablets.

Figure 65. What device(s) do your library patrons most often use to read circulating/trade ebooks?
% of public libraries, 2010–2014
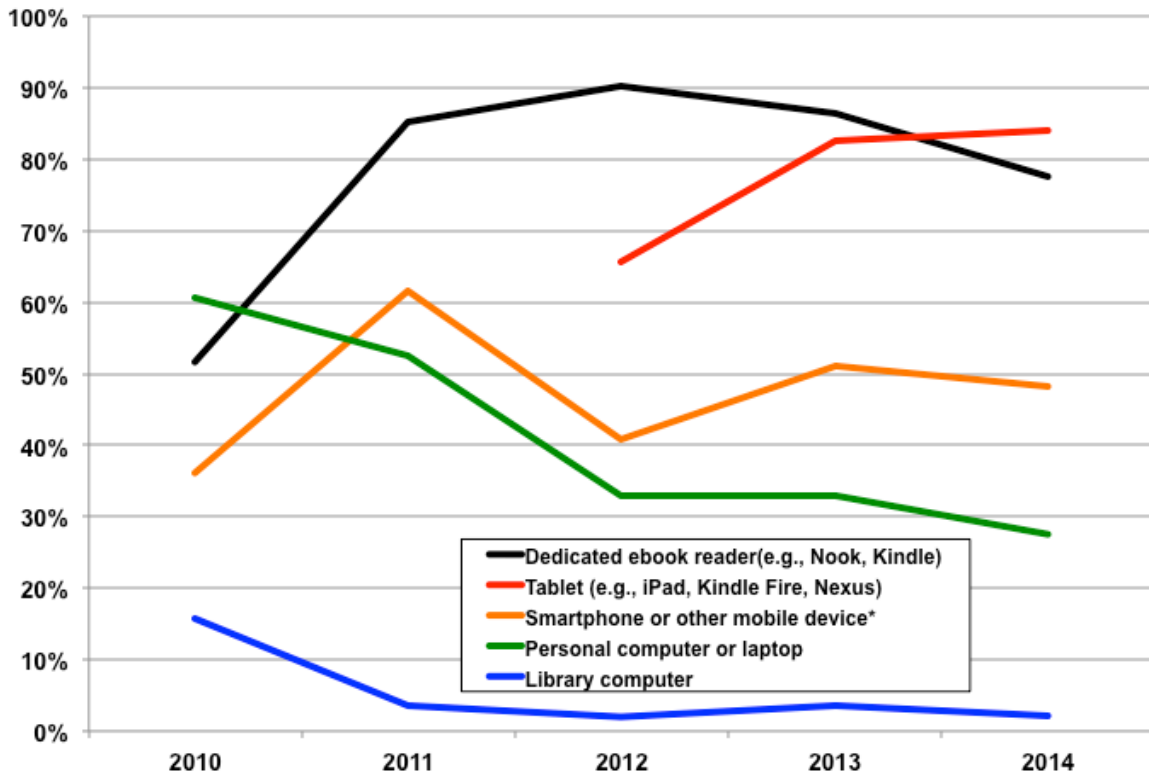
Note: In 2010 and 2011, tablet (like iPad) and smartphone (like iPhone) listed as "other portable device."

Availability of Reading Devices

A perennial question in our survey is whether libraries have ereaders available for patrons to borrow. This year, the number of libraries that do offer ereaders has dropped, from 40% last year to 32% this year. That's not a huge drop, but may reflect the growing penetration of tablets and other mobile devices among library patrons. As more patrons use their own devices, it saves the library from having to deal with the logistics (and expense) of offering and loaning the devices, as well as deal with maintenance, repair, and other challenges.

The percentage of libraries that have no plans to offer ereaders has remained pretty consistent at 40%.

Figure 66. Does your library have ereading devices available for patrons to borrow?
% of public libraries, 2014
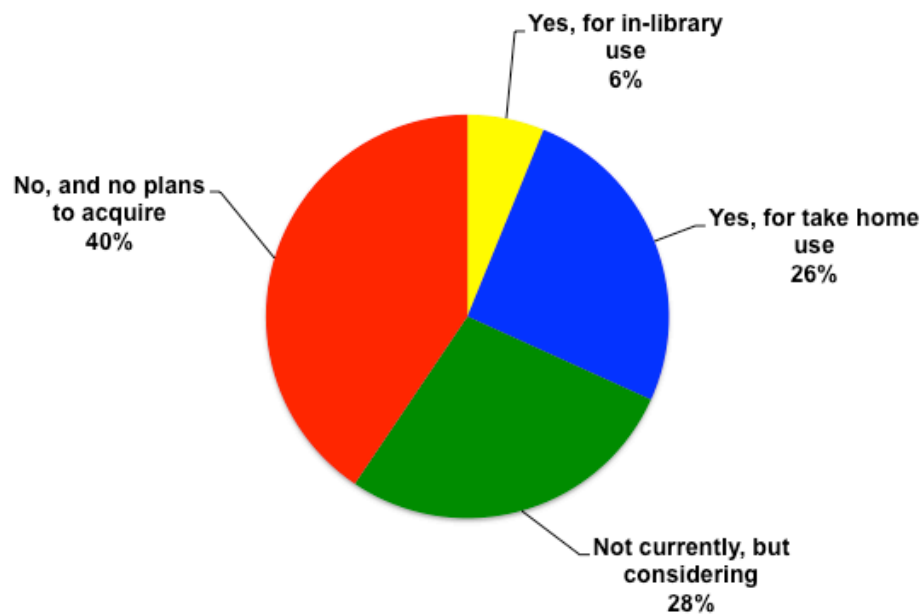
Table 42. Does your library have ereading devices available for patrons to borrow?
% of public libraries by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET YES	33%	38%	23%	13%	33%	42%	33%	19%
Yes, for in-library use	9%	8%	4%	0%	7%	9%	1%	7%
Yes, for take home use	28%	34%	20%	13%	30%	37%	33%	13%
Not currently, but considering	27%	31%	27%	29%	28%	29%	27%	29%
No, and no plans to acquire	40%	32%	51%	58%	40%	29%	40%	52%

Generally, library availability of ereaders peaked last year. As the devices come down in price and thus increase in prevalence among the population, the need for libraries themselves to offer access will continue to decline.

Figure 67. Libraries that circulate ereaders for in-library or home use
% of public libraries by population served, 2010–2014
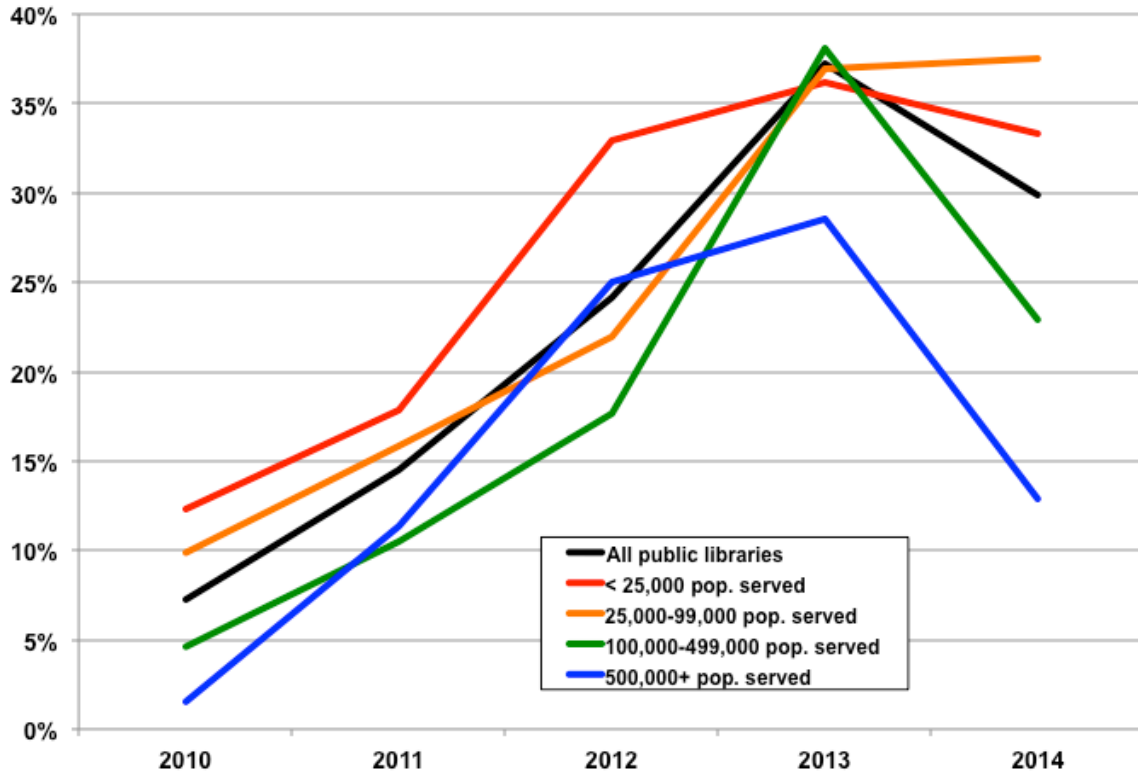
Which Ereaders Do Libraries Circulate

Of the 32% of public libraries that circulate ereaders to patrons, the Kindle and the Nook remain the top two devices circulated, although the Nook is down from last year. The iPad or iPad Mini is circulated by 28%—down from 47% last year.

Figure 68. If yes, which ereading device(s) does your library currently have available?
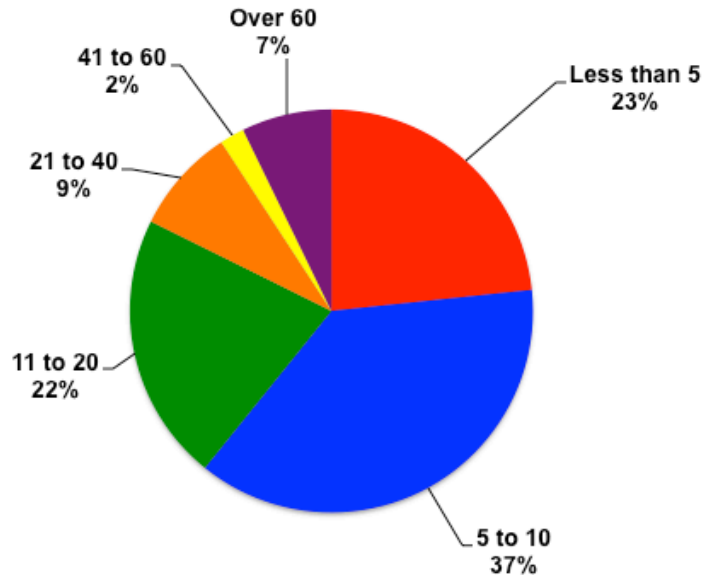*% of public libraries that circulate ereaders, 2014*
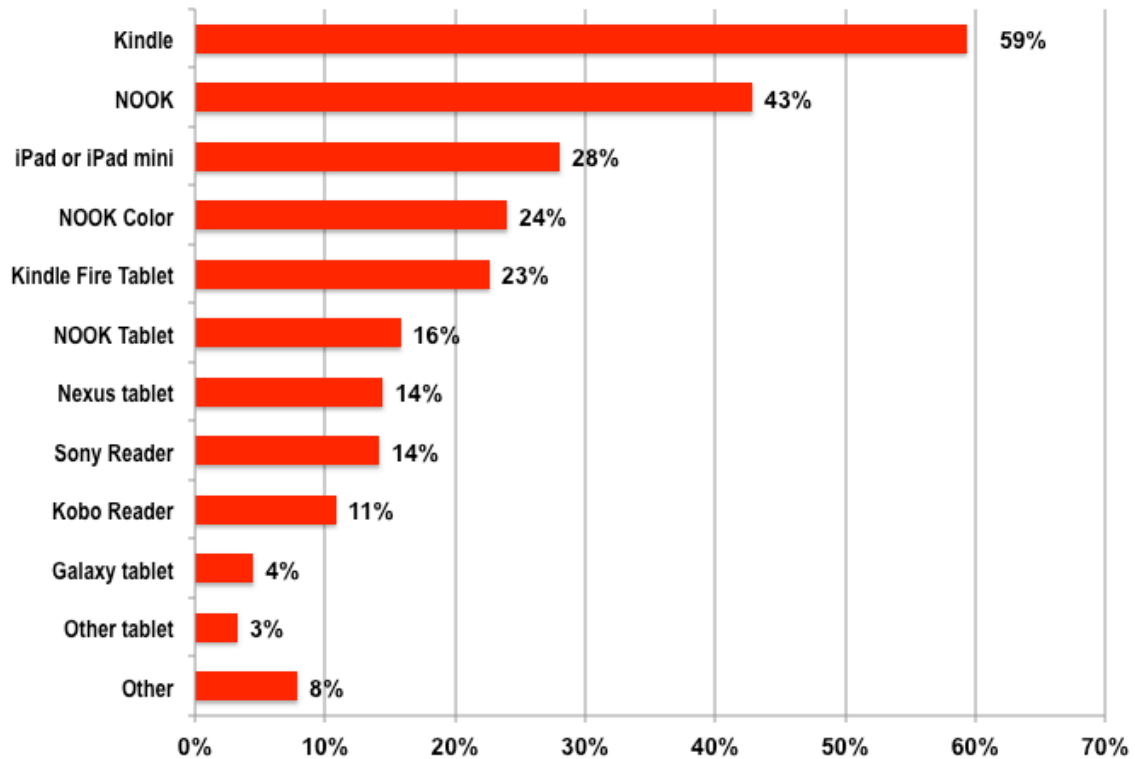
Table 43. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET Dedicated e-readers	88%	82%	68%	75%	85%	85%	75%	70%
Kindle	65%	64%	47%	0%	62%	67%	32%	66%
NET Tablets	53%	67%	47%	25%	66%	53%	28%	69%
NOOK	53%	36%	42%	50%	39%	44%	71%	24%
iPad or iPad mini	30%	31%	21%	0%	32%	24%	10%	41%
NOOK Color	30%	24%	21%	0%	34%	29%	13%	10%
Kindle Fire Tablet	33%	27%	5%	0%	28%	20%	10%	27%
NOOK Tablet	10%	22%	16%	0%	11%	18%	23%	15%
Nexus tablet	10%	20%	11%	25%	19%	11%	5%	18%
Sony Reader	20%	13%	5%	25%	13%	23%	5%	10%
Kobo Reader	20%	9%	0%	0%	8%	14%	20%	4%
Galaxy tablet	8%	4%	0%	0%	2%	0%	5%	14%
Other tablet	3%	2%	5%	0%	3%	0%	5%	6%
Other	5%	9%	5%	25%	9%	0%	10%	15%

Given the rate at which new devices and new classes of mobile devices appear, historical tracking is difficult, but the figure below gives a good sense of the trends in ereader circulation by public libraries.

Figure 69. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, 2010–2014
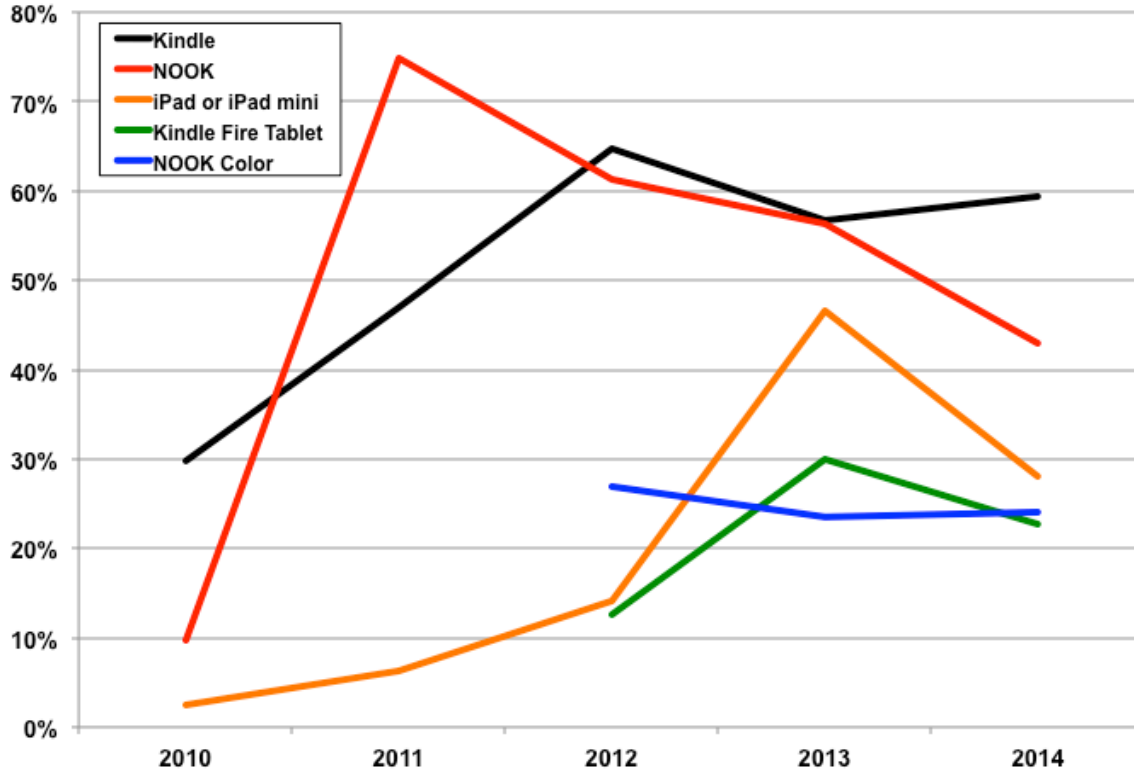
How Many Ereaders?

Of the 32% of libraries that circulate ereaders, they have, on average, 19.4 devices on hand (median 8.0).

Figure 70. If yes, how many ereading devices does your library have available to borrow?
% of public libraries that circulate ereaders, 2014
Mean: 19.4
Median: 8.0

Table 44. If yes, how many ereading devices does your library have available to borrow?
% of public libraries that circulate ereaders, by population served and geographic region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Less than 5	56%	9%	5%	0%	12%	37%	25%	20%
5 to 10	31%	56%	16%	0%	36%	33%	30%	52%
11 to 20	10%	22%	37%	25%	29%	24%	6%	19%
21 to 40	3%	9%	16%	0%	9%	4%	19%	6%
41 to 60	0%	2%	5%	0%	4%	0%	0%	4%
Over 60	0%	2%	21%	75%	10%	2%	20%	0%
Mean	5.4	14.0	36.2	170.0	21.7	9.8	39.8	12.0
Median	4.0	8.0	20.0	160.0	11.0	7.0	8.0	9.0

The number of ereading devices made available to library patrons has mostly remained steady among smaller libraries, even as it has increased among larger libraries.

Figure 71. Median number of ereading devices library has available to borrow
public libraries that circulate ereaders, by population served, 2011–2014
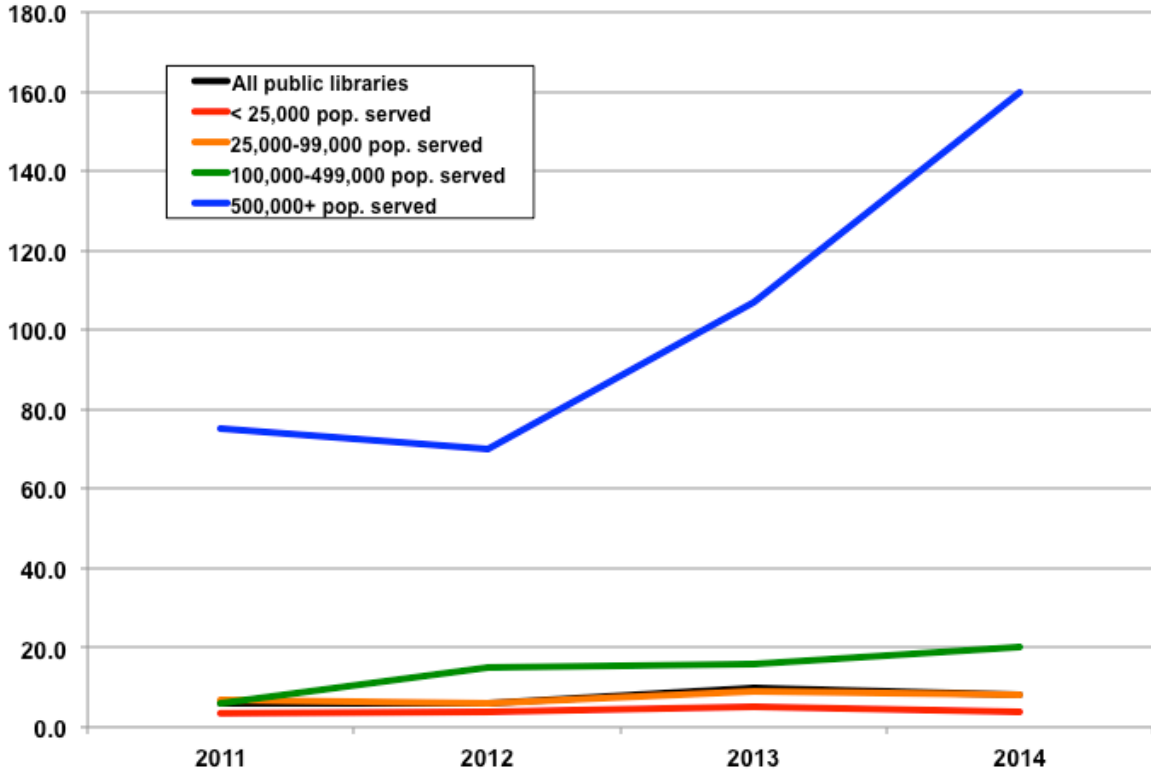
Whom Are the Ereaders For?

Last year, we added a follow-up question asking for whom the ereading devices were intended—adults or kids. Virtually all of our respondents (99%) said their targeted users were adults. Teens and young adults are a secondary target user group, selected by 55% of respondents. Children were the targeted users for only 44% of public libraries, although that was up five percentage points from last year. This year, we determined that 42% of libraries' ereaders were strictly for adults only.

Figure 72. If yes, who are the intended users of your ereading devices? *(multiple responses permitted)*
% of public libraries that circulate ereaders, 2013, 2014
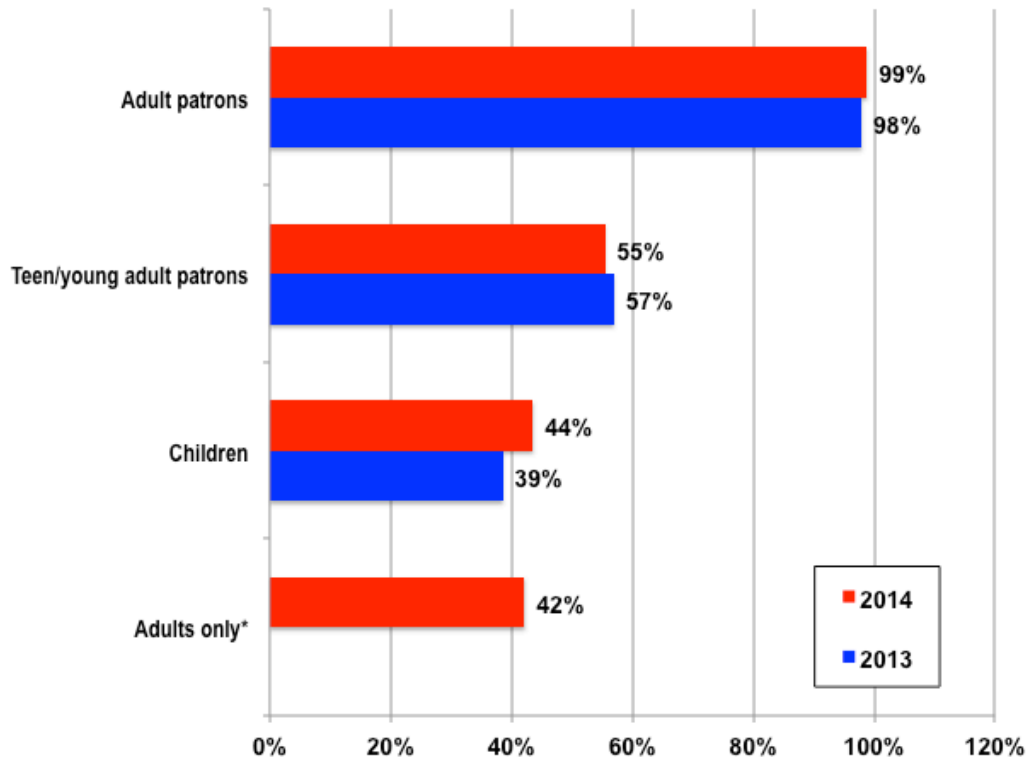
* "Adults only" added in 2014 survey.

Larger libraries are more inclined to offer their ereaders to teens and children than are smaller libraries.

Table 45. If yes, who are the intended users of your ereading devices?
% of public libraries that circulate ereaders, by population served and geographical region, 2013, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Adults only	53%	42%	32%	25%	39%	47%	33%	48%
Adult patrons	100%	98%	100%	100%	100%	100%	100%	94%
Teen/young adult patrons	48%	56%	63%	75%	61%	45%	67%	52%
Children	30%	47%	53%	75%	48%	44%	50%	30%
2013								
Adult patrons	98%	100%	95%	100%	100%	100%	97%	92%
Teen/young adult patrons	63%	56%	55%	50%	64%	33%	76%	54%
Children	44%	38%	30%	40%	44%	24%	39%	48%

Of the 32% of public libraries that circulate ereaders, 54% preload them with ebooks, virtually unchanged from last year, though down ten percentage points from 2012. One in five (20%) allows borrowers to download their own ebooks, while a quarter (25%) allows a "mixture of both."

Figure 73. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
*% of public libraries that circulate ereaders, 2012–2014*
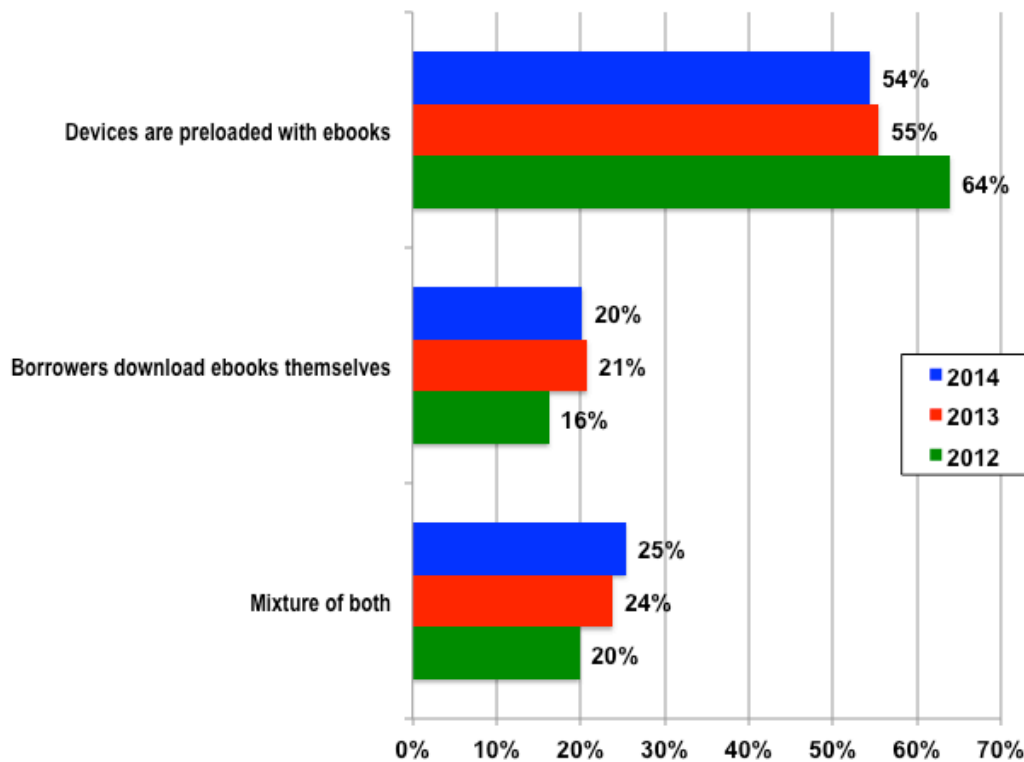
Table 46. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
% of public libraries that circulate ereaders, by population served and geographical region, 2012–2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Devices are preloaded with ebooks	45%	61%	58%	25%	56%	59%	58%	43%
Borrowers download ebooks themselves	15%	23%	16%	50%	20%	13%	15%	35%
Mixture of both	40%	16%	26%	25%	24%	28%	28%	22%
2013								
Devices are preloaded with ebooks	58%	52%	53%	75%	51%	72%	59%	40%
Borrowers download ebooks themselves	11%	23%	32%	25%	26%	6%	16%	40%
Mixture of both	32%	26%	16%	0%	24%	22%	25%	20%
2012								
Devices are preloaded with ebooks	61%	74%	60%	50%	67%	74%	46%	62%
Borrowers download ebooks themselves	15%	13%	20%	50%	16%	11%	21%	13%
Mixture of both	25%	13%	20%	0%	18%	15%	33%	25%

Loaning Policies

This year, we added another follow-up question about whether libraries have different policies for loaning ereaders than they do for other materials. (See the next chart for those specific policies.) As it turns out, 61% of public libraries do have a different policy for their ereaders.
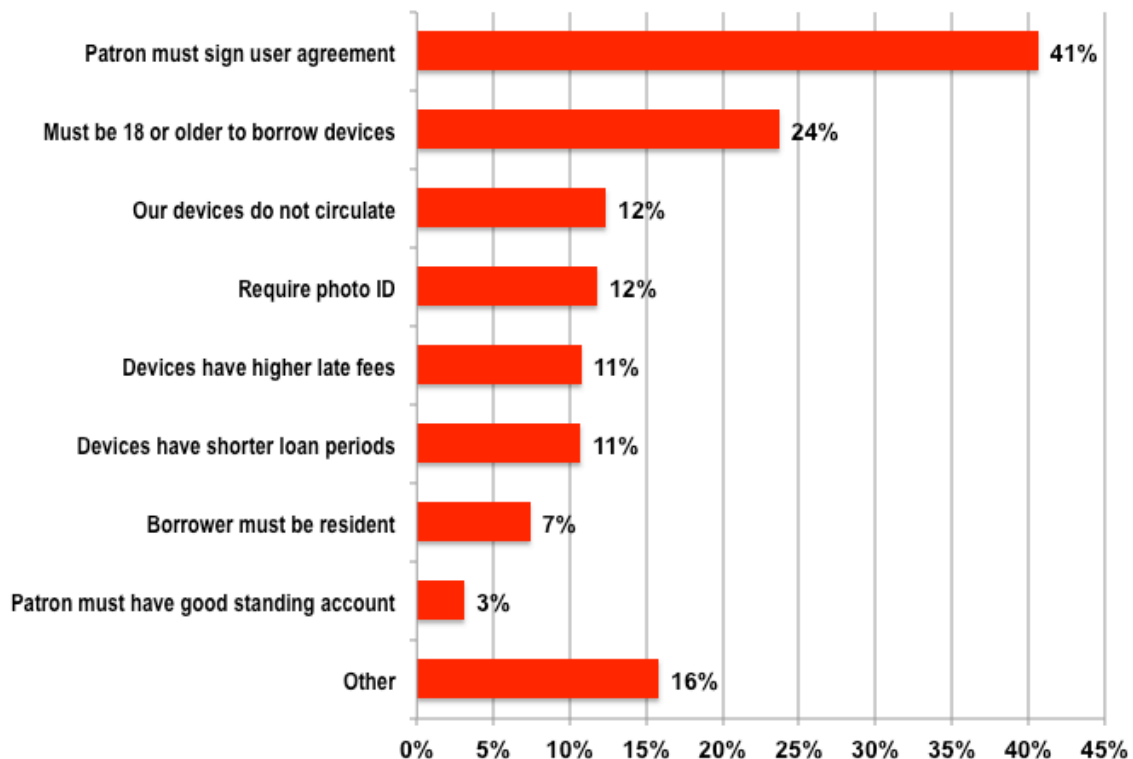
Figure 74. Is your policy for loaning ereading devices different than for other materials?
% of public libraries that circulate ereaders, 2014
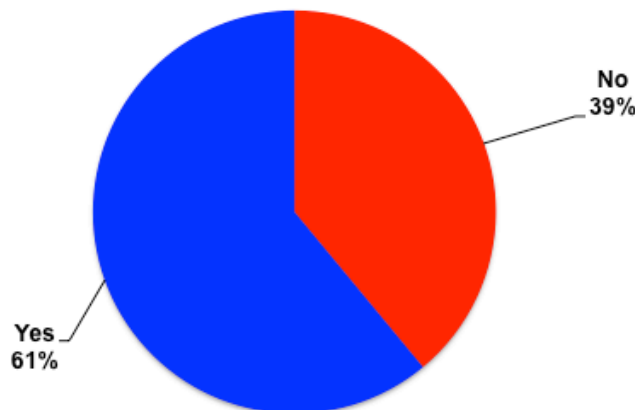
As for what those policies are, 41% require the patron to sign a user agreement. User agreements can spell out things like the loan period which can differ from print books or even ebooks, how to return the readers (i.e., not in the book drop), charges that will be assessed in the event of damage or loss, whether ebooks or other content can be downloaded by the user or if the library needs to preload them. It can also spell out other policies related to the specific ebook service being used (OverDrive, for example).

As for other policies (some of which can be included the user agreement), 24% of libraries require that ereader borrowers be at least 18 years old. Twelve percent say that their ereaders do not circulate—that is, they are for in-library use only.

Figure 75. If your policy for loaning ereading devices different than for other materials, please specify how
% of public libraries that circulate ereaders, 2014

Table 47. If your policy for loaning ereading devices different than for other materials, please specify how
% of public libraries that circulate ereaders, by population served and geographical region, 2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No	28%	36%	61%	50%	52%	34%	48%	16%
Yes	73%	64%	39%	50%	48%	66%	52%	84%
If Yes, please specify how:								
Patron must sign user agreement	43%	41%	43%	50%	30%	39%	64%	41%
Must be 18 or older to borrow devices	25%	26%	0%	100%	42%	16%	44%	3%
Our devices do not circulate	18%	7%	14%	0%	6%	14%	0%	24%
Require photo ID	18%	11%	0%	0%	16%	25%	0%	0%
Devices have higher late fees	7%	15%	14%	0%	5%	23%	18%	0%
Devices have shorter loan periods	14%	7%	14%	0%	10%	12%	30%	0%
Borrower must be resident	0%	15%	0%	0%	7%	11%	14%	0%
Patron must have good standing account	7%	0%	0%	0%	0%	0%	0%	11%
Other	11%	15%	29%	0%	22%	14%	0%	21%

Preloaded Apps

In 2012 and 2013, 28% and 25% of libraries that circulated ereaders, respectively, said they were considering preloading educational apps or enhanced ebooks on their circulating tablets. This year, it seems they have finished considering it, as 61%—up from 27% last year—say that they do indeed load such content on their tablets. The percentage of those who do not is down to 24%. The remaining 15% are still considering it.

Figure 76. If your library has tablets, do you load any of the following educational apps or enhanced ebooks on your library's tablets?
% of public libraries that circulate tablets, 2012–2014
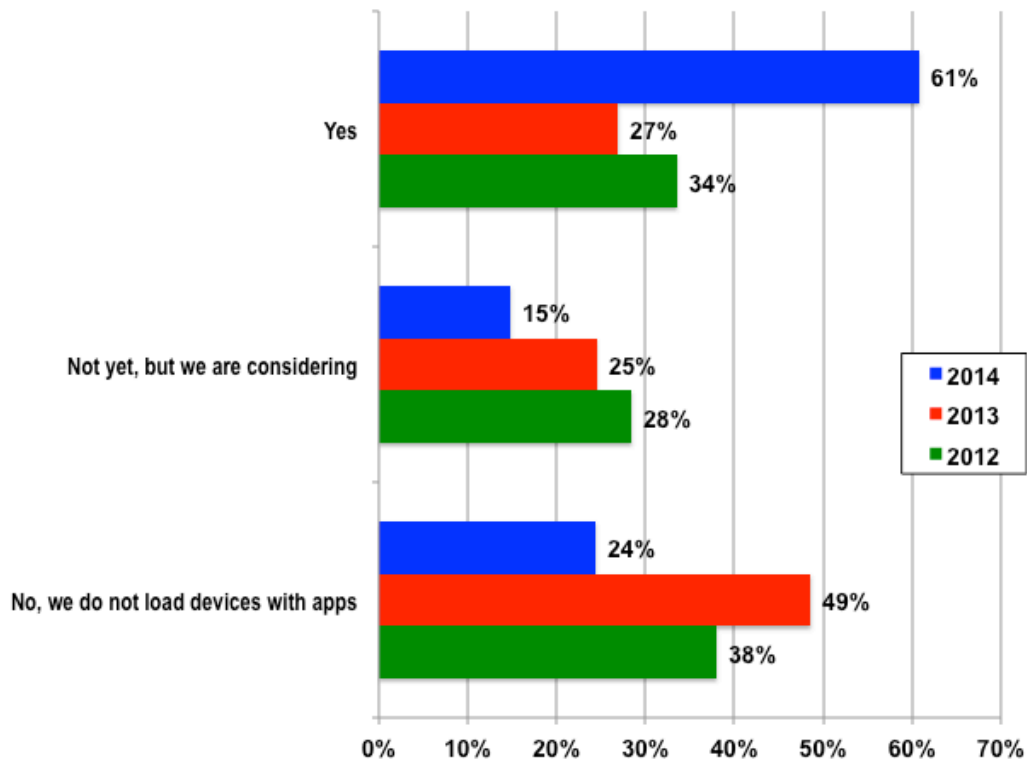
Table 48. If your library has tablets, do you load any of the following educational apps or enhanced ebooks on your library's tablets?
% of public libraries that circulate tablets, by population served and geographical region, 2012–2014

	Population Served				Geographical Region			
	< 25,000	**25,000-99,000**	**100,000-499,000**	**500,000+**	**Midwest**	**North-east**	**West**	**South**
2014								
Yes	71%	45%	83%	0%	42%	80%	100%	73%
Not yet, but we are considering	14%	14%	17%	0%	17%	20%	0%	10%
No, we do not load devices with apps	14%	41%	0%	100%	41%	0%	0%	17%
2013								
Yes	33%	25%	25%	25%	31%	21%	28%	28%
Not yet, but we are considering	28%	20%	25%	25%	19%	40%	44%	6%
No, we do not load devices with apps	39%	55%	50%	50%	51%	40%	29%	66%
2012								
Yes	35%	43%	33%	0%	10%	44%	49%	0%
Not yet, but we are considering	18%	43%	33%	0%	21%	35%	28%	0%
No, we do not load devices with apps	47%	14%	33%	100%	69%	22%	23%	0%

Ereaders in the OPAC

Most libraries (73%, up from 67% last year) say their open public access catalog (OPAC) returns ereading devices in search results. Twenty-two percent of libraries are not even considering this feature, likely because of the complexity of adding it, or their ebook OPAC is hosted by a third party outside the library. Five percent are planning to include this feature in the future.

Figure 77. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, 2013/2014
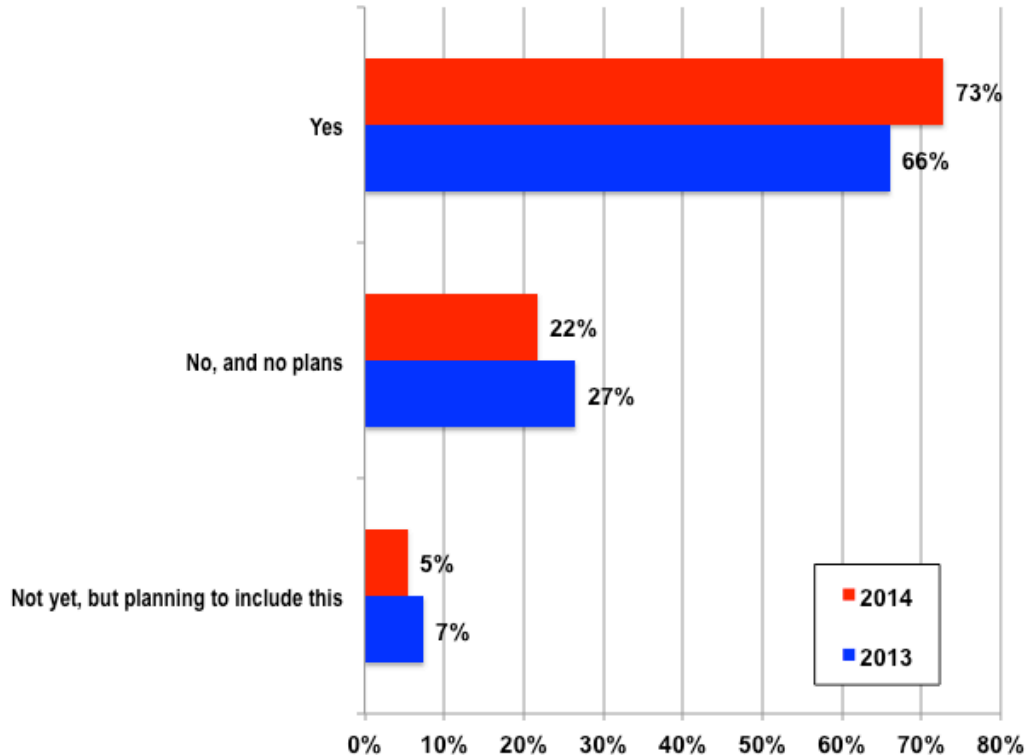
Table 49. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, by population served and geographic region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Yes	63%	80%	74%	75%	73%	79%	82%	55%
Not yet, but planning to include this	10%	2%	5%	0%	2%	6%	5%	10%
No, and no plans	28%	18%	21%	25%	24%	15%	12%	35%
2013								
Yes	76%	76%	38%	80%	73%	76%	73%	35%
Not yet, but planning to include this	5%	6%	14%	0%	7%	8%	10%	5%
No, and no plans	19%	18%	48%	20%	19%	16%	17%	60%

Ereader Purchase Plans

Of those public libraries that do offer and circulate ereaders (32% of all public libraries), 55% say they have no plans to acquire more devices, although 32% (up from 26%) say they do plan to buy more tablets. This is telling: 17% (up from 7%) plan to replace broken tablets. Damage to not-inexpensive electronic devices is a significant problem for libraries. Thirteen percent (down from 19%) plans to buy more dedicated ereaders, reflecting user preference for tablets over dedicated ereaders.

Figure 78. If your library currently has ereading devices, what are your plans for library-owned ereading devices in the next year?
% of public libraries that circulate ereaders, 2013/2014
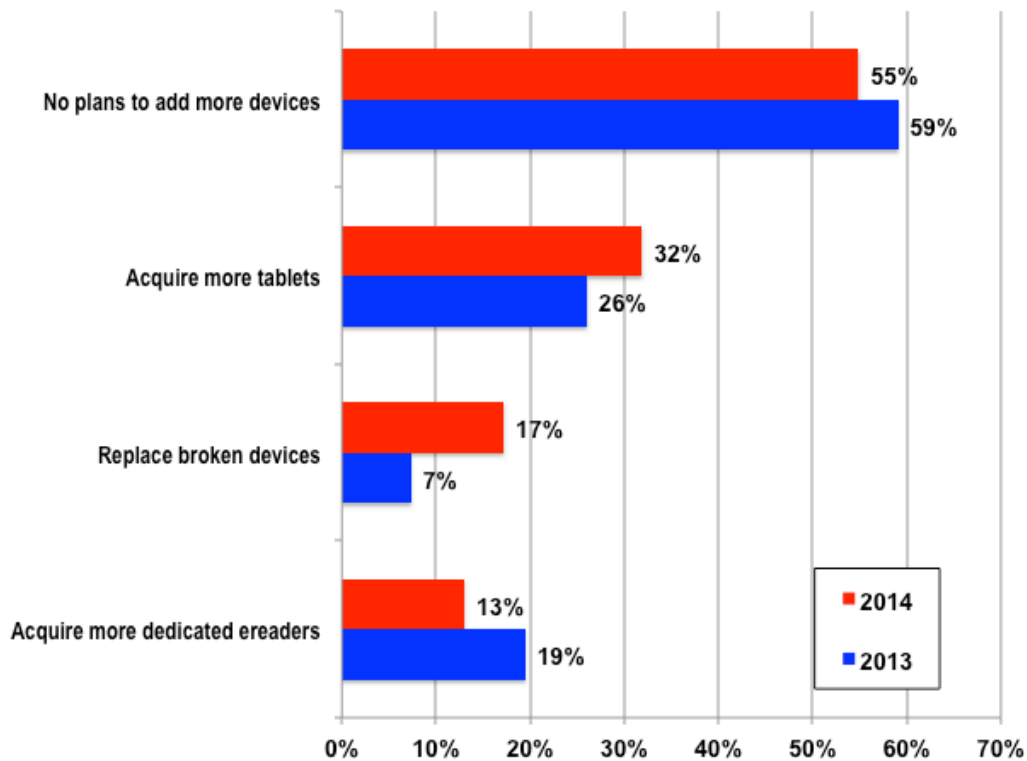
This year, mid-size libraries and libraries in the Midwest appear to have patrons who manhandle borrowed ereaders to a greater extent than patrons elsewhere.

Table 50. If your library currently has ereading devices, what are your plans for library-owned ereading devices in the next year?
% of public libraries that circulate ereaders, by population served and geographical region, 2013/2014

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2014								
Acquire more dedicated ereaders	20%	6%	16%	0%	5%	20%	12%	18%
Acquire more tablets	30%	28%	37%	50%	32%	31%	23%	39%
Replace broken devices	15%	23%	5%	0%	28%	9%	12%	15%
No plans to add more devices	55%	57%	58%	50%	51%	66%	67%	38%
2013								
Acquire more dedicated ereaders	21%	24%	14%	10%	27%	21%	26%	0%
Acquire more tablets	29%	21%	27%	10%	26%	31%	39%	7%
Replace broken devices	7%	6%	5%	30%	4%	8%	16%	5%
No plans to add more devices	60%	58%	64%	60%	61%	54%	30%	88%

In Summary

The tablets have taken over, as they have surpassed the "dedicated ereader" as the dominant reading device among library users. However, as we have been saying, the lines between the two classes of device are blurring. Tablets will likely continue to take over, as they can access a wider variety of content, from ebooks to streaming video, to music, to audiobooks, to the Internet in general. The killer app for the earliest dedicated ereaders like the Kindle was the reflective display which was "as easy to read as paper." Well, these days, people are more used to reading on screens than on paper, and backlit screens have improved so that older eyes can read even smartphone screens with minimal squinting.

Libraries that lend ereading devices appear to have maxxed out at around one-third of libraries overall. As more and more patrons have their own devices, there is less actual need for libraries to supply them—save for libraries that serve impoverished patrons who may lack access to computers and ereading devices. Every Christmas brings a new wave of gift ereaders or tablets, which makes library circulation of ereaders that much less necessary.

Public libraries have not embraced the cloud yet, at least not for its ebook content. The vast majority of libraries' ebooks must be downloaded to a device to be read, not streamed from the cloud.

In Their Own Words

- *"A certain percentage of our population enjoys the option of checking out ebooks, but the wait and the selection through OverDrive can be very frustrating. That drove our decision to circulate a few Kindles and a Nook with preloaded titles."*

- *"Many patrons struggle with the devices, as well as the using them. We cannot know how to use every device that comes out."*

- *"Our users want an easier method for downloading ebooks; they get confused by all the formats and their different devices. Librarians want to have content from all publishers available, concurrent with print, without checkout limits/expirations and at a discount."*

- *"People who buy the devices, particularly elderly people, have extreme difficulty downloading books. They struggle with comprehending how to do it which consequently involves our staff spending a great deal of time not only downloading the book but instructing patrons on how to do it themselves."*

- *"Usage is up each year but less dramatically than when Kindle became the gift to give. Patrons are finding more to read and more easily each year as well."*

- *"We have only kept one vendor due to costs and confusion to the patrons in downloading in a variety of ways. We have a 40–60% use in basic Kindle format so other vendors are not accessible except OverDrive."*

- *"We've found that offering 'drop in' help sessions for getting people started with their ereaders, our circulation rates have consistently gone up from the same time last year."*

GENERAL CONCLUSIONS AND TRENDS

One theme of this year's public library survey is that print is not dead—far from it. In one question, we found that "users prefer printed books" was at an all-time high, and while some budget reallocation has had to take place, print book acquisition has not declined substantially. Even where print titles have been cut back, it has only been in categories and subjects that are already more easily found online. So print and ebooks will continue to exist side by side.

Even Pew says as much. A January 2014, survey conducted by the Pew Internet & American Life Project found that—happily—book reading in general was up across the board, both p- and e-. While 28% of adults read an ebook last year (an all-time high), 69% read a print book, up from 65% a year earlier.[6] Says the report:

> Though e-books are rising in popularity, print remains the foundation of Americans' reading habits. Most people who read e-books also read print books, and just 4% of readers are "e-book only." Audiobook listeners have the most diverse reading habits overall, while fewer print readers consume books in other formats.

The Pew survey also found that 42% of adults now own some kind of tablet computer, a number that increases every holiday season. People also read ebooks on other platforms, as well.

> E-book readers who own tablets or e-readers are very likely to read e-books on those devices—but those who own computers or cellphones sometimes turn to those platforms, too. And as tablet and e-reader ownership levels have risen over the past few years, these devices have become more prominent in the e-reading landscape.

So libraries can expect to continue expanding their ebook collections to meet the continued demand for ebooks from the public—but they shouldn't expect to ditch the print books any time soon.

Patrons have become more comfortable with ebooks and while some gave it a shot and decided to stick with print, most are at the very least—to use a term we coined last year—ambitextrous, being equally comfortable reading p- and e-.

At the same time, a lot of the bugs inherent in first- and second-generation ebook platforms have been worked out, and while, yes, difficulties remain, vendors have done an admirable job working with libraries to troubleshoot problems and improve the experience for library staff as well as patrons.

Trends to Watch

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

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[6] Kathryn Zickuhr and Lee Rainie, "E-Reading Rises as Device Ownership Jumps," Pew Research Internet Project, January 16, 2014, accessed August 28, 2014, http://www.pewinternet.org/2014/01/16/e-reading-rises-as-device-ownership-jumps/.

Hot Trends

- Ebook acceptance is high among the general public.

- Continued health of print books; ebooks are more of a complement/supplement than complete replacement.

- Children growing up in an electronic world are accustomed to reading on devices, but parents still read to small children using print books.

- Prevalence of electronic devices—tablets, ereaders, mobile phones —that can all read ebooks.

- Increased desire (especially by younger folks) to access streamed content à la Amazon Prime—movies, music, TV shows.

Lukewarm Trends

- The general economy is still far from robust, and economic hardship for many limits their ability to acquire ereaders or otherwise engage with ebooks—except via their public libraries.

- Libraries will still be challenged by paying for new initiatives and expanded collections. And it was ever thus.

- Ebook demand had leveled off, but is on the rise again. Demand in libraries may not be of the dramatic variety we saw circa 2012, but will remain at a high level.

- Format wars are leveling off, and it's pretty much down to Kindle vs. the tablets, although you can read Kindle books on tablets—especially Kindle tablets.

- Ease of use challenges will continue to wane.

- Two words: the cloud.

- A trend that will surely heat up in the years to come: libraries needing to provide streaming access to all sorts of content, in addition to books.

- Competition from ebook lending services like KindleUnlimited and Oyster.com.

Cold Trends

- Libraries debating whether to add ebooks. This is an old discussion, as 95% of public libraries now offer ebooks.

APPENDIX: PUBLIC LIBRARIES METHODOLOGY AND QUESTIONNAIRE

The Survey Methodology

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. The present report is one-half of an overall study that included school libraries in addition to public libraries.

LJ's public library ebook survey was fielded from April 4, 2014 to July 2, 2014. A survey invite was sent directly to all *Library Journal* and *School Library Journal* newsletter subscribers and the survey link was advertised in *Library Journal* newsletters. A drawing for an Apple iPad mini was offered as incentive to reply.

The survey closed with 538 public libraries from across the United States responding. The survey was developed, programmed, hosted and tabulated in-house. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. public libraries only. Numbers shown in total were weighted on population served to better represent the PLDS distribution of libraries nationwide.

Previous data used for comparison is based on 553 U.S. public libraries in 2013, 820 U.S. public libraries in 2012, 1,053 U.S. public libraries in 2011, and 781 U.S. public libraries in 2010.

Public Library Ebook Survey

1. How long has your library offered access to ebooks?
☐ We do not offer ebooks [if no ebooks, skip to Q41]
☐ Less than 1 year
☐ 1 to 2 years
☐ 3 to 4 years
☐ 5 years or more

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

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

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

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

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

7. Approximately, what was your total ebook circulation/usage in 2013 (or your last complete fiscal year)?
Total Circulation/usage _____

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

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

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

☐ Bestsellers
☐ Children's
☐ Christian fiction
☐ Classics
☐ Erotica
☐ Fantasy
☐ General adult fiction
☐ Historical fiction
☐ Horror
☐ Literary fiction

☐ Mystery/Suspense
☐ Romance
☐ Science Fiction
☐ Street Lit
☐ Thriller
☐ Women's fiction
☐ Young adult
☐ Other (Specify)_____
☐ No fiction ebooks

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

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

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

12. Approximately what percent of the ebooks you have available are fiction titles versus nonfiction titles? How does this compare to your fiction/nonfiction breakdown for print books?

Ebooks
_____% fiction
_____% nonfiction

Print books
_____% fiction
_____% nonfiction

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

Adult ebooks _____%
Children's ebooks _____%
Young Adult ebooks _____%

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

15. To the best of your knowledge, what device(s) do patrons use most often to read ebooks? Check all that apply.
☐ Library computer
☐ Personal computer or laptop
☐ Dedicated ebook reader (e.g., Nook, Kindle)
☐ Tablet (e.g., iPad, Kindle Fire, Nexus)
☐ Smartphone or other mobile device
☐ Other (specify)_____
☐ Don't know

16. Does your library have ereading devices available for patrons to borrow?
☐ Yes, for in-library use
☐ Yes, for take home use
☐ Not currently, but considering [skip to Q25]
☐ No and no plans to acquire [skip to Q25]

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

18. [If Yes] Which ereading device(s) does your library currently have available? Check all that apply.

☐ Kindle	☐ NOOK tablet
☐ Kindle Fire tablet	☐ iPad or iPad mini
☐ Kobo Reader	☐ Galaxy tablet
☐ Sony Reader	☐ Nexus tablet
☐ NOOK	☐ Other tablet
☐ NOOK Color	☐ Other (specify) _____

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

20. [If Tablet in Q18] Do you load educational apps or enhanced ebooks on your library's tablets?
☐ Yes
☐ Not yet, but we are considering
☐ No, we do not load devices with apps

21. [If Yes] Who are the intended users for your library's devices? Check all that apply.
☐ Adult patrons
☐ Teen patrons
☐ Children

22. [If Yes] Is your policy for loaning ereading devices different than for other materials?
☐ Yes, please specify:

_____
☐ No

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

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

25. What hinders the public from reading your library's ebook content? Check all that apply.
☐ Limited titles available   ☐ Not listed in standard library OPAC
☐ Difficult to find/discover   ☐ In demand titles not available for libraries
☐ Long wait times for ebooks   ☐ Complex downloading process
☐ Digital rights management issues   ☐ Unaware of ebook availability
☐ Limited access to e-reading devices   ☐ Ebook titles not available concurrent with
print release
☐ Users prefer print   ☐ Other
(specify)_____

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

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

27. Are you involved in the recommendation/purchasing process of ebooks for your library?
☐ Yes
☐ No (If No, skip to Q40)

28. How has the addition of ebooks to your collection influenced your print book purchasing?
☐ No influence on print book purchasing
☐ Buy fewer print books now, in what subjects?_____
☐ Buy no print books now
☐ Other, specify:_____

29. From which vendor(s) does your library acquire ebooks? (Check all that apply)
30. Which is your preferred ebook vendor and why?

	Q29. Ebook vendor(s) used	Q30a. One Preferred ebook vendor
3M Cloud Library	☐	☐
Amazon.com	☐	☐
Baker & Taylor Axis 360	☐	☐
Barnes & Noble	☐	☐
Books24x7	☐	☐
Brain Hive	☐	☐
Ebrary	☐	☐
EBSCOhost	☐	☐
eSebco	☐	☐
Freading	☐	☐
Gale Virtual Reference Library	☐	☐
Infobase eBooks	☐	☐
Ingram/MyiLibrary/Coutt's	☐	☐
OverDrive	☐	☐
Project Gutenberg	☐	☐
Safari Books Online	☐	☐
TumbleBooks	☐	☐
Directly from publisher	☐	☐
Other (Specify)_____	☐	☐
No Preference		☐

30b. Briefly, why did you name that company as your preferred vendor?
_____

31. Do you supplement your main publisher ebook selections by offering any of the following? Check all that apply.
☐ Ebooks from small or independent presses
☐ E-originals or self-published ebooks
☐ Backlist ebooks
☐ None of the above

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

☐ Purchase with perpetual access
☐ Purchase with perpetual access through self-hosting (local ownership)
☐ Subscription
☐ Pay-per-use ($1 per circ, for instance) (specify)_____
☐ License with set # of circs model

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

33. Thinking about all the ebooks you have available, what is the percentage breakdown of patron's access methods?

Downloadable to a device   _____%
Cloud-based access   _____%

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

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

	0%	1%-2%	3%-5%	6%-10%	11%-15%	16%-20%	Over 20%
Last year	☐	☐	☐	☐	☐	☐	☐
Currently	☐	☐	☐	☐	☐	☐	☐
In 5 years	☐	☐	☐	☐	☐	☐	☐

36. How many ebook volumes did your library purchase or license (independent of consortially supplied ebooks) in your last complete fiscal year?
☐ None
☐ Under 100, specify #_____
☐ 100 to 249
☐ 250 to 499
☐ 500 to 999
☐ 1,000 to 2,499
☐ 2,500 to 4,999
☐ 5,000 or more, specify # _____

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

38. Have you reallocated funds from other areas of your budget to pay for ebooks?
☐ Yes
☐ No

39. If yes, from what other areas or formats did you transfer funds for ebooks? Check all that apply.
☐ Print   ☐ Reference
☐ Nonfiction   ☐ Databases
☐ Periodicals   ☐ Audiobooks
☐ DVDs/Music   ☐ All areas
☐ Other, please specify: _____

40. If you have any comments about ebooks in your library, please write them below. (After answering, skip to incentive Question 43.)

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

41. Why doesn't your library offer ebooks?
☐ No money for ebooks
☐ Users do not have ereading devices
☐ Lack of technical support
☐ Don't understand logistics of ebooks
☐ No demand for them from users
☐ Waiting to see what the best platform will be
☐ Staff or library board resistance
☐ Budget cuts
☐ We are in the process of adding ebooks
☐ Other (specify)_____

42. What are your library's plans for ebook purchases in the next two years?
☐ We will definitely purchase ebooks to add to our collection
☐ We may purchase ebooks but it is not a priority
☐ We will definitely NOT purchase ebooks to add to our collection
☐ Other (specify)_____

DEMOGRAPHICS

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

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

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

☐ Library director/Ass't library director librarian
☐ Branch manager/Library manager
☐ Head librarian/Department head
☐ Reference/Information Services librarian
☐ Adult/Public services librarian
☐ Children's/Children's services librarian
☐ Youth services librarian/Young adult librarian
☐ Electronic resources librarian
☐ Technical Services librarian specify)_____
☐ Media/AV librarian

☐ Collection devel./Materials selection
☐ Acquisitions librarian
☐ Systems librarian
☐ Circulation/Access services librarian
☐ Cataloging librarian
☐ Library administrator
☐ Paralibrarian
☐ Library aide
☐ Other (please

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

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

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

49. Would you like to be included in the drawing to win an Apple iPad mini?
☐ Yes
☐ No, thanks

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