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SIXTH ANNUAL SURVEY

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Survey of Ebook Usage in U.S. Public Libraries

September 2015

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Edited by Laura Girmscheid and Barbara Genco

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EXECUTIVE SUMMARY

Since *Library Journal* launched its 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 (based on 317 U.S. public libraries responding) that much of the enthusiasm for ebooks has cooled, it is only because they have become less of a novelty and more mainstream. There are arguments in publishing circles that ebooks were little more than a fad, and that declining sales are evidence of that. However, while ebook sales growth doesn't necessarily match what we saw as recently as a few years ago, the situation is far more complex. Ebooks have a different sales cycle than print books, sales figures don't capture the growing market for independent or self-published ebooks, and sales of fiction books are down for all formats.¹

As for where we stand with regard to ebooks in libraries, the current edition of this survey shows that ebooks are firmly ensconced in public libraries, and if patrons haven't universally adopted them, ebooks have their fans—as do print books, audiobooks, and other forms of content. Indeed, everyone has his or her own preferred format in which to read; some prefer ebooks, some prefer print books, some prefer audiobooks—some prefer combinations of these in different contexts—and libraries are required to support all these formats.² It appears that there will forever be a very small percentage of libraries that will not adopt ebooks—due to a combination of poor finances and low demand—but that will likely be 1–2% of all public libraries overall.

"I think it is good to have different formats for different kinds of patrons. I do not think ebooks will dominate the book market, but they will continue to be a big player. Studies show even teens prefer print and they are the main consumers of the future. So print is here to stay, but ebooks are important, too."

Librarians and publishers may be close to detente around the issue of ebooks. Where once librarians' comments were full of vitriol about price-gouging, poor selection, and horrible service, six years on, the mood has mellowed considerably, and they appear happier with ebook vendors and their offerings. Problems still remain, but the tone is far less contentious than it has been.

Pervasive Ebook Collections

In 2015, 94% of libraries indicated that they offer ebooks to users, down one percentage point from last year. Thirty-one percent of those that do not

¹ Jane Tappuni, "What Nielsen Bookscan data tells us about ebook sales cycles & the ebook plateau," Content Forward, January 20, 2015, <http://www.publishingtechnology.com/2015/01/what-nielsen-bookscan-data-tells-us-about-ebook-sales-cycles-the-ebook-plateau/>.

² There is also a growing trend toward reading on smartphones; see Jennifer Maloney, "The Rise of Phone Reading," Wall Street Journal, August 14, 2015, <http://www.wsj.com/articles/the-rise-of-phone-reading-1439398395>.

currently offer ebooks say they have no plans to add them in the next year. The biggest impediment to adding or expanding ebook offerings is money. Lack of demand for ebooks from patrons is increasing as a factor, but it is far and away economics that keeps ebook adoption short of 100% penetration, especially in very small libraries.

% of public libraries offering ebooks	2010	2011	2012	2013	2014	2015
	72%	82%	89%	89%	95%	94%

The size of public library ebook collections continues to swell. In 2015, the median number of ebooks that libraries offer exceeds 14,000 titles, almost double what it was as little as two years ago. By way of comparison, the median number of print volumes that public libraries offer is 120,000 (ebooks comprising 11% of total p- and e- collections).

Ebook collections	2010	2011	2012	2013	2014	2015
Median # of ebooks	813	1,750	5,080	7,380	10,484	14,397

"I believe that we need to include this format for our library patrons. If we are not part of the solution, we will be part of the problem and will become obsolete. Personally, I love the format and encourage everyone to at least try one. We have a fair number of people who are computer challenged so we need to continue to find ways to simplify the process. Digital is not going away. We just need to find the best way to use it."

Increases in Circulation Slow

Respondents reported a median circulation of 12,400 ebooks in fiscal year 2014, which is down from the previous year. Last year, we saw circulation begin to slow down, and next year's survey will give us a better idea of whether the drop this year is an anomaly or a trend. In comparison, median print book circulation in the last fiscal year was 243,000.

Ebook circulation	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014
Median ebook circulation	2,600	5,000	12,139	13,418	12,400

The overall change in ebook circulation anticipated for the current fiscal year is +14%. The five year trend of anticipated change is further indication that ebook circulation—and thus demand—is slowing down.

Anticipated change in ebook circulation	2011	2012	2013	2014	2015
% change in ebook circulation	+108%	+67%	+39%	+25%	+14%

Bucking a circulation downturn are the very largest libraries (serving populations of 500,000 or more). They reported strong circulation growth through 2014 and anticipate a 25% increase in circulation again this year.

"Our ebook circulation is only about 3% of overall circulation. In a rural mountain area where many people do not have their own ereaders and only have limited time on public computers at the library, this will probably not change much from year to year."

Adult Demand is Highest

Demand for ebooks continues to increase, but is concentrated in adult books, with somewhat less fevered demand for YA and children's ebooks. It should be noted that the bulk of the increase in ebook demand is categorized as "slight" rather than "dramatic." Again, large library systems reported dramatic increases in demand at rates twice as high as smaller sized libraries for both adult and YA ebooks.

<i>Have you experienced a change in demand for ebooks since this time last year?</i>	NET Dramatic + Slight increase	Dramatic increase	Slight increase
Adult ebooks	80%	28%	52%
Young adult ebooks	65%	11%	54%
Children's ebooks	52%	10%	42%

Nearly every library offers ebooks for all three age cohorts (only 4% do not offer any children's ebooks), but adult titles abound. Adult ebooks account for 69% of public libraries' collections, young adult ebooks account for 16%, and children's ebooks represent 15%. The top three categories of ebooks that have experienced the greatest increase in usage in the past year are "general adult fiction," selected by 90% of respondents, "young adult fiction" (61%), and "general adult nonfiction" (50%).

Ebook Collections and Categories

Ebook collections (and readers) heavily favor fiction over nonfiction and 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 58% fiction vs. 42% nonfiction.

Slightly less than half of libraries (46%) offer ebooks in foreign languages. Spanish was by far the language that libraries were likeliest to offer, with Chinese a distant second. The predominant reason for not carrying non-English ebooks is essentially lack of demand.

"We buy slightly fewer print books, but mostly, if we find patrons who read a certain author or subject prefer ebooks, we tend to purchase these only in that format. We also find that with more ebooks available and accessible to our patrons, there is less of a need to purchase print reference titles."

Twenty percent of libraries carry self-published ebooks, 19% do not but would like to, and 61% do not and have no plans to. The reasons they don't are a combination of concerns about review sources, quality, and hosting. Of those libraries that do offer self-published ebooks, the two top drivers are if the author is local (66%) and/or it is a patron request (51%).

Libraries are about more than just books, and offer a wide variety of media content, analog and digital, physical and electronic. Virtually all public libraries (94%) offer downloadable audiobooks, 68% offer downloadable

magazines, and 46% make streaming video available. And while 60% of libraries say that interest in ebooks is growing, 44% also say that interest in streaming audiobooks is growing.

Obstacles to Ereading

Over the past six surveys, we have tracked reasons preventing library patrons from availing themselves of the library's ebook collections. There has been a steady shift away from basic ease of use issues, although some persist. One item that had been growing slowly was "users prefer print," which was selected by 39% of respondents last year. This year, we changed the selection to "users prefer print or other formats," and it leapt to the top of list, selected by 61% of respondents. It's tempting to frame the discussion as a "print book vs. ebook" dichotomy, but audiobooks remain a popular format, and that is likely one of the "other formats" that users prefer.

The number two barrier is patrons "unaware of ebook availability," chosen by 60% of respondents, and down a couple of percentage points from last year. A close third is "long wait times/not enough copies of popular titles" at 50%, up from last year.

Libraries do promote their ebook collections, most commonly using flyers and bookmarks (selected by 62% of respondents), providing ebook lists in the library newsletter (44%), and via social media review links (40%).

Just as with print books, libraries allow users to place holds on ebooks, and purchase additional copies to fulfill holds on high-demand titles. The average holds-to-copy ratio for ebooks is 7:1, a figure that has increased slightly from last year.

"Patrons who are comfortable with the technology love them, but they still complain about how complicated they are to use. If using ebooks were not so frustrating, we would probably see a dramatic increase in usage."

Complaints about Ebooks

The most common complaint that librarians express about ebooks is that "ebook pricing is too high," selected by 34% of respondents. Thirty-one percent continue to feel that the "downloading process is too complicated for patrons," and 21% are unhappy about the panoply of licensing models.

However, the frequency with which librarians hear specific voiced concerns and requests from customers has declined. Specifically:

- "The library does not offer a digital copy of the title I want to borrow" is heard daily or weekly by 26%, down from 33% in 2014;
- "The wait time to borrow ebooks is too long" is heard daily or weekly by 27%, down from 32%;
- "I need help downloading ebooks to my device" is heard daily or weekly by 75%, down from 84%.

We added three additional voiced concerns in 2015:

- “Why can’t I renew library ebooks or keep them late and pay a fine?” is heard daily or weekly by 10%, never or rarely by 73%;
- “Why can’t I return my library ebooks before the due date, to ease wait times for others?” is heard daily or weekly by 9%, never or rarely by 76%;
- “I’ve written an ebook I’d like the library to carry” is heard daily or weekly by 2%, never or rarely by 83%.

Budgets Aren’t Budging

In their last complete fiscal year, public libraries independently purchased or licensed a mean of 2,543 ebook volumes (median 356) and spent on average \$46,700 (median \$8,400) on them. Although the average number of volumes is up, the median is actually down, and, indeed, total spending is down from last year.

We calculated the total spend on ebooks by U.S. public libraries to be nearly \$102 million in the last fiscal year. Over the past five years, ebooks grew from just under 2% of public libraries’ materials budgets to more than 6%. On average, public libraries predict that ebooks will account for 12% of the materials budget in five years (2020).

<i>Population served</i>	<i>Ebook spending as a % of total materials budget (median %)</i>						
	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2020 (projected)</i>
All public libraries	1.7%	3.5%	4.7%	6.1%	7.6%	6.3%	12.1%
< 25,000	1.5%	1.9%	3.9%	3.9%	4.9%	3.8%	8.3%
25,000–99,000	1.8%	3.8%	4.7%	6.4%	6.5%	6.9%	11.5%
100,000–499,000	1.7%	3.5%	6.9%	7.4%	9.2%	12.6%	17.3%
500,000+	1.9%	4.0%	6.9%	6.5%	9.5%	9.0%	17.3%

A challenge for libraries lies in the expansion of ebook collections while continuing to maintain robust print collections and other services. Six out of ten libraries have reallocated funding from elsewhere in their materials budgets to pay for ebooks. Print, reference, and databases took the biggest hits, but 17% say they take a little from all areas to pay for ebooks.

Ebooks continue to have an impact on print collections: one-fourth of libraries report that they now buy fewer print books, while the other three quarters say that ebooks have “no influence on their print book purchasing.”

Ebook Vendors and Licensing Models

In terms of vendors used, OverDrive continues to dominate the ebook market for public libraries. More than nine out of ten libraries use OverDrive to some extent, and 68% preferred OverDrive above all others. (Many write-in comments pointed out that they have improved their service and offerings over the years.) Sixteen percent of respondents have “no preference” for any one vendor.

Membership in a consortium is one way that public libraries gain access to a larger breadth of ebook titles, and consortium membership is at an all-time high, with 72% of libraries being consortium members.

"Being part of the Ohio Digital Library consortium is great because our patrons have access to more ebooks than we could ever afford. While we may not have a high percentage of our patrons using them, the ones who do LOVE them."

If librarians had their choice, what would be the number one preferred ebook purchasing/licensing model? The top item, selected 43% of libraries, is "purchase with perpetual access–multi-user." A distant second, selected by 18%, is "purchase with perpetual access–single user." Clearly, some form of perpetual access is key.

The decision to reorder an ebook title when its license expires is essentially based on demand, specifically the holds queue (61%), continuing high demand (52%), and prior circulation (49%). Only about one-third of ebook titles (37.6% mean, 30.0% median) get reordered when their licenses expire.

Conclusions

There is no shortage of data on declining ebook sales—and declining book sales in general, especially fiction. The headline—"Ebook sales declining"—misses some crucial nuances. Traditional sales tracking methodologies don't capture the rise of independent and self-published ebooks, which should not be ignored. It's not just "vanity publishing" anymore.

We have found that the majority of libraries do not offer self-published ebooks, with the primary difficulty being not knowing what's available and what is of sufficient quality. There are few booklists and lists of new releases—or even reviews—to guide them, so unless it's a patron-driven acquisition or a local author, the library has no way of knowing such a book even exists.

Patrons have become more comfortable with ebooks and even if some tried them and decided they didn't like them, it's a format that sits comfortably alongside print and yes, audiobooks (q format which should not be ignored in these conversations). Everyone has their preferred reading format, and public libraries struggle to support them all.

We learned that libraries are happier with ebook vendors and the logistics of ebook buying and downloading than reported in previous years. Sure, complaints persist, especially ebook pricing, but many problems have been resolved.

INTRODUCTION

About the 2015 *Library Journal* Ebook Survey

Welcome to the sixth annual *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, five, even six data points to consider. We tweaked some other questions based on responses to past surveys or to better reflect changes in the market, so some data points may not be entirely consistent with past responses. There is also an assortment of brand new questions this year, reflecting new developments in the ebook landscape.

As always, 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 staff have completely integrated ebooks into their offerings and are simply getting on with it. 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 end of each chapter.

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 data is weighted by library size and gives an overall idea of the prevailing attitude.

In those cases where we have calculated averages, such as “average number of ebooks available,” “average number of ereaders available,” or “average amount spend on ebooks,” we provide both a mean and a median. A *mean* is a simple average, or “the sum of a collection of numbers divided by the number of numbers in the collection.”³ A *median* is “the numerical value separating the higher half of a data sample, a population, or a probability distribution,

³ https://en.wikipedia.org/wiki/Arithmetic_mean.

from the lower half.”⁴ Medians are more useful than means when looking at datasets with outliers—that is, figures that are anomalously high or anomalously low.⁵ For some of the questions in this survey, there were very large outliers that skewed mean figures, so looking at median values gives us a better idea of what the reality is.

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

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

To add a greater historical perspective to recurring questions, we have provided “time series” charts. They’re not always pretty, but provide a quick way to track trends over time.

One change in this year’s report is that we moved the demographic profile of our respondents to Appendix A.

Chapter Structure

Chapter 1 examines ebook “supply and demand.” How many libraries offer ebooks? What factors prevent libraries from amassing ebook collections? How many volumes do they offer? What are the current ebook circulation figures and how are they changing? This year, we asked questions about libraries’ corresponding print book collections and circulation.

Chapter 2 looks at ebook collections and categories. What ebook categories and genres are most in demand from users?

Chapter 3 is all about users and usability. What hindrances prevent users from accessing ebook collections? What top vocalized concerns and requests do library staff members experience?

⁴ <https://en.wikipedia.org/wiki/Median>.

⁵ A classic example of the problem of outliers is if a group of librarians was gathered in a bar. Calculate the average annual income. Suddenly, Bill Gates walks in. Now re-calculate the average annual income. Did everyone just get a massive raise, or did one outlier skew the average upward?

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. Do libraries circulate hardware devices to patrons? Which ones? Are circulating ereaders preloaded with ebooks, or are users allowed to download their own ebooks?

Appendix A offers a demographic profile of the libraries and individuals who responded to our survey.

Appendix B 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 email at lgirmscheid@mediasourceinc.com.

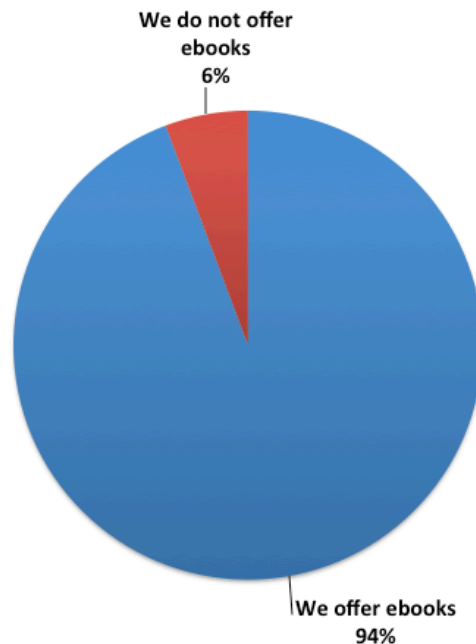
1. SUPPLY AND DEMAND

This chapter looks at the number of ebooks held by the public libraries that responded to our survey, as well as ebook circulation, ebook demand, corresponding print book collection and circulation, and how libraries promote their ebook collections.

Offer Ebooks

Over the past five surveys, the number of public libraries that offer ebooks to patrons had been growing. This year, there is a small, not statistically significant, decline in the percentage of respondents that indicated that they offer ebooks to library users. Last year, 95% of public libraries had indicated that they offered ebooks to users; this year, it was 94%. Not a *huge* decline, but there is some evidence (see Figure 2 on the next page) that ebook adoption has plateaued.

Figure 1. Does your library offer ebooks?
% of public libraries, 2015

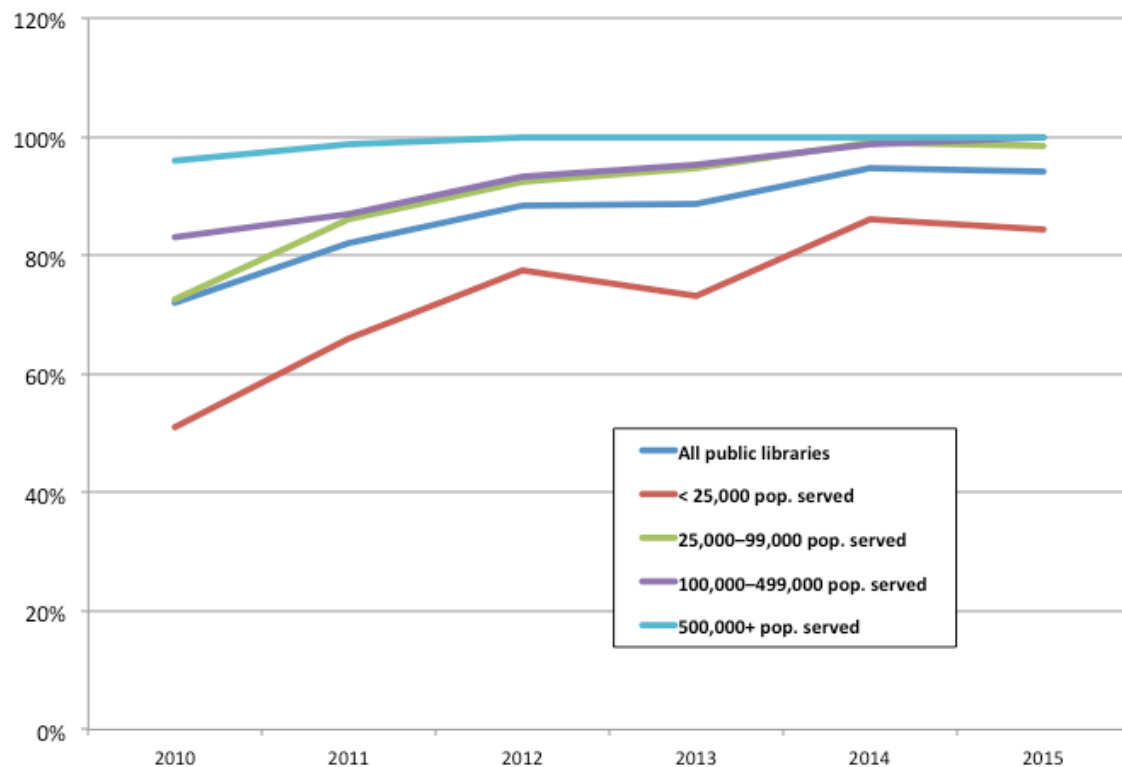


The following table breaks these data down by population served and geographic region. As we remark each year, those libraries that serve smaller populations tend to be lagging behind those that serve larger populations—although they are swiftly catching up. Larger libraries tend to have correspondingly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

Table 1. Does your library offer ebooks?*% of public libraries by population served and geographic region, 2015*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We offer ebooks	84%	98%	100%	100%	87%	100%	91%	96%
We do not offer ebooks	16%	2%	0%	0%	13%	0%	9%	4%

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—more than one-fifth of under-25,000 libraries still report they see “no demand for ebooks.”

Figure 2. Public libraries that offer ebooks*% of public libraries by population served, 2010–2015*

Libraries Without Ebooks

Of those libraries that do not offer any ebooks (6% of all respondents), the top reason is the perennial “no money for ebooks,” unchanged from the last survey. On the other hand, “no demand for them from users” is at an all-time high at 27% of public libraries.

Figure 3. Why doesn't your library offer ebooks?
% of public libraries, 2015

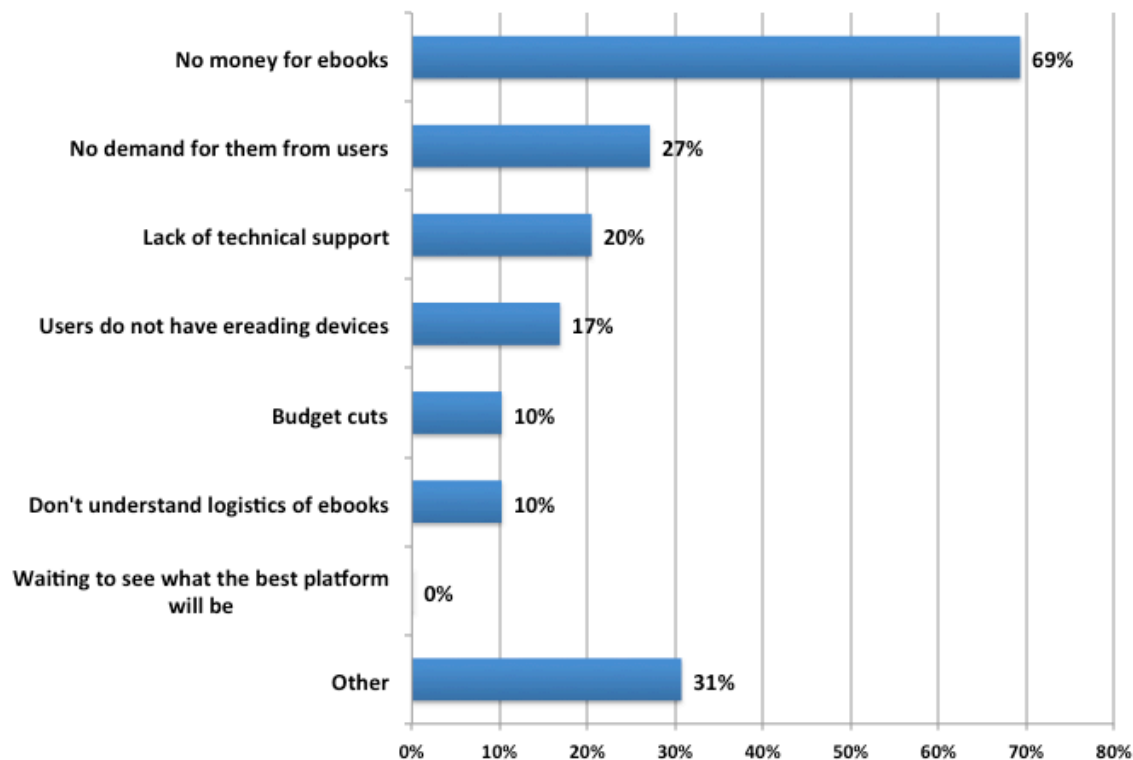
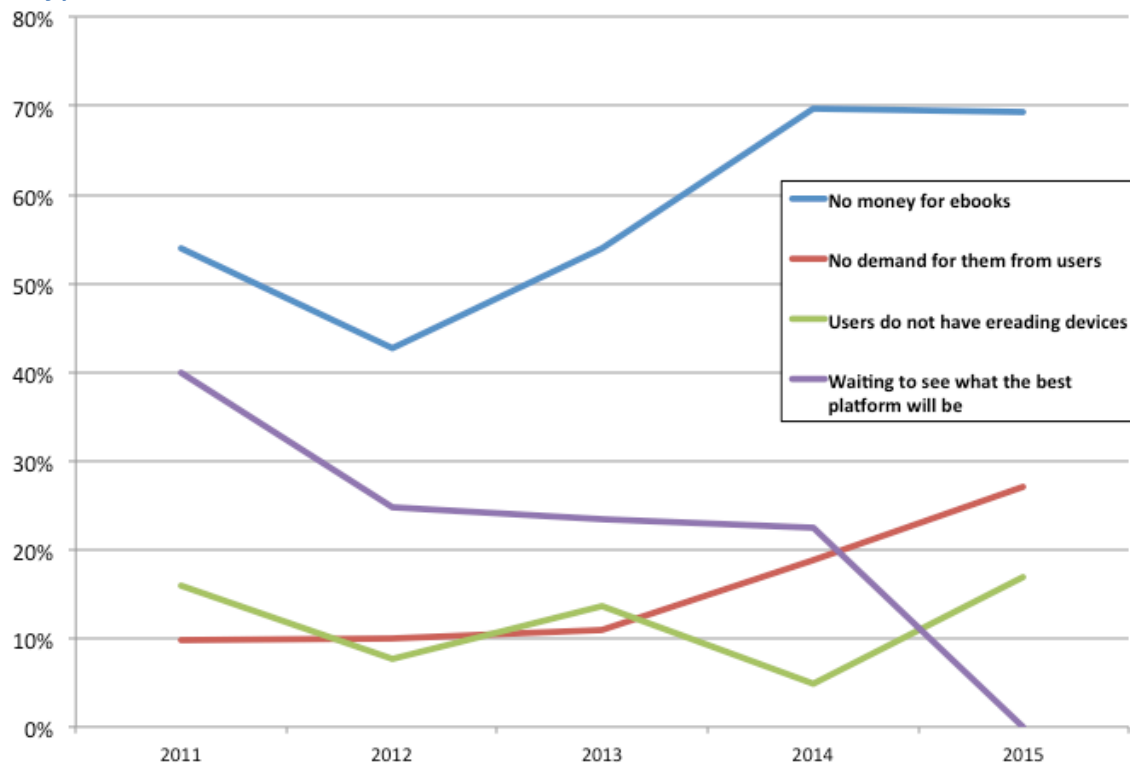


Table 2. Why doesn't your library offer ebooks?
% of public libraries that do not offer ebooks, by population served and geographic region, 2015

	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	67%	100%	0%	0%	58%	0%	100%	67%
No demand for them from users	22%	100%	0%	0%	35%	0%	50%	0%
Lack of technical support	22%	0%	0%	0%	21%	0%	50%	0%
Users do not have ereading devices	11%	100%	0%	0%	35%	0%	0%	0%
Don't understand logistics of ebooks	11%	0%	0%	0%	0%	0%	50%	0%
Budget cuts	11%	0%	0%	0%	0%	0%	50%	0%
Waiting to see what the best platform will be	0%	0%	0%	0%	0%	0%	0%	0%
Other	33%	0%	0%	0%	21%	0%	50%	33%

The data for this question have not been particularly robust, as the response base to this question has generally been small (less than 20% of all respondents in the early surveys, and 5–6% in the last two). Be that as it may, “no money for ebooks” remains the top reason for not adding ebooks—although it is down a hair from last year. “No demand from users” is almost double what it was in 2011, and while “users do not have ereading devices” has been an up and down affair, it is at a historical high this survey, which seems peculiar given what we know about the proliferation of tablets, ereaders, and even smartphones. Still, no one seems to be “waiting to see what the best platform will be” any longer.

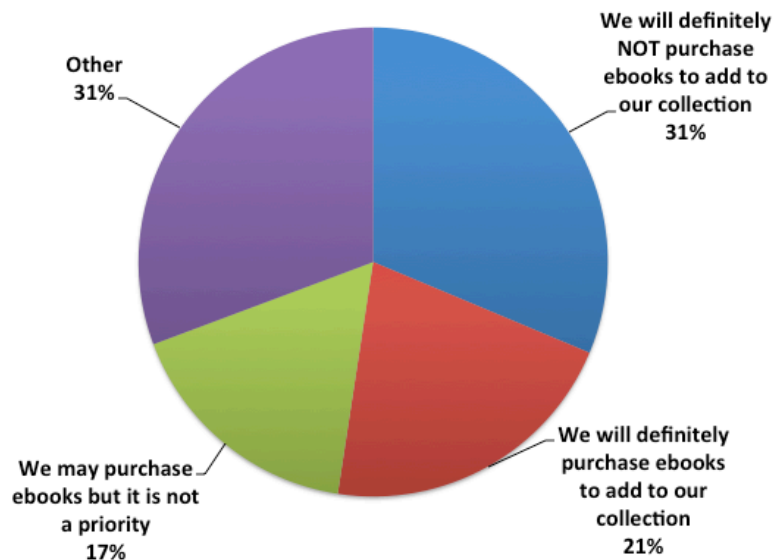
Figure 4. Why doesn't your library offer ebooks?
% of public libraries, 2011–2015



Ebook Plans

Of the 6% of public libraries that do not offer ebooks, nearly one-third (31%) has ruled out ever buying ebooks. Still, that only accounts for less than 2% of all public libraries. On the other hand, 21% say they definitely will be adding ebooks to their collections, while 17% may add them, but haven't yet made it a priority.

Figure 5. What are your library's plans for ebook purchases in the next two years?
% of public libraries that do not currently offer ebooks, 2015



As always it is the smaller libraries that say they will not be acquiring any ebooks in the next two years.

Table 3. 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, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
We will definitely NOT purchase ebooks to add to our collection	33%	0%	0%	0%	22%	0%	50%	33%
We will definitely purchase ebooks to add to our collection	22%	0%	0%	0%	43%	0%	0%	0%
We may purchase ebooks but it is not a priority	11%	100%	0%	0%	14%	0%	50%	0%
Other	33%	0%	0%	0%	21%	0%	0%	67%

How Long Libraries Have Offered Ebooks

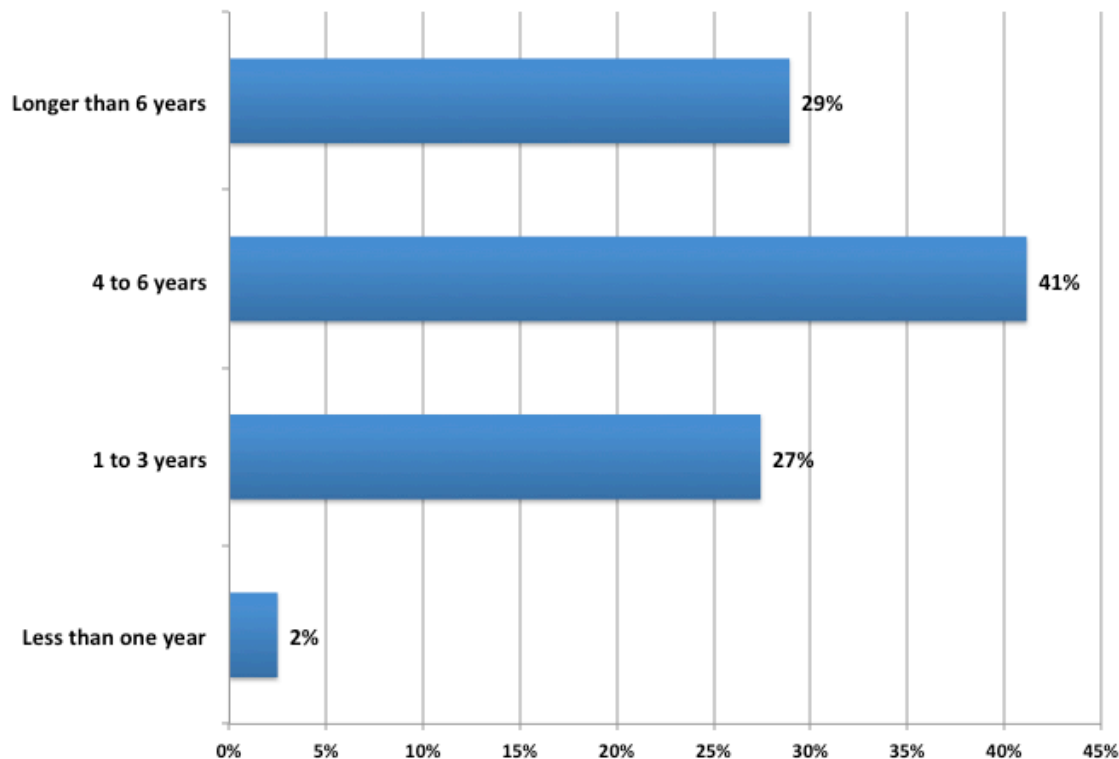
As of 2015, public libraries have been offering ebooks to users, on average, for 4.6 years, up—logically—from 3.8 years as reported in last year's survey. Forty-one percent of 2015 respondents said that they have carried ebooks for four to six years, and 29% for six years or more. Only 2% have offered ebooks for less than one year.

Figure 6. How long has your library offered access to ebooks?

% of public libraries, 2015

Mean: 4.6 years

Median: 5.0 years



The very largest libraries have offered ebooks for six and a half years on average, compared to just under four years for smaller libraries.

Table 4. How long has your library offered access to ebooks?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Less than one year	6%	0%	2%	0%	3%	0%	5%	3%
1 to 3 years	43%	27%	18%	0%	28%	33%	18%	26%
4 to 6 years	39%	45%	42%	29%	42%	38%	40%	44%
Longer than 6 years	12%	27%	38%	71%	27%	29%	37%	27%
Mean # years	3.7	4.7	5.1	6.4	4.5	4.6	5.0	4.6
Median # years	4.1	5.0	5.4	7.3	4.9	4.9	5.3	5.0

How Many Ebooks?

The mean number of ebooks to which public libraries have access is 30,512. 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 14,397, up from 10,484 last year.

Figure 7. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?

% of public libraries, 2015

Mean: 30,512

Median: 14,397

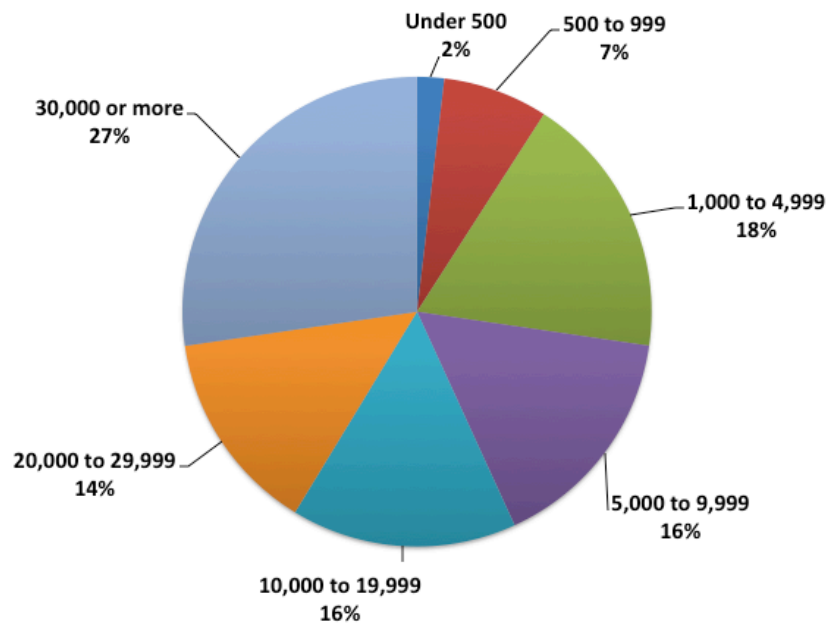


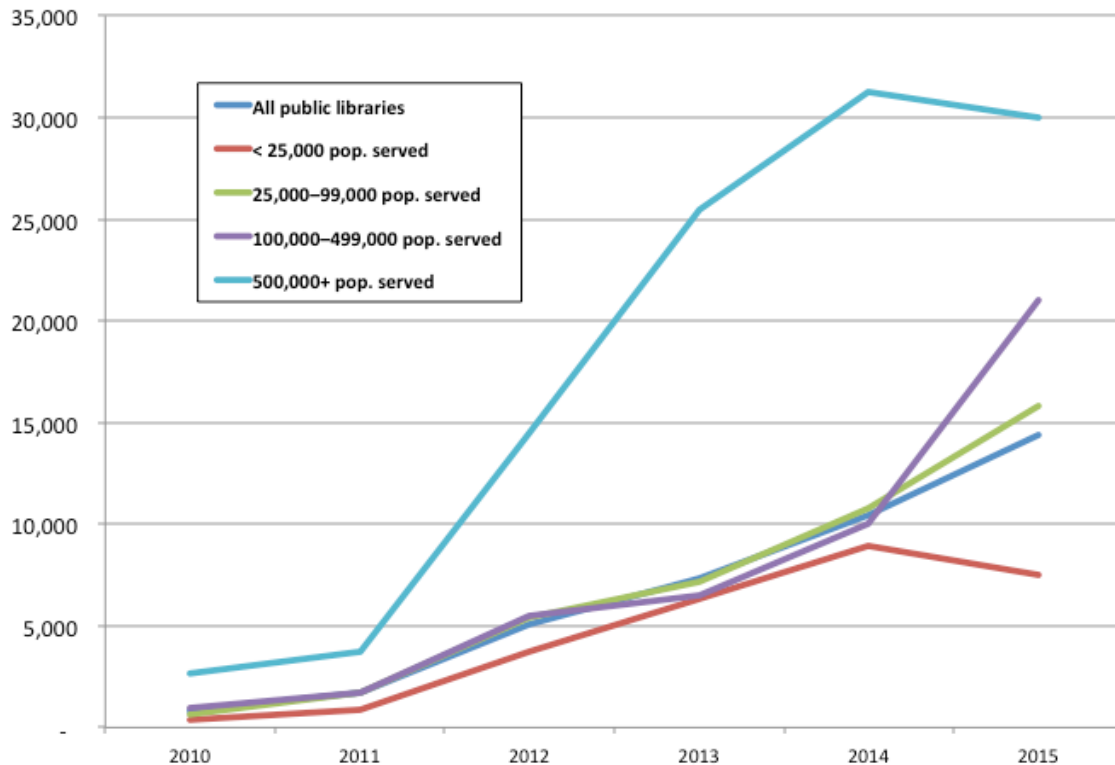
Table 5. How many ebooks does your library have access to in total, including ebooks licensed through your state or regional consortium?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Under 500	4%	0%	2%	0%	0%	2%	5%	2%
500 to 999	10%	5%	7%	0%	11%	12%	5%	3%
1,000 to 4,999	27%	18%	13%	7%	25%	21%	10%	16%
5,000 to 9,999	18%	16%	16%	7%	7%	23%	23%	12%
10,000 to 19,999	12%	19%	11%	21%	11%	13%	7%	22%
20,000 to 29,999	14%	16%	11%	14%	16%	20%	5%	12%
30,000 or more	14%	26%	40%	50%	30%	10%	45%	33%
Mean # ebooks	13,984	27,360	36,598	85,565	29,020	13,766	43,121	39,437
Median # ebooks	7,500	15,833	21,000	30,000	16,509	8,361	20,204	17,704

Figure 8 tracks 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 30,000 five years later), although median number of titles dipped by a thousand or so titles in the past year. Smaller libraries have been more modestly increasing their collections, although they too saw a dip in median titles in the past year.

Figure 8. Median number of ebooks library has access to public libraries by population served, 2010–2015



Print Book Collection

We added a new question to this year's survey to put the size of ebook collections in perspective by asking the size of their print book collections. The mean number of print book volumes contained in public libraries' collections is 401,000 and the median is 120,000. That's eight times as many print books as ebooks.

Figure 9. For comparison, what is the approximate size of your print book collection (number of volumes)?

% of public libraries, 2015

Mean: 401,000

Median: 120,000

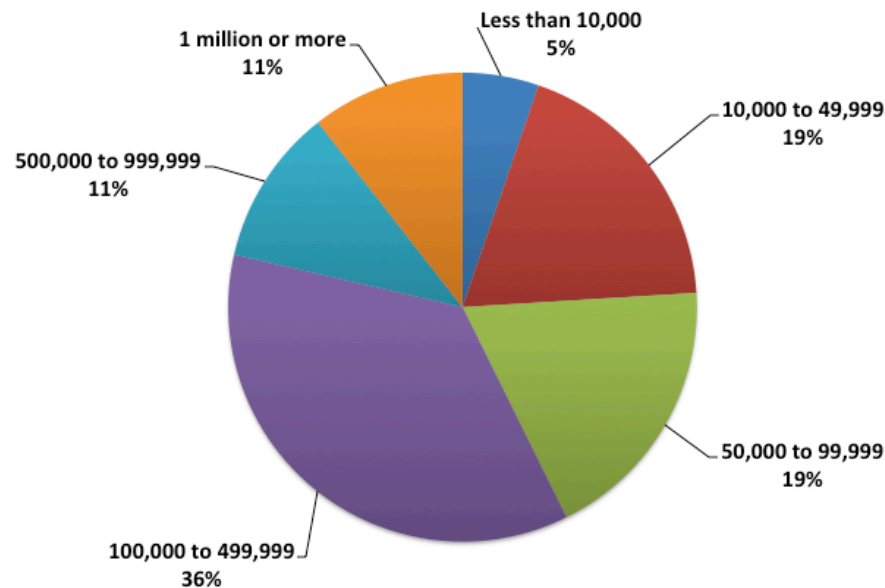


Table 6. For comparison, what is the approximate size of your print book collection (number of volumes)?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Less than 10,000	8%	3%	0%	8%	0%	14%	0%	3%
10,000 to 49,999	51%	9%	0%	0%	9%	26%	21%	17%
50,000 to 99,999	31%	26%	2%	0%	13%	18%	9%	25%
100,000 to 499,999	8%	55%	48%	0%	65%	29%	22%	32%
500,000 to 999,999	2%	3%	29%	15%	10%	3%	31%	11%
1 million or more	0%	3%	21%	77%	3%	10%	17%	12%
Mean # volumes	69,156	245,824	720,524	2,227,806	286,935	315,235	592,388	455,625
Median # volumes	36,000	114,300	459,616	2,000,000	200,000	72,000	400,000	120,000

Demand for Ebooks

This year, we changed the question related to increases and decreases in patron demand for ebooks. Rather than general ebook demand, we asked about demand for specific types of ebooks: adult, young adult, and children's.

The net increase in demand (dramatic and slight) for ebooks is:

- Adult ebooks: 80%
- Young adult ebooks: 65%
- Children's ebooks: 52%

The complementary report on ebook usage in school libraries sheds some light on this, as kids and young adults are not as enthused about ebooks (they increasingly prefer printed books) as their elders.

Figure 10. Have you experienced a change in demand for adult ebooks since this time last year?
% of public libraries, 2015

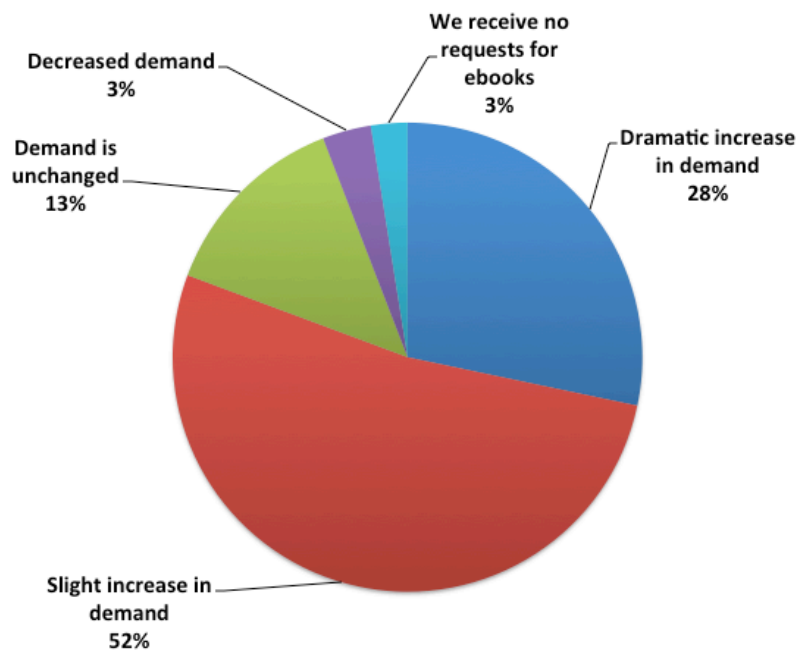


Figure 11. Have you experienced a change in demand for young adult ebooks since this time last year?
% of public libraries, 2015

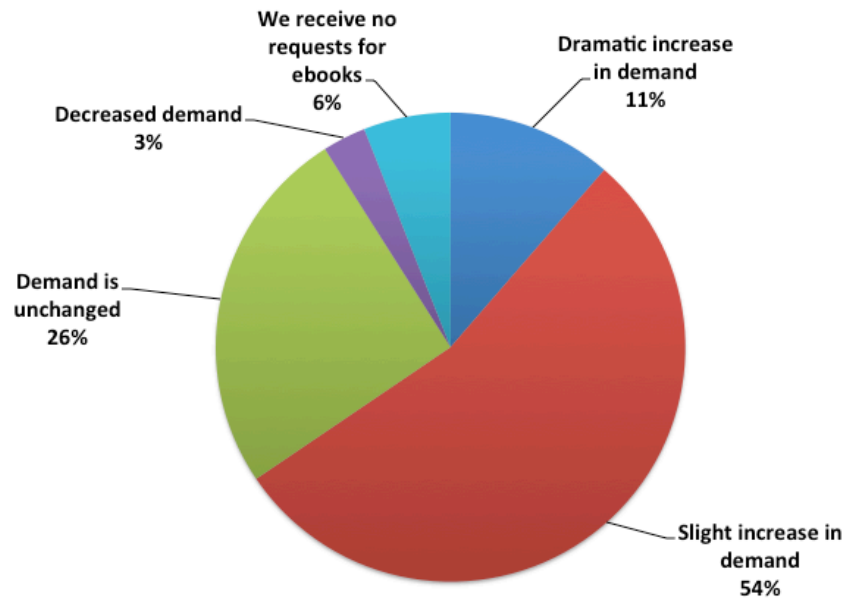
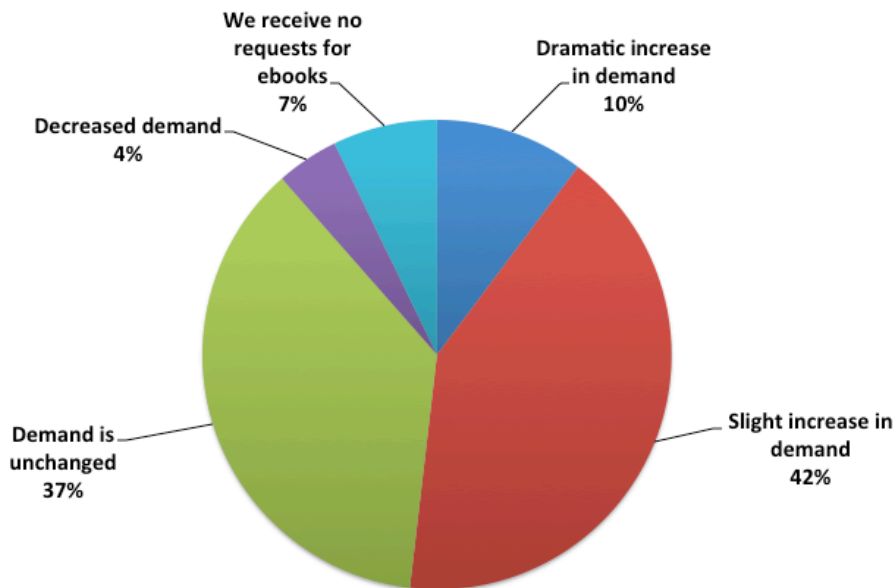


Figure 12. Have you experienced a change in demand for children's ebooks since this time last year?
% of public libraries, 2015



Demand in the largest libraries and libraries in the West experienced the most dramatic increase in demand, particularly for adult ebooks.

Table 7. Have you experienced a change in demand for ebooks (by category) since this time last year?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Adult Ebooks								
Dramatic increase in demand	30%	21%	23%	57%	17%	36%	45%	23%
Slight increase in demand	43%	60%	61%	36%	48%	42%	43%	65%
Demand is unchanged	17%	11%	14%	0%	24%	18%	5%	7%
Decreased demand	4%	3%	2%	7%	6%	0%	2%	5%
We receive no requests for ebooks	4%	5%	0%	0%	4%	4%	5%	0%
Young Adult Ebooks								
Dramatic increase in demand	7%	13%	9%	21%	7%	12%	13%	13%
Slight increase in demand	50%	50%	63%	50%	44%	46%	63%	62%
Demand is unchanged	33%	25%	21%	21%	39%	28%	17%	20%
Decreased demand	0%	3%	7%	7%	2%	4%	2%	3%
We receive no requests for ebooks	11%	8%	0%	0%	8%	11%	5%	2%
Children's Ebooks								
Dramatic increase in demand	4%	10%	14%	14%	8%	13%	16%	8%
Slight increase in demand	35%	36%	51%	43%	35%	33%	59%	45%
Demand is unchanged	48%	41%	26%	21%	45%	36%	18%	39%
Decreased demand	2%	5%	5%	14%	0%	10%	2%	3%
We receive no requests for ebooks	11%	8%	5%	7%	12%	8%	5%	5%

Ebook Circulation

In our current survey, respondents reported a mean circulation/usage of 75,600 ebooks (median 12,400) in fiscal year 2014 (or their most recent fiscal year). Mean circulation is up 12% from 67,481 ebooks last year, although median circulation is down 7.5% from 13,418 last year. So demand is muted. Overall, more than one-half (58%) reported that they circulated 10,000 or more ebooks in 2014.

Figure 13. Approximately what was your total ebook usage/circulation in 2014 (or your last complete fiscal year)?

% of public libraries, 2015

Mean ebook circulation: 75,600

Median ebook circulation: 12,400

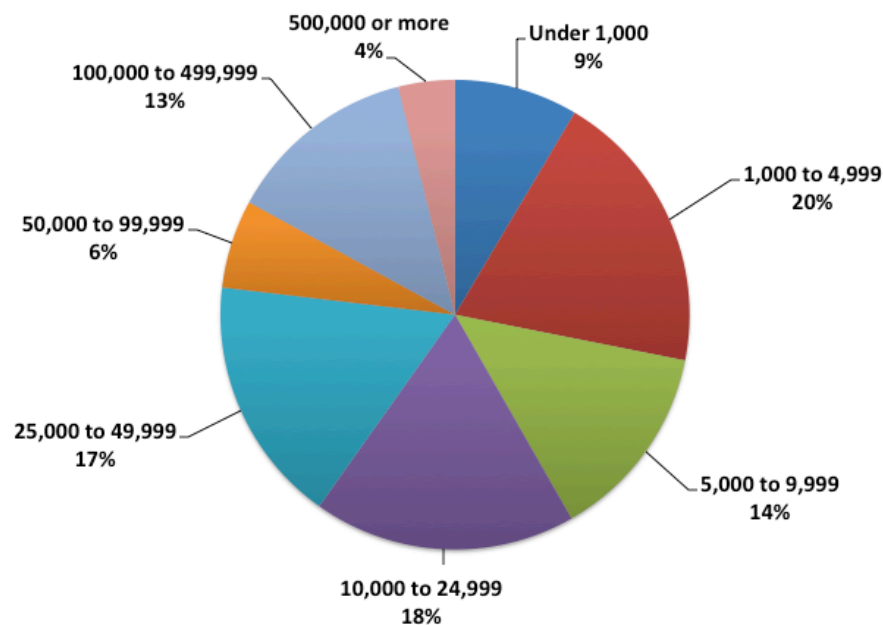


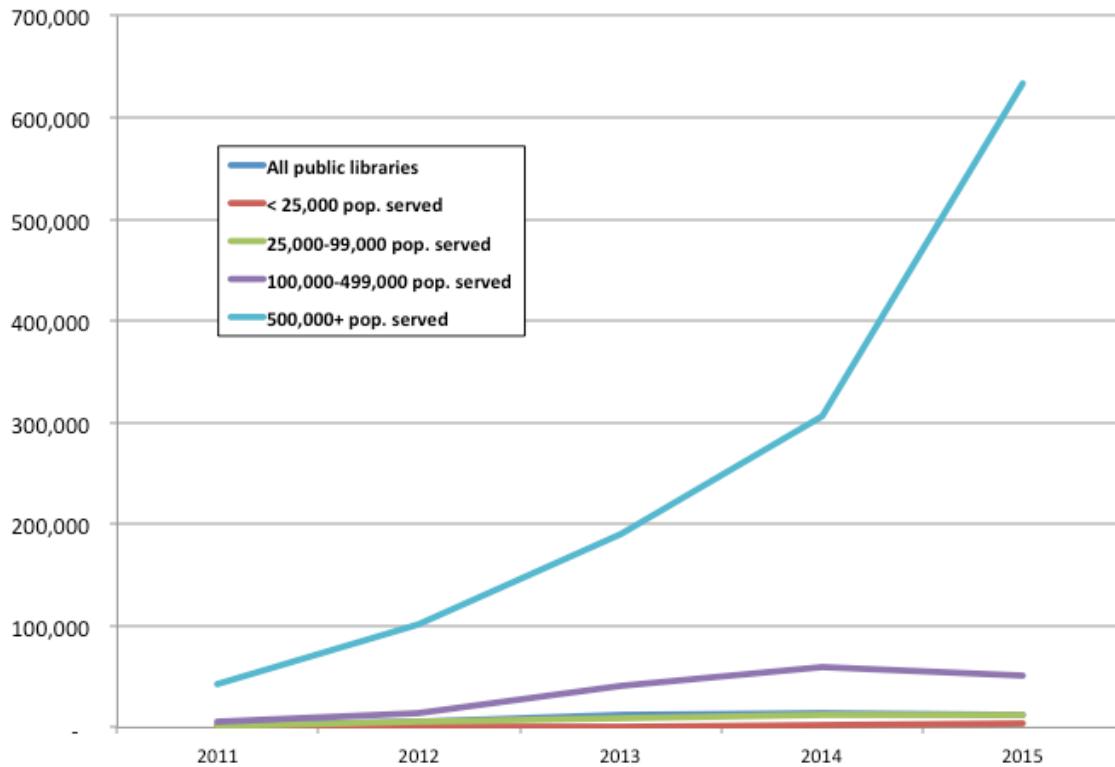
Table 8. Approximately what was your total ebook usage/circulation for 2014 (or your last complete fiscal year)?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Under 1,000	20%	4%	3%	0%	10%	14%	6%	5%
1,000 to 4,999	39%	23%	3%	0%	11%	35%	10%	15%
5,000 to 9,999	25%	11%	5%	0%	19%	12%	12%	13%
10,000 to 24,999	11%	28%	13%	8%	14%	18%	6%	23%
25,000 to 49,999	2%	26%	24%	0%	21%	15%	19%	16%
50,000 to 99,999	0%	8%	13%	0%	13%	0%	15%	5%
100,000 to 499,999	2%	0%	39%	31%	12%	5%	19%	18%
500,000 or more	0%	0%	0%	62%	0%	1%	14%	5%
Mean ebook circ	10,051	20,329	109,539	602,880	51,657	28,818	159,916	93,042
Median ebook circ	4,081	12,701	50,392	634,147	22,320	6,000	42,068	15,000

Figure 14 tracks median ebook circulation for the past four years. Circulation continues to soar for the largest libraries, but is flat or down slightly for all other libraries.

Figure 14. Median ebook usage/circulation for the previous fiscal year
Public libraries by population served, 2011–2015



Print Book Circulation

What is the corresponding print book circulation? We added this question to our 2015 survey and found that mean print book circulation in the last fiscal year was 1.1 million (median 243,000). Forty-one percent of libraries circulated more than 500,000 print volumes in 2014. We'll have to wait until next year to see if print book circulation is increasing or decreasing.

Figure 15. What was your total circulation for print materials in 2014?

% of public libraries, 2015

Mean print book circulation: 1.1 million

Median print book circulation: 243,000

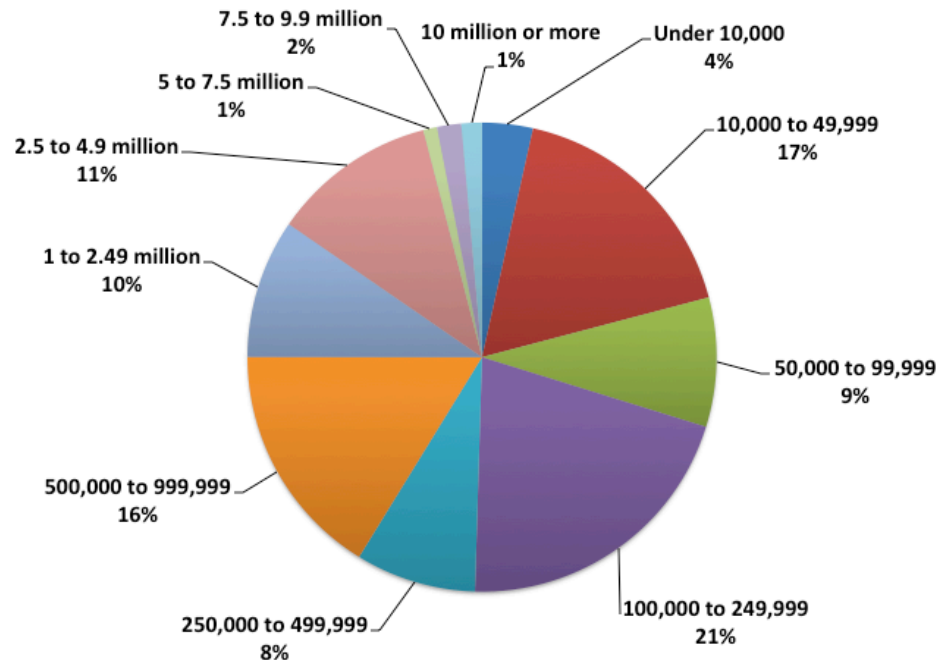


Table 9. What was your total circulation for print materials in 2014?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,999	100,000-499,999	500,000+	Midwest	North-east	West	South
Under 10,000	11%	0%	0%	0%	0%	10%	0%	2%
10,000 to 49,999	47%	6%	0%	0%	3%	27%	28%	13%
50,000 to 99,999	17%	11%	0%	0%	13%	5%	9%	10%
100,000 to 249,999	21%	36%	11%	0%	22%	26%	6%	21%
250,000 to 499,999	2%	15%	11%	0%	21%	10%	0%	5%
500,000 to 999,999	2%	25%	22%	0%	20%	11%	6%	21%
1 to 2.49 million	0%	8%	22%	8%	4%	5%	21%	12%
2.5 to 4.9 million	0%	0%	30%	38%	17%	2%	16%	14%
5 to 7.5 million	0%	0%	3%	8%	0%	2%	2%	0%
7.5 to 9.9 million	0%	0%	0%	23%	0%	1%	11%	0%
10 million or more	0%	0%	3%	23%	0%	0%	2%	3%
Mean print circ	79,731	379,252	1,945,814	7,432,343	902,227	501,969	2,181,509	1,239,803
Median print circ	43,138	243,422	1,250,941	6,500,000	381,554	150,000	1,042,484	265,000

Changes in Circulation/Usage

As is typically the case, the majority (83%, down from 88% last year) of libraries expect ebook circulation to increase this year compared to last year, while 17% (up from 12% last year) expect it to remain the same. One percent anticipates a decrease.

Overall, respondents expect a net 13.5% increase in ebook circulation for this year (down from +25% in 2014). Libraries serving populations of 500,000 or more match last year's overall +25% estimate.

Figure 16. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?

% of public libraries, 2015

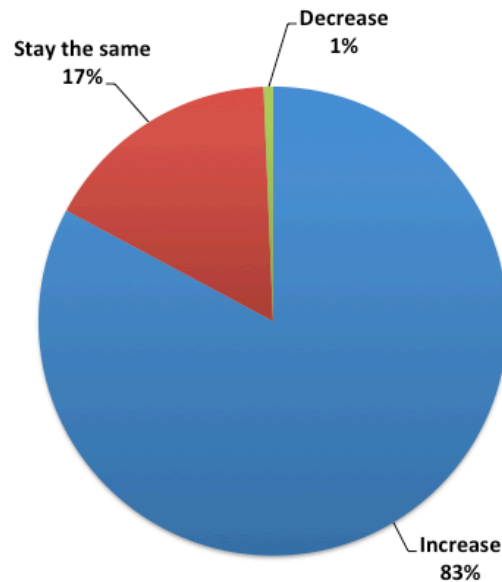


Table 10. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?

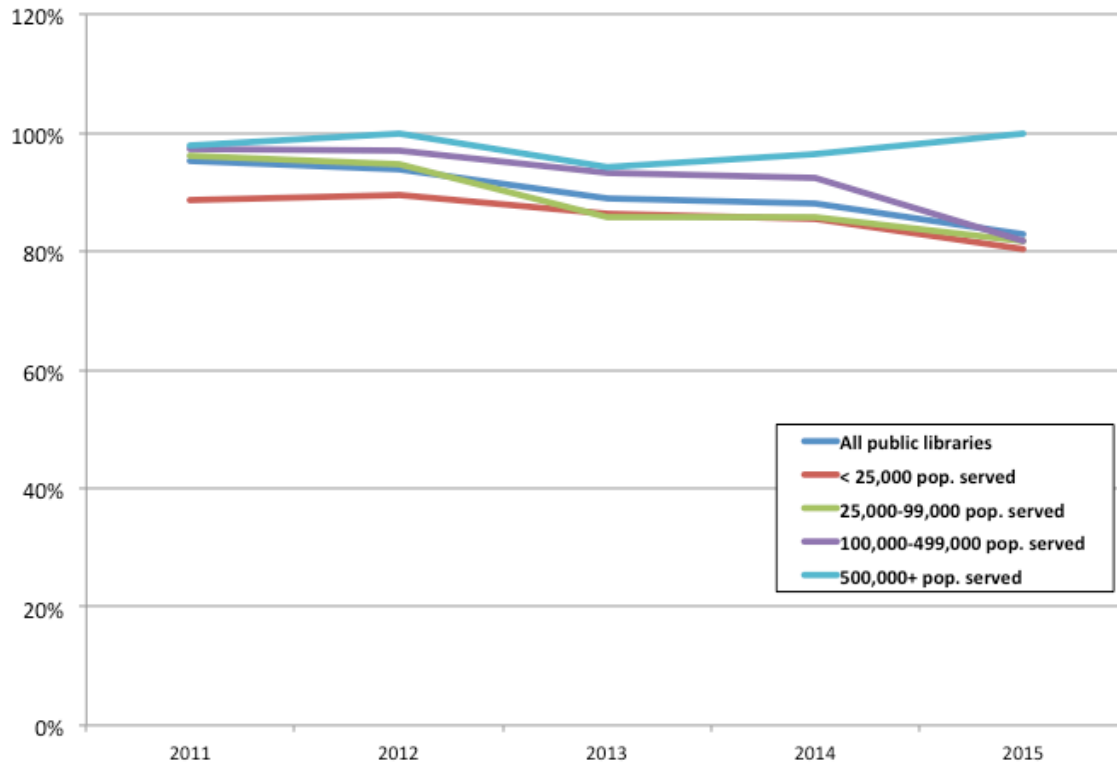
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Increase	80%	82%	82%	100%	78%	77%	79%	90%
Stay the same	20%	18%	16%	0%	22%	23%	21%	8%
Decrease	0%	0%	2%	0%	0%	0%	0%	2%
Overall % change	13.0	11.5	14.5	24.9	13.0	12.2	18.3	13.3

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 17), we look at respondents who, in general, expect ebook circulation/usage to increase. Save for the largest libraries, the number of libraries expecting ebook circulation to increase next year is down to all-time lows (but still at 80% or more).

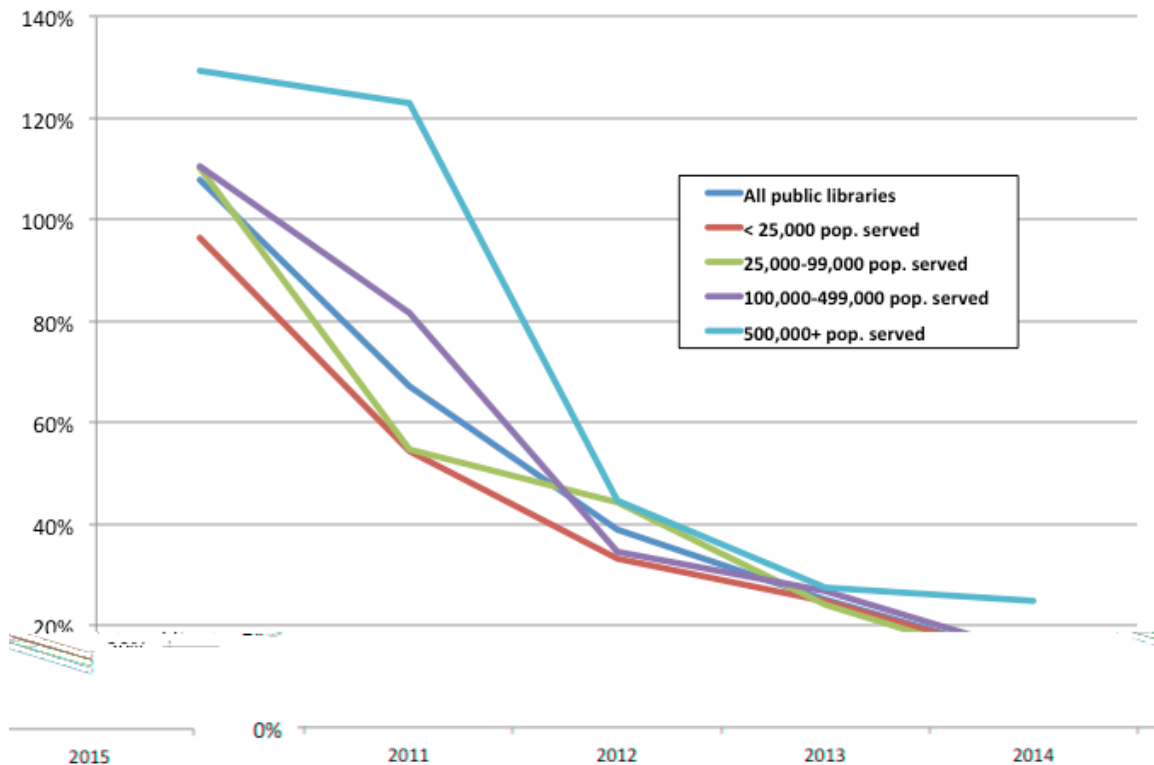
Figure 17. Public libraries that expect ebook circulation/usage to increase in the next year compared to the previous year

% of public libraries by population served, 2011–2015



In the second time series (Figure 18), we look at the *magnitude* of 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 18. Overall percentage change in ebook circulation/usage
% increase in ebook circulation, public libraries by population served, 2011–2015



Download vs. Online Reading

We added a new question to the 2015 survey that asked about the percentage of library ebooks that were read online and the percentage that were downloaded. The majority (84.9%) of library ebooks are downloaded, vs. 15.1% that are read online.

Figure 19. Of the library's ebooks that were read in the last year, what percent would you estimate were downloaded and what percent were read online?
% of public libraries, 2015

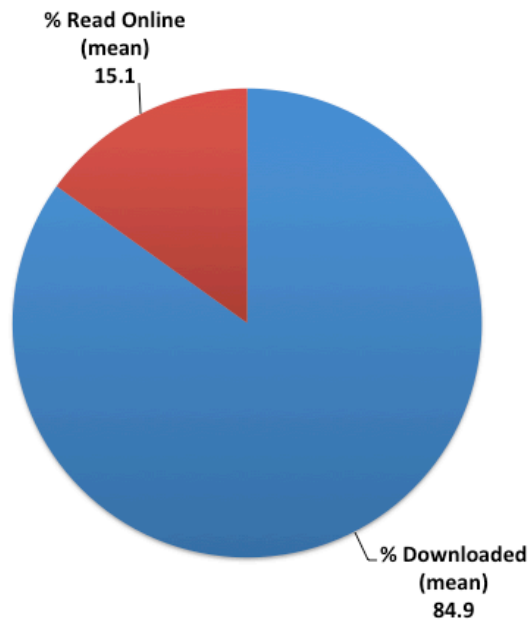


Table 11. Of the library's ebooks that were read in the last year, what percent would you estimate were downloaded and what percent were read online?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
% Downloaded (Mean)	81.9	88.2	86.1	81.0	89.7	89.1	75.9	82.8
% read online (Mean)	18.1	11.8	13.9	19.0	10.3	10.9	24.1	17.2

Holds-to-Copy Ratio

We have found in previous studies that virtually all public libraries allow users to place holds on ebooks, and a majority license or purchase additional copies to fulfill those holds. Over half of responding libraries (55%) have a set holds-to-copy ratio for ebooks in 2015, up from 48% last year. The average holds-to-copy ratio for ebooks is 7:1, up from 6:1 in 2014.

Figure 20. Do you have a set holds-to-copy ratio for ebooks?
% of public libraries, 2015

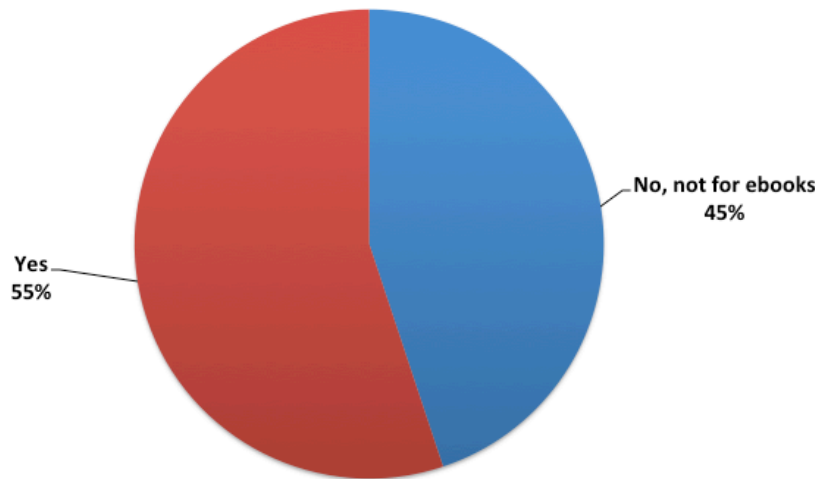
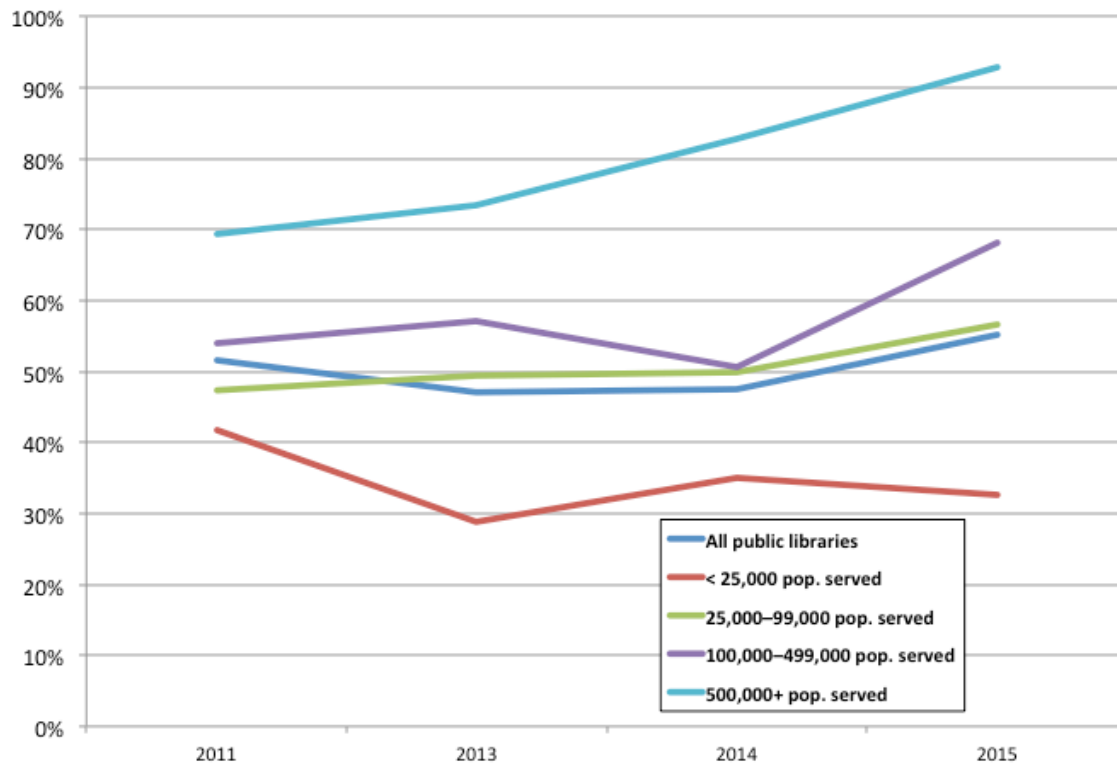


Table 12. Do you have a set holds-to-copy ratio for ebooks?
% of public libraries, by population served and geographical region, 2011–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Yes	33%	57%	68%	93%	45%	60%	48%	58%
Avg. holds-to-copy ratio	7:1	7:1	7:1	5:1	7:1	8:1	7:1	6:1
No, not for ebooks	67%	43%	32%	7%	55%	40%	52%	42%
2014								
Yes	35%	50%	51%	83%	57%	47%	54%	36%
Avg. holds-to-copy ratio	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%
Avg. holds-to-copy ratio	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%
Avg. holds-to-copy ratio	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%

Figure 21. Yes, we have a set holds-to-copy ratio for ebooks
% of public libraries, by population served and geographical region, 2011–2015



Early Return

Unlike print books, which users have to physically return when they are done with them, ebooks “self-return.” On the due date, they are simply “turned off” and are unavailable to the borrower. Depending on the platform, users may return an ebook before the due date. This is helpful, as it makes that title available to another borrower. About three-fourths or 73% of libraries have this feature and one fourth (24%) said that not all of their platforms allow it.

Figure 22. Are ebook borrowers allowed to “return” ebooks before their due date?
% of public libraries, 2015

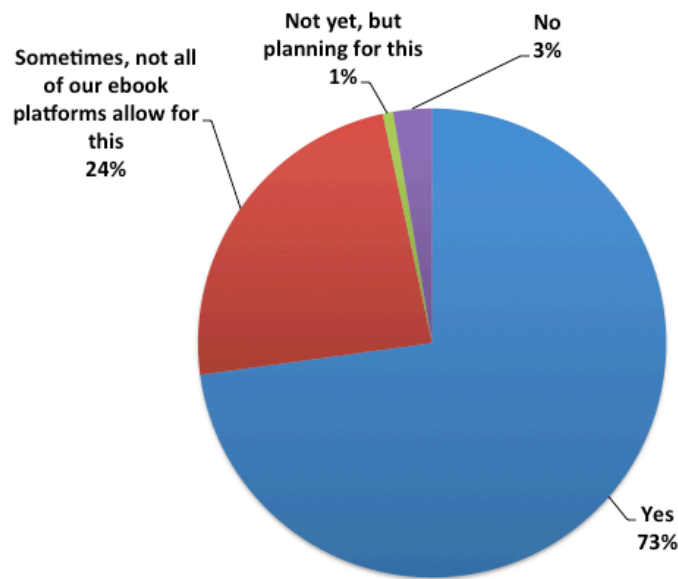


Table 13. Are ebook borrowers allowed to “return” ebooks before their due date?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	76%	73%	76%	71%	70%	77%	72%	71%
Sometimes, not all of our ebook platforms allow for this	22%	24%	22%	21%	30%	16%	28%	25%
Not yet, but planning for this	0%	2%	0%	0%	0%	3%	0%	0%
No	2%	2%	2%	7%	0%	4%	0%	4%

Facilitating Discoverability

In older surveys, we asked libraries how they promoted their ebook collections. In 2015, flyers and bookmarks are the top means by which libraries “facilitate discovery” of their ebook collections (selected by 62% of respondents). Forty-four percent use articles about ebooks and ebook lists in the library newsletter, while 40% use articles about ebooks and ebook lists in the library newsletter, while 40% use social media book lists and review links, while 40% use social media book lists and review links.

Figure 23. What is your library doing to facilitate patron ebook discovery?
% of public libraries, 2015

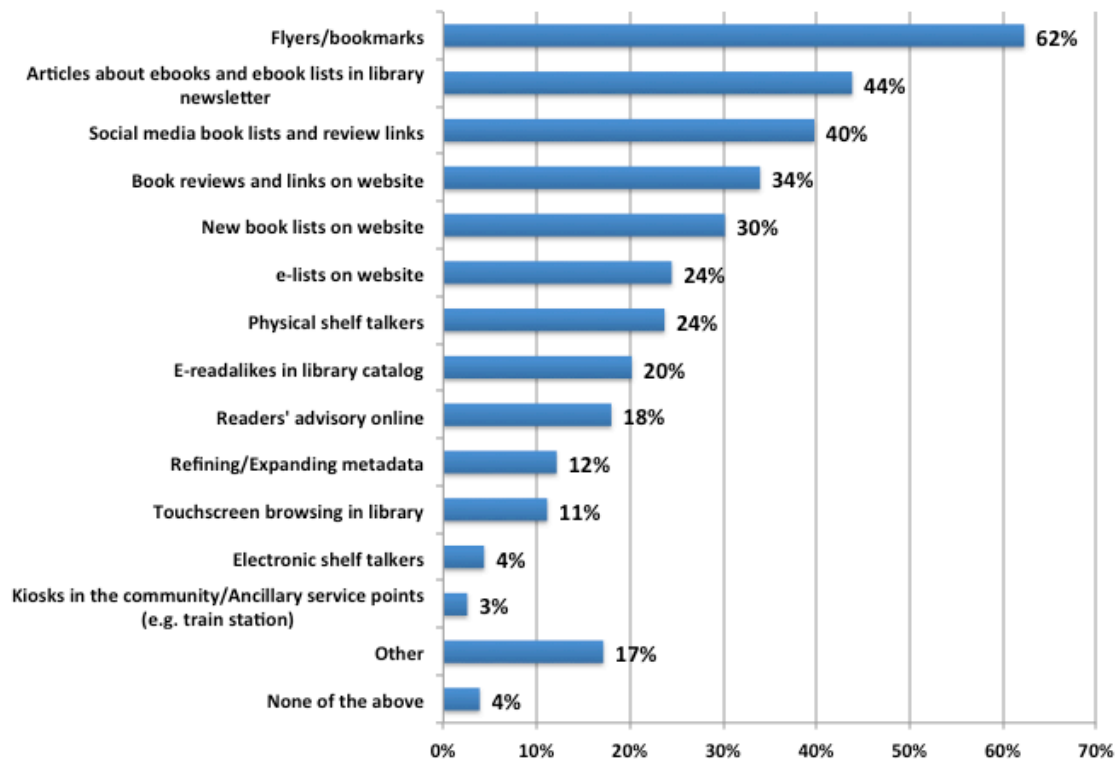


Table 14. What is your library doing to facilitate patron ebook discovery?/ How do you promote your ebook collection?

% of public libraries by population served and geographic region, 2013 vs. 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Flyers/bookmarks	71%	66%	62%	29%	70%	74%	44%	56%
Articles about ebooks and ebook lists in library newsletter	43%	51%	42%	36%	40%	44%	39%	47%
Social media book lists and review links	35%	46%	40%	50%	42%	45%	30%	38%
Book reviews and links on website	29%	33%	40%	43%	31%	31%	39%	36%
New book lists on	18%	28%	36%	57%	34%	36%	23%	27%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
website								
e-lists on website	22%	21%	24%	36%	28%	28%	18%	22%
Physical shelf talkers	22%	20%	29%	29%	24%	16%	33%	26%
E-readalikes in library catalog	16%	18%	18%	50%	14%	23%	26%	20%
Readers' advisory online	10%	16%	24%	36%	12%	16%	30%	19%
Refining/Expanding metadata	8%	8%	18%	36%	12%	7%	27%	11%
Touchscreen browsing in library	6%	5%	20%	14%	5%	6%	13%	17%
Electronic shelf talkers	6%	7%	2%	7%	2%	9%	11%	0%
Kiosks in the community/Ancillary service points (e.g. train station)	6%	0%	2%	0%	0%	5%	0%	3%
Other	18%	20%	16%	14%	15%	20%	23%	14%
None of the above	4%	3%	4%	7%	7%	2%	2%	4%

In Summary

Ebook growth has plateaued in public libraries; indeed, this year, we saw a very slight decline in the number of public libraries that offer ebooks to their users. It may not be statistically significant, but it is telling nonetheless. About 1% of all public libraries—typically the smallest—say they will definitely *not* be adding ebooks to their collections, and we expect to take them at their word. The number of ebooks that libraries offer is also increasing, but not as strongly as in the past, and in the smallest libraries, the number of volumes is down. Ebook circulation for 2014 is flat or slightly down compared to the previous year, except in the biggest of libraries where it continues to soar. Libraries are tempering their expectations of future increases in circulation; this is the most bearish we have seen them in six surveys.

The top reason for libraries to decide not to add ebooks is the usual one: no money. Still, lack of demand and a creeping increase in preference for print books are also playing a role.

Adult ebooks are in more demand than young adult or children's ebooks, and by a fairly wide margin.

A combination of flyers and bookmarks, articles in the library newsletter, and social media are the top ways that libraries promote their ebook collections to their users.

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).

- *“Ebooks are a very popular service among a wide range of age groups.”*
- *“Access is too difficult. Interest is low. Most patrons don’t know about the pricing problems and they wouldn’t like it if they did.”*
- *“Ebooks are a great idea. But at present the software is too hard to use, and the cost of owning an ebook reader or other device is a huge barrier for many of our patrons. We would buy more ebooks and work harder to introduce patrons to them if the purchase price were comparable to print copies.”*
- *“I believe that we need to include this format for our library patrons. If we are not part of the solution, we will be part of the problem and will become obsolete. Ebooks will not replace all print materials, but libraries will be moving more and more of their funding to this format in the future. Personally, I love the format and encourage everyone to at least try one. We have a fair number of people who are computer challenged so we need to continue to find ways to simplify the process. Digital is not going away. We just need to find the best way to use it.”*
- *“I feel budget constraints are holding back the number of people who use ebooks. If we were able to add more titles and copies, circulation would likely surge even more than it is now.”*
- *“I foresee the growth of ebook purchasing and use in the next 5 years.”*
- *“I would love to be able to have a single point discovery mode for print and electronic materials (with the ability to filter). However, I’m given to understand that I’m in the minority in our staff.”*
- *“We’re just getting started on the purchase of ebooks, NOW we have to sell them to the kids. They still prefer print.”*
- *“Our circulation of ebooks increased 300% from 2013 to 2015.”*
- *“Our ebook circulation is only about 3% of overall circulation. In a rural mountain area where many people do not have their own ereaders and only have limited time on public computers at the library, this percentage will probably not change much from year to year.”*
- *“Our ebook circulation numbers increase every year and we consistently have the highest monthly circulation in our state region, an average of 14,764 in 2014.”*
- *“Patrons love the ebooks, seniors are the early adopters but the ones that need the most help getting started.”*
- *“The library here is small and rural. We get summer folks who want a book since the Internet is rather dicey. The year-round patrons are mostly seniors and want nothing to do with ereaders.”*
- *“They are a smaller part of our service offerings than I initially thought they would be, but they are a great service and the patrons who use them appreciate them a great deal.”*
- *“Ebooks are amazing, but there is much patron resistance to using them. They think of it*

as a “print vs. digital situation. Also, the user interface isn’t extremely intuitive.”

- *“They seem to be used by only a relatively small number of patrons, but it includes all age groups.”*
- *“We are a small rural library,our patrons seem to mostly prefer print books. We belong to two ebook consortiums, and hope to increase patron awareness of the availability of ebooks that way. We do not plan to buy ebooks individually at this time.”*
- *“We view ebooks as an alternate medium. We try to purchase materials in all available formats to appeal to a wide range of patron preference.”*
- *“When patrons find out that we have ebooks, they are generally amazed and pleased. In most cases, people don’t seem to think about the library as a source for ebooks initially, but once they find out, then they are enthusiastic advocates for more digital content.”*

2. COLLECTIONS AND CATEGORIES

This section looks at the composition of public libraries' ebooks collections, and the top circulating ebook fiction genres and nonfiction subjects.

Fiction vs. Nonfiction

In our 2013 survey, we added a question to gauge the relative sizes of libraries' fiction vs. nonfiction ebook collections, which we reprised last year. Last year, we also asked how that ratio compared to that of libraries' *print* book collections.

This year, on average, 74% of public libraries' ebook collections were fiction titles, while 26% were nonfiction. These percentages have not changed in two years. The fiction/nonfiction split among print books is 57% fiction vs. 43% nonfiction, which is unchanged from last year.

Figure 24: Approximately what percent of the *ebooks* you have available are fiction titles vs. nonfiction titles?

% fiction vs. % nonfiction, all public libraries, 2015

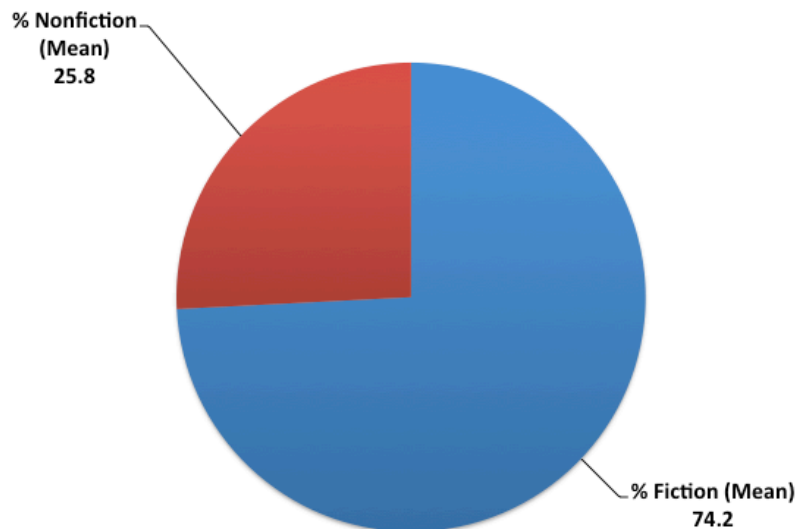


Figure 25. Approximately what percent of the *print books* you have available are fiction titles vs. nonfiction titles?

% fiction vs. % nonfiction, all public libraries, 2015

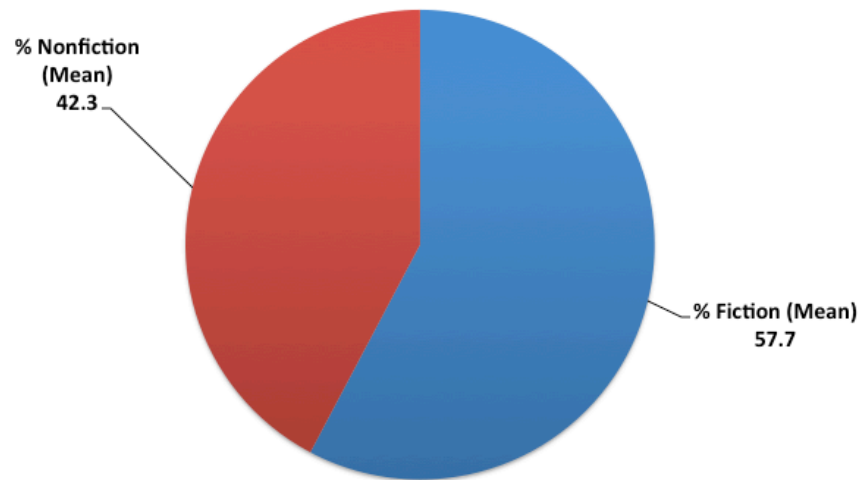


Table 15. Approximately what percent of the *ebooks* and *print books* you have available are fiction titles vs. nonfiction titles?

% fiction vs. % nonfiction, public libraries by population served and geographic region, 2013–2015

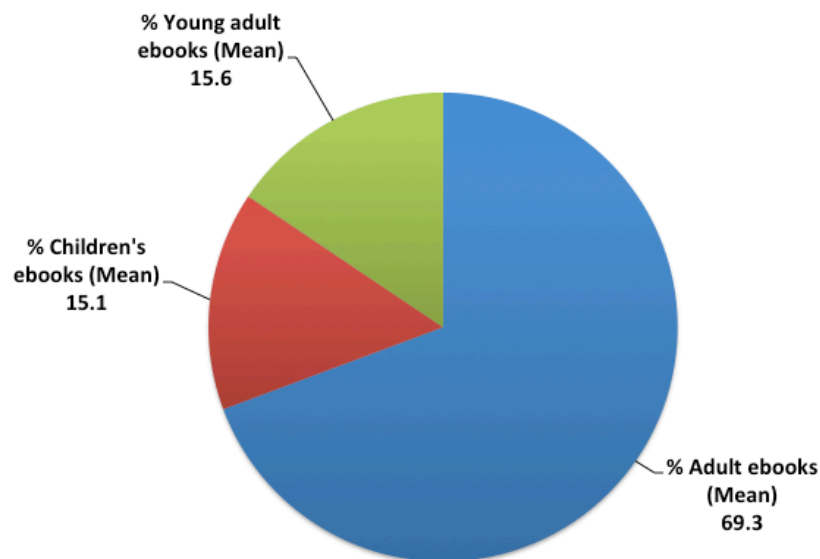
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Ebooks								
2015								
Fiction	74%	74%	76%	71%	75%	77%	69%	73%
Nonfiction	26%	26%	24%	30%	25%	23%	31%	27%
2014								
Fiction	75%	75%	74%	73%	75%	74%	73%	75%
Nonfiction	25%	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								
2015								
Fiction	65%	55%	55%	53%	58%	58%	56%	58%
Nonfiction	35%	45%	45%	47%	42%	42%	44%	42%
2014								
Fiction	63%	56%	55%	52%	56%	57%	53%	61%
Nonfiction	37%	44%	45%	48%	44%	43%	47%	39%

Adult vs. Children vs. YA Titles

We saw earlier that demand for adult ebooks was far ahead of demand for young adult or children's ebooks, and as a result, adult ebooks account for the majority of libraries' holdings—69.3% of ebooks, on average, are adult titles, compared to 15.6% that are young adult titles, and 15.1% that are children's titles. This is not an appreciable difference from last year, when adult titles accounted for 71% of public libraries' collections, children's books accounted for 15%, and young adult ebooks accounted for 14%.

We did not ask for a breakdown of print books for comparison in this year's Ebook Survey, but the 2014 *Library Journal* Materials Survey⁶ found that spending on print books broke down to 59% on adult titles, 30% on children's, and 11% on young adult titles. We can gather from this that children's collections comprise a greater percentage of print collections.

Figure 26. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library.
mean % each, all of public libraries, 2015



Larger libraries tend to have a somewhat higher percentage of adult titles than smaller libraries, while smaller libraries have more young adult titles. Children's ebooks are fairly consistent across all library size categories.

⁶ *Library Journal* Materials Survey 2014, <http://reviews.libraryjournal.com/2015/03/lj-in-print/materials-breakout-materials-survey-2015/>.

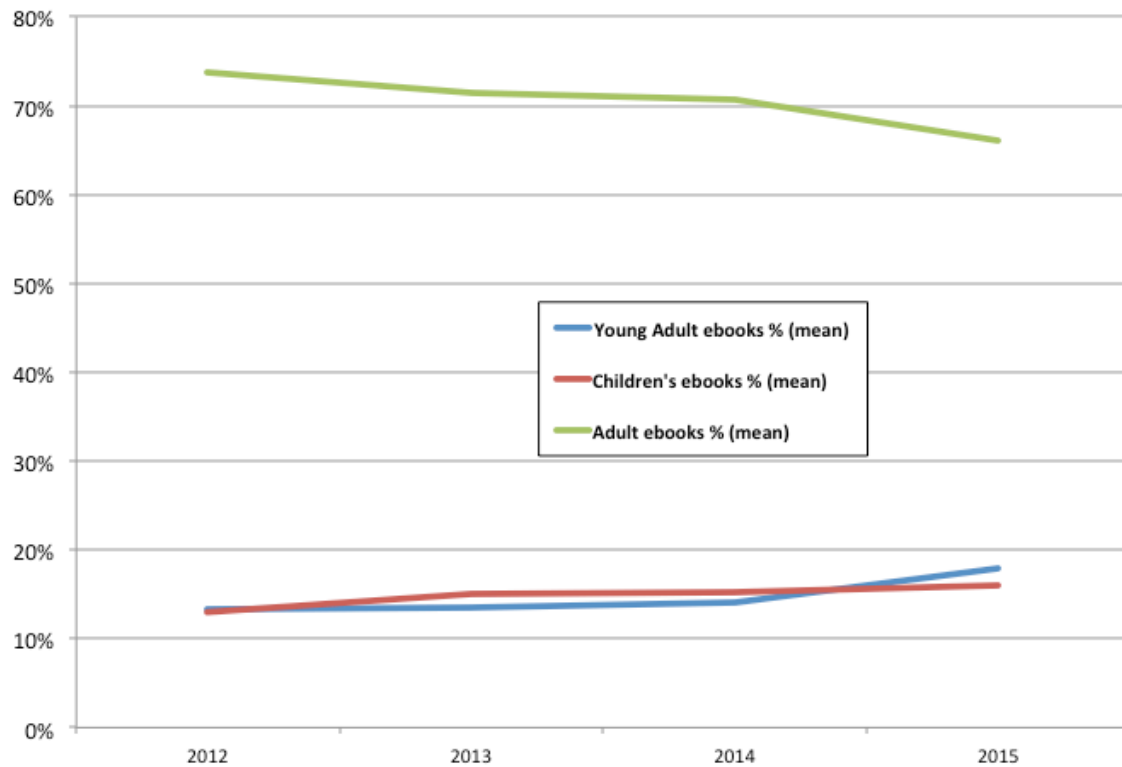
Table 16. Please approximate the breakdown of adult versus children's versus young adult ebooks available in your library.

% of each, public libraries by population served and geographical region, 2012–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Adult ebooks (mean)	66%	70%	71%	73%	68%	71%	68%	69%
Children's ebooks (mean)	16%	15%	14%	16%	16%	15%	12%	16%
Young adult ebooks (mean)	18%	15%	15%	11%	17%	14%	20%	15%
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%

Since 2012, the number of young adult titles has ticked up in public libraries overall, while adult ebooks have declined accordingly.

**Figure 27. Change in young adult, children's, and adult ebooks (means)
% of each, all public libraries, 2012–2015**

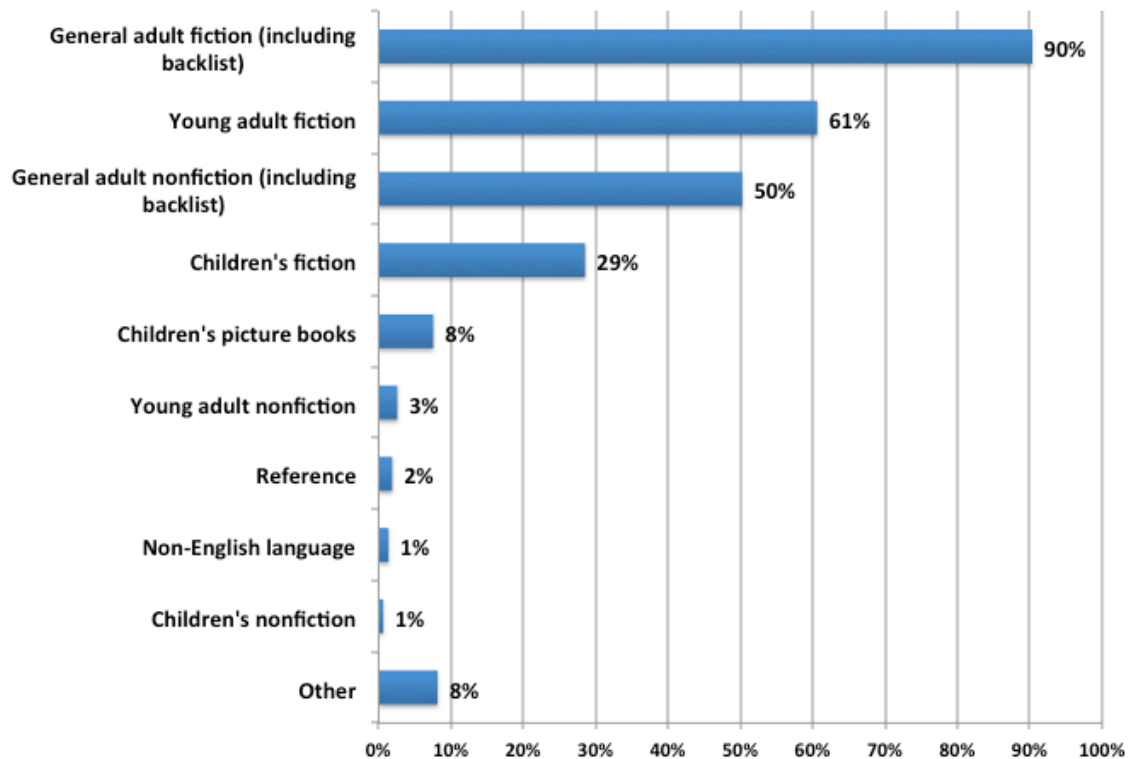


In-Demand Ebook Genres

In this survey, we changed how we ask about specific genres or categories of ebooks. The phrasing this time is “what three categories of ebooks have experienced the greatest increase in usage in the past year?” The top response was “general adult fiction,” selected by 90% of respondents. A distant number two was “young adult fiction,” selected by 61%.

Figure 28. Which three categories of ebooks have experienced the greatest increase in usage in the last year?

% of public libraries, 2015



“General adult fiction” is less popular in the West (75%) compared to other regions, while “young adult fiction” (70%), “children’s fiction” (36%) and “children’s picture books” (17%) are especially popular in the Midwest.

Table 17. Which three categories of ebooks have experienced the greatest increase in usage in the last year?

% of public libraries by population served and geographical region, 2015

	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)	86%	90%	93%	93%	96%	94%	75%	90%
Young adult fiction	47%	66%	68%	71%	70%	54%	57%	62%
General adult nonfiction (including backlist)	41%	54%	57%	64%	56%	49%	52%	48%
Children's fiction	22%	30%	30%	29%	36%	26%	15%	31%
Children's picture books	6%	8%	9%	14%	17%	4%	10%	5%
Young adult nonfiction	2%	2%	5%	0%	0%	2%	5%	3%
Reference	0%	5%	0%	0%	0%	1%	0%	4%
Non-English language	0%	2%	2%	0%	0%	0%	0%	3%
Children's nonfiction	0%	0%	2%	0%	0%	2%	0%	0%
Other	14%	10%	2%	0%	2%	10%	20%	6%

Non-English Ebooks

A new question we added to the 2015 survey asked about whether libraries carry non-English ebooks, and the response was virtually a 50:50 split, with slightly less than half (46%) carrying non-English language ebooks. Spanish was by far the language that libraries were likely to offer, with Chinese a distant second.

Figure 29. Do you carry ebooks in languages other than English?
% of public libraries, 2015

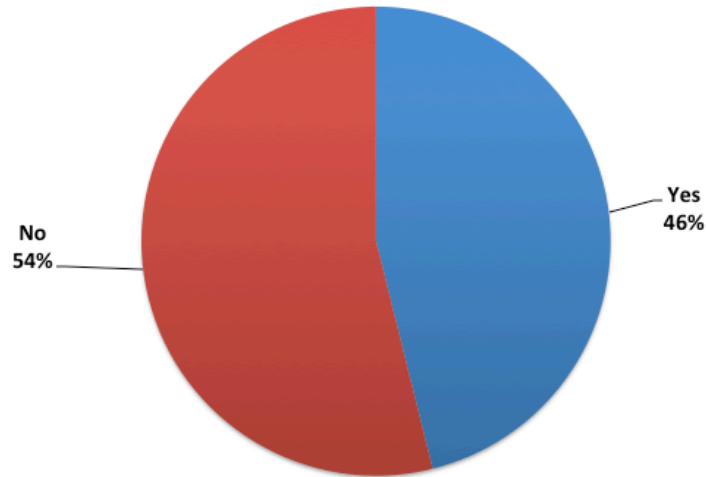
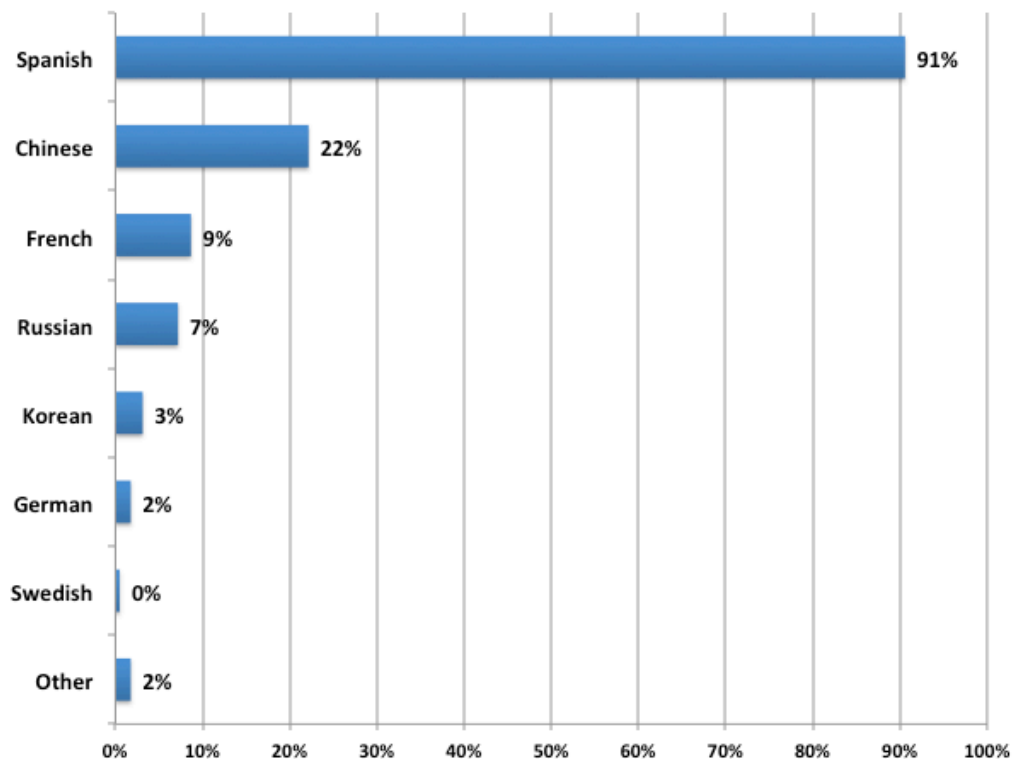


Figure 30. If yes, in which languages?
% of public libraries that offer non-English ebooks, 2015



Asked why libraries did not offer non-English ebooks, the top response, selected by 53% of libraries, was that they are “not needed.” The number two response, the write-in “little or no demand,” is virtually the same thing.

Figure 31. If you do not carry ebooks in languages other than English, why not?
% of public libraries that do not offer non-English ebooks, 2015

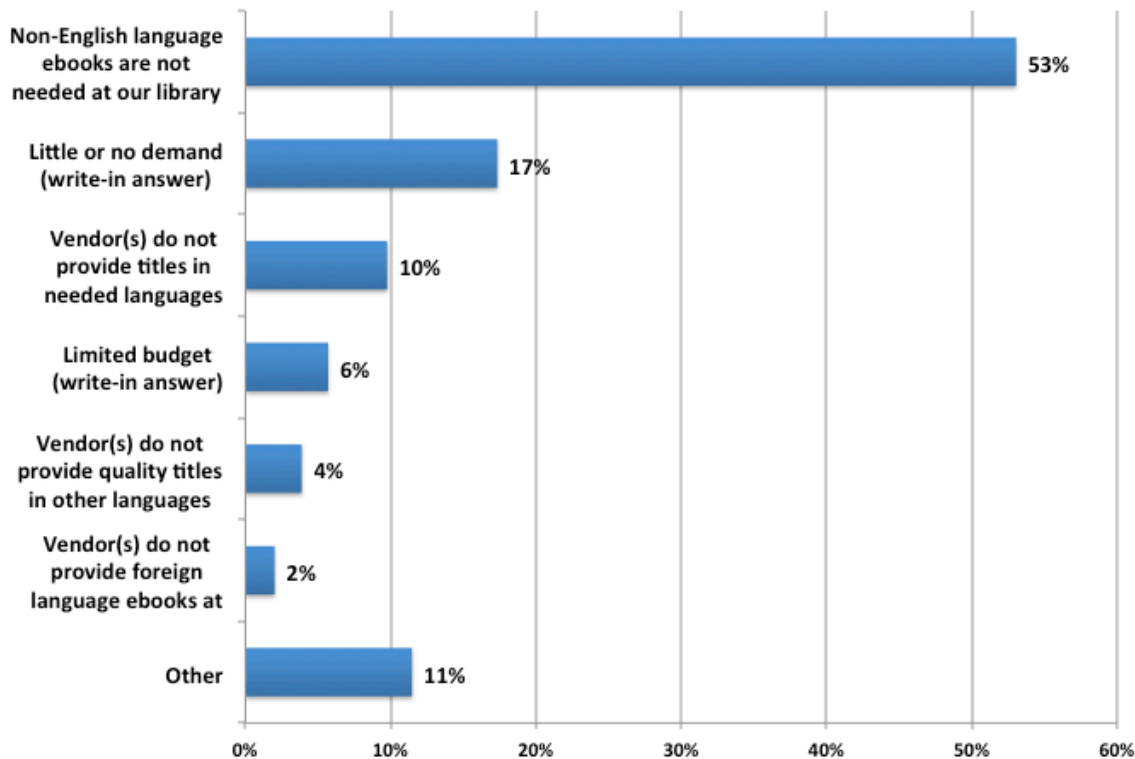


Table 18. Do you carry ebooks in languages other than English?
% of public libraries by population served and geographical region, 2015

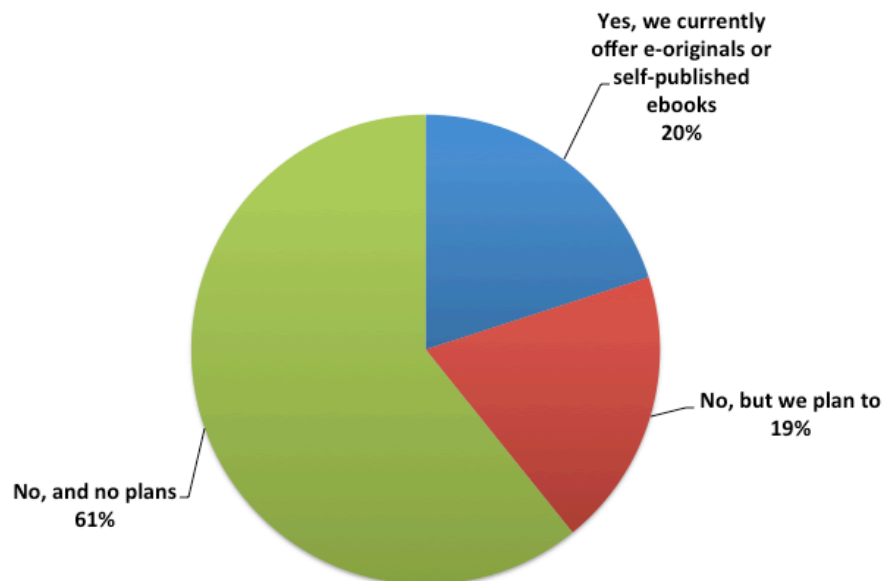
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	29%	53%	51%	71%	49%	43%	70%	39%
No	71%	47%	49%	29%	51%	57%	30%	61%
<i>If Yes, in which languages?</i>								
Spanish	86%	84%	100%	100%	100%	65%	100%	100%
Chinese	14%	22%	22%	40%	13%	37%	12%	22%
French	14%	13%	4%	20%	4%	12%	3%	12%
Russian	7%	9%	0%	20%	0%	13%	0%	11%
Korean	0%	9%	0%	10%	4%	0%	3%	5%
German	0%	6%	0%	0%	4%	0%	0%	3%
Swedish	0%	0%	0%	10%	0%	2%	0%	0%
Other	0%	6%	0%	0%	4%	0%	0%	3%
<i>If not, why not?</i>								
Non-English language ebooks are not needed at our library	60%	56%	45%	0%	47%	49%	33%	61%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Little or no demand (write-in answer)	14%	15%	25%	0%	36%	15%	33%	11%
Vendor(s) do not provide titles in needed languages	6%	7%	10%	33%	0%	12%	0%	13%
Limited budget (write-in answer)	6%	7%	5%	33%	5%	8%	17%	3%
Vendor(s) do not provide quality titles in other languages	3%	4%	5%	0%	0%	9%	0%	2%
Vendor(s) do not provide foreign language ebooks at all	3%	4%	0%	0%	5%	0%	0%	3%
Other	11%	11%	15%	33%	11%	13%	17%	10%

Self-Published Ebooks

In publishing in general, new technologies, both print- and ebook-related, have made it easier and less expensive than ever for authors to self-publish their own books. Once considered “vanity” publishing, self-publishing still has a bit of a stigma attached to it, but is becoming more and more accepted. That said, do public libraries purchase or license self-published ebooks? Alas, for would-be authors out there, only 20% say that they do, while 61% do not and have no plans to.

Figure 32. Does your library purchase and/or license ebook originals or self-published ebooks?
% of public libraries, 2015



There is a great deal of variation when we look at library size; only 3% of the smallest libraries offer e-originals or self-published ebooks, compared to 70% of the largest libraries.

Table 19. Does your library purchase and/or license ebook originals or self-published ebooks?
% of public libraries by population served and geographical region, 2015

	<i>Population Served</i>				<i>Geographical Region</i>			
	<i>< 25,000</i>	<i>25,000-99,000</i>	<i>100,000-499,000</i>	<i>500,000+</i>	<i>Midwest</i>	<i>North-east</i>	<i>West</i>	<i>South</i>
Yes, we currently offer e-originals or self-published ebooks	3%	9%	36%	70%	33%	10%	16%	23%
No, but we plan to	18%	25%	15%	20%	14%	16%	26%	22%
No, and no plans	79%	66%	48%	10%	53%	74%	58%	55%

Why don't libraries offer self-published ebooks? A combination of concerns about review sources, dubious quality, as well as logistics. The top response was "no reliable reviews are available," followed by "no time to read and evaluate." Three out of ten said "content is poor quality," and one-fourth said "we are interested in self-published ebooks, but not sure how to host them."

Figure 33. If no, why do you not offer ebook originals/self-published ebooks?
% of public libraries to do not offer self-published ebooks, 2015

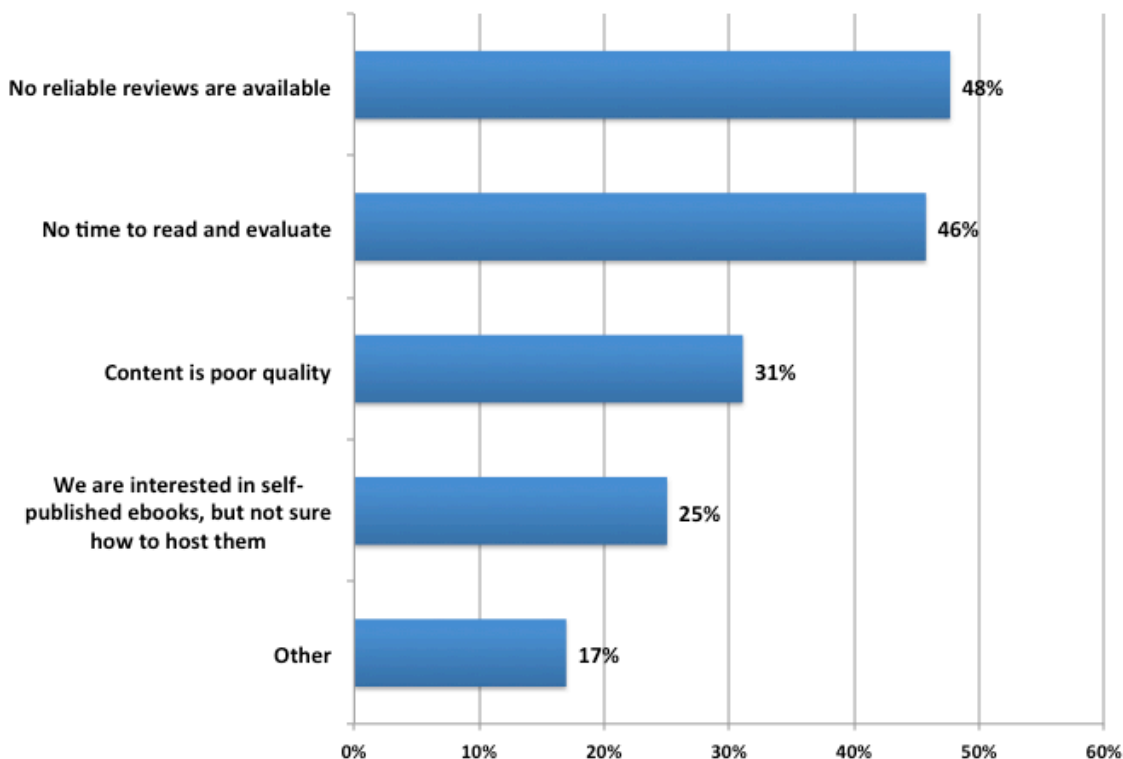


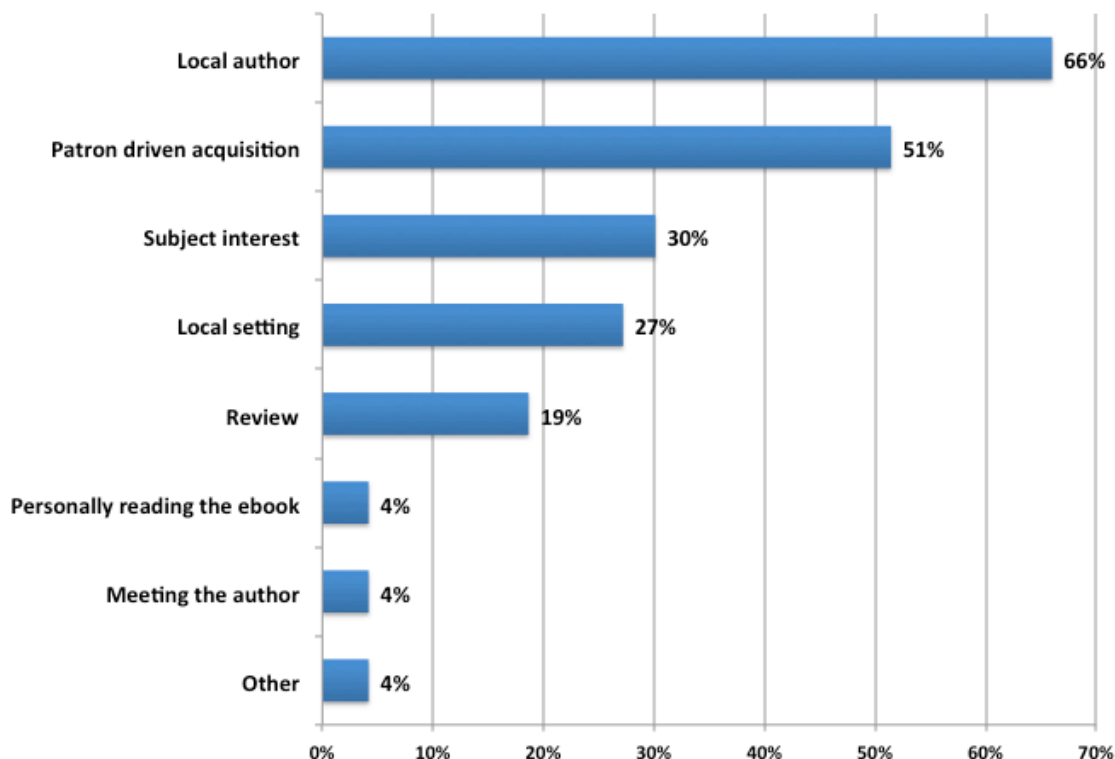
Table 20. If no, why do you not offer ebook originals/self-published ebooks?

% of public libraries that do not offer self-published ebooks, by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No reliable reviews are available	37%	52%	56%	0%	51%	48%	47%	46%
No time to read and evaluate	48%	34%	56%	100%	53%	45%	46%	43%
Content is poor quality	15%	41%	44%	100%	41%	21%	30%	37%
We are interested in self-published ebooks, but not sure how to host them	22%	34%	19%	0%	62%	19%	18%	17%
Other	22%	10%	19%	0%	15%	11%	23%	22%

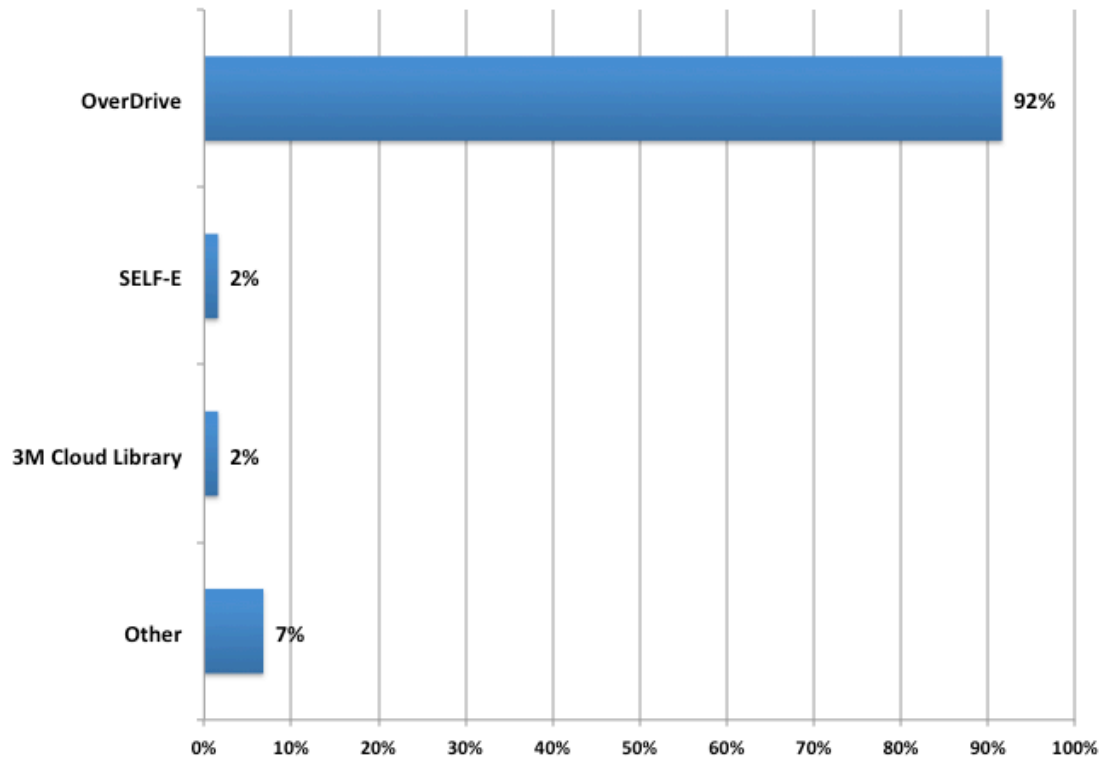
Among those libraries that do offer self-published ebooks, the decision to carry a given title is generally because an author is local (66%) and/or that the offering was a patron-driven acquisition (51%).

Figure 34. If yes, what triggers your decision to carry a self-published ebook or ebook original?
% of public libraries, 2015



As for the logistics involved in offering self-published ebooks, OverDrive is overwhelmingly the platform that libraries use to host them.

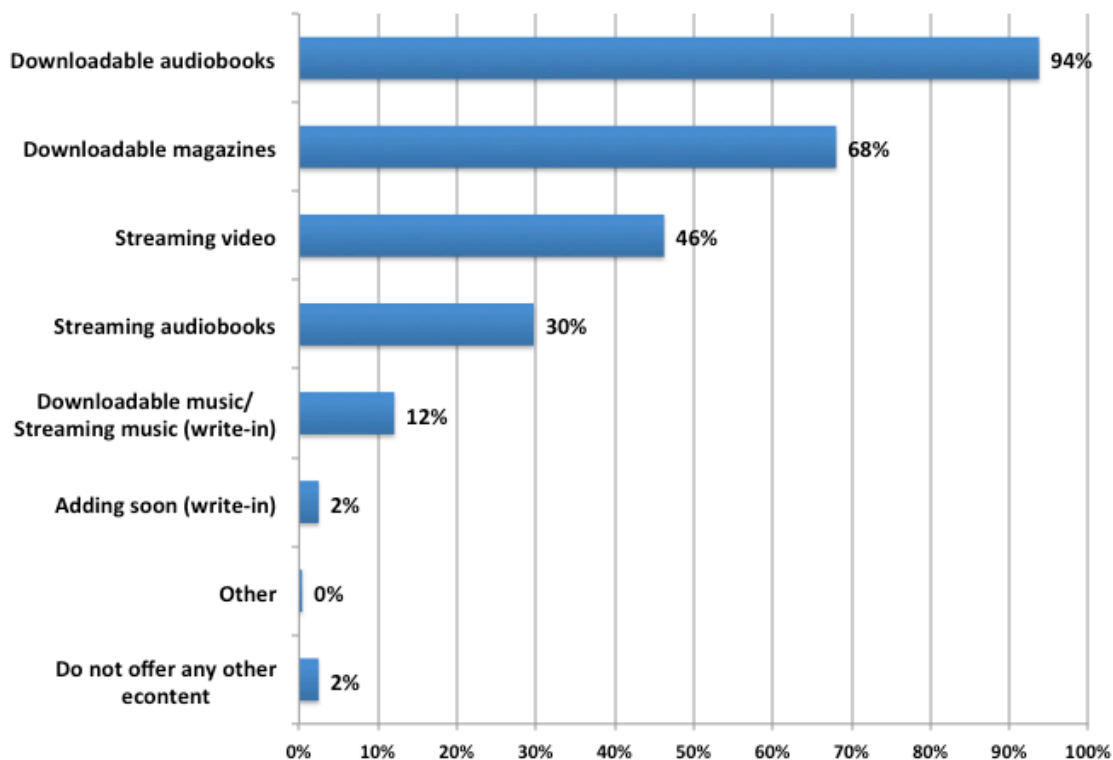
Figure 35. If yes, what platform(s) do you use for self-published ebooks?
% of public libraries, 2015



Other Econtent

We remarked in previous editions of this study that libraries were not just repositories for books, p- or e-, but all sorts of media content. This is not new, even as far back as the 1970s and 80s, public libraries used to lend vinyl records, and later VHS tapes, adding CDs, DVDs, audiobooks (on CD and MP3), and other media content as formats have changed and emerged. So a new question we added to this survey asked about other kinds of electronic content, and virtually all public libraries that offer ebooks also offer downloadable audiobooks (94%), while about two-thirds (68%) offer downloadable magazines.

**Figure 36. In addition to ebooks, does your library offer any of the following econtent?
% of public libraries, 2015**



The ability to offer these items varies by size of library, as it is often a question of having the resources required to offer them, such as servers, network and WiFi infrastructure, and staff who can maintain these services as well as offer tech support to library users. But even 88% of the smallest libraries are able to offer downloadable audiobooks, although they were the only size category to say that they do not offer any other econtent.

Table 21. In addition to ebooks, does your library offer any of the following econtent?
% of public libraries by population served and geographical region, 2015

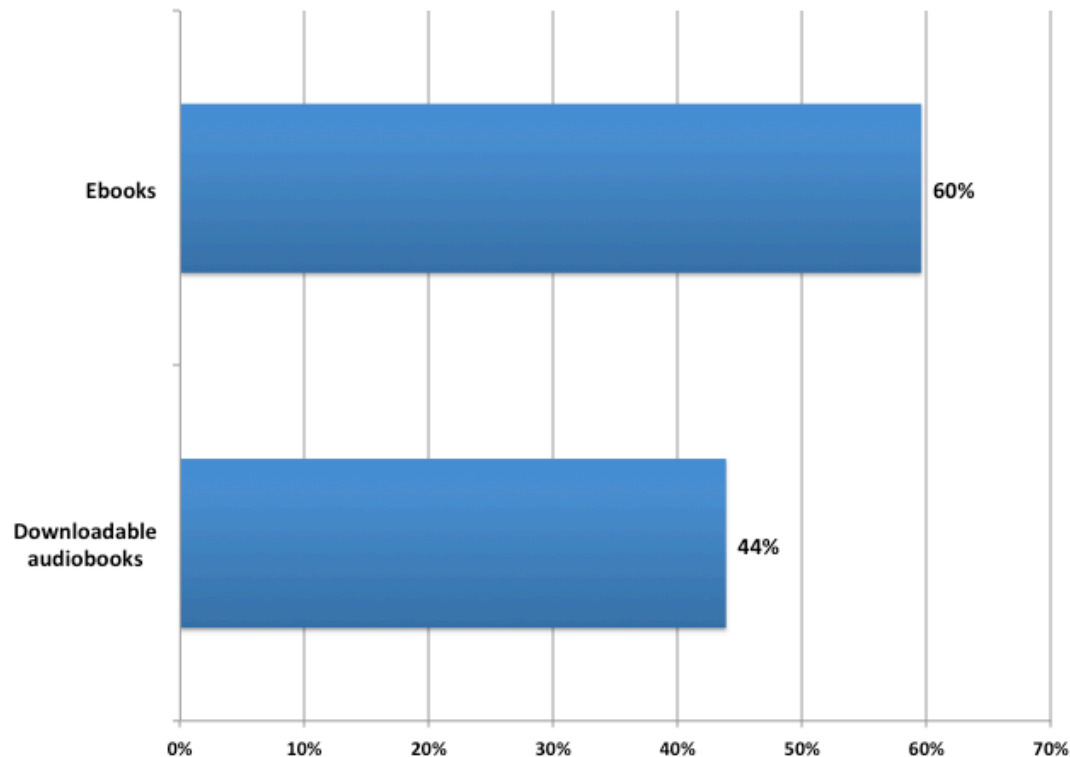
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Downloadable audiobooks	88%	100%	91%	100%	93%	91%	90%	97%
Downloadable magazines	51%	68%	78%	93%	71%	62%	72%	70%
Streaming video	24%	58%	42%	86%	43%	36%	47%	54%
Streaming audiobooks	10%	37%	31%	64%	37%	20%	23%	36%
Downloadable music/Streaming music (write-in answer)	4%	10%	18%	29%	15%	7%	17%	13%
Adding soon (write-in answer)	2%	2%	4%	7%	3%	4%	0%	2%
Other	0%	2%	0%	0%	2%	0%	0%	0%
Do not offer any other econtent	8%	0%	0%	0%	0%	2%	5%	3%

Growing Econtent

Of ebooks and downloadable audiobooks, which is gaining in popularity faster? The answer is ebooks, selected by 60% of public libraries.

Figure 37. If yes, which econtent would you say is currently gaining in popularity the fastest at your library?

% of public libraries, 2015



Even in the smallest libraries, ebooks are growing in popularity faster than downloadable audiobooks. Curiously, in the 100,000 to 499,000 population served range (and in the West), downloadable audiobooks are growing in popularity faster than ebooks.

Table 22. If yes, which econtent would you say is currently gaining in popularity the fastest at your library?

% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Ebooks	69%	65%	47%	71%	50%	76%	41%	58%
Downloadable audiobooks	36%	39%	58%	29%	58%	27%	65%	43%

Patron Recommendations

Generally, library patrons are able to make recommendations of ebooks for the library to purchase; 44% allow it on the ebook platform itself, 40% allow it on the library's website, and 27% have a physical form in the library. Nineteen percent say they have no "official" process in place, but chances are most patrons can request ebooks in person or email the library with their title recommendations.

Figure 38. Is there a process in place for patrons to make ebook title recommendations for library purchase?

% of public libraries, 2015

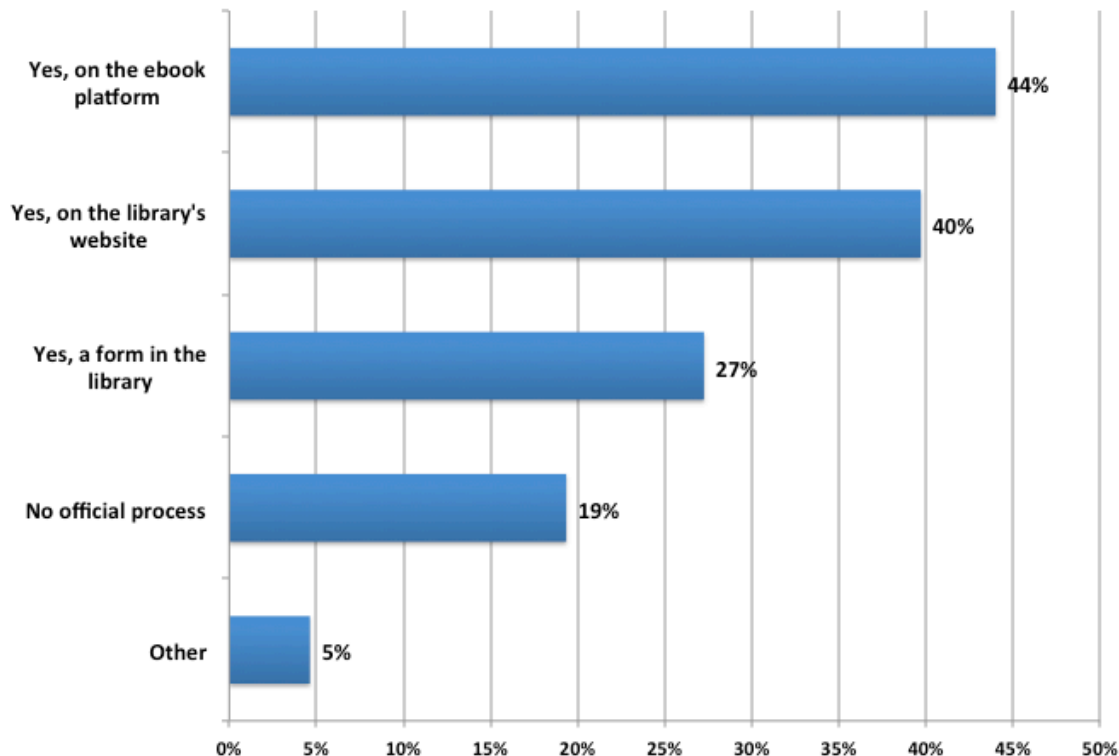


Table 23. Is there a process in place for patrons to make ebook title recommendations for library purchase?

% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET YES	57%	82%	91%	100%	85%	74%	80%	79%
Yes, on the ebook platform	31%	50%	49%	57%	33%	48%	30%	51%
Yes, on the library's website	20%	32%	60%	79%	47%	23%	61%	42%
Yes, a form in the library	18%	32%	38%	7%	36%	23%	26%	26%
No official process	41%	15%	9%	0%	9%	26%	15%	21%
Other	4%	10%	0%	0%	8%	3%	5%	4%

Reordering Ebooks

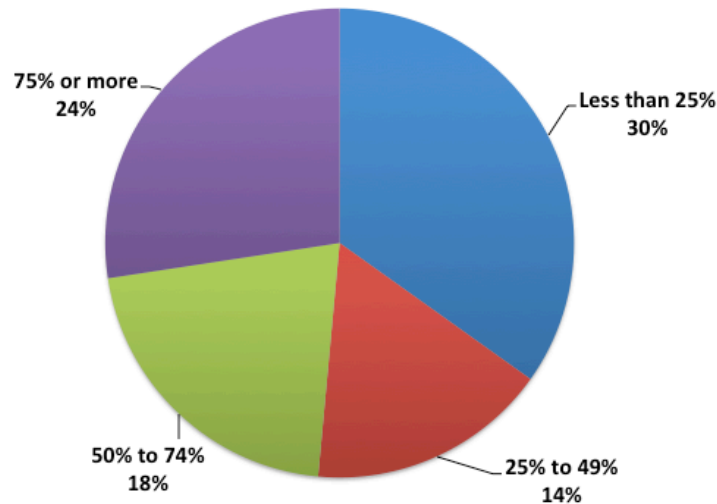
Another new question we added to this survey asked about the percentage of ebooks that get reordered when their license expires. Only about one-third of ebook titles (37.6% mean, 30.0% median) do in fact get reordered.

Figure 39. What percentage of your licensed ebooks would you estimate get reordered when their license expires?

% of public libraries, 2015

Mean: 37.6%

Median: 30.0%



The likelihood of a title getting reordered increases with library size. Again, it's a question of resources and smaller libraries have fewer of them.

Table 24. What percentage of your licensed ebooks would you estimate get reordered when their license expires?

% of public libraries by population served and geographical region, 2015

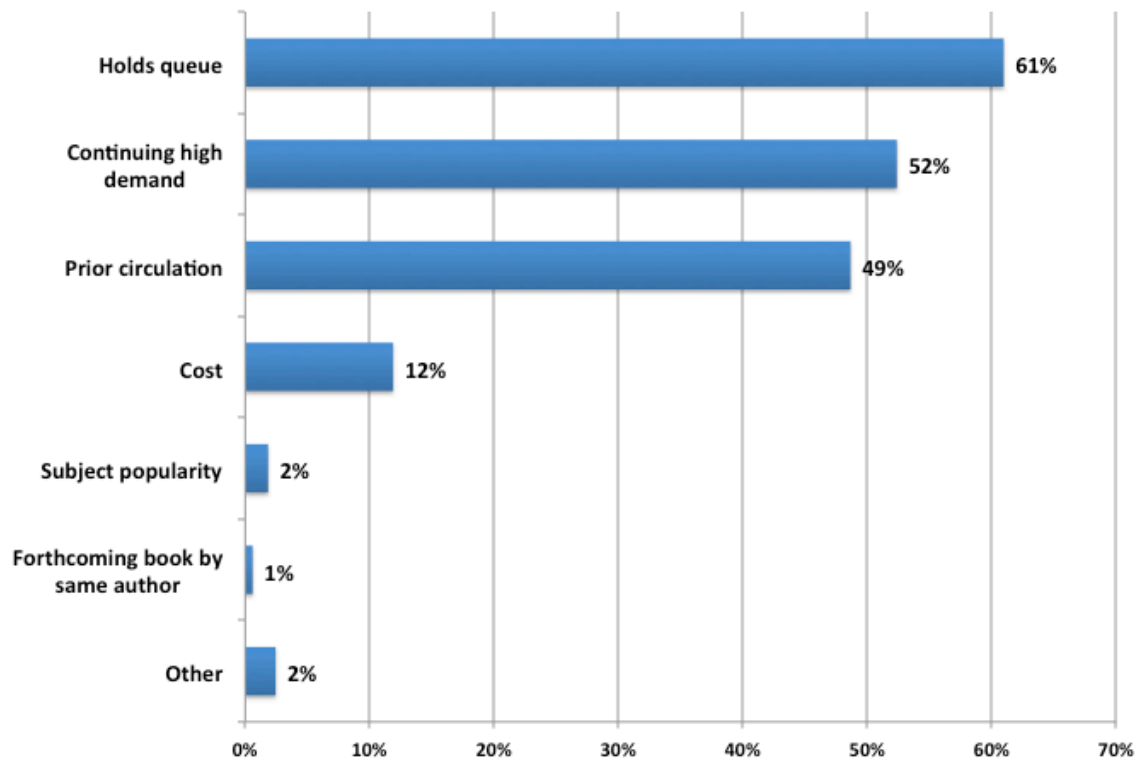
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Less than 25%	38%	43%	17%	10%	14%	38%	40%	30%
25% to 49%	8%	16%	17%	0%	11%	16%	9%	17%
50% to 74%	13%	22%	10%	50%	17%	23%	30%	12%
75% or more	13%	8%	50%	40%	38%	6%	21%	30%
Mean %	23.6	26.9	55.6	64.0	46.9	24.4	42.9	40.8
Median %	10.0	20.0	72.5	62.5	50.0	10.0	50.0	30.0

Renewal Decisions

What affects the decision to reorder a title that has expired? Essentially, demand, and all the ways it is gauged: the holds queue (61%), continuing high demand (52%), and prior circulation (49%). Cost (12%) is less of a factor.

Figure 40. When a license period is over, what is most influential on your decision to renew an electronic title?

% of public libraries, 2015



As might be expected, cost is a far greater concern for the smallest of libraries (26%) than for all other size categories, which are in single digits.

Table 25. When a license period is over, what is most influential on your decision to renew an electronic title?

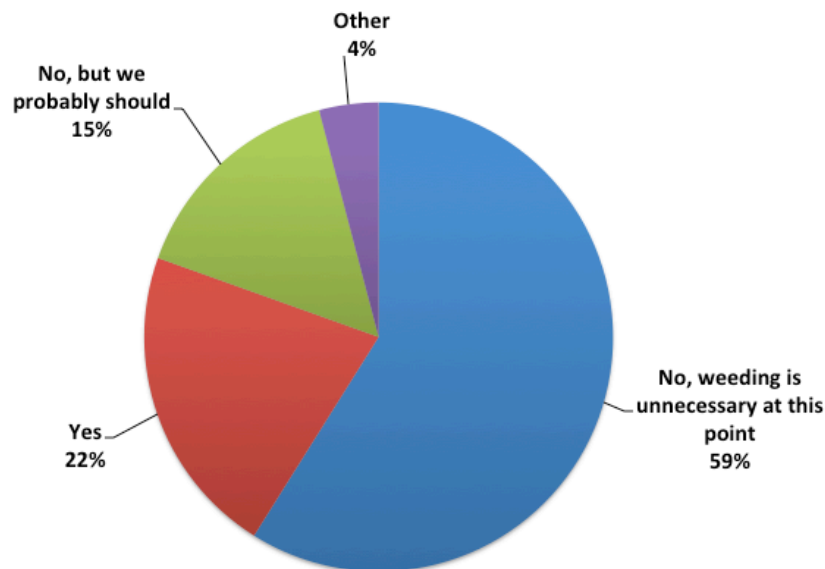
% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Holds queue	55%	67%	61%	90%	48%	61%	62%	67%
Continuing high demand	48%	60%	39%	40%	53%	50%	52%	54%
Prior circulation	35%	42%	70%	60%	56%	41%	49%	51%
Cost	26%	7%	9%	0%	11%	15%	13%	9%
Subject popularity	3%	0%	3%	0%	0%	0%	0%	5%
Forthcoming book by same author	0%	2%	0%	0%	0%	2%	0%	0%
Other	0%	2%	6%	0%	8%	3%	0%	0%

Weeding the Collection

Just under one-fourth of public libraries (22%) say they have ever weeded their ebook collections, but 59% say that weeding is unnecessary (they can simply not renew/reorder a title after the license expires). Still, 15% said they probably should.

Figure 41. Have you ever weeded your ebook collection?
% of public libraries, 2015



Weeding ebooks is not as necessary as weeding print books, which take up a considerable amount of physical space. However, some reasons to do so may be to de-clutter catalog discovery or to eliminate out-of-date information. It may also be done to reduce costs, for instance to stop paying for non-circulating items that are licensed in a pay-for-time model. Libraries may also need to free up server storage space (if a library's ebooks are self-hosted).

The largest libraries are most likely to weed their collections, as they are likely to have ebooks from a variety of vendors and on a variety of platforms.

Table 26. Have you ever weeded your ebook collection?
% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
No, weeding is unnecessary at this point	77%	61%	52%	20%	54%	70%	52%	55%
Yes	6%	20%	27%	60%	27%	17%	20%	22%
No, but we probably should	9%	16%	21%	10%	14%	9%	21%	19%
Other	9%	2%	0%	10%	5%	3%	7%	3%

In Summary

Public libraries' ebook collections are predominantly fiction-based (75:25 ratio), while their print collections are more evenly split. Their collections are also predominantly adult-based, with some modest increases in young adult ebook titles, and, to a lesser extent, children's books this year.

Non-English ebooks are offered by about half of libraries, with lack of demand named as the predominant reason for not acquiring them.

Twenty percent of libraries make self-published ebooks available and survey respondents reported that OverDrive is the most common platform used for them. Another 19% of libraries plan to offer self-published ebooks in the future. The primary reasons for not offering self-published ebooks are a combination of concerns about lack of review sources and book quality, as well as logistics.

There is still a stigma attached to self-publishing, and it remains conflated with the notion of vanity publishing, with the very real concern being that the quality is not there. That may or may not be the case; there are legitimate reasons for authors to prefer self-publishing⁷ and it shouldn't be automatically assumed that just because something is self-published means that it was "too wretched" to be published by a professional publishing house. Still, the perception remains, but we found that libraries will make an exception where a local author is concerned, or a patron makes an acquisition request.

Libraries are about more than offering books, they're about offering centralized access to a variety of media as well, both analog and digital. Where once libraries loaned out vinyl records and VHS tapes, now they offer audiobooks, on CD as well as downloadable, emagazines, DVDs, streaming video, and more—including ebooks. Patrons have a wide variety of media preferences, and public libraries continue to do what they can to accommodate all of these preferences. However, that takes money and resources, which can be in short supply.

In Their Own Words

We asked our survey respondents what subjects they were buying fewer print versions of because of ebooks. Here is a sampling of the responses:

- *"Advanced level computer and mobile device subjects."*
- *"Buying fewer copies of fiction titles."*
- *"Buying much less print reference."*
- *"Commonly stolen items."*

⁷ Bestselling marketing guru Seth Godin famously decided to go the self-publishing route, frustrated by the long lead times required by the schedules of publishing houses, making his books out of date by the time they appeared. He eventually gave up self-publishing, but he is an example of how poor quality isn't an inherent aspect of self-published books.

- *"We've decreased the overall line, this spread the pain evenly."*
- *"I purchase less fiction—I purchase three ebooks a month."*
- *"Increased erotica and romance."*
- *"Mainly romance, some history, fewer copies of popular fiction."*
- *"Reference materials."*
- *"Reference. Buying ebook versions instead."*
- *"Stealable nonfiction."*
- *"We buy slightly fewer print books, but mostly, if we find patrons who read a certain author or subject prefer ebooks, we tend to purchase these only in that format. We also find that with more ebooks available and accessible to our patrons, there is less of a need to purchase print reference titles."*
- *"We can buy fewer erotic fiction print titles."*

3. USERS AND USABILITY

In this chapter, we will look at some of the usability issues with regard to ebooks and ebook collections. What keeps patrons from accessing the library's ebooks? What other usability issues do patrons and librarians have?

OPAC Discoverability

Over the past three surveys, ebooks have been increasingly discoverable through the library's general online public access catalog (OPAC). With 75% citing OPAC discoverability in 2013, it is up to 90% in 2015.

Figure 42. Are ebooks discoverable through your library's general OPAC?
% of public libraries, 2013–2015

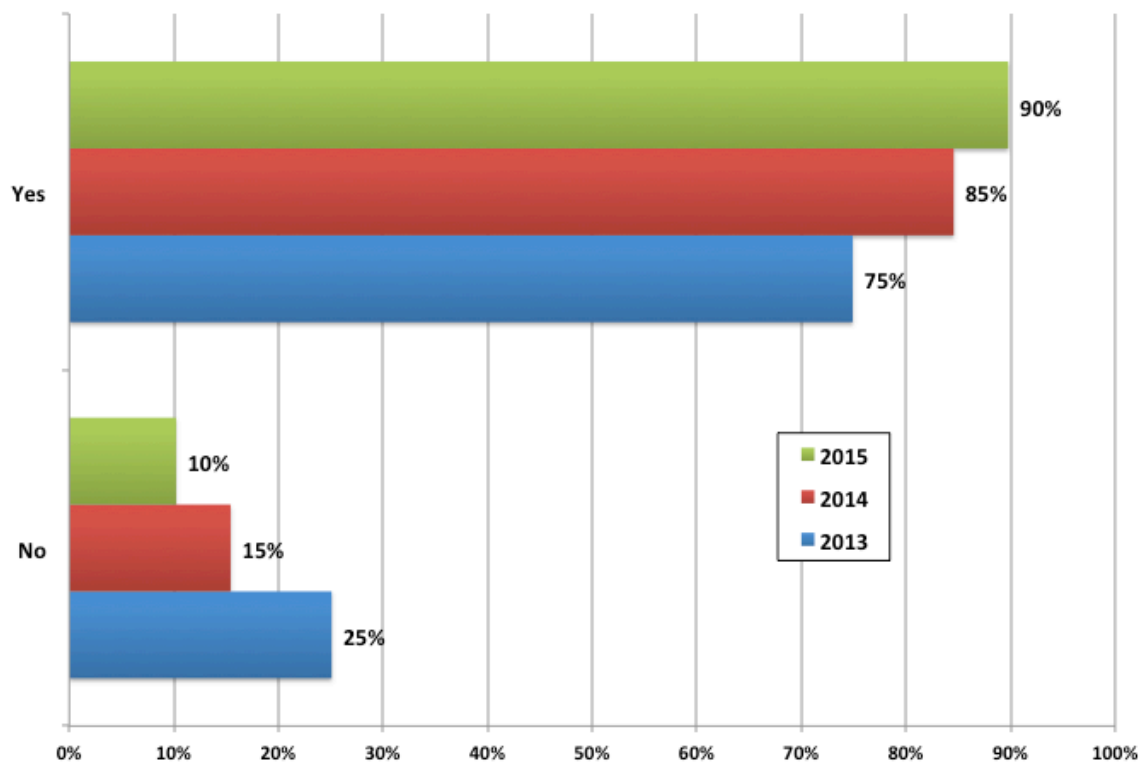


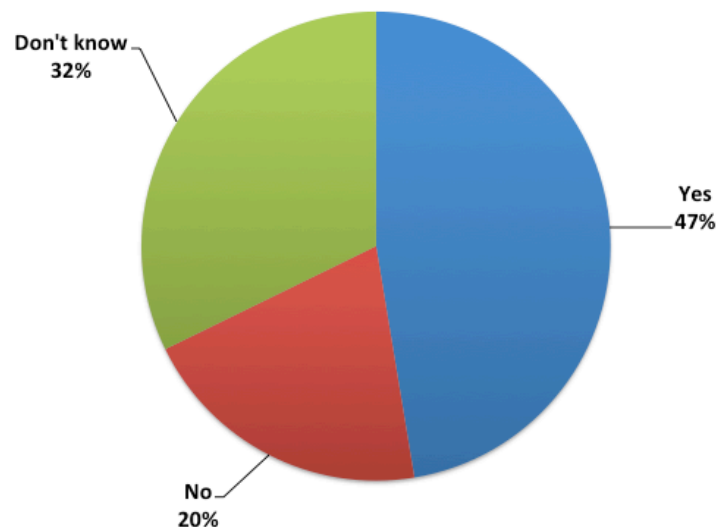
Table 27. Are ebooks discoverable through your library's general OPAC?
% of public libraries by population served and geographic region, 2013–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Yes	80%	92%	93%	100%	88%	94%	82%	90%
No	20%	8%	7%	0%	12%	6%	18%	10%
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%

Accuracy of Vendor-Supplied Metadata

When library users search for ebooks based on criteria beyond the title and author, often they are reliant on the metadata tags that the vendor has added to the ebook file. But are those tags accurate and comprehensive enough to allow users to find the books they are looking for? According to a new question we added in this year's survey, to an extent; 47% of respondents in fact say that vendor-supplied metadata tags are accurate, although one-third don't know.

Figure 43. Do you find that vendor-supplied metadata is accurate and comprehensive enough to aid in ebook selection and discovery?
% of public libraries, 2015



Forty-three percent of larger libraries (serving a population of 500,000+) reported that their vendor-supplied metadata is insufficient.

Table 28. Do you find that vendor-supplied metadata is accurate and comprehensive enough to aid in ebook selection and discovery?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	51%	49%	42%	43%	48%	46%	32%	53%
No	12%	15%	31%	43%	24%	18%	17%	22%
Don't know	37%	36%	27%	14%	28%	36%	51%	26%

What metadata elements are deficient? We asked respondents to write in comments on “mudding metadata.” Generally, categories, subject headings, and descriptions are found wanting, consistency is an issue, and data don’t conform to standard cataloguing. Some specific comments:

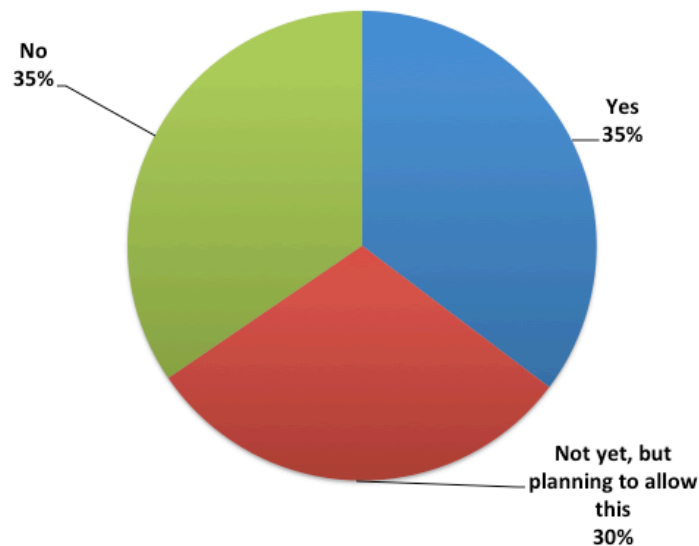
- *“Inconsistent titles, authors, and series names.”*
- *“Local keywords, descriptions must be cleaned up, subject headings inaccurate, author names are transposed.”*
- *“Lots of the MARC data is sloppy or titles are incorrect.”*
- *“Many records come in from the vendor missing a good portion of the information. Many are unfinished records and are missing most of the encoding.”*
- *“Not as detailed or accurate as records for print books, especially subjects and genres.”*
- *“Metadata is sometimes only the ISBN.”*
- *“The MARC leader fields tend to contain wrong coding which results in wrong format projection in our Polaris OPAC. They also tend to not have alternate titles, poor subject field choices, and inaccurate or missing author/series information.”*
- *“Youth subject headings are often incorrect.”*

Catalog Integrated with Ebook Provider's Site

One-third of libraries' online catalogs are integrated with their ebook provider's own site (via API—Application Program Interface—protocols) which allows users to checkout ebooks directly from the library's OPAC rather than using additional steps. Another 35% do not have their OPAC integrated with their ebook provider's site although 30% plan to integrate in the future.

Figure 44. Is your online catalog integrated with your ebook provider's site (API integration) to allow patrons to checkout ebook titles directly from the OPAC?

% of public libraries, 2015



Libraries in the South and Northeast were more likely to have API integration.

Table 29. Is your online catalog integrated with your ebook provider's site (API integration) to allow patrons to checkout ebook titles directly from the OPAC?

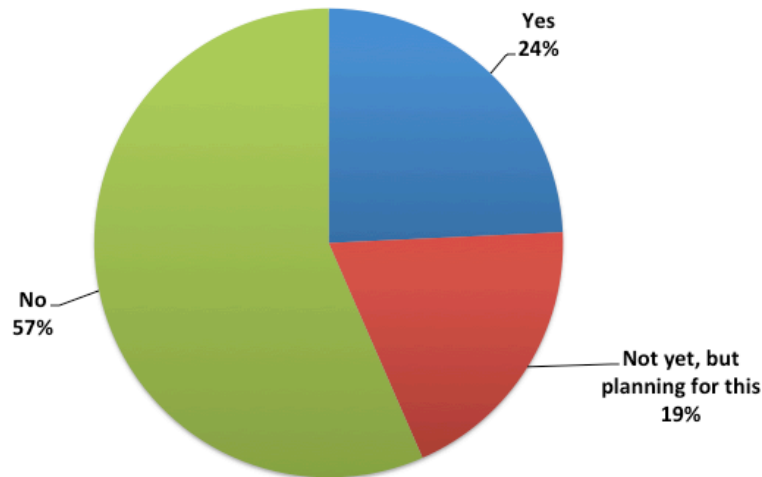
% of public libraries by population served and geographic region, 2015

	<i>Population Served</i>				<i>Geographical Region</i>			
	<i>< 25,000</i>	<i>25,000-99,000</i>	<i>100,000-499,000</i>	<i>500,000+</i>	<i>Midwest</i>	<i>North-east</i>	<i>West</i>	<i>South</i>
Yes	33%	43%	27%	36%	13%	33%	28%	50%
Not yet, but planning to allow this	29%	23%	39%	50%	37%	35%	28%	24%
No	39%	34%	34%	14%	51%	32%	44%	25%

Print and Ebook Checkout Histories

Almost six out of ten libraries (57%) do not allow patrons to view their print and ebook checkout histories in one place, although 19% plan to offer that in the future.

Figure 45. Are patrons able to view their print book and ebook checkout histories together?
% of public libraries, 2015



Again, respondents in the South and Northeast were most likely to have this capability. Libraries in the West are in the planning stages.

Table 30. Are patrons able to view their print book and ebook checkout histories together?
% of public libraries by population served and geographic region, 2015

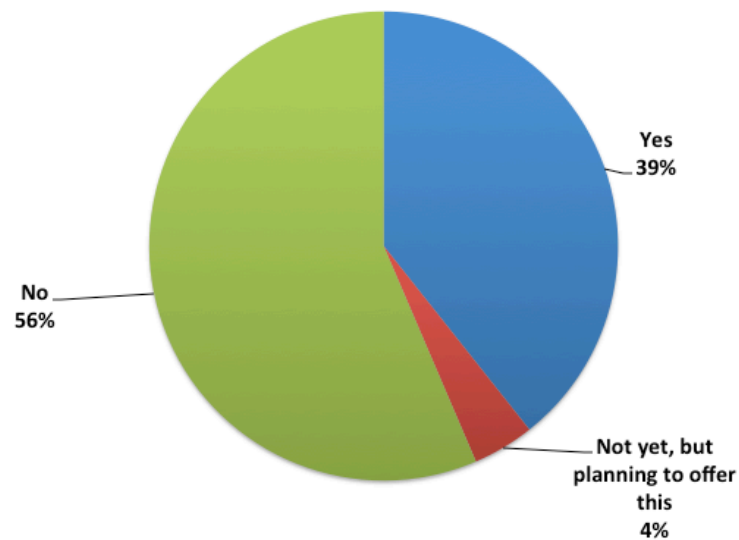
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	31%	20%	16%	36%	6%	28%	15%	33%
Not yet, but planning for this	10%	18%	31%	21%	19%	20%	29%	16%
No	58%	62%	53%	43%	75%	53%	56%	51%

The “Buy Now” Option

One recurring theme in virtually all of our past surveys is that patrons and librarians alike are frustrated with having to make patrons wait in a queue to borrow already-checked-out ebooks. As an alternative, do libraries offer patrons the ability to buy an ebook rather than wait for it? Almost six out of 10 (56%) say “no,” while 39% do offer this feature. Only 4% are planning to offer it.

Figure 46. Do you offer a “Buy Now” option as an alternative for patrons to purchase content rather than wait on a holds queue?

% of public libraries, 2015



Nearly three-quarters of the largest libraries already offer this feature (71%).

Table 31. Do you offer a "Buy Now" option as an alternative for patrons to purchase content rather than wait on a holds queue?

% of public libraries by population served and geographic region, 2015

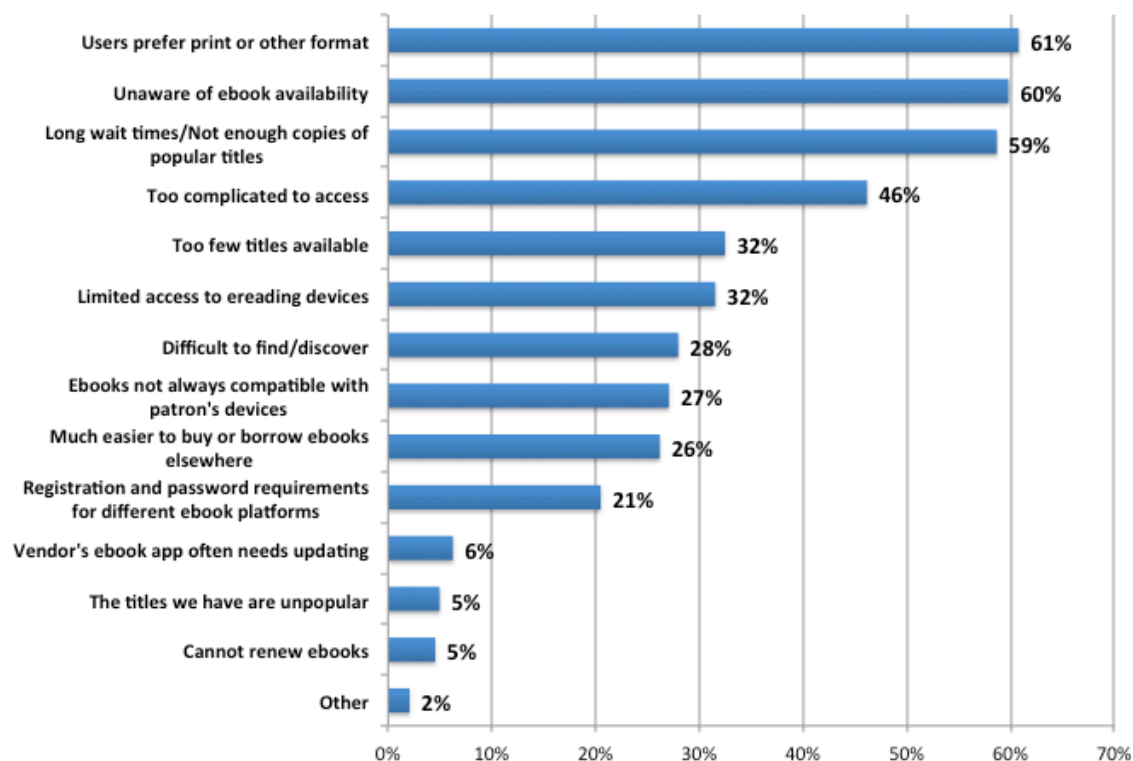
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	41%	29%	42%	71%	27%	45%	38%	41%
Not yet, but planning to offer this	4%	8%	2%	0%	2%	4%	0%	7%
No	55%	63%	56%	29%	71%	51%	62%	52%

Ereading Barriers

What, if anything, keeps library users from reading ebooks? In past surveys, ease of use issues were most likely, but this year, for the first time, “users prefer print or other format” has leapt to the top of the list, and is at an all-time high of 61%. A close second is “unaware of ebook availability” at 60% (down a couple of percentage points from last year), and a close third is “long wait times/not enough copies of popular titles” at 50%, up from last year but within its historical average range.

Note that the top item reads “users prefer print *or other format*.” In previous surveys, this had been phrased “users prefer print.” As you can see from the time series below, “users prefer print” had been rising for a couple surveys, but adding “or other format” seems to have goosed it a little bit. Audiobooks have been popular for a long time and given what we saw earlier about libraries offering and expanding their downloadable audiobook offerings, we shouldn’t automatically assume that print books are making a universal comeback.

Figure 47. What hinders the public from reading your library's ebook content?
% of public libraries, 2015



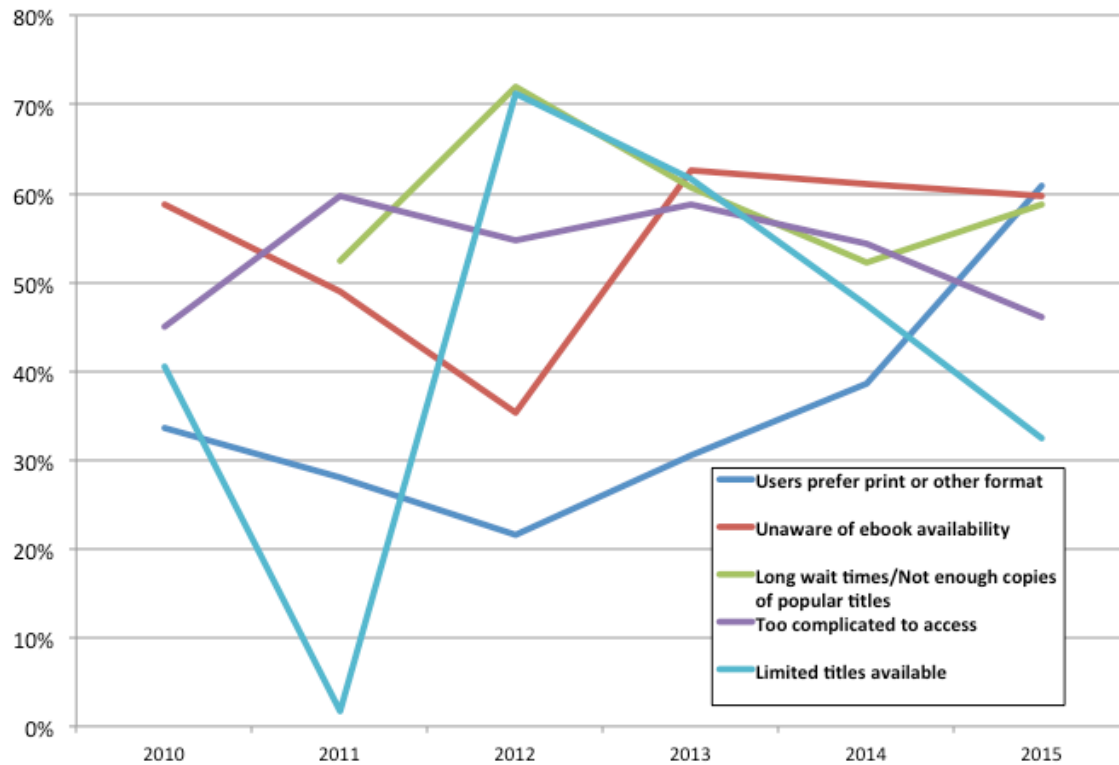
Smaller libraries still struggle with some ease of use issues compared to larger libraries, but in general most of these hindrances are consistent across all library size categories.

Table 32. What hinders the public from reading your library's ebook content?
% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Users prefer print or other format	71%	67%	49%	36%	48%	66%	53%	65%
Unaware of ebook availability	35%	70%	71%	86%	65%	42%	77%	64%
Long wait times/Not enough copies of popular titles	60%	62%	53%	57%	61%	72%	48%	51%
Too complicated to access	44%	46%	53%	21%	45%	39%	46%	51%
Too few titles available	33%	38%	36%	21%	30%	45%	27%	27%
Limited access to ereading devices	38%	25%	33%	36%	49%	28%	30%	26%
Difficult to find/discover	27%	26%	31%	21%	34%	30%	42%	19%
Ebooks not always compatible with patron's devices	21%	28%	27%	36%	29%	27%	29%	25%
Much easier to buy or borrow ebooks elsewhere	23%	21%	38%	21%	32%	27%	25%	23%
Registration and password requirements for different ebook platforms	10%	21%	33%	14%	29%	10%	27%	22%
Vendor's ebook app often needs updating	8%	7%	7%	7%	9%	7%	10%	3%
The titles we have are unpopular	4%	5%	7%	7%	6%	7%	5%	3%
Cannot renew ebooks	2%	10%	2%	7%	11%	4%	0%	3%
Other	2%	3%	2%	0%	0%	2%	3%	3%

This isn't the prettiest chart in the world, but aside from "users prefer print or other format" and, to a lesser extent, "long wait times," most of the top hindrances have been on the decline in the past couple of surveys.

Figure 48. What hinders the public from reading your library's ebook content?
 % of public libraries, 2010–2014



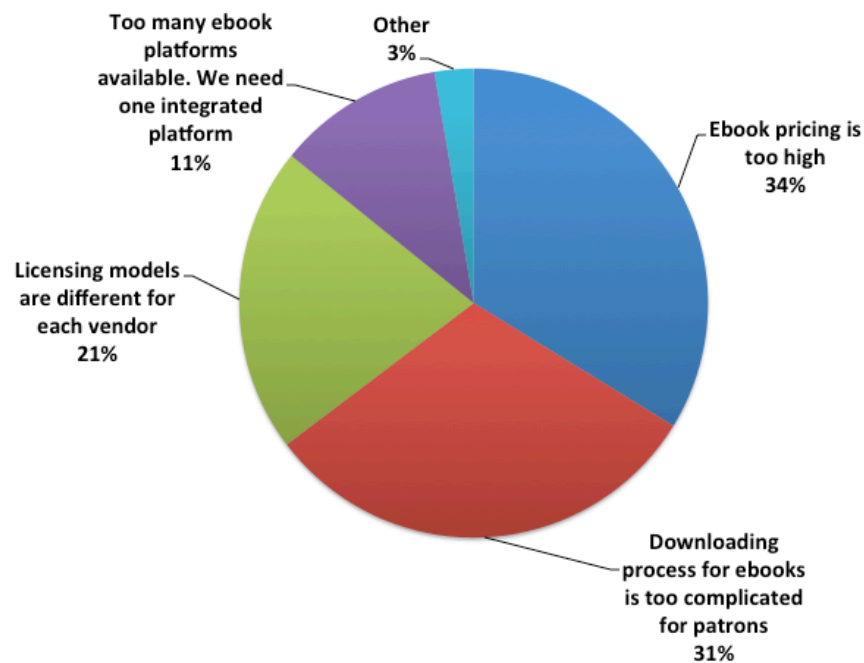
In 2011, "limited titles available" phrased as "limited collection."

Prior to 2015, "too complicated to access" was "complicated downloading process," and "users prefer print or other format" was "users prefer print."

The Biggest Complaint

So what, then, is the biggest complaint that librarians have about ebooks? “Ebook pricing is too high,” selected by one-third of respondents. An additional 31% feel that the “downloading process is too complicated for patrons,” and the panoply of licensing models is the top gripe for 21%.

Figure 49. Thinking about the following common complaints about ebooks, which ONE is your biggest complaint?
% of public libraries, 2015



High ebook pricing and differing license models for each vendor are much bigger issues for the largest libraries. In fact, zero percent of libraries serving 500,000 or more identify the complicated downloading process as their main complaint this year. Smaller libraries, however, are more likely to have “downloading process is too complicated” as their top complaint.

Table 33. Thinking about the following common complaints about ebooks, which ONE is your biggest complaint?
% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Ebook pricing is too high	36%	30%	39%	50%	30%	42%	39%	27%
Downloading process too complicated for patrons	36%	35%	27%	0%	40%	25%	19%	35%
Licensing models are different for each vendor	14%	19%	24%	40%	21%	21%	19%	22%
Too many ebook platforms available. We need one integrated platform	8%	16%	6%	10%	9%	8%	10%	16%
Other	6%	0%	3%	0%	0%	3%	13%	0%

Patrons' Concerns and Requests

For the past two surveys, we had asked about patrons' specific voiced concerns (read: complaints) about accessing ebooks, and how often those concerns are voiced. We expanded this question in this year's survey and added items that were more like requests than complaints.

The six concerns and requests are:

- "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."
- "Why can't I renew library ebooks or keep them late and pay a fine?"
- "Why can't I return my library ebooks before the due date, to ease wait times for others?"
- "I've written an ebook I'd like the library to carry"

Let's look at each of them in turn. The first three are repeated from the last two surveys, giving us the ability to add some historical perspective.

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

The decline in the frequency of this complaint from 2013 when 50% heard it daily or weekly to 2015 (26% now hear it daily or weekly) is indicative of the expansion of libraries’ ebook collections.

Figure 50. 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, 2013–2015

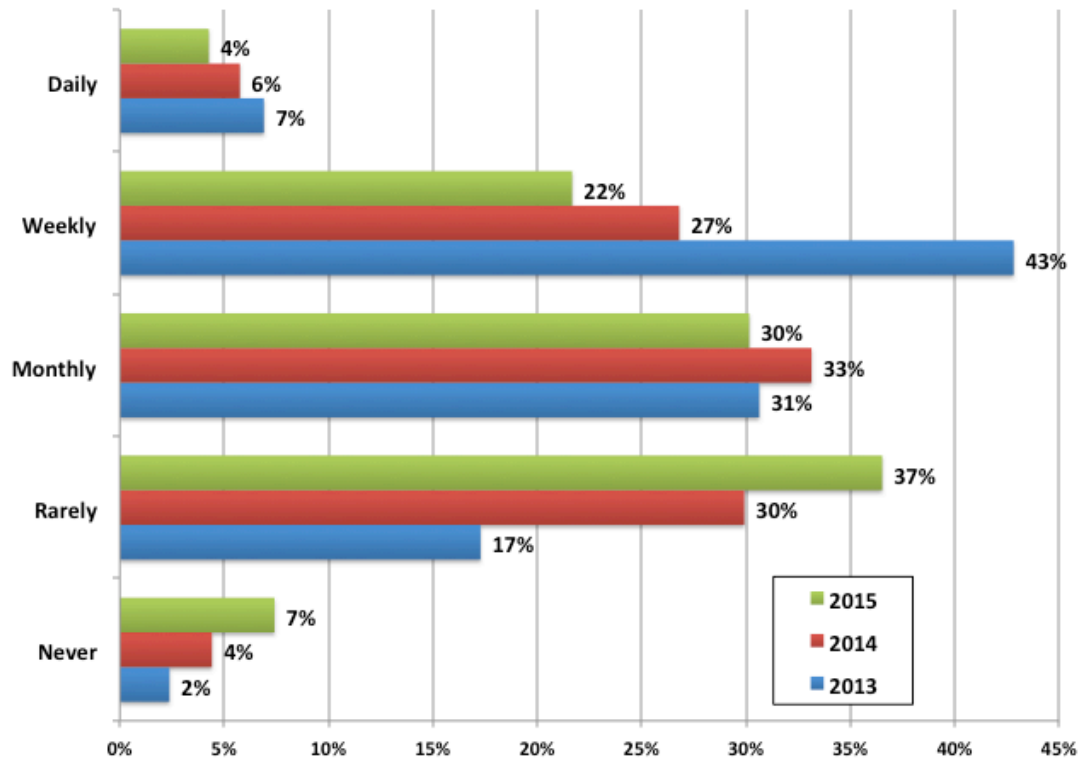


Table 34. How often do patrons vocalize the following concern about ebooks in your library: “The library does not offer a digital copy of the title I want to borrow.”

% of public libraries by population served and geographical region, 2013–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Daily	0%	5%	9%	7%	8%	5%	11%	0%
Weekly	9%	29%	24%	14%	11%	25%	23%	24%
Monthly	26%	37%	27%	36%	33%	25%	25%	34%
Rarely	53%	25%	36%	36%	46%	36%	32%	34%
Never	13%	3%	4%	7%	2%	9%	10%	8%
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%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
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,” but even that has dropped from 42% hearing it daily or weekly in 2013 to only 27% in 2015. Libraries have been able to temper this complaint via implementing a holds-to-copies buying ratio, a “buy now option,” or by patrons simply understanding the wait process for ebooks.

Figure 51. 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, 2013–2015

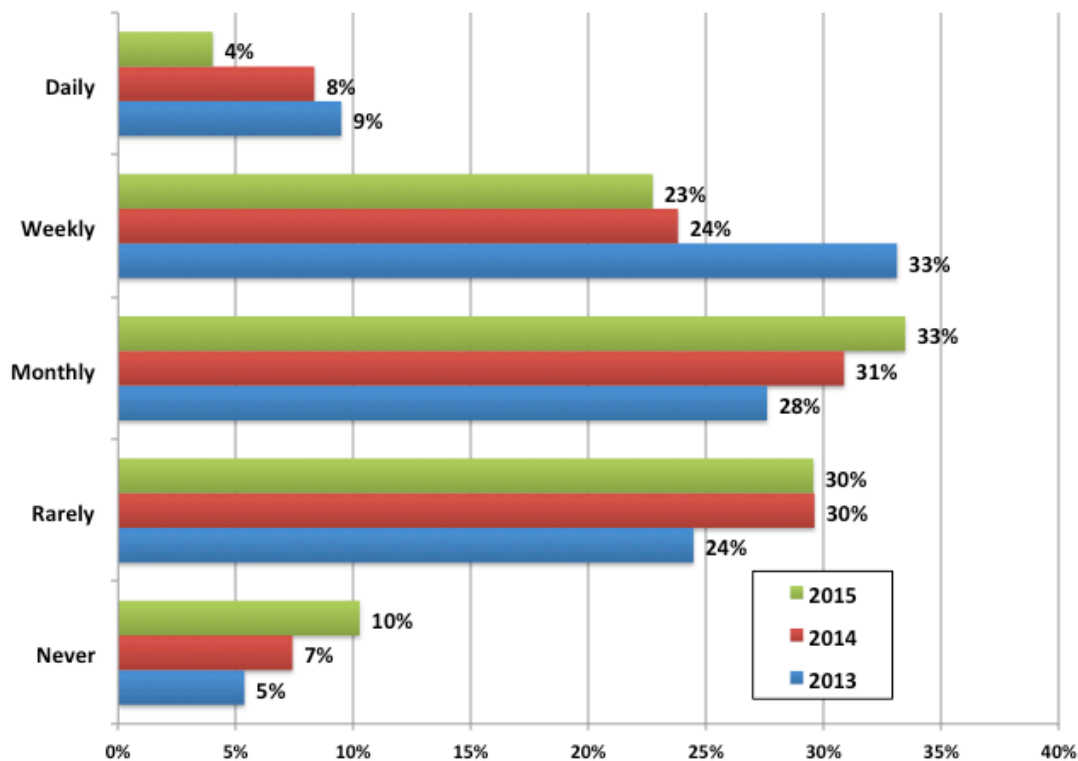


Table 35. How often do patrons vocalize the following concerns about ebooks in your library: “The wait time to borrow ebooks is too long.”

% of public libraries by population served and geographical region, 2013–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Daily	0%	5%	9%	0%	8%	5%	5%	1%
Weekly	11%	30%	27%	21%	14%	23%	29%	25%
Monthly	36%	33%	29%	50%	35%	45%	28%	26%
Rarely	36%	27%	29%	14%	32%	16%	28%	39%
Never	17%	5%	7%	14%	10%	12%	10%	9%
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”

Help with downloading remains fairly common, although fewer librarians hear it on a daily basis even compared to a year ago. All libraries hear this complaint at least sometimes and many librarians’ comments mention how this eats up their time.

Figure 52. How often do patrons vocalize the following concerns about ebooks in your library: “I need help downloading ebooks to my device.”

% of public libraries, 2013–2015

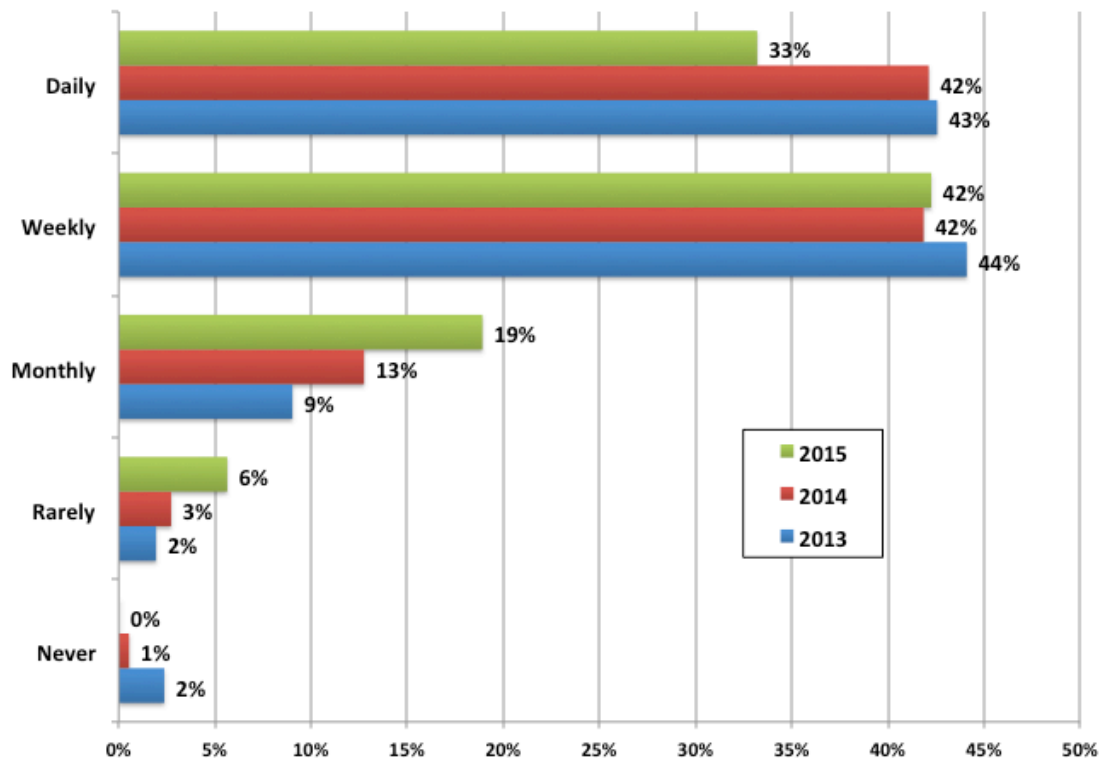


Table 36. How often do patrons vocalize the following concerns about ebooks in your library: “I need help downloading ebooks to my device.”

% of public libraries by population served and geographical region, 2013–2015

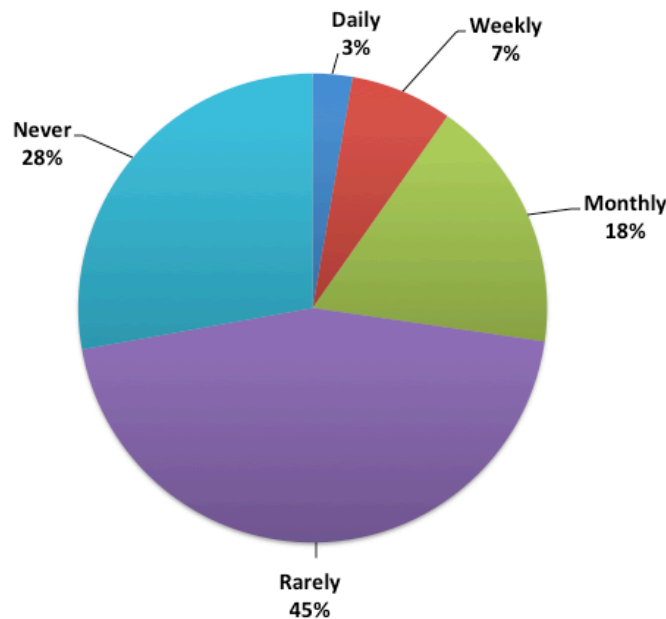
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Daily	21%	36%	42%	29%	27%	40%	31%	32%
Weekly	40%	48%	42%	36%	51%	36%	49%	40%
Monthly	28%	15%	11%	21%	18%	15%	15%	23%
Rarely	11%	2%	4%	14%	3%	9%	5%	4%
Never	0%	0%	0%	0%	0%	0%	0%	0%
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%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
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%

“Why can’t I renew library ebooks or keep them late and pay a fine?”

The first of the three new vocalized concerns not being able to renew ebooks—or keep them late and pay a fine, two things that have been staples of print book lending since time immemorial.⁸ Be that as it may, this is not a very commonly heard concern, with 45% rarely hearing it and 28% never hearing it. It is only ever heard daily or weekly by 10% of respondents.

Figure 53. How often do patrons vocalize the following concerns about ebooks in your library: “Why can’t I renew library ebooks or keep them late and pay a fine?”
% of public libraries, 2015



⁸ Although it is not uncommon for renewal restrictions to be placed on new books and/or bestsellers.

Table 37. How often do patrons vocalize the following concerns about ebooks in your library: “Why can’t I renew library ebooks or keep them late and pay a fine?”

% of public libraries by population served and geographical region, 2015

	<i>Population Served</i>				<i>Geographical Region</i>			
	<i>< 25,000</i>	<i>25,000-99,000</i>	<i>100,000-499,000</i>	<i>500,000+</i>	<i>Midwest</i>	<i>North-east</i>	<i>West</i>	<i>South</i>
Daily	4%	2%	0%	7%	2%	5%	0%	3%
Weekly	2%	10%	9%	0%	14%	6%	5%	5%
Monthly	21%	18%	16%	0%	13%	29%	16%	12%
Rarely	47%	40%	41%	64%	38%	30%	68%	52%
Never	26%	30%	34%	29%	33%	32%	12%	28%

“Why can’t I return my library ebooks before the due date, to ease wait times for others?”

We saw earlier that three-fourths of libraries do allow ebooks to be returned before their due date, so it is not surprising that this is now rarely heard, with only 9% of libraries hearing it weekly, and none hearing it daily. Forty-five percent never hear it.

Figure 54. How often do patrons vocalize the following concerns about ebooks in your library: “Why can’t I return my library ebooks before the due date, to ease wait times for others?”

% of public libraries, 2015

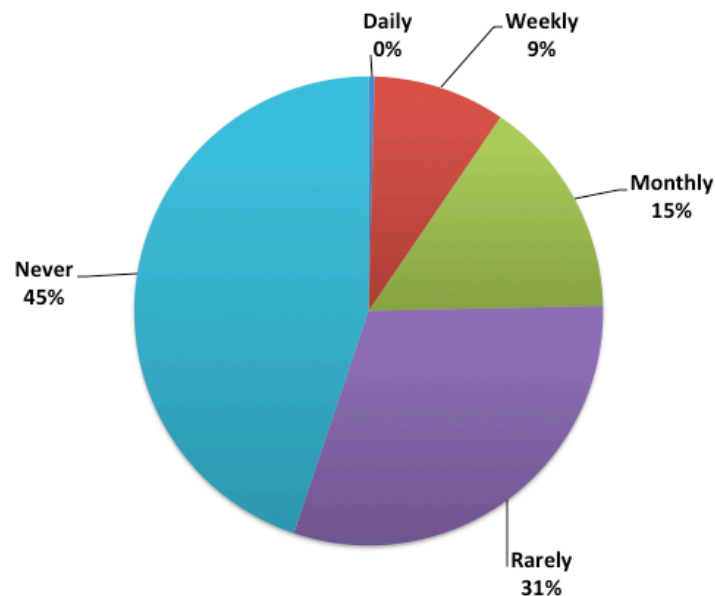


Table 38. How often do patrons vocalize the following concerns about ebooks in your library: “Why can’t I return my library ebooks before the due date, to ease wait times for others?”

% of public libraries by population served and geographical region, 2015

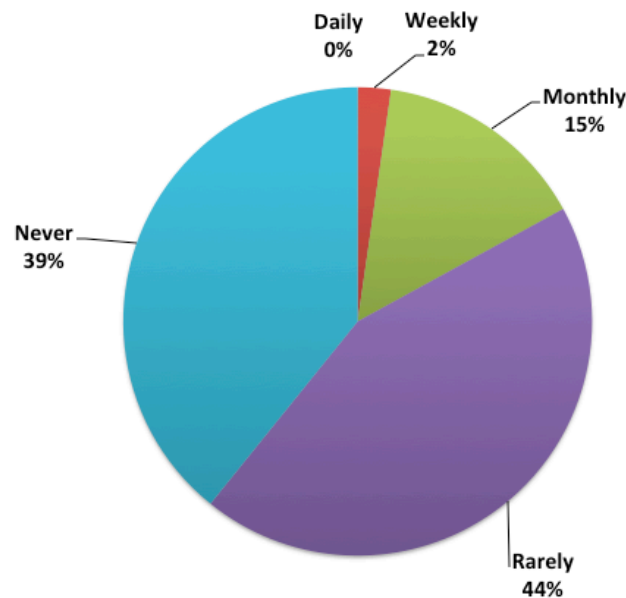
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Daily	0%	2%	0%	0%	2%	0%	0%	0%
Weekly	9%	10%	7%	7%	7%	9%	15%	8%
Monthly	17%	15%	11%	14%	16%	13%	16%	16%
Rarely	26%	30%	27%	43%	27%	25%	40%	33%
Never	48%	44%	55%	36%	47%	53%	30%	43%

“I’ve written an ebook I’d like the library to carry”

We saw earlier that few libraries offer self-published ebooks, but as it turns out there are not too many budding authors asking their library to carry their ebooks: 83% rarely or never hear this request.

Figure 55. How often do patrons vocalize the following concerns about ebooks in your library: “I’ve written an ebook I’d like the library to carry”

% of public libraries, 2015



Ninety-three percent of respondents working in the largest libraries and 34% of those in the smallest do hear from authors at least sometimes, but the largest bulk of them say it is rare.

Table 39. How often do patrons vocalize the following concerns about ebooks in your library: “I’ve written an ebook I’d like the library to carry”

% of public libraries by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Daily	0%	0%	0%	0%	0%	0%	0%	0%
Weekly	2%	2%	2%	7%	0%	3%	2%	3%
Monthly	4%	8%	33%	21%	16%	10%	29%	13%
Rarely	28%	49%	44%	64%	52%	33%	46%	47%
Never	66%	41%	20%	7%	32%	55%	23%	37%

In Summary

The big story here is one we began remarking upon in the previous edition of this survey: libraries are about more than books—p- or e—and in fact they are increasingly seen as media centers that offer content in a variety of formats, some physical, some electronic. Ebooks compete with print books, but they also compete with audiobooks, and libraries have remarked that audiobook interest is growing along with ebooks. It is perhaps not growing as fast as ebooks, largely because it is a much older format, but interest in audiobooks is increasing nonetheless. And libraries arguably have to keep updating audiobook formats—from old cassette tapes, to CDs, to MP3 CDs, and now access to streaming audiobooks. The focus of these reports is on ebooks, of course, but there is an entire library ecosystem that needs to be considered to put our narrow topic in perspective.

On a more practical note, the responses to the “voiced concerns” questions indicate that patrons are slowly but surely becoming accustomed to how ebooks work, and that a lot of the early problems regarding long wait times and unavailability of titles have been largely, albeit not entirely, resolved thanks to greater numbers of titles available in ebook format and larger ebook collections in general. Help with downloading remains a challenge.

In Their Own Words

- *“A big part of my daily job is showing customers how to download ebooks and use an ecatalog. It’s still a work in process for customers over 40 but the younger generations are teaching me.”*
- *“Ebooks are very popular at our library, although many patrons have commented that the overall process can be made easier. Also, many patrons have the misunderstanding that once a book is made available that, because it is an electronic format, many people have access to it at the same time (similar to Netflix) and don’t realize that we purchase and circulate finite copies just like their paper counterparts.”*
- *“Our biggest problem with our Axis 360 platform is that a lot of our patrons have a hard time getting all the accounts and different apps set up. It is very confusing. Other than that, we don’t have a huge collection, and we honestly do a poor job getting the word out about our ebooks—including, insanely, not*

having records of our ebooks in our catalog! I have no power over this at my library and it drives me crazy. I'd make sure this happened before purchasing another ebook, if I could."

- *"Patrons who are comfortable with the technology love them, but they still complain about how complicated they are to use. Library staff often spends a large portion of their time troubleshooting ebook issues with patrons and their devices. And, it is difficult for any one staff member to remain reasonably updated on both the software and the many devices used. Sometimes, calling the vendors for technical support isn't very effective, either. If using ebooks were not so frustrating, we would probably see a dramatic increase in usage."*

4. BUDGETS AND BUYING

This section looks at how much of libraries' budgets are spent on ebooks, what purchasing terms libraries are typically employing in ebook acquisition, how many libraries are part of larger buying consortia, and to what extent local funds are being reallocated from elsewhere, such as printed materials, to beef up ebook collections

Ebooks and Materials Budgets

In this section, we look at the percentage of public libraries' materials budgets that are dedicated to ebooks.

Last Year's Budget

Ebooks represented a mean of 7.0% (median 4.7%) of the last year's (2014) 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 56. Approximately what percentage of your library's materials budget did ebooks represent last year (2014)?

% of public libraries, 2015

Mean: 7.0%

Median: 4.7%

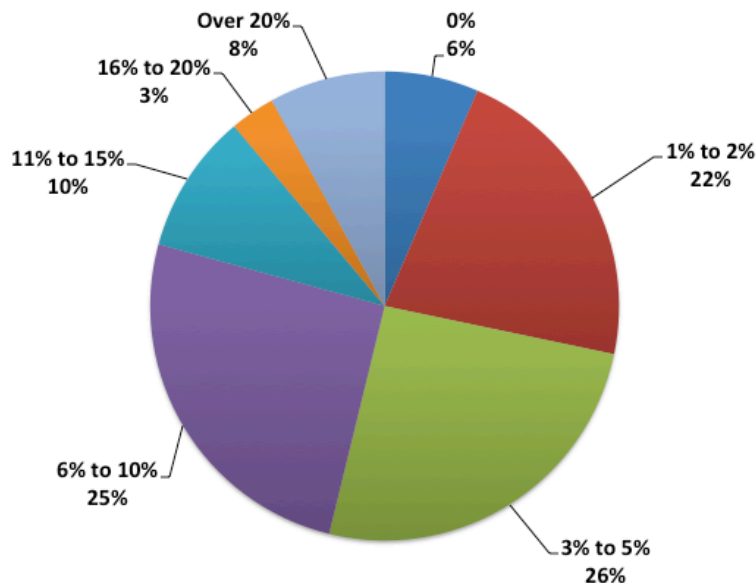


Table 40. Approximately what percentage of your library's materials budget did ebooks represent last year (2014)?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	14%	2%	3%	0%	11%	0%	6%	10%
1% to 2%	39%	19%	9%	10%	21%	29%	17%	18%
3% to 5%	33%	31%	9%	30%	15%	39%	17%	22%
6% to 10%	8%	31%	34%	40%	13%	17%	43%	32%
11% to 15%	0%	14%	16%	10%	11%	9%	10%	10%
16% to 20%	0%	2%	6%	10%	5%	3%	0%	4%
Over 20%	6%	0%	22%	0%	24%	3%	7%	5%
Mean %	3.9	6.3	11.5	7.7	9.9	5.7	7.2	6.7
Median %	1.9	4.8	9.3	7.0	6.9	4.0	6.9	6.0

This Year's Budget

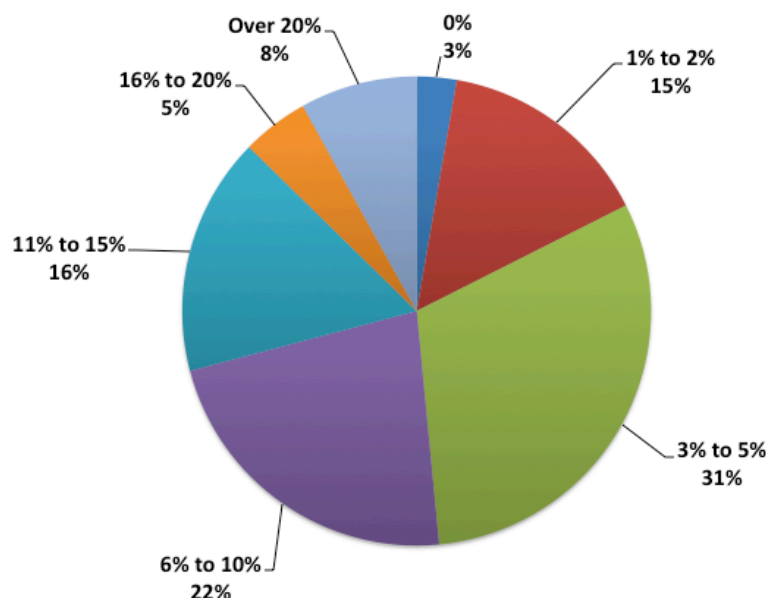
In the current (2015) budget, ebooks have increased modestly as a percentage of the overall materials budget, representing a mean 8.1% (median 6.3%). Three percent said that ebooks represented none of this year's budget.

Figure 57. Approximately what percentage of your library's materials budget do ebooks represent in the current year (2015)?

% of school libraries, 2015

Mean: 8.1%

Median: 6.3%



Ebooks as a percentage of the overall materials budget rises with library size/population served, although—and this was the case in last year’s budget figures we looked at in the previous question—100,000–499,000 population served libraries are spending on average (both mean and median) a larger percentage of their budgets on ebooks than libraries in other size categories.

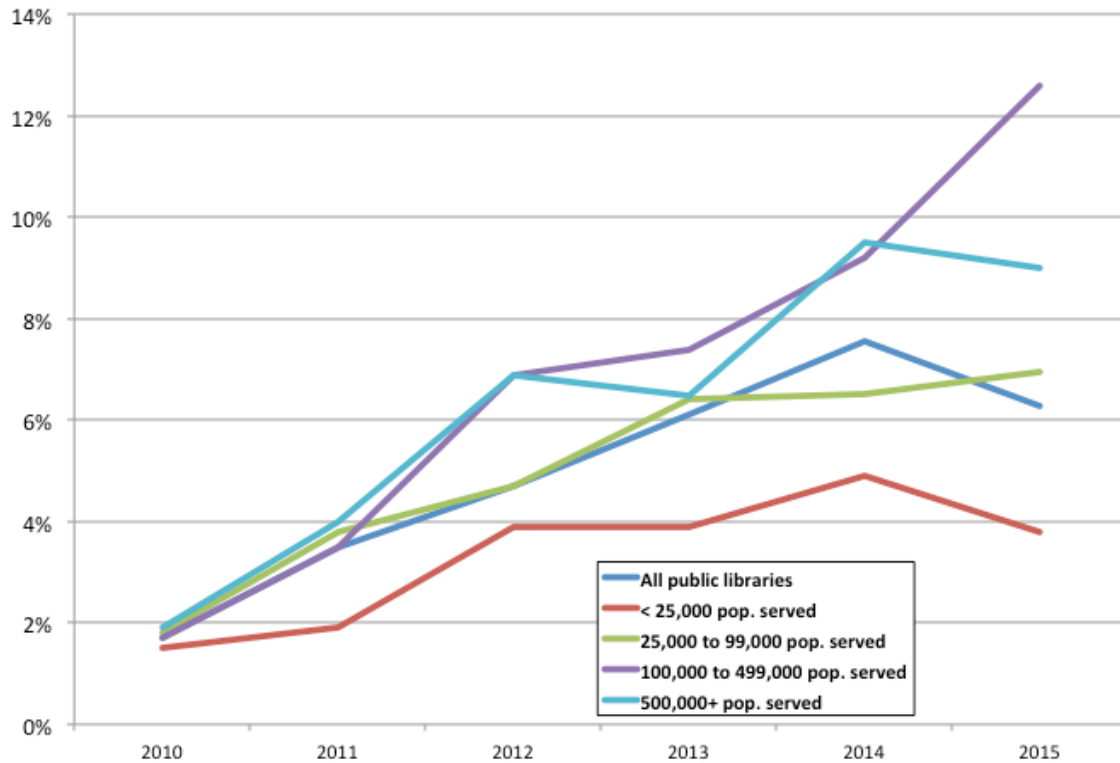
Table 41: Approximately what percentage of your library’s materials budget do ebooks represent in the current (2015) year?

% of public libraries by population served and geographic region, 2014–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
0%	6%	0%	3%	0%	5%	0%	7%	3%
1% to 2%	23%	14%	9%	10%	15%	19%	11%	13%
3% to 5%	54%	26%	9%	10%	21%	48%	13%	27%
6% to 10%	11%	40%	16%	40%	6%	19%	33%	30%
11% to 15%	0%	14%	31%	30%	23%	7%	22%	19%
16% to 20%	0%	5%	9%	10%	5%	5%	7%	4%
Over 20%	6%	0%	22%	0%	24%	3%	7%	5%
Mean %	4.7	7.2	12.5	9.5	11.1	6.1	9.1	7.9
Median %	3.8	6.9	12.6	9.0	11.4	4.3	8.3	7.0
2014								
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

If you compare the median percent spent on ebooks last year to this year from the same libraries answering our 2015 survey, the median percentage increased from 4.7% to 6.3% of the total budget. Comparing the current year’s percentage to the same percentage reported by last year’s 2014 survey respondents, , most size categories, save for the 25,000 to 99,999 and 100,000 to 499,999 sized libraries, devoted slightly less of their materials budgets to ebooks this year.

Figure 58: Median percentage of current materials budget represented by ebooks public libraries by population served, 2010–2015



2020 Budget

How much of the materials budget will ebooks represent five years hence—in 2020? On average, public libraries predict that ebooks will account for 12.5% of the materials budget in five years (median 12.1%). Only 2% forecast that ebooks will not represent any part of the materials budget in 2020, which affirms the general sense that 1 to 2% of all public libraries will not acquire any ebooks.

Figure 59. Approximately what percentage of your library's materials budget do you predict ebooks will represent in 5 years (2020)?

% of public libraries, 2015

Mean: 12.5%

Median: 12.1%

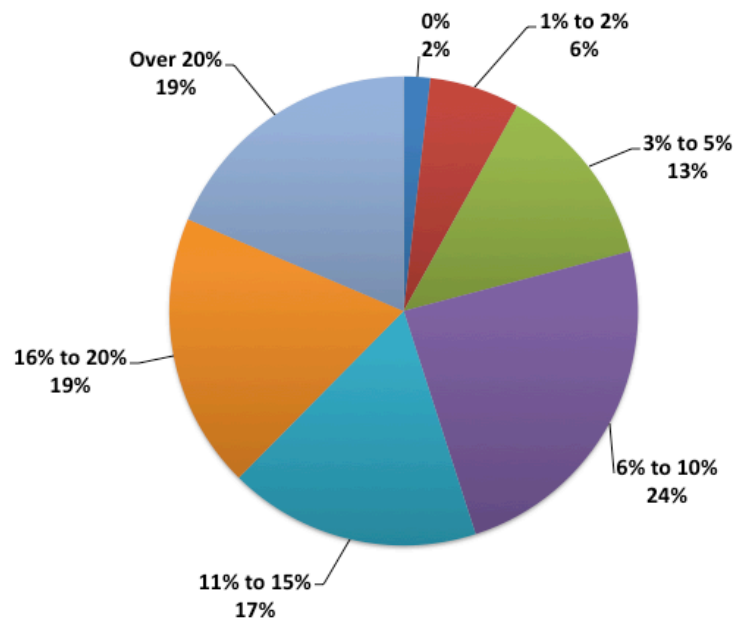


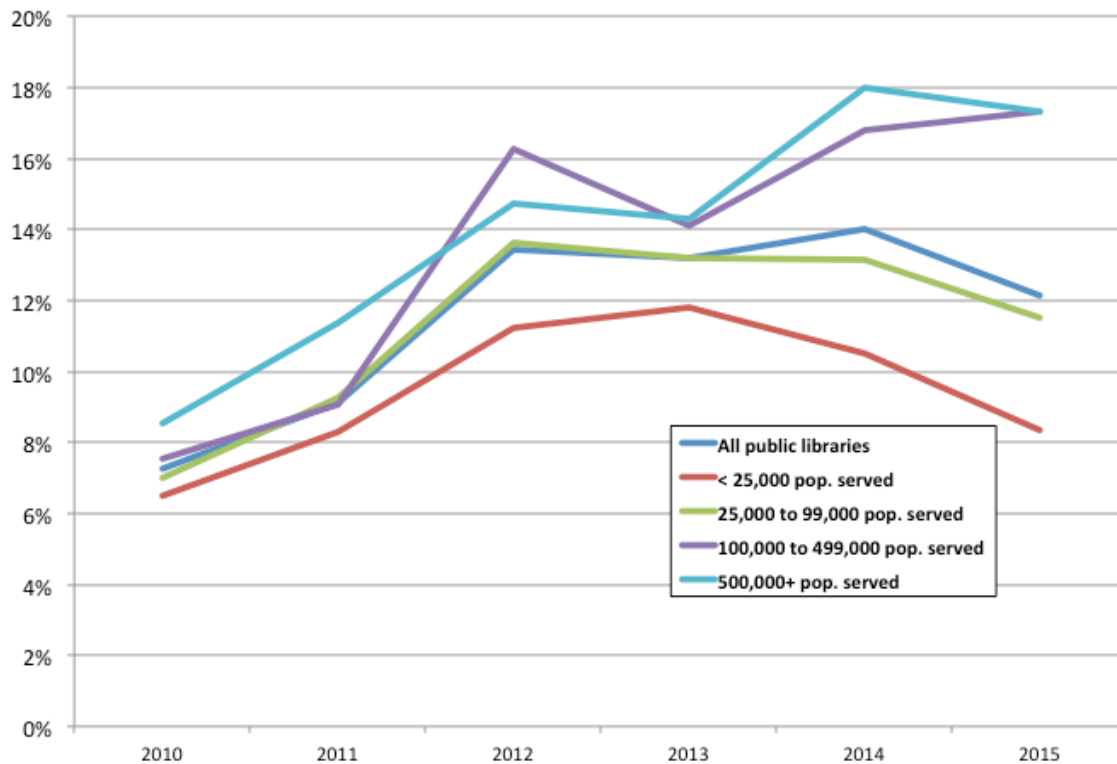
Table 42. Approximately what percentage of your library's materials budget do you predict ebooks will represent in 5 years (2020)?

% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
0%	6%	0%	0%	0%	0%	3%	0%	3%
1% to 2%	8%	7%	3%	0%	5%	10%	11%	2%
3% to 5%	17%	17%	6%	20%	13%	19%	7%	10%
6% to 10%	33%	24%	13%	10%	18%	28%	7%	30%
11% to 15%	11%	19%	22%	10%	0%	11%	34%	26%
16% to 20%	14%	26%	19%	30%	32%	17%	7%	18%
Over 20%	11%	7%	38%	30%	33%	13%	34%	11%
Mean %	10.0	11.5	16.1	15.2	15.3	10.5	14.5	12.0
Median %	8.3	11.5	17.3	17.3	17.9	8.6	13.9	11.7

Looking at six surveys' worth of five-year projections, we see that public libraries continue to temper their forecasts of ebook spending. In 2010, respondents felt that in five years (that is, in 2015) ebooks would represent 7.3% of their materials budgets. As we just saw, ebooks represented a median of 6.3% of the materials budget, so five years ago they were not far off. This doesn't have to be interpreted as a complete cooling on the subject of ebooks; rather, five years ago, libraries likely expected that ramping up their ebook offerings would require some initially high one-time outlays. Couple this with a *slight* decline in interest in ebooks and it seems likely we will continue to see modest declines in ebook spending forecasts.

Figure 60: Median percentage of materials budget represented by ebooks in five years public libraries by population served, 2010–2015



Ebooks Purchased

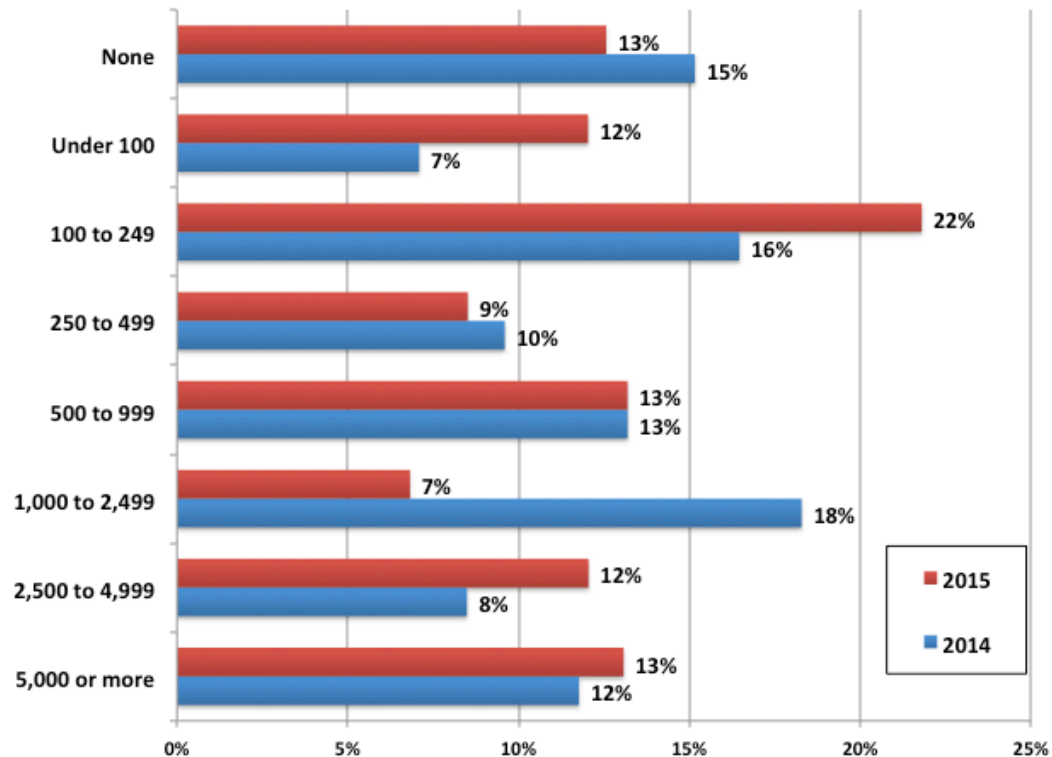
In the last complete fiscal year libraries independently bought on average a mean of 2,543 (median 356) ebook volumes. This is up on a mean basis (from 1,933 last year) but down on a median basis (565 last year).

Figure 61. How many ebook volumes did your library purchase or license (independent of consortially supplied ebooks) in your last complete fiscal year?

% of public libraries, 2014–2015

Mean: 1,933 (2014)/2,543 (2015)

Median: 565 (2014)/356 (2015)



As we saw in the previous set of questions, the larger mid-size libraries account for the increase in median spending on ebooks; all other size categories are down.

Table 43. 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, 2014–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
None	30%	5%	0%	0%	0%	20%	13%	13%
Under 100	24%	13%	0%	0%	12%	24%	0%	7%
100 to 249	16%	40%	14%	10%	23%	28%	17%	18%
250 to 499	8%	10%	10%	0%	19%	14%	0%	2%
500 to 999	14%	10%	17%	0%	15%	5%	19%	16%
1,000 to 2,499	3%	8%	10%	10%	5%	3%	12%	9%
2,500 to 4,999	3%	13%	17%	30%	16%	5%	20%	13%
5,000 or more	3%	3%	31%	50%	11%	1%	19%	22%
Mean	523	1,538	4,232	11,541	2,157	507	4,696	3,595
Median	83	221	2,249	5,000	458	135	1,157	799
2014								
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

In their most recent complete fiscal year, public libraries spent on average \$46,700 (median \$8,400...there were some big outliers in our sample) on ebooks. This is down from what libraries told us last year. In our 2014 survey, libraries reported spending a mean of \$57,342 and median of \$13,002 on ebooks.

Figure 62. Approximately how much did your library spend on ebooks in your last complete fiscal year?
% of public libraries, 2015

Mean: \$46,700

Median: \$8,400

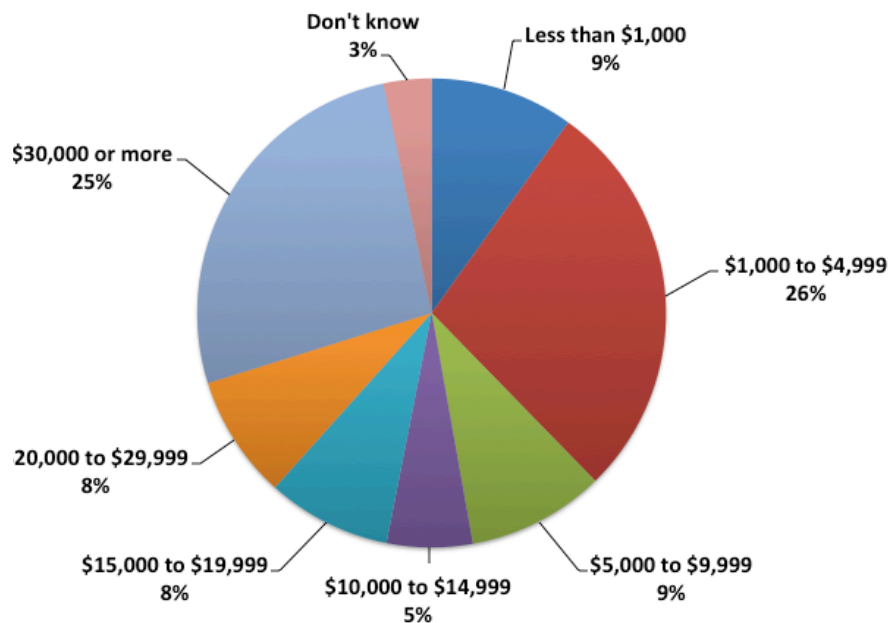
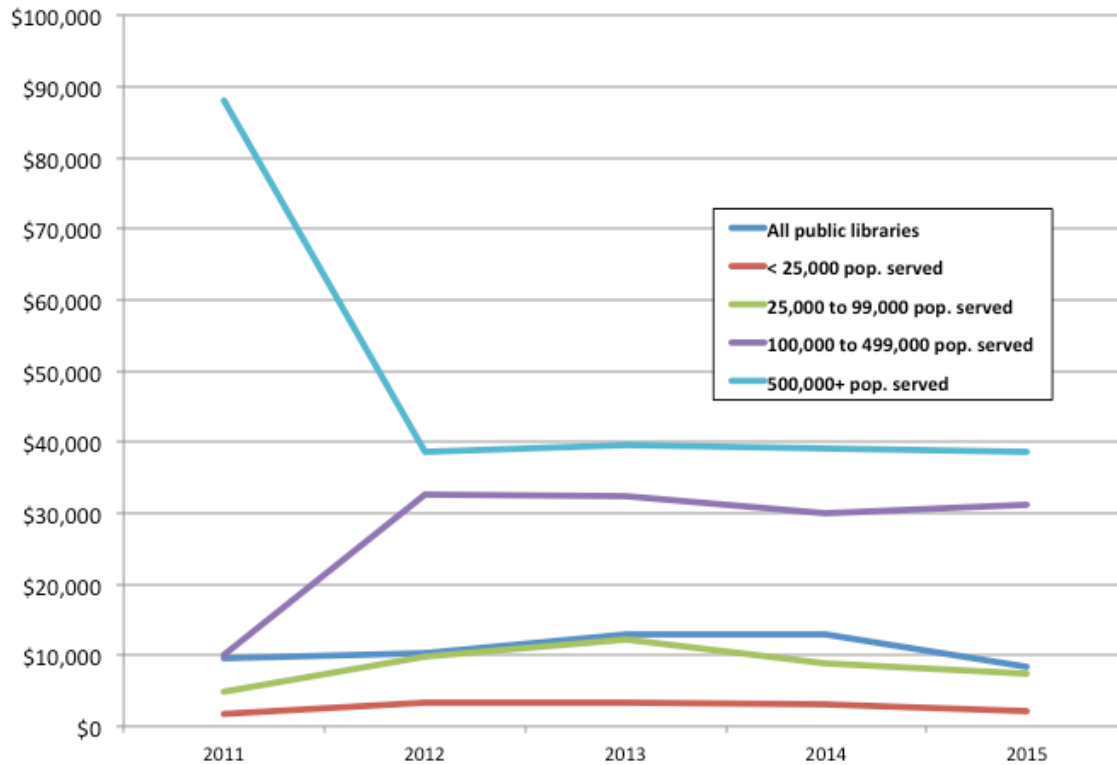


Table 44. Approximately how much did your library spend on ebooks in your last complete fiscal year?
% of public libraries by population served and geographic region, 2015

	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	19%	3%	0%	0%	0%	6%	13%	11%
Less than \$1,000	19%	8%	0%	0%	11%	17%	0%	5%
\$1,000 to \$4,999	43%	28%	10%	0%	12%	30%	29%	27%
\$5,000 to \$9,999	5%	18%	7%	0%	18%	10%	7%	3%
\$10,000 to \$14,999	3%	15%	0%	0%	6%	12%	4%	0%
\$15,000 to \$19,999	3%	10%	13%	0%	17%	5%	6%	6%
\$20,000 to \$29,999	5%	3%	17%	10%	14%	10%	0%	6%
\$30,000 or more	3%	10%	53%	80%	22%	4%	41%	37%
Don't know	0%	8%	0%	10%	0%	5%	0%	4%
Mean (\$)	5,041	12,347	77,211	333,818	40,177	13,610	91,872	59,491
Median (\$)	2,097	7,450	31,250	38,750	15,929	4,105	11,608	16,013

Keeping in mind the footnote (see below) about our rephrasing of the question in last year's survey, median ebook spending is generally flat or down slightly across all library size categories.

**Figure 63: Median spending on ebooks for the current fiscal year⁹
public libraries by population served, 2011–2015**



⁹ In the 2014 survey, we rephrased “current fiscal year” as “last complete fiscal year.”

Reallocation of Resources

Six out of ten public libraries (61%) say that they have had to reallocate funds from other areas of their materials budgets to pay for ebooks. Print took the biggest hit this year; libraries drew on their reference budget less this year than last year. Indeed, reallocation from most other specific areas is down, with 17% of libraries indicating they reallocate from “all areas.”

Figure 64. Have you had to reallocate other areas of your materials budget to pay for ebooks?
% of public libraries, 2015

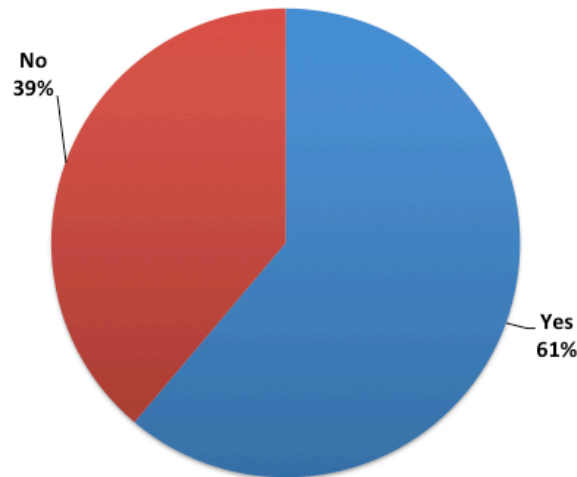


Figure 65. If yes, from what areas or formats?
% of public libraries that reallocate other areas of the budget, 2014–2015

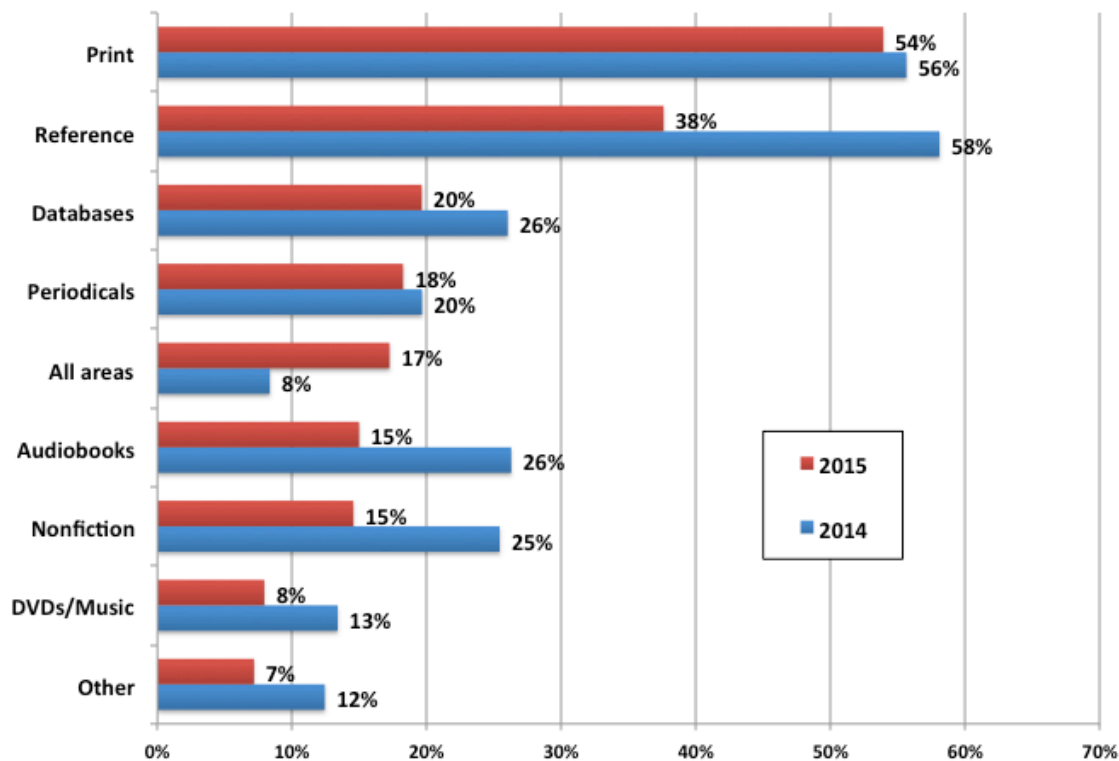
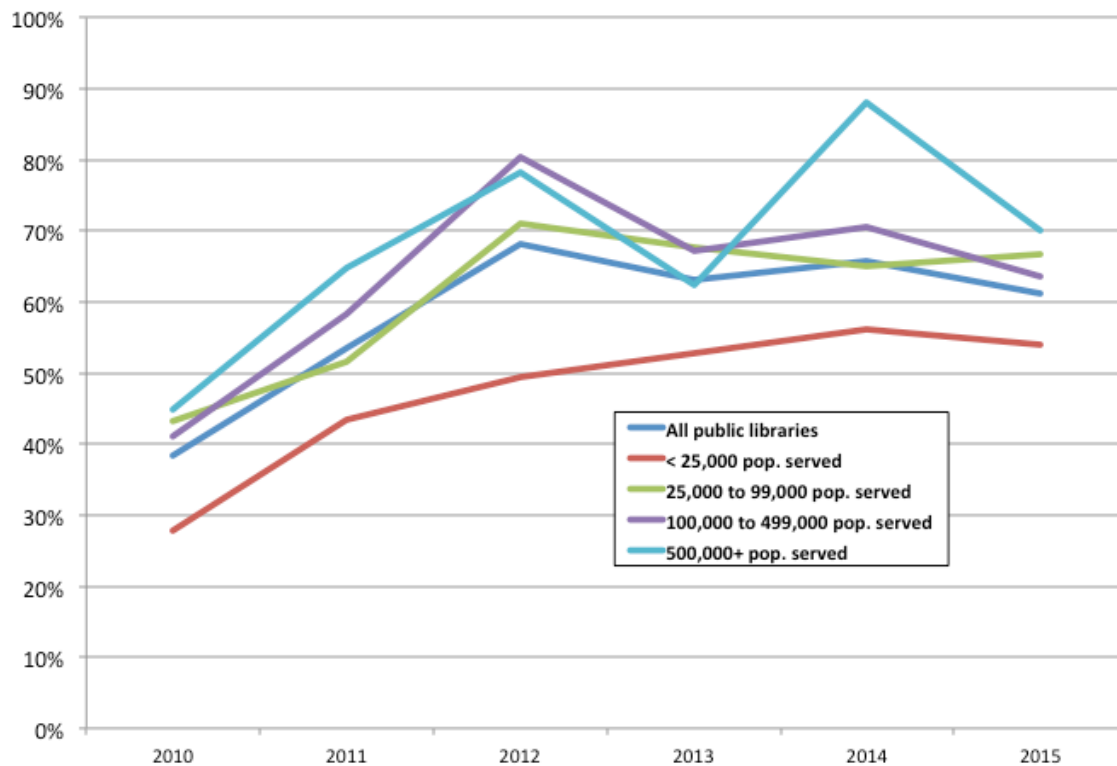


Table 45. Have you had to reallocate other areas of your materials budget to pay for ebooks?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	54%	67%	64%	70%	58%	70%	73%	51%
No	46%	33%	36%	30%	42%	30%	27%	49%
<i>If yes, from what areas or formats did you transfer funds for ebooks?</i>								
Print	75%	46%	48%	43%	57%	47%	72%	50%
Reference	20%	43%	48%	43%	46%	30%	32%	44%
Databases	15%	14%	24%	29%	17%	14%	52%	11%
Periodicals	10%	25%	14%	14%	17%	12%	41%	13%
All areas	15%	7%	33%	29%	15%	22%	17%	13%
Audiobooks	10%	11%	14%	43%	11%	9%	34%	14%
Nonfiction	10%	11%	19%	14%	15%	5%	17%	23%
DVDs/Music	5%	7%	5%	14%	8%	5%	14%	8%
Other	5%	11%	5%	0%	16%	5%	0%	9%

Figure 66. 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

Last year, we added a question specifically 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-fourth of libraries say that they now buy fewer print books, and while that's up four percentage points from last year, 74% (up from 71%) said that ebooks were having "no influence on their print book purchasing."

Figure 67. How has the addition of ebooks to your collection influenced your print book purchasing?
% of public libraries, 2014–2015

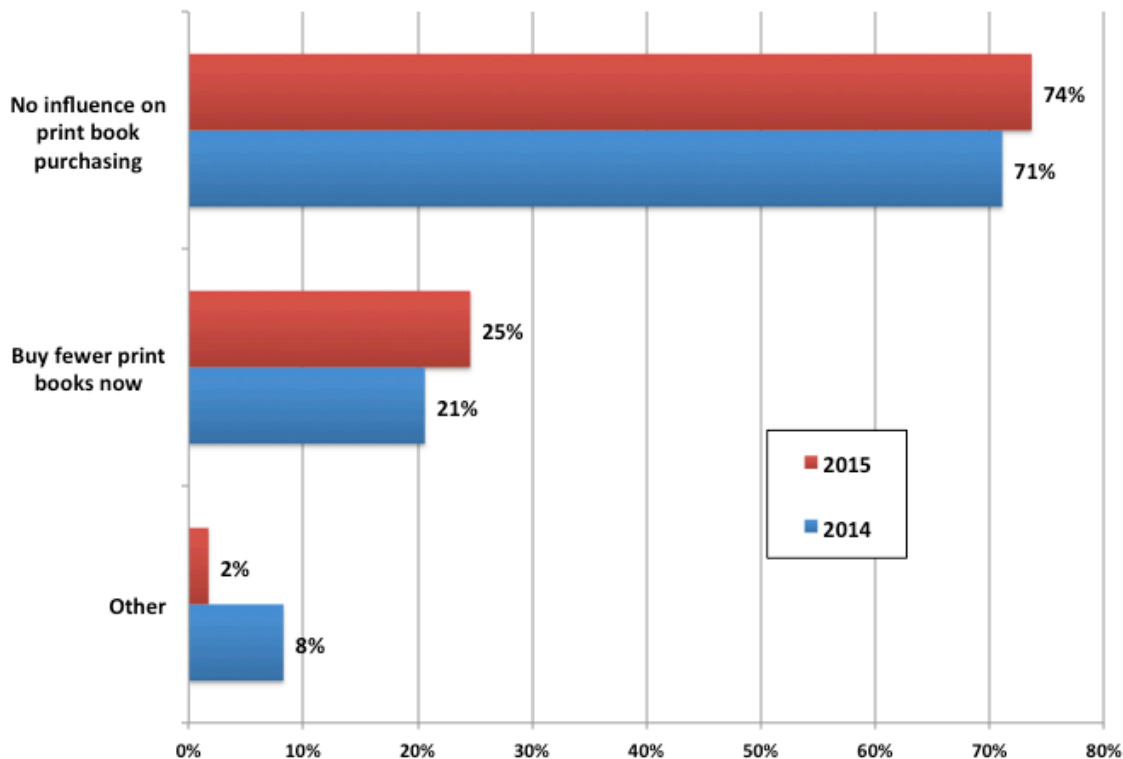


Table 46. How has the addition of ebooks to your collection influenced your print book purchasing?
% of public libraries buying fewer print books, by population served and geographic region, 2014–2015

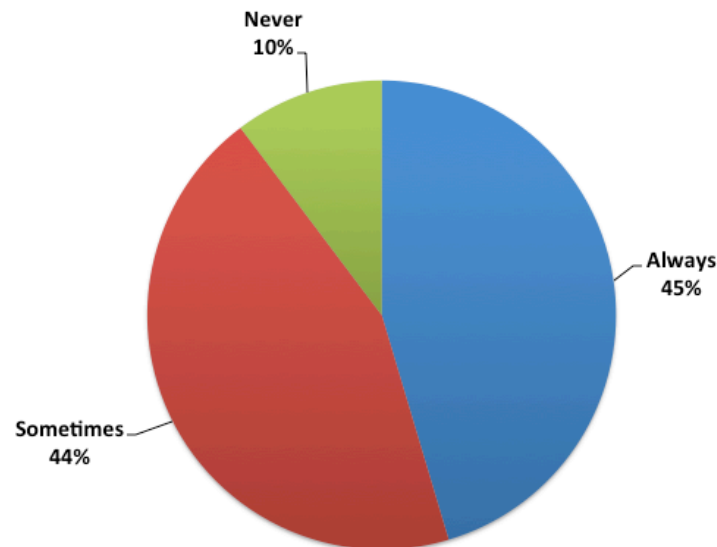
	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
No influence on print book purchasing	84%	70%	67%	60%	72%	84%	61%	71%
Buy fewer print books now	14%	30%	30%	40%	28%	16%	39%	24%
Other	3%	0%	3%	0%	0%	0%	0%	5%
2014								
No influence on print book purchasing	74%	83%	59%	44%	67%	80%	66%	71%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
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%

Print and Ebook Buyers

We added a question to this year's survey that asked if their print book selectors also chose ebooks for the library to carry. For 45% of public libraries, the same people "always" choose both print books and ebooks. An additional 44% said "sometimes" they are the same. For only 10% of libraries, print book selectors are "never" ebook selectors.

Figure 68. Are ebook selectors at your library the same people as the print book selectors?
% of public libraries, 2015



Larger libraries are the more likely to "silo" print and ebook selectors, since they are more likely to have the staff and resources to do so.

Table 47. Are ebook selectors at your library the same people as the print book selectors?
% of public libraries buying fewer print books, by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Always	54%	34%	52%	30%	29%	40%	44%	58%
Sometimes	38%	57%	36%	50%	55%	45%	50%	36%
Never	8%	9%	12%	20%	16%	15%	6%	6%

Purchasing Terms

A perennial question on our survey asks about the contentious issue of purchasing terms. We altered some of the selections on this year's survey to more accurately reflect changes in purchasing terms, so historical comparisons are tricky.

Specifically, we broke "purchase with perpetual access"—long a top two or three purchasing term (it was selected by 52% of libraries in last year's survey)—into "single user" and "multi user." This year, "purchase with perpetual access—single user" came in as the top purchasing term, selected by three-fourths (76%) of libraries. "Set number of circs" came in at 68%, unchanged from last year. "License with a finite time period," a new option added in this year's survey, came in at number three, selected by 59% of libraries. Another new option, "mixed license with either a set number of circs or finite time limit, whichever comes first," is used by 44% of libraries. "Patron-driven acquisition," dropped considerably, from 31% last year to 19% this year.

Over the years, purchasing terms have evolved in response to libraries and patrons, and the number of options available is helping make this a less contentious issue than it used to be.

Figure 69. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?
% of public libraries, 2015

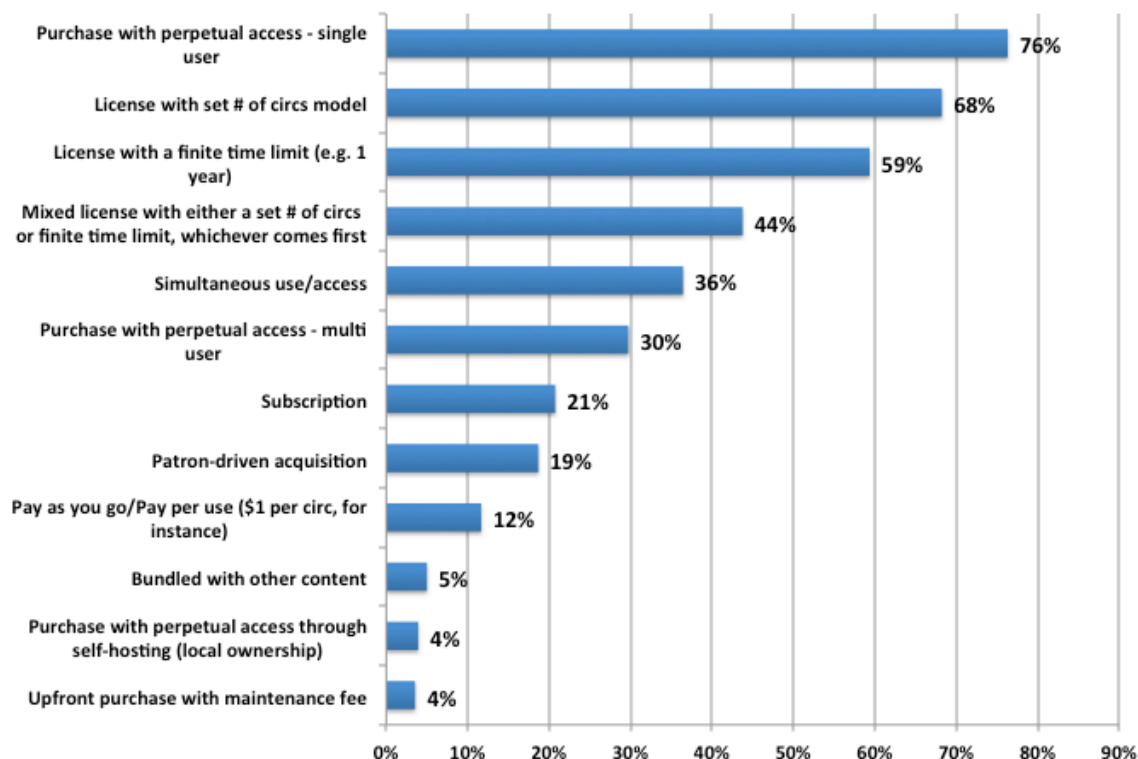


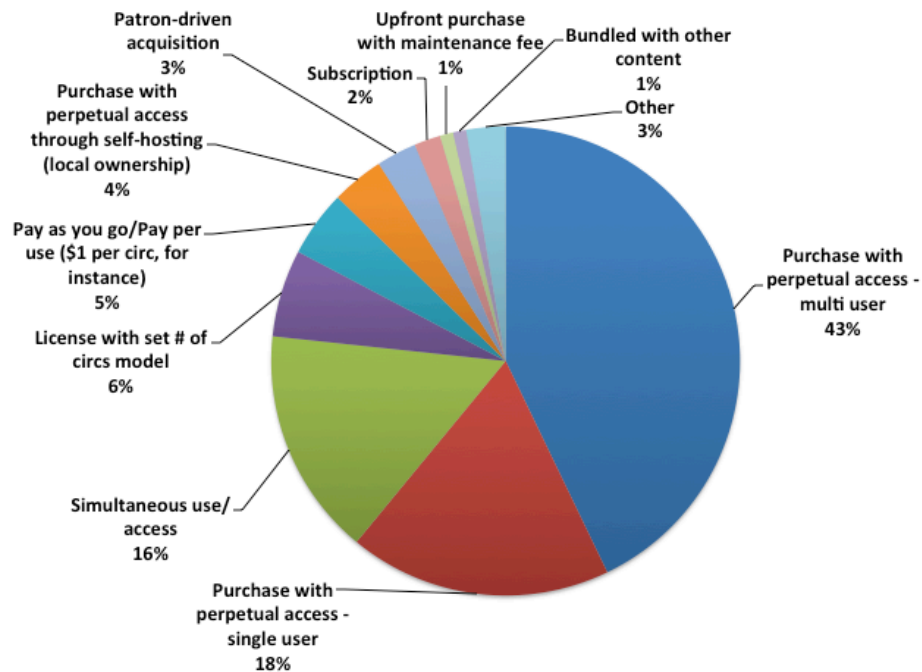
Table 48. What type(s) of purchasing and/or licensing terms does your library typically use when acquiring ebooks?*% of public libraries by population served and geographic region, 2015*

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Purchase with perpetual access - single user	61%	74%	91%	90%	81%	69%	63%	84%
License with set # of circs model	42%	71%	84%	90%	75%	63%	64%	70%
License with a finite time limit (e.g. 1 year)	27%	67%	81%	80%	65%	54%	56%	62%
Mixed license with either a set # of circs or finite time limit, whichever comes first	18%	48%	59%	70%	56%	42%	51%	36%
Simultaneous use/access	18%	33%	50%	70%	41%	27%	39%	41%
Purchase with perpetual access - multi user	24%	29%	34%	40%	18%	29%	44%	32%
Subscription	15%	19%	25%	30%	30%	12%	47%	14%
Patron-driven acquisition	12%	29%	13%	20%	20%	20%	16%	18%
Pay as you go/Pay per use (\$1 per circ, for instance)	12%	10%	6%	20%	13%	6%	28%	10%
Bundled with other content	0%	5%	6%	10%	8%	3%	19%	0%
Purchase with perpetual access through self-hosting (local ownership)	3%	0%	3%	30%	5%	4%	12%	1%
Upfront purchase with maintenance fee	0%	5%	3%	10%	0%	0%	12%	5%

Preferred Purchasing Terms

If librarians had their druthers, what would be the number one preferred ebook purchasing model? There is no 100% clear consensus, but the top item, selected by 43% of libraries, is “purchase with perpetual access–multi-user.” A distant second, selected by 18%, is “purchase with perpetual access–single user.” Generally, libraries like the idea of purchasing with perpetual access, as nearly two thirds of selected some variation of it. “Simultaneous use/access” was selected by 16%, the only other preferred purchasing term in double digits.

Figure 70. If you had to choose one, which purchasing term would you most prefer?
% of public libraries, 2015



The consensus is pretty consistent across all size categories. Single user perpetual access and pay as you go are bigger preferences for very large libraries, and the smallest libraries are the only ones to state a preference for patron-driven acquisition.

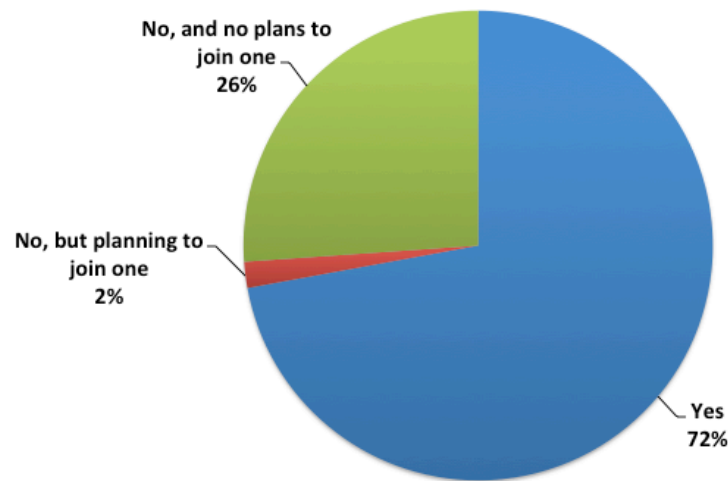
Table 49. If you had to choose one, which purchasing term would you most prefer?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Purchase with perpetual access - multi user	62%	32%	39%	20%	33%	52%	34%	43%
Purchase with perpetual access - single user	9%	20%	21%	40%	27%	11%	26%	17%
Simultaneous use/access	12%	24%	12%	20%	14%	12%	17%	20%
License with set # of circs model	3%	5%	12%	0%	4%	5%	7%	7%
Pay as you go/Pay per use (\$1 per circ, for instance)	3%	5%	3%	20%	6%	3%	8%	4%
Purchase with perpetual access through self-hosting (local ownership)	0%	7%	3%	0%	6%	2%	7%	3%
Patron-driven acquisition	9%	0%	0%	0%	0%	9%	0%	0%
Subscription	0%	0%	6%	0%	9%	0%	0%	0%
Upfront purchase with maintenance fee	0%	0%	3%	0%	0%	0%	0%	2%
Bundled with other content	3%	0%	0%	0%	0%	3%	0%	0%
Other	0%	7%	0%	0%	0%	3%	0%	4%

Consortium Membership

Over the past five years, consortium membership has remained generally consistent, although it has ticked up in our current survey for smaller sized libraries. This year, 72% of respondents (up from 64% last year) said they currently were part of a consortium, and 26% (down from 30%) said they were not. Only 2% plan to join one, up one percentage point from last year.

Figure 71. Is your library part of a consortium license program for its ebook collection?
% of public libraries, 2015



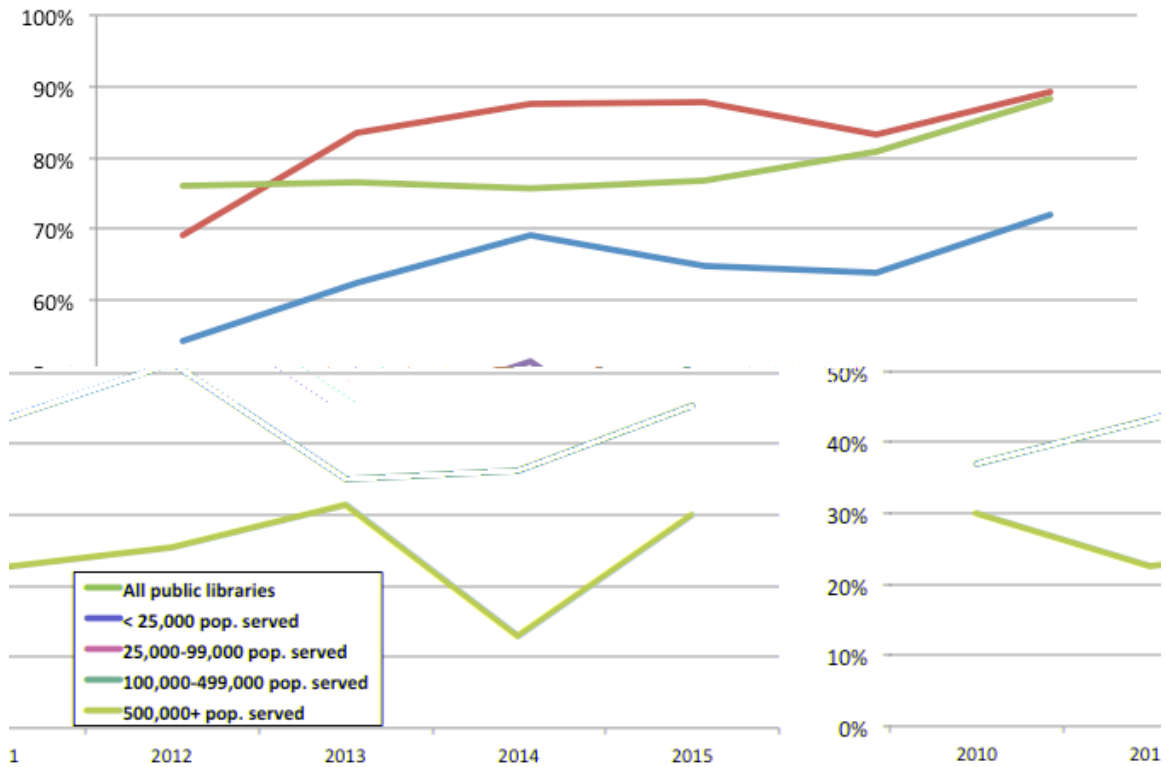
As always, consortium membership decreases quite dramatically as libraries get larger: 89% of small libraries are members of a consortium, compared to only 30% (but even that is up from 13% last year, which we suspected was a statistical anomaly—see the time series chart on the next page) of very large libraries.

Table 50. Is your library part of a consortium license program for its ebook collection?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	89%	88%	45%	30%	45%	94%	62%	71%
No, but planning to join one	3%	0%	3%	0%	5%	0%	0%	2%
No, and no plans to join one	8%	12%	52%	70%	50%	6%	38%	26%

Consortium membership for almost all libraries is at a historical high, especially among smaller libraries. Consortium membership can help ease the budgetary burden of acquiring ebooks, as well as other library resources.

Figure 72. Yes, library is part of a consortium license program for its ebook collection
% of public libraries by population served, 2010–2015



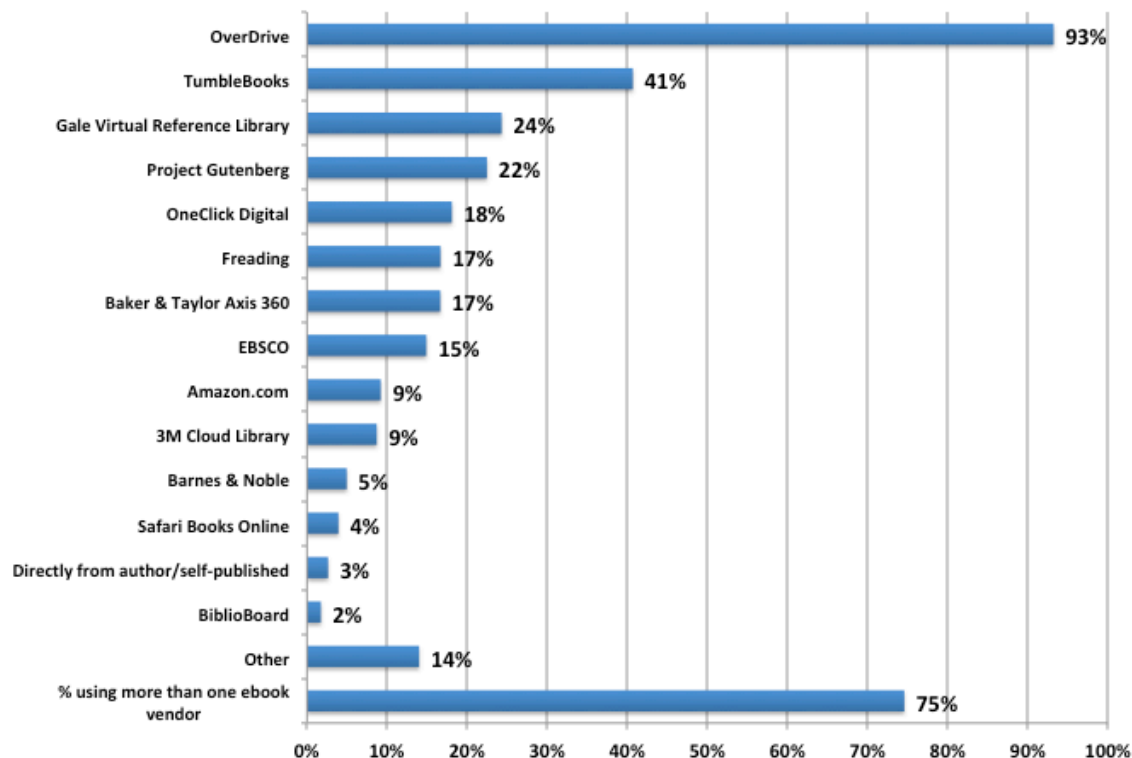
Vendors Used and Preferred

A perennial question we ask in virtually every survey is about vendors. 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, but many have started to come to grips rather than gripes with their vendors.

Early on, there was a lot of “churn” among ebook vendors, but that seems to have stabilized in the past two or three years.

In terms of overall vendors used, OverDrive (cited by more than nine out of ten libraries) continues to dominate the ebook market for libraries. TumbleBooks, specializing in children’s ebooks, is a distant second at 41%. Gale Virtual Reference Library is used by 24% of libraries, and the free online Project Gutenberg was cited by 22%. (OverDrive allows access to Project Gutenberg titles.) Three-fourths of respondents say they use more than one ebook vendor.

Figure 73. From which vendor(s) does your library acquire ebooks?
% of public libraries, 2015



Larger libraries have the ability to frequent a larger number of vendors—90% of the largest libraries say they use more than one vendor, compared to 54% of the smallest libraries.

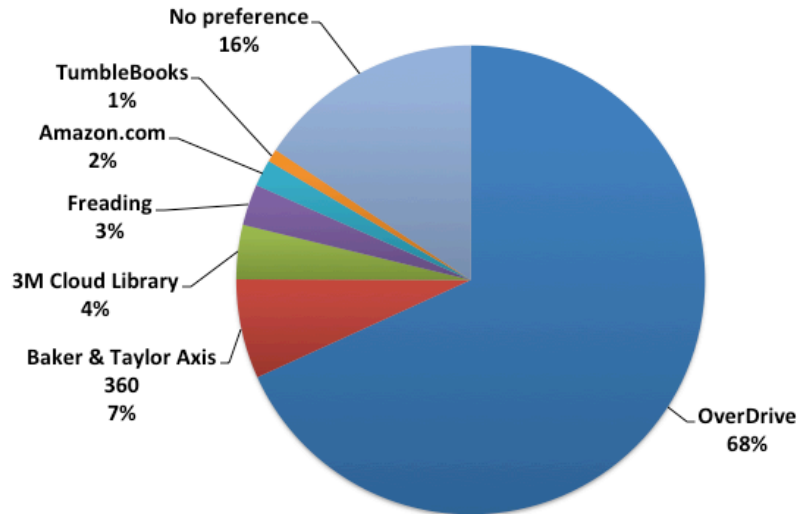
Table 51 From which vendor(s) does your library acquire ebooks?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
OverDrive	92%	95%	91%	100%	81%	95%	94%	98%
TumbleBooks	19%	44%	55%	70%	58%	34%	33%	40%
Gale Virtual Reference Library	5%	30%	33%	60%	32%	10%	30%	30%
Project Gutenberg	11%	21%	36%	40%	37%	11%	26%	23%
OneClick Digital	16%	23%	15%	30%	25%	14%	25%	15%
Freeding	16%	21%	12%	0%	40%	11%	13%	10%
Baker & Taylor Axis 360	19%	23%	6%	40%	18%	17%	16%	16%
EBSCO	5%	21%	18%	20%	22%	10%	9%	18%
Amazon.com	11%	7%	9%	0%	10%	9%	0%	13%
3M Cloud Library	3%	7%	12%	20%	5%	3%	4%	17%
Barnes & Noble	3%	5%	6%	10%	10%	4%	0%	5%
Safari Books Online	0%	9%	0%	10%	0%	5%	7%	4%
Directly from author/self-published	0%	0%	6%	30%	5%	4%	0%	2%
BiblioBoard	5%	0%	0%	0%	0%	6%	0%	0%
Books24x7	0%	2%	0%	10%	0%	0%	2%	3%
Ingram/MyiLibrary/Coutt's	3%	0%	0%	0%	5%	0%	0%	0%
Total Boox	3%	0%	0%	0%	0%	3%	0%	0%
Infobase eBooks	0%	0%	3%	0%	0%	0%	0%	2%
Ebrary	3%	0%	0%	0%	0%	3%	0%	0%
eSebcO	0%	2%	0%	0%	0%	2%	0%	0%
Directly from publisher	0%	0%	0%	10%	0%	0%	0%	1%
Other	5%	5%	15%	0%	9%	3%	14%	9%
% using more than one ebook vendor	54%	84%	82%	90%	87%	65%	73%	77%

Preferred Vendors

In terms of preferred vendors, OverDrive remains far and away the number one choice among libraries, cited by 68% (up slightly from 65% last year). No one else is even close. Sixteen percent (down from 19%) of respondents have “no preference.”

Figure 74. Which is your preferred ebook vendor?
% of public libraries, 2015



Smaller libraries are more likely to have no particular preference. Since nearly half only use one ebook vendor, a preference is hard to state conclusively.

Table 52. Which is your preferred ebook vendor?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
OverDrive	58%	71%	75%	90%	61%	66%	65%	75%
Baker & Taylor Axis 360	3%	12%	6%	10%	15%	7%	15%	0%
3M Cloud Library	3%	2%	6%	0%	5%	3%	0%	5%
Freading	6%	2%	0%	0%	0%	3%	0%	5%
Amazon.com	6%	0%	0%	0%	0%	3%	0%	3%
TumbleBooks	3%	0%	0%	0%	0%	0%	0%	2%
No preference	22%	12%	13%	0%	20%	18%	20%	10%

We asked our survey respondents to briefly summarize why they chose a vendor as their preferred vendor. Here is a sample of the comments:

3M Cloud Library

“Easier user interface. Consortial collection and borrowing as well as local collection and borrowing. More titles in this format.”

“Easiest app to install and use. Wide variety of titles available. Company is very quick to assist us with issues (which are uncommon).”

"They are easy to work with, easiest to use, and affordable."

Baker & Taylor Axis 360

"The title availability is the biggest seller for me...the newer books are available."

"Price point, and did not have to 'share' collection with statewide system."

"They give the best start-up deal for a 20-branch system."

"It is the only platform we could afford as an independent library."

"Same vendor as most of our print books."

Freading

"I like Freading's unlimited access."

"No wait list."

OverDrive

"Although the titles are expensive and don't offer simultaneous checkouts, the mobile app and website are user-friendly for patrons. OverDrive also has excellent technical support."

"Due to the fact that we are a member of a consortium, we have access to a much larger collection. Also, I feel that Overdrive is constantly working to improve access to their ebooks."

"Established platform and Kindle compatibility."

"Huge inventory of titles. Committed to making sure publishers offer ebooks to libraries. Always looking for ways to improve their service to libraries and their patrons."

"Offers a large variety of formats—and offers sales, unlike other vendors."

"Only affordable option for a small public library."

"Selection is excellent. Customer service is excellent. More and more formats, like magazines and movies being offered."

"We are part of a consortium that purchases through Overdrive."

"We have been with them for a number of years and they have improved their service over that period."

"We want to minimize patron confusion by only offering one ebook platform. OverDrive has contracts with all of the big five publishers, so they are the best choice for us."

TumbleBooks

"We get a lot of usage from TumbleBooks because nothing needs to be downloaded."

No preference

"I like them all for different reasons/needs of our patrons. OverDrive is great for popular reads and e-audio, OneClick Digital is great for e-audio, Gale Virtual Reference and EBSCO are great for our researchers, TumbleBooks are great for our teachers and children."

“Recommend for Purchase”

Everyone loves lists and recommendations, so a new question we added to this survey asked if vendors’ “recommend for purchase” lists were helpful for librarians selecting ebook titles. In general, yes, they are helpful; 78% of respondents find such lists either very helpful, helpful, or somewhat helpful.

Figure 75. How helpful are ebook vendors’ “recommend for purchase” lists to you?
% of public libraries, 2015

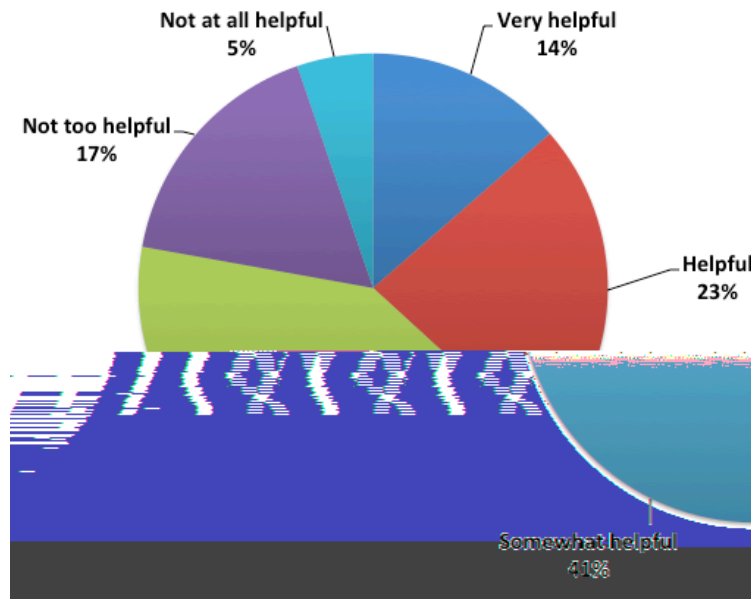


Table 53. How helpful are ebook vendors’ “recommend for purchase” lists to you?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Very helpful	9%	7%	28%	20%	16%	8%	15%	16%
Helpful	18%	21%	28%	40%	10%	20%	39%	26%
Somewhat helpful	47%	51%	28%	20%	53%	37%	29%	43%
Not too helpful	21%	16%	16%	0%	19%	28%	7%	11%
Not at all helpful	6%	5%	0%	20%	3%	7%	10%	3%

We asked those respondents who did not find vendor recommendations to be helpful to write a brief explanation of what they found unhelpful. The most common complaints were that the lists are too long, seem arbitrary, and don’t match the tastes of library patrons. Some specific sample responses:

“They don’t match our patrons’ needs or tastes.”

“Ebook selections at our library are based on local patron needs and overall popularity (i.e., NYT lists) of the title/author.”

“Often the ebooks that are recommended for purchase are titles that I would have purchased if they were available.”

"Our budget is small and we buy based on patron request."

"Recommendations seem more representative of the publisher's wishes than the needs of our patrons."

"The lists are always much bigger than we can afford. Also, there are too many of them."

"They do not carry specialty lists for Romance, African American and similar materials."

In Summary

Library spending on ebooks has leveled off, and in some ways that is a sign of a maturing market; a lot of past ebook spending included one-time outlays to get systems and offerings in place, and now the focus can be on adding new titles. They also have a better sense of what is in demand in their particular library; many of these libraries have been at this for more than five years, so they can draw on that experience and know what to anticipate in terms of typical patron needs.

Purchasing terms remain in flux, but the consensus is that some form of perpetual access—be it single- or multi-user—is the most desirable. Indeed, most libraries do opt for perpetual access-single-user purchasing terms.

To help with costs, consortium membership is at an all-time high, especially in smaller libraries.

In Their Own Words

- *"Being part of the Ohio Digital Library consortium is great because our patrons have access to more ebooks than we could ever afford. While we may not have a high percentage of our patrons using them, the ones who do LOVE them."*
- *"For popular fiction, they are ridiculously expensive and I for one, will not buy them."*
- *"Honestly, the READs consortium that the state of Tennessee provides is more than adequate for our needs. They are more and more popular every year and new patrons are always thrilled when I tell them about the service."*
- *"People like the electronic audiobooks."*

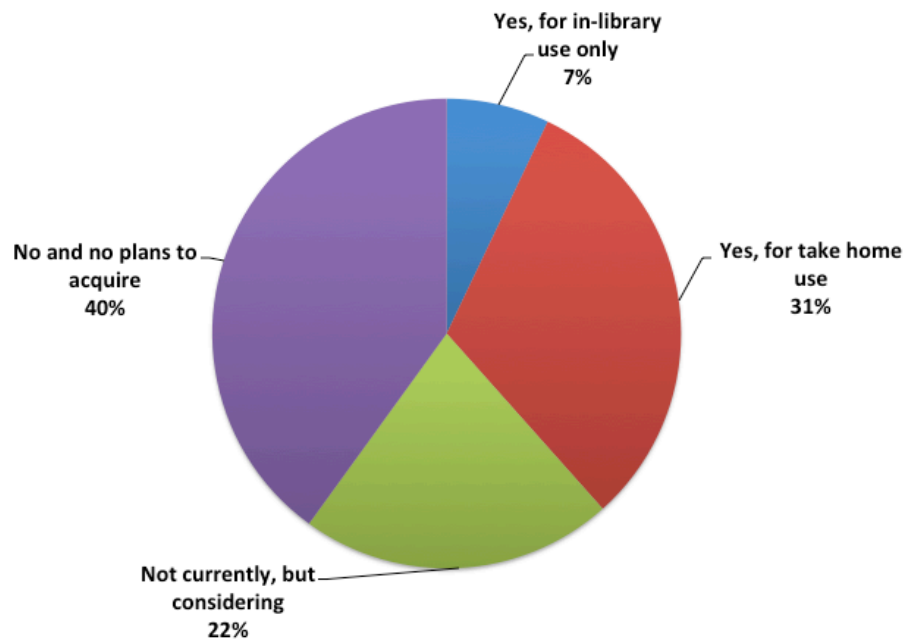
5. EBOOKS AND EREADERS

This chapter looks at ereading devices, particularly public libraries that circulate ereading devices.

Availability of Reading Devices

Every year, we ask whether libraries have ereaders available for patrons to borrow. This year, the number of libraries that do offer ereaders—either for take-home or for in-library use—has climbed from 32% last year to 38% this year. The percentage of libraries offering ereaders for patrons is at historical highs for just about all size categories. The percentage of libraries that have no plans to offer ereaders has remained pretty consistent at 40%.

Figure 76. Does your library have ereading devices available for patrons to borrow?
% of public libraries, 2015



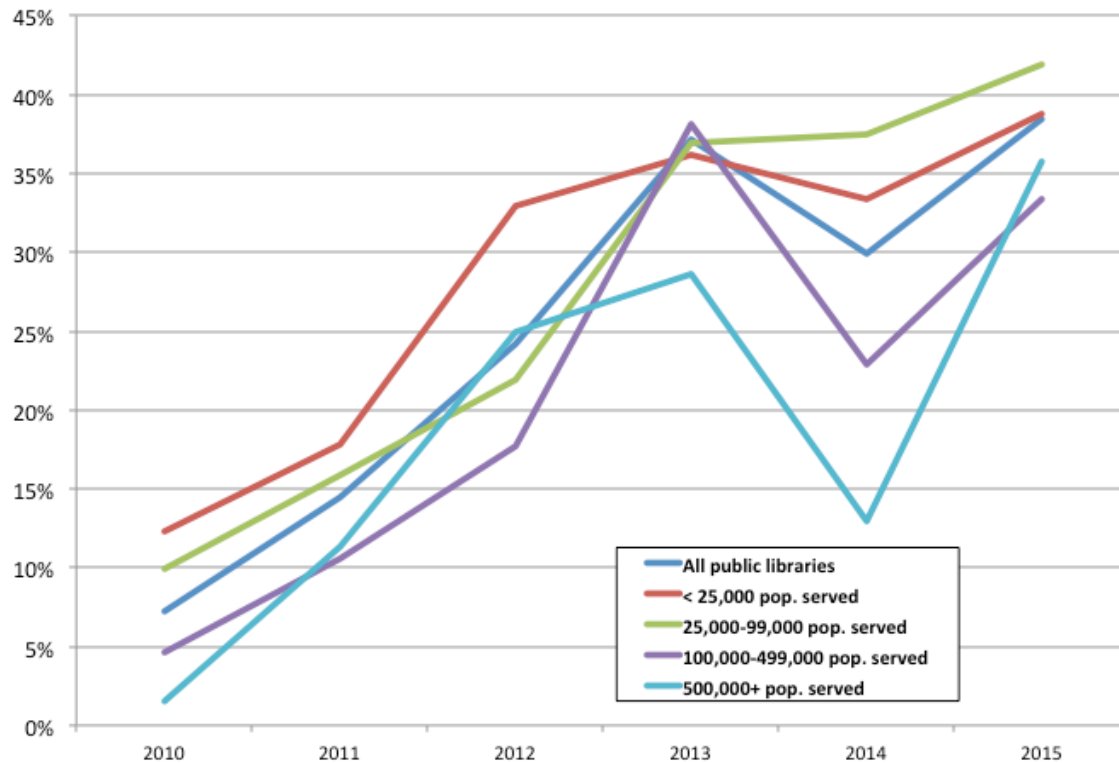
Ereader availability is pretty consistent across all size categories.

Table 54. Does your library have ereading devices available for patrons to borrow?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
NET YES	39%	42%	33%	36%	30%	42%	35%	41%
Yes, for in-library use only	6%	5%	9%	14%	20%	0%	10%	5%
Yes, for take home use	33%	37%	24%	21%	10%	42%	25%	36%
Not currently, but considering	22%	24%	22%	7%	33%	27%	20%	13%
No and no plans to acquire	39%	34%	44%	57%	37%	31%	45%	47%

Last year it appeared that libraries were deciding to cut back on offering ereading devices. Respondents this year continue the upward trend of offering devices, allowing all patrons to take advantage of their ebook collections.

Figure 77. Libraries that circulate ereaders for in-library or home use
% of public libraries by population served, 2010–2015



Which Ereaders Do Libraries Circulate

Of the 38% of public libraries that circulate ereaders to patrons, the Kindle remains the top device circulated, selected by 52% of respondents, although that's on a downward trend. On the other hand, the iPad and iPad Mini are on an upward trend, and are at a near historical high of 43%. The NOOK is in third at 39%, but since Barnes & Noble has sold off its NOOK division, future support for the NOOK is in grave doubt.

Figure 78. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, 2015

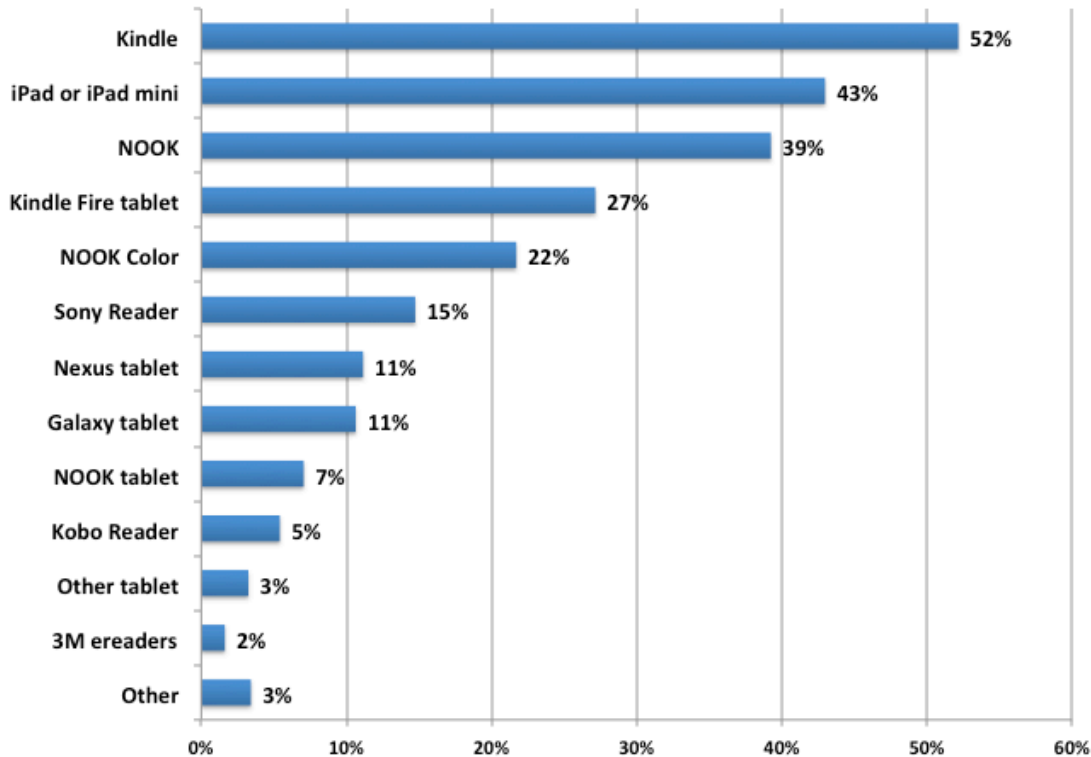


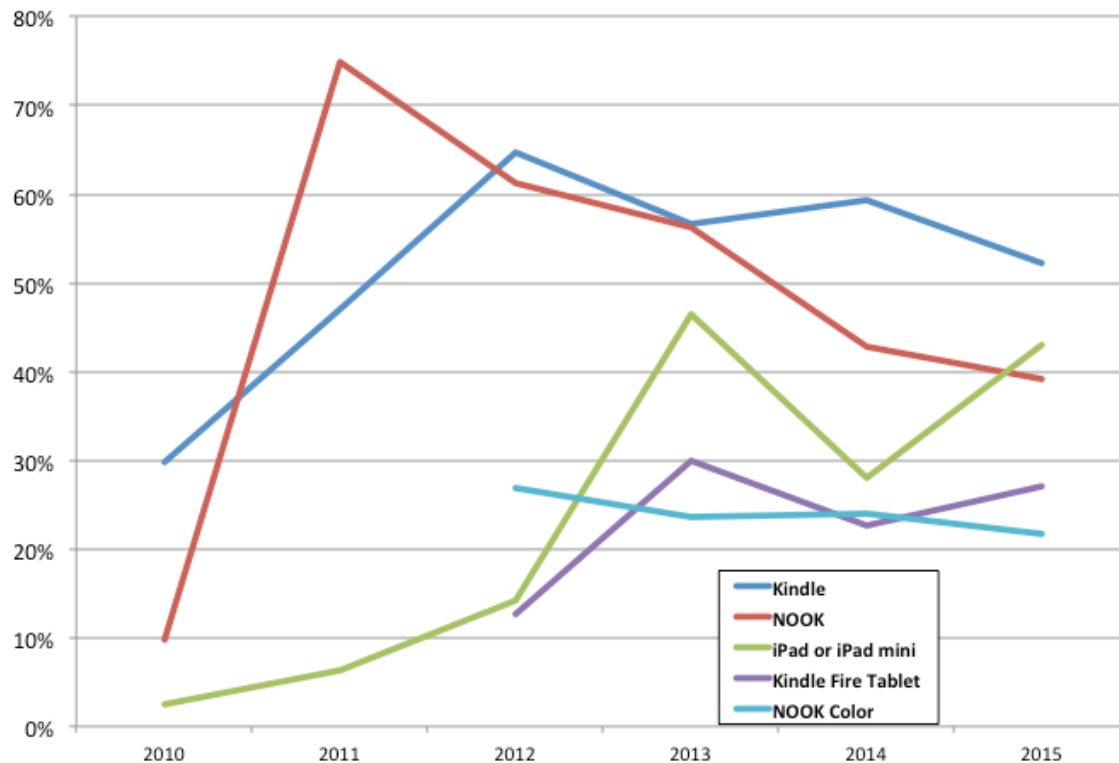
Table 55. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Kindle	58%	62%	33%	40%	48%	67%	72%	37%
iPad or iPad mini	42%	31%	53%	60%	66%	33%	29%	46%
NOOK	32%	54%	27%	60%	59%	53%	34%	23%
Kindle Fire tablet	32%	27%	27%	20%	54%	17%	38%	23%
NOOK Color	21%	27%	13%	20%	48%	17%	0%	22%
Sony Reader	11%	12%	7%	60%	36%	5%	0%	18%
Nexus tablet	5%	8%	13%	40%	48%	12%	0%	0%
Galaxy tablet	0%	12%	13%	20%	41%	3%	14%	5%
NOOK tablet	11%	8%	7%	0%	0%	7%	0%	12%
Kobo Reader	5%	4%	0%	20%	18%	0%	0%	7%
Other tablet	5%	0%	7%	0%	0%	5%	0%	4%

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
3M ereaders	0%	0%	7%	0%	0%	0%	0%	4%
Other	0%	4%	7%	0%	13%	0%	14%	0%

The ereader and mobile device offerings change every year (or even more often), so historical tracking is difficult. However, the figure below gives a good sense of ereader circulation trends.

Figure 79. If yes, which ereading device(s) does your library currently have available?
% of public libraries that circulate ereaders, 2010–2015

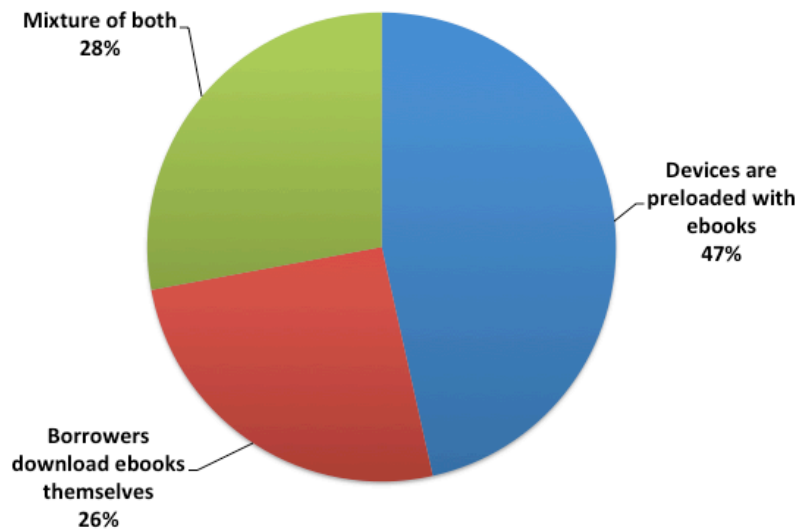


Preloaded Ereaders

Of the 38% of public libraries that circulate ereaders, 47% (down from 54% last year) preload them with ebooks. One-fourth (26%, up from 20%) allow borrowers to download their own ebooks, while 28% (up from 25%) allow a “mixture of both.”

Figure 80. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?

% of public libraries that circulate ereaders, 2015



Smaller libraries are more likely to preload ebooks onto circulating ereaders.

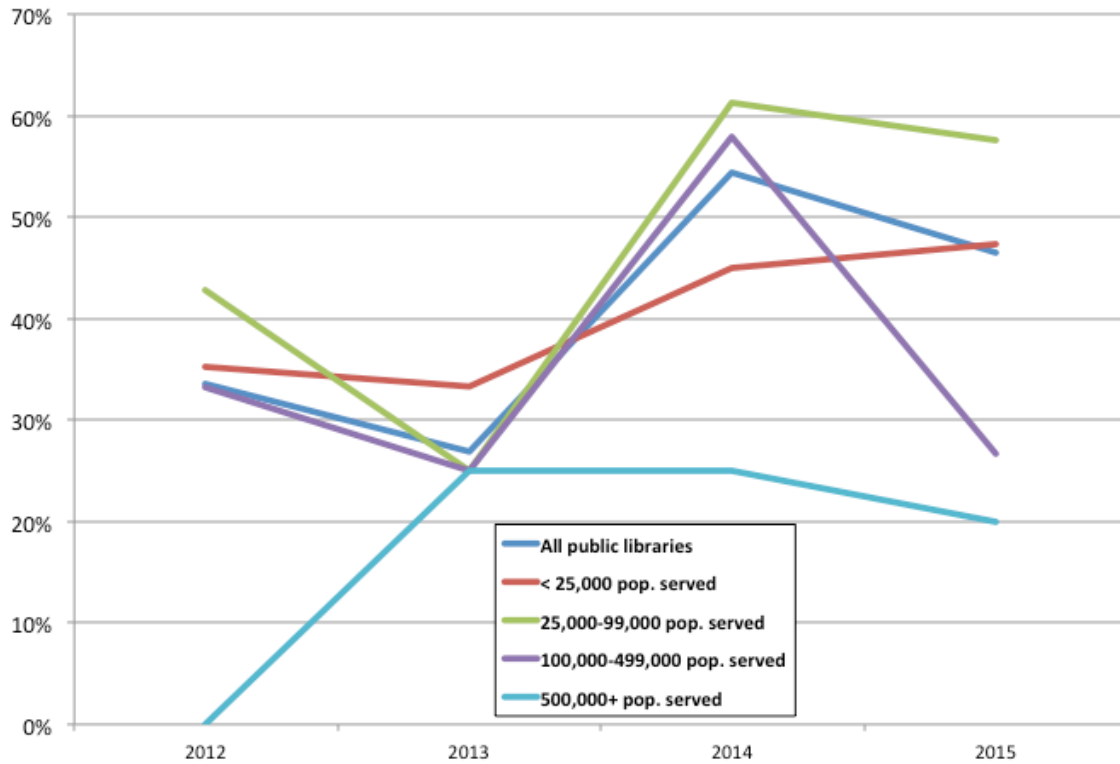
Table 56. Are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?

% of public libraries that circulate ereaders, by population served and geographical region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Devices are preloaded with ebooks	47%	58%	27%	20%	21%	58%	42%	48%
Borrowers download ebooks themselves	26%	12%	40%	60%	18%	18%	15%	37%
Mixture of both	26%	31%	33%	20%	61%	24%	43%	15%

Aside from the smallest libraries, there is a slight trend away from preloading ebooks onto circulating ereaders.

Figure 81. Yes, we preload ebooks on circulated ereaders
% of public libraries that circulate ereaders, 2012–2015



Ereaders in the OPAC

Most libraries (62%, down from 73%) say their open public access catalog (OPAC) returns ereading devices in search results. Thirty-three percent (up from 22%) 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 82. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, 2013–2015

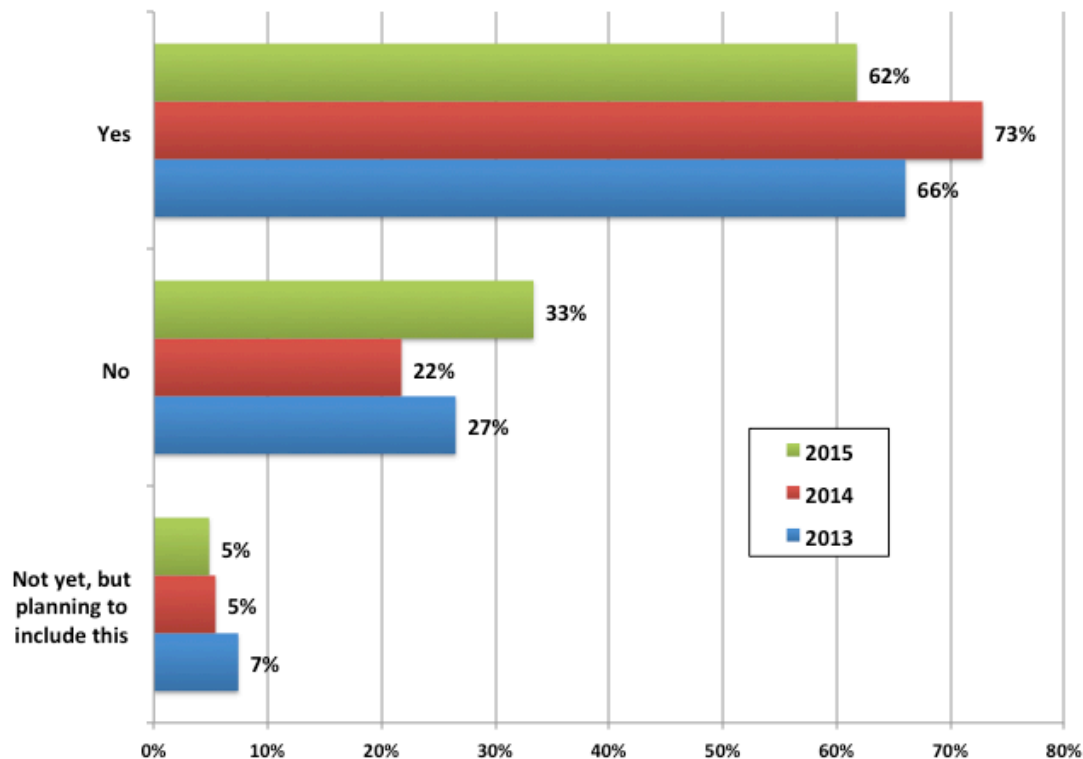


Table 57. Does your OPAC include ereading devices in search results?
% of public libraries that circulate ereaders, by population served and geographic region, 2013–2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
2015								
Yes	58%	69%	53%	40%	34%	59%	57%	75%
Not yet, but planning to include this	11%	4%	0%	20%	7%	2%	0%	8%
No	32%	27%	47%	40%	59%	40%	43%	17%
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								

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

In Summary

Most library users likely already have some kind of ereading device, but there will always be a segment of the population that cannot afford their own electronic reading devices. We expect that the percentage of libraries offering them to patrons will remain generally consistent over time.

The Kindle remains the top device circulated by libraries, but the iPad or iPad mini is gaining ground. The number of libraries preloading titles onto their ebook devices is declining, likely because libraries now have so many choices beyond bestsellers available.

In Their Own Words

- *"The circulation ereaders were troublesome to keep up to date so we are no longer adding content or adding new devices. We are still circulating what we have to give patrons the experience of using an ereader. Our focus is on providing access to content."*
- *"The variety of devices is about to drive us all crazy."*

GENERAL CONCLUSIONS AND TRENDS

The question that has been asked throughout book publishing is, “are ebooks just a fad?” Data on declining ebook sales are inevitably met with either joy or sadness, although they should be met with some degree of questions. It has been found, for example, that comparing sales of print books to ebooks in any given time period isn’t necessarily the best way to understand the ebook market. It has been found, for example, that print books and ebooks are on different sales cycles. As Publishing Technology’s “Content Forward” pointed out in early 2015:

Sales of print books tend to peak in the last quarter of the year as consumers buy books as Christmas presents.... Sales of ebooks, however, seem to peak in the first two quarters of the year, presumably as consumers load up on content to enjoy on the tablet, smartphone or ereader that they received as a Christmas present.¹⁰

There are several factors affecting the ebook market in general, which trickle down to libraries. The first is a decline in sales of books in general, especially fiction, which affects ebook sales. The other issue is the process for tracking book sales; traditional sales tracking methodologies don’t capture the rise of independent and self-published books, which should not be ignored. As this survey shows, libraries are not too vested in self-published titles, but it’s something they may not want to ignore. The difficulty for selectors is knowing what’s available; there are few booklists and lists of new releases—or even reviews—to guide them, so unless it’s a patron-driven acquisition or a local author, the library has no way of knowing such a book even exists.

Our trending shows that ebook demand is there, but circulation has leveled off somewhat. Patrons have become more comfortable with ebooks and even if some tried them and decided they didn’t like them, it is a format that sits comfortably alongside print and even audiobooks (the latter of which should not be ignored in these conversations). Everyone has their preferred format, and libraries continue to support them all.

Good news also abounds in the finding that libraries are much happier with ebook vendors and the logistics of ebook buying and downloading. Sure, problems persist, and ebook pricing is still a big complaint (often an ebook version is considerably more expensive than a corresponding print version, to the bafflement of many), but many of the kinks have been worked out of the system.

¹⁰ Jane Tappuni, “What Nielsen Bookscan data tells us about ebook sales cycles & the ebook plateau,” Content Forward, January 20, 2015, <http://www.publishingtechnology.com/2015/01/what-nielsen-bookscan-data-tells-us-about-ebook-sales-cycles-the-ebook-plateau/>.

Trends to Watch

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

Hot Trends to Consider

- Ebook acceptance continues to be high among the general public.
- Continued health of print books; ebooks are more of a complement/supplement than complete replacement.
- Evidence—both anecdotal and supported by data in the *2015 Survey of Ebook Usage in U.S. School (K-12) Libraries*—that high school and, to a lesser extent, middle school kids prefer print books to ebooks.
- Prevalence of electronic devices—tablets, ereaders, mobile phones—that can all be used to read ebooks.
- Growth of self-publishing, both in print and via ebooks.
- Competition for resources between ebooks, print books, and other types of econtent in libraries.

Lukewarm Trends to Consider

- The general economy is improving, although not as strongly as many would hope. Economic hardship still affects many, which limits their ability to acquire ereaders or otherwise engage with ebooks—except via their public libraries.
- Libraries continue to be challenged by paying for new initiatives and expanded collections.
- The first “smartphone natives” (the iPhone was introduced in 2007) are starting school and the first “iPad/tablet natives” (the iPad was introduced in 2010) are not far behind. These kids grew up with mobile devices. How will this impact the future demand for ebooks?
- An increase in reading on smartphones. As smartphones are able to do more things, become more powerful, and become easier to read on, ebook readers are using their phones as ereaders. This reduces the number of objects one needs to carry around, but may also change the way people read, as they can be distracted by the multitasking abilities of the devices.¹¹
- Ebook demand is leveling off. Demand in libraries will not be of the dramatic variety we saw circa 2012, but will remain at relatively high levels.
- Ease of use challenges will continue to wane.

¹¹ See Jennifer Maloney, “The Rise of Phone Reading,” *Wall Street Journal*, August 14, 2015, <http://www.wsj.com/articles/the-rise-of-phone-reading-1439398395>.

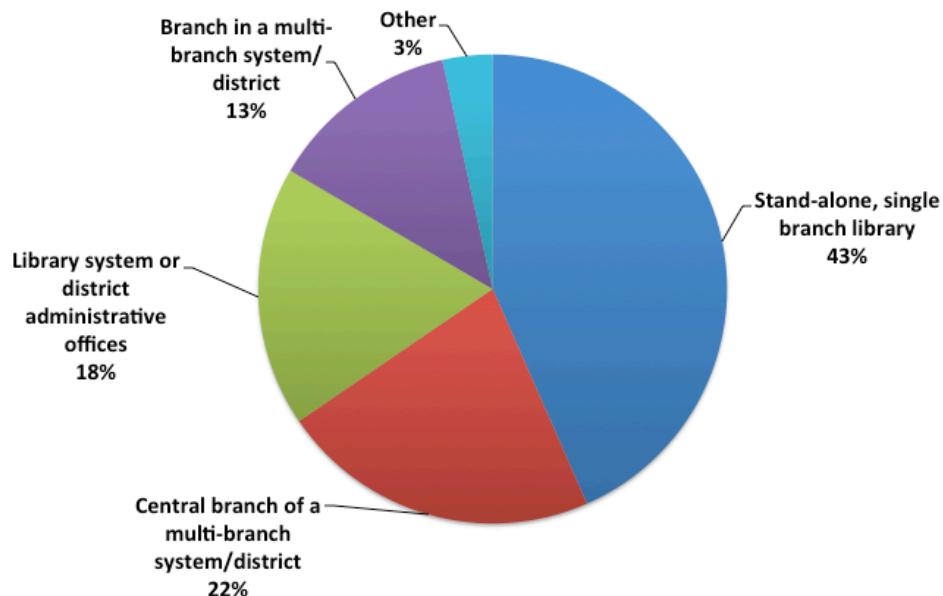
APPENDIX A. PROFILE OF RESPONDENTS

This section provides a basic demographic profile of the libraries that responded to our 2015 survey.

Type of Library

As the chart below shows, 43% of the public libraries responding to this questionnaire identified themselves as a “stand-alone, single-branch library,” 22% identified themselves as the “central branch of a multi-branch system/district,” 13% as a “branch of a multi-branch system/district,” and 18% as a “library system or district administrative office.”

Figure 83. Which of the following best describes your library?
% of public libraries, 2015



The table below breaks the data down by population served and region.

Table 58. Which of the following best describes your library?
% of public libraries by geographic region, 2015

	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	76%	51%	4%	0%	22%	62%	30%	47%
Central branch of a multi-branch system/district	10%	22%	38%	21%	33%	8%	29%	24%
Library system or district administrative offices	2%	8%	42%	64%	21%	10%	19%	22%
Branch in a multi-branch system/district	7%	16%	13%	14%	22%	14%	21%	5%
Other	5%	3%	2%	0%	3%	6%	0%	3%

Population Served

Public libraries responding to our survey serve an average (mean) population of 144,800 (median 54,800).

Figure 84. What size is the population served by your library?

% of public libraries, 2015

Mean: 144,800

Median: 54,800

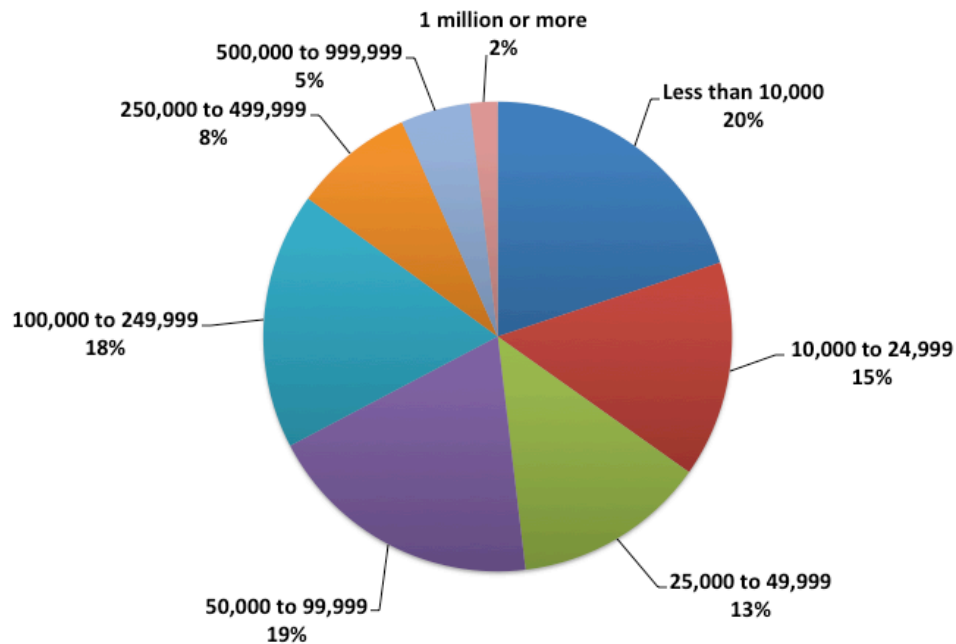


Table 59. What size is the population served by your library?

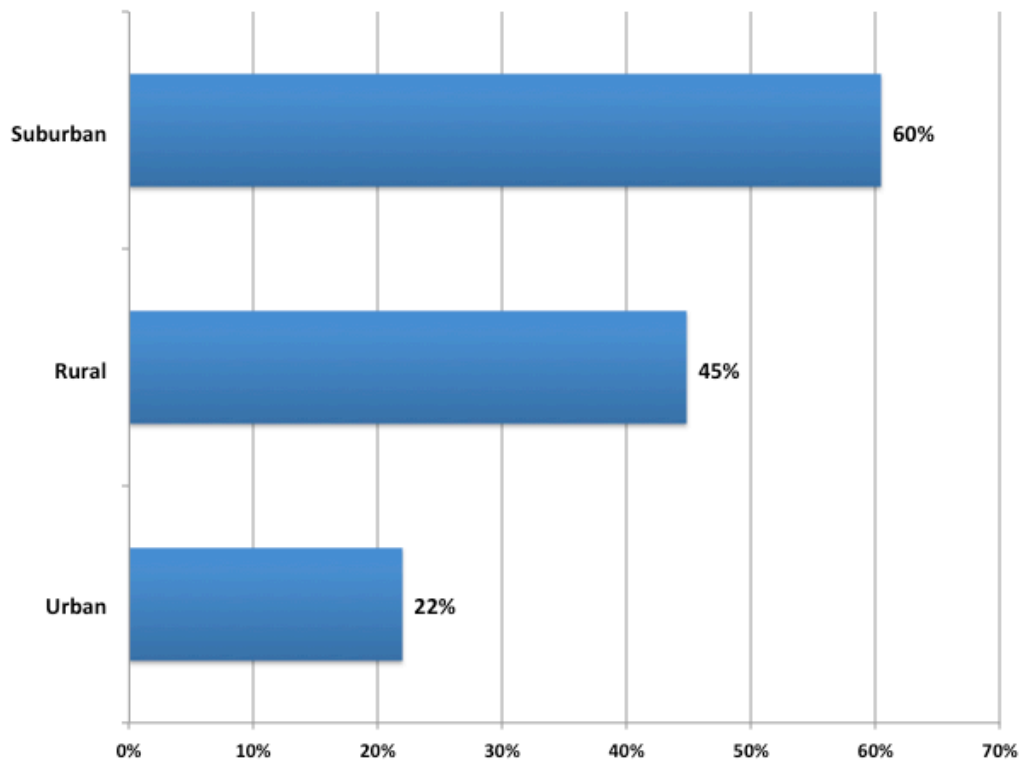
% of public libraries by geographic region, 2015

	Geographical Region			
	Midwest	North-east	West	South
Less than 10,000	8%	28%	32%	16%
10,000 to 24,999	9%	18%	5%	19%
25,000 to 49,999	15%	20%	6%	11%
50,000 to 99,999	20%	23%	5%	21%
100,000 to 249,999	28%	7%	27%	17%
250,000 to 499,999	13%	4%	13%	7%
500,000 to 999,999	5%	0%	7%	7%
1 million or more	2%	1%	5%	2%
Mean	181,626	65,402	221,115	155,155
Median	94,690	29,690	113,335	58,726

Urban, Suburban, or Rural

Six out of ten libraries included in this year's survey are located in suburban locations, 45% are in rural locations, and 22% 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 85. How would you describe your library's location?
% of public libraries, 2015



The following table breaks the public/private data down by population served and geographic region.

Table 60. How would you describe your library's location?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Suburban	32%	71%	80%	71%	56%	61%	64%	62%
Rural	65%	35%	42%	36%	62%	32%	50%	43%
Urban	9%	13%	40%	79%	24%	21%	26%	20%

Library Location

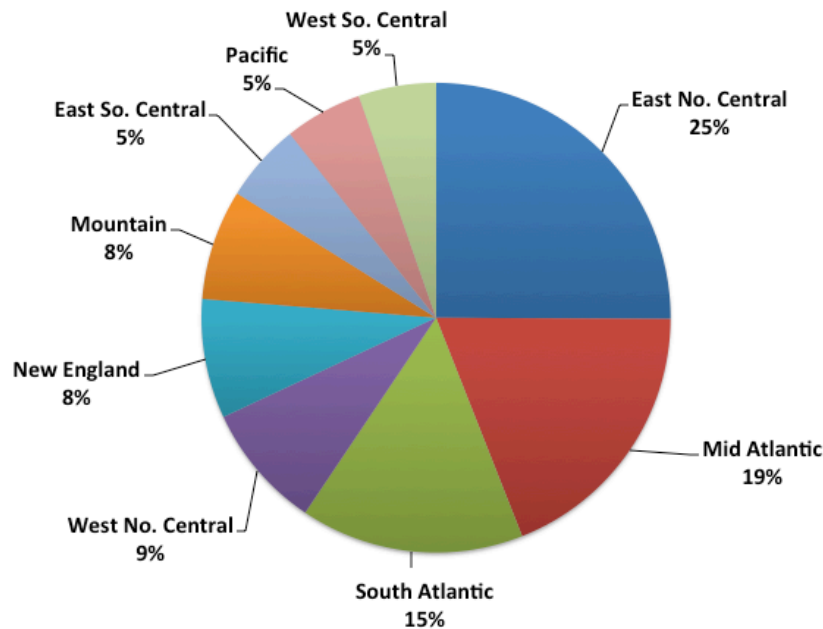
The following designates the geographical location of the libraries responding to our survey, based on U.S. Census Bureau regional classifications:

- 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 86. In which region of the country is your library located?
% of public libraries, 2015



Looking at the four major geographical divisions, we see that this year, our sample skewed a little heavily toward the Midwest and away from the West.

Northeast	27%
Midwest	34%
South	26%
West	13%

Table 61. In which region of the country is your library located?
% of public libraries by population served, 2015

	<i>Population Served</i>			
	<i>< 25,000</i>	<i>25,000-99,000</i>	<i>100,000-499,000</i>	<i>500,000+</i>
East No. Central	22%	29%	20%	21%
Mid Atlantic	26%	22%	11%	7%
South Atlantic	3%	16%	29%	21%
West No. Central	10%	2%	13%	14%
New England	10%	14%	0%	0%
Mountain	9%	2%	11%	21%
East So. Central	7%	6%	4%	0%
Pacific	5%	3%	9%	7%
West So. Central	7%	6%	2%	7%
Northeast	36%	37%	11%	7%
Midwest	33%	30%	33%	36%
South	17%	29%	36%	29%
West	14%	5%	20%	29%

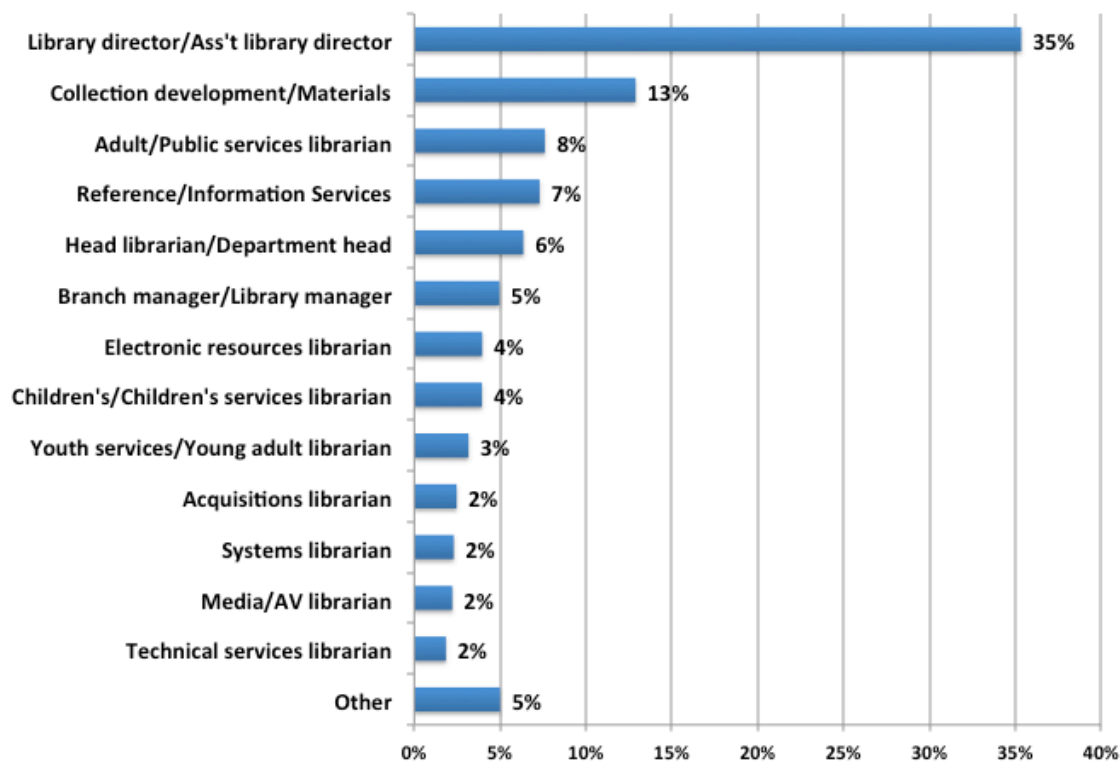
Respondent Job Title/Ebook Recommendation Authority

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

Job Title

More than one-third (35%) of the respondents to our survey gave their job title as “library director/assistant library director,” with another 13% identifying themselves as “collection development/materials section librarian.” The remainder included assorted librarian and managerial positions.

Figure 87. Which of the following comes closest to your job title?
% of public libraries, 2015



The table on the next page breaks the data down by population served and geographical region.

Table 62. Which of the following comes closest to your job title?
% of public libraries by population served and geographic region, 2015

	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	68%	33%	9%	0%	27%	47%	27%	35%
Collection development/Materials selection librarian	4%	6%	24%	36%	11%	7%	22%	15%
Adult/Public services librarian	0%	14%	11%	0%	9%	10%	0%	8%
Reference/Information Services librarian	4%	8%	13%	0%	11%	3%	5%	9%
Head librarian/Department head	2%	8%	11%	0%	3%	7%	9%	7%
Branch manager/Library manager	7%	5%	4%	0%	8%	4%	12%	2%
Electronic resources librarian	0%	3%	4%	21%	6%	0%	7%	5%
Children's/Children's services librarian	4%	5%	0%	7%	3%	3%	0%	7%
Youth services/Young adult librarian	4%	2%	2%	7%	8%	2%	5%	1%
Acquisitions librarian	2%	2%	4%	0%	6%	2%	0%	2%
Systems librarian	0%	2%	7%	7%	4%	4%	2%	0%
Media/AV librarian	2%	3%	0%	7%	0%	5%	0%	2%
Technical services librarian	4%	2%	0%	7%	3%	0%	3%	2%
Circulation /Access services librarian	0%	3%	0%	0%	0%	3%	0%	2%
Library administrator	2%	0%	2%	0%	0%	0%	0%	3%
Paralibrarian	0%	0%	4%	0%	0%	0%	9%	0%
Cataloging librarian	0%	2%	0%	0%	0%	1%	0%	0%
Other	0%	3%	2%	7%	2%	2%	0%	1%

Role in Ebook Decisions

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

Figure 88. Are you involved in the recommendation/purchasing process of ebooks for your library?
% of public libraries, 2015

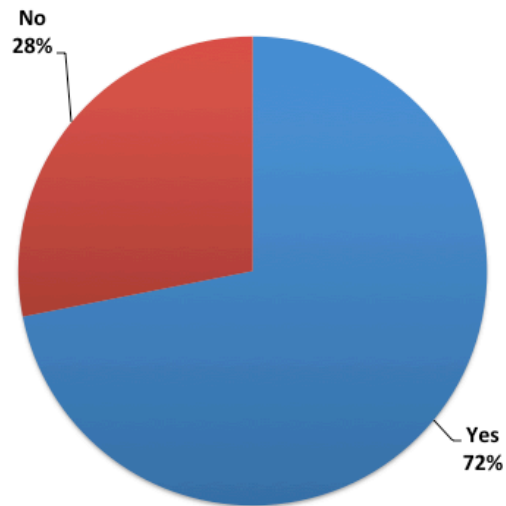


Table 63. Are you involved in the recommendation/purchasing process of ebooks for your library?
% of public libraries by population served and geographic region, 2015

	Population Served				Geographical Region			
	< 25,000	25,000-99,000	100,000-499,000	500,000+	Midwest	North-east	West	South
Yes	76%	71%	73%	71%	71%	75%	79%	68%
No	24%	29%	27%	29%	29%	25%	21%	32%

APPENDIX B. PUBLIC LIBRARIES METHODOLOGY AND QUESTIONNAIRE

The Survey Methodology

The public library ebook survey was developed by *Library Journal* and *School Library Journal* to measure ebook collection and circulation numbers, 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 3, 2015 to June 3, 2015. A survey invite and reminder were sent directly to a selection of *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 317 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 datasets used for comparisons were based on 538 U.S. public libraries in 2014, 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

Numbers in **green** indicate new question added in 2015.

1. What state is your library located in? _____ (dropdown U.S. only)

2. How long has your library offered ebooks?

- ☐ We do not offer ebooks [\[skip to Q 55\]](#)
☐ Less than one year
☐ 1 to 3 years
☐ 4 to 6 years
☐ Longer than 6 years

3a. How many ebooks do you have available in your total collection, including ebooks with shared access through a state or regional consortium?

Please answer for the number of copies, not number of titles.

- ☐ 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 # _____

3b. For comparison, what is the approximate size of your print book collection (number of volumes)? _____

4. Have you experienced a change in demand for adult and children's 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
Adult ebooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YA ebooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children's ebooks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5a. Approximately, what was your total ebook circulation in 2014 (or your last complete fiscal year)?

Total ebook circulation for 2014 _____

5b. What was your total circulation for print materials in 2014?

6. 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? _____ %

7. Do you carry ebooks in languages other than English?

- ☐ Yes, specify primary languages: _____
- ☐ No

8. [If No] If no, why not? (Check all that apply)

- ☐ Non-English language ebooks are not needed at our library
- ☐ Vendor(s) do not provide foreign language ebooks at all
- ☐ Vendor(s) do not provide titles in needed languages
- ☐ Vendor(s) do not provide quality titles in other languages
- ☐ Other, please specify: _____

9. Which three categories of ebooks have experienced the greatest increase in usage in the last year? (Please select up to three answers.)

- | | |
|--|---|
| <input type="checkbox"/> General adult fiction (including backlist) | <input type="checkbox"/> Children's nonfiction |
| <input type="checkbox"/> General adult nonfiction (including backlist) | <input type="checkbox"/> Children's picture books |
| <input type="checkbox"/> Young adult fiction | <input type="checkbox"/> Reference |
| <input type="checkbox"/> Young adult nonfiction | <input type="checkbox"/> Non-English language |
| <input type="checkbox"/> Children's fiction | <input type="checkbox"/> Other |
- (specify) _____

10a. Approximately what percent of the ebooks you have available are fiction titles versus nonfiction titles?**Ebook collection**

_____ % fiction

_____ % nonfiction

10b. How does this compare to your fiction/nonfiction breakdown for print books?**Print book collection**

_____ % fiction

_____ % nonfiction

11. Please approximate the percentage breakdown of adult, children's, and young adult ebooks available in your library:

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

12. What is your library doing to facilitate patron ebook discovery? Check all that apply.

- ☐ E-readalikes in library catalog
- ☐ Book reviews and links on website
- ☐ New book lists on website
- ☐ e-lists on website
- ☐ Articles about ebooks and ebook lists in library newsletter
- ☐ Physical shelf talkers
- ☐ Electronic shelf talkers
- ☐ Readers' advisory online
- ☐ Flyers/Bookmarks
- ☐ Social media book lists and review links
- ☐ Touchscreen browsing in library
- ☐ Kiosks in the community/Ancillary service points (e.g., train station)

- ☐ Refining/expanding metadata
- ☐ Other (specify) _____
- ☐ None of the above

13. Please share your observations about how library users choose the format they wish to borrow (print or electronic)?

14. Are ebooks discoverable through your library's online catalog (general OPAC)?

- ☐ Yes
- ☐ No

15. Do you find that vendor-supplied metadata is accurate and comprehensive enough to aid in ebook selection and discovery?

- ☐ Yes
- ☐ No. If not, what information is commonly missing or inaccurate? _____
- ☐ Don't know

16. Is your online catalog integrated with your ebook provider's site (API integration) to allow patrons to checkout ebook titles directly from the OPAC?

- ☐ Yes, please specify your ILS: _____
- ☐ Not yet, but planning to allow this
- ☐ No

17. Are patrons able to view their print book and ebook checkout histories together?

- ☐ Yes
- ☐ Not yet, but planning for this
- ☐ No

18. Do you offer a "Buy Now" option as an alternative for patrons to purchase content rather than wait on a holds queue?

- ☐ Yes
- ☐ Not yet, but planning to offer this
- ☐ No

19. Do you have a set holds-to-copy ratio for reordering ebooks?

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

20. Is there a process in place for patrons to make ebook title recommendations for library purchase?

- ☐ Yes, on the ebook platform
- ☐ Yes, on the library's website
- ☐ Yes, a form in the library
- ☐ No official process
- ☐ Other, please specify: _____

21. Are ebook borrowers allowed to 'return' ebooks before their due date?

- ☐ Yes
- ☐ Sometimes, not all of our ebook platforms allow for this

- ☐ Not yet, but planning for this
☐ No

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

- ☐ Yes, for in-library use only
☐ Yes, for take home use
☐ Not currently, but considering [\[skip to Q26\]](#)
☐ No and no plans to acquire [\[skip to Q26\]](#)

23. [\[If Yes\]](#) Which ereading device(s) does your library currently have available for borrow? Check all that apply.

- | | |
|---|--|
| <input type="checkbox"/> 3M ereaders | <input type="checkbox"/> NOOK |
| <input type="checkbox"/> Galaxy tablet | <input type="checkbox"/> NOOK Color |
| <input type="checkbox"/> iPad or iPad mini | <input type="checkbox"/> NOOK tablet |
| <input type="checkbox"/> Kindle | <input type="checkbox"/> Sony Reader |
| <input type="checkbox"/> Kindle Fire tablet | <input type="checkbox"/> Other tablet |
| <input type="checkbox"/> Kobo Reader | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Nexus tablet | |

24. [\[If Yes\]](#) 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

25. [\[If Yes\]](#) Does your OPAC include ereading devices in search results?

- ☐ Yes
☐ Not yet, but planning to include this
☐ No

26. Of the library's ebooks that were read in the last year, what percent would you estimate were downloaded and what percent were read online? Answers should add to 100%

_____ % downloaded
 _____ % read online

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

- ☐ Too few titles available
☐ Difficult to find/discover
☐ Long wait times/Not enough copies of popular titles
☐ Too complicated to access
☐ Limited access to e-reading devices
☐ Users prefer print or other format
☐ Registration and password requirements for different ebook platform(s)
☐ Much easier to buy or borrow ebooks elsewhere
☐ Cannot renew ebooks
☐ Unaware of ebook availability
☐ The titles we have are unpopular
☐ Ebooks not always compatible with patron's devices
☐ Vendor's ebook app often needs updating

☐ Other (specify) _____

28. How often do patrons express 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."					
"Why can't I renew library ebooks or keep them late and pay a fine?"					
"Why can't I return my library ebooks before the due date, to ease wait times for others?"					
"I've written an ebook I'd like the library to carry."					

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

- ☐ Yes
☐ No (If No, skip to q52)

30. 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: _____

31. Are ebook selectors at your library the same people as the print book selectors?

- ☐ Always
☐ Sometimes
☐ Never

32a. From which vendor(s) does your library acquire ebooks? (Check all that apply)

32b. Which is your preferred ebook vendor and why?

	Q32a. Ebook vendor(s) used	Q32b. Most Preferred ebook vendor
3M Cloud Library	<input type="checkbox"/>	<input type="checkbox"/>
Amazon.com	<input type="checkbox"/>	<input type="checkbox"/>
Baker & Taylor Axis 360	<input type="checkbox"/>	<input type="checkbox"/>
Barnes & Noble	<input type="checkbox"/>	<input type="checkbox"/>
BiblioBoard	<input type="checkbox"/>	<input type="checkbox"/>
Books24x7	<input type="checkbox"/>	<input type="checkbox"/>
Brain Hive	<input type="checkbox"/>	<input type="checkbox"/>
Ebrary	<input type="checkbox"/>	<input type="checkbox"/>
EBSCO	<input type="checkbox"/>	<input type="checkbox"/>
eSebco	<input type="checkbox"/>	<input type="checkbox"/>

Freeding	<input type="checkbox"/>	<input type="checkbox"/>
Gale Virtual Reference Library	<input type="checkbox"/>	<input type="checkbox"/>
Infobase eBooks	<input type="checkbox"/>	<input type="checkbox"/>
Ingram/MyiLibrary/Coutt's	<input type="checkbox"/>	<input type="checkbox"/>
Odilo	<input type="checkbox"/>	<input type="checkbox"/>
OneClick Digital	<input type="checkbox"/>	<input type="checkbox"/>
OverDrive	<input type="checkbox"/>	<input type="checkbox"/>
Project Gutenberg	<input type="checkbox"/>	<input type="checkbox"/>
Safari Books Online	<input type="checkbox"/>	<input type="checkbox"/>
Total Boox	<input type="checkbox"/>	<input type="checkbox"/>
TumbleBooks	<input type="checkbox"/>	<input type="checkbox"/>
Directly from publisher	<input type="checkbox"/>	<input type="checkbox"/>
Directly from author/Self-published	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
No Preference		<input type="checkbox"/>

33c. Briefly, why did you name that company as your preferred vendor?

34. How helpful are ebook vendors' "recommend for purchase" lists to you?

- ☐ Very helpful
☐ Helpful
☐ Somewhat helpful
☐ Not too helpful
☐ Not at all helpful

35. If "Not too" or "Not at all helpful", why not?

36. Thinking about the following common complaints about ebooks, which ONE is your biggest complaint?

- ☐ Too many ebook platforms available. We need one integrated platform.
☐ Downloading process for ebooks is too complicated for patrons
☐ Ebook pricing is too high
☐ Licensing models are different for each vendor
☐ Other, please specify: _____

37. 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 – single user
☐ Purchase with perpetual access – multi user
☐ Purchase with perpetual access through self-hosting (local ownership)
☐ Subscription
☐ Pay as you go/Pay-per-use (\$1 per circ, for instance)
☐ License with set # of circs model
☐ License with a finite time limit (e.g., 1 year)
☐ Mixed license with either a set # of circs or finite time limit, whichever comes first
☐ Simultaneous use/access
☐ Bundled with other content

- ☐ Patron-driven acquisition
- ☐ Upfront purchase with maintenance fee
- ☐ Other (specify)_____

38. If you had to choose one, which ebook purchasing term would you most prefer? If it is not listed below, please write in an answer.

- ☐ Purchase with perpetual access – single user
- ☐ Purchase with perpetual access – multi user
- ☐ Purchase with perpetual access through self-hosting (local ownership)
- ☐ Subscription
- ☐ Pay as you go/Pay-per-use (\$1 per circ, for instance)
- ☐ License with set # of circs model
- ☐ License with a finite time limit (e.g., 1 year)
- ☐ Mixed license with either a set # of circs or finite time limit, whichever comes first
- ☐ Simultaneous use/access
- ☐ Bundled with other content
- ☐ Patron-driven acquisition
- ☐ Upfront purchase with maintenance fee
- ☐ Other (specify)_____

39. What percentage of your licensed ebooks would you estimate get reordered when their license expires? _____

40. When a license period is over, what is most influential on your decision to renew an electronic title? Please select up to two answers.

- ☐ Prior circulation
- ☐ Holds queue
- ☐ Forthcoming book by same author
- ☐ Continuing high demand
- ☐ Subject popularity
- ☐ Collection building in that subject
- ☐ Cost
- ☐ Other, please specify:_____

41. Have you ever weeded your ebook collection?

- ☐ Yes
- ☐ No, but we probably should
- ☐ No, weeding is unnecessary at this point
- ☐ Other, please specify:_____

42. Does your library purchase and/or license ebook originals or self-published ebooks?

- ☐ Yes, we currently offer e-originals or self-published ebooks
- ☐ No, but we plan to
- ☐ No, and no plans

43. [If No] Why do you not offer ebook originals/self-published ebooks? Check all that apply.

- ☐ We are in the process of adding them
- ☐ We are interested in self-published ebooks, but not sure how to host them

- ☐ No reliable reviews are available
☐ No time to read and evaluate
☐ Content is poor quality
☐ Other, please specify: _____

44. [If Yes in Q42] What triggers your decision to carry a self-published ebook or ebook original? Check all that apply.

- ☐ Patron driven acquisition
☐ Meeting the author
☐ Local author
☐ Local setting
☐ Subject interest
☐ Review
☐ Personally reading the ebook
☐ Other, please specify: _____

45. [If Yes in Q42] What platform(s) do you use for self-published ebooks? Check all that apply.

- ☐ 3M Cloud Library
☐ INscribe Digital
☐ OverDrive
☐ Self-E
☐ Smashwords
☐ Other, please specify: _____

46. 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In 5 years	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

47. Is your library a member of a consortium license program for its ebook collection?

- ☐ Yes
☐ No, but planning to join one
☐ No, and no plans to join one

48. How many ebook volumes did your library purchase or license (independent of consortium-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 # _____

49. Approximately how much did your library spend on ebooks, exclusive of consortium costs, 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

50. Have you reallocated funds from other areas of your budget to pay for ebooks?

- ☐ Yes
- ☐ No

51. 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: _____

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

53. In addition to ebooks, does your library offer any of the following econtent?

- ☐ Downloadable audiobooks
- ☐ Downloadable magazines
- ☐ Streaming video
- ☐ Streaming audiobooks
- ☐ Other, please specify: _____
- ☐ Do not offer any other econtent

54. [if offer other econtent] Which econtent would you say is currently gaining in popularity the fastest at your library?

- ☐ Ebooks
- ☐ Downloadable audiobooks
- ☐ Downloadable magazines
- ☐ Streaming video
- ☐ Streaming audiobooks
- ☐ Other, please specify: _____

(After answering, skip to Question 57.)

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

55. Why doesn't your library offer ebooks? Check all that apply.

- ☐ 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)_____

56. 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

57. 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)_____

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

- | | |
|---|--|
| <input type="checkbox"/> Less than 10,000 | <input type="checkbox"/> 100,000 – 249,999 |
| <input type="checkbox"/> 10,000 – 24,999 | <input type="checkbox"/> 250,000 - 499,999 |
| <input type="checkbox"/> 25,000 – 49,999 | <input type="checkbox"/> 500,000 – 999,999 |
| <input type="checkbox"/> 50,000 – 99,999 | <input type="checkbox"/> 1 million or more |

59. How would you describe the region(s) your library serves? Check all that apply.

- ☐ Urban
- ☐ Suburban
- ☐ Rural

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

- | | |
|--|--|
| <input type="checkbox"/> Library director/Ass't library director librarian | <input type="checkbox"/> Collection devel./Materials selection |
| <input type="checkbox"/> Branch manager/Library manager | <input type="checkbox"/> Acquisitions librarian |
| <input type="checkbox"/> Head librarian/Department head | <input type="checkbox"/> Systems librarian |
| <input type="checkbox"/> Reference/Information Services librarian | <input type="checkbox"/> Circulation/Access services librarian |
| <input type="checkbox"/> Adult/Public services librarian | <input type="checkbox"/> Cataloging librarian |
| <input type="checkbox"/> Children's/Children's services librarian | <input type="checkbox"/> Library administrator |
| <input type="checkbox"/> Youth services librarian/Young adult librarian | <input type="checkbox"/> Paralibrarian |

- | | |
|---|--|
| <input type="checkbox"/> Electronic resources librarian | <input type="checkbox"/> Library aide |
| <input type="checkbox"/> Technical Services librarian | <input type="checkbox"/> Other (please |
| specify) _____ | |
| <input type="checkbox"/> Media/AV librarian | |

61. Are you interested in receiving a report of the findings from this survey?

- ☐ Yes
☐ No

62. Would you like to be included in the drawing to win an Apple iPad mini?

- ☐ Yes
☐ No, thanks

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