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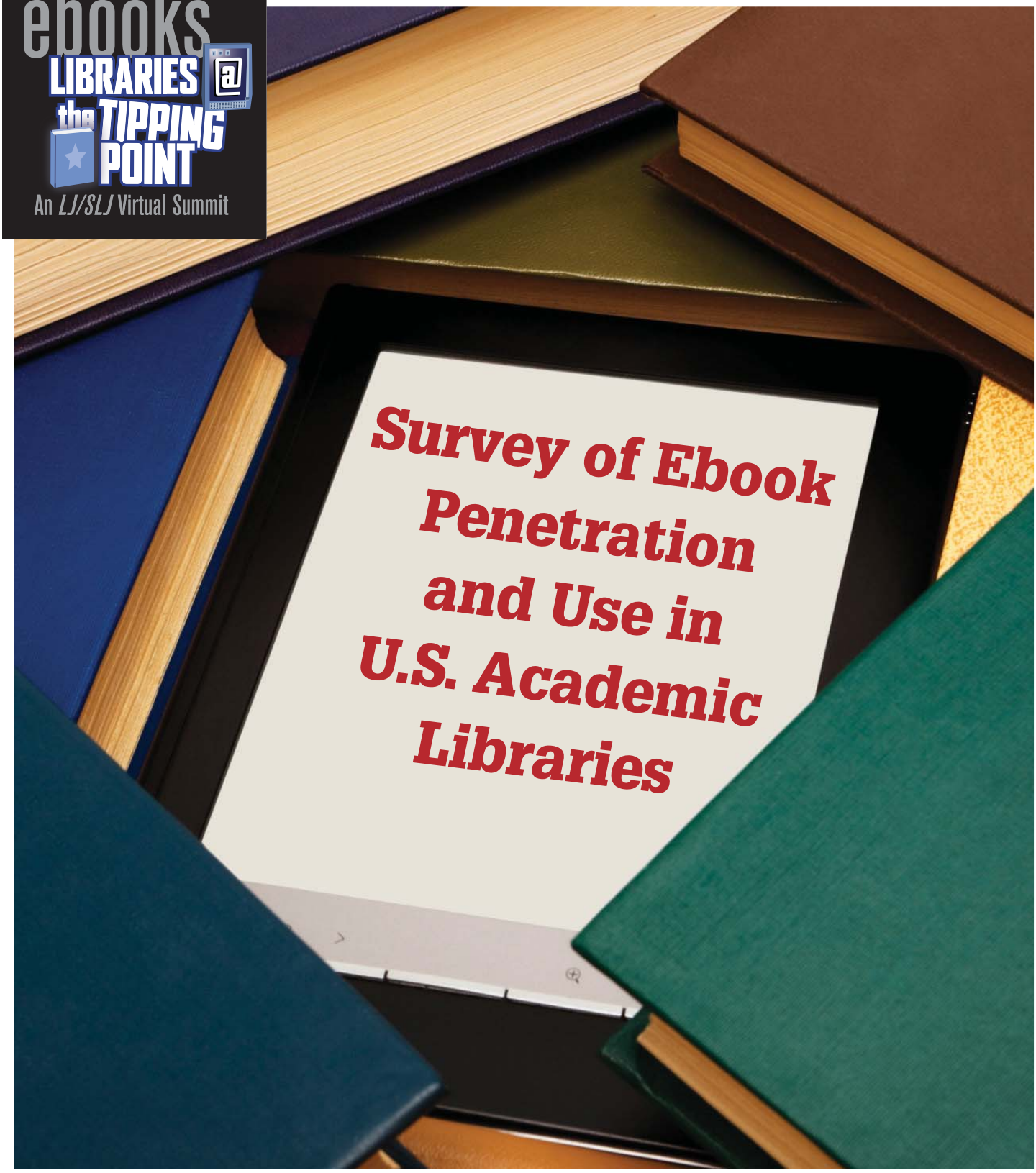

Survey of Ebook Penetration and Use in U.S. Academic Libraries

November 2010

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EXECUTIVE SUMMARY

Electronic books have been around in some form for decades, but it has only been in the last several years that a more or less significant market for them has emerged, driven largely by the introduction of next-generation ebook readers like the Amazon Kindle, the Sony Reader, the Barnes & Noble Nook that have made ereading a convenient, comfortable, and relatively inexpensive activity.

According to Association of American Publishers data, in 2008 ebook sales accounted for approximately 0.5% of all U.S. book sales; a year later, they accounted for 1.3%.[1] At present, ebooks represent a tiny fraction of all book sales, but they are growing. In fact, between 2002 and 2009, ebook sales had a compound annual growth rate (CAGR) of 71%, the highest of any book category. (By way of comparison, adult hardcover books had a CAGR in this same period of 1.3% and adult paperbacks of 2.6%.)

As interest in and a preference for ebooks grows in the culture at large, academic libraries have been ahead of general population trends regarding ebooks and reference materials. Ebooks exist alongside printed books, and serve a variety of needs for library patrons. Electronic reference books can be easier to navigate and search than their printed counterparts, making them favored among student and academic researchers. Ebooks also allow libraries to serve and offer books to remote users—especially helpful for academic libraries that serve institutions that offer distance learning programs. Ebooks also solve some problems for libraries. They don't wear out or get damaged,[2] they can't easily get misplaced and they don't require physical storage.

One of the disadvantages of ebooks, and in fact one of the factors that has impeded ebook adoption in the book-buying/reading population as a whole, is the plethora of mutually incompatible formats and often draconian digital rights management (DRM) schemes.

> "If DRM is necessary, it must be simplified for users. It can be extremely frustrating to users to have to have special software to download a book. Concurrent use is also a problem for us. Limiting this makes it difficult for faculty to include readings in their courses."

Academic libraries have some unique concerns that make them different from other book buyers and ebook users. Academic libraries need to offer journals, monographs, and other research materials, with less of an emphasis on general and popular fiction and nonfiction. Specific types of institutions—law schools, medical schools, etc.—also need to offer a wide array of special interest materials which may or may not be available in electronic form.

At the same time, academic libraries must serve the needs of a diverse population, from students to veteran professors and researchers, users who span the entire

[1] *Association of American Publishers 2009 S1 Report: Estimated Book Publishing Industry Net Sales 2002–2009,* Management Practice, http://publishers.org/main/IndustryStats/indStats_02.htm.

[2] Yes, files can get corrupted, but not as easily as, say, exposing a library book to rain, household pets, and other sources of damage.

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length of the technical literacy spectrum, and who all bring their unique hardware devices to attempt to access library ematerials. Making ebook holdings accessible to all users who want them can be a challenge.

The following data is based on 364 academic libraries from throughout the United States. It comprises 44% graduate/professional level academic libraries, 44% undergraduate libraries, 19% community college libraries and 3% other.

Ebook Collections

Almost all academic libraries (94% of survey respondents) say they currently offer ebooks to users. As for that 6% that currently don't, over half are planning to within the next couple of years.

We plan to offer ebooks...	
In the next 12 months	16%
1 to 2 years from now	32%
Longer than 2 years from now	5%
No plans to offer ebooks	47%

On average, academic libraries that carry ebooks own or subscribe to more than 33,500 ebooks (mean 33,830; median 16,666).

When we ask about the primary driver of ebook purchases, 66% of academic libraries cited "faculty request," with "inclusion in bundles with attractive pricing" at number two (62%), and "usage statistics/projected usage" at 59%. Graduate and professional institutions are most likely to be influenced by faculty requests (73%). The biggest factor influencing undergraduate ebook purchasing is "inclusion in bundles with attractive pricing," while community colleges are split between faculty request and projected usage.

Looking ahead, more than three-fourths (77%) of survey respondents expect ebook circulation to increase next year compared to this school year, while 22% expect it to remain the same. Only 1% expects a decrease in ebook circulation. Overall, our respondents estimate an increase in ebook circulation of 18% next year.

> "Ebook use is growing exponentially in our library. There is tremendous acceptance on the part of our users."

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Ebook Readers and Formats

The personal laptop computer tends to be the hardware device on which academic library users usually read ebooks (84%), followed by the library computer (70%). "Other portable device" (perhaps a smartphone or tablet computer like an iPad) was cited by 22% trailed by 12% noting a dedicated ebook reader. Only 9% of respondents don't know which hardware is preferred.

Device(s) on which library users most often read ebooks...	
Personal laptop/Computer/Netbook	84%
Library computer	70%
Other portable device	22%
Dedicated ebook reader	12%
Don't know	9%
Other	1%

In terms of ebook formats, basic PDF is the top user-preferred format, followed by full-text HTML. The ePub format and ebook formats optimized for mobile devices and dedicated ebook reading devices such as the Kindle are far below this. Graduate level libraries have the highest preference for ebooks in pdf format. Academic journals, articles, and studies are increasingly available online as PDFs or as straight HTML which appears to be what these libraries are considering as "ebooks." We also note that 40% of respondents selected "Don't know." After all, some library users are distance learning students or access a library's collection online.

Preferred ebook format(s) by users...	
PDF	53%
Full text HTML	32%
ePub	16%
Optimized for other mobile device	14%
Optimized for dedicated ebook device	13%
Don't know	40%
Other	2%

The search for a single standard format for ebooks is highly desired by users, libraries, and even publishers. In many ways, all these folks are caught up in every ebook hardware manufacturer's desire to be the one offering that single standard. Each manufacturer offers its own proprietary format that is optimized for its particular reader, and which integrates its unique DRM scheme. Until the market shakes out further and a clear "winner" emerges, publishers and libraries will be required to offer titles in all formats, lest they run the risk of alienating users who can't find the titles they want on the device they prefer. The analogy is the old VHS vs. Beta situation back in the 1980s, when video rental shops were required to stock both formats, until Beta finally lost out. (All for naught, perhaps, because videotapes themselves have since given way to DVDs.)

Do academic libraries circulate actual e-reading devices? Not generally; 62% of academic libraries *do not* circulate preloaded e-readers, while 12% do. About a quarter of academic libraries (26%) are considering it.

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Usage License and Circulation Interval

The publisher is typically the party that determines the usage license, and different publishers have different models, which is why 20% of academic libraries say their license allows only "single ebook use at a time," 20% say "unlimited access/simultaneous use," and the majority (59%) say "both."

Ebook usage license model...	
Single ebook use at a time	20%
Unlimited access/ simultaneous use	20%
Both	59%
Other	2%

Graduate/professional institutions are more likely to have a mix of licensing models (72% selected "both"). Community college libraries are most likely to use an unlimited access/simultaneous usage model (32%).

One to two weeks is, on average, the circulation interval for ebooks among academic libraries, with 26% of respondents citing less than 7 days, 8% citing 7 days, and 14% citing 14 days. Another 23% of respondents allow the user to specify the circulation interval, likely due to "ebooks" being PDF files or HTML pages that don't necessarily circulate in the traditional sense, as well as the fact that the library (or, actually, the publisher) may limit the number of ebooks that can be accessed simultaneously.

Ebook Categories and Disciplines

We asked academic libraries about general subject categories and specific disciplines represented in their ebook collections. The top categories offered are scholarly monographs (89%), non-circulating reference (84%) with general adult nonfiction at a distant 39%. The disciplines currently most represented in academic libraries' ebook collections are social sciences (83%), science (82%), technology (80%) and humanities (77%).

Categories of ebooks library currently offers users...	
Scholarly monographs	89%
Reference (non-circulating)	84%
General adult nonfiction	39%
General adult fiction	18%
Bestsellers	11%
Other	8%

Disciplines for which library currently offers ebooks...	
Social Sciences	83%
Science	82%
Technology	80%
Humanities	77%
Medicine	69%
Law	51%
Other	50%

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