2012
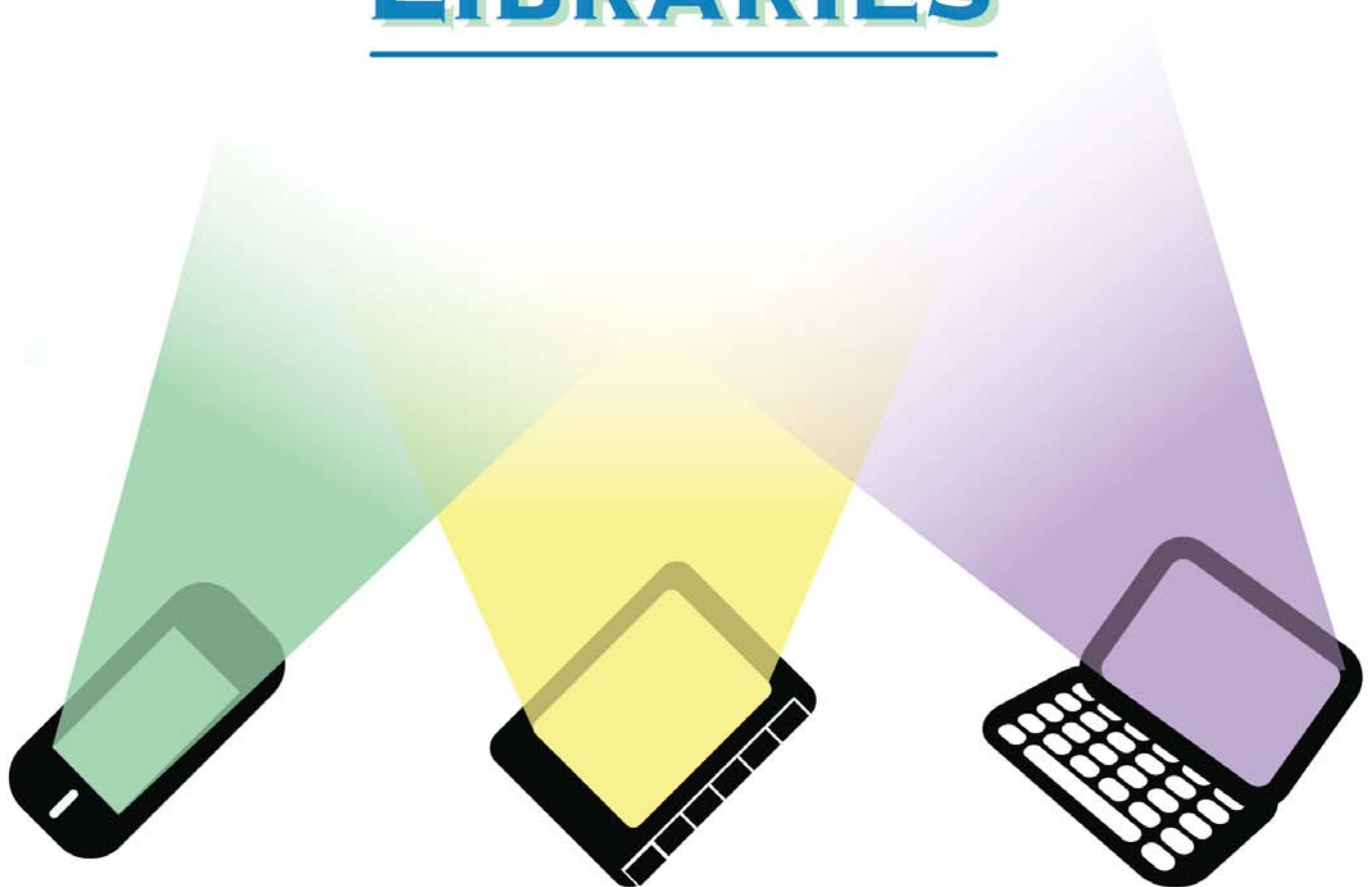
EBOOK USAGE IN U.S. SCHOOL (K-12) LIBRARIES

THIRD ANNUAL SURVEY

SPONSORED BY:

Follett

library | classroom | early learning

RESEARCH
LIBRARYJOURNAL / School Library Journal

Survey of Ebook Usage in U.S. School Libraries

Table of Contents

EXECUTIVE SUMMARY

School libraries have specialized roles that differ from higher-level academic libraries and public libraries. For younger students, developing and nurturing an interest in reading is a crucial purpose of a school library. As students get older, teaching them how to use research materials and complete academic assignments gains in importance. The library must also serve as a repository for those research materials, with ease of use and access. An often overlooked capacity in school libraries is technology expertise. As the technology available for research constantly changes, librarians are there to help middle and high school students learn about new devices and get familiar with the tools they are likely to encounter in academic libraries in college.

This capacity carries beyond the students, as school libraries also function as learning centers for the whole school, providing teachers and administrators with the tools they need to do their jobs.

School libraries lag behind academic and public libraries in adoption of ebooks. Many school libraries are *still* in the earliest stages of adding ebook options for students. This year the 1,427 respondents to our survey have experienced modest expansion in that direction, even if the total percentage of school libraries carrying ebooks still falls well behind the more advanced stages of public and academic libraries.

It is also no secret that budget issues are a very large part of what is holding school libraries back—even more so than in other types of libraries. As this survey also found, other challenges and barriers abound.

Ebook Collections

Most school libraries were not early to adopt ebooks: on average, they have only been carrying ebooks for 1.3 years, with 22% of respondents having only been offering ebooks for less than a year.

Unlike other libraries, the majority of school libraries (60%) *do not* offer ebooks. This means that 40% do, slightly down from 44% last year, but this could be a sampling issue.[1] It's still above the 33% of school libraries that offered ebooks in our 2010 survey. There is a sense that a brief plateau has been reached as they await more comprehensive device adoption; school librarians are not seeing the overwhelming demand from students that public libraries have been seeing, nor do they have the budget to invest as heavily as they might like in new technologies. At the same time, they are frustrated by roadblocks placed by publishers and vendors. Mixing all of these things together reveals a market that is sluggish, comparatively, in its evolution.

---

[1] A considerably larger percentage of respondents in 2012 came from the budget-strapped West, where only 29% of schools carry ebooks. The overall regional breakdown of respondents to this year's survey closely resembles the distribution of schools nationwide, so we feel the 40% is accurate.

Still, the likelihood of a school library carrying ebooks increases by grade level, with 63% of high school libraries, 50% of middle schools, and 33% of elementary schools currently offering them.

There are also good signs that more libraries are poised to join the ebook market. Of those libraries that do *not* currently offer ebooks (60% of all school libraries), 26% say they will definitely purchase ebooks to add to their collections in the next two years, while the majority—55%—*may* purchase them, but it's not a priority. Only 9% have ruled out ebook purchasing entirely. With so many states and municipalities under severe budget constraints, especially post-recession, many schools simply don't have the funds to build an ebook collection. In fact, the top reasons for their not carrying ebooks are "lack of ereading devices" and "no money for ebooks."

Where ebooks are offered, they are booming. Among those libraries that *do* offer ebooks, the number of ebooks carried by school library media centers has increased substantially in the past two years, from a mean of 49 in 2010, to 397 in 2011, to 725 in 2012. The size of ebook collections in school libraries rises with grade level, from elementary to high school.

Average # ebooks	Total	Elem-entary	Middle/ Jr. High	High School
2010	49	45	47	60
2011	397	85	119	365
2012	725	320	435	1,525

In our 2012 survey, we added a question that asked what motivated libraries to initially adopt ebooks, and the top responses were "librarian self-motivated," "to keep up-to-date with technology," and "educational trends/best practices." So while school libraries in general were not early adopters of ebooks, librarians are on top of and are not averse to the latest technology.

Ebook Circulation

Ebook circulation increased to an average of 421 in the 2010–2011 school year, up from 306 the previous year. Circulation increases were most notable in high school and middle school libraries, although elementary school libraries reported a decline in average circulation from the previous year.

Ebook circulation	Total	Elem-entary	Middle/ Jr. High	High School
2009–2010	306	296	379	177
2010–2011	421	90	449	799

Looking ahead, 69% of all survey respondents expect ebook circulation to increase again next year, with an overall projected increase in circulation of 48%.

When asked about the primary drivers of ebook purchases, the top answers were "multiple users allowed at one time," "24/7 offsite access," and "cost." These are the major themes of this year's survey: cost and access to titles. Ebook costs have to be reasonable and affordable, and students need to be able to easily access titles.

Almost one-half (46%) of all respondents have witnessed an increase in demand for ebooks in the past year, even if that increase was not especially "dramatic" (only 9% said they saw a "dramatic" increase in demand). Increased demand for ebooks is highest among middle school users. Just over-fourth of all schools (26%) said they receive no requests for ebooks—this is down substantially from the 58% who said this in our 2011 survey.

Ebook Categories Offered

Children's nonfiction pulled ahead as the top category of ebooks that school library media centers offered users this year. This could be due to the arrival of the Common Core State Standards, which emphasize nonfiction. And, the incidence of children's picture books in elementaries grew wildly from 46% to 67% over one year, which may speak to more publishers getting into the ebook market. Naturally, elementary school collections are more likely to include children's titles, while high school collections emphasize reference titles. For middle schools, middle grade fiction and nonfiction top their collections.

Ebook Categories Currently Offered			
	Elem.	*Middle*	*High*
2012			
Children's nonfiction	82%	13%	3%
Children's fiction	72%	15%	4%
Children's picture books	67%	13%	4%
Reference ebooks	13%	42%	79%
Middle grade fiction	18%	65%	8%
Classic literature	13%	35%	44%
Young adult fiction	3%	40%	49%
Middle grade nonfiction	14%	59%	6%
Young adult nonfiction	3%	32%	47%
Textbooks	1%	3%	4%

The following ebook categories were most in-demand by students:

Elementary school top in-demand ebook categories:
- Children's nonfiction (64%)
- Children's fiction (52%)
- Children's picture books (50%)

Middle school top in-demand categories:
- Middle grade fiction (58%)
- Young adult (37%)
- Middle grade nonfiction (23%)

High school top in-demand categories:
- Reference ebooks (57%)
- Young adult (47%)
- Young adult nonfiction (29%)

Ebook Readers and Formats

Among school library users, the vast majority of ebook titles (78%) are viewed online, while only 22% are downloaded. This may be partially driven by the increasing popularity of cloud-based access models.

As for what device(s) users employ to access ebook content, laptops, PCs and netbooks are still the top devices (however we can't differentiate this year whether these are school owned or student owned). Interactive whiteboards and tablets debut on the list at 41% and 40% respectively. Dedicated ebook readers continue to see robust growth, jumping to 34% from 9% two years ago, especially as "bring your own device" (BYOD) becomes more and more popular in schools that allow use of mobile/portable devices by students. Librarians are reporting that smartphones or other mobile devices (20%) are also being used as ebook readers.

Device(s) on which library users most often read ebooks...	*2010*	*2011*	*2012*
Laptop, PC or Netbook	52%	54%	81%
Interactive whiteboards	n/a	n/a	41%
Tablet	n/a	n/a	40%
Dedicated ebook reader	9%	21%	34%
iPod Touch or similar	n/a	n/a	20%
Smartphone or other mobile device	n/a	n/a	19%
Don't know	9%	13%	6%
Other	6%	4%	0%
Other portable device	13%	14%	n/a
Library/classroom computer	72%	56%	n/a

Librarians estimate that about 40% of the ebooks read on dedicated ereaders are read on student-owned devices. But media specialists in general, and especially in less affluent areas, are concerned about providing ebooks for students who don't have access to ereaders. To help address this device gap, 25% of schools currently circulate ereading devices, and a further 39% are considering it. Naturally, cost is a big barrier, as is the risk of lost or damaged ebook readers.

Libraries that do circulate ereaders have an average of 17 devices on hand and overwhelmingly prefer Amazon's Kindle, with the Nook falling out of favor somewhat since the last survey.

Of those libraries that do circulate physical ereaders, three-fourths of them (especially elementary school libraries) preload ebooks on them, which helps with downloading and other technical issues. Some libraries circulate tablets like the iPad, and almost two-thirds of those that do add special apps or enhanced ebooks for the benefit of students and/or teachers.

"After a grant-funded makeover I will be better able to advertise and create buzz about e-books. I am seeing more students also with ereaders and iPads during independent reading time. I think that after a very slow start this next year will be the year of the e-book!"

Barriers to Ebook Consumption

"Limited access to ereading devices" gets the dubious honor of being the new number one barrier to ebook consumption by school library users. Last year's top barrier—"[students] unaware of ebook availability"—drops 10 percentage points to 38%, and is down substantially from 64% in 2010." This year, we added "too few titles available" and it was selected by 40% of respondents. "In demand titles not in ebook format for libraries" rises to 27%. Interestingly, "users prefer print books" is up from 22% to 26%.

> "Despite the drive from administration to create a digital library collection, the majority of our students would rather hold a printed book and read it rather than read on their iPads. A lot of students admit that the iPad poses a major distraction to reading and they are able to focus better when holding an actual book."

Ebook Budgets and Purchasing Terms

On average, respondents estimate they spent $1,200 on ebooks in the current school year, up $200 from last year. This represented 2.2% of materials budgets, doubling from 1.1% the previous year. School library respondents feel that in five years, ebooks will represent 6% of their total materials budget—a bearish sentiment, as in last year's survey they felt that ebooks would represent 8% of their materials budget in five years' time.

Projected to the entire school universe (and accounting for schools that do not carry ebooks), an estimated $42 million was spent on ebooks in U.S. schools in the 2011–2012 school year. Schools are tentatively entering the ebook market, and budgets are decidedly finite (and shrinking). Still, librarians are finding some unique ways of funding the expansion of their ebook collections—grants, book fairs, and other fundraising initiatives.

When libraries purchase ebooks, more often than not (66%, up from 63% last year and up from 54% in 2010) they purchase "perpetual access." The option for "concurrent use/access" continues to grow, from 16% to 30% (it was 5% in 2010). Multiple access is a big issue for school libraries. "Subscription" continues to decline in popularity. On the other hand, "patron-driven acquisition," a popular option in other types of libraries, is utilized by under 10% of school libraries but is slowly growing, especially in high school libraries.

> "I am not happy about the current licensing and pricing of ebooks. We are unwilling to devote so much of our budget to materials we cannot own."

Libraries and Their Vendors

FollettShelf remains the top vendor tapped by elementary and middle school libraries for ebooks, with Gale Virtual Reference Library slightly ahead for high schools. Buying ebooks directly from the publisher is falling out of favor across the board.

Vendors Used to Purchase Ebooks			
	Elem.	*Middle*	*High*
2012			
FollettShelf	76%	67%	59%
Gale Virtual Reference Library	2%	25%	60%
Tumblebooks	20%	10%	5%
Amazon.com	7%	17%	19%
Barnes & Noble	10%	17%	11%
Mackin	11%	3%	5%
Capstone	10%	5%	2%
OverDrive	3%	11%	12%
EBSCOhost	2%	7%	13%
Scholastic	8%	5%	0%
iTunes	4%	6%	5%
Direct from publisher	2%	6%	11%
Baker & Taylor	3%	3%	3%
Other	10%	10%	19%

FollettShelf is the preferred vendor for all school levels. Like most other libraries (public and academic) surveyed, 27% said "no preference," although this is down from 38% last year.

> "It is important to our school to have "ownership" of the ebook. OverDrive is an ebook rental service. You lose the books when you no longer pay their fees. With Follett, I purchase the ebook and keep it. This model is important to me in future decision making. Viewing on as many devices as possible is also important."

The most important attribute of ebooks for school libraries is, as ever, "fair price"—this was either very important or important for nearly every respondent to this survey. "Wide selection of titles and formats" and "customer service" were also vital.

A major theme of this year's survey has been cost, and the challenge of growing ebook adoption and collections on paper-thin budgets. To what extent do school librarians think that vendor discounts have helped? A full 69% of respondents said they were at least "satisfied" with ebook discounts, while a further 7% were "very satisfied." Almost one-fourth, though, were "dissatisfied," with a further 2% considering themselves "very dissatisfied."

> "I don't think we receive any discounts. Fiction prices have skyrocketed from some publishers through our ebook vendor so we just don't buy much."

Conclusions

When compared to other types of libraries, school libraries are still the early stages of ebook adoption, and are wary about moving forward. Librarians wrestle with whether they should be leading their students into learning new technologies or simply responding to their current needs. Unlike other libraries surveyed, demand has been underwhelming. School librarians generally like the idea of ebooks and eagerly stay up-to-date with the technology, but they're hamstrung by tight and often shrinking budgets. Without some cooperation from vendors and publishers on access and price, it's entirely possible that ebooks will languish in the school library channel.

If ebooks are the "new normal" in academic and public libraries, they're still the abnormal in school libraries. Can they become the "new normal"? Possible, but it will be a very fragile normal. Ebooks can be a robust growth area for school libraries and publishers, but it will need to be carefully nurtured.

"Marketing ebooks to Web surfers is harder than wrassling an oiled pig out of a slime pool, and I should know. I've tried both."

INTRODUCTION

About the *Library Journal* Ebook Survey

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

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

Our most recent survey reprises many questions from last year's survey—allowing us to track long term trends more effectively, as we now have three data points to consider. We tweaked some other questions based on responses to past surveys or to better reflect changes in the market, so some data points may not be entirely consistent with past responses. And, of course, we added some brand new questions this year.

As always, we invited survey respondents to answer open-ended questions that asked about school libraries' experience with ebooks in general, as well as how libraries manage the distribution of ereading hardware devices to users and how they maintain those devices. We also asked an open-ended question about discounts and pricing, which is illuminating. These verbatim responses are a useful lens through which to view the quantitative results of our survey, and provide a useful "fly on the wall" perspective of what the ebook situation is for libraries.

The twin themes to watch for throughout this report are "cost" and "ebook access," the two major challenges for school librarians.

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

The methodology and questionnaire are included in the Appendix.

Structure of the Report

Each section of this report is laid out in basically the same way, each of which provides various levels of detail. The bulk of each chapter provides top-level survey results in chart form—in essence, the "all responses" results, or what all libraries surveyed said about a specific question. This gives an overall idea of the prevailing attitude.

Many charts include both the 2012 and 2011 responses to the question, for quick comparison. In some cases, we altered the phrasing of the question or changed the response selection, so direct comparison is not entirely possible. In those cases, we have presented the 2011 data in a separate chart. In some other cases, basic chart legibility precluded inclusion of the 2011 data series. In those cases, we also opted to add the 2011 data as a separate chart. Also in the interest of legibility and

clarity, we have called out in commentary where the 2010 data demonstrated a clear trend. We have made these decisions on a question-by-question basis.

Each chart is followed by a corresponding table that breaks down the survey responses by type of school library (elementary, middle, or high school), whether it is public or private, and geographic region. (We include both 2012 and 2011 data for those who want to compare the entirety of both datasets.) In previous reports, we had cross-tabulated by materials budget, but a disproportionate number of respondents this year came from the cash-strapped Western states, so we felt it more useful to see where certain regions were "pulling" the overall data.

Different sizes and types of libraries have varying attitudes and behaviors and it's a mistake to assume that all libraries think and act alike. An elementary school library will have a different set of needs and attitudes and be subject to different forces than a high school library.

For More Information

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

1. PROFILE OF RESPONDENTS

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

Type of Library

As the chart below shows, 66% of the school libraries responding to this questionnaire described themselves as an "elementary school," 14% "high school" and 11% "middle/junior high school." We also caught a small number of other types of schools (generally schools that teach a mix of lower to upper grades) as well as administrative offices. The preponderance of elementary schools also allows this survey to be somewhat predictive of middle and high school trends in the next few years as kids move up through the grades and take their ebook experiences and preferences with them.

Figure 1. Which of the following best describes your library?
% of school libraries
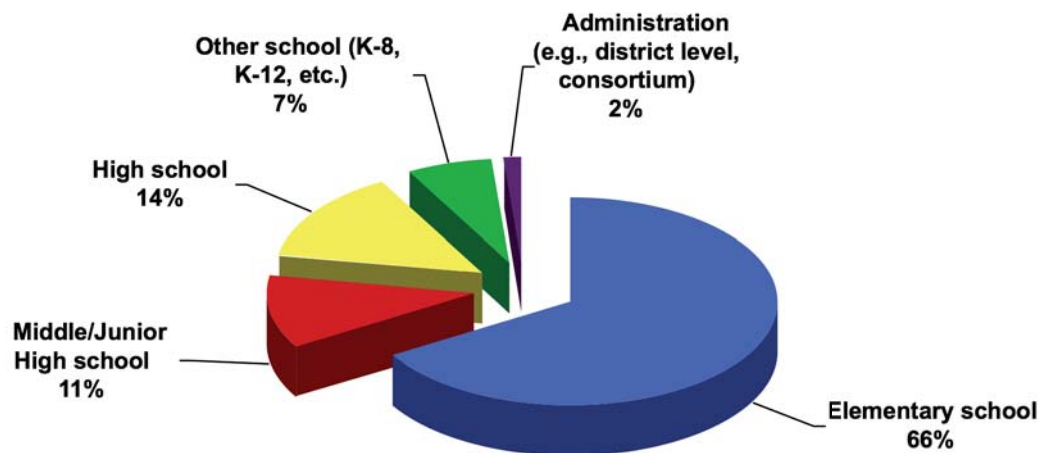
The table below breaks the data down by geographic region.

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

	Midwest	*Northeast*	*West*	*South*
Elementary school	63%	61%	68%	71%
Middle/Junior High school	10%	15%	10%	11%
High school	16%	17%	12%	12%
Other school (K-8, K-12, etc.)	9%	7%	7%	5%
Administration (e.g., district level, consortium)	2%	0%	2%	1%

Public or Private

The majority (90%) of respondents to our survey were public schools, while 9% were private schools.

Figure 2. Is your institution public or private?
% of school libraries
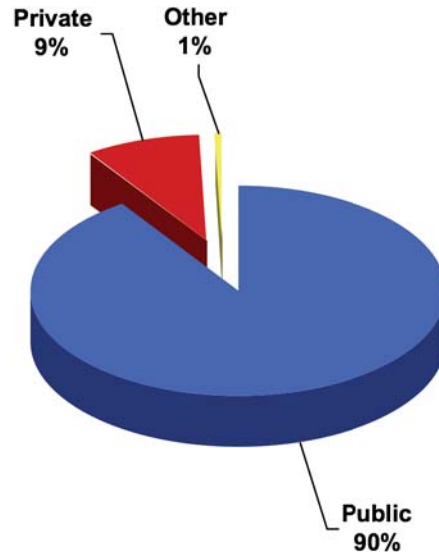
The following table breaks the public/private data down by type of institution and geographic region.

Table 2: Is your institution public or private?
% of school libraries by type of school and geographic region

	Type of School			Geographic Region			
	Elem.	*Middle*	*High*	*Midwest*	*Northeast*	*West*	*South*
Public	94%	96%	85%	89%	90%	91%	91%
Private	6%	3%	15%	11%	10%	8%	8%
Other	0%	0%	0%	0%	0%	0%	1%

Number of Students

School libraries responding to our survey have an average (mean) of 697 students in their school (median 553).

Figure 3. Approximately how many students attend the school you work in?[2]
% of school libraries
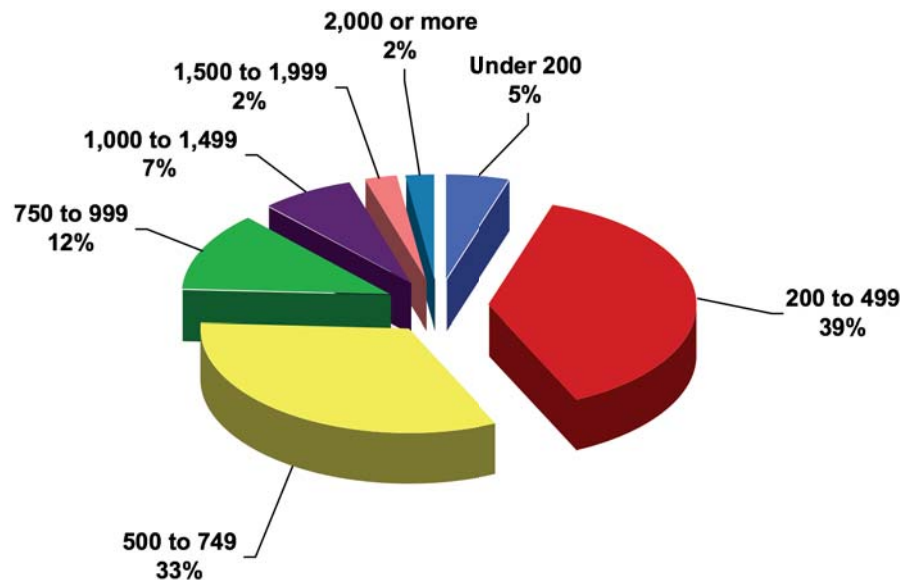
Table 3. Approximately how many students attend the school you work in?
% of school libraries by type of school and geographic region

	Type of School			Geographic Region			
	Elem.	Middle	High	Midwest	Northeast	West	South
Under 200	5%	2%	3%	4%	3%	5%	6%
200 to 499	44%	26%	19%	49%	38%	33%	35%
500 to 749	38%	30%	15%	28%	31%	40%	31%
750 to 999	10%	25%	15%	7%	13%	11%	17%
1,000 to 1,499	3%	15%	21%	7%	11%	7%	6%
1,500 to 1,999	0%	1%	14%	2%	2%	2%	3%
2,000 or more	0%	0%	13%	3%	2%	2%	2%
Mean	532	720	1,136	717	664	643	740
Median	507	679	965	477	571	575	574

---

[2] The survey question included the qualification, "If you work in more than one school or at the district level, please answer for the total number of students you serve."

SPONSORED BY:
                                                    Follett Library Resources

Materials Expenditure

The mean materials expenditure for the 2011/2012 school year for school libraries responding to our survey was $6,900 (median expenditure was $4,400). This is down dramatically from the mean materials expenditures reported in our last survey for the 2010–2011 school year[3]. Eighteen percent of respondents reported that their total materials expenditure for the year was under $2,500, while 5% reported that their total expenditure was over $20,000.

Figure 4. What was your library media center's total materials expenditure this past year (2011–2012 school year)?
% of school libraries
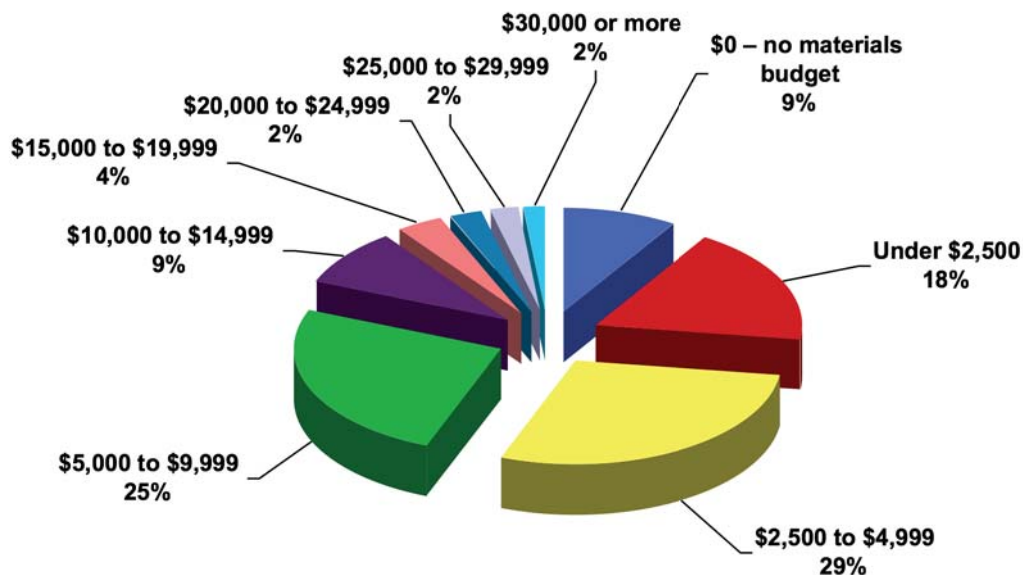
Table 4. What was your library media center's total materials expenditure this past year (2011–2012 school year)?
% of school libraries by type of school

	Elem.	Middle	High	Public	Private
$0 – no materials budget	9%	7%	8%	9%	8%
Under $2,500	22%	13%	6%	18%	14%
$2,500 to $4,999	32%	24%	15%	28%	25%
$5,000 to $9,999	27%	32%	19%	27%	11%
$10,000 to $14,999	7%	15%	14%	9%	9%
$15,000 to $19,999	2%	6%	12%	4%	9%
$20,000 to $24,999	1%	2%	8%	2%	5%
$25,000 to $29,999	1%	2%	8%	2%	7%
$30,000 or more	0%	1%	9%	1%	13%
Mean ($000)	5.2	7.6	14.2	6.6	13.4
Median ($000)	3.9	6.1	10.4	4.4	6.4

---

[3] Mean materials expenditure: $9,400. Median materials expenditure: $7,500.

Library Location

The following figure shows 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 5. In which region of the country is your library located?
% of school libraries

SPONSORED BY:
Follett Library Resources
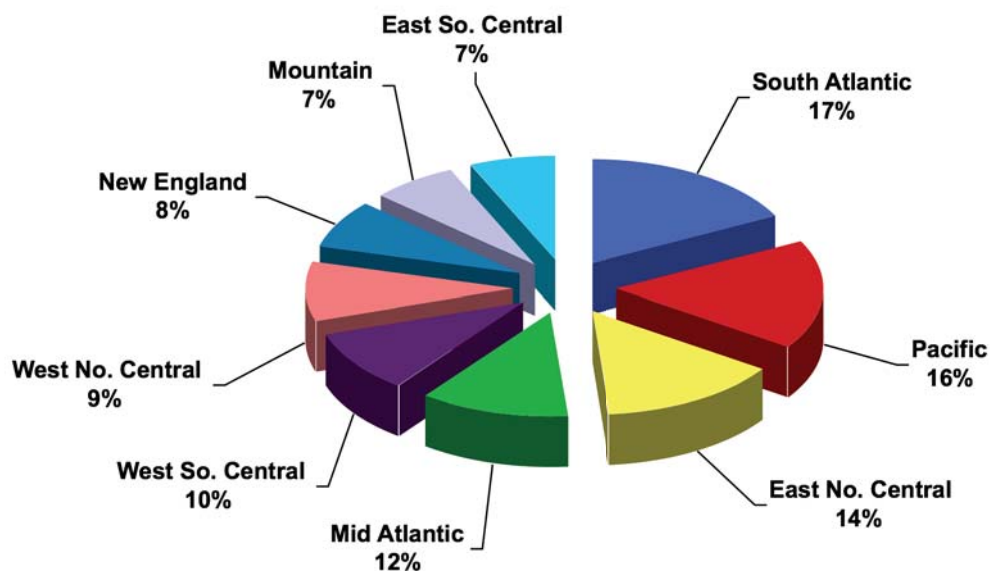
As Table 5 shows, these two regions have the lowest overall materials budgets which had the effect of skewing some of our data. We will comment specifically where we think our sample affected overall survey results.

SOUTH	34%
WEST	24%
MIDWEST	23%
NORTHEAST	19%

Table 5. In which region of the country is your library located?
% of school libraries by type of school and materials expenditure

	Type of School			*Public or Private*		*2011–2011 Materials Budget*			
	Elem.	*Middle*	*High*	*Public*	*Private*	*<$5K*	*$5K–$9K*	*$10K–$24K*	*$25K+*
South Atlantic	19%	17%	16%	18%	15%	15%	18%	20%	8%
Pacific	18%	16%	14%	17%	19%	22%	11%	7%	16%
East No. Central	13%	14%	17%	14%	17%	14%	15%	19%	17%
Mid Atlantic	10%	15%	15%	12%	11%	7%	17%	21%	17%
West So. Central	10%	12%	10%	10%	7%	11%	7%	9%	17%
West No. Central	9%	6%	9%	9%	8%	9%	12%	7%	6%
New England	8%	10%	8%	7%	12%	6%	9%	7%	14%
Mountain	6%	6%	7%	7%	3%	8%	5%	7%	2%
East So. Central	8%	4%	4%	7%	7%	7%	5%	2%	5%
SOUTH	36%	33%	30%	34%	29%	33%	30%	31%	29%
MIDWEST	22%	20%	26%	23%	25%	23%	28%	26%	23%
NORTHEAST	18%	25%	23%	19%	23%	13%	27%	28%	30%
WEST	24%	22%	21%	24%	22%	31%	16%	14%	17%

Respondent Job Title/Ebook Recommendation Authority

Most of the respondents to our survey gave their job title as library media specialist (46%) or teacher librarian (24%). Sixteen percent described themselves simply as "librarian."

Figure 6. Which of the following comes closest to your job title?
% of school libraries
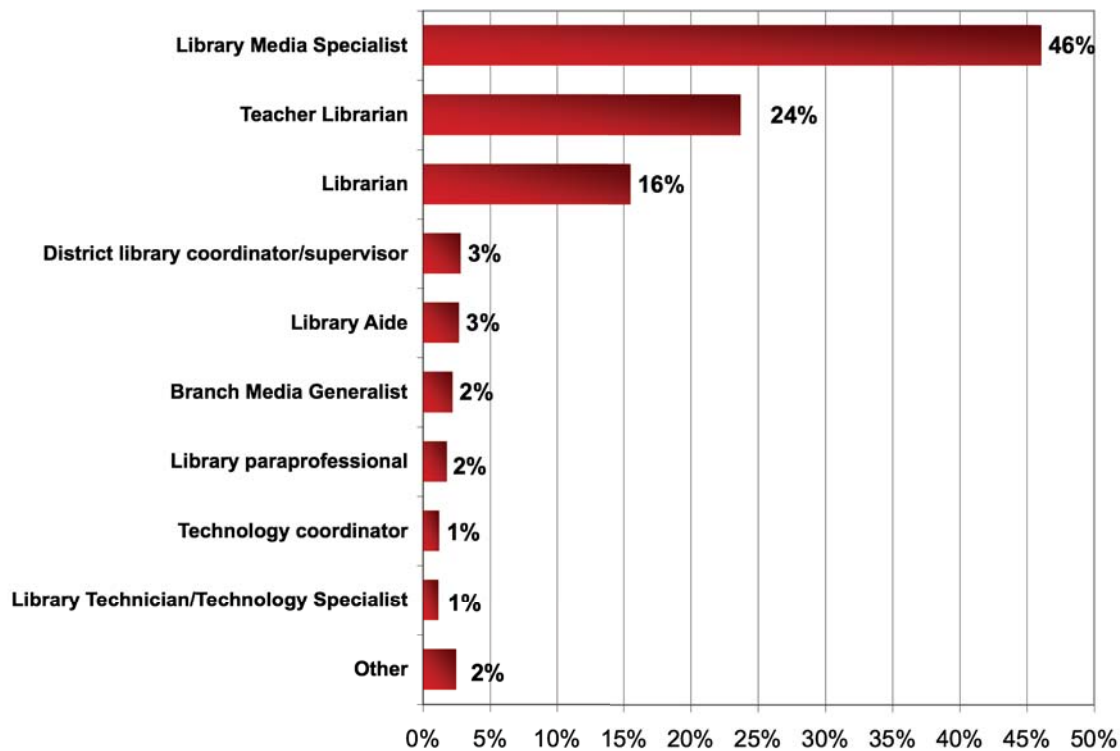
Table 6. Which of the following comes closest to your job title?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Library Media Specialist	47%	48%	47%	48%	24%	47%	53%	24%	56%
Teacher Librarian	23%	27%	24%	24%	25%	23%	24%	30%	19%
Librarian	15%	16%	16%	13%	36%	11%	16%	15%	19%
District library coordinator/supervisor	1%	2%	3%	3%	2%	6%	1%	4%	1%
Library Aide	3%	2%	3%	3%	2%	2%	1%	6%	2%
Branch Media Generalist	2%	1%	3%	2%	4%	3%	1%	5%	1%
Library paraprofessional	2%	1%	0%	2%	0%	2%	0%	4%	1%
Technology coordinator	1%	1%	1%	1%	1%	2%	0%	3%	0%
Library Technician/ Technology Specialist	1%	1%	0%	1%	0%	0%	0%	5%	0%
Library director	0%	0%	1%	0%	4%	1%	1%	0%	0%
Other	3%	2%	2%	2%	2%	2%	2%	4%	2%

Ebook Purchase/Recommendation Authority

The vast majority of respondents (97%) are involved in the ebook purchasing or recommendation process.

Figure 7. Do you have a role in making purchasing recommendations/ decisions for ebooks in your school?
% of school libraries
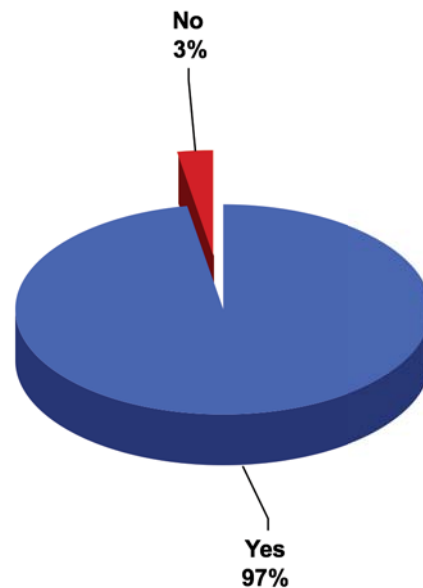
Table 7. Do you have a role in making purchasing recommendations/decisions for ebooks in your school?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
Yes	97%	96%	98%	97%	97%	99%	99%	96%	95%
No	3%	4%	2%	3%	3%	1%	1%	4%	5%

Onward

Our sample of school libraries skews heavier than last year toward the South and West, however it represents an accurate distribution of school locations throughout the U.S. Schools in those regions have some of the smallest reported materials budgets. School budgets across the country have taken a hit since the recession hit in 2008, with four-day school weeks, program elimination, and even entire departments dissolved.[4] That school libraries lack the resources to invest in a whole new book technology is an understatement. Yet, some are managing.

Our survey includes a very large percentage of ebook decision makers. The survey sample of libraries offering ebooks is generally comparable in profile to last year's sample (save for geographic distribution), making comparisons reasonably valid.

---

[4] "School Budget Cuts: How Students Say Slashes Are Affecting Them," Huffington Post, February 14, 2012, http://www.huffingtonpost.com/2012/02/14/la-youth_n_1277182.html.

2. EBOOK COLLECTIONS

This section looks at the ebooks—quantity and subject matter—held by the school libraries who responded to our survey.

Offer Ebooks

In last year's survey, we noted that 44% of school libraries said that they currently offered ebooks to customers. This is far below other types of libraries (public at 89% and academic at 95%), which means school libraries are still some ways away from reaching the saturation point other types of libraries have reached.

We changed the question this year to ask *how long* they had been carrying ebooks. School libraries were not exactly early adopters; the mean is only 1.3 years. Almost one-fourth of respondents (22%) have offered ebooks for less than one year. We were also able to glean from this question that the majority of school libraries (60%) do not offer ebooks, which means that 40% do. This is down from 44% last year (which we believe is a sampling issue due to a higher prevalence of libraries this year from the West), but still above 33% in our 2010 survey.

Figure 8. How long has your library carried ebooks?
% of school libraries
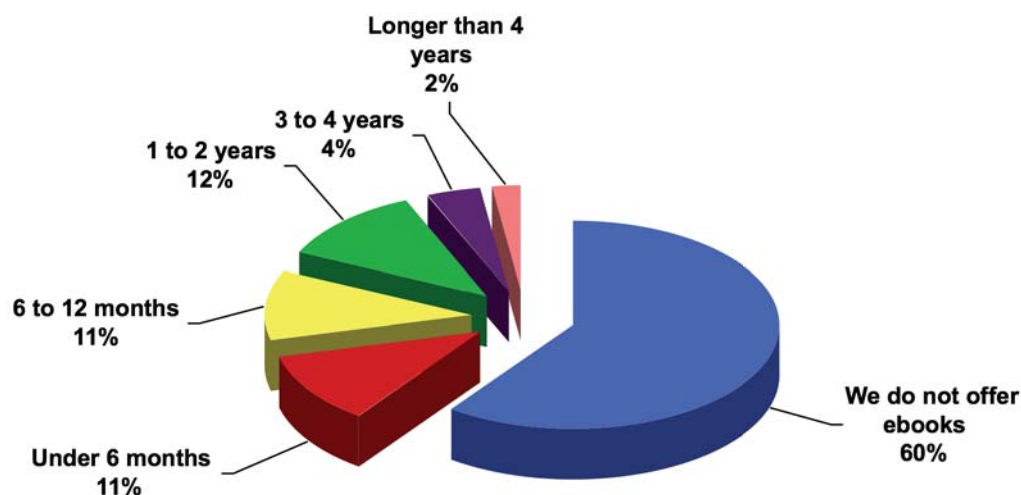
As is traditionally the case in these surveys, the disinclination to carry ebooks decreases by grade level; 67% of elementary school libraries (up slightly from 65% last year) say they *do not* carry ebooks, compared to 50% of middle schools (up from 45%) and 37% of high schools (up from 29%). Regionally, the Midwest is the least likely to carry ebooks (71%) followed closely by the West (67%).

Table 8: How long has your library carried ebooks?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
We do not offer ebooks	67%	50%	37%	60%	51%	71%	54%	67%	51%
Under 6 months	11%	14%	9%	11%	8%	9%	14%	11%	11%
6 to 12 months	10%	12%	14%	11%	7%	7%	10%	9%	15%
1 to 2 years	10%	14%	16%	12%	12%	6%	13%	7%	17%
3 to 4 years	2%	8%	13%	4%	15%	6%	6%	3%	3%
Longer than 4 years	0%	2%	10%	2%	7%	1%	3%	2%	2%
Mean # years	1.0	1.4	2.1	1.3	2.2	1.5	1.4	1.3	1.3

Driving Forces

In our 2012 survey, we added a question that asked what motivated libraries to initially adopt ebooks. The majority (79%) said that adoption of ebooks was "librarian self-motivated." "To keep up-to-date with technology" (71%) and "educational trends/best practices" (66%) were the only other substantial responses.

Figure 9. What were the driving forces behind your library's initial adoption of ebooks? (multiple responses permitted)
% of school libraries

Table 9. What were the driving forces behind your library's initial adoption of ebooks? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Librarian self-motivated	76%	81%	85%	78%	83%	86%	83%	76%	75%
To keep up-to-date with technology	68%	65%	74%	69%	82%	74%	70%	68%	71%
Educational trends/best practices	65%	63%	67%	66%	68%	75%	64%	60%	66%
Media attention	13%	6%	10%	12%	8%	12%	8%	7%	16%
Student request	10%	11%	9%	10%	18%	18%	7%	7%	14%
School administrators	12%	5%	3%	9%	11%	12%	12%	10%	7%
Faculty request	6%	7%	4%	5%	7%	6%	5%	5%	6%
Free ebook with print purchase from vendor (Follett)/Special deal (write-in answer)	3%	4%	2%	3%	1%	5%	3%	4%	2%
iPad 1:1 school (write in answer)	2%	1%	1%	1%	3%	1%	0%	3%	2%
District purchased (write in answer)	2%	1%	0%	1%	0%	0%	0%	1%	3%
School board mandate	0%	1%	1%	0%	0%	1%	0%	0%	0%
Other	12%	10%	8%	10%	10%	7%	8%	16%	9%

Libraries That Do Not Offer Ebooks

What prevents school libraries from offering ebooks to users? Of the 40% of school libraries that don't offer ebooks, the primary reason is "lack of ereading devices" (64%, down from 68% in our 2011 survey) followed by "no money for ebooks" (53%, up from 50%). Not overwhelming, but a definite increase. "No demand for them" dropped from 42% last year to 32% this year. Sixteen percent said that they were "in the process of adding ebooks."

Figure 10. Why doesn't your library offer ebooks?
% of school libraries that do not offer ebooks
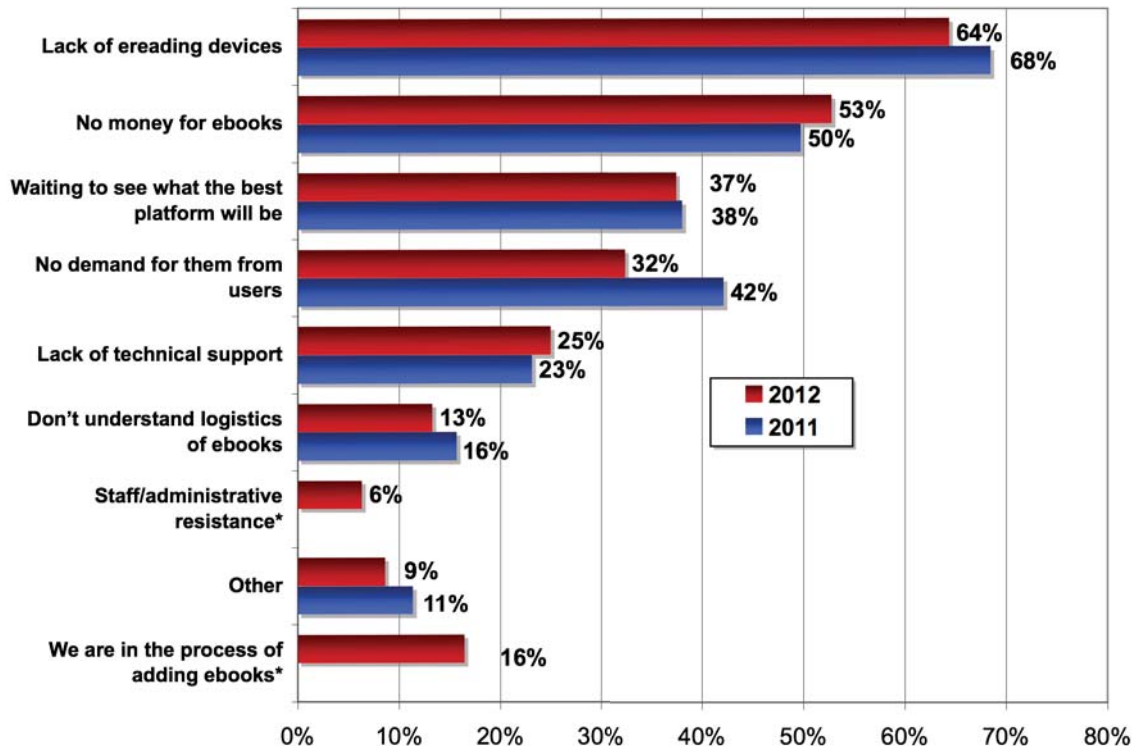
Unsurprisingly, "no money for ebooks" declines with increasing materials budget, and is fairly consistent across all school types. "No demand for ebooks" declines slightly as grade level increases.

Table 10. Why doesn't your library offer ebooks?
% of school libraries that do not offer ebooks by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
2012									
Lack of ereading devices	66%	58%	60%	65%	51%	60%	60%	68%	68%
No money for ebooks	54%	50%	47%	52%	53%	45%	47%	63%	55%
Waiting to see what the best platform will be	37%	35%	42%	37%	44%	43%	41%	33%	34%
No demand for ebooks from users	35%	27%	25%	32%	28%	36%	29%	33%	30%
Lack of technical support	25%	24%	23%	25%	20%	20%	24%	36%	19%
Don't understand logistics of ebooks	13%	11%	13%	13%	16%	15%	14%	13%	12%
Staff/administrative resistance	5%	8%	8%	5%	14%	4%	8%	8%	7%
Other	8%	9%	10%	9%	10%	7%	13%	9%	7%
We are in the process of adding ebooks	16%	23%	18%	18%	9%	16%	16%	11%	22%
2011									
Lack of ereading devices	69%	67%	71%	70%	66%	62%	68%	75%	66%
No money for ebooks	51%	46%	45%	51%	41%	52%	58%	50%	41%
No demand for ebooks from users	44%	34%	41%	42%	41%	46%	43%	40%	41%
Waiting to see what the best platform will be	36%	38%	52%	38%	42%	39%	35%	36%	42%
Lack of technical support	23%	23%	29%	25%	17%	27%	26%	24%	17%
Don't understand logistics of ebooks	15%	18%	19%	15%	18%	20%	11%	13%	18%
Other	10%	18%	10%	11%	15%	11%	7%	12%	15%

Future Plans to Acquire Ebooks

Budgets and demand being what they are, adding ebooks is not a priority. Although just over one-fourth (26%, up four percentage points from last survey) say they will "definitely" purchase ebooks to add to their collections, most respondents (55%, down from 60%) said they "may—but it's not a priority." Only 9% said they definitely won't.

Figure 11. What are your library's plans for ebook purchases in the next two years?
% of school libraries that do not offer ebooks

High schools are again the most likely of the three school types to be adding ebooks to their collections in the next two years (30% say "definitely," though this is down from 36% last year). Ebooks are not a huge priority for 56% (down from 63%) of elementary schools that say they "may" add ebooks to their collections.
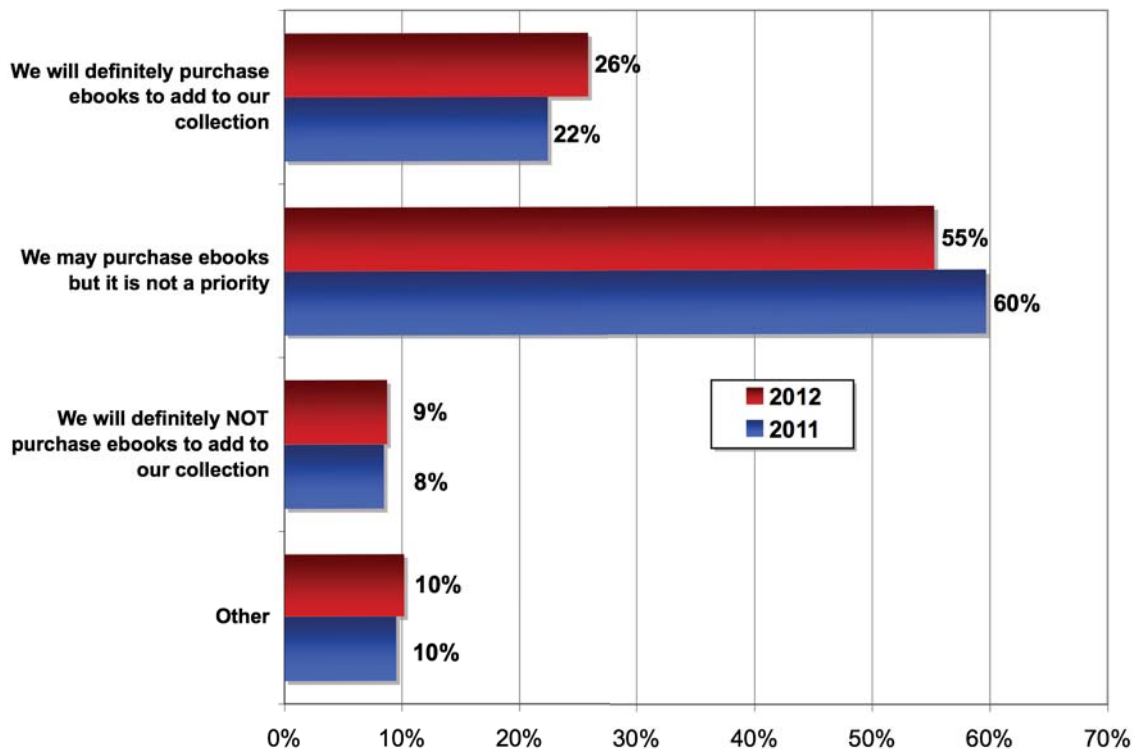
Table 11. Do you expect your library will offer ebooks...?
% of school libraries that do not offer ebooks by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
2012									
We will definitely purchase ebooks to add to our collection	25%	31%	30%	26%	29%	27%	26%	14%	34%
We may purchase ebooks but it is not a priority	56%	49%	50%	56%	54%	56%	54%	61%	51%
We will definitely NOT purchase ebooks to add to our collection	10%	4%	5%	8%	8%	8%	9%	13%	5%
Other	9%	16%	14%	10%	10%	9%	10%	12%	10%
2011									
We will definitely purchase ebooks to add to our collection	19%	41%	36%	23%	28%	22%	28%	14%	25%
We may purchase ebooks but it is not a priority	63%	47%	52%	59%	59%	64%	54%	62%	58%
We will definitely NOT purchase ebooks to add to our collection	9%	8%	10%	9%	5%	4%	10%	11%	9%
Other	10%	5%	3%	10%	8%	10%	9%	12%	8%

SPONSORED BY:
Follett Library Resources

Number of Ebooks Offered

Schools that offer ebooks are rapidly expanding their collections, even if the rate of new additions is slowing a little. The average number of ebooks carried by school libraries has almost doubled in the past year, from a mean of 397 ebooks in 2011 (median 35) to 725 (median 94) in 2012. This is also way up from a mean of 49 (median 32) in our 2010 survey. The differential between the means and the medians suggests we have some outliers that are skewing the averages. Please note that if a respondent checked "5,000 or more" or "Under 100," they were asked to specify and that number was used in calculating means and medians.

Figure 12. How many ebooks does your library have access to in total, including ebooks licensed through the district, state or consortium?
% of school libraries

- 5,000 or more 2%
- 2,500 to 4,999 2%
- 1,000 to 2,499 5%
- 500 to 999 7%
- 250 to 499 6%
- 100 to 249 25%
- Under 100 53%

Figure 13. How many ebooks does your school currently subscribe to or own?
% of school libraries (2011 survey)

- More than 100 15%
- 51 to 100 16%
- 21 to 50 13%
- 11 to 20 8%
- 6 to 10 4%
- 1 to 5 9%
- None 35%

SPONSORED BY:
Follett Library Resources

High schools are likely to have many more ebooks than elementary or middle schools, and are up almost fivefold from last year's survey. Private schools continue to have far more ebooks than public schools—4,751 vs. 393 on average.

Table 12. How many ebooks does your library have access to in total, including ebooks licensed through the district, state or consortium?
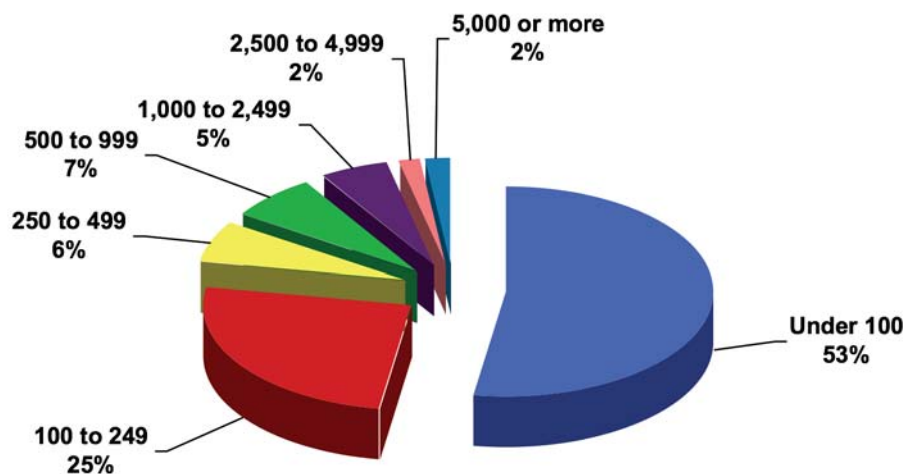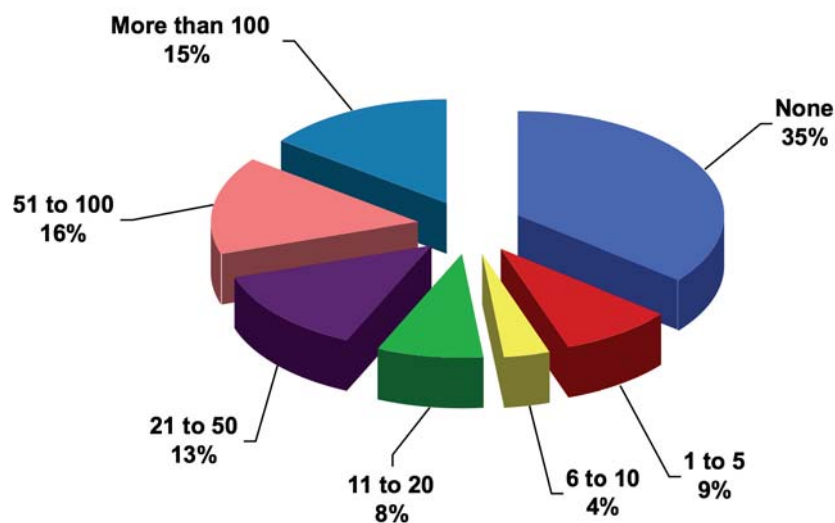*% of school libraries by type of school and geographic region*

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Under 100	57%	59%	38%	53%	41%	47%	63%	56%	48%
100 to 249	24%	23%	30%	26%	24%	25%	24%	26%	26%
250 to 499	5%	7%	10%	6%	9%	10%	4%	7%	5%
500 to 999	7%	4%	10%	7%	7%	8%	4%	5%	9%
1,000 to 2,499	5%	2%	6%	5%	6%	8%	2%	0%	8%
2,500 to 4,999	1%	3%	2%	2%	1%	2%	1%	1%	3%
5,000 or more	1%	1%	4%	1%	12%	1%	2%	4%	1%
Mean	320	435	1,525	393	4,751	424	914	886	672
Median	87	84	159	93	157	118	79	89	114
2011									
1 to 5	17%	13%	7%	14%	16%	13%	12%	16%	15%
6 to 10	3%	11%	9%	5%	7%	3%	11%	5%	4%
11 to 20	15%	8%	13%	13%	9%	19%	14%	18%	7%
21 to 50	23%	19%	18%	21%	22%	15%	22%	19%	24%
51 to 100	24%	29%	22%	25%	16%	24%	24%	16%	27%
More than 100	18%	19%	32%	22%	29%	26%	18%	25%	22%
Mean	85	119	365	230	2,873	501	102	97	619
Median	35	35	75	35	35	35	35	35	35

Increased Demand

User demand is on the rise, albeit not dramatically; 37% of respondents said that they had indeed seen a "slight increase" in demand for ebooks, up from 21% last year. Only 9% (up from 6%) reported a "dramatic increase" in demand. And while "demand is unchanged" jumped from 16% to 27%, "we receive no demand" plummeted from 58% to 26%.

Figure 14. Have you experienced an increase in requests for ebooks since this time last year?
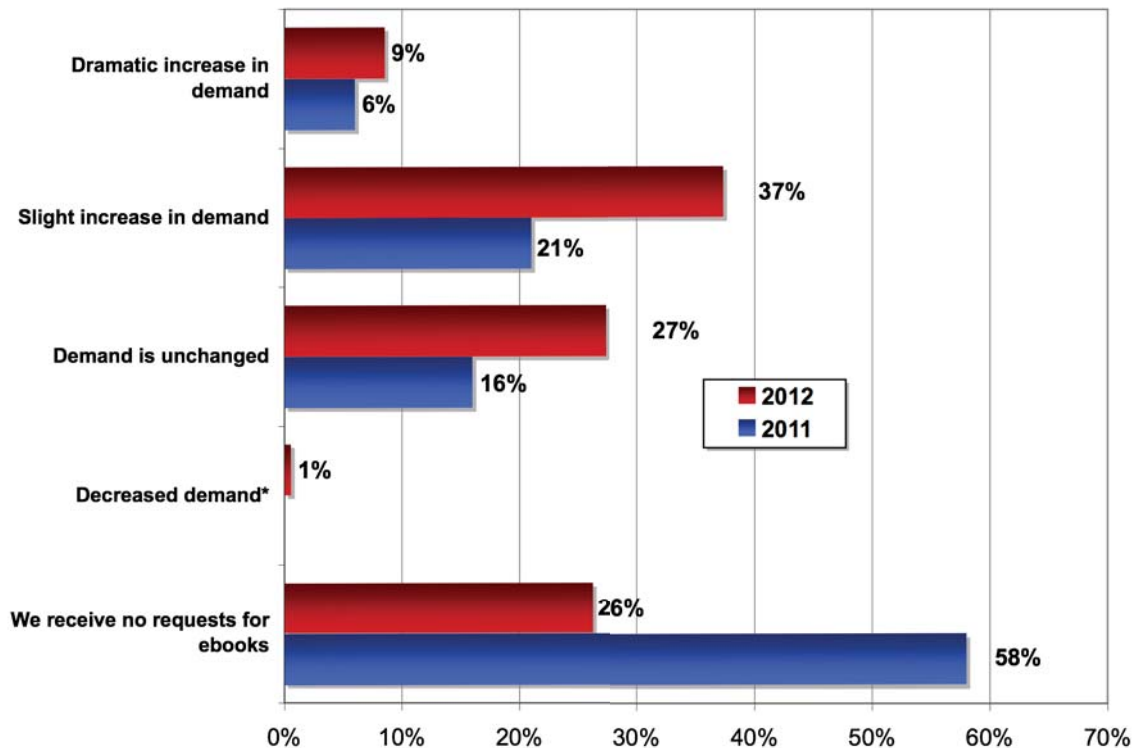*% of school libraries*

Table 13. Have you experienced an increase in requests for ebooks since this time last year?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
2012									
Dramatic increase in demand	10%	6%	5%	9%	8%	17%	6%	5%	8%
Slight increase in demand	34%	40%	36%	37%	42%	46%	42%	39%	30%
Demand is unchanged	27%	27%	30%	27%	31%	23%	22%	22%	34%
Decreased demand	0%	0%	1%	0%	3%	0%	0%	1%	1%
We receive no requests for ebooks	29%	27%	27%	28%	15%	14%	30%	33%	27%
2011									
Yes, dramatic increase	4%	6%	6%	6%	6%	15%	5%	11%	7%
Yes, slight increase	17%	28%	26%	21%	25%	35%	32%	22%	22%
Request level is unchanged	14%	17%	22%	15%	18%	23%	26%	44%	23%
We receive no requests for ebooks	64%	49%	46%	58%	51%	27%	37%	23%	49%

SPONSORED BY:
Follett Library Resources

Ebook Formats and Devices

Competing ebook formats and hardware devices were substantial barriers to offering ebooks in general to library users in the past—although budget seems to trump most other concerns this year. What is the latest on the format morass?

Downloaded Ebooks vs. Online Ebooks

We added a new question to our 2012 survey to determine how students are accessing ebooks. Are they downloading the ebooks to a device, like a traditionally circulated book or are they viewing the book online without a download? Here we found the exact opposite of our public library survey: the vast majority of schools' ebook titles are viewed online (78%), while only 22% are downloaded.

Figure 15. What percent of your school's ebook usage would you estimate is downloaded versus viewed online?
% of school libraries

Average % downloaded 22%

Average % viewed online 78%
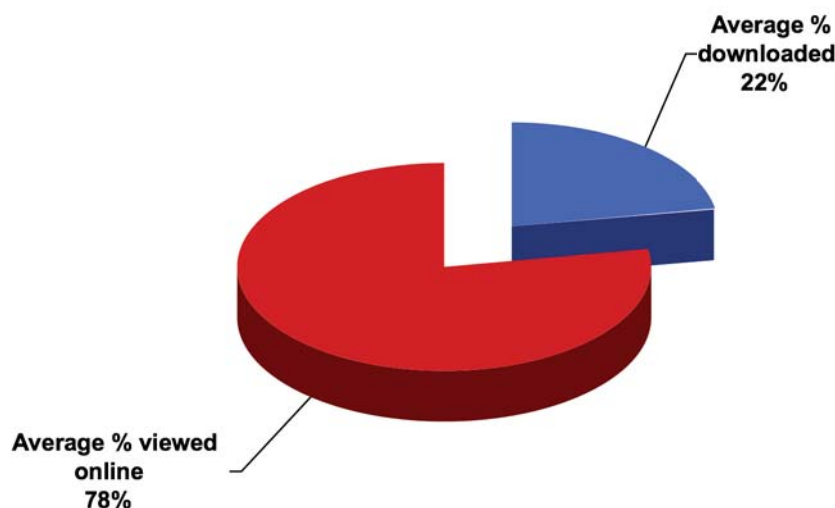
Elementary school users are slightly more likely to view ebooks online. We suspect that concurrent group reading is occurring at this level, possibly on classroom whiteboards.

Table 14. What percent of your school's ebook usage would you estimate is downloaded versus viewed online?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Average % downloaded	18.6	27.5	20.1	21.1	27.2	26.9	21.6	24.8	19.2
Average % viewed online	81.4	72.5	79.9	78.9	72.8	73.1	78.4	75.2	80.8

Ebook Software Formats

The ereading device landscape has changed quite a bit from our last survey, and even more so since the 2010 survey. Ebook formats optimized for dedicated ereading devices—like the Kindle or Nook—remain the most preferred formats for school libraries' ebook users, selected by 28%, an all-time high for this item (up from 22% in 2011 and 14% in 2010). PDF continues its drop, from 23% to 20% to 16%, and even ePub has dropped from 19% to 14% (but was at 7% in 2010). A large percentage, 38% (though down from 41%), don't know what their users' preferred formats are.

Figure 16. In which format do users generally prefer ebooks? (multiple responses permitted)
% of school libraries
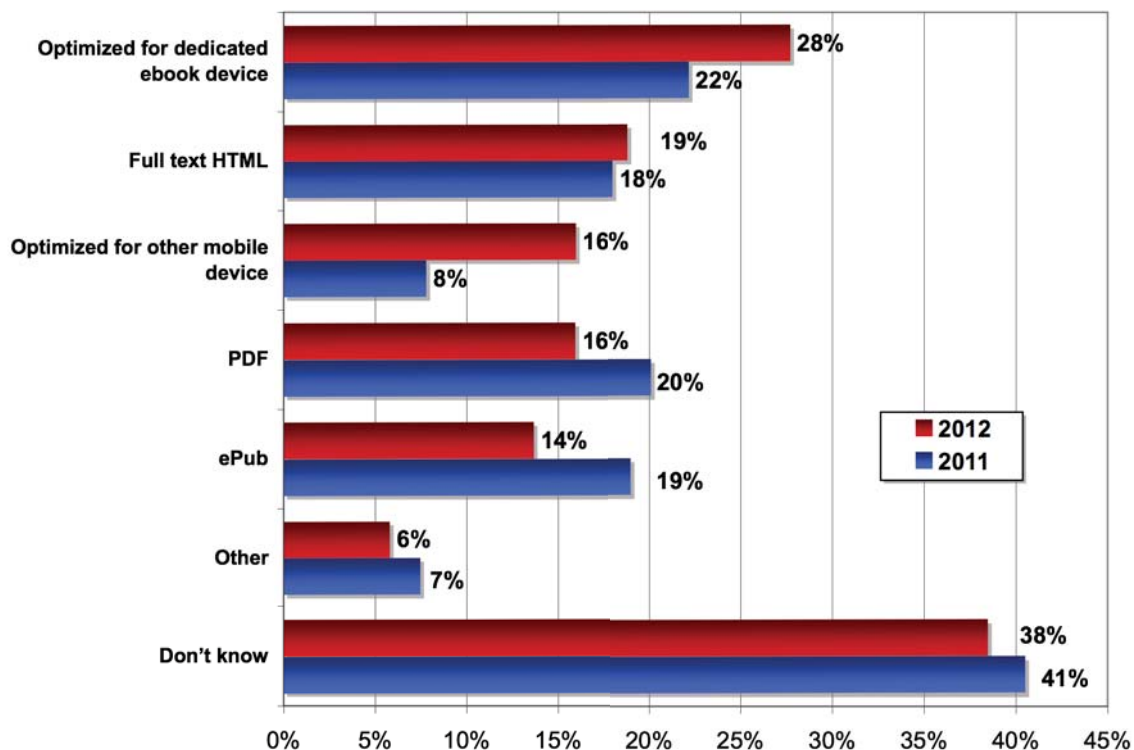
"Don't know" responses are highest for elementary school libraries and decline as school level increases. While "optimized for dedicated ebook device" again peaks at 33% among high school libraries, "full text HTML" (27%) and "PDF" (26%) are still the top formats for high school libraries.
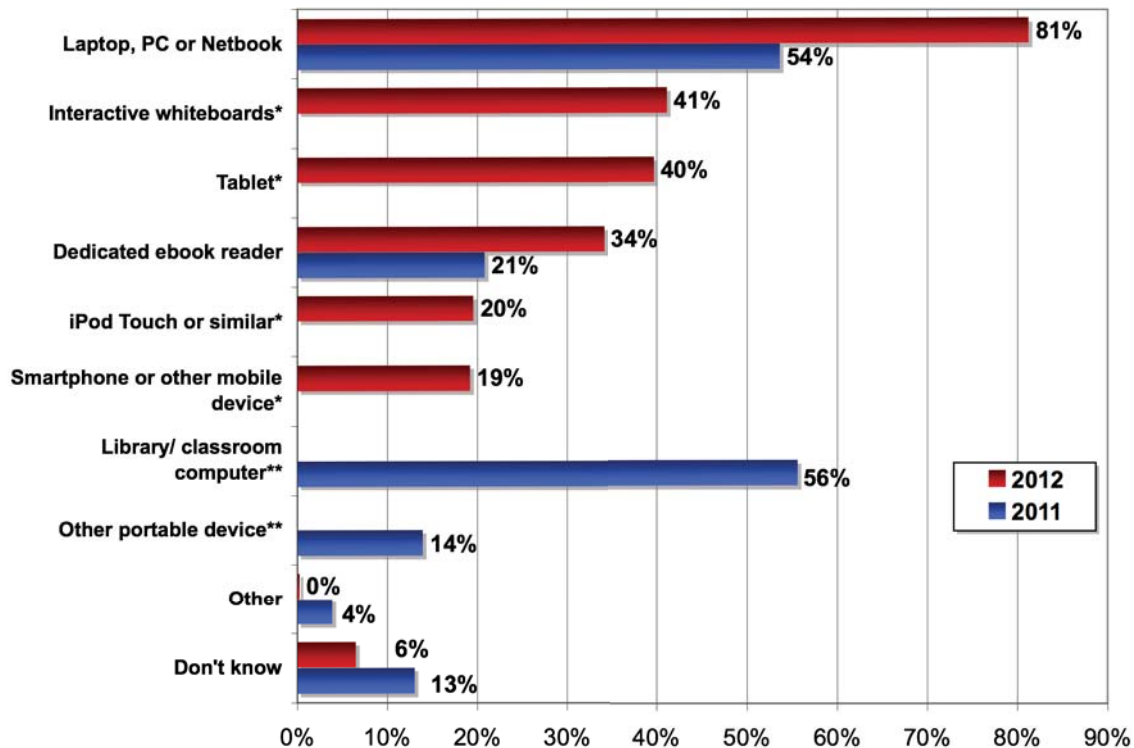
Table 15. In which format do users generally prefer ebooks? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Optimized for dedicated ebook device	19%	39%	33%	27%	33%	31%	27%	31%	25%
Full text HTML	15%	19%	27%	17%	37%	14%	24%	16%	19%
Optimized for other mobile device	12%	18%	21%	16%	19%	16%	14%	19%	16%
PDF	11%	17%	26%	15%	32%	14%	19%	11%	18%
ePub	11%	14%	14%	14%	15%	26%	6%	11%	14%
Other	7%	3%	4%	6%	5%	7%	7%	6%	4%
Don't know	46%	34%	31%	40%	23%	33%	37%	40%	40%
2011									
Optimized for dedicated ebook device	10%	44%	31%	21%	31%	26%	26%	25%	17%
PDF	17%	23%	27%	20%	24%	13%	27%	25%	17%
ePub	19%	25%	14%	20%	8%	20%	18%	24%	18%
Full text HTML	12%	18%	32%	17%	29%	15%	21%	9%	21%
Optimized for other mobile device	2%	15%	11%	8%	4%	5%	12%	6%	7%
Other	11%	5%	1%	8%	2%	5%	9%	1%	10%
Don't know	45%	35%	34%	41%	41%	51%	32%	43%	39%

Hardware Devices

In our annual question about the devices used to access ebooks, we mistakenly removed "library/classroom computer" from the survey and simultaneously saw the general "laptop, PC, or netbook" jump from 54% to 81%, so some quantity of these responses likely use library or classroom computers. We added "interactive whiteboards" and "tablets" to this year's survey, which came in at 41% and 40% respectively. "Dedicated ebook reader" climbed from 21% to 34%. We also added "iPod Touch or similar" and "smartphone or other mobile device," which came in at 20% and 19%, respectively.

SPONSORED BY:
Follett Library Resources

Figure 17. What device(s) do your library users most often use to read ebooks? (multiple responses permitted)
% of school libraries

Added to 2012 survey.
**2011 survey only.*

Middle and high school students are the most likely to use dedicated ebook readers, while tablets find favor in high schools. Using ebooks with interactive whiteboards is more popular in elementary schools.[5]

Table 16. What device(s) do your library users most often use to read ebooks? (multiple responses permitted)
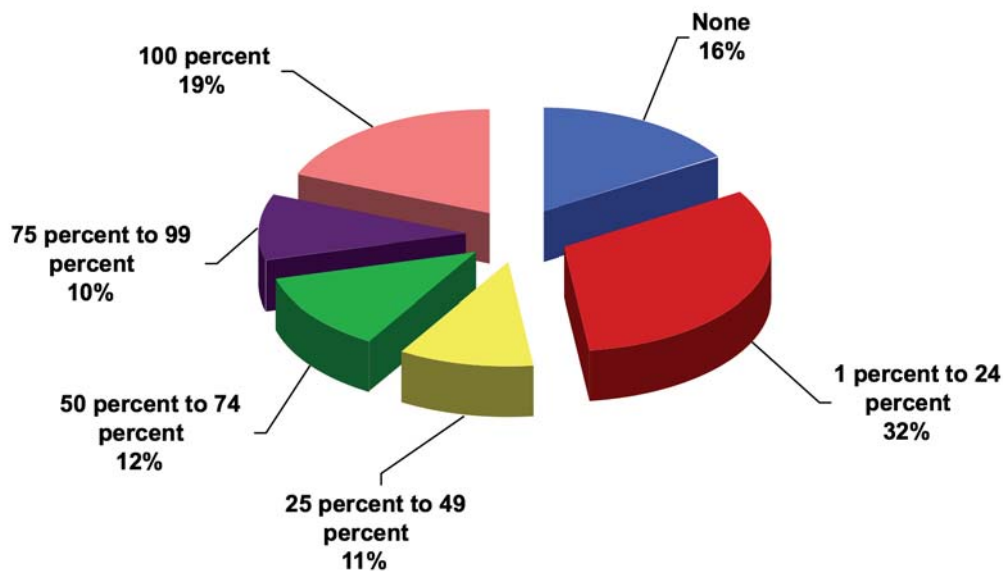*% of school libraries by type of school and geographic region*

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Laptop, PC or Netbook	82%	76%	83%	82%	81%	85%	78%	73%	86%
Interactive whiteboards	56%	17%	19%	44%	15%	39%	43%	31%	46%
Tablet	37%	35%	45%	38%	59%	46%	39%	39%	37%
Dedicated ebook reader	25%	43%	42%	32%	47%	52%	36%	33%	26%
iPod Touch or similar	15%	25%	24%	19%	19%	30%	14%	18%	19%
Smartphone or other mobile device	10%	28%	31%	19%	26%	26%	15%	16%	21%

---

[5] Follett, for example, specializes in ebook–whiteboard interactivity for both elementary and secondary school use.

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
Other	0%	2%	0%	0%	0%	0%	1%	1%	0%
Don't know	7%	7%	7%	7%	5%	6%	8%	6%	5%
2011									
Library/classroom computer	59%	47%	56%	57%	36%	44%	52%	48%	66%
Personal laptop/ Computer/Netbook	53%	49%	56%	54%	60%	56%	53%	48%	55%
Dedicated ebook reader	10%	36%	29%	19%	38%	29%	23%	28%	13%
Other portable device	11%	13%	16%	13%	19%	16%	17%	17%	10%
Other	6%	1%	1%	4%	2%	8%	3%	6%	1%
Don't know	15%	12%	10%	13%	11%	12%	10%	19%	14%

Librarians approximate that about 40% of students that read ebooks on dedicated ereading devices are using student- or family-owned ereaders or tablets. This means that 60% read ebooks on dedicated ereaders provided by the school.

Figure 18. If dedicated ereaders or tablets are used, what percent of students who read on these devices would you estimate read on a student or family-owned ereader or tablet? *% of school libraries*

Middle school students are the most likely of the three school types to use their own ereading devices or tablets.

Table 17. If dedicated ereaders or tablets are used, what percent of students who read on these devices would you estimate read on a student or family-owned ereader or tablet?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
None	21%	11%	11%	17%	13%	17%	15%	11%	19%
1% to 24%	35%	26%	33%	34%	20%	30%	21%	36%	37%
25% to 49%	8%	12%	13%	9%	20%	10%	9%	7%	13%
50% to 74%	19%	5%	7%	13%	4%	5%	18%	20%	9%
75% to 99%	0%	23%	18%	10%	20%	11%	12%	7%	11%
100%	17%	23%	19%	17%	24%	27%	25%	19%	11%
Mean %	33.0	52.4	45.1	38.6	50.2	44.6	51.3	39.2	32.6
Median %	15.0	50.0	30.0	20.0	37.5	25.0	50.0	30.0	20.0

Download Ebooks to Personal Devices

Are students allowed to download ebooks to their own personal devices? Yes and no. One-half of libraries said "yes, on our Internet computers" while almost as many (45%) said "no, downloads must be made offsite." Only 5% have a dedicated download station. These approaches may not be the libraries' choice; they are often constrained by publishers' and vendors' terms of use policies.

Figure 19. Are users able to download ebooks to devices inside your school?
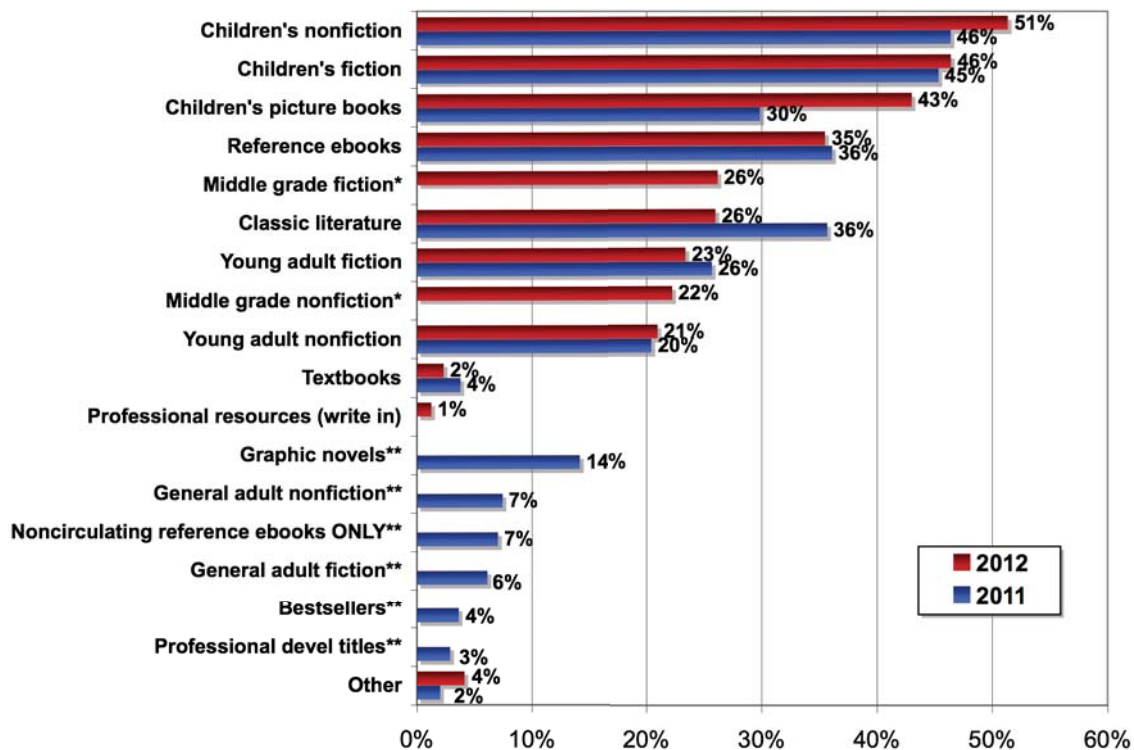*% school libraries*
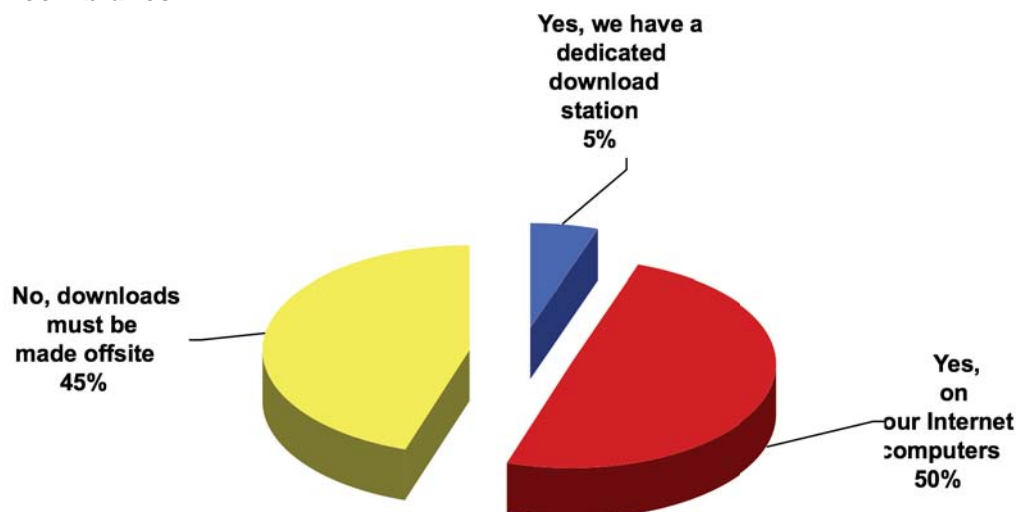
Table 18. Are users able to download ebooks to devices inside your school?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Yes, we have a dedicated download station	5%	9%	4%	5%	4%	11%	2%	7%	4%
Yes, on our Internet computers	50%	44%	51%	48%	62%	48%	47%	48%	53%
No, downloads must be made offsite	45%	46%	45%	46%	34%	41%	52%	44%	43%

Ebook Categories

Children's nonfiction pulled ahead of children's fiction this year as the top category of ebooks that school library media centers offer users—children's nonfiction grew from 46% last year to 51% this year, while children's fiction stayed roughly the same at 46%. Children's picture books grew from 30% to 43%. Young adult fiction dropped slightly from 26% to 23% while young adult nonfiction held steady at 21%. We added middle grade nonfiction this year and it debuted at 22% of all school libraries.

Figure 20. Which categories of ebooks does your library media center currently offer users? (multiple responses permitted)
*% of school libraries*

*Added to 2012 survey.
**On 2011 survey only.

Table 19. Which categories of ebooks does your library currently offer users? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Children's nonfiction	82%	13%	3%	55%	11%	44%	43%	48%	61%
Children's fiction	72%	15%	4%	47%	21%	36%	37%	50%	54%
Children's picture books	67%	13%	4%	45%	12%	40%	30%	41%	53%
Reference ebooks	13%	42%	79%	33%	72%	39%	37%	39%	31%
Middle grade fiction	18%	65%	8%	26%	31%	36%	27%	25%	22%
Classic literature	13%	35%	44%	25%	37%	32%	19%	29%	26%
Young adult fiction	3%	40%	49%	23%	36%	40%	23%	18%	19%
Middle grade nonfiction	14%	59%	6%	23%	20%	27%	21%	26%	19%
Young adult nonfiction	3%	32%	47%	21%	29%	37%	21%	18%	15%
Textbooks	1%	3%	4%	2%	8%	5%	2%	2%	1%
Professional resources (write in)	1%	2%	1%	1%	0%	1%	1%	1%	2%
Other	4%	2%	8%	3%	15%	3%	3%	6%	5%
2011									
Children's nonfiction	73%	23%	4%	48%	11%	50%	41%	35%	51%
Children's fiction	68%	33%	5%	47%	11%	53%	42%	52%	40%
Reference (non-circulating)	16%	37%	75%	34%	70%	37%	43%	32%	34%
Classic literature	30%	47%	39%	36%	34%	34%	27%	61%	35%
Children's picture books	46%	12%	5%	31%	8%	31%	23%	25%	34%
Young adult fiction	8%	53%	39%	26%	28%	33%	26%	22%	22%
Young adult nonfiction	3%	38%	41%	20%	32%	25%	24%	13%	18%
Graphic novels	15%	18%	8%	15%	4%	13%	12%	27%	13%
General adult nonfiction	2%	6%	18%	7%	21%	11%	13%	3%	4%
General adult fiction	2%	6%	13%	6%	13%	10%	7%	8%	3%
Textbooks	2%	3%	5%	3%	6%	2%	2%	14%	3%
Bestsellers	0%	4%	9%	4%	6%	6%	5%	2%	2%
Professional devel titles	3%	3%	1%	3%	2%	1%	2%	1%	6%
Other	1%	1%	3%	2%	4%	2%	2%	1%	2%
Noncirculating reference ebooks ONLY	0%	11%	18%	6%	21%	4%	11%	4%	7%

SPONSORED BY:
Follett Library Resources

This year, we added a follow-up question to gauge the most in-demand ebook categories. Children's nonfiction, children's fiction, and children's picture books are the top three most in-demand ebook categories reported by school libraries.

Figure 21. Which categories of ebooks are most in-demand? (top three categories selected)
% of school libraries
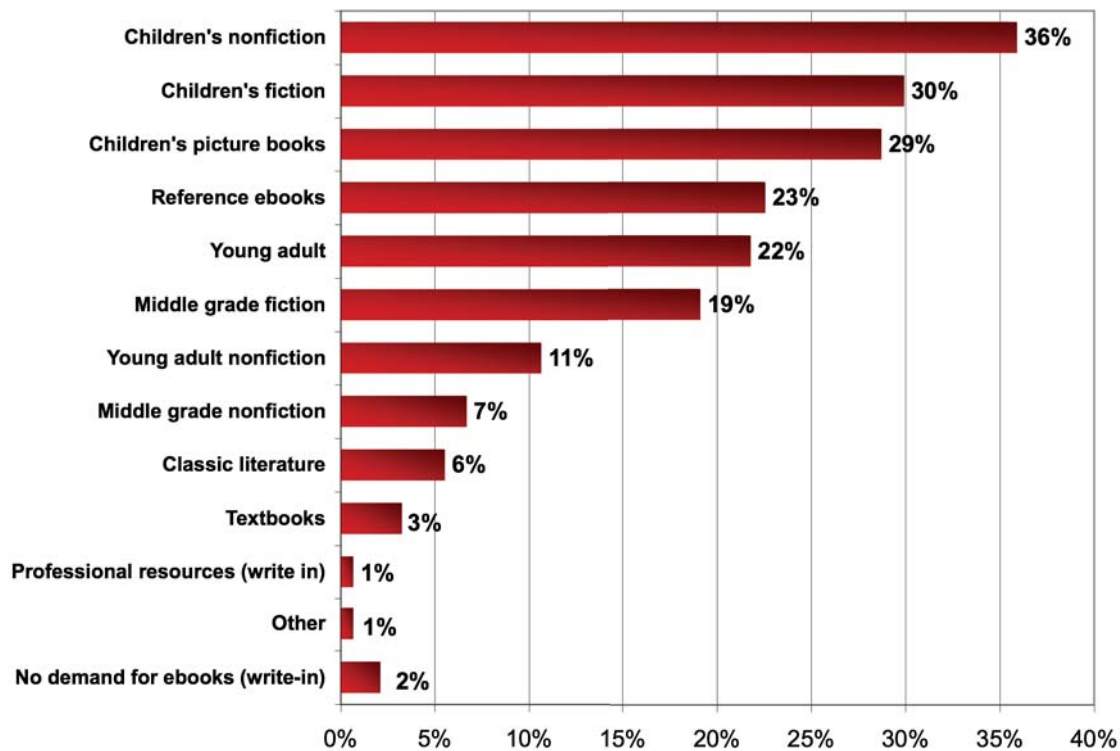
The top in-demand categories for elementary schools are:
- Children's nonfiction (64%)
- Children's fiction (52%)
- Children's picture books (50%)

The top in-demand categories for middle schools are:
- Middle grade fiction (58%)
- Young adult (37%)
- Middle grade nonfiction (23%)

The top in-demand categories for high schools are:
- Reference ebooks (57%)
- Young adult (47%)
- Young adult nonfiction (29%)

Table 20. Which categories of ebooks are most in-demand? (top three categories selected)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Children's nonfiction	64%	1%	0%	39%	5%	30%	33%	38%	39%
Children's fiction	52%	4%	1%	31%	12%	27%	31%	34%	29%
Children's picture books	50%	4%	1%	32%	3%	31%	20%	22%	36%
Reference ebooks	7%	20%	57%	20%	59%	22%	29%	22%	19%
Young adult	2%	37%	47%	22%	25%	31%	22%	20%	18%
Middle grade fiction	11%	58%	5%	19%	23%	28%	19%	18%	16%
Young adult nonfiction	1%	16%	29%	11%	14%	17%	12%	11%	7%
Middle grade nonfiction	4%	23%	1%	7%	3%	8%	7%	9%	5%
Classic literature	1%	10%	12%	5%	12%	6%	6%	7%	4%
Textbooks	0%	5%	8%	2%	14%	4%	2%	8%	2%
Professional resources (write in)	0%	2%	0%	1%	0%	1%	1%	1%	0%
Other	0%	2%	0%	1%	0%	1%	1%	1%	0%
No demand for ebooks (write-in)	2%	4%	2%	2%	0%	2%	0%	1%	4%

General Conclusions

Ebook adoption has been growing much more slowly in school libraries than in other types of libraries. Currently, 60% of school libraries still *do not* offer ebooks to students, and budgetary constraints are one of the top reasons why. Unlike other libraries, the majority of libraries that do not currently offer ebooks are not in any hurry to acquire them. They may in the future—but it's not a priority.

That said, high schools are the most likely to offer ebooks, largely reference materials, although fiction and nonfiction titles are being added as well. Lack of ereading devices—either obtained through the school library or from home—also serves as a barrier to offering ebooks. Interactive whiteboard use in elementary classrooms is increasing, and ebooks that integrate with that technology are especially favored. Librarians would also like to allow students to download ebooks to their chosen devices, but many vendors' purchasing terms still require online-only reading, which frustrates many.

Most ebook adoption by school librarians has been driven by the librarians themselves, who are quite technologically savvy, and are only hampered by being unable to afford much of that technology. And, as we'll see throughout this report, ebook publishers and vendors are, generally, not helping.

In Their Own Words...

On our questionnaire, we asked libraries to share their overall thoughts about ebooks in their school media centers or libraries. We present a sampling of them, here, and at the end of Section 4 (lightly edited).

- "If you build it, they will come" is not true for my school. When given the choice between print and ebooks, our students almost always choose print.

- A great number of ebooks accessible from our catalog are freely available online from such sites as Gutenberg and Adelaide University. We also subscribe to Oxford Reference Online which wasn't mentioned in the survey.

- After a grant-funded makeover, I will be better able to advertise and create buzz about e-books. I am seeing more students also with ereaders and iPads during independent reading time. I think that after a very slow start, this next year will be the year of the e-book!

- All of the books we have now are through Tumblebooks, but I have a little money to buy from Mackin/Barnes and Noble from a grant and maybe Scholastic with book fair money. We are new to the process.

- As noted earlier, we are just getting started with this format. My school is in a poor urban area; initial interest has not been strong. Improving circulation is among my goals for next year.

- As our school prepares for a BYOD policy in the near future, I only see the purchasing of ebooks increasing in the future. Having a cloud-based service that works on a multitude of devices is also very important.

- At present we only have ebooks in a reference collection because our district technology department has not supported individual titles.

- Big difference in the way ebooks are used to support academic work and to support personal interest/pleasure reading. We expect tablets (iPads) to be the convergence device.

- Budget eliminated so have only 53 to make comments about. This is a new technology for our school and it is just now being PR'd. I am going to individual teachers and explaining its use. Students want to "click" only once or twice and they are also getting acquainted with the system.

- Cost is the biggest factor in purchasing, especially because it's technically licensing the content.

- Current budgetary restrictions make ereader purchases unlikely in the near future. Ebooks available only on computers are too cumbersome to be attractive to middle schoolers.

- Currently almost entire ebook collection is through free access to state online databases. We don't have the budget to purchase individual ebooks at this time.

- Demand will surely rise when my patrons are able to upload our library ebooks to independent ereaders such as Nooks and Kindles.

- Despite the drive from administration to create a digital library collection, the majority of our students would rather hold a printed book and read it rather than read on their iPads. A lot of students admit that the iPad poses a major distraction to reading and they are able to focus better when holding an actual book.

- Didn't buy after grant ended since they cost so much for one year subscription. Very limited budget.

- Due to DRM issues, ebook purchasing will be limited to reference and nonfiction materials for library use. Some Nooks have been purchased by the school through a grant, but due to DRM issues the books purchased are not accessible to or through the library. Therefore, no library funds will be used to support the Nook program. I find the current state of affairs frustrating and at times infuriating. Things will need to change a great deal before ebooks become more than a reference tool for this library.

- Ebooks are hard to publicize. Popular ones could have a long waiting list for students. Students must be able to "check them in" if they don't like them, and some students will forget and just keep them out for the full time period, depriving other students from getting access. Deciding which ebooks to purchase is difficult. Most students have access to a plethora of books to check out from our library collection so the value of ebooks is debatable. Not all students have access at home and the idea of buying a bunch of ereaders that may get obsolete or replaced by the next new thing quickly is a questionable use of money. Better that students use their own devices. The PR for ebooks/audiobooks has to be upfront and center to get students aware of them, if students aren't used to going to the school Web site to gain access via the library website links. The process of students getting the right "reader" or app on their device is sometimes a problem. The companies who sell the ebooks should provide schools with student-friendly instructions for getting the app or software loaded on the device in order for students to use their books.

- Except for Gale Virtual Reference Library, Ebrary is new as of Jan. 2012, Nooks as of April 2012, and Overdrive is still being set up and not available as yet.

- Few kids are asking for them. Those that want them have a device and just order it for themselves when they have interest/need.

- Find the inability to "predict" which device will enable reading e-books from which vendor. Had to send back Nook Tablets because they are so app-specific.

- FollettShelf has worked well because it integrates with our circ/cat software. The one-stop-shopping approach is very attractive for a busy school librarian!

- Have just gotten in around 300 titles (first time). Students have been very open to using them and are checking them out and reading online.

- Having researched ebook distributors for school libraries, I feel like young readers' needs have been largely untapped. If we can have vendor/program access for students' personal devices they are likely to become life-time ebook customers.

- Having these books for student research projects has been tremendous in minimizing loss and increasing student access to resources.

- I am at a brand new school this year. We opened the school with a good collection of nonfiction ebooks. We have not had a lot of use of ebooks— or I am not able to measure the use, because of "reading online" and not downloading. I plan to order more ebooks in the future. I would like to get more fiction, however, I prefer to get simultaneous multi-user licenses. Most fiction books are not available in this way. Ebooks from some publishers are cumbersome to use at school (even with the simultaneous multi-user versions) due to filters that make page loading slow. We, also, do not have individual student accounts set up, where students could check out an ebook by themselves online.

- I am excited about ebooks and am hopeful it will be another avenue to get more kids reading. We are in the "Age of Technology"....the biggest and fastest change in society since the Industrial Revolution. I want to be able to provide books in whatever format the kids demand and I believe that means keeping up and being on the edge of the latest offering and now that seems to be digital.

- I am still undecided about what types of readers library should be providing and if library should have readers available. Also, I have still not found an easy way to introduce and organize. Each company seems to have a different way of organizing. It would be easiest if they could all be found in one central location on school library Web site.

- I am the only person who has checked any out. I don't think the Follett platform is good enough for most users, but on the other hand, I don't think many of my kids have access to or funds to buy ereaders. Many have phones, but I don't see smartphones very often. I have seen a couple of kids with Kindle Fires. Most tell me they don't have a way to read them. Poverty.

- I have a several ebook readers to test the waters. I use them to buy things when I need something right away. It has been pretty easy and most students appreciate the ease of use after the first reluctance. My frustration was that I could not access the Sony store with our old readers and moved to Nook.

- I have been pleased with the usage of reference ebooks. I am trying the Nook to see how the students adapt to the ereaders. Pleased with the results so far.

- I have purchased ebooks within Gale's Virtual Library, but I consider that e-content to be more like database articles. In terms of ebooks I did an enormous amount of research and Overdrive was the only one that offered the ability to download library books to every type of device (iPad, iPod, iPhone, smartphone, Kindle, Nook, generic ereader, etc...) I'm happy with this feature but extremely dissatisfied with publishers that are unwilling to make their content available for borrowing in Overdrive (Penguin, Macmillan, Simon & Schuster, MTV books, TOR, and even some recent Little Brown books aren't available). In addition, Random House has increased the cost of their books so much that they're unaffordable: $40–$75 for a new release ebook. It's maddening. I looked at FollettShelf and the trouble with it was that readers would need an Internet connection every time they went to read a book on it. Readers want to have the book on their device, they don't want to rely on spotty Internet connections every time they pick it up. So, I selected Overdrive.

- I have used mostly reference books from Gale as they were purchased by the district and then a grant, but want to move to fiction as we are getting laptops for all 9th and 10th grade students but do not find it easy to figure out how to purchase ebooks and how they fit in our circulation system.

- I hope we can get publishers on board for a reasonable working agreement with school libraries. I don't think libraries really mind paying after 26 checkouts, but at least make your titles available to us through Overdrive!

- I know that we are in the age of ebooks, however I am also saddened to think that we are focusing so much on technology that we are being forced to stop having paper books in our libraries.

- I like EBSCOHost best (although I liked it A LOT better when it was NETLibrary) simply because we get a lot of unique titles for our students to use while researching. Infobase gave us a nice bundle, too...free ebook with every hard cover book we purchase.

- I love the flexibility ebooks offer and I also love that vendors like Follett can provide titles with licensing for projection onto Promethean boards and universal access. While I will always love my paper and ink books, this is definitely a step in the right direction for education.

- I need unlimited access for nonfiction and reference. When a class is researching I want all the students to be able to use the ebook at the same time.

- I started buying ebooks years ago, primarily nonfiction titles. I know I must begin including ereaders and more popular titles in our school library, but right now it's completely cost prohibitive. My budget is only

$2700 per year, and I'm having a hard time getting support for grants or funding from my school district. As a matter of fact, our AUP prohibits students from using their tablets and e-readers in our buildings. I'm looking at ways to partner with other small, rural schools in my area to form some sort of consortium.

- I think there is great potential. I wish, however, that there was more availability of use across devices. For example, I have a Follett Shelf, but books cannot be accessed on Nooks or Kindles. I'd like to see this change and become easier.

- I wish publishers would allow us to buy their product!

- I wish that more fiction ebooks would be available through our regular vendor, then I would definitely start buying.

- I would love to be able to provide ebooks for my students, as a number of students have ereaders. However with no materials budget, I cannot afford to purchase them. I refer my students to the public library and their Overdrive service. I have linked 22 books (so far) to our OPAC provided free from Project Gutenberg. It is a start and provides the interested student with the ability to read the book online or to download to an ereader.

- If OverDrive was less expensive we would purchase it for our school in a heart beat. The $3000 a year is a little much though. One to two thousand would be more manageable.

- I'm concerned about the lack of selection, and the difficulty of downloading. Library ebooks are not yet user-friendly products.

- I'm sorry that I can't offer more Kindles to my students. Purchasing these devices has helped encourage students to read more and some even purchased one of their own.

3. EBOOK ACQUISITION, LICENSING, AND CIRCULATION

In this section, we look at some of the types of ebook access libraries give users (based on what vendors give to libraries), as well as other circulation trends.

Acquisition Influencers

We reprised our annual question asking about the top factors that influence ebook acquisition. (For the sake of clarity, we present the 2012 data in Figure 22; 2011 responses are in Figure 23.)

There has been some movement at the top of the list; "multiple users at one time" has moved to the number one position, from 48% of respondents last survey (where it had been phrased "multiple users allowed") to 61% this survey. We added "24/7 offsite access" to this year's survey and it debuted at 49%. We also added "cost" to the 2012 survey and it debuted at the number three position, selected by 44% of respondents. Last survey's top response, "projected usage/high demand titles" drops to 42% (from 60% last year and 55% in 2010). The twin themes of this report—cost and access—are clearly reflected in these acquisition drivers.

Figure 22. What factors influence your decision to purchase ebooks for your media center? (multiple responses permitted)
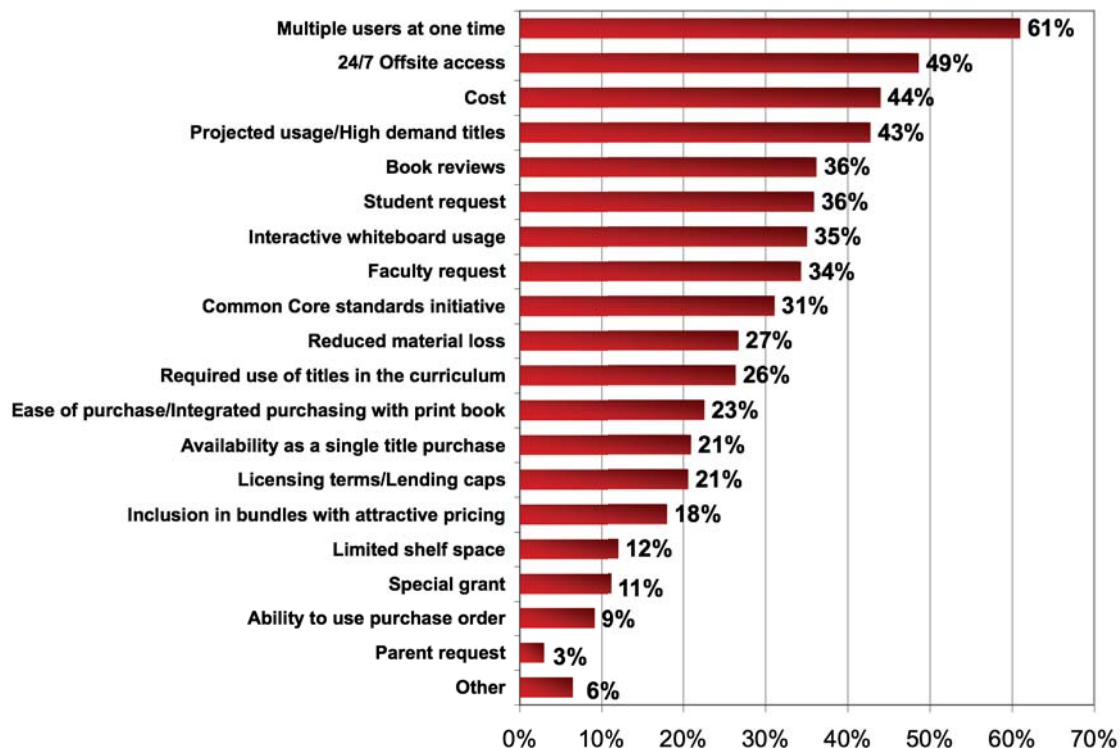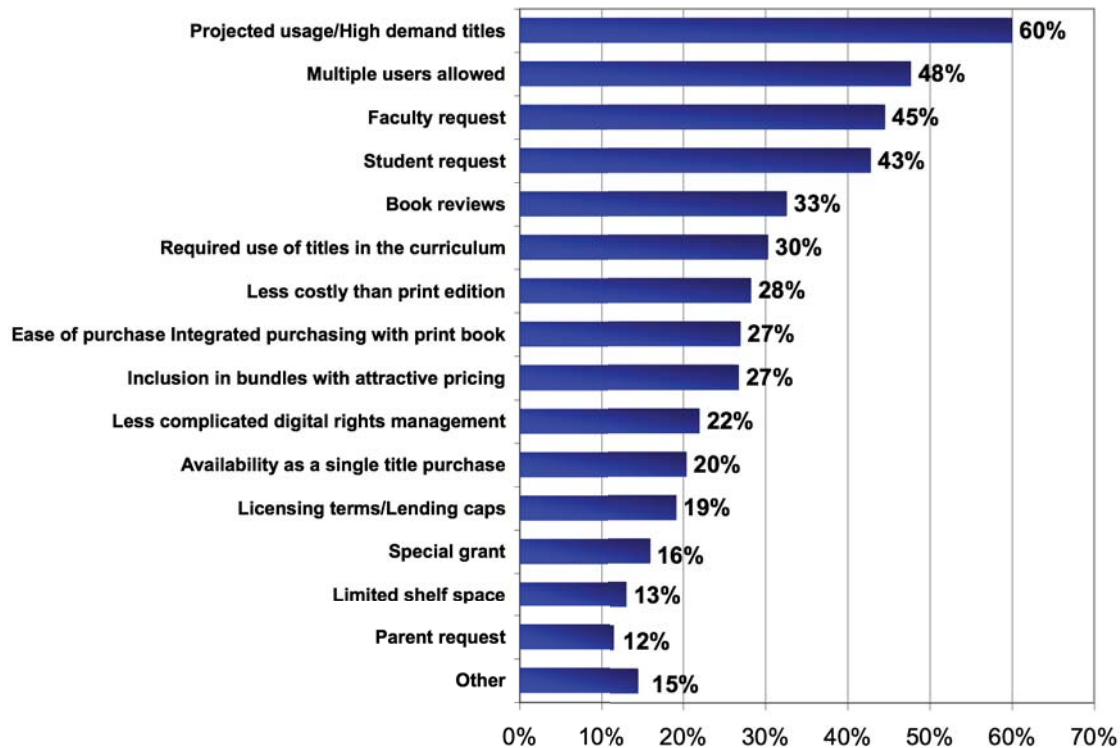*% of school libraries*

Figure 23. What factors influence your decision to purchase ebooks for your media center? (multiple responses permitted)
% of school libraries (2011 survey)

"24/7 offsite access," "student request," and "required use in curriculum" are especially high among high schools. "Interactive whiteboard usage" and "faculty request" are higher among elementary schools.

Table 21. What factors influence your decision to purchase an ebook for your media center? (multiple responses permitted)
*% of school libraries by type of school and geographic region*

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Multiple users at one time	58%	66%	64%	60%	80%	63%	61%	58%	61%
24/7 Offsite access	41%	50%	64%	48%	55%	56%	49%	39%	50%
Cost	40%	51%	45%	44%	51%	53%	38%	35%	48%
Projected usage/High demand titles	36%	50%	50%	43%	46%	53%	44%	35%	41%
Book reviews	34%	43%	36%	37%	33%	44%	40%	28%	35%
Student request	29%	45%	40%	34%	51%	51%	34%	27%	35%
Interactive whiteboard usage	50%	15%	14%	37%	14%	36%	32%	27%	41%
Faculty request	36%	32%	28%	34%	35%	32%	41%	23%	37%
Common Core standards initiative	37%	20%	25%	33%	10%	30%	32%	29%	32%
Reduced material loss	27%	23%	25%	28%	20%	20%	19%	27%	35%

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Required use of titles in the curriculum	21%	27%	32%	27%	20%	33%	22%	24%	27%
Ease of purchase/Integrated purchasing with print book	20%	20%	26%	22%	38%	21%	26%	15%	25%
Availability as a single title purchase	20%	27%	18%	21%	19%	27%	17%	22%	20%
Licensing terms/Lending caps	21%	23%	17%	21%	19%	30%	13%	14%	25%
Inclusion in bundles with attractive pricing	14%	16%	25%	17%	35%	23%	20%	11%	19%
Limited shelf space	10%	10%	15%	11%	23%	11%	15%	11%	11%
Special grant	12%	12%	12%	12%	1%	14%	14%	9%	9%
Ability to use purchase order	5%	17%	13%	9%	12%	11%	11%	4%	10%
Parent request	2%	3%	2%	3%	4%	4%	0%	5%	3%
Other	7%	7%	6%	7%	6%	4%	2%	13%	7%
2011									
Projected usage/High demand titles	52%	67%	72%	60%	55%	75%	63%	58%	50%
Multiple users allowed	42%	46%	61%	47%	52%	37%	60%	46%	48%
Faculty request	47%	38%	44%	46%	33%	53%	44%	49%	37%
Student request	39%	51%	46%	45%	26%	56%	38%	43%	37%
Book reviews	30%	30%	39%	33%	31%	36%	34%	32%	30%
Required use of titles in the curriculum	29%	29%	32%	30%	33%	22%	49%	32%	24%
Less costly than print edition	23%	29%	34%	27%	38%	19%	32%	37%	29%
Ease of purchase Integrated purchasing with print book	25%	21%	37%	27%	29%	34%	27%	22%	25%
Inclusion in bundles with attractive pricing	23%	27%	33%	25%	50%	27%	28%	29%	26%
Less complicated DRM	18%	26%	24%	22%	26%	26%	23%	26%	18%
Availability as a single title purchase	21%	19%	20%	20%	24%	21%	20%	18%	21%
Licensing terms/Lending caps	17%	30%	15%	20%	21%	28%	21%	10%	15%
Special grant	17%	18%	13%	17%	7%	11%	16%	27%	16%
Limited shelf space	10%	14%	17%	13%	19%	12%	17%	25%	7%
Parent request	14%	12%	6%	11%	7%	8%	13%	26%	8%
Other	17%	10%	13%	15%	14%	10%	17%	19%	15%

Ebook Purchasing Terms

When libraries purchase ebooks, more often than not (66%, up from 63% last year and up from 54% in 2010) they purchase "perpetual access." "Concurrent use/access" continues to grow, this time from 16% to 30% (it had been at 5% in 2010). As we have seen elsewhere in this report, multiple access is a big issue for school libraries. "Subscription" continues to decline in popularity, dropping from 20% to 18% (and had been as high as 31% in 2010). "Patron-driven acquisition," a popular option in other types of libraries, displayed modest gains from 4% to 8%.

Figure 24. What type of purchasing terms does your library typically use when acquiring ebooks? (multiple responses permitted)
% of school libraries
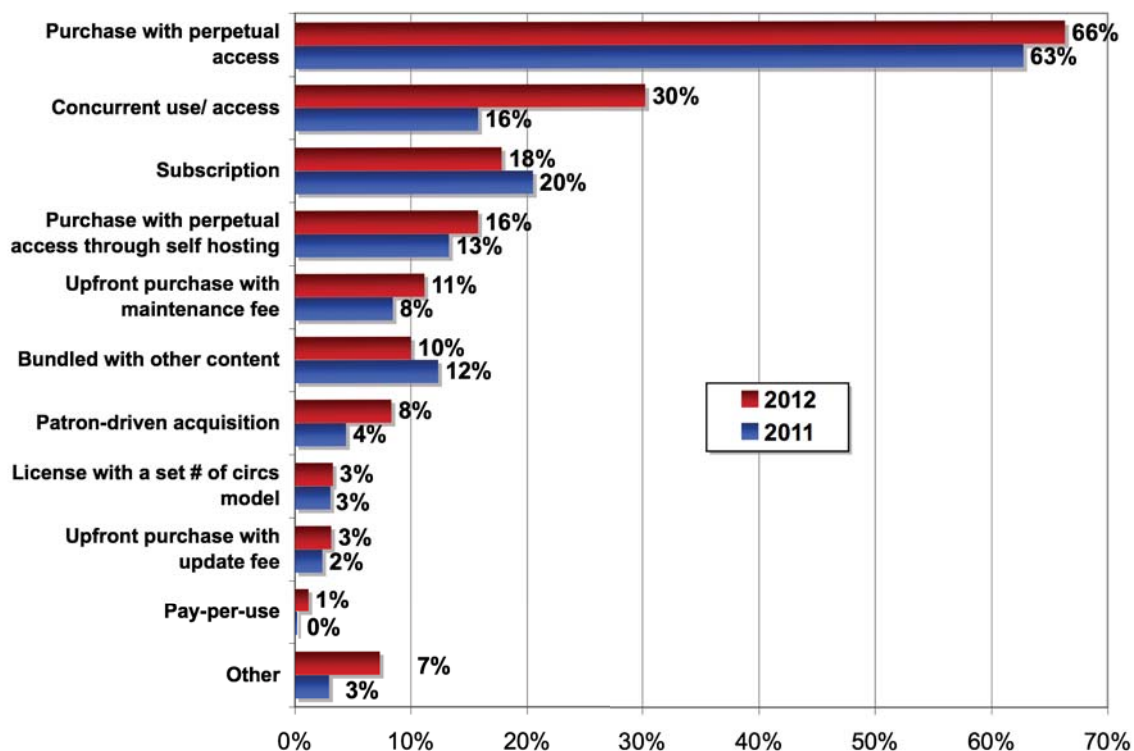
All three school levels are most likely to purchase ebooks with perpetual access. High schools are more likely than the lower grades to purchase "concurrent use/access" (34%, up from 29%, up from just 5% in 2010), and are also more likely to purchase ebooks via subscription (27%, up from 21%). High schools are also experimenting with patron-driven acquisition at slightly higher levels than other libraries (10%, up from 7%).

Table 22. What type of purchasing terms does your library typically use when acquiring ebooks? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Purchase with perpetual access	66%	69%	65%	66%	67%	74%	64%	55%	70%
Concurrent use/ access	28%	31%	34%	31%	30%	32%	29%	30%	31%
Subscription	13%	16%	27%	17%	38%	22%	16%	15%	18%
Purchase with perpetual access through self hosting	16%	14%	16%	15%	20%	18%	19%	21%	10%
Upfront purchase with maintenance fee	3%	14%	26%	9%	30%	13%	14%	13%	7%
Bundled with other content	7%	8%	17%	9%	21%	16%	12%	5%	9%
Patron-driven acquisition	8%	5%	10%	7%	21%	11%	7%	5%	9%
License with a set # of circs model	4%	4%	1%	3%	2%	4%	1%	1%	6%
Upfront purchase with update fee	3%	3%	4%	3%	2%	5%	1%	7%	2%
Pay-per-use	0%	6%	2%	1%	2%	1%	2%	1%	1%
Other	9%	6%	4%	8%	3%	5%	6%	15%	5%
2011									
Purchase with perpetual access	63%	60%	65%	64%	61%	76%	57%	56%	61%
Subscription	20%	15%	21%	18%	42%	16%	27%	12%	23%
Concurrent seat access	9%	8%	29%	16%	18%	21%	11%	16%	14%
Purchase with perpetual access through self hosting	12%	12%	18%	14%	13%	16%	17%	6%	11%
Bundled with other content	12%	5%	15%	11%	18%	7%	16%	21%	11%
Upfront purchase with maintenance fee	1%	12%	21%	8%	18%	7%	12%	14%	5%
User-driven acquisition	3%	4%	7%	4%	13%	8%	5%	1%	3%
License with a set # of circs model	3%	3%	2%	3%	5%	4%	2%	3%	3%
Upfront purchase with update fee	1%	1%	4%	2%	11%	4%	3%	1%	1%
Pay-per-use	0%	1%	0%	0%	0%	0%	1%	0%	0%
Other	3%	1%	4%	3%	5%	4%	1%	0%	5%

SPONSORED BY:
Follett Library Resources

Consortia Programs

Unlike public or academic libraries, school libraries are not likely to be part of a buying consortium, although participation is increasing slightly (19% are current consortium members, up from 17% last year and 12% in 2010). Only 5% are planning to join one, down from 8%.

Figure 25. Is your library part of a consortium license program for its ebook collection?
*% of school libraries*
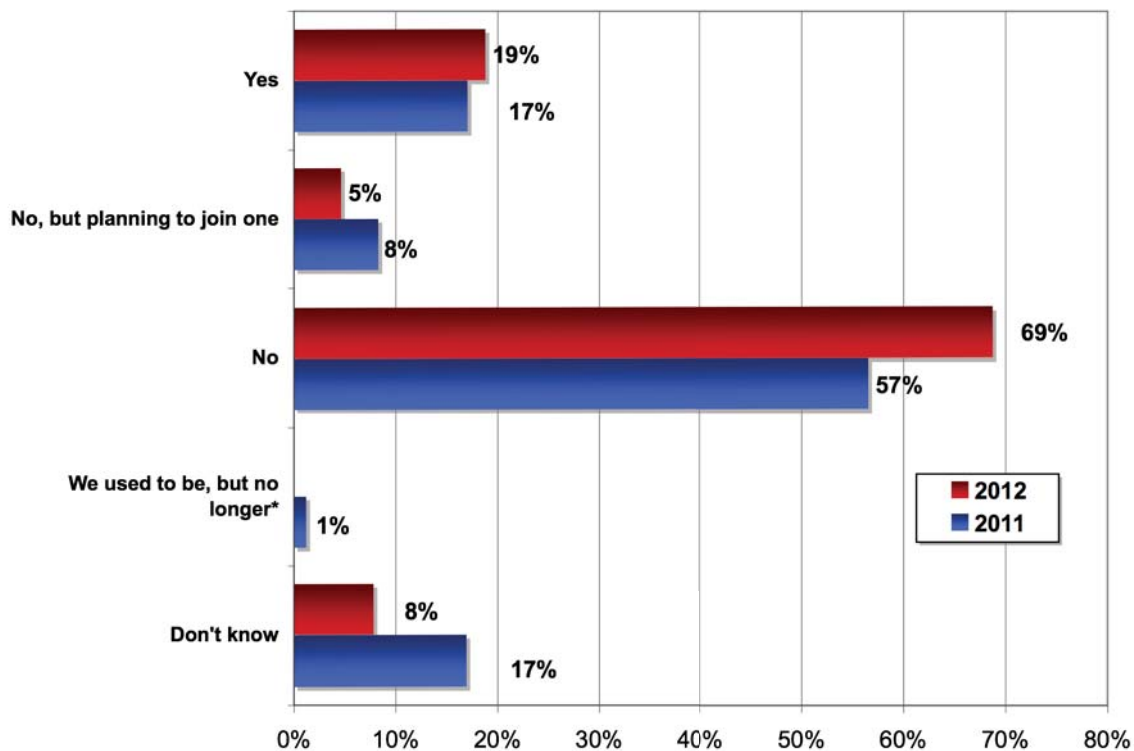
* 2011 survey only

Table 23. Is your library part of a consortium license program for its ebook collection?
% of school libraries by type of school and geographic region

|	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
2012									
Yes	18%	19%	21%	18%	21%	21%	15%	19%	20%
No, but planning to join one	5%	6%	4%	4%	5%	3%	3%	6%	6%
No	67%	69%	71%	69%	72%	68%	78%	65%	66%
Don't know	10%	7%	4%	8%	2%	8%	4%	10%	9%
2011									
Yes	17%	13%	19%	17%	22%	12%	18%	19%	12%
We used to be, but no longer	1%	2%	0%	1%	0%	1%	1%	0%	1%
No, but will in future	8%	7%	10%	8%	9%	14%	9%	6%	14%
No	53%	66%	59%	56%	60%	61%	43%	55%	61%
Don't know	21%	13%	12%	18%	9%	13%	29%	19%	13%

Of the subset of school libraries that are part of a consortium, more than one-half (54%, up from 51% last year) say they also purchase ebooks independently of the consortium.

Figure 26. If yes, does your library also buy ebooks independently?
% of school libraries that are part of a consortium program
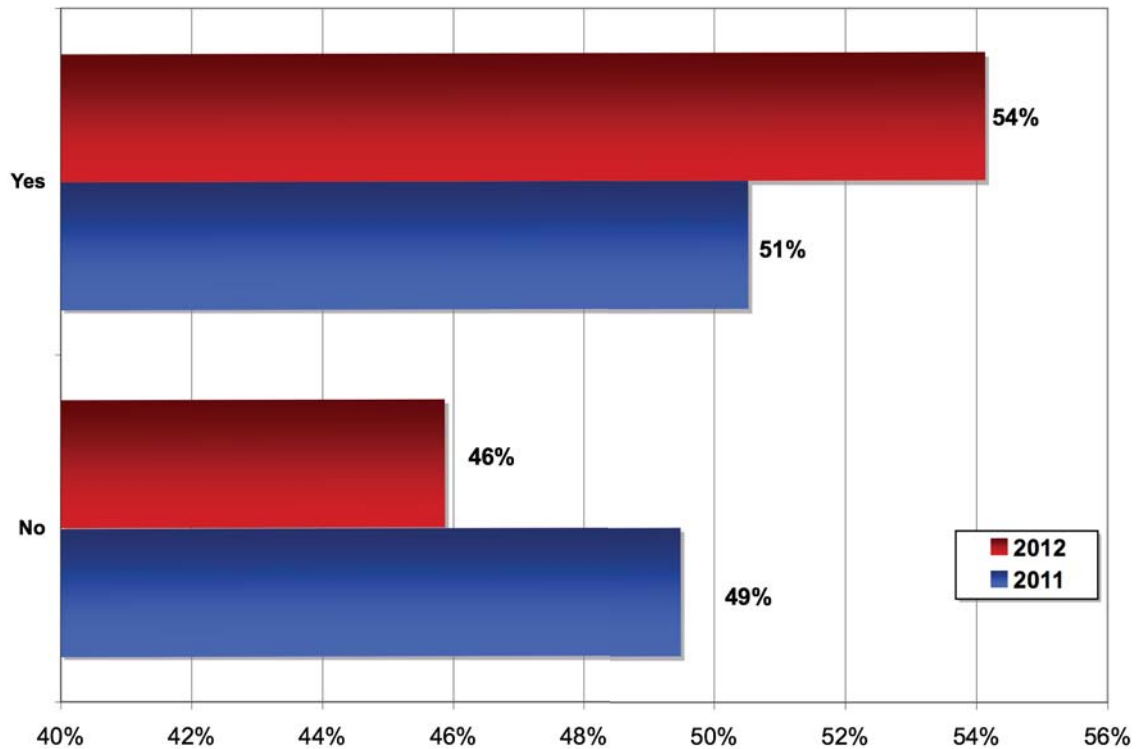
This year we asked a follow-up question to gauge how many ebooks libraries buy independently of the consortium. Consortium members purchase a mean of 220.6 ebooks (median: 39.4) outside of the consortium.

Figure 27. If part of a consortium, approximately how many ebooks has your library bought or licensed independently?
% of school libraries that are part of a consortium
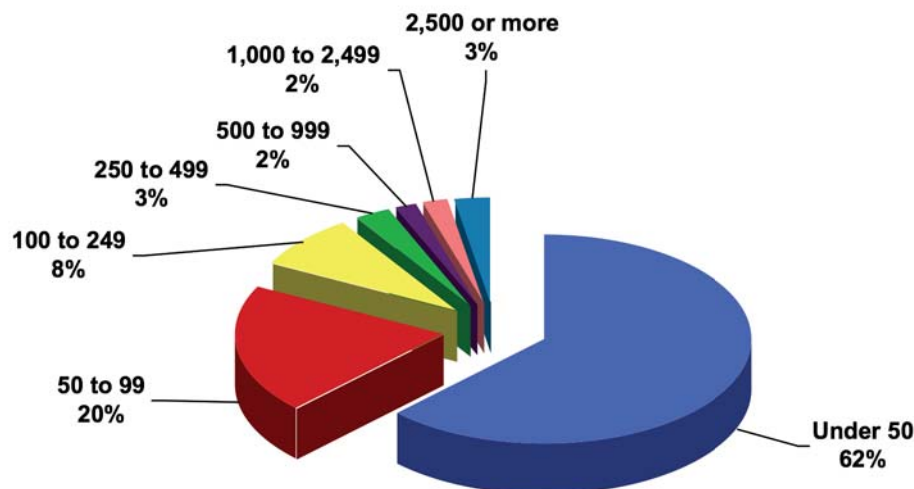
Usage Statistics

Another new question we added to our 2012 survey asked if school libraries were able to track circulation or usage statistics through their school district, state, or consortium. Just under one-half (48%) of school libraries were, 34% were not, and 18% could but "not always." As with so many other aspects of ebooks, the accessibility of usage stats depends on what the vendor allows. Cloud access also makes usage statistics hard to gauge.

Figure 28. Is your library able to track circulation/usage statistics for ebooks available through the district, state or consortium?
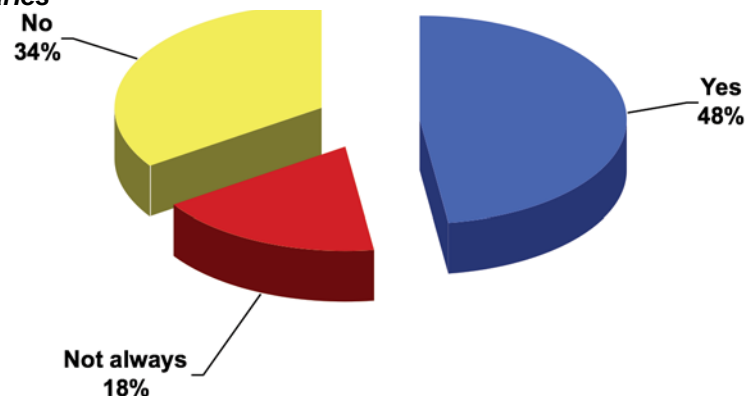*% of school libraries*

Table 24. Is your library able to track circulation/usage statistics for ebooks available through the district, state or consortium?
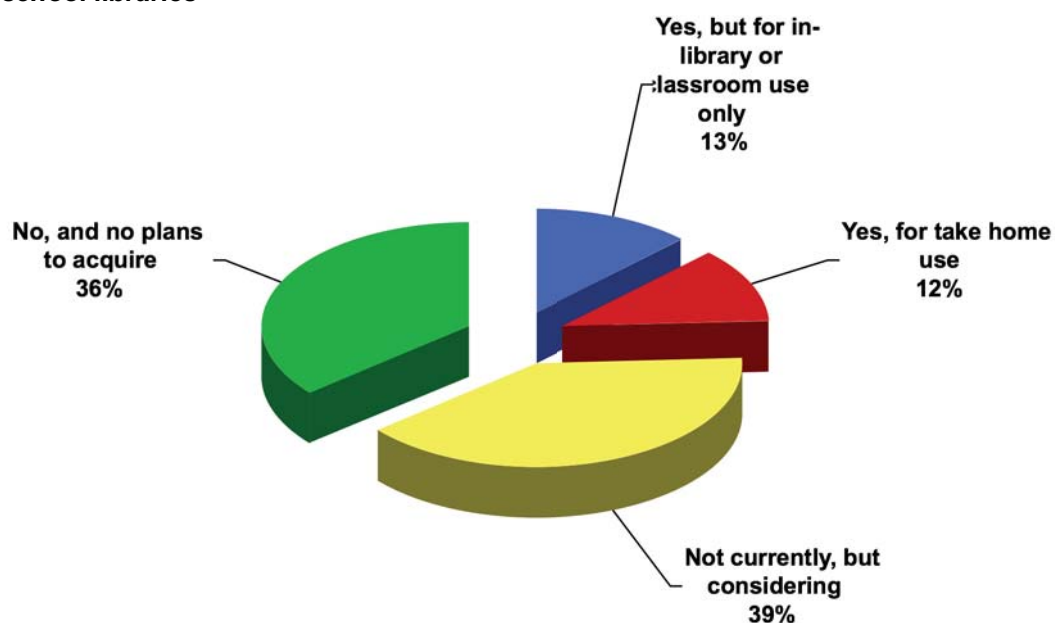*% of school libraries by type of school and geographic region*

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Yes	50%	46%	42%	48%	42%	59%	49%	43%	44%
Not always	14%	19%	23%	18%	20%	14%	20%	9%	23%
No	36%	35%	35%	34%	38%	28%	31%	48%	33%

Hardware Circulation

Last year, fewer than one in five school libraries circulated hardware ereaders. This year, it's up to one in four. Note that we rephrased the question this year from "Does your library circulate preloaded ereading devices?" in previous surveys to "Does your library have ereading devices available for students to borrow?" in our 2012 survey. We removed "preloaded" from the question in order to ask some follow-up questions. Last year, 17% circulated hardware ereaders at all, and this year we found that 13% circulate them for in-classroom use only, while another 12% allow them to be taken home. Thirty-nine percent are considering it (virtually unchanged from 40% last year), while 36% do not and have no plans to.

Figure 29. Does your library have ereading devices for students to borrow?
% of school libraries

High schools and schools with the largest materials budgets are most likely to circulate ereading devices for take-home use. In-library/classroom use is most common in middle schools. Elementary schools are the least likely to have ereading devices on hand at all.

Table 25. Does your library have ereading devices for students to borrow?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Yes, but for in-library or classroom use only	12%	21%	9%	12%	11%	8%	16%	16%	10%
Yes, for take home use	5%	17%	22%	10%	28%	24%	11%	10%	7%
Not currently, but considering	38%	38%	42%	40%	36%	44%	34%	31%	45%
No, and no plans to acquire	45%	25%	28%	38%	25%	24%	38%	42%	38%

Of those school libraries that do circulate ereading devices, the mean number of devices they maintain for circulation is 17 (median 7). One-fourth of respondents circulate 20 or more. In last year's survey, the mean was 11 devices (median 6).

Figure 30. If yes, how many ereading devices does your library have available?
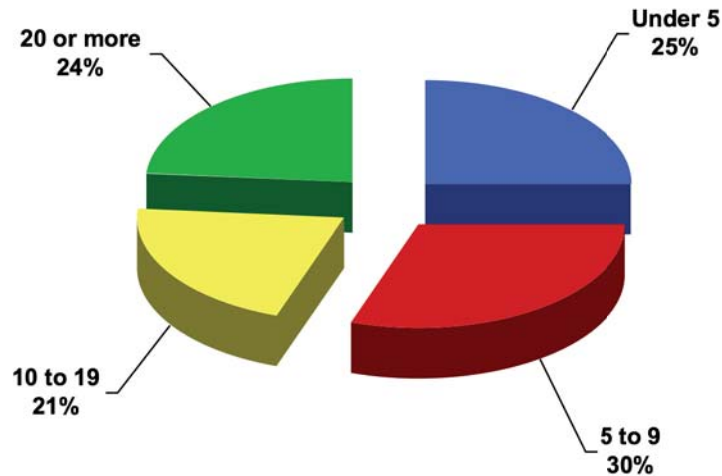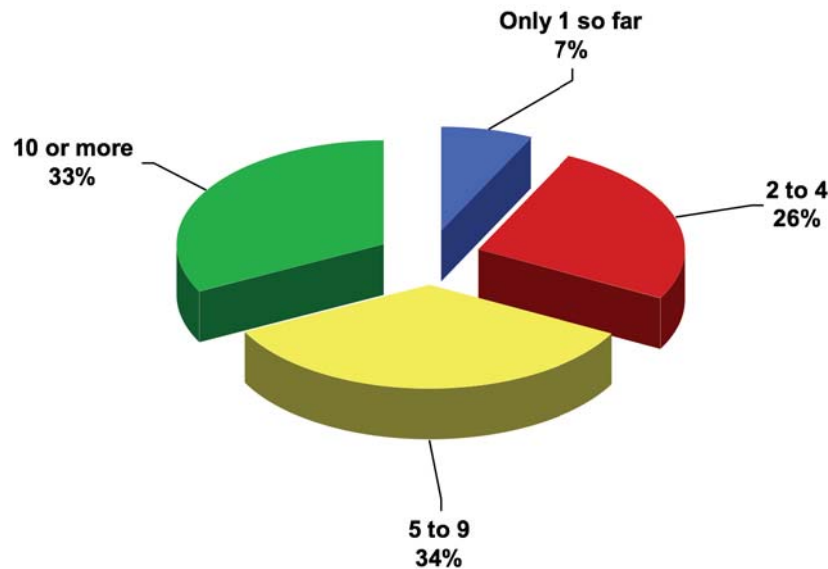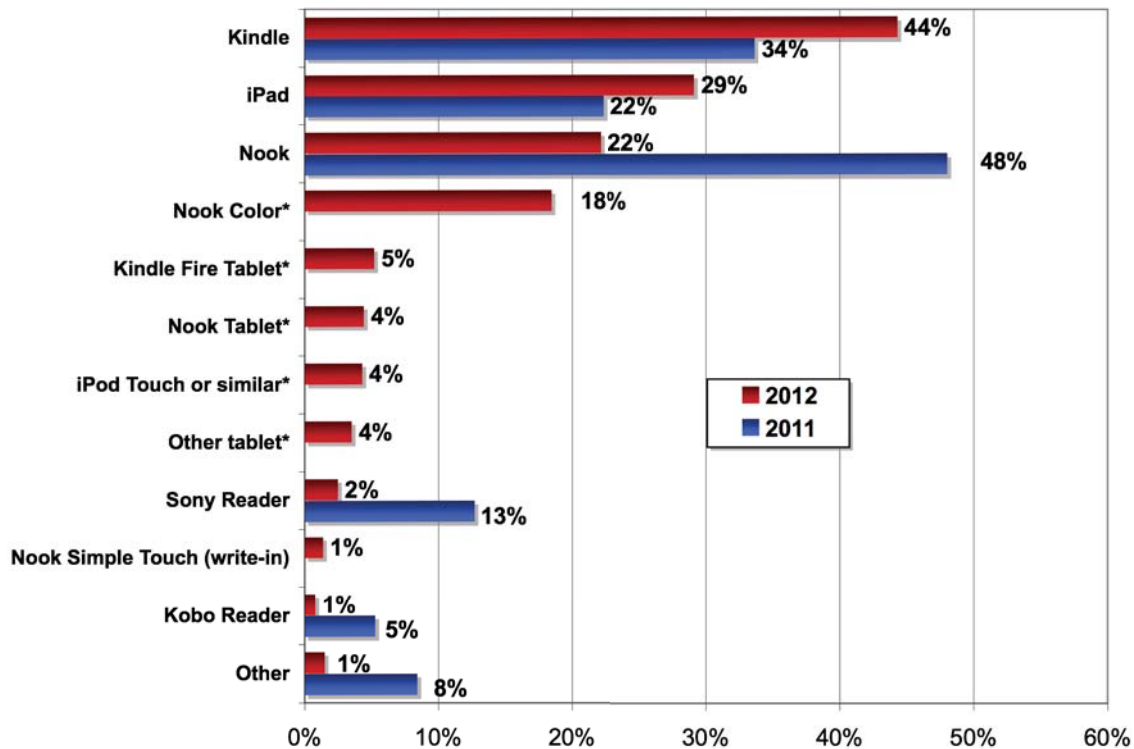*% of school libraries that circulate ereading devices*

Figure 31. If yes, how many preloaded ereading devices does your library maintain?
% of school libraries that circulate preloaded ereading devices (2011 survey)

For the 25% of school libraries that circulate ereading devices, the Kindle has pulled ahead dramatically, climbing to 44% of respondents, from 34% last year. The iPad gained some ground, rising to 29% from 22%, while the Barnes & Noble Nook took a tumble from 48% to 22%.

Figure 32. If yes, which ereading device(s) does your library currently have available?
% of school libraries circulating ereading devices (multiple responses permitted)

Added in 2012 survey.

In our 2012 survey, we asked a follow-up question to see if libraries that circulate ereaders preload ebooks on the devices or if they allow students to download ebooks themselves. For a variety of logistical reasons, three-fourths (74%) preload ebooks on the devices, 10% let users do it themselves, while 16% say they offer a mixture of both.

Figure 33. If your library circulates ereaders, are the devices preloaded with ebooks or are borrowers allowed to download ebooks to a checked out device?
% of school libraries that circulate ereaders
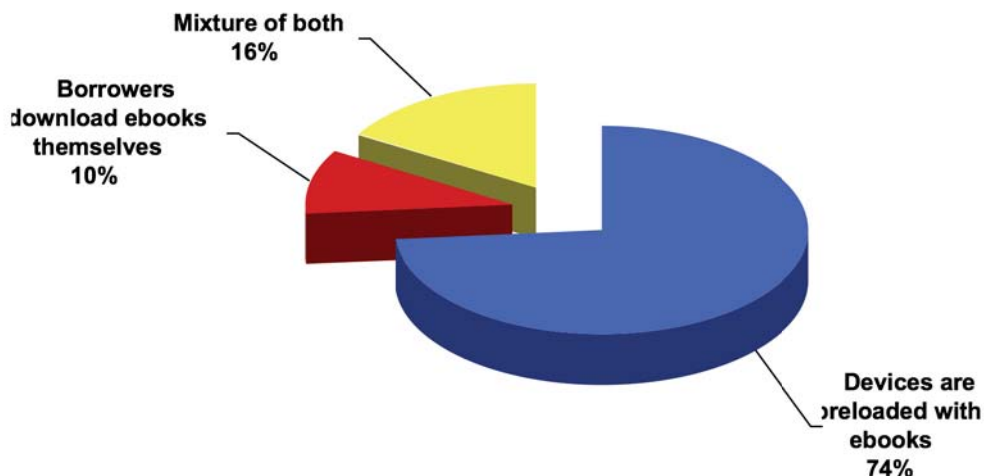
Although the data are too thin for this question to cross-tabulate by type of school or budget, high school libraries were somewhat more likely to allow users to download ebooks themselves.

We also asked a follow-up question of those libraries that specifically circulate tablets (like the iPad) asking if they preload other educational apps or enhanced ebooks on the tablets. (Note that this works out to 38% of the 25% that circulate ereading devices at all—or 9.5% of all school libraries surveyed.) So of that group, 61% preload specific book apps or enhanced ebooks, while 55% preload interactive educational tools like TouchPress[6] interactive ebooks. One-fourth of school libraries that circulate tablets do not preload any supplementary material on them.

Figure 34. If your library circulates tablets, do you load educational apps or enhanced ebooks on your school's tablets?
% school libraries that circulate tablets
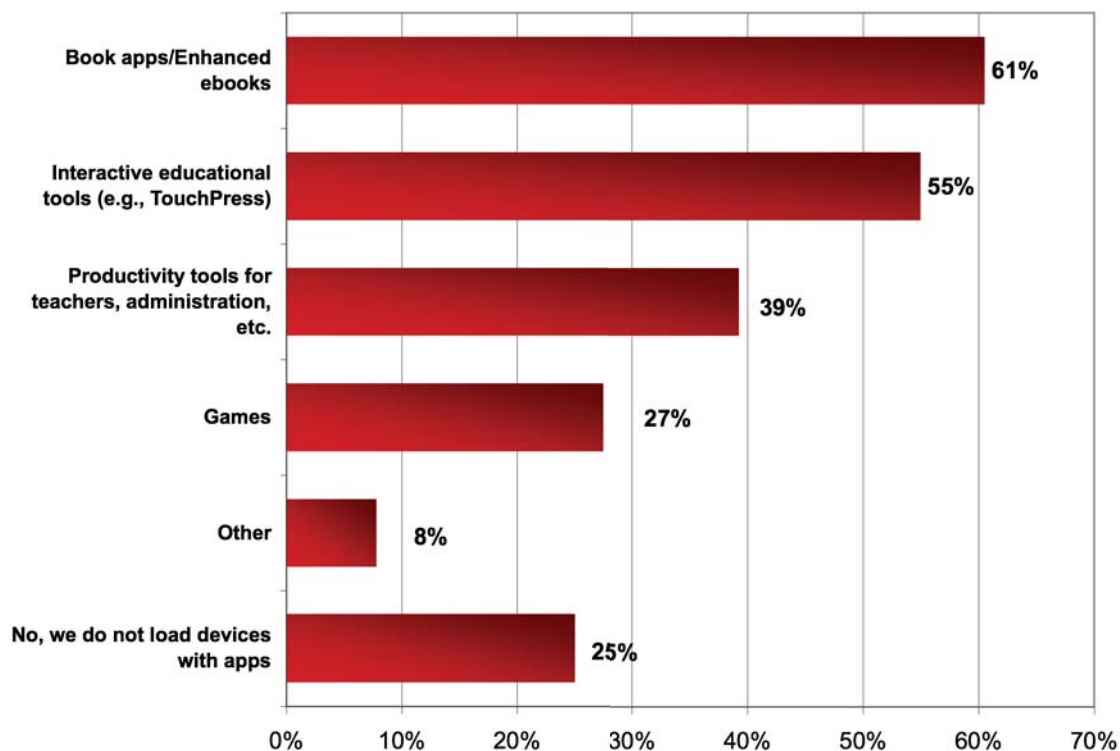
Note that we asked an open-ended question about how school libraries maintain hardware ereaders. A sampling of those verbatim comments can be found at the end of this section.

---

[6] http://www.touchpress.com/.

Ebook Circulation Trends

The ebook circulation figures below compare data from 2011 and 2012.

Ebook Circulation

In the 2010–2011 school year (see Figure 35), the mean ebook circulation among school libraries was 421 (median 5). Compare this to mean ebook circulation for the 2009–2010 school year of 306 (see Figure 36). Of particular note is that the percentage of libraries reporting a circulation of zero dropped from 74% last year to 34% this year (Zero figures may be from libraries whose ebooks don't traditionally "circulate." For instance, reference and other titles accessed online.) So ebook circulation is increasing modestly in school libraries—certainly not as dramatically as in public libraries.

Figure 35. What was your ebook circulation in the 2010–2011 school year?
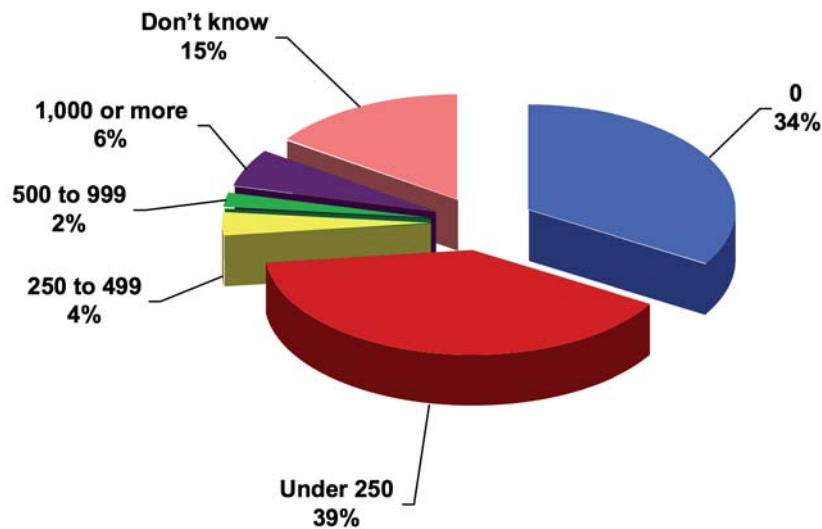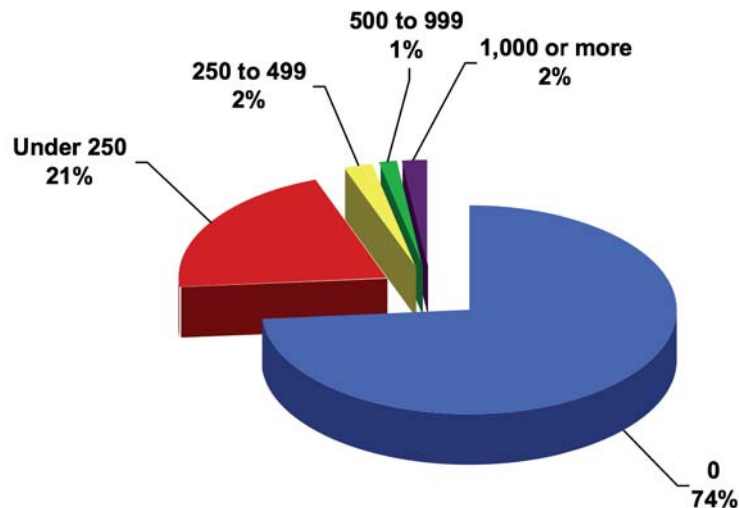*% of school libraries*

Figure 36. What was your ebook circulation in the 2009–2010 school year?
% of school libraries (2011 survey)

SPONSORED BY:
Follett Library Resources

High schools report the highest mean ebook circulation (799)—but as the medians indicate, watch out for some outliers, particularly among the higher-budget libraries.

Table 26. What was your ebook circulation in the last school year?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
0	40%	29%	22%	35%	19%	38%	40%	40%	24%
Under 250	38%	48%	36%	40%	40%	37%	40%	38%	41%
250 to 499	3%	4%	6%	4%	4%	3%	2%	2%	6%
500 to 999	1%	2%	5%	2%	6%	2%	1%	3%	3%
1,000 or more	3%	7%	12%	5%	13%	5%	5%	5%	7%
Don't know	16%	10%	20%	14%	17%	15%	12%	12%	20%
Mean	90	449	799	381	1,054	425	338	217	591
Median	2	10	25	5	50	3	5	2	10
2011									
0	64%	64%	43%	60%	53%	69%	54%	76%	51%
Less than 500	31%	34%	52%	34%	41%	25%	41%	22%	42%
500 to 999	2%	0%	0%	2%	6%	5%	2%	2%	0%
1,000 to 4,999	0%	0%	5%	2%	0%	1%	1%	0%	2%
5,000 to 9,999	0%	0%	0%	0%	0%	0%	0%	0%	0%
10,000 or more	2%	2%	0%	2%	0%	0%	2%	0%	4%
Mean	296	379	177	323	84	84	309	17	557
Median	0	0	4	0	0	0	0	0	0

Ebook Circulation Increasing/Decreasing

Sixty-nine percent of survey respondents expected ebook circulation to increase this year compared to their last school year, up a couple of points from those who expected an increase the previous year. Thirty percent expected circulation to stay about the same. The overall change in circulation expected in the 2011–2012 school year was +48% (the previous year school librarians predicted a 43% increase).

Figure 37. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
% of school libraries
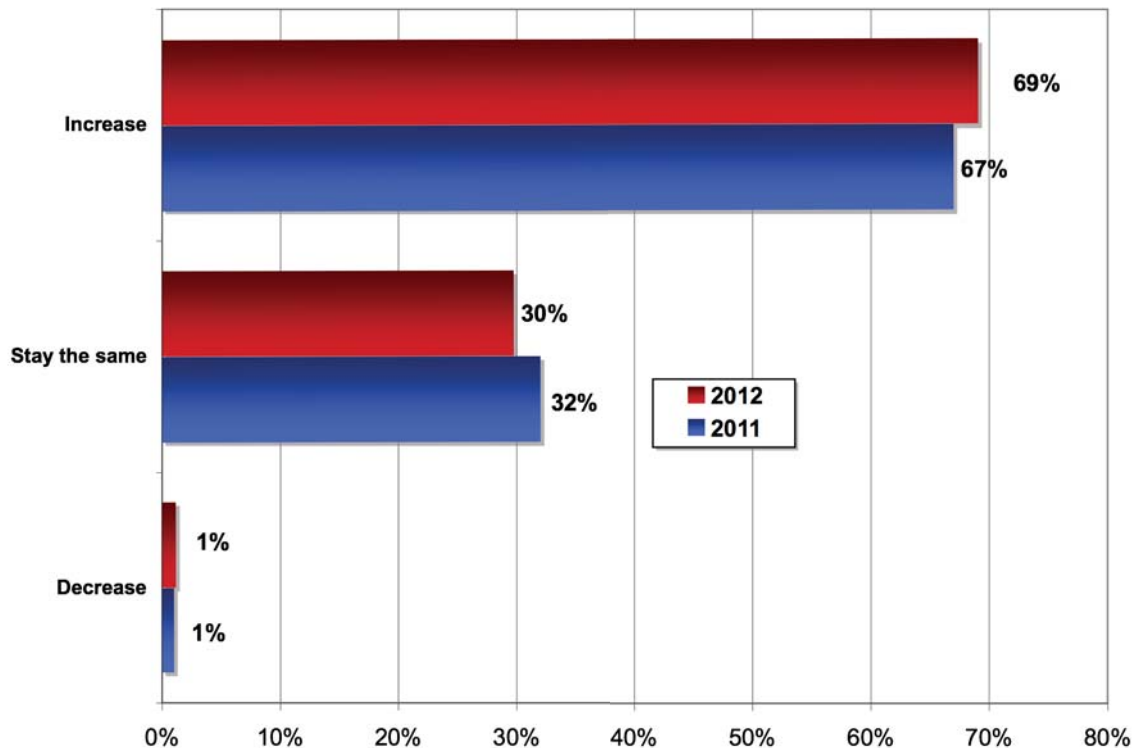
We also asked our respondents to estimate how much of an increase or decrease they expected:

	2011	2012
Average % increase	64%	70%
Average % decrease	44%	34%
Overall % change in ebook circulation expected:	**+43%**	**+48%**

Middle schools remain more bullish on ebook circulation, with those schools expecting an overall 56% increase in ebook circulation next year, up slightly from 54% last year.

Table 27. Compared to last year, do you expect this year's usage of ebooks will increase, stay the same or decrease?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Increase	70%	69%	65%	69%	67%	80%	64%	68%	68%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%	100%
Under 10%	8%	5%	8%	8%	5%	5%	7%	11%	8%
10% to 24%	20%	31%	36%	24%	40%	27%	22%	18%	30%
25% to 49%	19%	8%	16%	16%	15%	18%	7%	17%	19%
50% to 74%	14%	19%	12%	13%	13%	17%	17%	9%	12%
75% to 99%	5%	4%	4%	5%	3%	5%	7%	4%	4%
100% or more	35%	36%	24%	35%	25%	29%	42%	40%	30%
Average % increase	61%	83%	51%	69%	88%	53%	67%	105%	60%
Stay the same	28%	29%	35%	30%	33%	20%	33%	32%	31%
Decrease	1%	2%	0%	1%	0%	0%	3%	0%	1%
Average % decrease	20%	51%	0%	34%	0%	0%	75%	0%	16%
Overall Percent change Expected	+43%	+56%	+33%	+47%	+59%	+42%	+41%	+72%	+41%
2011									
Increase	64%	71%	67%	66%	77%	73%	70%	57%	65%
By what percent?	100%	100%	100%	100%	100%	100%	100%	100%	100%
Under 10%	10%	12%	15%	12%	7%	12%	6%	11%	14%
10% to 24%	25%	26%	33%	26%	52%	24%	35%	33%	26%
25% to 49%	10%	18%	12%	11%	15%	13%	12%	8%	11%
50% to 74%	13%	10%	14%	14%	7%	9%	9%	5%	19%
75% to 99%	2%	0%	4%	2%	4%	5%	0%	0%	1%
100% or more	42%	34%	22%	37%	15%	36%	39%	43%	32%
Average % increase	69%	76%	53%	67%	37%	59%	105%	63%	49%
Stay the same	35%	29%	32%	32%	23%	26%	29%	43%	33%
Decrease	1%	0%	1%	1%	0%	1%	1%	0%	2%
Average % decrease	50%	0%	0%	44%	0%	15%	0%	0%	50%
Overall Percent Change Expected	+43%	+54%	+36%	+44%	+28%	+43%	+73%	+36%	+31%

Barriers to Ebook Consumption

Last year's top barrier to ebook consumption by school library users—"[students] unaware of ebook availability"—drops 10 percentage points to 38%, and is down substantially from 64% in 2010. So students are becoming increasingly aware that ebooks exist. The number one barrier, however, is now "limited access to ereading devices" (either at school or at home), which is unchanged from last year at 40%. This year, we added "too few titles available" and it was selected by 40% of respondents. "In demand titles not in ebook format for libraries" rises two points to 27%. "Technology issues" and "lack of training" are tied at 29%. And "users prefer print books" is up from 22% to 26%.

For clarity's sake, we present the responses to the 2012 survey in Figure 38 and the responses to 2011's survey in Figure 39.

Figure 38. What hinders the public from reading your media center's ebook content? (multiple responses permitted)
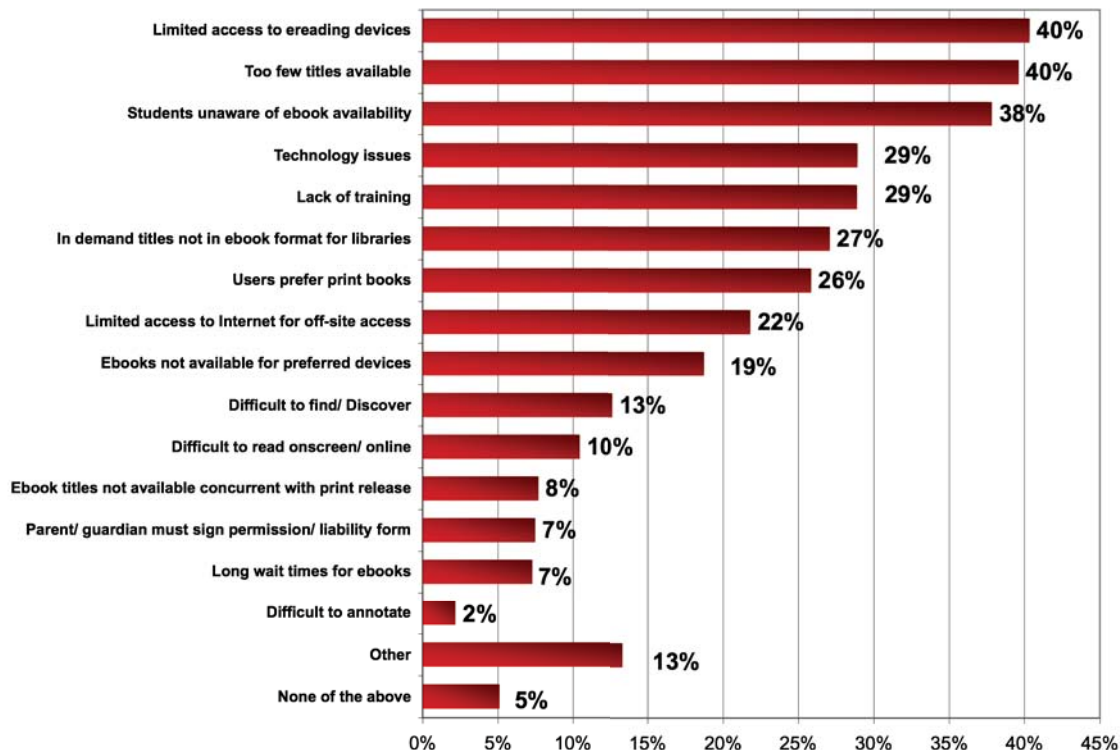*% of school libraries*

Figure 39. What hinders the public from reading your media center's ebook content? (multiple responses permitted)
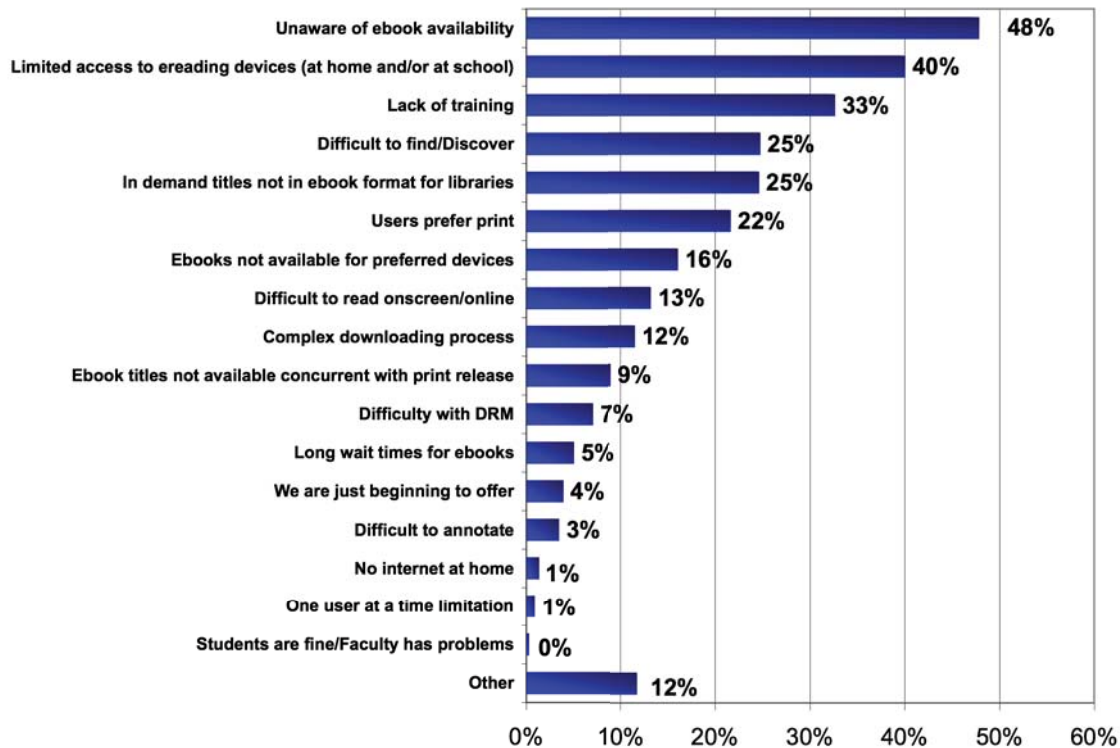*% of school libraries (2011 survey)*

	Percentage
Unaware of ebook availability	48%
Limited access to ereading devices (at home and/or at school)	40%
Lack of training	33%
Difficult to find/Discover	25%
In demand titles not in ebook format for libraries	25%
Users prefer print	22%
Ebooks not available for preferred devices	16%
Difficult to read onscreen/online	13%
Complex downloading process	12%
Ebook titles not available concurrent with print release	9%
Difficulty with DRM	7%
Long wait times for ebooks	5%
We are just beginning to offer	4%
Difficult to annotate	3%
No internet at home	1%
One user at a time limitation	1%
Students are fine/Faculty has problems	0%
Other	12%

Table 28. What hinders the public from reading your media center's ebook content? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Limited access to ereading devices (at home and/or at school)	38%	47%	41%	42%	20%	37%	30%	37%	49%
Too few titles available	40%	38%	39%	41%	31%	53%	37%	41%	35%
Students unaware of ebook availability	30%	39%	50%	37%	42%	43%	37%	44%	33%
Technology issues (e.g. slow/complex to download, district restrictions, etc.)	27%	30%	29%	31%	11%	29%	28%	30%	29%
Lack of training	29%	27%	27%	30%	23%	31%	20%	33%	31%
In demand titles not in ebook format for libraries	23%	32%	28%	27%	30%	32%	31%	26%	23%
Users prefer print books	26%	23%	31%	26%	27%	26%	34%	25%	21%
Limited access to Internet for off-site access	24%	25%	17%	24%	4%	15%	20%	13%	31%

| | **Type of School** | | | **Public or Private** | | **Geographic Region** | | | |
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
Ebooks not available for preferred devices	17%	24%	21%	19%	14%	23%	16%	18%	19%
Difficult to find/Discover	9%	13%	22%	13%	15%	22%	13%	9%	10%
Difficult to read onscreen/online	9%	9%	14%	11%	8%	10%	16%	11%	7%
Ebook titles not available concurrent with print release	4%	10%	13%	7%	9%	9%	7%	8%	7%
Parent/guardian must sign permission/ liability form	3%	16%	11%	8%	7%	9%	7%	6%	8%
Long wait times for ebooks	6%	7%	8%	7%	5%	10%	9%	8%	5%
Difficult to annotate	2%	1%	5%	2%	8%	2%	2%	1%	3%
Other	15%	9%	11%	14%	9%	9%	11%	16%	15%
None of the above	5%	2%	7%	5%	14%	2%	7%	5%	5%
2011									
Unaware of ebook availability	44%	42%	62%	49%	48%	46%	52%	35%	50%
Limited access to ereading devices (at home and/or school)	36%	48%	42%	41%	34%	44%	45%	40%	36%
Lack of training	33%	29%	31%	33%	25%	44%	32%	33%	27%
Difficult to find/ Discover	22%	27%	32%	24%	39%	22%	26%	17%	29%
In demand titles not in ebook format for libraries	24%	32%	23%	26%	20%	26%	24%	26%	24%
Users prefer print	18%	19%	30%	22%	16%	16%	30%	22%	21%
Ebooks not available for preferred devices	14%	25%	16%	16%	20%	18%	17%	13%	16%
Difficult to read onscreen/online	13%	20%	11%	13%	18%	14%	12%	17%	12%
Complex downloading process	13%	9%	11%	11%	9%	14%	9%	18%	9%
Ebook titles not available concurrent with print release	9%	7%	9%	9%	9%	13%	9%	14%	5%
Difficulty with DRM	3%	14%	9%	7%	11%	13%	9%	3%	3%
Long wait times for ebooks	3%	11%	7%	5%	0%	3%	4%	14%	4%
We are just beginning to offer	5%	4%	3%	3%	7%	1%	1%	6%	7%
Difficult to annotate	2%	2%	6%	3%	20%	4%	3%	3%	4%
No internet at home	2%	0%	0%	1%	0%	0%	0%	0%	3%
One user at a time limitation	1%	0%	1%	1%	0%	1%	0%	0%	2%
Students are fine/ Faculty has problems	0%	1%	0%	0%	0%	0%	1%	1%	0%
Other	11%	13%	13%	11%	14%	10%	8%	22%	12%

Technical Problems

Two-thirds of this year's respondents (74%) say that users rarely or never report having technical problems downloading ebooks (down from 79% last year). "Sometimes" have technical problems climbed seven points to 22% this year and "often" dropped two ticks to 5%.

Figure 40. How often do your users report technical problems when downloading an ebook?
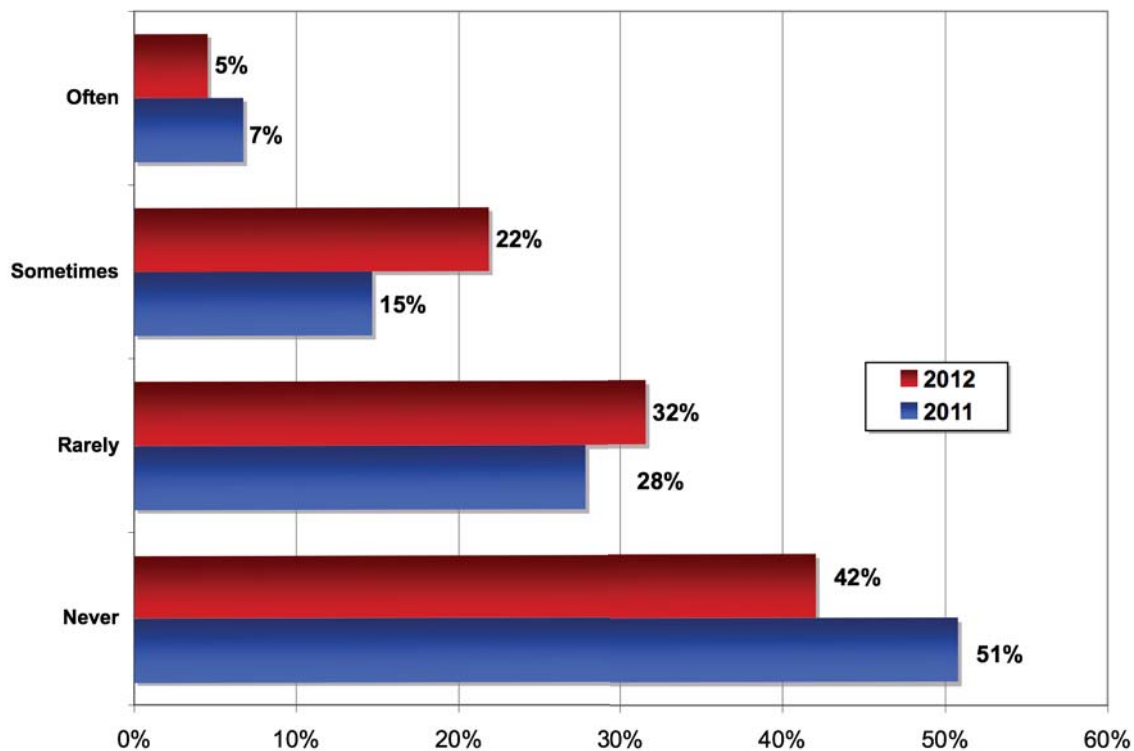*% of school libraries*

Table 29. How often do your users report technical problems when downloading an ebook?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
2012									
Often	3%	7%	3%	5%	3%	1%	7%	3%	5%
Sometimes	20%	23%	22%	22%	14%	19%	20%	30%	20%
Rarely	30%	31%	36%	30%	46%	35%	32%	23%	34%
Never	46%	39%	40%	43%	37%	45%	41%	44%	41%
2011									
Often	8%	4%	4%	6%	5%	7%	9%	8%	3%
Sometimes	13%	17%	13%	15%	18%	17%	17%	16%	12%
Rarely	23%	36%	34%	27%	35%	28%	36%	24%	25%
Never	55%	43%	49%	52%	43%	48%	38%	52%	60%

General Conclusions

In past years, the decision to add ebooks to school library collections has been driven by expected user demand, but the criteria that librarians look for today are mostly logistical in nature: the ability for a title/vendor/purchasing model to support multiple users has become a major issue, as has the ability to offer 24/7 offsite access to titles. Access to titles in the collection has become a major issue for librarians. And, of course, there are cost issues.

Libraries are increasingly looking to purchase perpetual access, and subscription-based purchasing terms are becoming increasingly undesirable. Libraries want to own the books they purchase, not license them. Patron-driven acquisition, growing in popularity among public and academic libraries, is still rare in school libraries, but is modestly growing, especially in high schools.

Circulation of ebooks is also increasing modestly, however circulation numbers are sometimes hard for schools to determine with students using cloud access. One-fourth of libraries circulate hardware ereaders, typically with ebooks preloaded on them (saving download hassles for the students). The Kindle has become the favored hardware device to be circulated, while the Nook has fallen out of favor. Some libraries circulate iPads—a pricey option and not for everyone. One other issue that affects the decision of which ereader to circulate: devices that have WiFi connectivity can provide too many distractions for some students, as they find things to do on the Internet instead of reading a given ebook.

Top barriers to students' ebook adoption are lack of access to ereaders, both inside and outside the school, as well as a limited number of titles available. And, it must be pointed out, a substantial portion of students still prefer print.

In Their Own Words...

On our 2012 survey, we added an open-ended question that asked, "How do you handle the day-to-day upkeep of ereading devices (cleaning out student downloads, setting up library defaults and charging)?" Here we present a selection of those verbatim responses (lightly edited).

- As each machine is returned, I clean off any ebooks and any junk files. On tablets, I factory reset them.

- They circulate through the system, with 2-week checkout; done on an as-needed basis.

- I clear history.

- Currently, we must put books on/off the Kindle device and charge it in between uses. For the iPads we are using a new ebook platform integrated into our library management system which automatically "checks in" the ebook on the due date. For our reference ebooks through Gale, they are Web-based so no clean up required.

- I personally have set up the library defaults on the tablets that we have and make sure they are charged before they go out. Chargers are checked out

with the devices. The Nooks have been set up by Barnes and Noble. These have preloaded books bought specifically for a Recent Fiction class.

- I work with a person in the technology department to make sure no personal information is left on tablets before they are checked out again.

- iPads are checked in daily for security quick check; returned weekly and "cleaned" of all student downloads, ebooks returned, etc., before circulating to next patron.

- It's the librarian's responsibility. Use is minimal at the moment

- Library monitors as well as college interns.

- Manual clean-up of screens, shortcuts, apps. Charging with a smart cart. IPads stay plugged into cart and charge individually when battery gets to certain point.

- Mostly through "manage your Kindle" at my Amazon account.

- Our ebooks are through Follett, the student returns the book and it does not have to the cleaned out.

- Our tech department has not given us accounts yet to even use the Kindles. We received the Kindles from grant funds in April 2011 and they are still in the boxes. Tech dept. will not give us wireless access to download our books.

- Parent volunteers.

- The Follett Shelf program automatically checks the books back in via our time settings.

- The Kindles are used with one class and are checked out to them at the beginning of the year. The library doesn't have any that are used on a daily basis.

- We are just beginning this for the past few months we will have student worker to help when it gets unmanageable by library staff and teachers.

- We have a dedicated email account for each device. We reset to this address and clear items upon return.

- We have just started using Follett Shelf ebooks. Our school's iPads are on a cart that is used as a classroom set, not checked out via the library.

4. EBOOKS, PRINT BOOKS, AND BUDGETS

Current Spending on Ebooks

In our 2012 survey, we asked school libraries how much they expect to spend on ebooks in the current fiscal year, as shown in Figure 41 below. Spending figures from our 2011 survey are presented in Figure 42.

On average, libraries spent about $1,200 on ebooks in the 2011–2012 school year.[7] This is up $200 from the previous school year.[8] (Given the differential between the means and the medians [see footnotes], there are some large outliers skewing the means.) Less than one-fourth (22%) of school libraries plan to spend $1,000 or more on ebooks in the current school year.

Figure 41. How much would you estimate your library spent on ebooks in the current school year (2011–2012)?
% of school libraries

---
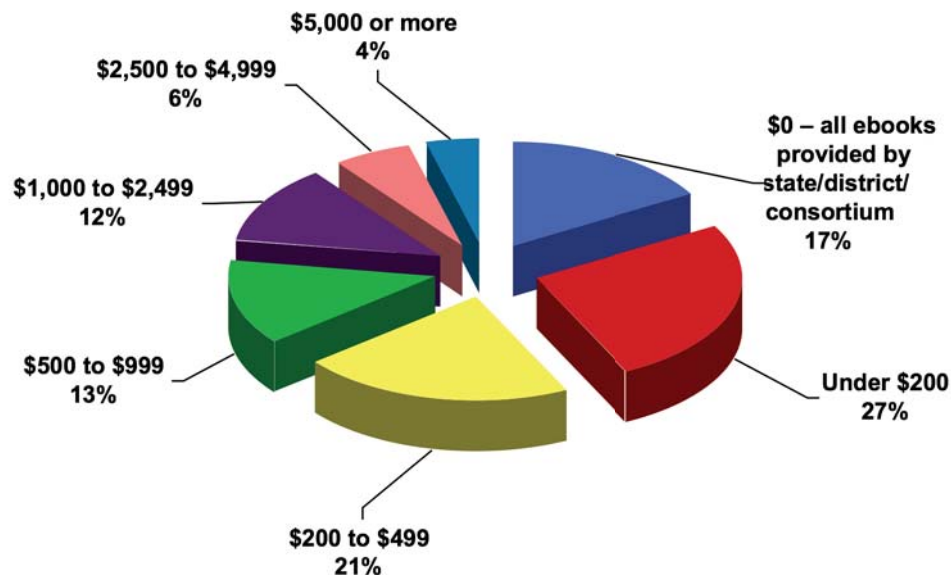
[7] Mean spending on ebooks in current school year (2012 survey): $1,264. Median spending on ebooks in current school year (2012 survey): $301.
[8] Mean spending on ebooks in current school year (2011 survey): $1,020. Median spending on ebooks in current school year (2011 survey): $350.

Figure 42. How much would you estimate your library spent on ebooks in the current school year (2010–2011)?
% of school libraries (2011 survey)
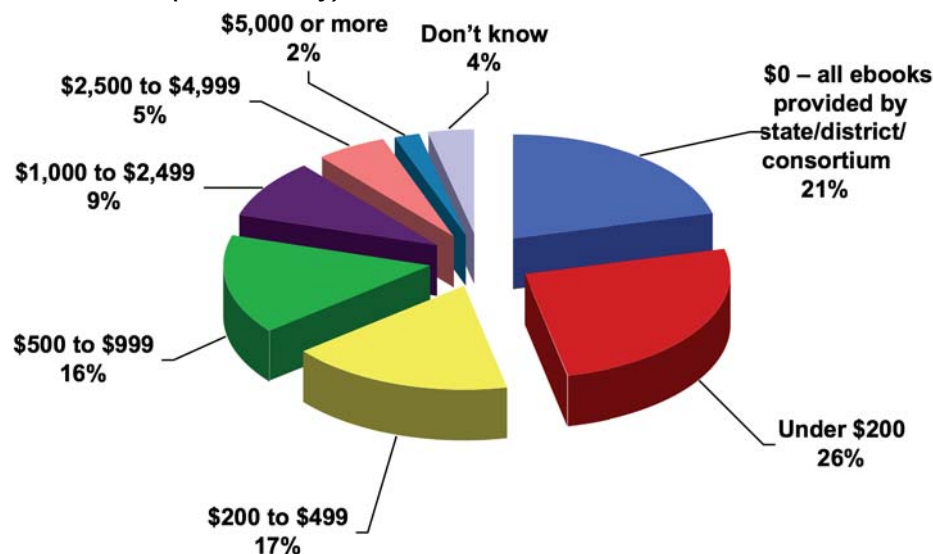
Table 30. Approximately how much does your library expect to spend on ebooks for the current school year (2010–2011)?
% school libraries that offer ebooks by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
$0 (all ebooks provided by state/district/consortium)	20%	17%	12%	18%	4%	9%	10%	23%	21%
Under $200	32%	23%	17%	26%	21%	23%	29%	32%	22%
$200 to $499	21%	33%	18%	21%	24%	28%	24%	18%	18%
$500 to $999	11%	12%	19%	14%	9%	18%	17%	12%	10%
$1,000 to $2,499	11%	8%	16%	12%	16%	9%	15%	7%	14%
$2,500 to $4,999	3%	5%	11%	5%	11%	9%	3%	4%	7%
$5,000 or more	2%	3%	6%	4%	11%	4%	1%	4%	7%
Don't know	0%	0%	0%	0%	3%	0%	1%	1%	0%
Mean $	697	952	1,767	1,186	2,229	1,146	753	901	1,821
Median $	191	293	583	278	481	393	335	169	306
2011									
$0 (all ebooks provided by state/district/consortium)	23%	32%	15%	22%	14%	18%	15%	31%	24%
Under $200	28%	24%	24%	26%	19%	24%	38%	29%	18%
$200 to $499	20%	17%	13%	18%	16%	12%	17%	18%	21%
$500 to $999	18%	11%	16%	14%	12%	24%	16%	5%	14%
$1,000 to $2,499	5%	10%	15%	9%	19%	9%	7%	6%	12%
$2,500 to $4,999	4%	5%	8%	5%	14%	10%	5%	8%	2%
$5,000 or more	0%	0%	4%	2%	7%	2%	0%	2%	4%
Don't know	4%	2%	5%	4%	0%	1%	2%	1%	5%
Mean $	475	520	1,181	960	1,884	989	527	811	1,428
Median $	100	100	350	100	750	350	100	100	350

SPONSORED BY:
Follett Library Resources

Ebooks in the Materials Budget

This year's school library respondents said that *last year* ebooks comprised, on average, about 1% of their library's materials budget[9] (Figure 43). *This year*, that has doubled to a mean of 2.2% of the materials budget[10] (Figure 44). In addition, last year, 56% of libraries said that ebooks did not represent *any* part of their materials budget, which has declined to 28% this year. Some schools/libraries get special grants to invest in ebooks and related technologies, which may not be considered part of the materials budget, and could explain some portion of these "none" numbers. Some libraries also start their ebook collections using free resources like Project Gutenberg.

Figure 43. What % of your library's materials budget did ebooks represent <u>last year</u>?
% of school libraries

Figure 44. What % of your library's materials budget do ebooks <u>currently</u> represent?
% of school libraries

---
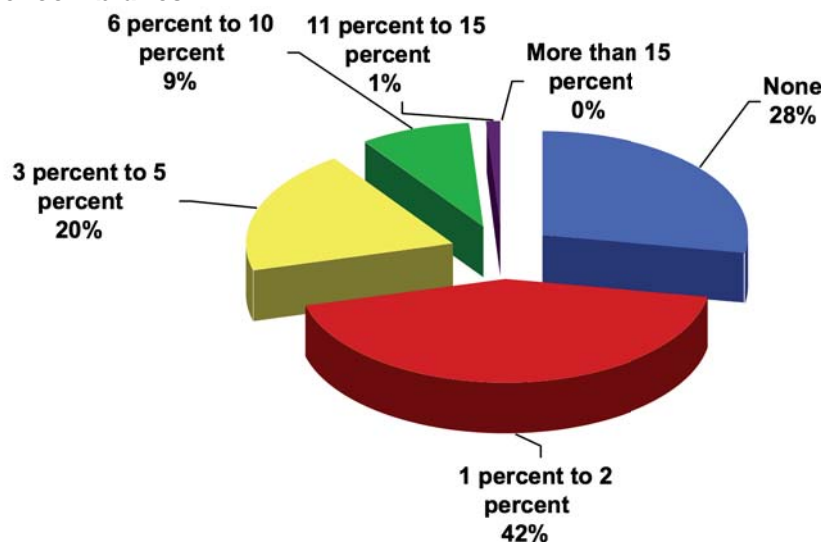
[9] Mean percentage of materials budget: 1.1%. Median percentage of materials budget: 0.0%.

[10] Mean percentage of materials budget: 2.2%. Median percentage of materials budget: 1.5%.

What will ebooks' share of the materials budget be in five years? Here's an interesting development, and it is likely that it has everything to do with the extent to which school budgets are in peril. This year, school librarians expect that in five years (2017) ebooks will represent, on average, 6.9% (median 7.1%) of their overall materials budget. However, in last year's survey, school libraries felt that ebooks would represent, on average, 8.0% of their materials budget in five years (i.e., 2016). So they are slightly less bullish this year, not necessarily about ebooks but rather more about their ability to have ebooks account for a large percentage of their already-stretched-thin materials budgets.

Figure 45. What percentage of your library's materials budget do you predict ebooks will represent <u>in 5 years</u>?
% of school libraries
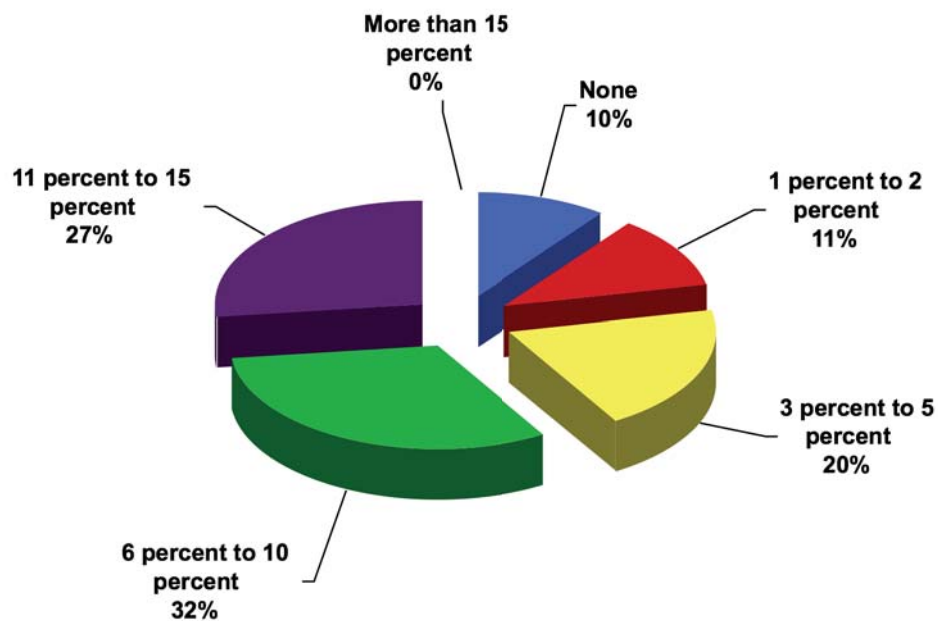
Table 31. What percentage of your library's materials budget did ebooks represent <u>last year,</u> <u>currently,</u> and what do you expect them to represent <u>in five years</u>?
% of school libraries by type of school and geographical region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
Last Year									
None	63%	51%	41%	57%	45%	63%	45%	68%	54%
1 percent to 2 percent	30%	37%	38%	34%	28%	24%	46%	26%	32%
3 percent to 5 percent	6%	2%	14%	6%	17%	12%	7%	3%	7%
6 percent to 10 percent	1%	8%	6%	3%	10%	0%	1%	3%	6%
11 percent to 15 percent	0%	2%	1%	1%	0%	1%	0%	0%	2%
More than 15 percent	0%	0%	0%	0%	0%	0%	0%	0%	0%
Mean %	0.8	1.5	1.7	1.1	1.9	1.0	1.1	0.8	1.4
Median %	0.0	0.0	1.2	0.0	1.2	0.0	1.1	0.0	0.0
This Year									
None	30%	24%	26%	29%	14%	23%	14%	38%	32%
1 percent to 2 percent	47%	37%	35%	42%	52%	46%	55%	45%	34%
3 percent to 5 percent	16%	27%	22%	19%	28%	22%	24%	8%	22%
6 percent to 10 percent	7%	8%	15%	9%	7%	8%	6%	9%	10%
11 percent to 15 percent	0%	3%	1%	1%	0%	1%	0%	0%	2%
More than 15 percent	0%	0%	0%	0%	0%	0%	0%	0%	0%
Mean %	1.9	2.7	2.8	2.2	2.4	2.4	2.3	1.7	2.4
Median %	1.4	1.7	1.7	1.5	1.7	1.6	1.7	1.3	1.5
In Five Years									
None	13%	7%	5%	11%	7%	6%	10%	9%	13%
1 percent to 2 percent	13%	14%	8%	12%	3%	7%	2%	21%	13%
3 percent to 5 percent	23%	12%	19%	20%	24%	14%	30%	21%	15%
6 percent to 10 percent	33%	22%	31%	31%	21%	31%	30%	28%	35%
11 percent to 15 percent	19%	46%	38%	26%	45%	42%	28%	21%	24%
More than 15 percent	0%	0%	0%	0%	0%	0%	0%	0%	0%
Mean %	6.1	8.2	8.0	6.7	8.3	8.4	7.1	6.0	6.6
Median %	6.2	9.2	8.4	6.9	9.0	9.0	7.1	4.9	7.0

General Conclusions

By our calculations, U.S. school libraries *in total* spent $89 million on ebooks in the 2011–2012 school year, up from the $50 million projected from the previous year's survey. The average library's spend was about $1,200. In general, spending on ebooks is up about 20% from last year, on average.

As a percentage of the overall materials budget, ebooks doubled from 1.1% to 2.2% on average. However, librarians are finding creative ways of getting monies for ebook expansion, from grants, to "book fair money," to other off-budget means. Some funding also comes through the state or school district.

SPONSORED BY:
Follett Library Resources

School libraries are also a bit more bearish about the extent to which ebooks will represent a larger percentage of the materials budget in five years, with expectations declining from last year. But a lot can happen in five years—hopefully positive things.

In Their Own Words...

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

- I'm very discouraged that the update wasn't completed by the district and so the ebooks have not been used at all this year. My students have been wanting them and it is out of my control. Hope for better results next year.

- It is a ridiculously complicated landscape, and publishers must be convinced to have a workable model that includes libraries. I look forward to a future where at least some of the bugs are worked out.

- It is important to our school to have "ownership" of the ebook. OverDrive is an ebook rental service. You lose the books when you no longer pay their fees. With Follett, I purchase the ebook and keep it. This model is important to me in future decision making. Viewing on as many devices as possible is also important.

- It's frustrating that Kindle and Nook are much more difficult to use in a school setting. They are consumer based models and have very little flexibility when working with schools.

- I've trusted Follett to do the ebook thing the best/right way. I'm wishing their model would allow for download of titles in .epub format for devices. Currently their app for handling doesn't display things in that format which is cumbersome to my users!

- Right now we are mainly buying e-books through Barnes & Noble for use on Nooks that student borrow. Any other e-books I have are a result of them being in that format on my subscription databases. I did buy a few books from Follett Shelf but have not been happy with the difficulty of access. I hesitate to purchase from Overdrive because I feel they are charging a large amount of money for me to have the "privilege" of buying books from them.

- Major concern is pricing issues arising with Overdrive. The huge upcharges make no sense. The reasoning given by individual publishers is very weak—libraries have always circulated their collection; anything offered in perpetuity still has a distinct shelf life.

- Marketing ebooks to Web surfers is harder than wrassling an oiled pig out of a slime pool, and I should know. I've tried both.

- My concern is once we are 100% ebook library what will happen to the role of grade school librarians

- My greatest frustration thus far has been the difficulty buying ebooks with a purchase order. Since my district doesn't allow anything else, it is a portion of my budget that I could not spend and will probably lose.

- My library serves only K-12 teachers and support staff. They have caught on to using ebooks very quickly. Since teachers and staff rarely visit our building and don't want to wait for books in the mail, the ebooks have proved to be a great solution for their professional development needs.

- My school just started ordering e-books this year. The Gale rep, Wendi, has been wonderful in training me and my staff and working wiht me to develop ways to promote usage.

- My students are very excited about ebooks. My readers are excited because they have access to more books and can read them online. My non-readers are excited because they forget about required reading until the last minute and now they have library access 24/7.

- Nearly all of our ebook holdings are reference materials, which would often benefit students with research. Unfortunately, many students do not know how to access or search for these books on the library OPAC. Creating displays to promote our ebook holdings is also a challenge.

- Our ebook vendors vary widely because of differences of intended use. Gale is entirely reference and patrons never need the entire book. Reading online works well. Page download options work well. EBSCO is designed for whole book reading. We encounter many more problems due to the clumsy authentication process. We need a true cloud solution.

- Our students don't have computer access outside of school hours except for library extended hours on Mondays. Ebooks are not a good fit for this population.

- Since we are confined to in browser reading, I think that makes the books less approachable.

- Since we do not intend to purchase digital readers, students need the optional devices to use. The faculty likes databases the best for the most up-to-date information and ELL options. We don't want to service proprietary devices and we don't want to get stuck with service fees for out of date books.

- So far, we've used what's available to us through our ESD membership in a limited fashion on classroom and library computers, but until ebook readers become more economical and the options for managing them become simplified, I don't see us venturing far into this realm on our limited budget and my limited time.

- Students and teachers were not as excited as I though they would be, but I think it has to do with our low poverty area where we live.

- Students are not allowed to bring their own electronic devices to school, which limits use.

- Students prefer the print. Anime not in ebooks.

- Students seem more interested in using nonfiction ebooks for research rather than reading ebooks for pleasure (fiction, etc.). I think this might change in the future.

- The 1:1 model is frustrating. Want to be able to "return" a book. Ebooks are currently all reference and students don't necessarily turn to them because it is yet another click; they want to Google everything

- The few students that are using the Kindle seem to REALLY enjoy reading a book using this device, and return and ask me to purchase other titles in order to use the Kindle

- The majority of our students and staff do not seem to be particularly interest in using ebooks. Some still prefer print and are not ready to make the switch.

- The students love the circulating collection of fiction and non-fiction books that appeal to teens, and I plan to add titles frequently. I love the reference collection for use in research.

- The teachers would like it easier to put on whiteboards when the class reads together instead of a few paragraphs before you need to click the next page.

- There are many advantages to having eBooks: 24/7 use, students who can't pay for late or lost books can use them without risk of loss or late fees, unlimited checkouts so teachers can use them for novel studies and students can take notes online as they read and turn in notes for a grade.

- There are many hoops a librarian has to jump to make e-books accessible. Ordering is easy, having the e-book added to the collection is easy, viewing on a school computer is very slow. Administrative gate keepers are the stumbling block to allowing access on multiple devices.

- There are too many negative issues surrounding ebooks to make them viable for student use at this time. Readers requiring purchase from a particular vendor; vendors that are not commercial friendly; lack of platform to allow download to personal devices; cost to acquire, replace and maintain devices and content; lack of eBooks in most desired titles. Would love to resolve issues so we can make this a real option for our students.

- They need to be readily and easily accessible to students through personal devices—no one reads on a computer screen anymore. They need to be multiple use licenses, not just one at a time.

- This is the first year I started seeing students coming to school with ereaders. After Christmas, I saw a great increase in the number of students who had their own readers. I felt it was my responsibility to meet their reading needs with a selection of ebooks.

- This year we've been leveraging our public library's OverDrive collection and showing students and staff how to download to personal devices. We only have Kindles so that's our expertise area. We'd love to get an OverDrive collection, but it seems cost prohibitive and I'm not sure they want to play with consortiums. It's confusing to sort out what to do next. I think OverDrive is the way to go, but the cost!

- Vendors/publishers need to realize that simultaneous user access is important and availability in all e-reader devices is equally important also.

- We acquired 4 Kindles in January. They have not been as popular as I expected. Students only use them when a print version of the book they want is not available, but the same book is available on a Kindle.

- We are a Pre-K to 2nd grade primary school so our needs/uses are a bit different. We have used (and love) Bookflix as an ebook source for a number of years, although it is pricey at $1,400 a year. I can use book fair "dollars" to "pay" for it. I purchased one ebook this year, set up FollettShelf and got some use. I will purchase more ebooks each year and train the staff to use them. I plan to only purchase multiple use, we-own-them ebooks. I also have 7 iPads on order for in-school use only so will also move in that direction.

- We are a rural school so it has been hard getting kids to use the Follett Shelf. Once they do, they really like it.

- We are considering subscribing to Overdrive to have more access to books which can be downloaded to devices rather than read on screen. Too many students/faculty now see our ebooks as just "on the web" and don't see the difference between ebook and Web page.

- We are depending on the public library to provide the majority of fiction titles for our students because they just signed with a library consortium using Overdrive. Our students cannot download books at school, so they will have to download from the public library site at their home.

- We are in a paradigm shift. Publishers haven't thought out the process. It makes it very hard to commit to anything until some issues with publishers is sorted out.

- We are interested in adopting e-textbooks, novels for language arts classes, etc., but first want to find out how that works in other schools—and we can't find schools who are doing this.

- We are just beginning the process of purchasing ebooks in preparation of promoting them when school begins next year for check out on personal ereading devices. Currently, we are using some nonfiction titles for research with classes, and students view them online. I suspect our ebook usage will greatly increase after the start of the school year next year.

- We are just getting our feet wet with e-books but do like the ease of use of Follett Shelf for ordering, maintaining, using, etc. I like that I do not have

to have a specific device and that we can have one shelf for all four middle schools.

- We are just starting acquisition of ebooks. The students have loved the circulating Kindles. However, the usage of other resources will require training of both faculty and students. I am planning to slowly increase the purchase of electronic resources including ebooks, downloadable audio books, and video.

- We are trying to get the books accepted, but regretfully we can't provide much with our budget. This year we had $10K of Title I money that we used for book accessible to computers and certain app devices. Usually our budget is less than $3K for everything, which may mean giving up next year's subscriptions.

- We have just begun exploring ebooks, now that we are moving into a new school with interactive whiteboards. Our present focus is Common Core curriculum support. Right now I'm waiting to hear the success of a grant that would place a dozen iPads into a classroom, for use with our ebooks, the Common Core standards, and some additional exciting ideas.

- We plan to increase the number of available ebooks in the media center. The ebook industry has been constantly evolving and we have been waiting until things settle before putting a large amount of money into ebooks.

- We purchased for our middle school through the local BOCES last year in a consortium purchase of bundled titles. The district cancelled the contract this year for funding reasons, but we retain access to last year's purchases. The BOCES just initiated service through OverDrive April 30. We will participate but do not plan to purchase any additional titles as a district.

- We would love to add more ebooks, particularly multi-user ebooks, but lack of technology in our schools is keeping this on hold. Many of our students are from low income families and may not have internet access at home. It is important to us to make sure that all students can access the resources we provide.

- We're still waiting for a viable solution that makes it easy for our users to access and use ebooks. We have a very limited number of ebooks and students don't want to read them on a computer but the vendor hasn't yet developed the platform for use with portable devices.

- When I buy an ebook, I want to have access forever. We still have books in our library from the 1800s that have been read hundreds of times.

- When we make a purchase decision, it is based on student needs and when choosing between a print or ebook, we always choose the ebook. This is what students want.

- With the number of controversies still surrounding the licensing and usage of ebooks on school equipment vs. student equipment and the cost-

prohibitive nature of independently purchasing ebooks for a school library collection, it is a difficult time to be a school librarian. Patrons expect "the best"—access to whatever technology they desire and ease of use in accessing that technology. However, school library budgets cannot accommodate this expectation so librarians look like they aren't "keeping up with the times" when in fact they are just trying to make the best of their budgets within the constraints it affords.

- With the technical problems and lack of standardization, I hesitate to purchase many ebooks. I see more of my students reading on their phones mostly but they have all sorts of phones. Trying to decide what is the most fair platform is difficult. If things were standardized, I would buy more if pricing were right.

5. LIBRARIES AND EBOOK VENDORS

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

Vendors Patronized and Preferred

In this question, we asked which vendors school libraries patronize, and report how that has changed over the past year. (For clarity's sake, 2012 survey data are presented in Figure 46; 2011 survey data are presented in Figure 47.)

FollettShelf remains the top vendor patronized by school libraries for ebooks (70%), essentially unchanged from 69% last year. A distant second is Gale Virtual Reference Library, at 21%, unchanged from last year. Tumblebooks tumbles up to 14% from 5% last year.

Figure 46. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)
% of school libraries
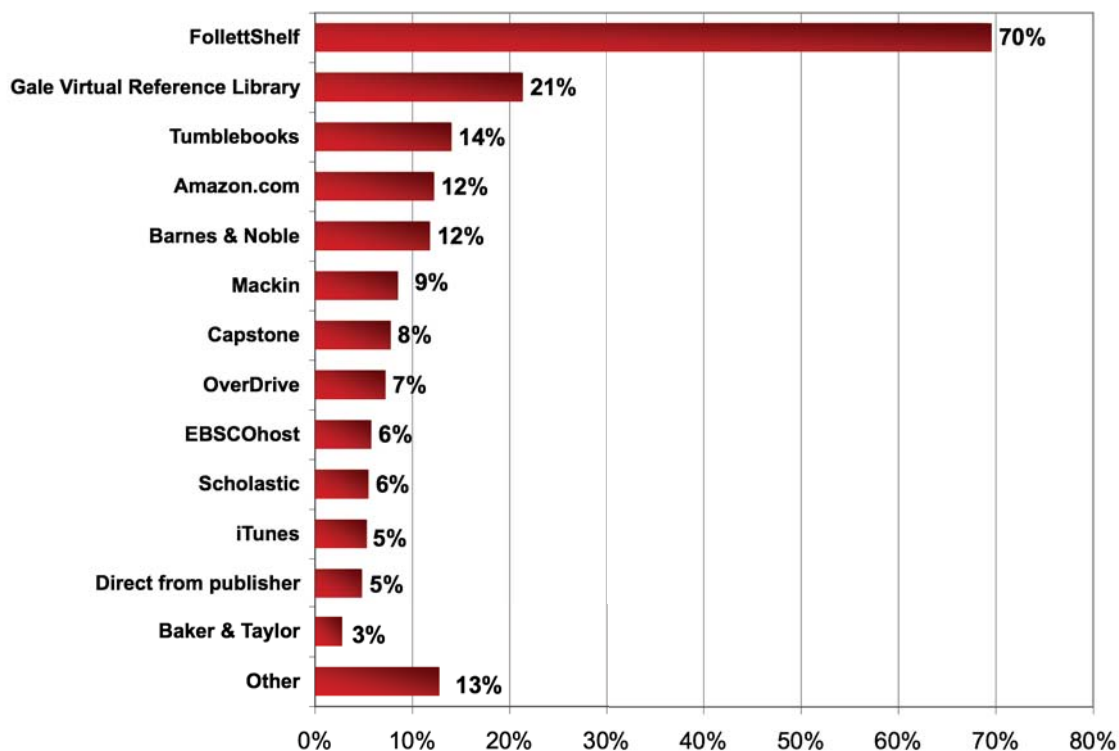
Figure 47. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)
% of school libraries (2011 survey)
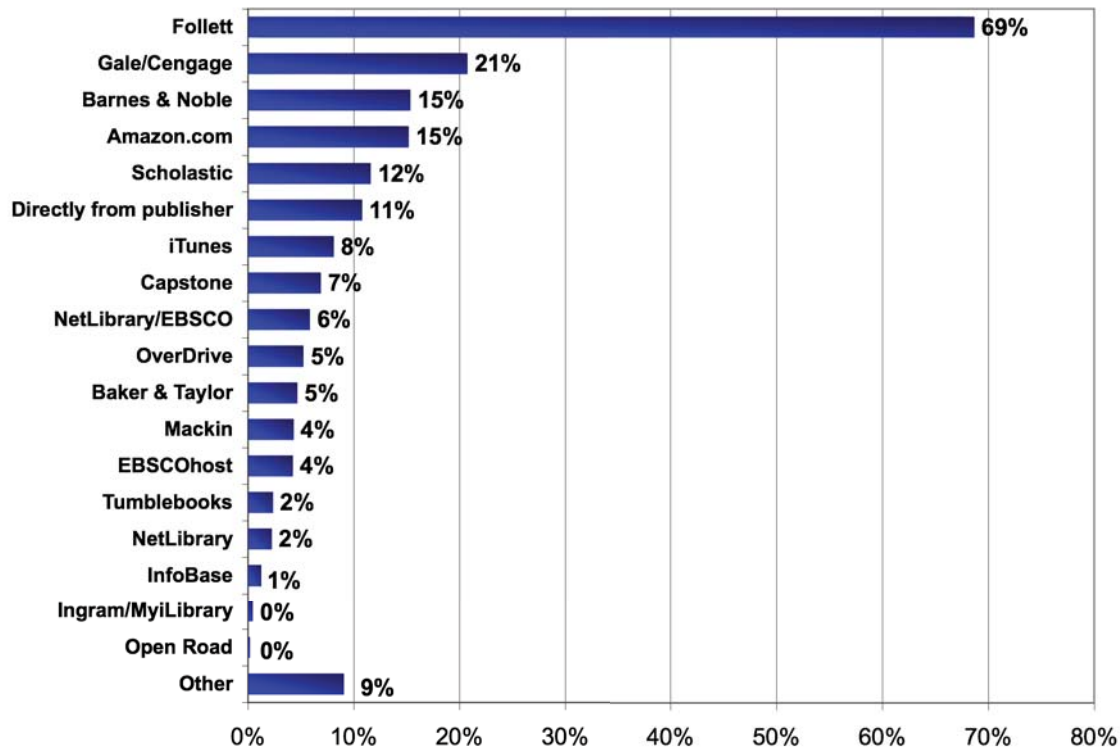
FollettShelf is the prevailing ebook vendor for middle and elementary schools. High school libraries tend to purchase primarily from both Follett and Gale Reference.

Table 32. From which vendor(s) does your library purchase ebooks? (multiple responses permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	Midwest	North-east	West	South
2012									
FollettShelf	76%	67%	59%	72%	42%	58%	73%	74%	71%
Gale Virtual Reference Library	2%	25%	60%	19%	57%	23%	30%	27%	12%
Tumblebooks	20%	10%	5%	15%	1%	22%	4%	12%	17%
Amazon.com	7%	17%	19%	10%	28%	13%	20%	12%	7%
Barnes & Noble	10%	17%	11%	12%	14%	21%	6%	11%	12%
Mackin	11%	3%	5%	9%	1%	7%	0%	15%	11%
Capstone	10%	5%	2%	8%	6%	7%	2%	2%	15%
OverDrive	3%	11%	12%	8%	6%	17%	5%	4%	5%
EBSCOhost	2%	7%	13%	5%	19%	7%	6%	7%	4%
Scholastic	8%	5%	0%	6%	6%	8%	2%	5%	7%
iTunes	4%	6%	5%	5%	10%	5%	4%	1%	8%
Direct from publisher	2%	6%	11%	4%	13%	3%	8%	4%	4%
Baker & Taylor	3%	3%	3%	3%	3%	3%	2%	3%	3%

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	Midwest	North-east	West	South
Freading	1%	0%	0%	1%	0%	0%	0%	2%	0%
CREDO Reference	0%	0%	2%	0%	3%	1%	1%	0%	0%
Other	10%	10%	19%	12%	26%	17%	8%	16%	12%
2011									
Follett	72%	69%	63%	70%	38%	81%	66%	64%	65%
Gale/Cengage	3%	22%	57%	20%	49%	16%	31%	16%	19%
Barnes & Noble	11%	15%	21%	15%	23%	21%	13%	22%	9%
Amazon.com	13%	16%	18%	14%	21%	8%	14%	38%	13%
Scholastic	18%	4%	3%	11%	10%	7%	8%	36%	9%
Directly from publisher	9%	5%	20%	10%	26%	6%	13%	10%	13%
iTunes	9%	7%	3%	8%	8%	4%	13%	12%	6%
Capstone	9%	9%	2%	7%	3%	1%	5%	18%	8%
NetLibrary/EBSCO	1%	8%	13%	4%	21%	4%	7%	6%	6%
OverDrive	5%	5%	4%	5%	5%	4%	3%	12%	5%
Baker & Taylor	5%	4%	4%	5%	3%	2%	3%	8%	4%
Mackin	5%	1%	4%	5%	0%	5%	0%	3%	8%
EBSCOhost	1%	3%	11%	3%	15%	4%	6%	2%	4%
Tumblebooks	4%	0%	0%	3%	0%	0%	6%	0%	3%
NetLibrary	0%	7%	4%	2%	5%	1%	2%	4%	3%
InfoBase	0%	1%	4%	1%	5%	1%	1%	0%	2%
Ingram/MyiLibrary	0%	0%	1%	0%	3%	0%	1%	0%	0%
Open Road	0%	1%	0%	0%	0%	1%	0%	0%	0%
Other	10%	5%	8%	9%	13%	8%	3%	17%	11%

Preferred Vendor

As for which vendor libraries *prefer* to work with, Follett again far and away tops the list at 45%, up from 38%, with Gale a very distant second at 6%. More than one-fourth, 27%, said "no preference," down from 38% last year. (For clarity, we only included 2011 survey data in Figure 48. Last year's data are provided in Figure 49.)

Figure 48. Which is your preferred ebook vendor? (only one response permitted)
% of school libraries

FollettShelf	45%
Gale Virtual Reference Library	6%
Amazon.com	4%
Barnes & Noble	4%
OverDrive	3%
Mackin	3%
Tumblebooks	2%
Capstone	1%
Scholastic	1%
Other	5%
No preference	27%
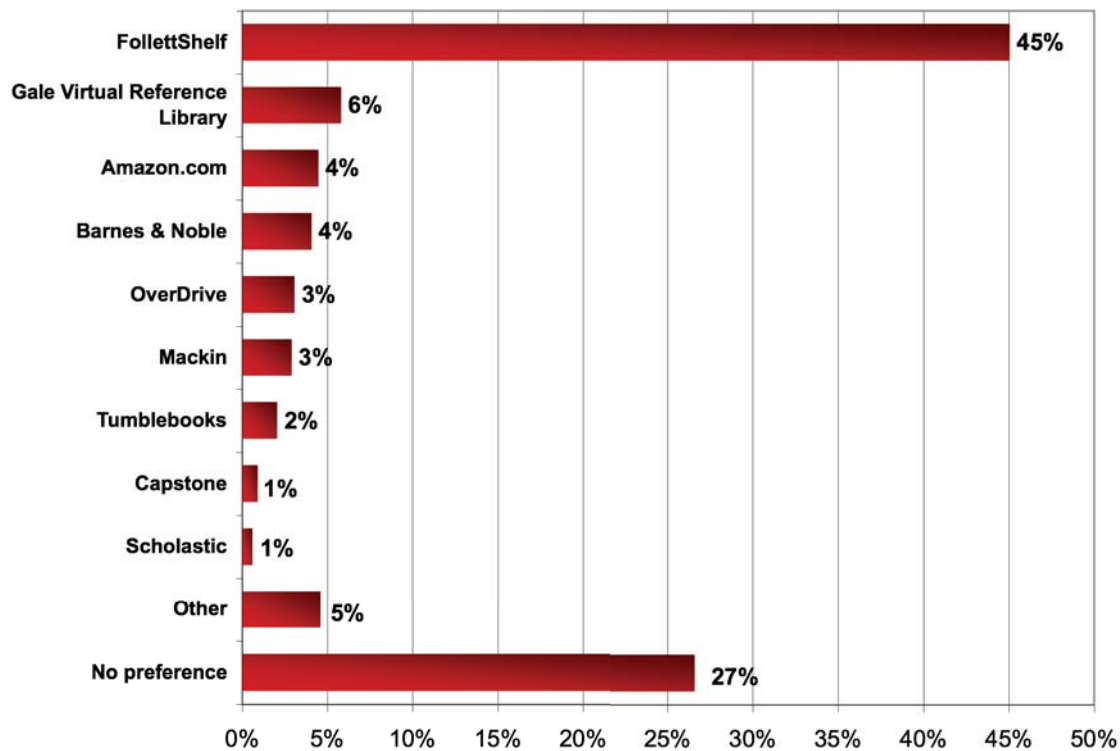
Figure 49. Which is your preferred ebook vendor? (only one response permitted)
% of school libraries (2011 survey)

Follett	38%
Barnes & Noble	7%
Gale/Cengage	6%
Amazon.com	5%
Mackin	3%
OverDrive	3%
Baker & Taylor	2%
Capstone	2%
NetLibrary/EBSCO	2%
Scholastic	1%
Directly from publisher	1%
iTunes	1%
NetLibrary	1%
EBSCOhost	1%
Ingram/MyiLibrary	0%
Open Road	0%
Other	1%
No preference	38%

SPONSORED BY:
Follett Library Resources
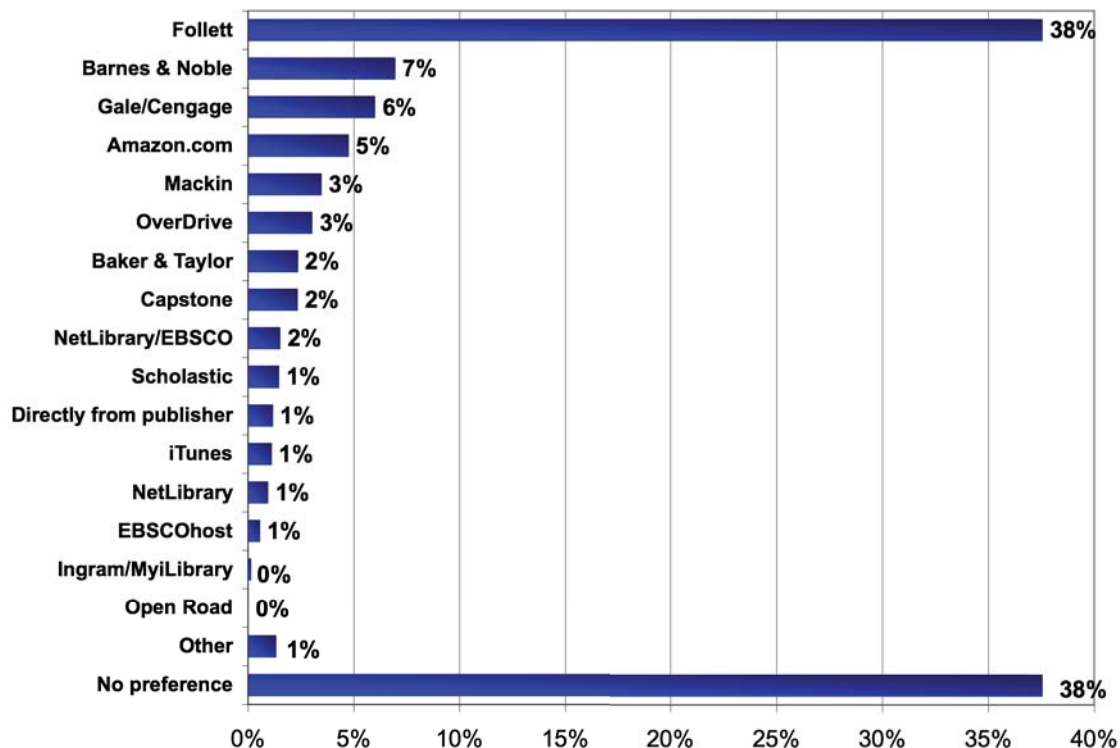
FollettShelf is the most preferred vendor for all school types. Follett gained favor among elementary schools over the past year, with their preference numbers soaring from 44% in 2011 to 57% in 2012.High schools are the most likely school level to have no vendor preference (34%).

Table 33. Which is your preferred ebook vendor? (only one response permitted)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
FollettShelf	57%	38%	27%	47%	22%	32%	50%	43%	49%
Gale Virtual Reference Library	0%	6%	19%	5%	16%	7%	9%	6%	3%
Amazon.com	3%	8%	6%	3%	12%	7%	8%	2%	3%
Barnes & Noble	4%	5%	2%	4%	4%	6%	2%	5%	4%
OverDrive	2%	5%	4%	3%	0%	9%	0%	2%	3%
Mackin	4%	1%	2%	3%	0%	1%	0%	5%	4%
Tumblebooks	3%	1%	0%	2%	0%	3%	2%	0%	3%
Capstone	2%	0%	0%	1%	0%	0%	0%	0%	2%
Scholastic	1%	1%	0%	1%	0%	0%	0%	2%	0%
Baker & Taylor	0%	1%	1%	0%	1%	1%	0%	1%	0%
Direct from publisher	0%	0%	1%	0%	0%	1%	0%	0%	0%
iTunes	0%	1%	0%	0%	0%	0%	1%	0%	0%
EBSCOhost (formerly NetLibrary)	0%	0%	1%	0%	0%	0%	0%	0%	0%
CREDO Reference	0%	0%	0%	0%	0%	0%	0%	0%	0%
Freading	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	4%	5%	7%	4%	10%	10%	3%	2%	4%
No preference	20%	32%	34%	26%	37%	27%	26%	31%	24%
2011									
Follett	44%	39%	27%	39%	23%	44%	38%	22%	39%
Barnes & Noble	5%	11%	7%	7%	10%	14%	2%	12%	4%
Gale/Cengage	1%	4%	18%	6%	20%	3%	9%	5%	6%
Amazon.com	3%	10%	6%	5%	3%	3%	5%	15%	3%
Mackin	5%	1%	2%	4%	0%	3%	0%	3%	6%
OverDrive	3%	4%	4%	3%	0%	6%	0%	5%	2%
Baker & Taylor	4%	1%	1%	3%	0%	1%	3%	0%	4%
Capstone	4%	1%	0%	3%	0%	1%	0%	5%	2%
NetLibrary/EBSCO	1%	0%	2%	1%	5%	1%	1%	7%	1%
Scholastic	3%	0%	0%	1%	3%	0%	0%	0%	4%
Directly from publisher	0%	1%	4%	1%	8%	1%	3%	0%	1%
iTunes	1%	1%	1%	1%	0%	1%	3%	0%	1%
NetLibrary	1%	0%	1%	1%	3%	0%	1%	5%	0%
EBSCOhost	0%	0%	1%	0%	3%	1%	0%	1%	1%
Ingram/MyiLibrary	0%	0%	1%	0%	3%	0%	0%	0%	0%
Open Road	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	1%	0%	1%	1%	8%	0%	0%	2%	3%
No preference	44%	39%	27%	39%	23%	44%	38%	22%	39%

Discounts

A major theme of this year's survey has been ebook cost and the challenges of growing ebook adoption and collections on paper-thin budgets. To what extent are school librarians satisfied with the discounts they receive from vendors to help meet those challenges?

A full 69% of respondents said they were "satisfied" with ebook discounts, while a further 7% were "very satisfied." Almost a quarter, though, were "dissatisfied," with another 2% feeling "very dissatisfied."

Figure 50. How satisfied are you with discounts off of list you receive from ebook vendors?
% of school libraries
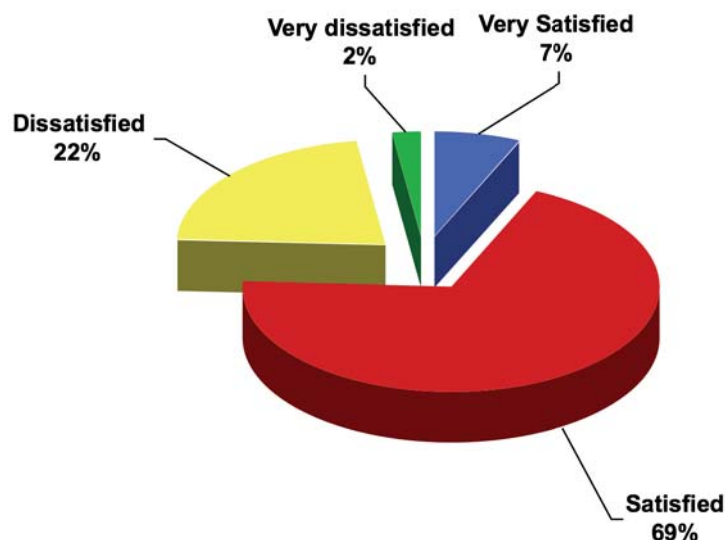
Middle and high school libraries are more likely to be dissatisfied with the ebook discounts they receive from vendors.

Table 34. How satisfied are you with discounts off of list you receive from ebook vendors?
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Very Satisfied	7%	6%	8%	7%	3%	5%	3%	8%	8%
Satisfied	79%	59%	61%	71%	57%	63%	71%	70%	71%
Dissatisfied	13%	31%	30%	20%	32%	29%	22%	20%	19%
Very dissatisfied	2%	4%	1%	2%	8%	3%	3%	2%	2%

Note that our survey asked an optional open-ended question about discounts and pricing. We present a selection of those verbatim comments at the end of this section

Important Attributes

This section is one of the most vital parts of our annual survey, identifying the attributes librarians look for when evaluating ebooks in general and ebook vendors in particular. A lot of these factors can be gleaned or surmised from responses to other questions in this report, but this section puts them out front and center. We asked respondents to rate attributes on a four-point scale—very important, important, somewhat important, not important. The data in this section aggregate the "very important" and "important" responses.

The most vitally important attribute for school libraries when considering an ebook vendor is, as always, "fair price/flexible purchasing plans"—this was either very important or important for 96% of respondents, down slightly from 99% last year. "Wide selection of titles and formats" is again at number two, unchanged at 95%, while "customer service" drops two points to 93%. "Ease of use for library users" drops a few points to 90%, and "multiple device options offered" drops from 85% to 79%.

Figure 51. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)
% of school libraries
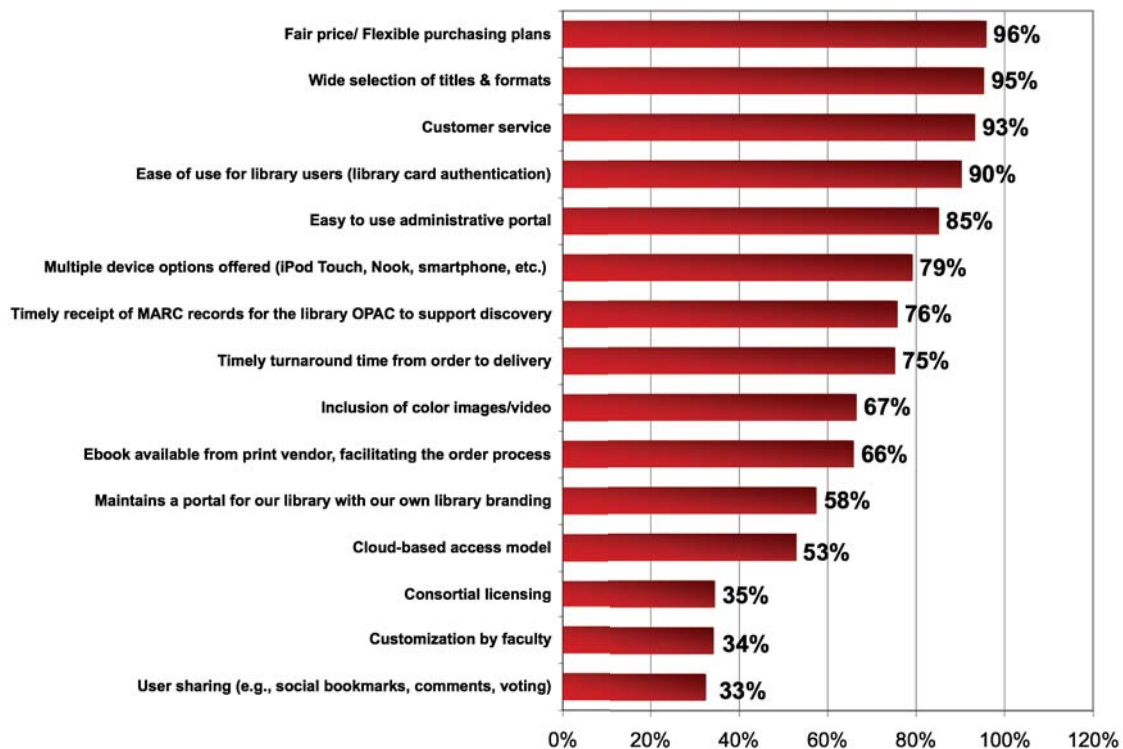
Figure 52. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)
% of school libraries (2011 survey)
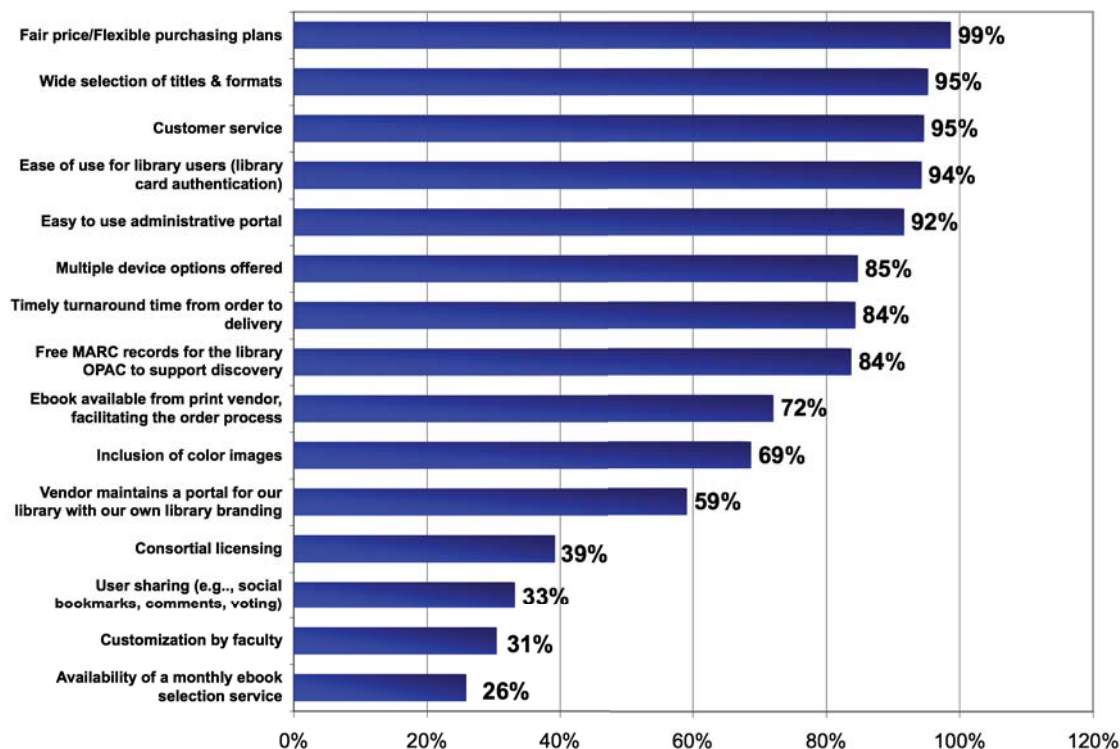
Few differences exist between the library types. "Inclusion of color images" is considerably more important to elementary school libraries, and a new item we added this year, "cloud-based access model," is a bit more important to high schools.

Table 35. Please rate the importance of the following attributes when considering an ebook vendor (Very Important/Important)
% of school libraries by type of school and geographic region

	Type of School			Public or Private		Geographic Region			
	Elem.	Middle	High	Public	Private	Midwest	North-east	West	South
2012									
Ease of use for library users (library card authentication)	90%	88%	93%	90%	96%	93%	92%	89%	89%
Multiple device options offered (iPod Touch, Nook, smartphone, etc.)	76%	84%	81%	79%	82%	89%	74%	83%	76%
Easy to use administrative portal	87%	83%	83%	86%	74%	82%	79%	87%	89%
Maintains a portal for our library with our own library branding	54%	64%	62%	57%	65%	69%	45%	55%	62%
Wide selection of titles & formats	95%	95%	96%	95%	95%	95%	96%	99%	93%

SPONSORED BY:
Follett Library Resources

	Type of School			Public or Private		Geographic Region			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
Fair price/ Flexible purchasing plans	97%	94%	96%	96%	100%	97%	93%	99%	96%
Customer service	95%	95%	90%	94%	94%	94%	90%	97%	93%
Timely receipt of MARC records for the library OPAC to support discovery	77%	79%	74%	77%	71%	66%	75%	77%	80%
Timely turnaround time from order to delivery	72%	83%	76%	75%	76%	78%	72%	80%	73%
Ebook available from print vendor, facilitating the order process	71%	69%	59%	68%	55%	55%	69%	69%	67%
User sharing (e.g., social bookmarks, comments, voting)	29%	38%	35%	32%	43%	30%	27%	39%	33%
Consortial licensing	33%	44%	34%	34%	37%	35%	25%	41%	37%
Inclusion of color images/video	78%	60%	47%	69%	51%	66%	54%	78%	69%
Cloud-based access model	47%	61%	62%	53%	58%	62%	48%	51%	53%
Customization by faculty	37%	32%	28%	34%	34%	31%	28%	30%	42%
2011									
Wide selection of titles & formats	94%	99%	98%	95%	95%	98%	96%	100%	92%
Ease of use for library users (library card authentication)	95%	96%	94%	94%	90%	98%	95%	97%	91%
Multiple device options offered	84%	90%	81%	85%	83%	88%	78%	95%	84%
Fair price/Flexible purchasing plans	99%	98%	99%	99%	98%	99%	100%	100%	97%
Customer service	96%	90%	95%	94%	98%	96%	91%	97%	95%
Timely turnaround time from order to delivery	87%	80%	80%	84%	83%	78%	77%	94%	89%
Easy to use administrative portal	94%	93%	89%	91%	93%	95%	90%	91%	90%
Vendor maintains a portal for our library with our own library branding	59%	58%	58%	59%	59%	59%	54%	70%	58%
Free MARC records for the library OPAC to support discovery	88%	81%	78%	84%	78%	74%	84%	89%	87%
Consortial licensing	39%	32%	38%	38%	58%	28%	47%	49%	37%
Availability of a monthly ebook selection service	28%	25%	22%	25%	29%	31%	21%	37%	21%
Ebook available from print vendor, facilitating the order process	78%	65%	66%	72%	68%	72%	71%	67%	74%

	Type of School			**Public or Private**		**Geographic Region**			
	Elem.	*Middle*	*High*	*Public*	*Private*	*Midwest*	*North-east*	*West*	*South*
User sharing (e.g., social bookmarks, comments, voting)	34%	30%	29%	32%	36%	36%	26%	46%	31%
Inclusion of color images	80%	51%	52%	69%	59%	64%	72%	59%	73%
Customization by faculty	32%	22%	30%	29%	41%	33%	25%	32%	31%

General Conclusions

FollettShelf and Gale are the most-patronized ebook vendors for this library channel (the later is particularly liked for reference materials, their specialty), and (so far) school libraries tend to be happy with them—although the individual verbatim comments at the end of this section can qualify the extent of those preferences. OverDrive is a major player in the public library market, but school libraries are not fans, disliking their subscription model.

"What discounts?" was a common verbatim comment to the write-in question about pricing, and top complaints were about the (it is felt) "unreasonable" pricing of ebooks—few librarians can justify ebook prices that are the same as (or often more than) the print edition, which is a fair point. Selection and availability of titles—especially in-demand titles—are also top issues for school librarians.

School libraries are in the early stages of ebook adoption, and are skittish about moving forward. Demand so far from students has been underwhelming, and publishers/vendors have not demonstrated any kind of value proposition—in fact, have often presented themselves as downright hostile to libraries. School librarians generally like the idea of ebooks, and are on board with the technology, but the budget is just not there. Without some cooperation from vendors and publishers, it is entirely possible that ebooks will languish in the school library channel for some time.

As we say every survey, and have said in the other editions of this report, publishers and vendors should pay particular attention to the attribute importance ratings, and read them through the lens of the verbatim comments provided throughout this report. While ebooks are the "new normal" in academic and public libraries, they're still the abnormal in school libraries. Can it become the "new normal"? Possible, but it will be a very fragile normal. Ebooks can be a robust growth area for school libraries, but anyone taking that growth for granted does so at their peril. Any technology can be abandoned quite readily, as the examples of 8-track tapes, cassette tapes, floppy disks, VHS tapes, vinyl records, and, very soon, CDs and DVDs all too readily point out. Also, book-reading itself can be an easily disrupted pastime, thanks to the intrusion of TV, Internet, video games, and social media.

In Their Own Words...

On the questionnaire, we encouraged respondents to write in their comments about ebook pricing and working with vendors. We present a selection of those verbatim comments here (lightly edited).

- As a district we went with Follett Shelf and love the product and working with the vendor.

- B&N does not give educator discount.

- Currently the school libraries are being excluded from the consortium pricing the public libraries enjoy through Overdrive. If there were a way to make the circle bigger I would be happy to add to the total number of titles available for all patrons.

- Depends on the vendor whether I am satisfied—some are way over-priced for what they offer and others are reasonable.

- Ebooks can be as expensive as a print book.

- For high ticket items (over $100), I can buy print though Barnes & Noble with an automatic 10% to 20% off, or I can be a "New" or "Very Good" copy through Barnes & Noble approved used book dealers for substantially less than the list price. There is never an option to purchase an ebook for substantially less than list.

- For reference ebooks, I tend to purchase during sales cycles when prices are discounted.

- Gale Cengage and Marshall Cavendish have provided great pricing this year on ebooks

- Higher prices for same material as print are unwarranted.

- I am not aware of discounts off list for ebooks.

- I am not happy about the current licensing and pricing of ebooks. We are unwilling to devote so much of our budget to materials we cannot own.

- I am paying full retail price for circulating ebooks, when I can usually get deep discounts for buying the same title in print.

- I am puzzled about why e-books are priced so close to the price of a print book. I think that publishers shoot themselves in the foot—library ebooks are more likely to stimulate a student's desire to purchase a book more than harming sales. Look at the success of the Wimpy Kid—and the first volume is available for free online!

- I don't receive any discount on ebooks purchased through Amazon or Barnes & Noble.

- I don't think we receive any discounts. Fiction prices have skyrocketed from some publishers through our ebook vendor so we just don't buy much.

- I haven't gotten any discounts from my vendor. I use my vendor for books in print and he gives us good discounts on this.

- I purchased using a simultaneous multi-user license. The cost is a little higher, but the availability to users makes up for the higher cost.

- I resist buying from publishers with wildly inflated ebook prices (Random House) and limited checkouts (HarperCollins).

- I took advantage of the new pricing Overdrive just came out with for small schools with fewer than 1,000 students. My highest priority was for my students to be able to download books to either Nook, Kindle, or iPad, whichever they had access to. I also wanted them to be able to download the book, not be required to read all of it online. I chose the more expensive option for my ebooks, but the only option that met my goals.

- I'm satisfied with some vendors and frustrated with others who won't consider district-wide pricing for USA books.

- Mostly satisfied but very concerned about individual publishers instituting pricing structures which are prohibitive: i.e., exorbitant upcharge for popular titles for libraries only.

- Not fair for vendors to make such a price differential in individual or unlimited use.

- Pricing is out of control. I am intimidated, and have chosen to not develop this part of the collection for the next year, hoping a real answer for how to do this will rise to the top. Right now I feel like I would be taken advantage of by all the options I have seen in one way or another.

- Pricing of some books is really crazy. Catalist downloadable audiobooks through Follett sometimes cost over $50. Can't afford many at that price!! Maybe I'm wrong here but I also count audiobooks as ebooks...

- Pricing seems to have been on the rise in the last year. Barnes & Noble and Amazon always say the price was set by the publisher, not by them. Those of us in public schools are waiting patiently for reasonable textbook prices.

- Pricing varies. Reference ebooks came as a bundle and were fairly priced. Ebooks are generally more and those that offer unlimited simultaneous use are even more.

- Print is more expensive to produce—electronic should be significantly cheaper but the pricing isn't that way yet...not understanding why...

- Public school budgets do not allow school libraries to keep up with tech trends. Ebooks need to be made more accessible for libraries to purchase and for patrons to use.

- Some titles I investigate are reasonable. Some are prohibitive. If the price is high, I will not be buying it because even when we have a budget, it is not huge. We are very limited. I would buy at a reasonable price the hot

titles my students ask for if we had concurrent and unlimited use, even if I had to pay a little more. I would have print copies also for those who don't like to read on devices or computer screens. I personally prefer to read on my devices, but hate the computer screen. I have prejudices against purchasing ebooks but must consider pricing.

- Some vendors have very good offers and others (Overdrive) are inflexible.

- The price of ebooks is not that much less than print materials. I'm still trying to justify that in my own rationalizing.

- The two major problems are some publishers will not sell to libraries and other publishers have increased their prices 300%.

- Tight budgets are a big concern right now, we need to search out best/lowest prices.

- Unlimited checkouts at Follett ebooks are VERY reasonably priced. Gale ebooks have online unlimited access, which saves money over time.

- Varies by vendor. Many are overpriced, and yearly fees are very unpopular with me. One vendor, Marshall Cavendish, gave me a great deal.

- We were able to purchase a fantastic set of Marshall Cavendish eBooks with perpetual licenses and unlimited access for a very reasonable cost. However, most models are still quite expensive for district level purchases for multiple schools.

- We've invested in Overdrive—so, the discount pricing is not often. They won't let us integrate other ebooks into their platform, so I'm unwilling to purchase any other ebooks because it will just confuse are patrons (students and staff) if there are ebooks in multiple places with different methods needed to access them.

- What discounts?

- Would like to have better consortium pricing from other vendors. Have been spoiled by Gale.

APPENDIX: SCHOOL LIBRARIES QUESTIONNAIRE

The Survey Methodology

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

The ebook survey was developed by *Library Journal* and *School Library Journal* to measure current and projected ebook availability in libraries, user preferences in terms of access and subjects, and library purchasing terms and influences.

LJ's school library ebook survey was fielded from May 4, 2012 to June 21, 2012. A survey invite was sent directly to all *Library Journal* and *School Library Journal* newsletter subscribers and to Junior Library Guild's school elist. A survey link was advertised in *School Library Journal* newsletters in May and June. A drawing for a $499 Apple iPad was offered as incentive to reply.

The survey closed with 1,427 school libraries from across the country responding. The survey was developed, programmed, hosted and tabulated in-house. The data presented in this report was cleaned to eliminate duplicates from the same library and to include U.S. school libraries only. Numbers shown in total were weighted based on NCES (National Center for Education Statistics) data for number of U.S. school libraries (Elementary, Middle School, High School) nationwide.

Previous data used for comparison is based on 905 U.S. school libraries in 2011 and 697 U.S. school libraries in 2010.

School Library Ebook Questionnaire

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

2. What type of school do you work in? Check all that apply.
☐ Elementary school
☐ Middle/Junior High school
☐ High school
☐ Other school (K-8, K-12, etc.), specify grades:_____
☐ Administration (e.g., district level)

3. Is your school public or private?
☐ Public
☐ Private
☐ Other

4. Which of the following comes closest to your job title?
☐ Library Media Specialist
☐ Library Media Generalist
☐ Teacher Librarian
☐ Librarian
☐ District library coordinator/supervisor
☐ Other (please specify)_____

5. Approximately how many students attend the school you work in? If you work in more than one school or at the district level, please answer for the largest school you serve.
☐ Under 200
☐ 200 - 499
☐ 500 – 749
☐ 750 - 999
☐ 1,000 – 1,499
☐ 1,500 – 1,999
☐ 2,000 or more, specify #_____

6. What is your library media center's total materials budget for this school year (2011-2012)? If you work in more than one school or at the district level, please answer for the largest school you serve.

☐ $0 – no materials budget   ☐ $15,000 - $19,999
☐ Less than $2,500, specify_____   ☐ $20,000 - $24,999
☐ $2,500 - $4,999   ☐ $25,000 - $29,999
☐ $5,000 - $9,999   ☐ $30,000 or more, specify:_____
☐ $10,000 - $14,999

7. How long has your school offered ebooks?
☐ We do not offer ebooks [If your school has no ebooks, skip to Q 42]
☐ Less than 6 months
☐ 6 to 12 months
☐ 1 to 2 years
☐ 3 to 4 years
☐ Longer than 4 years

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

9. How many ebooks does your library have access to in total, including ebooks licensed through the district, state or a consortium.
☐ 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 # _____

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

11. Does your library buy ebooks independently?   ☐ Yes   ☐ No

12. If yes, approximately how many ebooks has your library bought or licensed independently?
☐ Under 50, specify #_____
☐ 50 to 99
☐ 100 to 249
☐ 250 to 499
☐ 500 to 999
☐ 1,000 to 2,499
☐ 2,500 or more, specify #_____

13. What percent of your school's ebook usage would you estimate is downloaded versus viewed online?
% ebooks downloaded   _____%
% ebooks viewed online   _____%

SPONSORED BY:
Follett Library Resources

14. Is your library able to track circulation/usage statistics for ebooks available through the district, state or consortium?
☐ Yes
☐ Not always
☐ No
☐ N/A

15. Approximately, what was your total ebook usage/circulation for the last school year?
2010-2011 school year usage/circulation _____

16. 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? _____%

17. Which categories of ebooks does your school library media center currently offer? Check all that apply.
☐ Children's picture books   ☐ Young adult fiction
☐ Children's fiction   ☐ Young adult nonfiction
☐ Children's nonfiction   ☐ Classic literature
☐ Reference ebooks   ☐ Textbooks
☐ Middle grade fiction   ☐ Other (specify)_____
☐ Middle grade nonfiction

18. Which categories of ebooks are most in-demand? Please select up to three top categories.
☐ Children's picture books   ☐ Young adult fiction
☐ Children's fiction   ☐ Young adult nonfiction
☐ Children's nonfiction   ☐ Classic literature
☐ Reference ebooks   ☐ Textbooks
☐ Middle grade fiction   ☐ Other (specify)_____
☐ Middle grade nonfiction

19. In which format do users generally prefer ebooks? Check all that apply.
☐ PDF
☐ Full-text HTML
☐ ePub
☐ Optimized for dedicated ebook device (e.g., Kindle, Nook)
☐ Optimized for other mobile device (e.g., smartphone, iTouch, etc.)
☐ Other (specify)_____
☐ Don't know

20. Are users able to download ebooks to devices inside your school?
☐ Yes, we have a dedicated download station
☐ Yes, on our internet computers
☐ No, downloads must be made offsite

21. On what devices do your school's users read ebooks? Check all that apply.
☐ Laptop, PC or Netbook
☐ Interactive white boards
☐ Dedicated ebook reader (e.g., Nook, Sony Reader, Kindle)
☐ Tablet (e.g., iPad)
☐ Smartphone or other mobile device
☐ iPod Touch or similar
☐ Other (specify)_____
☐ Don't know

22. If dedicated e-readers or tablets are used, what percent of students who read on these devices would you estimate read on a student or family owned e-reader or tablet?
_____%

23. Does your library have ereading devices available for students to borrow?
☐ Yes, but for in-library or classroom use only
☐ Yes, for take home use
☐ Not currently, but considering
☐ No and no plans to acquire

24. If yes, which ereading device(s) does your library currently have available? Check all that apply.
☐ Kindle   ☐ NOOK Tablet
☐ Kindle Fire Tablet   ☐ Apple iPad
☐ Kobo Reader   ☐ Other Tablet
☐ Sony Reader   ☐ iPod Touch or similar
☐ NOOK   ☐ Other (specify) _____
☐ NOOK Color

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

26. [If Tablet] Do you load educational apps or enhanced ebooks on your school's tablets? Check all that apply.
☐ Interactive educational tools (e.g., TouchPress)
☐ Book apps/Enhanced ebooks
☐ Productivity tools for teachers, administration, etc.
☐ Games
☐ Other, please specify _____
☐ No we do not load devices with apps

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

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

_____

29. What hinders students/faculty from reading your media center's ebook content?
☐ Too few titles available
☐ Difficult to find/discover
☐ Difficult to read onscreen/online
☐ Difficult to annotate
☐ Ebooks not available for preferred devices
☐ Limited access to e-reading devices (at home and/or school)
☐ Limited access to internet for off-site access
☐ Users prefer print books
☐ In demand titles not in ebook format for libraries
☐ Long wait times for ebooks
☐ Lack of training
☐ Technology issues (e.g., slow/complex to download, district restrictions, etc.)
☐ Students unaware of ebook availability
☐ Ebook titles not available concurrent with print release
☐ Parent/guardian must sign permission/liability form
☐ Other (specify)_____
☐ None of the above

30. How often do your users report technical problems when downloading an ebook?
☐ Often
☐ Sometimes
☐ Rarely
☐ Never

31. Do you have a role in making purchasing recommendations/decisions for ebooks in your school?
☐ Yes
☐ No (Go to Q41)

32. Approximately what percentage of your library's materials budget did ebooks represent last year, in the current school year and what percent do you predict ebooks will represent in 5 years?

	0%	1% - 2%	3% - 5%	6% - 10%	11% - 15%	More than 15%
Last year	☐	☐	☐	☐	☐	☐
Currently	☐	☐	☐	☐	☐	☐
In 5 years	☐	☐	☐	☐	☐	☐

33. How much would you estimate your library spent on ebooks for the current school year (2011/2012)?
☐ $0 – all ebooks provided by state/district/consortium
☐ Less than $200
☐ $200 - $499
☐ $500 - $999
☐ $1,000 - $2,499
☐ $2,500 - $4,999
☐ $5,000 or more (specify) $_____
☐ Don't know

34. What were the driving forces behind your library's initial adoption of ebooks? Check all that apply.
☐ Media attention
☐ Educational trends/best practices
☐ School board mandate
☐ School administrators
☐ Faculty request
☐ Librarian self-motivated
☐ Student request
☐ To keep up-to-date with technology
☐ Other, specify_____

35. What factors currently influence your decision to purchase or license a particular ebook for your media center? (Check all that apply)
☐ Projected usage/high demand titles
☐ Availability as a single title purchase
☐ Book reviews
☐ Limited shelf space
☐ Licensing terms/Lending caps (e.g., Harper Collins 26 circ model)
☐ Required use of titles in the curriculum
☐ Faculty request
☐ Student request
☐ Parent request
☐ Inclusion in bundles with attractive pricing
☐ Ease of purchase/Integrated purchasing with print book
☐ Special grant
☐ Multiple users at one time
☐ Interactive whiteboard usage
☐ Cost
☐ Common Core standards initiative
☐ Inability to use purchase order
☐ Reduces material loss
☐ Other (Please specify)_____

36. 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   ☐ Concurrent use/access
☐ Purchase with perpetual access   ☐ Bundled with other content
through self-hosting   ☐ Patron-driven acquisition
☐ Subscription   ☐ Upfront purchase with maintenance fee
☐ Pay-per-use   ☐ Upfront purchase with update fee
☐ License with set # of circs model   ☐ Other (specify)_____

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

	Very Important	Important	Somewhat Important	Not Important	No Opinion
Ease of use for library users (library card authentication)	☐	☐	☐	☐	☐
Multiple device options offered (iPod Touch, Nook, smartphone, etc.)	☐	☐	☐	☐	☐
Easy to use administrative portal	☐	☐	☐	☐	☐
Maintains a portal for our library with our own library branding	☐	☐	☐	☐	☐
Wide selection of titles & formats	☐	☐	☐	☐	☐
Fair price/ Flexible purchasing plans	☐	☐	☐	☐	☐
Customer service	☐	☐	☐	☐	☐
Timely receipt of MARC records for the library OPAC to support discovery	☐	☐	☐	☐	☐
Timely turnaround time from order to delivery	☐	☐	☐	☐	☐
Ebook available from print vendor, facilitating the order process	☐	☐	☐	☐	☐
User sharing (e.g., social bookmarks, comments, voting)	☐	☐	☐	☐	☐
Consortial licensing	☐	☐	☐	☐	☐
Inclusion of color images/video	☐	☐	☐	☐	☐
Cloud-based access model	☐	☐	☐	☐	☐
Customization by faculty	☐	☐	☐	☐	☐

38. How satisfied are you with discounts off of list you receive from ebook vendors?
☐ Very satisfied
☐ Satisfied
☐ Dissatisfied
☐ Very dissatisfied

39. From which vendor(s) do you acquire ebooks for your media center? (Check all that apply)
40. Which is your preferred ebook vendor?

	Q39. ebook vendor(s) you purchase from	Q40. One Preferred ebook vendor
Amazon.com	☐	☐
Baker & Taylor	☐	☐
Barnes & Noble	☐	☐
Capstone	☐	☐
CREDO Reference	☐	☐
EBSCOhost (formerly NetLibrary)	☐	☐
FollettShelf	☐	☐
Freading	☐	☐
Gale Virtual Reference Library	☐	☐
iTunes	☐	☐
Mackin	☐	☐
OverDrive	☐	☐
Scholastic	☐	☐
Tumblebooks	☐	☐
Direct from publisher	☐	☐
Other (Specify)_____	☐	☐
No Preference		☐

41. If you have any comments about ebooks in your media center/school, please write them below.

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

42. Why doesn't your library offer ebooks? Check all that apply.
☐ No money for ebooks
☐ Lack of 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/administrative resistance
☐ Other (specify)_____
☐ We are in the process of adding ebooks

43. 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)_____

LIBRARY RESEARCH SYNDICATE

Brought to you by *Library Journal* and *School Library Journal*.

PATRON PROFILES: Understanding the behavior and preferences of the U.S. public library *user.*

- Quarterly publication that gives you data on what library users want from their library
- An essential tool for public library directors and decision-makers
- *www.PatronProfiles.com*

DOWNLOAD LIBRARY RESEARCH REPORTS at *www.TheDigitalShift.com*

- **Ebook Usage in U.S. Libraries. Three versions: Public, Academic and School Library data**
- **Public Library Budget Survey**

CUSTOM RESEARCH: Combine market research experts with a powerful library database and well-known library publication brands for strong results.

We offer affordable custom research solutions to answer your business questions and aid decision making. Using our online database tool, we will speak to librarians about your brand, new products, and the buying power of individual groups.

FOR MORE INFORMATION OR TO DISCUSS A QUOTE, CONTACT YOUR LJ/SLJ ACCOUNT MANAGER:

CATHY HOEY
646-380-0725; choey@mediasourceinc.com

LESLIE JONES
630-771-1360; ljones@mediasourceinc.com
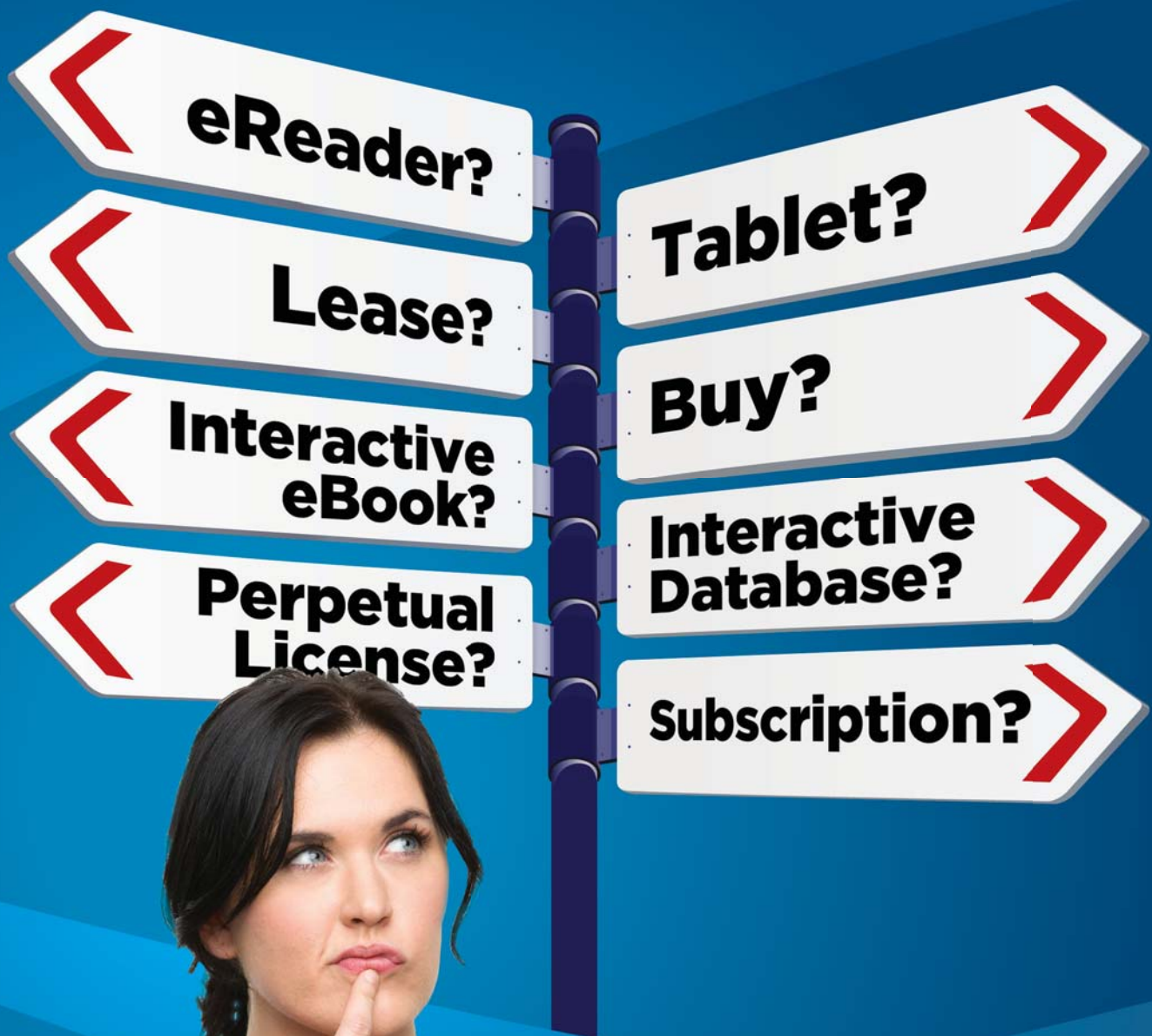
JANICE WELCH
770-607-3421; jwelch@mediasourceinc.com

ROY FUTTERMAN, Advertising Director
646-380-0718; rfutterman@mediasourceinc.com

HOWARD KATZ
646-380-0730; hkatz@mediasourceinc.com