

The image shows a tablet computer lying on a surface surrounded by several physical books. The books have various colored covers: purple, brown, blue, green, and dark blue. The tablet screen is white and displays the title of the survey in a bold, red, sans-serif font, centered on the screen. The text is arranged in six lines, following the curve of the tablet's display.

**Survey of
Ebook
Penetration
and Use in U.S.
School (K-12)
Libraries**

November 2010

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EXECUTIVE SUMMARY

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

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

Just as interest in and a preference for ebooks grows in the culture at large, ebooks are gaining a foothold in school libraries. School librarians consider all materials, formats and how they fit into their collection, patron/teacher/curricular needs, as well as their budget when making purchasing decisions — and ebooks serve a variety of needs for library patrons. Ebooks also solve some problems for libraries. They don't wear out or get damaged,² they don't need to be replaced, and they aren't easily lost. They also don't require physical storage, and many libraries are strapped for space.

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

School libraries have unique concerns that distinguish them from other book buyers and ebook users. Chief among them is that budgets are tight. At the same time, libraries must serve the needs of a diverse population and making ebook holdings accessible to all users who want them can be a challenge.

As our survey found, middle schools appear to be most receptive to ebooks. Middle school students are most likely to have dedicated ebook readers, and they are most likely to make ebook requests. Middle school libraries also report that they expect a higher increase in ebook circulation.

This following data is based on 697 American school libraries; 71% elementary, 14% middle/junior high schools and 15% high schools.

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

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

Ebook Collections

At present, only one-third of school libraries (33%) say they currently offer ebooks to users. The likelihood of carrying ebooks increases by grade level. Indeed, two-thirds of high school libraries say they *do* carry ebooks, while only one-fourth of elementary schools say they do. This might be a function of budgets as high school libraries generally have higher materials budgets.

Of those school libraries that *do* carry ebooks, on average they own or subscribe to about 50 ebooks (mean 49.4; median 32.0). The size of ebook collections in school libraries rises proportionately with grade level, from elementary to high school.

“Generation Z are digital learners and I hope to be able to better meet their needs as well as offer an exciting alternative to paper books.”

As for that 67% that currently don’t offer ebooks, 25% plan to offer ebooks in the next 12 months, while a further 42% plan to offer ebooks in the next couple of years. One-third (34%) of school libraries say they currently have no plans to offer e-books. Elementary schools are the least likely to currently be planning to offer ebooks.

We plan to offer ebooks...	
In the next 12 months	25%
1 to 2 years from now	28%
Longer than 2 years from now	14%
No plans to offer ebooks	34%

The 34% that say they have no plans to offer ebooks may end up changing their minds as user demand grows. Still, a segment of the overall library market has not been seeing demand for ebooks. A preference for ebooks is not universal (remember that ebooks only account for 1.3% of all book sales). It’s even conceivable—given many of the verbatim comments that we received from survey respondents—that libraries and users may become *less* enthusiastic about the idea of ebooks, especially given the challenges that many have with regard to incompatible formats, user-unfriendliness, high cost, and lack of technical and customer support.

When we asked about the primary drivers of ebook purchases, more than half (55%) of school libraries cited “projected usage” based on current usage statistics, with “faculty request” not far behind (51%).

Looking ahead, the majority of survey respondents (65%) expects ebook circulation to *increase* next year compared to this year, although 34% expects it to remain the same. Only 1% expects a decrease in ebook circulation. Overall, circulation of ebooks is expected to increase approximately 26% next year.

Ebook Readers and Formats

The library computer tends to be the hardware device on which most library users read ebooks, followed by a personal computer or laptop. Nine percent of respondents “don’t know” on what hardware their users are reading ebooks. Smartphones, which this survey doesn’t directly address, will increasingly be used in schools, now that the most recent Erate application is encouraging their use.

Device(s) on which library users most often read ebooks...	
Library computer	72%
Personal laptop/Computer/Netbook	52%
Other portable device	13%
Dedicated ebook reader	9%
Don't know	9%
Other	6%

In terms of ebook formats, the top format was HTML (36%), suggesting that these libraries are offering Web-based ebooks. The near-ubiquitous PDF format garnered 23%; at one time, it was hoped that PDF would be the de facto standard format for ebooks—and maybe to some extent it is. Meanwhile, 39% of respondents say that they “don’t know, ebooks haven’t caught on.”

Preferred ebook format(s)...	
Don't know yet, ebooks haven't caught on	39%
Full text HTML	36%
PDF	23%
Optimized for dedicated ebook device	14%
ePub	7%
Optimized for other mobile device	6%
Other	11%

A single standard format for ebooks is highly desired by users, libraries, and even publishers. Each manufacturer offers its own proprietary format that is optimized for its particular reader, and which integrates its unique DRM scheme. Until the market shakes out further and a clear “winner” emerges, publishers and libraries will be required to offer titles in all formats, or they risk alienating users who can’t find the titles they want on the device they prefer. Similarly, the VHS vs. Beta dilemma of the 1980s forced video rental shops to stock both formats, until Beta finally lost out (which in turn gave way to DVDs).

“Currently we are only utilizing e-books that are available via a web browser not ones that require specific e-book readers.”

Ereader Circulation

We also asked if libraries circulate actual ereading devices. Overwhelmingly, they do not; 58% of all school libraries do not circulate preloaded e-readers, while a scant 6% do. But then 36% are considering it. Naturally, cost is a big barrier; there isn't just the one-time-only purchase cost of a device. There are upgrades, as well as the need to support and replace broken, lost or stolen ebook readers. Librarians are also likely awaiting device standardization before entering this arena.

Libraries that do circulate ereaders are most likely to offer the Amazon Kindle.

Usage License and Circulation Interval

The vendor typically determines the usage license and different vendors have different models, which is why 40% of school libraries say their license allows only "single ebook use at a time," 35% say "unlimited access/simultaneous use" and 23% say "both."

Ebook usage license model...	
Single e-book use at a time	40%
Unlimited access/ simultaneous use	35%
Both	23%
Other	2%

One to two weeks is, on average, the circulation interval for ebooks. Fourteen percent of respondents allow the user to specify the circulation interval, likely because the library (or, actually, the vendor) limits the number of ebooks that can be accessed simultaneously.

Ebook Categories

Within ebook collections currently offered by school libraries, children's fiction makes up 51%, and children's nonfiction 39%. Forty-two percent of school libraries selected reference (non-circulating). Thirteen percent of school libraries do not currently circulate their ebooks, and only offer noncirculating reference titles. Naturally, elementary schools are more likely to circulate fiction and nonfiction, while high schools emphasize reference titles. Middle schools fall in-between and offer more of a mixture.

Ebook categories offered by library media centers...	
Children's fiction	51%
Reference (non-circulating)	42%
Children's nonfiction	39%
Children's picture books	34%
Young adult nonfiction	24%
Young adult fiction	23%
General adult nonfiction	10%
General adult fiction	8%
Bestsellers	3%
Other	6%
Noncirculating reference ebooks ONLY	13%

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