

Overview of the current e-book landscape

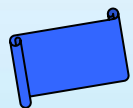
ALIA e-book Think Tank – Adelaide, 9 July 2013

*Margaret Allen
CEO and State Librarian
State Library of Western Australia*

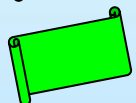
The research methodology

Online Survey 2011 and 2012 by TNS Research

- Residents (users and non-users) who had read at least one book in 12 months
- Sample 2011 n=309; 2012 n=797
Total=n1106
- Survey data weighted by age and gender to reflect Brisbane population



• Drivers of change



• Opportunities for libraries

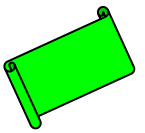


• Issues for libraries

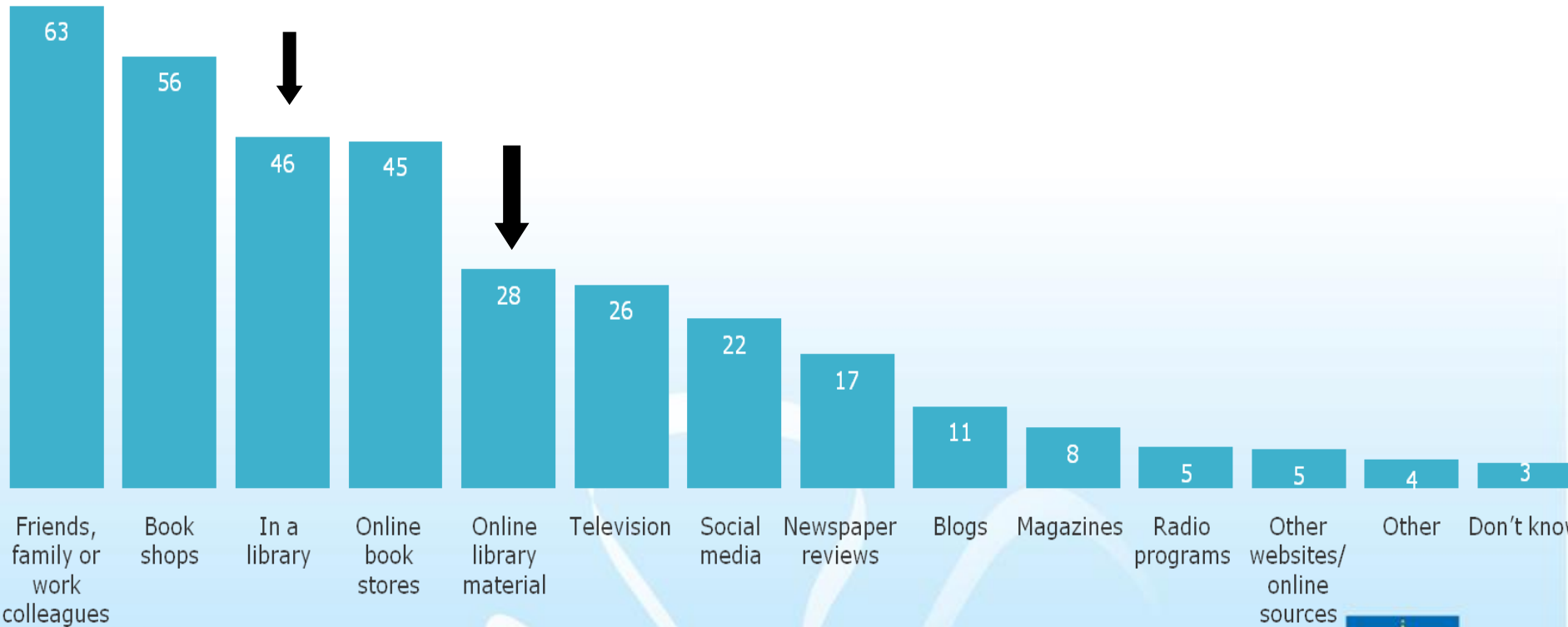


Dedicated to a better Brisbane

Libraries play an important role in reading discovery



- The most common sources of information are through family/friends/work colleagues and book shops.
- The library also features as a source for almost one in two readers (46%).
- 28% use online library material.



A1 Please think about all the different ways you can find out information about books; such as whether or not to purchase or borrow books, the release dates of new books or recommendations of what to read next. Now thinking about the various different types of information that can be used, what do you use to find out more about what books to read?

Base: Total Sample 2012 n=797

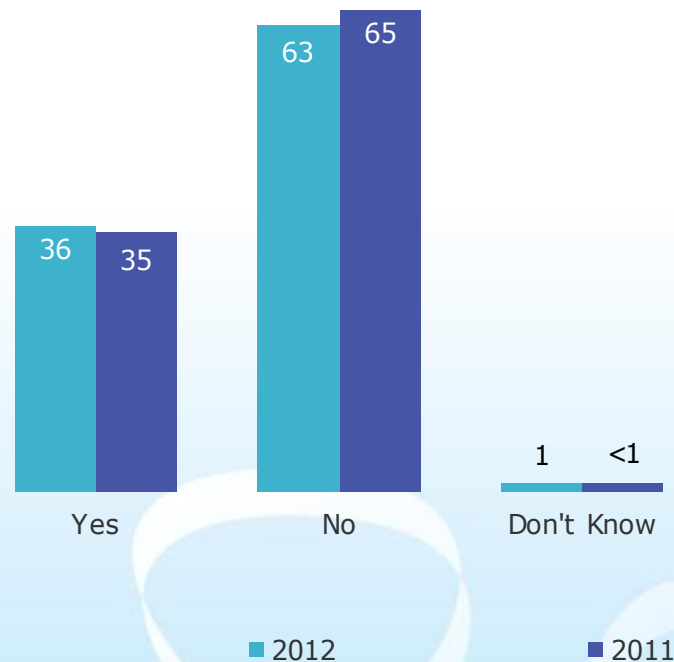
Note: In a library shown as 'In a library (e.g. displays, booklists, staff recommendations)', Online book stores was shown as 'Online book stores (e.g. Amazon, Fishpond, The Book Depository, Booktopia, Dymocks, Angus & Robertson)', Online library material shown as 'Online library material (e.g. catalogue, email newsletters)', and Social media shown as 'Social media (e.g. Twitter, Facebook)' in the questionnaire



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Number of readers who have downloaded eBooks remains stable over 2011-12 – just over one third

Ever downloaded an eBook - %



E1 (Q12) Have you ever downloaded an eBook?

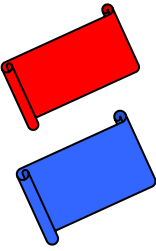
E9 (Q14a) Thinking of the books you have read in the past 12 months, what proportion of books were in print format and what proportion were in eBook format?

Base: Total Sample 2011 n=309; Total Sample 2012 n=797; Those who download eBooks 2011 n=107; Those who download eBooks 2012 n=296



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Amazon and iTunes are equally dominant sources of eBook content – setting the benchmark for range and immediate availability



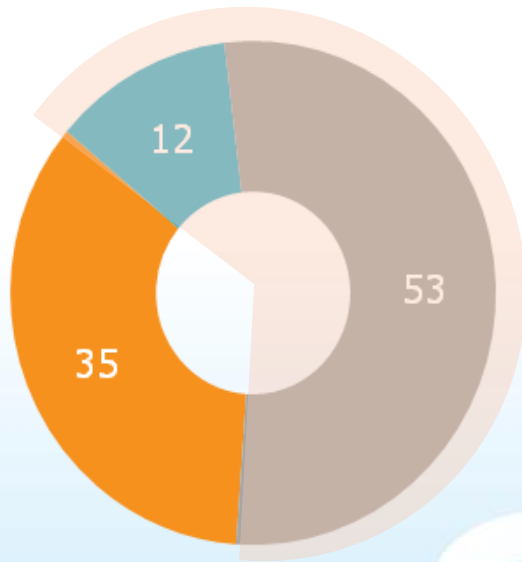
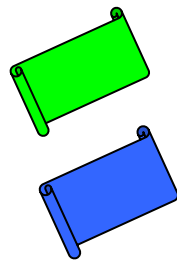
▲ = Significant difference

E6 (Q15a) Where do you download eBooks from?
 Base: Those who download eBooks 2011 n=107; Those who download eBooks 2012 n=296; "Via the Brisbane City Council Library website" code 2012 n=192

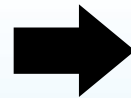


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On average, almost two thirds of eBooks are accessed from free sources – including Libraries



- Buy
- Borrow
- Download/ access for free



Opportunity

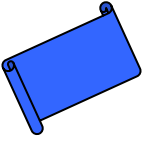
Borrow or download for free = 65%

E7 Thinking about the eBooks you read, what proportion of them do you buy, download/access for free, and borrow from libraries?
Base: Those who download eBooks 2012 n=296



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For those who have never downloaded an eBook – will they ever?



%



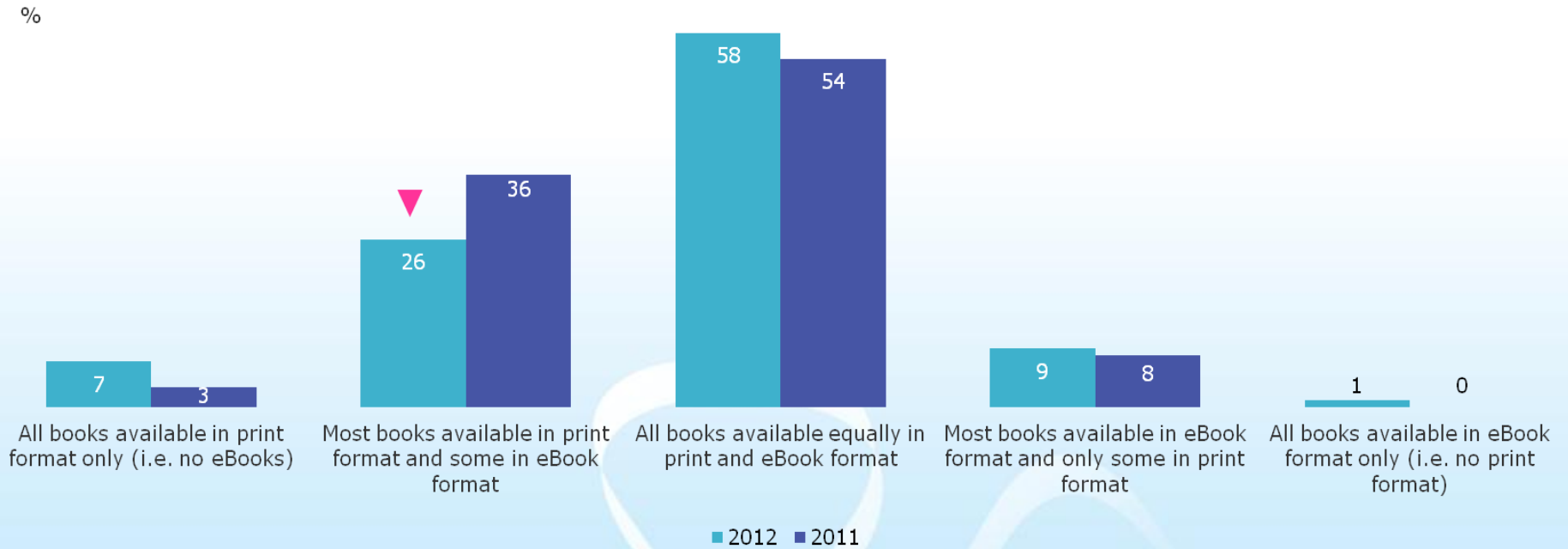
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E3 (Q22) When, if ever, do you think you are likely to start downloading eBooks?
Base: Those who have never downloaded an eBook 2011 n=201; 2012 n=501; Total Sample 2012 n=797



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What do they expect the collection balance to be?



▲ = Significant difference

F3 (Q25) In five years' time, (based on the assumption that all books are available as both eBooks and printed books), what balance do you expect Brisbane City Council Libraries to provide?

Base: Total Sample 2011 n=309 ; Total Sample 2012 n=797

Note: Question wording changed slightly in 2012 from 2011



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- ***Contracts for e-book supply override copyright exceptions and limitations rights provided to libraries by law***

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- *OverDrive as the dominant aggregator*
- ***Consortia being actively discouraged through pricing models***

American Library Association:

“We have met and talked sincerely with many of these publishers. We have sought common ground by exploring new business models and library lending practices. But these conversations only matter if they are followed by action... Books and knowledge — in all their forms — are essential. Access to them must not be denied.”

While there has been some movement by some publishers, it is not enough. Librarians and our allies must speak out more forcefully in communities across the country. Everyone needs to know that libraries offer e-books and 21st century library services, but we are unable to offer all the e-reading choices our patrons need because some publishers refuse to work with us. “

ALA President Maureen Sullivan, September 2012

American Library Association:

- ***Digital Content Working Group***
 - Assist in the identification of strategies to influence decision makers..... to effect changes that would assist libraries in better service to their communities
 - Address specific issues such as Business Models, Accessibility, Privacy, Education for the Library Community, Public Outreach and Publisher/Service Provider Relations through working subcommittees, bringing in other experts ...
- ***E-book Media and Communications Toolkit***
 - *FAQs, example opinion pieces, useful documents, content for media work*

Say hello to your new librarian

There is a silent revolution going on in our libraries. Not long ago, libraries were independent. Free to choose, buy and recommend literature and factual books from amongst all the books that were in print. Then came eBooks...



Front page of the
Swedish Library
Association
Campaign brochure

IFLA

- Digital Content Programme is an IFLA Key Initiative
 - Full day programme on Monday 19th August at IFLA Singapore 2013
- Principles for eLending
 - <http://www.ifla.org/files/assets/hq/topics/e-lending/ifla-principles-for-elending.pdf>

- E-book advocacy page maintained by SLWA

– <http://ebookadvocacy.wordpress.com/>

Canadian Urban Libraries Council developing their own platform

- RFP issued in February
- *“The main objective of this project is to develop a Canadian-controlled infrastructure for the storage and distribution of digital content that can manage multiple lending agreements between publishers and libraries as well as transactions between libraries and patrons.”*

ReadersFirst:

- North American based consortia aiming to work with vendors to achieve seamless access to all library content including e-books;
 - *Search and browse a single comprehensive catalog*
 - *Place holds, check out items, view availability, manage fines etc through individual library catalogs*

<http://readersfirst.org/>

Legislative Approach – US State of Connecticut

AN ACT CONCERNING "E-BOOKS" AND LIBRARIES.

That the general statutes be amended to require publishers of electronic books to offer such books for sale to public and academic libraries at the same rates as offered to the general public.

Statement of Purpose:

To require publishers of electronic books to offer e-books for sale to public and academic libraries at the same rates as offered to the general public.

Legislative Approach – US State of Connecticut

Has been changed to *“requiring the Commissioner of Consumer Protection to report to the General Assembly on the issue by Feb 1 2014”* about the following:

- survey whether & how book publishers & third-party electronic book distributors sell, license or otherwise make electronic books available to users of public libraries
- what problems, if any, exist with current practices regarding the availability of electronic books to users,
- recommendations to increase the availability of electronic books to users of public libraries

Legislative Approach – IFLA Principle 5

When publishers and/or authors and/or resellers withhold library access to eBooks, national legislation should require such access under reasonable terms and conditions.

The footnote to this principle says “ This requirement to ensure community access to all eBooks through libraries is clearly defensible in countries where there is government financial support for publishers and authors”

Thoughts and observations:

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- **Libraries will buy an e-book once, provide access for ever and never buy another copy**

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- **Digital is different**

Book Industry Collaborative Council (BICC)

*“to help the book industry deal with the rapid changes being brought by digitisation and to assist the industry implement recommendations from the Book Industry Strategy Group. The Council will work to maintain a dialogue between the industry and government and to **encourage collaboration between the supply chain sectors** - ensuring this interconnectivity is vital to strengthening the position of the Australian book industry within the global market.”*

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Final thoughts

- *Libraries continue to be locked out of the market*
- *It's a debate about money*
- *This should be a debate about access to information and ideas – one of our core professional values*
- *This should be a debate about how Australia sees its libraries and access to culture*
- *And, about our future*

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- <http://www.ala.org/transforminglibraries/ebooks-digital-content>
- <http://www.lianza.org.nz/about-us/committees>
- <http://www.ifla.org/node/7418>
- <http://www.ifla.org/files/assets/hq/topics/e-lending/ifla-principles-for-elending.pdf>
- <http://ebookadvocacy.wordpress.com/>
- [http://www.culc.ca/cms lib/eBOUND-CULC-RFI-Public-Library-eBook-Lending-Initiative_20120605.pdf](http://www.culc.ca/cms_lib/eBOUND-CULC-RFI-Public-Library-eBook-Lending-Initiative_20120605.pdf)
- <http://readersfirst.org/>
- <http://www.innovation.gov.au/Industry/BooksandPrinting/BookIndustryCollaborativeCouncil/Pages/default.aspx>
- Thank you to Sharan Harvey at Brisbane City Council for sharing the results of their research.



Thank you and Questions?