

E-books and e-lending think tank

The Public Library Story

Sharan Harvey
Manager Library Services,
Brisbane City Council
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Content

- Some publishers will not sell eBooks to public libraries.
- Limited availability of the type of content our customers expect us to have, e.g. latest releases.
- Licence agreements are highly conditional: authors-publishers, publishers-platform owners.
- Local publishing and self-publishing content is limited for libraries if titles are not available via platforms.
- Should publishers be developing the library's collection profile?



Procurement

- Monopoly in the library eBook supply market is changing as new platforms emerge. Duplication of content.
- Procurement models for content include ownership, leasing, subscription, loan limits, patron-driven acquisition & pay-per-use. High fragmentation & favours suppliers.
- Long & short term ownership / license models are needed.
- Minimum purchase requirements imposed by some publishers.
- Pricing of eBooks to libraries bears little relationship to consumer price. Some publishers charge 300% for libraries to 'own' an eBook.
- Consortia can distribute some of the costs, there are issues..





Douglas County Libraries Report Pricing Comparison as of February 1, 2013

	BOOKS				EBOOKS					
	Library Pricing		Consumer Pricing		Library Pricing		Consumer Pricing			
	Baker & Taylor (1)	Ingram (2)	Amazon	Barnes & Noble	Overdrive	3M	Bilbary	Amazon	Barnes & Noble	
Fiction (DCL January 2013 Top circs)										
1	The Racketeer	\$16.04	\$15.92	\$15.83	\$16.46	\$85.00	\$85.00	\$12.99	\$12.99	\$12.99
2	Notorious Nineteen	\$15.51	\$15.40	\$17.00	\$17.51	\$84.00	\$84.00	\$12.99	\$13.99	\$13.99
3	The Forgotten	\$15.51	\$15.39	\$17.75	\$18.45	*	*		\$9.99	\$9.99
4	The Black Box	\$15.51	\$15.39	\$17.75	\$18.45	*	*		\$7.50	\$7.50
5	The Perfect Hope	\$9.60	\$9.44	\$10.25	\$10.98	*	*		\$9.99	\$9.99
6	Merry Christmas, Alex Cross	\$16.06	\$15.94	\$18.00	\$18.71	*	*		\$11.24	\$11.24
7	The Casual Vacancy	\$19.39	\$19.25	\$17.50	\$17.50	*	*		\$8.99	\$8.99
8	The Last Man	\$15.51	\$15.39	\$17.60	\$18.30	*	*		\$9.99	\$9.99
9	Mad River	\$15.48	\$15.37	\$15.98	\$15.98	*	*		\$14.99	\$14.99
10	A Wanted Man	\$15.51	\$15.40	\$17.44	\$17.01	\$84.00	\$84.00	\$13.99	\$13.99	\$13.99
11	The Bone Bed	\$16.04	\$15.92	\$18.05	\$17.91	*	*		\$14.99	\$14.99
12	Low Pressure	\$14.95	\$14.84	\$14.66	\$14.66	*	*		\$8.89	\$8.89
13	Severe Clear	\$14.93	\$12.60	\$14.64	\$14.64	*	*		\$12.99	\$12.99
14	Private London	\$8.99	\$8.84	\$9.15	\$9.88	*	*		\$8.69	\$8.89
15	Flight Behavior	\$16.06	\$15.94	\$17.50	\$18.19	*	\$22.99		\$12.99	\$12.99
Non-Fiction (DCL January 2013 Top circs)										
1	No Easy Day	\$14.93	\$14.82	\$15.43	\$15.58	*	*		\$12.99	\$12.99
2	Killing Kennedy	\$15.51	\$15.40	\$15.39	\$16.66	*	*	\$12.99	\$12.99	\$12.99
3	Proof of Heaven	\$9.59	\$9.43	\$8.79	\$10.05	*	*	\$11.65	\$8.35	\$8.74
4	Killing Lincoln	\$15.51	\$15.40	\$16.75	\$17.08	*	*	\$12.99	\$12.99	\$12.99
5	Wild	\$14.38	\$14.27	\$14.74	\$15.18	\$25.95	\$25.95	\$9.03	\$12.99	\$12.99

source: Douglas County Libraries Top Circulating items for January 2013

- * Not available for sale
- 1 Discounted pricing as advertised on website
- 2 Actual

Douglas County Libraries is the public library of Douglas County, Colorado, headquartered in Castle Rock, CO. Our annual collection budget (2013) is \$3.4 million. We serve a population of just under 300,000. For more information, contact Karen Gargan, Associate Director of Finance, kgargan@dclibraries.org. www.DouglasCountyLibraries.org

Reading Discovery

- eBook records integrated with the catalogue is critical for the user experience – 1 stop shop concept.
- Public Libraries are powerful sources for discovery of new reading.
- Public Libraries core business is to create new audiences for reading – literacy and literary programs.
- Public Libraries foster writing and author popularity – mutual interests in author success.
- Public Library customers lead eBook takeup within the reading community.



Lending & Operations

- Any friction in the lending process is a major barrier for library customers.
- eBooks do not attract late fees or holds fees.
- Apps can be great but... they can hinder awareness of new library offers;
- Apps can dilute the library brand in favour of supplier recognition.
- Some libraries lend pre-loaded eBook readers.
- Support for a form of Public Lending Right.
- Supplier Rights Vs. Customer Privacy.
- Standard statistical reporting.



Access

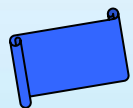
- Library customers compare us with Amazon and iTunes – simple to use, range, immediate availability.
- Customers want access to worldwide content, just like in print. iTunes & Amazon sell globally - library customers don't understand the geographic restrictions.
- Low awareness of the availability of eBooks from Public Libraries – current collections not ready for marketing & promotion campaigns.
- ILL's for eBooks?
- Public Libraries are a 'Go To' place to learn about eBooks and get technical support
- The range of devices is challenging to support.



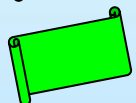
The research methodology

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

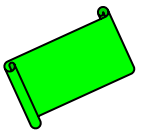


• Issues for libraries

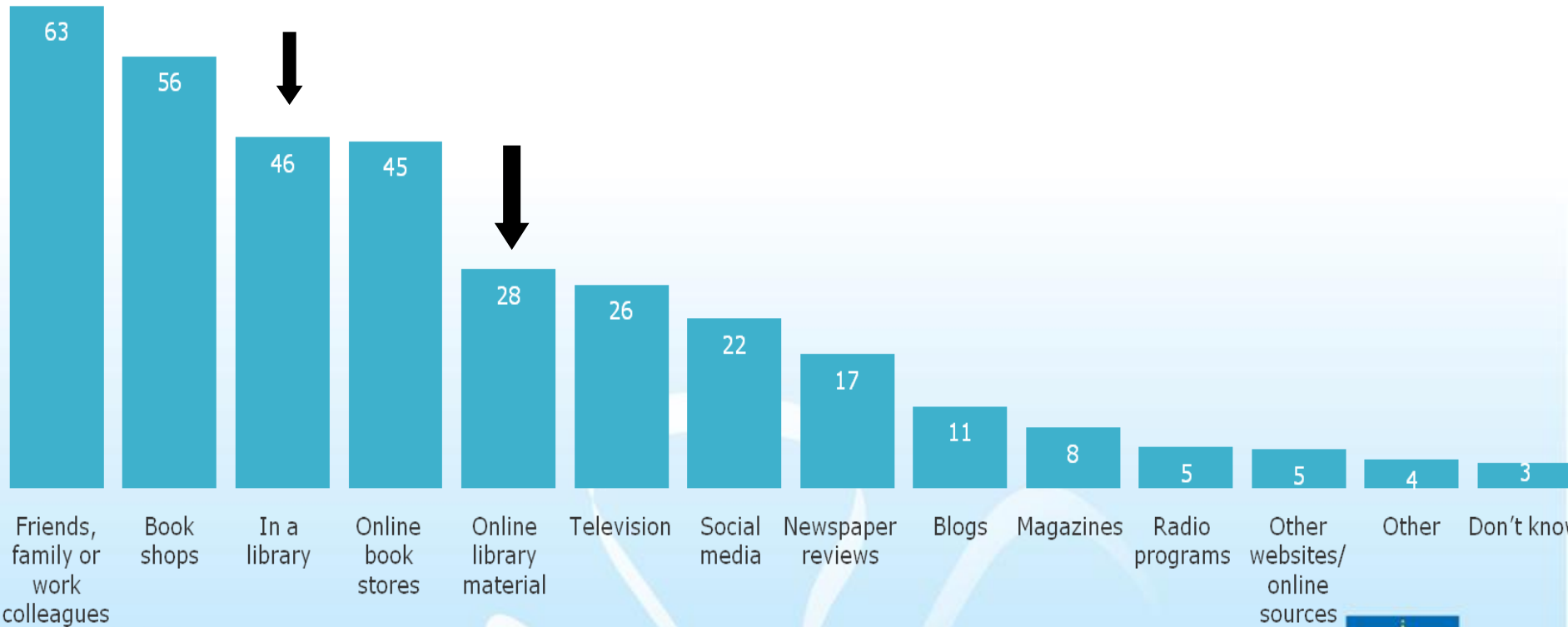


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Libraries play an important role in reading discovery



- 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

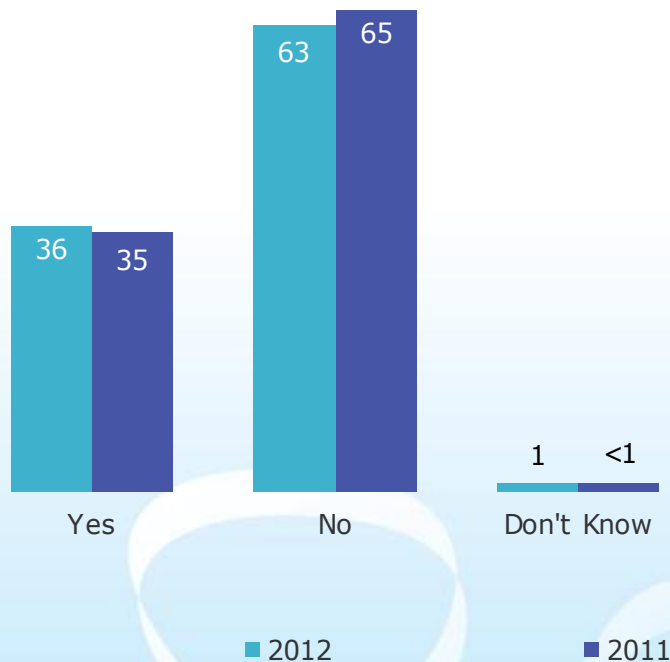


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Number of readers who have downloaded eBooks remains stable over 2011-12 – just over one third

Ever downloaded an eBook - %

More Council library members have downloaded an eBook than non members (39% vs. 31%)



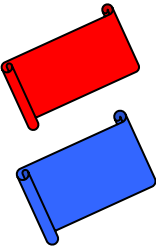
E1 (Q12) Have you ever downloaded an eBook?

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



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



Torrent websites, Google, Kobo



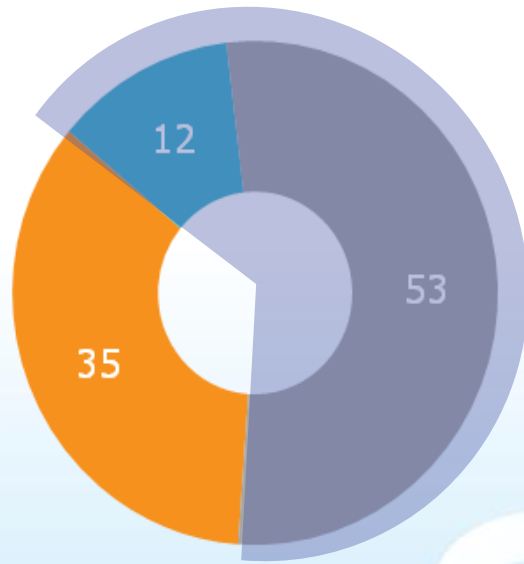
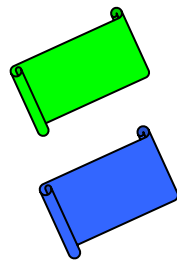
▲ = Significant difference

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

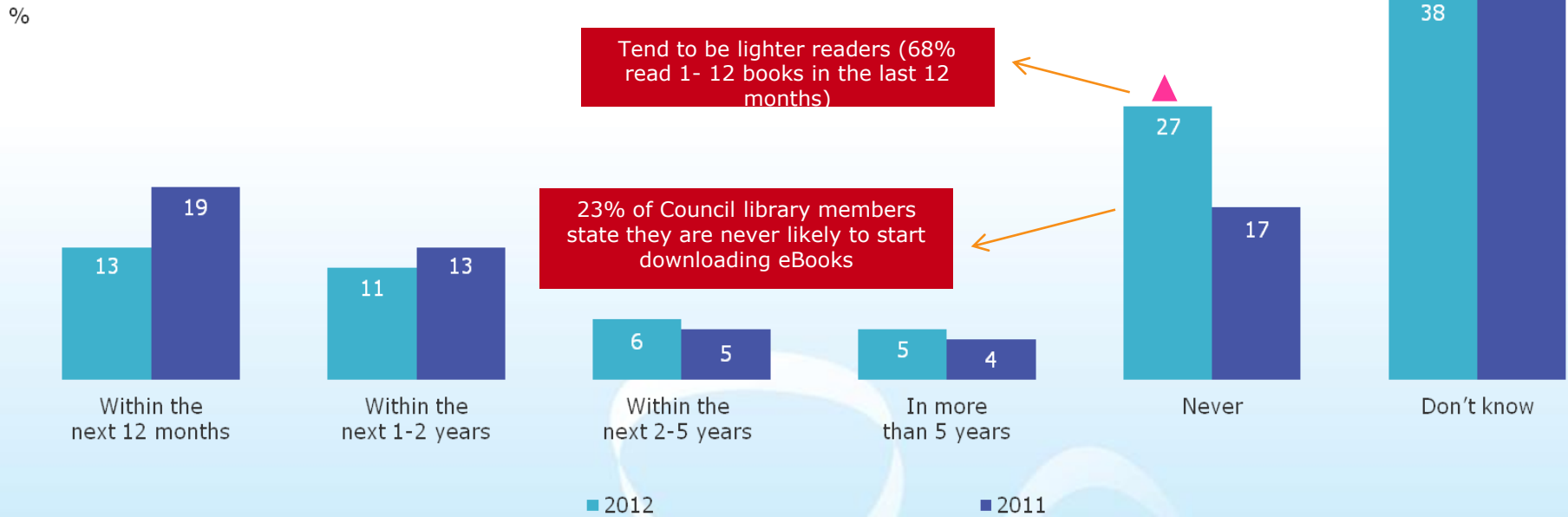
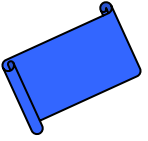
Borrow or download for free = 65%

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?



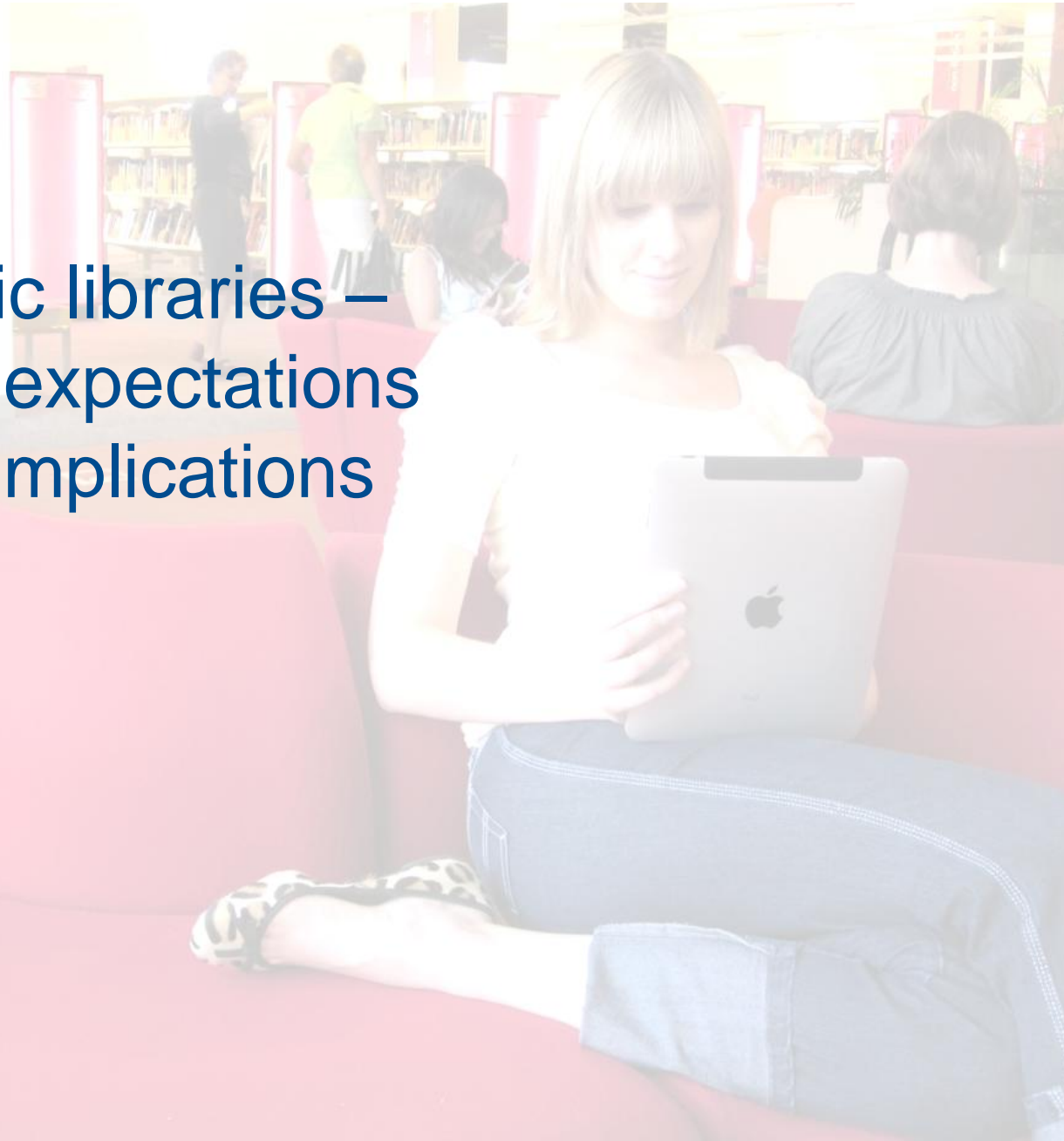
▲ = Significant difference

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

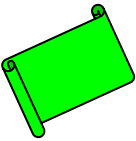


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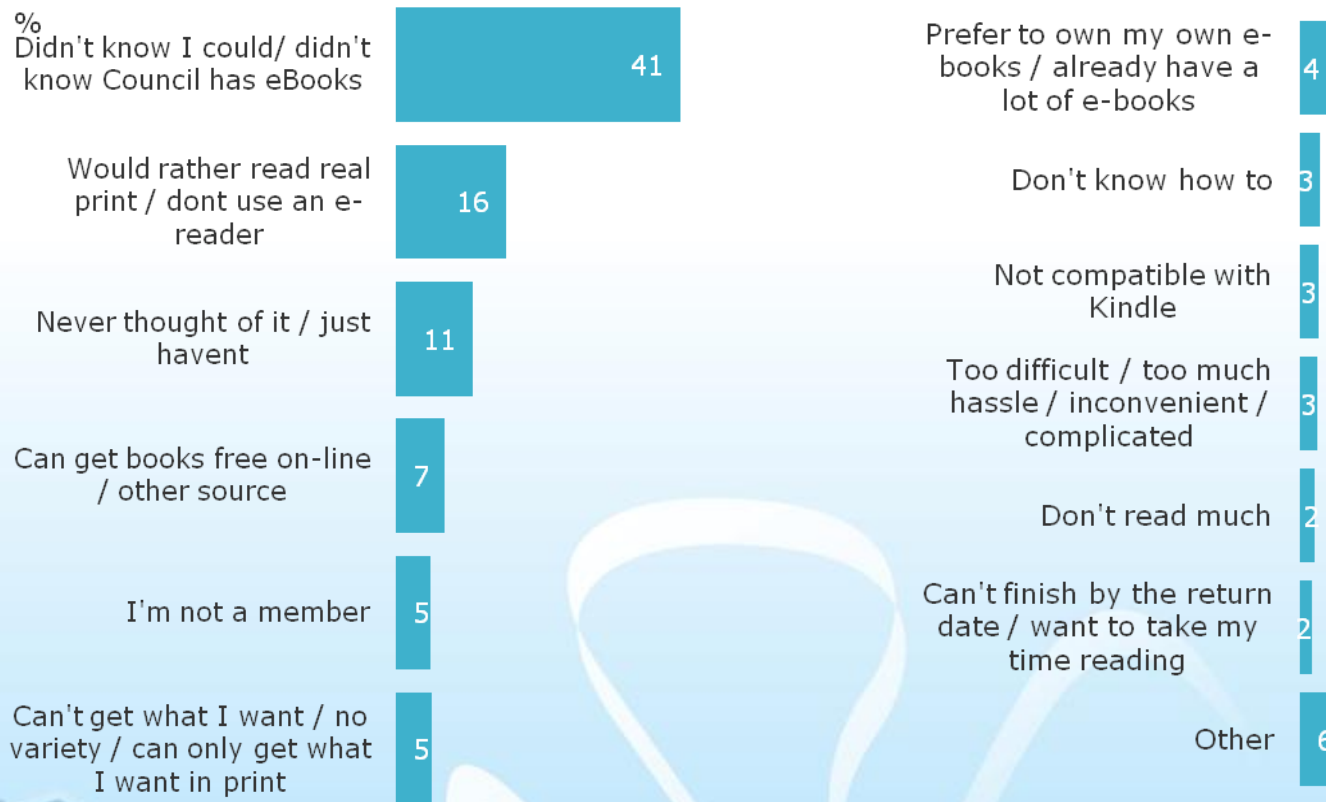
Public libraries – use, expectations and implications



85% eBook readers not utilising Council eBook collections – Why?



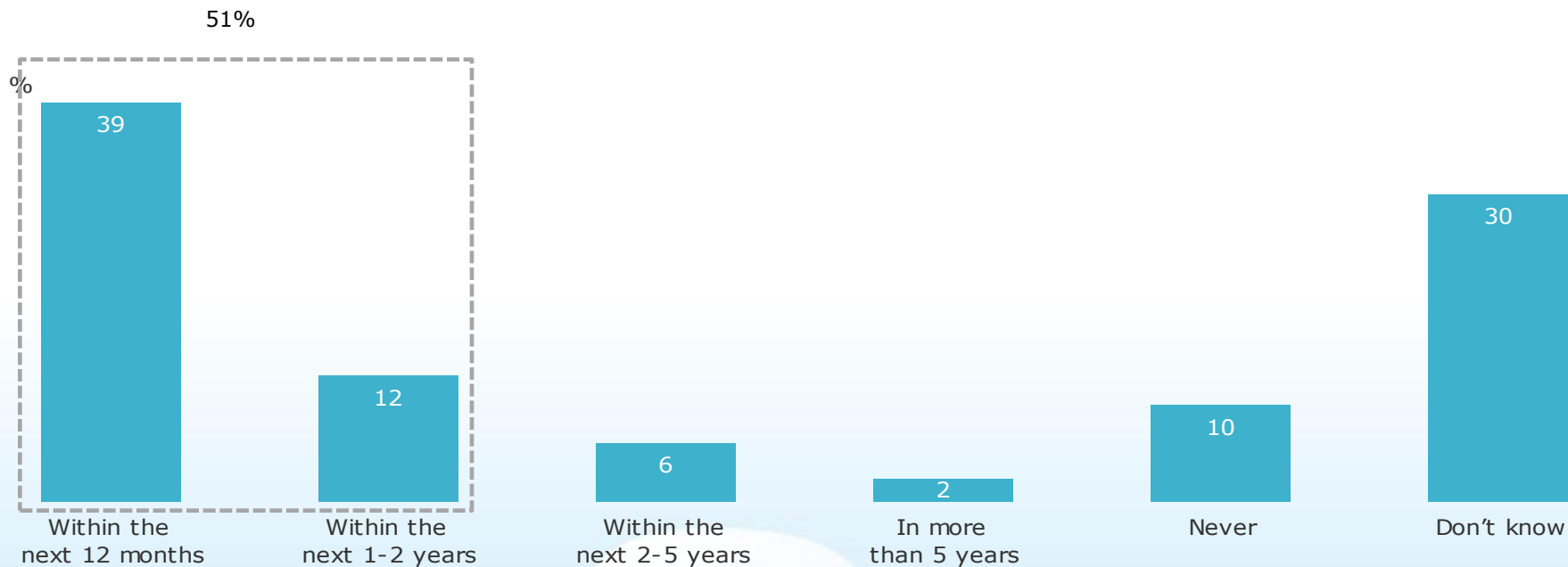
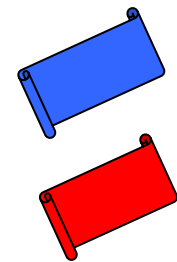
The primary reason for not borrowing eBooks from Council libraries is driven by a lack of awareness



F4 You previously stated that you don't borrow eBooks from Brisbane City Council libraries... Why don't you borrow eBooks from the Brisbane City Council Library website?
 Base: Those who have not downloaded/ accessed eBooks from BCC library website n=270



When do they intend to start?

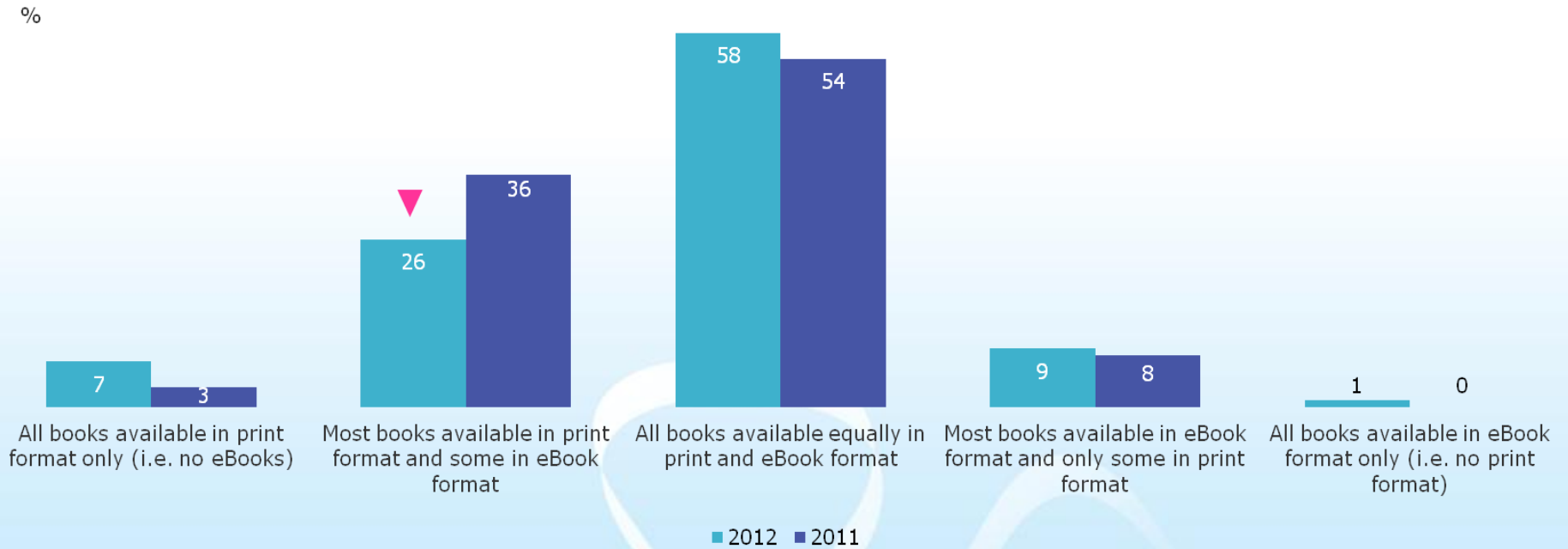


F5 And when, if ever, do you think you are likely to start borrowing eBooks from the Brisbane City Council Library website?
Base: Those who have not downloaded or have not accessed eBooks from BCC library website n=270



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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

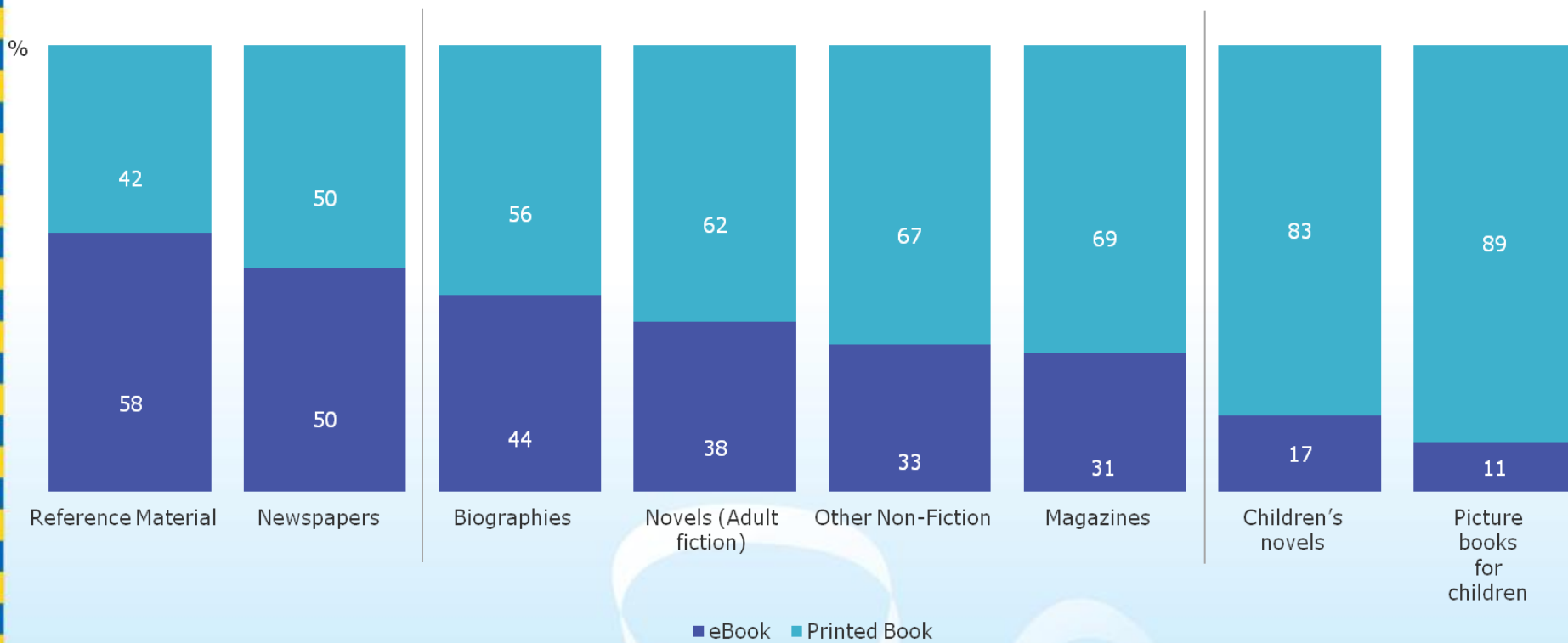
Note: Question wording changed slightly in 2012 from 2011



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Bookshelves of the future - Physical Vs. eBookshelves

- There is a clear preference for children's books (novels and picture books) to be in printed format.



E13 In five years' time, assuming that all content is available on eBook and printed book format, which format would you prefer for the following types of books?
Base: Total Sample 2012 n=797



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Thank you.

Contact:

Sharan.Harvey@brisbane.qld.gov.au



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