Summary report on a survey of e-book provision in Swedish public libraries

1. Introduction.

A survey was carried out in October, 2012 of all public libraries in Sweden. A total of 291 questionnaires were issued and 225 or 77.3% began to complete the questionnaire. However, only 185 fully completed it, an effective response rate, after three follow-up messages, of 63.6%. The SurveyMonkey online survey service was used for the study. The percentages reported below are the percentage of people responding to a specific question.

2. E-book service.

Ninety-five per cent of libraries indicated that they offered an e-book service to their users; however, only 19 or 9.6% of those answering the question (i.e., 197) claimed to have a formally document policy underpinning the e-book service. Seventy percent (14) of those who did have a policy declared that it was publicly available and nine respondents indicated a Website address as the location of the policy while one sent a document file to the investigators. In most cases, however, the policy was simply a statement of the availability of e-books and the rules governing their lending and in a couple of cases the link was to the e-book lending page, with no further explanation.

When asked what factors determined the decision to offer e-books, the responses commented on the demand from readers, the need to develop services appropriate in the 21st century, the fact that an e-book is simply another medium and should be offered just as print books are offered, and, importantly for some, the opportunity was offered to participate in county-wide collaborations in the provision of e-books. A number also commented that the service was a way of attracting new readers to the library.

Typical comments included:

“Efterfrågan och att vi vill erbjuda tillgång till media i olika former.”  
[Demand and we want to provide access to the media in various forms]

“Biblioteket ska naturligtvis erbjuda alla typer av medieformat. Komplement till den tryckta boken, ger möjlighet för fler låntagare att läsa boken samtidigt, inga köer. Möta låntagarnas krav på att erbjuda ny teknik, nya medieformat. Ge låntagare möjlighet att testa nya sätt att läsa.” [The library will of course provide all kinds of media formats. Complement to the printed book, allowing more borrowers to read the book at the same time, no queues. Meet borrowers' requirements that we offer new technology, new media formats. Give borrowers the opportunity to test new ways of reading.]

“Vi måste finnas med där boken finns, är det ny teknik måste vi som bibliotek erbjuda det. Självklart! E-böcker är ett viktigt komplement till vanliga böcker och den är oslagbar när det gäller tillgänglighet.”
[We must be where the books are, it is new technology, as libraries we must offer it. Of course! E-books are an important complement to regular books and are unbeatable in terms of accessibility.]

“Flera bibliotek gick samman och skrev avtal med E-lib! Viktigt att all media finns tillgänglig via biblioteket en jämställdhetsfråga! Biblioteken måste ”hänga med” i utvecklingen!” [Several libraries banded together and signed an agreement with E-lib! Important that all media are available through the library – an equality issue! Libraries will need to "keep up" in development!]

“En möjlighet att låna böcker 24-timmar om dygnet” [An opportunity to borrow books 24 hours a day]

“Att fler får tillgång till nya böcker samtidigt.” [More people have access to new books simultaneously.]

“Förhoppning om nya låntagare” [Hope to attract new borrowers.]

The chief means whereby e-books were acquired were through licensed access to a provider’s platform, which, for the most part meant the service offered by Elib (86.7%) and through access to free e-book sites (28.1%) [Note that more than one response was allowed in this question.] Only very few libraries said that they bought e-books with full ownership and lending rights (3.0%). In fact, the true proportion using Elib was a good deal higher, since most of those claiming some other mode of acquisition actually referred to Elib and county collaboration in access to Elib. This brings the total involved in this mode of access to virtually 100%.

3. Problems with licensing.

Respondents were asked if they experienced any problems in the provision of e-books as a result of licensing arrangements with providers. Of those responding to the question, 68% said that they did experience problems. When the identified problems are analysed, it is clear that there are many reasons for dissatisfaction, many commented on the following issues:

- the cost of each loan and the resulting inability of the library to budget effectively because of not knowing the potential demand;
  “Efterfrågan ökar hela tiden vilket medför ökade kostnader för biblioteket.” [Demand is increasing all the time, leading to increased costs for the library.]
- the fact that the library staff do not control the selection of titles for users, but must accept what Elib provides;
  Vi kan inte bestämma vad vi vill köpa in, vilken litteratur vi vill föra fram och erbjuda låntagarna. Det känns hemskt att vara fast i en leverantörs händer. [We cannot decide what we want to buy, what literature we want to promote and offer to borrowers. It feels awful to be dependent on the vendor.]
- Elib’s management of the resources, with a ‘quarantine’ period before new books are released, the limited range of available e-books; the lack,
especially, of children’s books, the haphazard withdrawal of titles from availability;

“Att förlagen håller vissa böcker i karantän och plockar bort titlarna hopp som hopp. Att titelbredden är mycket liten för vuxna och nästintill obefintlig för barn och unga.” [The publishers keep certain books in quarantine and removes the titles willy-nilly. The title choice is very small for adults and virtually non-existent for children and young people.]

- technical problems, with downloading, with the range of permissible devices, with the unfriendly interface;

“Ibland kan det vara problem med nedladdningar och framförallt vill man kunna använda smartphones.” [Sometimes there can be problems with the downloads, and above all one wants to be able to use smartphones]

A smaller number mentioned the fact that e-books were excluded from the inter-library loan system and that the fundamental problem was the monopolistic supply system.

One respondent mentioned what we might call ‘being caught in a cleft stick’:

“Att inte kunna erbjuda alla e-böcker som efterfrågas” [Not being able to offer all the e-books that are in demand.]

Respondents were asked what effect these problems had on their users and, overall, the answers were mainly two-fold: 1) because of the limited range of titles from the Elib service, readers were not able to access all the titles they might wish, and 2) because of the cost, it was not possible for libraries to allow unlimited use of the service. If the budget was used up, it would be necessary to end the service until the next budget period.

4. Marketing the service.

As the graph shows, the most common way of marketing the service was through the library’s Website (99%), followed by direct contact with the users and the issuing of brochures, bookmarks and other documentation. Courses on the use of e-books were offered by a substantial minority of libraries – 29%.
5. E-books and the catalogue

Sixty-eight per cent of respondents answering the question (i.e., 129 of 189) said that they included the details of e-books in the library catalogue. Of these, 83% said that they used the data from the supplier to do so and only 13 libraries (17%) said that they supplied additional data. Those not using the library catalogue said that they simply provided access to the Elib portal through their Website.

6. User education.

Those offering training (49%) provided information on a variety of aspects of e-book and e-reader user, as shown in the graph.

Most commonly, users were taught how to download the e-books when in the library, and remotely and how to use library resources in general at a distance. More than half of the libraries also gave instruction on how to use the catalogue to locate e-books, how to select an appropriate e-reader, and the conditions under which e-books could be borrowed. A smaller proportion (40%) gave instruction on the use of apps such as the Kindle app for the iPad.

Other, written-in responses, included:

“Instruktionsfilm på You-tube” [Instruction videos on YouTube]

“How man använder bibliotekets "Mediejukebox" som erbjuds av FörlagEtt.” [How to use the library's "Media Jukebox" offered by FörlagEtt.]

“Vi hade en e-bokscirkel där både teknik och litteratur diskuterades” [We had an e-book circle where both technology and literature were discussed]

“Vi har drop-in. De som har läsare och vill ladda ner från vårt bibliotek, kontaktar oftast oss innan, eller dyker bara upp på biblioteket.” [We have drop-in. Those readers who would like to download from our library, may contact us before or just appear at the library.]
Asked which groups of users were targeted for training, virtually all responded “Everybody”, sometimes with a little variation, e.g.,

“Alla låntagare, även om det största intresset finns bland äldre som saknar tillräckliga datorkunskaper.” [All borrowers, although the main interest is among the elderly who lack sufficient computer skills.]

Some respondents did mention specific groups and, most commonly, elderly persons, school groups, adult students and those with limited technology skills.

Those offering training generally believed that it was effective (49%), although a significant proportion (45%) did not know how effective the training was and 6% believed that it was not very effective.

7. Relationships with book suppliers

The libraries were asked how their use of e-books had affected their relationships with other book suppliers and more than half of respondents (55%) said that, although they did not provide e-books, they did not appear to be worried about the situation. Another 35% said that there was no effect because their suppliers also deliver e-books. Twelve per cent said that their suppliers are looking for information on how to get involved in the supply of e-books.

8. Assessing the demand for e-books

The libraries were asked how they assessed the demand for e-books and 168 answered the open question on the subject. A majority (64%) used words that described and increasing demand for e-books, sometimes noting that, if the increase in demand continued, the cost implications would be significant for the library. About 26% of the respondents noted that demand was ‘small’ or ‘weak’ or ‘moderate’, often adding that an increase was, nevertheless, taking place. Some noted that it was a very small minority of users who were requesting e-books and others commented that the demand for audio books was higher.

Interesting comments included:
Vi ser en viss ökning i statistiken, men märker ingen direkt större efterfrågan direkt på biblioteket. Störst efterfrågan på e-ljudböcker, men de blir besvikna när de får veta att det bara är strömmande ljudböcker. [We see a slight increase in the statistics, but find no direct greater demand directly to the library. The greatest demand for e-audio books, but they are disappointed when they find that it is just streaming audio books.] Efterfrågan har ökat om än inte lavinartat. Av de totala utlånen utgör e-böckerna bara någonstans mellan 2-3%. [Demand has increased, though not dramatically. E-books are only somewhere between 2-3% of total lending.]

Efterfrågan eller rättare sagt användningen av e-böcker har fördubblats varje år sen vi startade med utlåningen. Inom ett par år kanske det inte räcker med en fördubbling utan efterfrågan kommer att öka mer ordentligt. Framför allt inom skolbibliotekssverksamheten. [Demand or rather the use of e-books has doubled every year since we started with lending. Within a few years it may stop doubling, but demand will increase more regularly. Especially in school library operations.]

Växande. Men det finns också många som inte vill läsa e-böcker utan säger att de provat men att det är bättre med tryckt media. Studenter vill gärna ha den tryckta versionen även om en text finns fritt ute på nätet, kanske lite beroende på textens längd, ju längre text ju mer efterfrågad är den tryckta varianten. [Growing. But there are also many who do not want to read e-books, but say they have tried but it’s better with the print media. Students would like to have the print version even if a text is free on the net, maybe a bit depending on their length; the longer the text, the more demand is for the printed version.]

Tror att det ökar mer och mer. Tyvärr måste man lösa kostnaderna på annat sätt annars blir det stora problem för biblioteken. [Think it is increasing more and more. Unfortunately, one must resolve the costs, otherwise it will be big problems for libraries]

9. User satisfaction

Only three libraries reported having carried out any reader satisfaction study in relation to e-books and only one of these reported the results, which were that readers were highly satisfied with the service. Ninety-eight per cent of the libraries responding to the question (i.e., 179 out of 182) had carried out no survey.

Only three libraries reported on comments from readers about their e-book service and these related to such matters as understanding the relationship between formats and readers, and the fact that resources meant that loans had to be limited. One library reported having carried out a survey, but noted that the results were too extensive to be reported in the questionnaire.

There may be some connection here with the finding that the majority of libraries had no formal policy relating to e-books, they were simply either responding to demand or felt that all materials in whatever format should be available for lending. Without a policy and without user requirements and
satisfaction studies, it is difficult to see how a case for an appropriate budget, to meet demand, can be formulated. On the other hand, 91.4% of respondents said that they intended to carry out a user satisfaction survey, so perhaps, ultimately, the results will help to determine policy.

10. The limits of the present system and possible remedies.

We have seen, earlier, that librarians are concerned that Elib is operating a virtual monopoly in the provision of e-books, at a cost that some libraries find too high, and with various limitations on supply. It is not surprising, then, that almost 86% of respondents said that there was a need for a library consortium to be created to supply e-books. Sixty-nine per cent of respondents felt that the means for the supply of e-books in Swedish was less than satisfactory and when asked what should be done to improve things, said, in effect, that ways should be found to overcome the limitations of the current system.

Typical comments included:

- Nationell överenskommelse om annan prismodell, statligt stöd. [National agreement on different pricing model, state aid.]
- Biblioteken måste själva omfördela sina resurser till en ny verklighet. [The libraries themselves must reallocate their resources to a new reality.]
- Ett större utbud från förlagens sida, digitalisering av äldre titlar, ingen karen på nya titlar... [A wider range from the publishers' side, digitization of older titles, no waiting period for new titles...]
- Sloppe karenstid för nya böcker på svenska. Få till avtal som möjliggör att kunna erbjuda även översatta titlar. [Abolish the waiting period for new books in Swedish. Get an agreement that enables even translated titles to be offered.]
- Fler e-bokleverantörer skulle skärpa konkurrenscens och förhoppningsvis förbättra utbudet. En annan förhoppning är även att de mindre förlagen skulle kunna komma in på marknaden. [More e-book providers would increase competition and hopefully improve the range. Another hope, also, is that the smaller publishing companies could enter the market.]
- Särskilt tillgången till litteratur för unga är helt underrätat. Eftersom barn använder Ipad och datorer en-till-en i skolan är detta ett problem. [In particular, access to literature for young people is quite poor. Since children use iPads and computers one-to-one in the school, this is a problem.]

Almost 63% of respondents said that they did not offer e-books in languages other than Swedish. Those that did offer other languages included the following:

- English – 38 respondents
- Danish – 9
- Spanish – 4
- French – 4
A number commented that they offered books in whatever languages Elib made available, while another simply said, “Seven languages in addition to Swedish”. However, examination of the Elib site suggest that very few books are made available in languages other than Swedish.

11. Intentions to provide e-books

Of those libraries not offering an e-book service at present, 94.5% (52 libraries) said that they intended to do so in the future. However, when asked if they had a specific time-table for offering the service, only 34 responded and, of these, 91.2% could not specify a date by which the service would be available.

12. Conclusion

Questionnaire surveys, especially online surveys, can never be as effective as interview surveys. There are a number of reasons for this, chief of which are that people become tired of being asked to complete questionnaires and that it is easy to ignore the request and/or fail to complete the questionnaire – as we see here.

However, although a 100% response rate was not achieved, the survey has sufficient response for us to believe that it properly represents the state of e-book provision in Swedish public libraries today. That provision is dominated by the e-book provider, Elib which has a monopoly position as a result of being established by a consortium of the major publishers in the country.

The results of the survey reveal that librarians find this situation unsatisfactory: they find the operations of Elib in the provision of titles to be arbitrary, with titles being removed from the catalogue without warning or explanation, with too few titles for children and students, and with delays in access to popular titles. Furthermore, the establishment of a monopoly of this kind (which may, in fact, be contrary to the EU’s laws on competition) is believed to prevent, or inhibit, the entry of small publishers into the e-book market. As an aside, there are possible answers for small publishers: they might be able to enter into agreements with Amazon or with Apple’s iBook Store for the provision of electronic versions of their books. This would then give them access to two of the most common e-book reading devices, the Kindle and the iPad.

It is clear that the provision of an e-book service has arisen as a result of either demand or an ideological belief that the ethos of democratic values and equality of access requires libraries to offer material in all media, and the e-book is simply the most recent medium. However, this position has some disadvantages: first, there is a lack of formal policy regarding provision of the
service. By this we mean that it appears that no goals or objectives of service provision are set, there is no evaluation process to determine whether the goals are being satisfied, and the lack of user satisfaction surveys (although these are promised by a number) means that evidence to present to potential funders will be lacking.

Given the librarians’ desire for a more equitable and open system of e-book provision, there is clearly a need for studies that address users’ satisfaction with the existing state of affairs, the extent to which they buy as well as borrow and the sources from which they buy, and the extent to which information needs (rather than leisure requirements) are being met by e-books. The quoted lack of resources for students and school-children, suggests that the latter issue is significant.

It is evident, from experience not only in Sweden but, especially, the USA, that the demand from readers for e-book lending services is likely to increase and, in time, the e-book may become the dominant medium for much material that is currently printed. Study and reference materials are likely to be the first to experience this, with scholarly research titles being not far behind. Already, academic libraries in Sweden are buying significant numbers of e-books, or licensing their use, and, in some cases the spend on e-books is approaching and in some cases exceeding the amount spent on print books.

The trend is already observable with the recently-established publisher, Morgan and Claypool, in the USA, offering its titles as PDF files, and with the long established O’Reilly, publishing mainly in the IT and computer science fields, offering most of its books through its own electronic library. Another small publisher in the field of photography, Craft and Vision, offers its publications only in PDF format.

Given the trends, it seems highly improbable that the present situation in Sweden will persist. More and more libraries will be able to buy e-books directly from publishers, if not in Sweden, then certainly from abroad and the pressure on Swedish publishers to adapt to this situation will be irrepressible.

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Prof. T.D. Wilson and Prof. E. Maceviciute
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