

NSW.net eLending and the Digital Library

The future of public library collections: understanding what readers really want

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Manager Library Services
Brisbane City Council
20 September 2013



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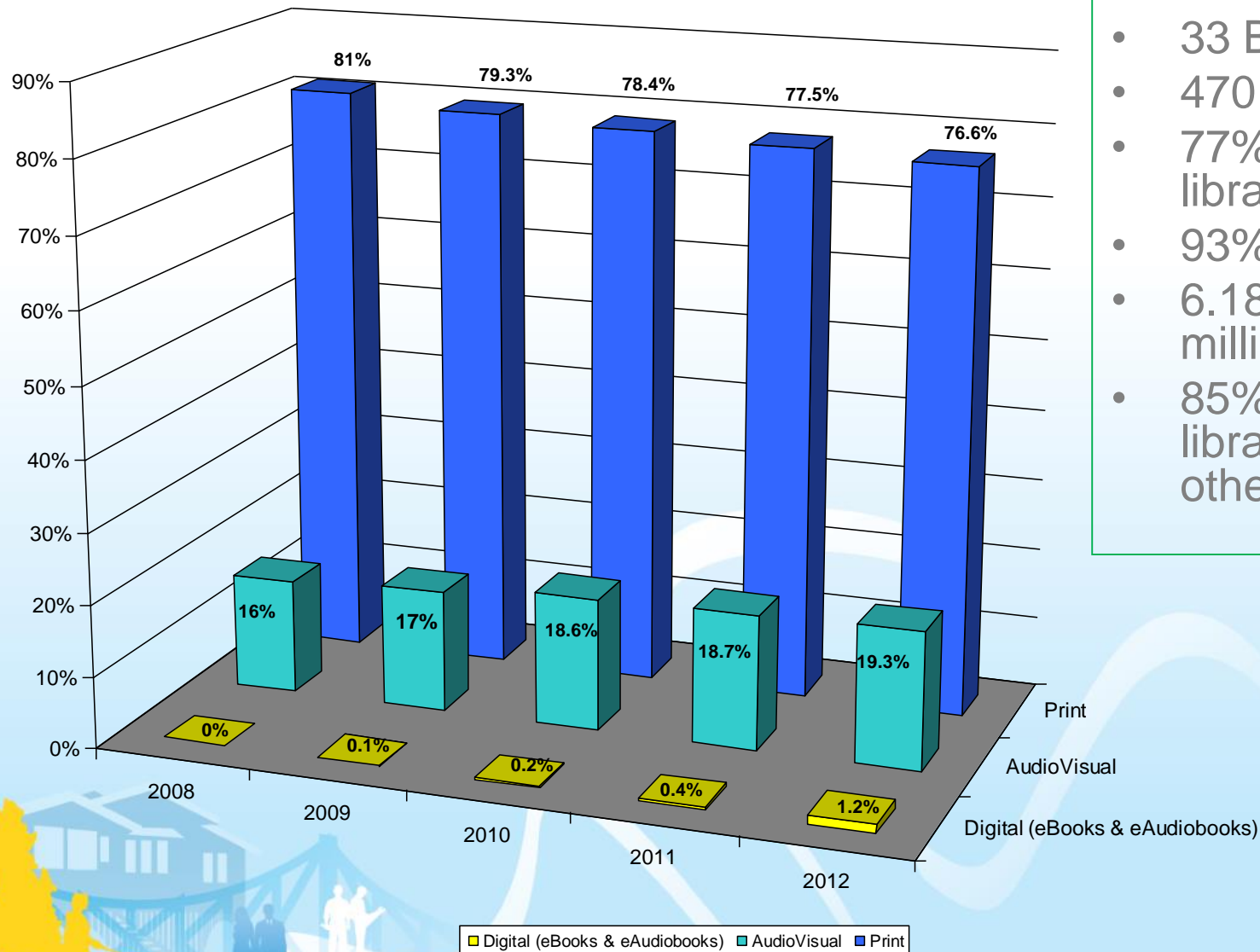
Our Vision

**Libraries will be Brisbane's favourite
lifelong way to
connect, read, learn, work, relax...
and explore new ideas**



Context:

% of Loans by Format



Brisbane City Council Libraries

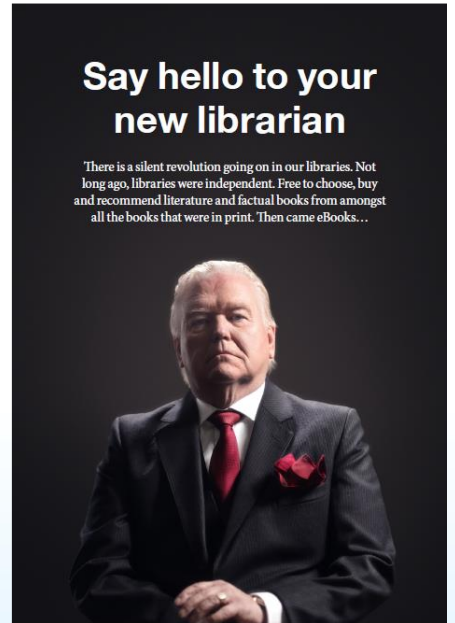
- 33 Branches
- 470,000 members
- 77% of residents use the library service
- 93% Customer Satisfaction
- 6.18 million visits and 9.5 million loans per year
- 85% of visitors to the library borrow books or other materials



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The transition to eBooks in public libraries: great opportunities plus a few challenges

- Customers are increasingly reading in eBook format.
- Customers are frustrated by the lack of new release eBooks available through public libraries.
- What is the right size for the physical collection in public libraries in 5 years?
- For how long will mainstream publishers produce printed books?
- In Bexar County, USA the first 'bookless' public Biblio Tech library has opened – this is no longer shocking, but is it really the future of the public library?
- What is the impact of eBooks on library space?
- Who is driving the collection profile and pace of eBook transition in public libraries?



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We needed to find out...

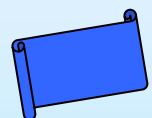
- The current reading behaviour of residents across the city
- Current perceptions and use of eBooks and residents' future intentions
- The expectations and implications for Public Libraries collections in future
- The impact on the physical library
- The implications for reading discovery



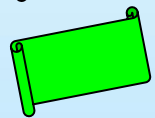
The research methodology

Online Survey 2011 and 2012 by TNS Research

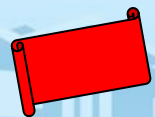
- Residents (users and non-users) who had read at least one book in 12 months
- Sample 2011 n=309; 2012 n=797
Total=n1106
- Survey data weighted by age and gender to reflect Brisbane population



• Drivers of change



• Opportunities for libraries



• Issues for libraries



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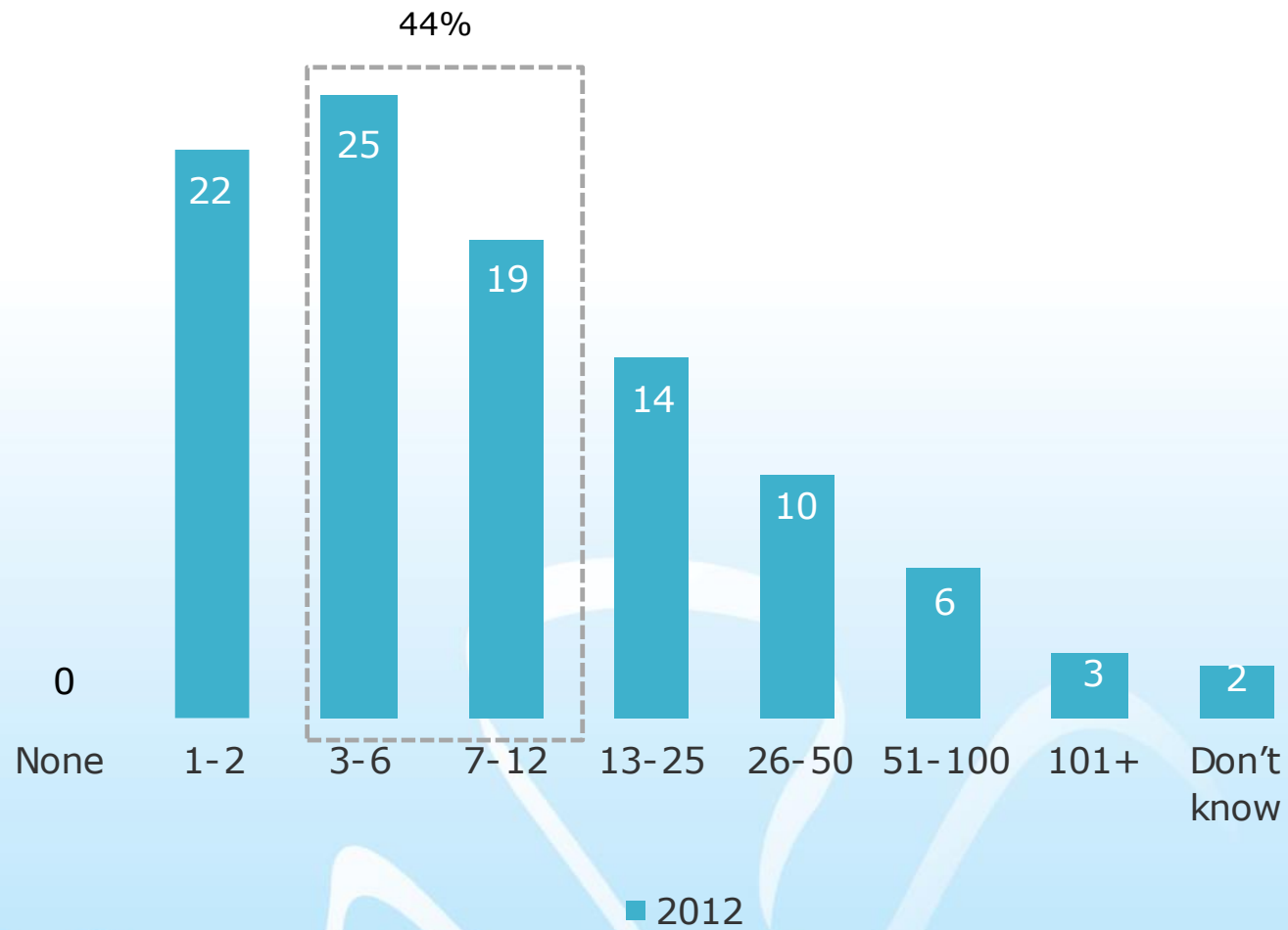
1

Reading behaviour of residents across the city



How much are we reading?

- 44% of readers read between 3 and 12 books in the past year.
- The volume of books read by Brisbane readers in 2012 compared to 2011 is stable.

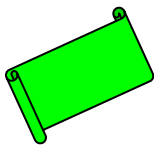


S3 How many books have you read in the last 12 months?
Base: Total Sample 2011 n=309; Total Sample 2012 n=797

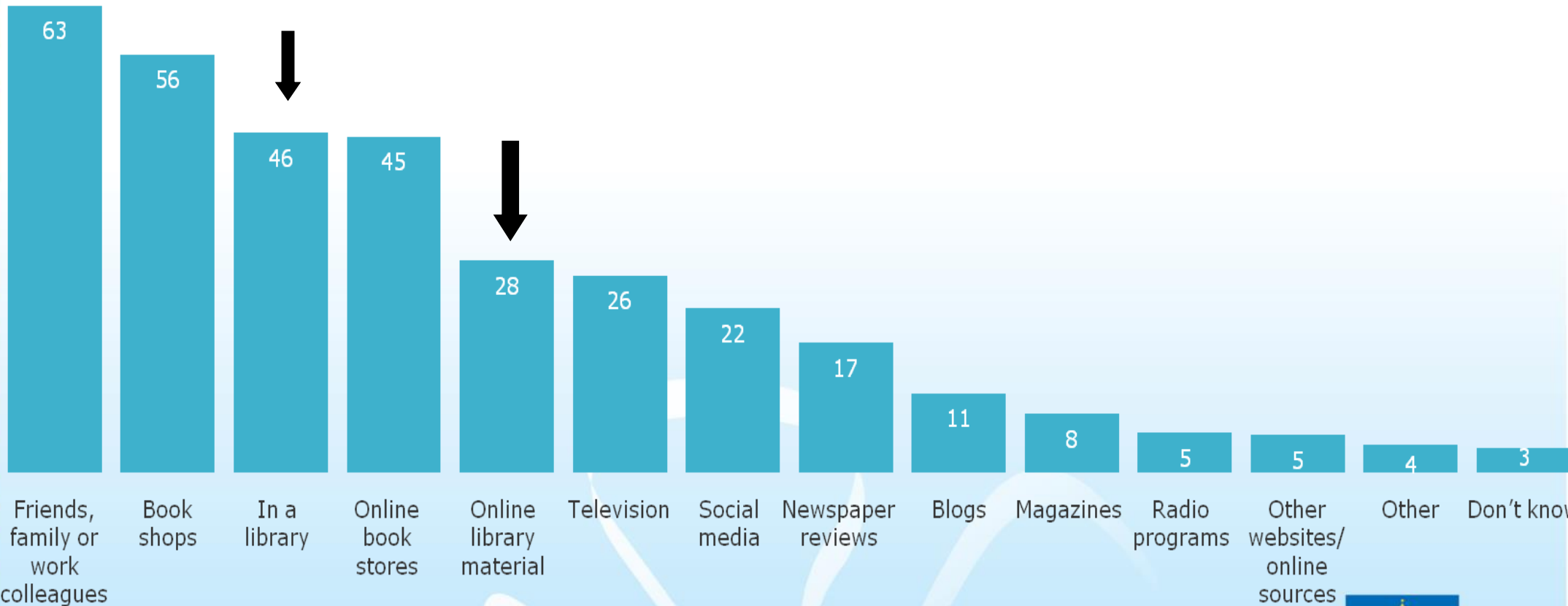


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Libraries play an important role in reading discovery



- 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?

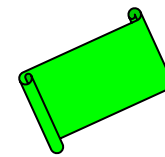
Base: Total Sample 2012 n=797

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



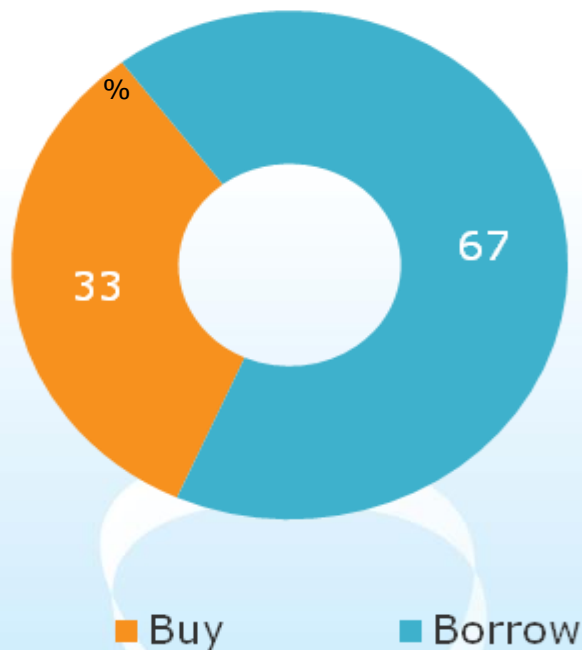
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To Buy Vs Borrow



Of those readers who both buy and borrow their books - for every book that is bought, two books are borrowed. This is stable.

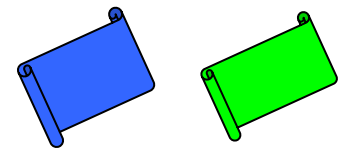
Average proportion of buy versus borrowing



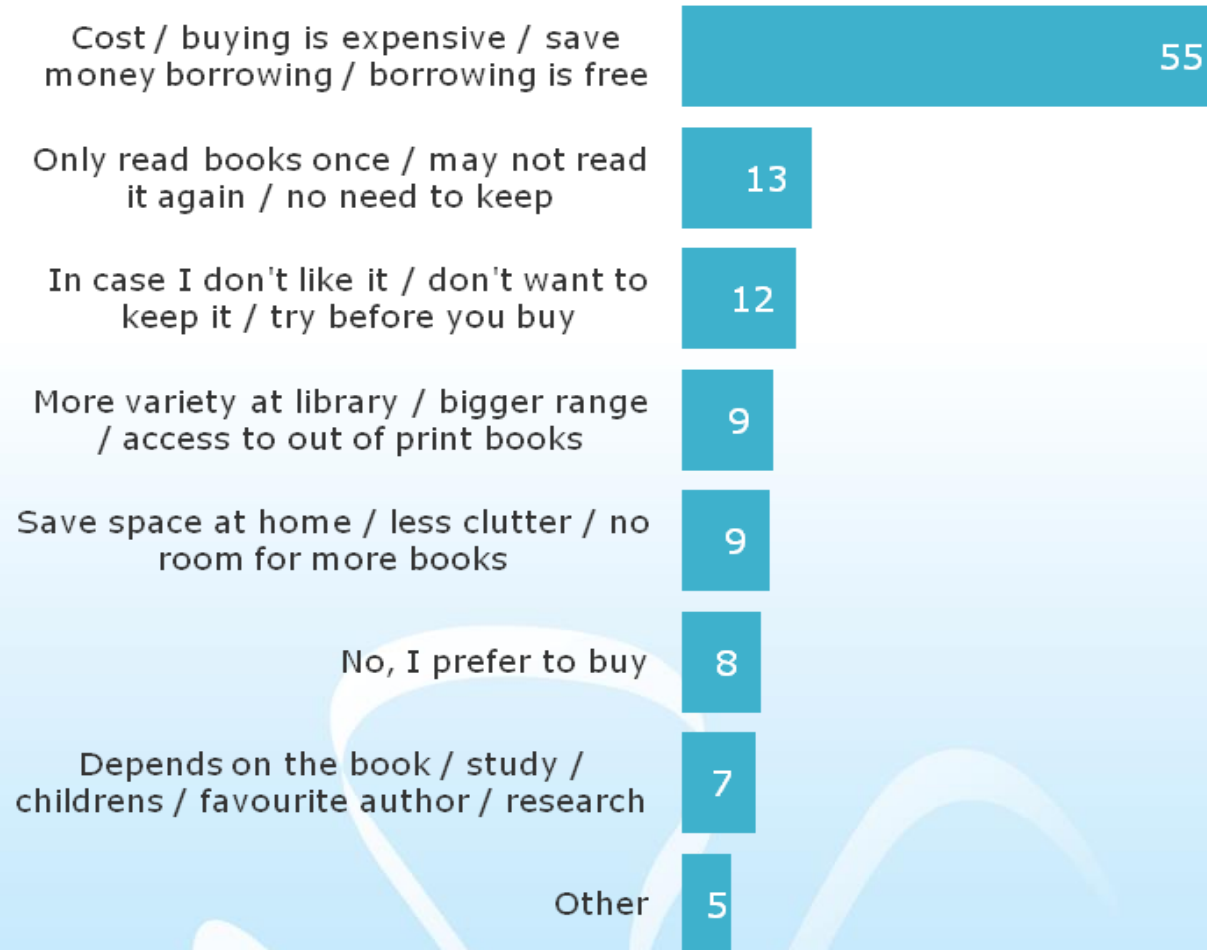
D1 (Q8) Thinking about the books that you buy or borrow from libraries, what proportion of books do you buy and what proportion do you borrow?
Base: Those who have bought a book in the past 12 months and borrowed a BCC book in past 12 months n=313



Why borrow? – cost is a clear driver



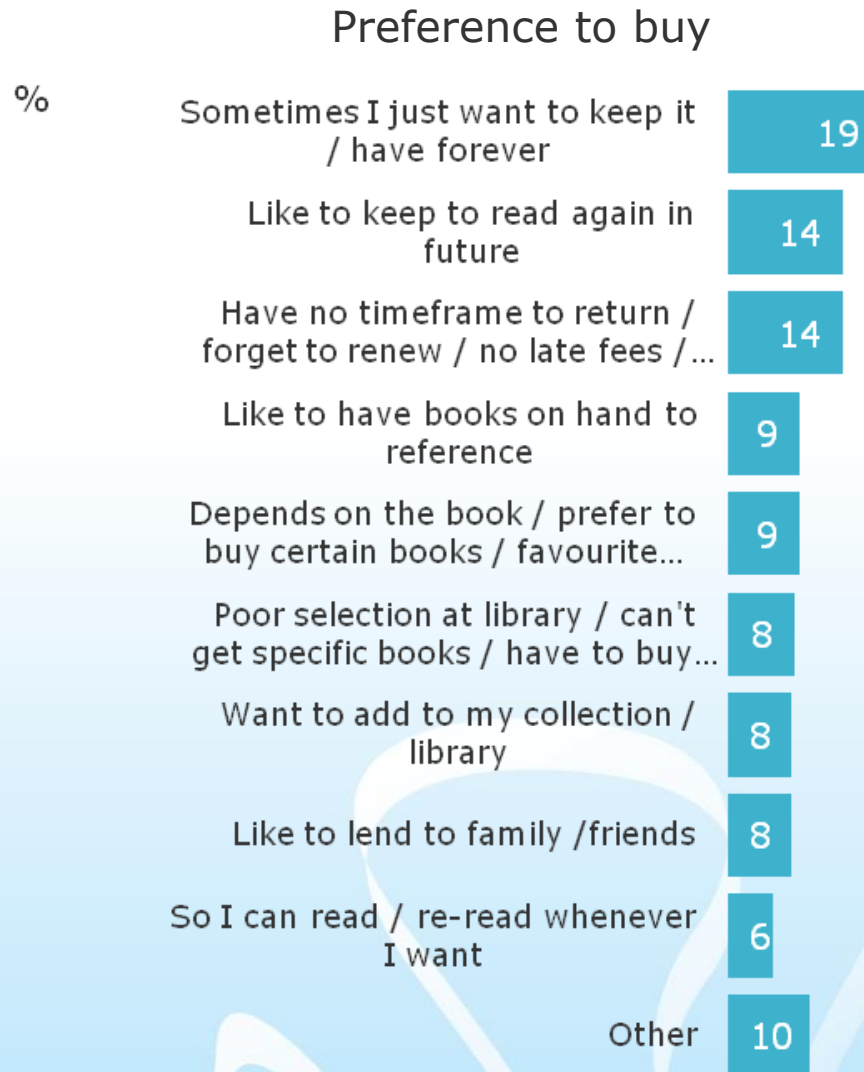
Preference to borrow



D3 Why would you prefer to borrow a book from a library rather than buy?
Base: Total Sample 2012 n=797
Note: Codes <3% are not shown



Why buy? Many reasons involve benefits and convenience of ownership - 'personal library'



D2 Why would you prefer to buy a book rather than borrow from a library?
Base: Total Sample 2012 n=797
Note: Codes <3% are not shown



2

Current perceptions and use of eBooks

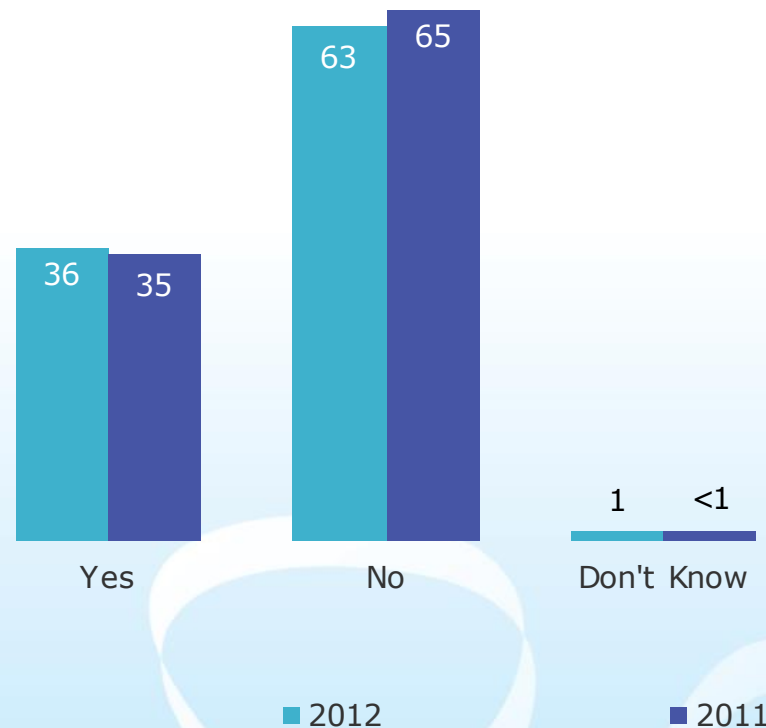
Future intentions of residents



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?

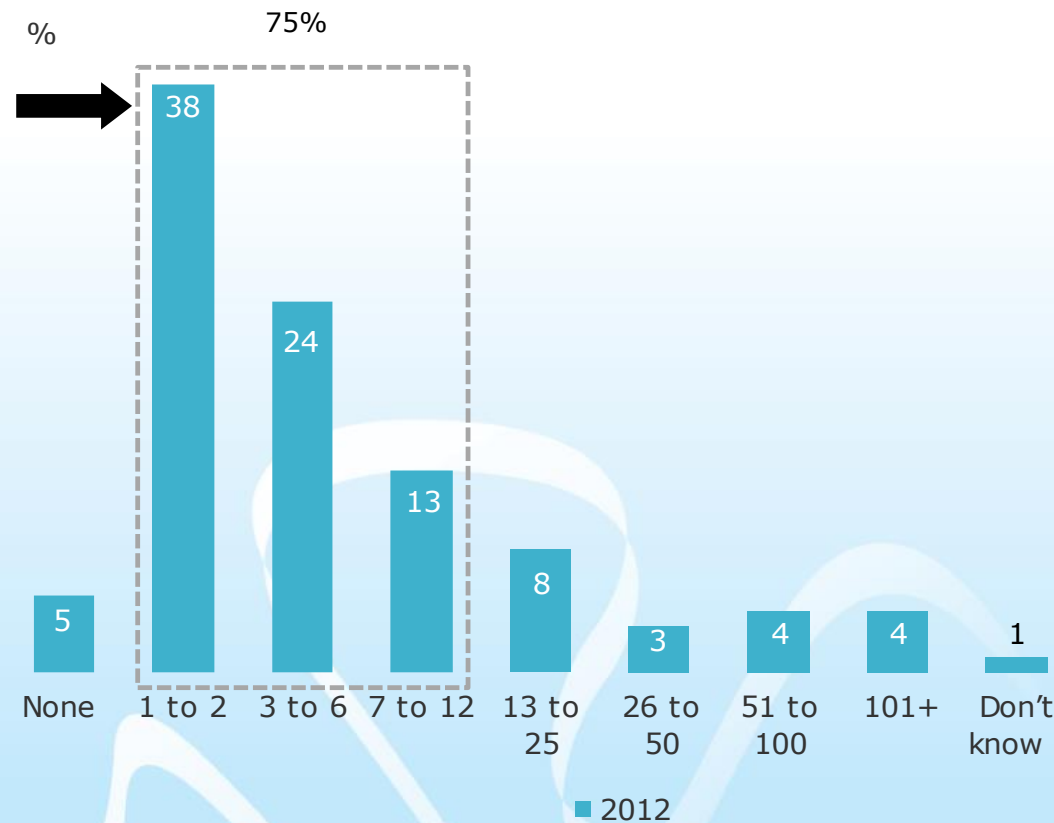
Base: Total Sample 2011 n=309; Total Sample 2012 n=797; Those who download eBooks 2011 n=107; Those who download eBooks 2012 n=296



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Large proportion of eBook readers downloading relatively low volumes

- Of those who have ever downloaded an eBook, three quarters have downloaded 1 – 12 in the last twelve months. Of this group, the majority are likely to download eBooks again in the next twelve months (70%).
- 38% have only downloaded 1-2 books in the past 12 months – ‘dipping their toes in’

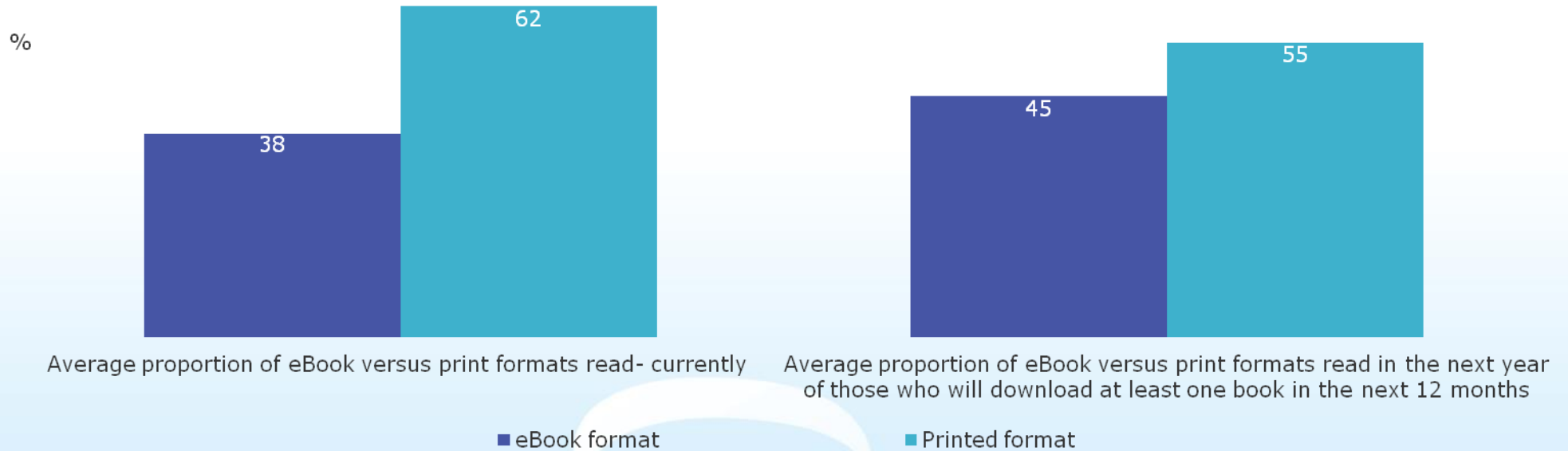
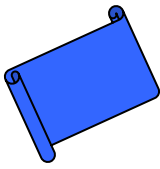


E4 (Q13) How many eBooks have you downloaded in the last 12 months?
Base: Those who download eBooks 2011 n=107; Those who download eBooks 2012 n=296



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eBook readers intended behaviour - next 12 months

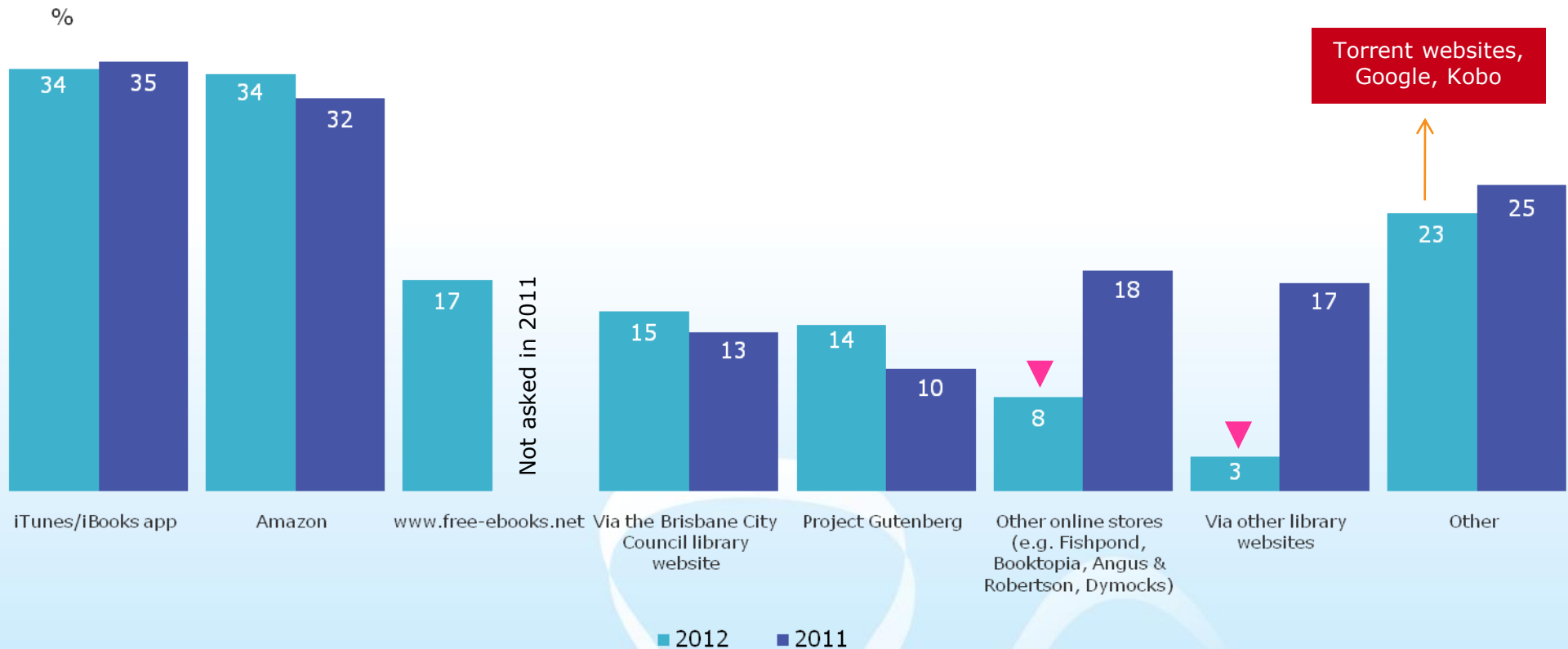
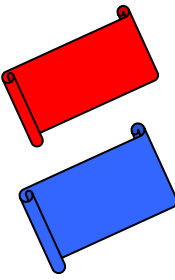


E9 (Q14a) Thinking of the books you have read in the past 12 months, what proportion of books were in print format and what proportion were in eBook format?
E12 This time next year, what proportion of books do you think you will read in print format and what proportion will be in eBook format
Base: Those who have ever downloaded an eBook and will download at least one eBook in the next 12 months n=273



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

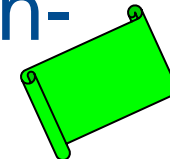


E6 (Q15a) Where do you download eBooks from?
 Base: Those who download eBooks 2011 n=107; Those who download eBooks 2012 n=296; "Via the Brisbane City Council Library website" code 2012 n=192

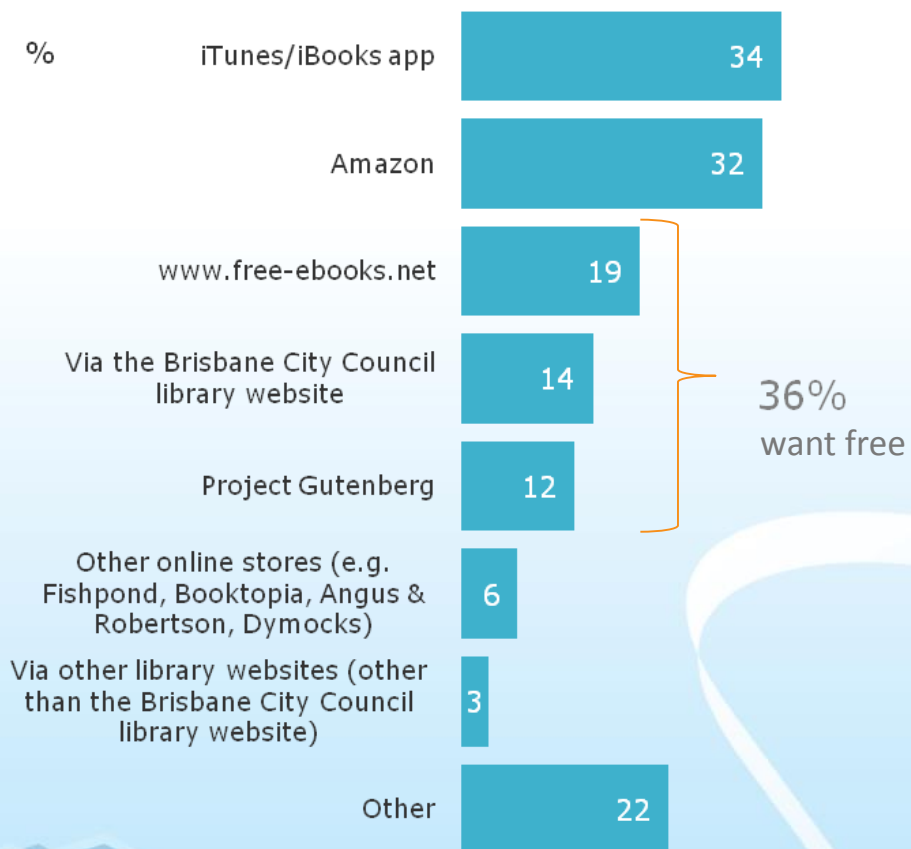


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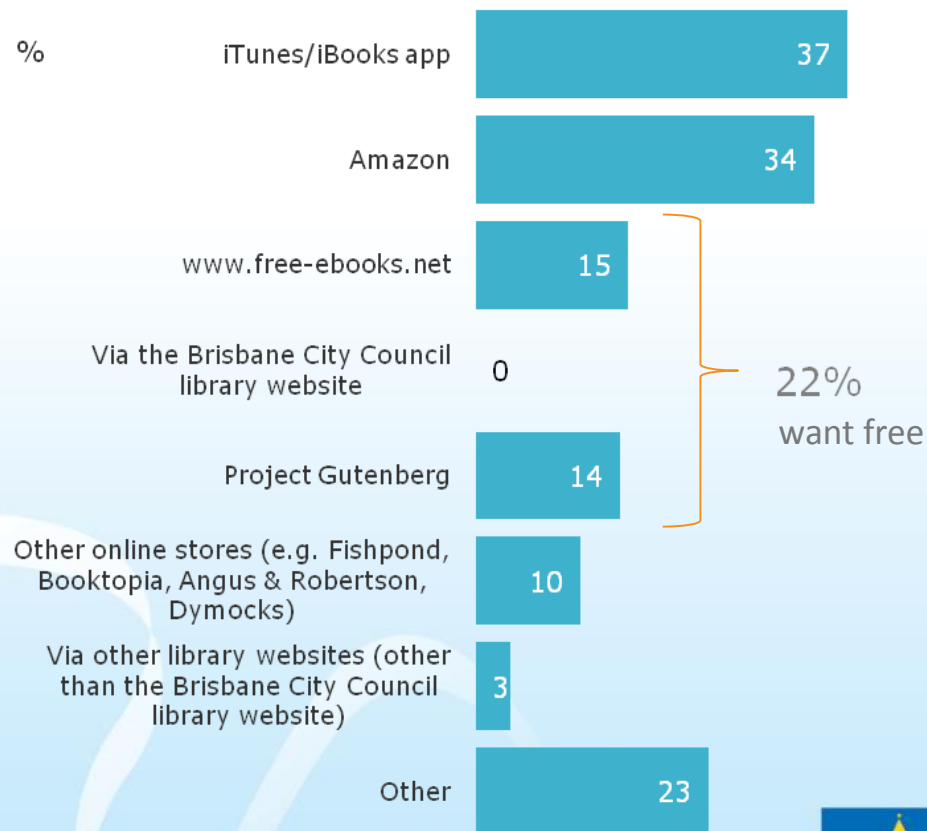
Sources of downloading eBooks – members vs non-members



Council library members



Non Council library members

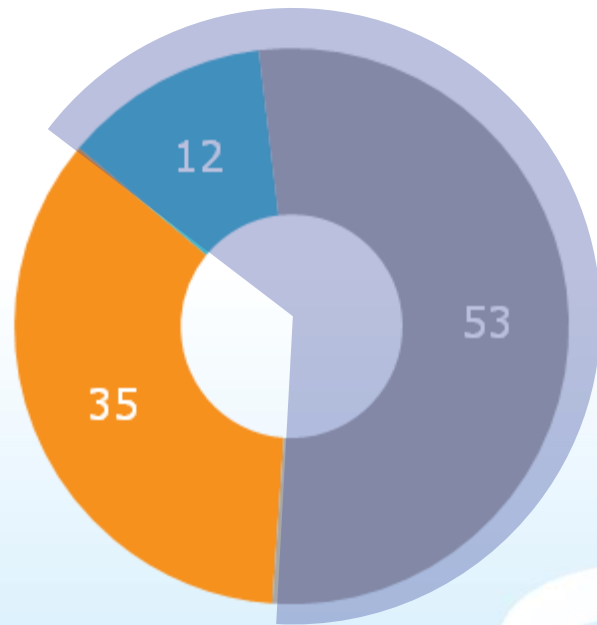
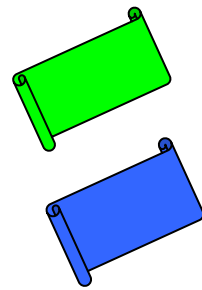


E6 Where do you download eBooks from?

Base: BCC library members who download eBooks n=192; Non-BCC Library members who download eBooks n=96

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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

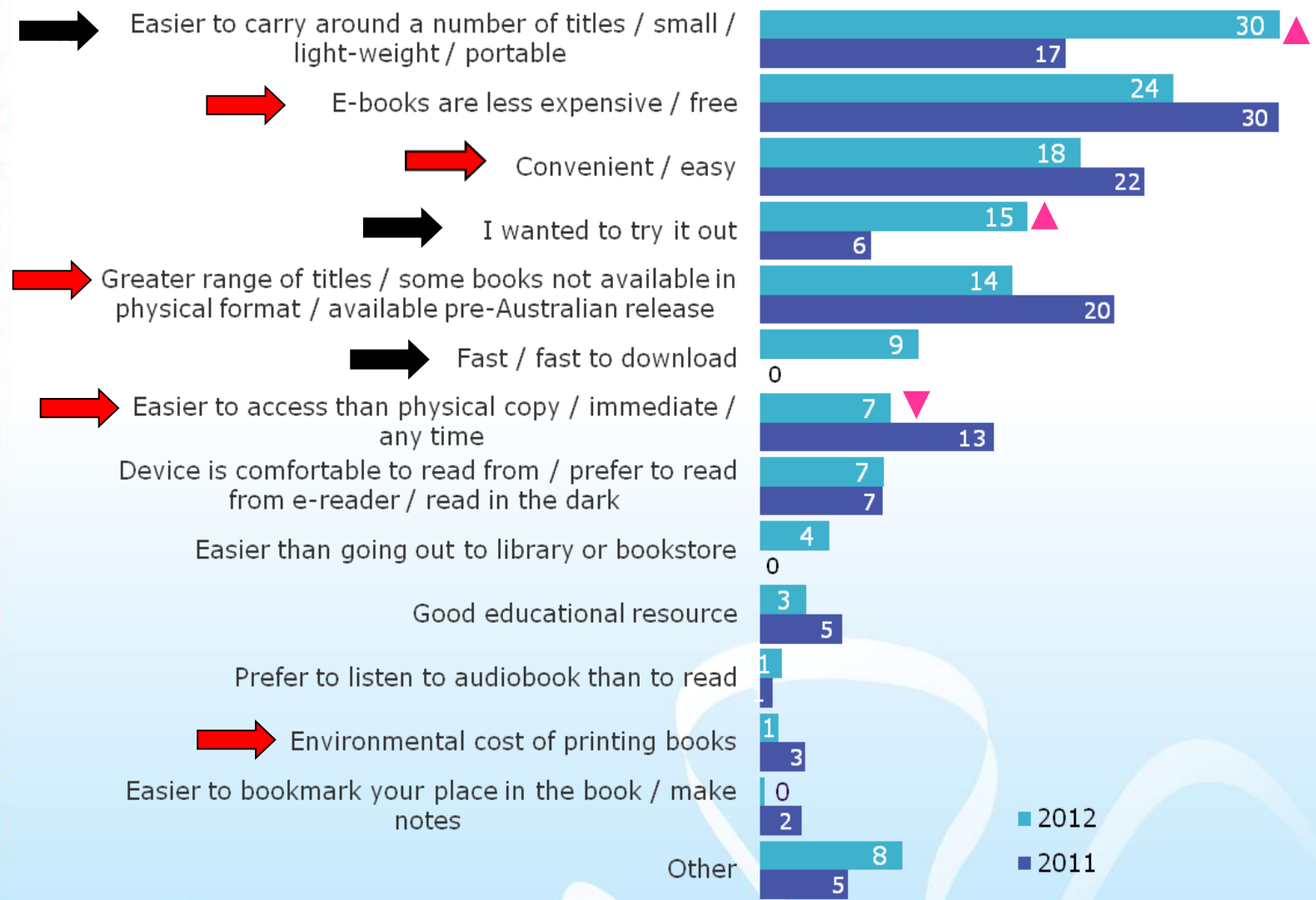
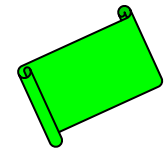
Borrow or download for free = 65%

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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Drivers to downloading eBooks



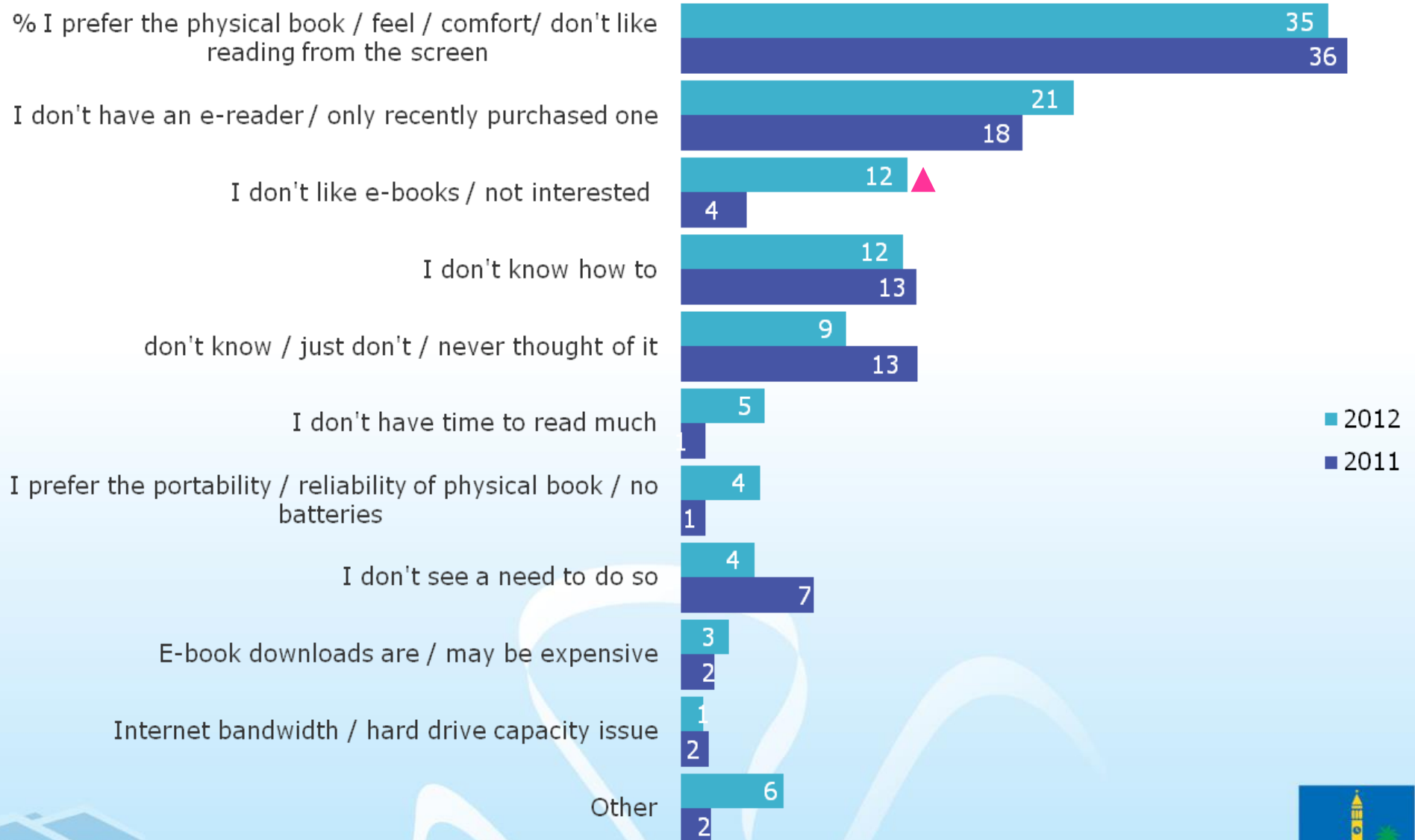
▲ = Significant difference

E10 (Q18) Why do you download eBooks?
 Base: Those who download eBooks 2011 n=201; Those who download eBooks 2012 n=296



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Barriers to downloading eBooks



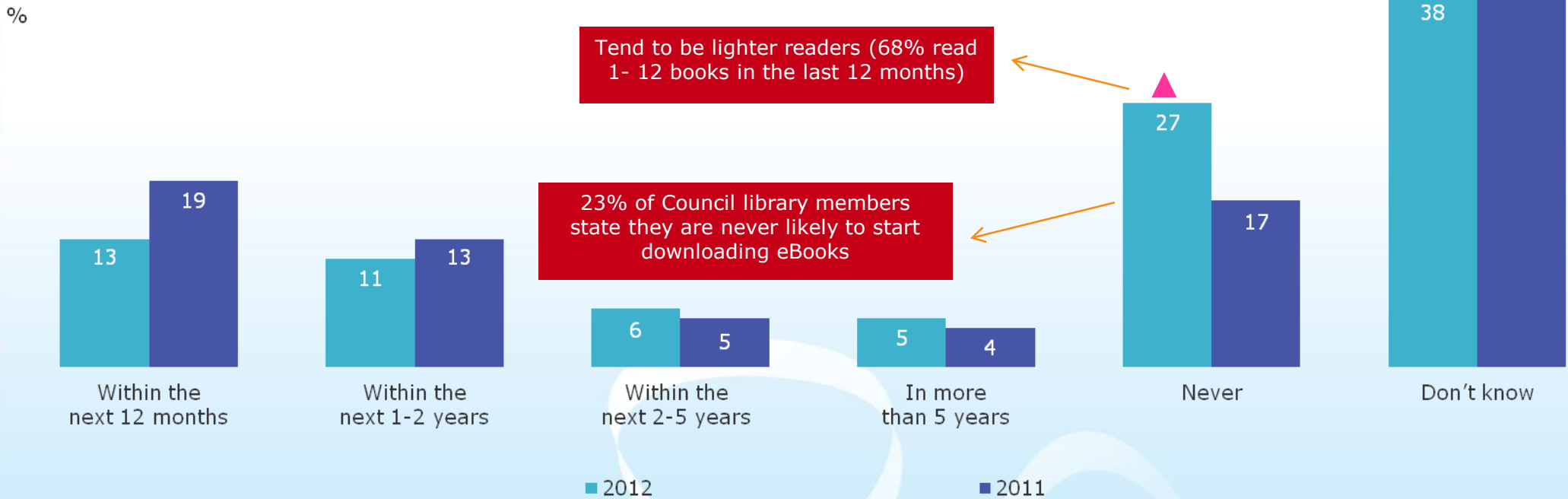
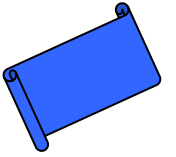
▲ = Significant difference

E2 (Q19) Why don't you download eBooks?
 Base: Those who don't download 2011 n=107; Those who don't download 2012 n=501



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

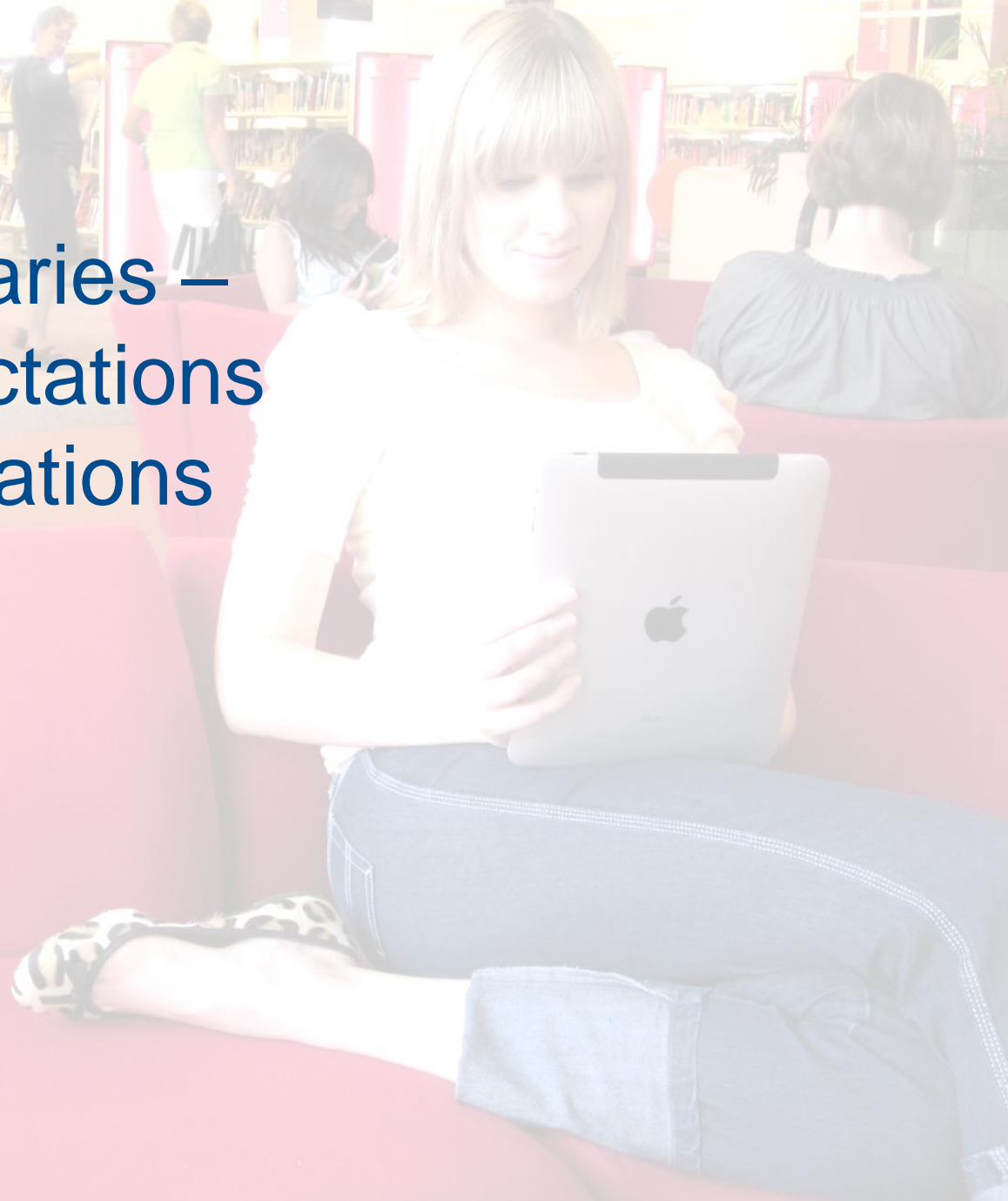


E3 (Q22) When, if ever, do you think you are likely to start downloading eBooks?
 Base: Those who have never downloaded an eBook 2011 n=201; 2012 n=501; Total Sample 2012 n=797

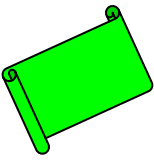


4

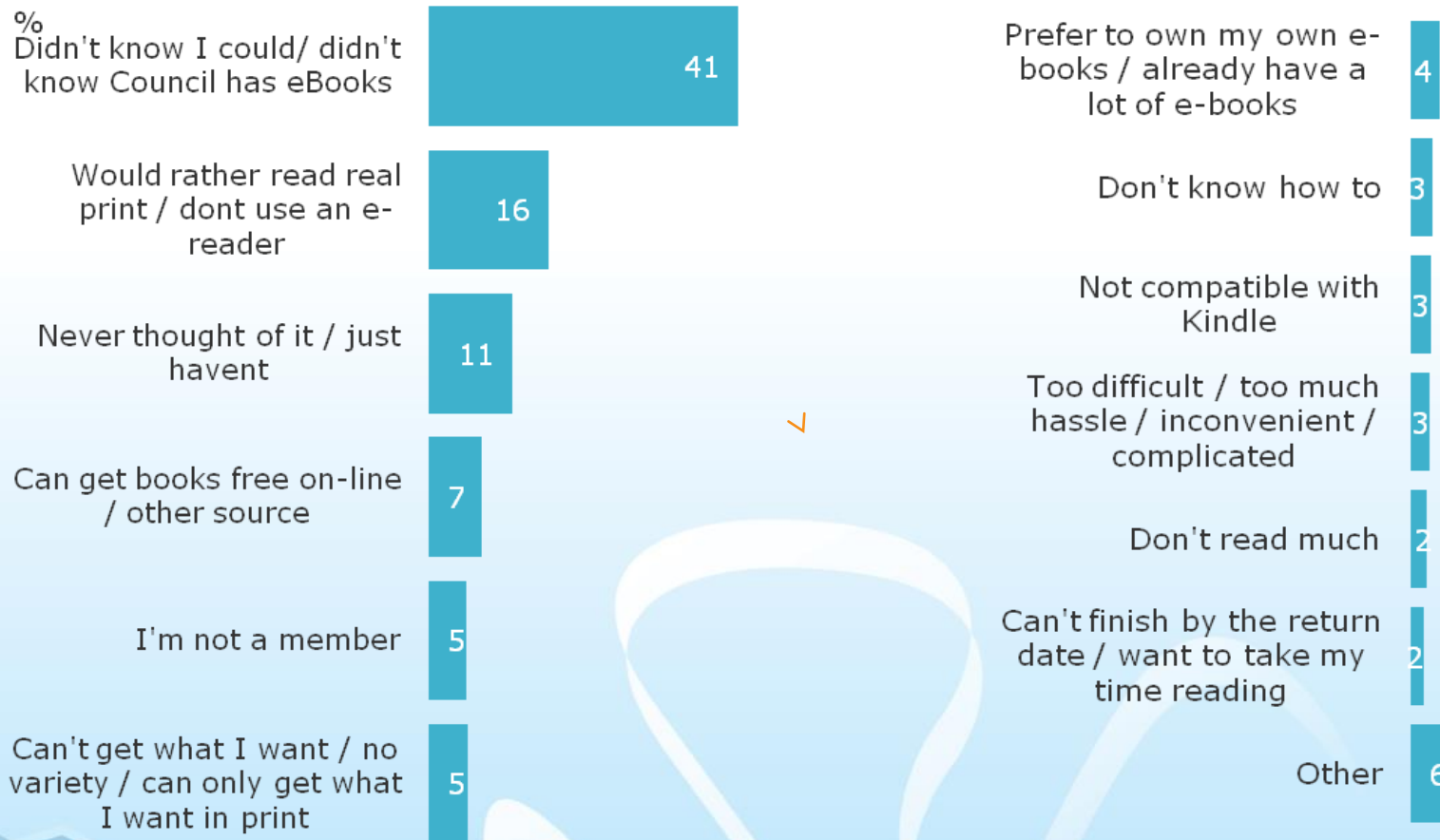
Public libraries – use, expectations and implications



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



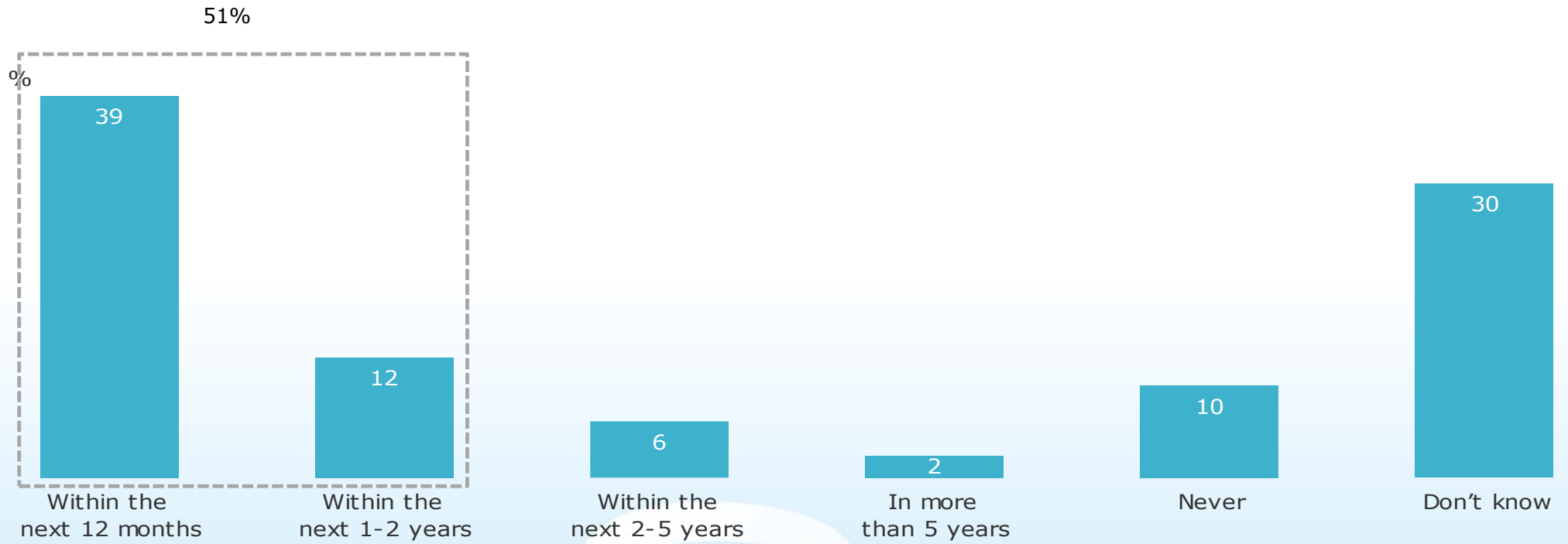
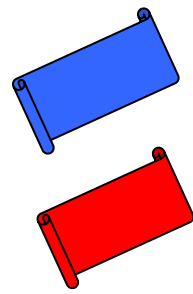
F4 You previously stated that you don't borrow eBooks from Brisbane City Council libraries... Why don't you borrow eBooks from the Brisbane City Council Library website?

Base: Those who have not downloaded/ accessed eBooks from BCC library website n=270



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When do they intend to start?



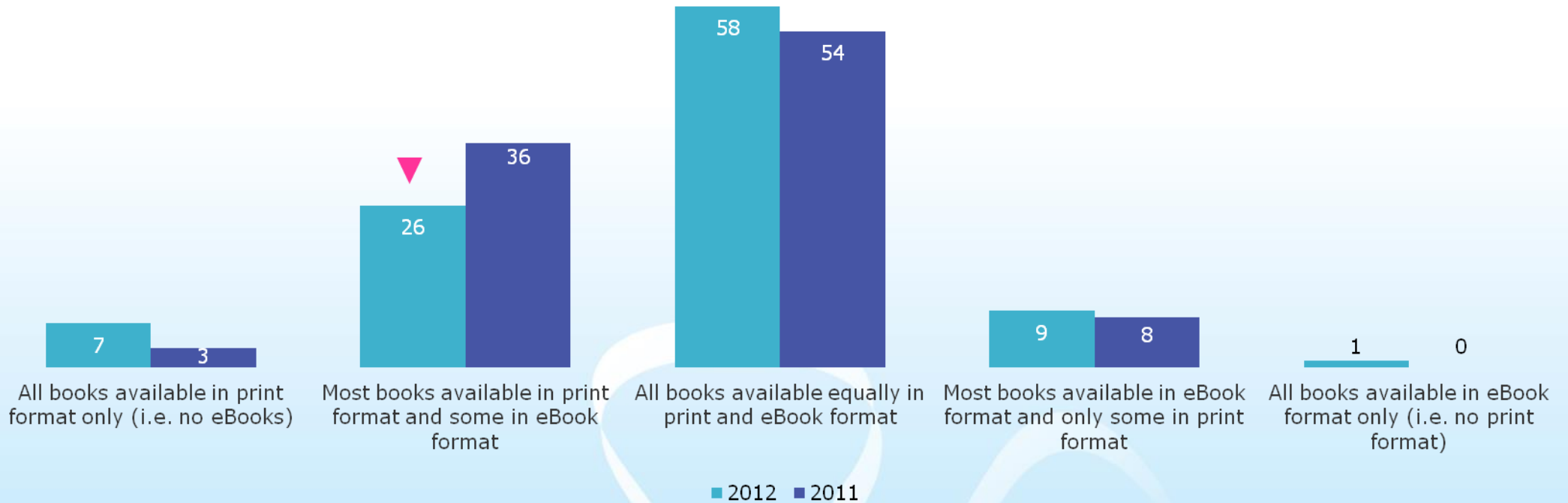
F5 And when, if ever, do you think you are likely to start borrowing eBooks from the Brisbane City Council Library website?
Base: Those who have not downloaded or have not accessed eBooks from BCC library website n=270



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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

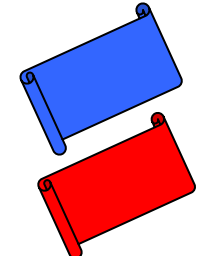
Note: Question wording changed slightly in 2012 from 2011



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BUT – expectations are different

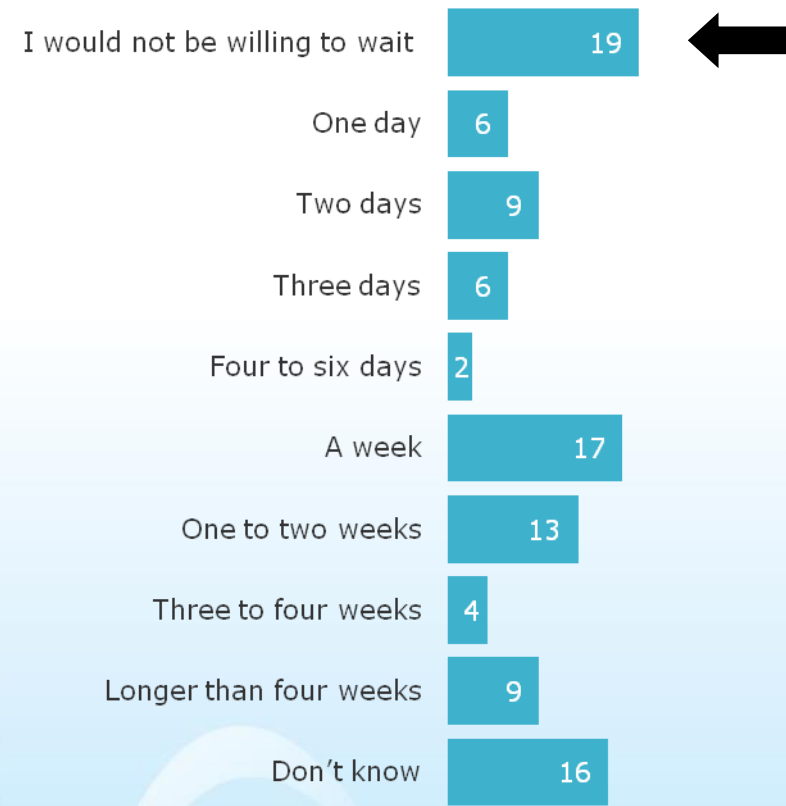
There is less time tolerance for eBooks



Time tolerance to get a printed book



Time tolerance to get an eBook

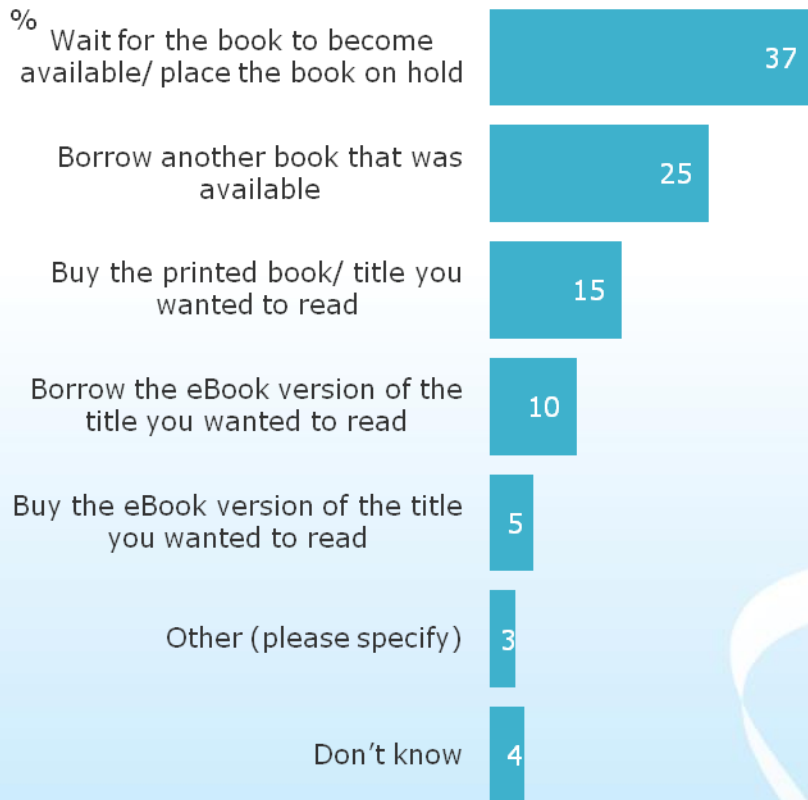


G5 Let's say there was a printed book you wanted to borrow from the library but it was not immediately available. How long would you be willing to wait before you could borrow it?
 G7 Libraries buy a certain number of copies of each eBook title for members to borrow. If you wanted to borrow a specific eBook title and it was not immediately available, how long would you be willing to wait before you could borrow it?
 Base: BCC library members n=490; All BCC library members that have downloaded an eBooks n=192;

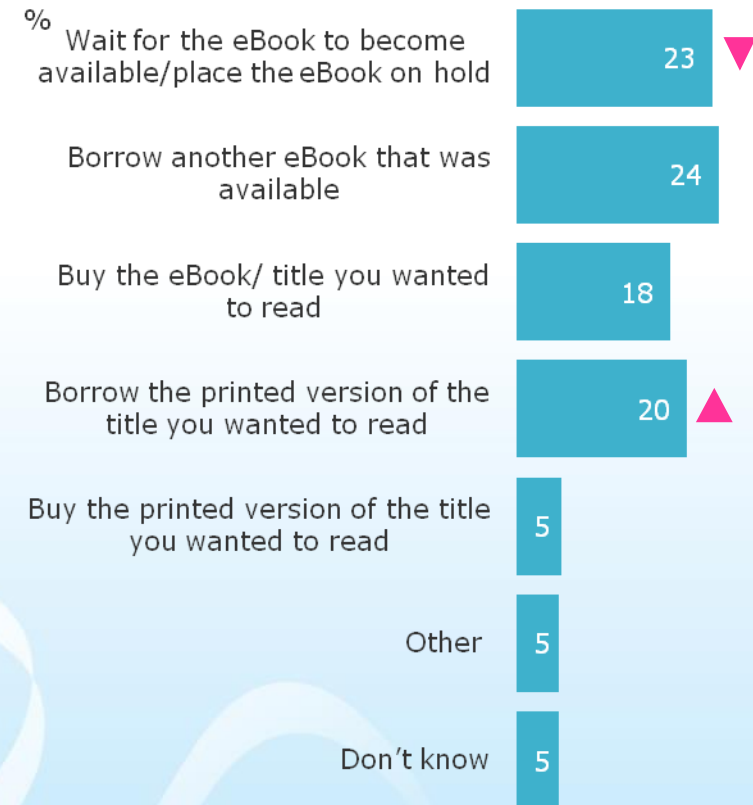


What will customers do if they are not willing to wait?

Next course of action if not willing to wait/ had to wait longer for printed book



Next course of action if not willing to wait/ had to wait longer for eBook



▲ = Significant difference

G6 So if you're not willing to wait for the printed book to become available/ had to wait longer, which of the following best describes what you would do next?

G8 So if you're not willing to wait for the eBook to become available/ had to wait longer, which of the following best describes what you would do next?

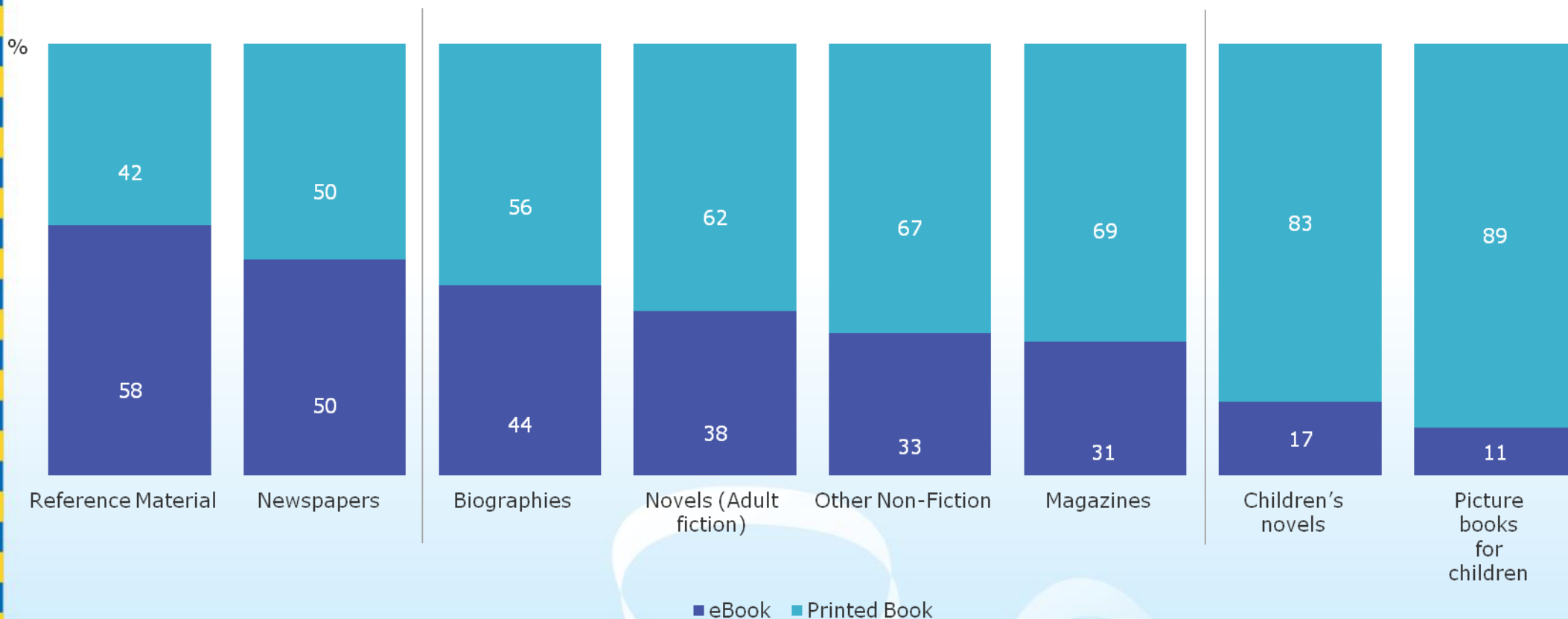
Base: Those who are not willing and willing to wait for a printed book n=471; Those who are not willing and willing to wait for an eBook n=162



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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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In Summary:

- The shift to reading popular materials in eBook format is happening – for some it's a rapid change for others its a slow burn
- One size transition plan won't fit all – while 39% may move to 'e' in next 12 months, 27% say “never”
- Library customers expect eBooks to be free, high quality content, latest titles, easy to access/use and now
- Apple/Amazon dominate the eBook market and set the benchmark
- The Library Service is very powerful in reading discovery
- Library borrowers are also book buyers – 2:1
- 53% of readers are already downloading free eBooks – only 15% borrow from the library – greater awareness is needed
- Selling to libraries is an opportunity for publishers to profit from the massive free eBook reading market (65%)





Thank you to our suppliers



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Changing use of Libraries

Brisbane City Council
Libraries Intercept Survey
2013 Research Report
June 2013

Prepared for: Brisbane City Council
Client Contacts: Fiona Burnett, Alison Hansen
TNS Consultants: Richard Bishop, Catherine Stuart
Job No: 263101573



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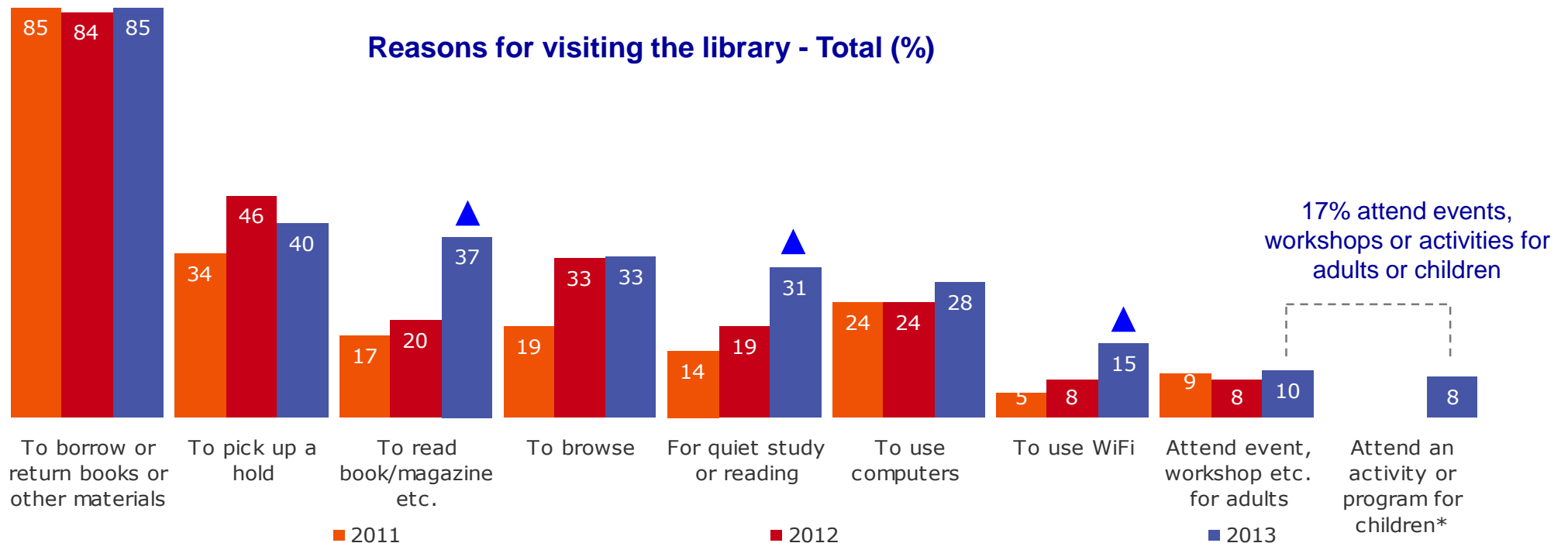
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Libraries – diverse and changing use by the community

- Significant increases in using of the library facility – reading, quiet study and using Wi-Fi
- 17% of customers are attending events, workshops or activities for adults or children



•Q9. For what reasons do you visit this library?

•*Note: New statement for 2013

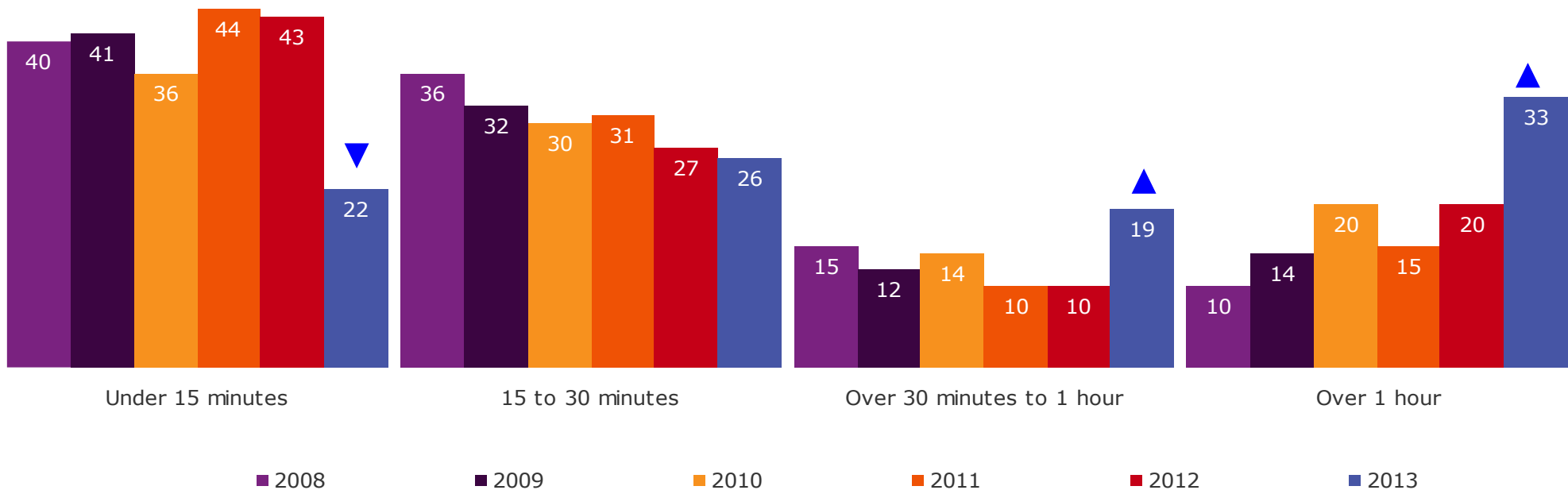
Base: All respondents (n=500) 2013: unweighted data

▲ Positive significant difference 95% - compared with 2012

Libraries – Customers are staying in the library for longer

- Significant increase in use of the library for longer than 1 hour

Time spent in library (% – Minutes)



•Q11. Approximately how long did you stay at the library today?
 •2013 – Over one hour code split out into new codes
 Base: All respondents (n=500)
 2011 – 2013 : unweighted data / 2008 – 2010: weighted data



Positive significant difference 95% - compared with 2012
 Negative significant difference 95% - compared with 2012

Changing use of Library Space: new opportunities!

Future Libraries 2013 Qualitative Research Report

June 2013
Final Report

Prepared for: Brisbane City Council
Client Contacts: Fiona Burnett, Alison Hansen
Council Ref: 2013037

TNS Consultants: Celia Faman, Sue-Anne Holzberger, Richard Bishop
Job No: 263101711



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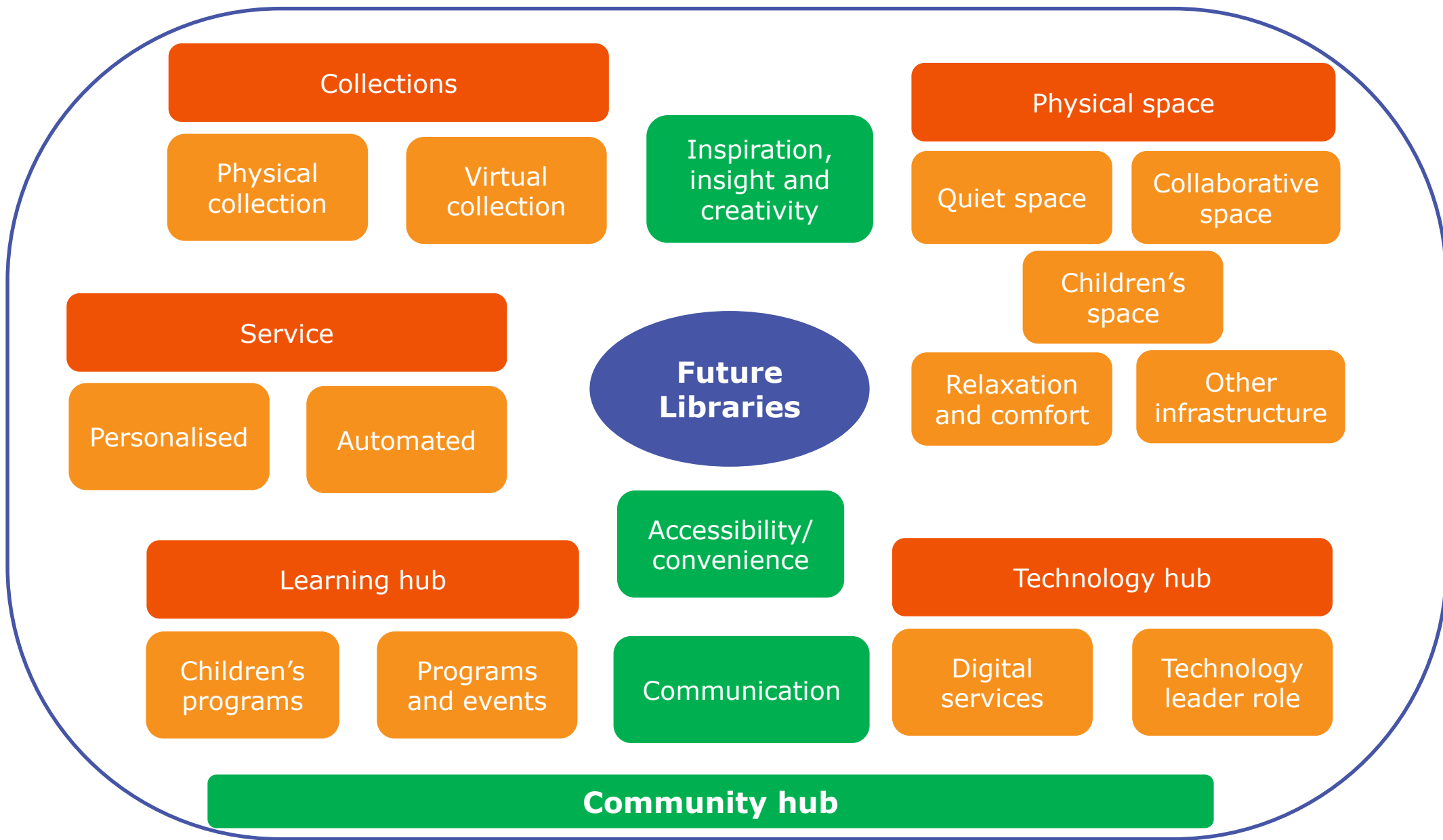
Research methodology (2)

Detailed group/ interview composition

Location	Group	Group Type	Group Composition	IDI	IDI Type
Carindale	1	Older adult users (Baby Boomers)	<ul style="list-style-type: none"> 50-70 years Large library users, regular users, wide range of services 	1	CALD – Paired
Carindale	2	Lapsed/ non users	<ul style="list-style-type: none"> Even mix lapsed/non 	2	Disability
Indooroopilly	3	Adults with young children (pre school age)	<ul style="list-style-type: none"> Medium-large library users, regular users, wide range of services 	3	ATSI – Paired
Ashgrove	4	Older adult users (Baby Boomers)	<ul style="list-style-type: none"> 50-70 years Small-medium library users, occasional users, limited range of services 	4	Disability
Kenmore	5	Adults with primary school children	<ul style="list-style-type: none"> Medium-large library users, occasional users, limited range of services 	5	CALD – Paired
Ashgrove	6	Young adult users (no children)	<ul style="list-style-type: none"> 18-29 years Mix size library users, frequency and range 	6	CALD – Paired

- Mix of suburb, gender and employment status across groups/interviews where relevant.
- Focus groups included a total of 46 participants; In-depth interviews included a total of 10 participants.

Mapping the library of tomorrow



Expectations of the library of tomorrow – key features (1)

Collections

- Balancing the preference for the physical with the transition to the virtual
- Acceptance that technology is driving change – but high value remains strongly placed on tactile book offer and core expectation of libraries in delivering this

Physical collection

- Tactile experience remains preferential and is a critical role for libraries to continue to fill
- Expectation that the range and variety of the collection will endure
- Very good access to latest release materials
- Audio – more range and currency of audio books in the mix, particularly to meet the needs of older users
- Cultural and linguistic materials and resources are important in hard copy
- Children's reading needs to maintain its physical collection – hard copy books remain critical for children's immersion in reading for life – and a driver for library use that is not about digital exposure

Virtual collection

- Range, variety and currency of virtual collection needs to match collections available in the commercial marketplace – give users a reason to use the library for this service over alternatives
 - Currency is particularly important – expectation of recent release virtual collection by nature of a digital resource
 - Most opportunity with young adult users
- Enhanced visibility of virtual collection in the physical library space to inspire discovery – opportunity to enable trial through library access and browsing of virtual collection (as with physical collection)
- Need to address barriers to take-up – downloading issues, eReader queries, etc – to support people to transition
- Potential for increased availability of podcasts for delivering material – extending reach of events
- Downloads start to supercede traditional collections for CDs and audio books

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Ideas to make eBooks visible in the physical library

- Shelf-talkers: strategically positioned – just click through to the eBook
- ‘Virtual bookshelf’ in What’s On in Libraries
- 10 minute ‘pop up’ eBook book talks
- Pull up banners, Bookmarks & Avant Cards with QR codes to click through to eBooks
- Virtual Bookshelf Graphic on our buildings, public transport Adshel



New York Public Library – Underground Library



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Woolworths Bus Shop



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Thank you!

Sharan.Harvey@brisbane.qld.gov.au



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