Analysis of Canadian Content in Ontario Libraries

EBOOK ACQUISITION, LENDING MODELS & DISCOVERABILITY
EBOUND CANADA

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EXECUTIVE SUMMARY

eBOUND Canada commissioned Page Two Strategies to build on a gap analysis report published in 2018. The 2018 report, called "Canadian eBooks in Public Libraries: A Gap Analysis Report on Trends and Issues in eBook Collection Practices" highlighted a "gap" in the availability of eBook formats in Ontario public libraries. That report is available [here](#) on the eBOUND website.

This paper aims to provide insight into eBook acquisition, licensing models and formats, pricing, and opportunities for publishers to maximize discoverability by marketing their titles directly to Ontario libraries. The inquiry for this report was carried out through three instruments of inquiry: a direct survey of Ontario librarians; circulation data culled from reports generated by the main eBook vendor operating in Ontario public libraries (OverDrive); and title data collected from Ontario public library web sites. Key findings include:

- A one copy, one user lending model is preferred by librarians
- Pay-per-use and time-limited lending models are not attractive to librarians
- PDF formats are not at all desirable to library patrons; EPUB is the patron-preferred format
- Ontario public libraries want to work with publishers to experiment with new and different lending models

- Libraries overwhelmingly acquire more fiction than nonfiction. BookNet Canada statistics reveal that this closely mirrors the consumer market. In 2018, BNC's consumer panel reported 53.5% of all unit sales in print and eBook formats were fiction while 34.4% were nonfiction.

- BookNet Canada's 2018 statistics reveal further that eBook sales were heavily weighted towards fiction, covering 22.4% of consumer fiction sales. This compares with 26.2% of unit sales in fiction for physical books and 34% in nonfiction.

- Librarians primarily rely on US-based vendors to identify Canadian content, however, Canadian publishers provide a significant amount of that information as well

- BookNet Canada's Loan Stars program is widely used by Ontario public libraries

- Expected circulation and price affect acquisition of eBooks

INTRODUCTION

License models and terms available to Ontario public libraries have changed little since eBooks began finding their way to patron devices in 2011, a time when eBooks comprised just 1% of overall loans and nearly all e-lending happened on a one copy, one user model. This model allows an eBook to be loaned in a manner that closely resembles print book lending, and continues to be dominant in 2018 and 2019, when eBook lending comprises 10%+ of all public library circulations.

Licensing Models

There are two key components in eBook licensing models: User Access and Lending Term or Limit.

- **User Access** refers to the number of patrons that can access a single eBook copy or digital edition at one time. License models typically provide for either one user (most common) or multi-user access. Multi-user access means that patrons are simultaneously using a single eBook copy.

- **Lending Term or Limit** designates either a circulation- or time-limited term associated with specified user access. A lending term may have a limit of 95 checkouts, for example. Alternatively, a lending term that is designated as perpetual access would have no limit.

Under a User Access model where one copy of an eBook can be checked out by one user at a time, and where a lending term limit is 95 check outs, a library will need to manage renewal. That is, when the 95th check out is reached, a library must acquire a new license and

copy of the eBook title. However, when the lending term limit is designated as perpetual use, a library will not need to manage renewal. That is to say, an unlimited number of checkouts can be made with one user having access to a single copy of the eBook at a time.

These two aspects of digital content licensing models have an inherent impact on the cost of acquiring and lending materials in public libraries. For example, titles acquired under Unlimited Multi-User licenses (meaning an unlimited number of patrons can access one copy of an eBook at the same time) may be priced according to a library's population served, and can therefore be more expensive to acquire than eBooks priced on a model that mimics print lending.

Circulation data gathered from Ontario public libraries for this report revealed the following lending access and term models:

- Access

    One Copy, One User

    One Copy, Multi User (Simultaneous Use)

- Term

    Limited by Number of Checkouts

    Limited by Number of Months

    Limited by Threshold: Earlier Number or Checkouts or Months.

The following table provides examples of eBook licensing models by publisher. A One Copy, One User model with Limited number of Checkouts is generally seen as affordable – HarperCollins sets 26 checkouts with a price point of approximately $40 USD.

User Access	Term	Publishers
One Copy, One User	Limited by Checkouts	HarperCollins
One Copy, One User	Limited by Time	Macmillan, Simon & Schuster
One Copy, One User	No Limit (Perpetual)	Independent Canadian publishers distributed by eBOUND, Penguin Random House, Hachette
One Copy, Multi User	Limited by Time or Checkouts	Orca Books, Disney

Librarians expressed preference for some lending models, and these preferences are detailed further in the Licensing Models and Formats section of this report.

METHODOLOGY

To understand public library eBook acquisition and patron preference within the province of Ontario, eBOUND Canada undertook a three-pronged study of digital content held in Ontario libraries. The inquiry was carried out through three instruments of inquiry: a direct survey of Ontario librarians; circulation data culled from reports generated by the main eBook vendor operating in Ontario public libraries; and title data collected from Ontario public library web sites.

Survey

The primary instrument of inquiry was a survey collecting quantitative and qualitative responses from librarians on questions around eBook acquisition, formats and lending models, as well as pricing and eBook discoverability.

Survey responses were collected from 18 Ontario libraries ranging in size from very small, with a population served of only 11,000, to the largest library system in the country, with a population served of 2.7M. eBOUND ensured that library systems from across the province had the opportunity to respond, and diligently chased responses from northern and eastern communities to ensure representation was not just limited to major urban centres in South-Western Ontario.

Follow-up interviews were conducted by telephone where additional information was required, or clarification could be gained.

Circulation data

A second line of investigation was pursued through circulation statistics drawn from OverDrive. As the primary provider of eBook materials to

public libraries, OverDrive facilitates the extraction of title status and usage reports for individual libraries. Such reports were submitted by Ontario libraries participating in this study.

All libraries responding to the survey were invited to submit OverDrive Title Status and Usage reports, detailing circulation data for two periods: January 1 to December 31, 2017 and January 1 to November 30, 2018, covering a continuous span of 23 months. For this same time period, OverDrive Title Status and Usage reports reflect:

- Titles acquired (January 1, 2017 to November 30, 2018)
- Formats acquired and License models used
- Price
- Checkouts and holds

OverDrive Title Status and Usage Reports were received from 10 survey participants:

Brampton Public Library

Hamilton Public Library

Markham Public Library

Mississauga Public Library

Ottawa Public Library

OverDrive Ontario Library Service Download Centre**

Richmond Hill Public Library

Toronto Public Library

Vaughan Public Library

Whitby Public Library

**Note: Reports from the OverDrive Ontario Library Service Download Centre (OOLSDC) reflect circulation data for 230+ Ontario public libraries. Please see Appendix A for a complete list of Ontario libraries participating in this consortium. Participating libraries have shared access to the OOLSDC eBook collection.

Title data from library websites

Finally, to enable an aggregated view of library holdings beyond what was reflected during the period covered by OverDrive Title Status and Usage reports, eBOUND commissioned the collection of title listings from Ontario public libraries on key library platforms. Data gathered included:

- ISBN, Title, and Publisher
- Genre
- Number of Digital Copies Held
- Number of Holds

Data was collected from the websites of the following library systems, grouped below by platform used:

Proprietary Platform:
Toronto Public Library

BiblioCommons Platform:
Hamilton Public Library
Markham Public Library
Oakville Public Library
Ottawa Public Library
Vaughan Public Library
Whitby Public Library
Windsor Public Library

Encore Platform:
Barrie Public Library
Burlington Public Library
Kitchener Public Library
London Public Library
Milton Public Library

Waterloo Public Library

Polaris Platform:

Brampton Public Library

Guelph Public Library

Sirsi Dynix Platform:

Mississauga Public Library

Oshawa Public Library

Richmond Hill Public Library

St. Catharines Public Library

FINDINGS

Findings are organized in the following key areas, each of which includes relevant survey responses as well as a combined summary of indications from OverDrive circulation data and web site title data:

1/ Profile of Library Respondents
2/ Acquisition of Canadian Digital Content
3/ Licensing Models and Formats
4/ Genre and Discoverability
5/ Marketing

Analysis of the survey responses, circulation data, and title information from library websites yielded:

- An understanding of eBook licensing models and librarian preferences
- Patterns of eBook licensing and purchasing that can help publishers better understand how digital content is acquired by Ontario libraries
- Some insight into the ways in which pricing and circulation affect eBook acquisition
- A comparative view of eBook circulation for fiction and nonfiction titles
- Recommendations for increasing the discoverability of eBook titles published in Canada – both to library collections staff and to library patrons.

Analysis is presented in the form of key take-aways following each section of core findings.

1/ PROFILE OF LIBRARY RESPONDENTS

Association Membership

Answered: 18   Skipped: 0
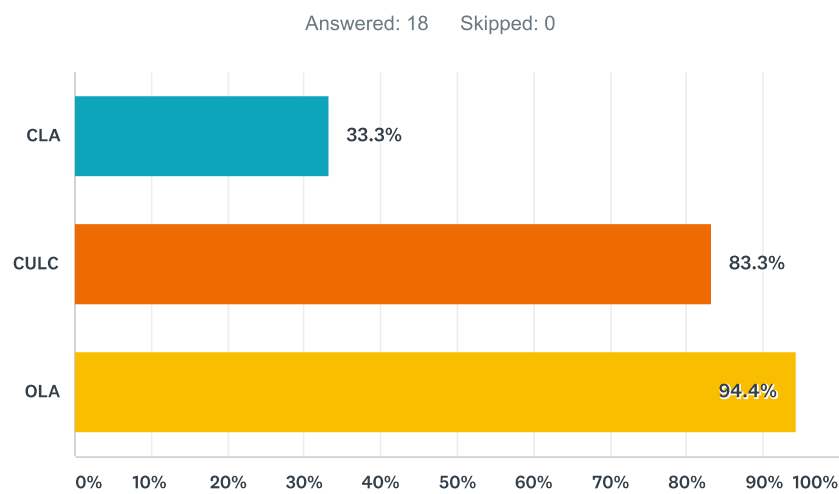
ANSWER CHOICES	RESPONSES	
CLA	33.3%	6
CULC	83.3%	15
OLA	94.4%	17
Total Respondents: 18		

The number of respondent libraries maintaining membership in the Canadian Urban Libraries Council (CULC) nears that of libraries belonging to the Ontario Library Association (OLA), while few are members of the Canadian Library Association (CLA). The significance of CULC among respondent libraries is demonstrated here, and the organization should continue to be recognized as a meaningful partner in eBOUND Canada's efforts to build Canadian publisher partnerships with Ontario libraries.

Access to Shared eBook Collections

Answered: 18   Skipped: 0
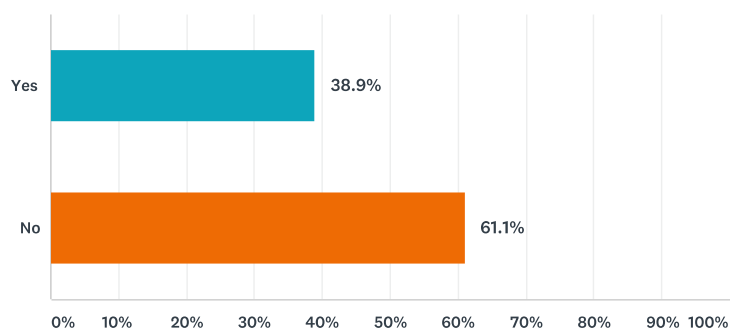
ANSWER CHOICES	RESPONSES	
Yes	38.9%	7
No	61.1%	11
TOTAL		18

Summary of Survey Findings

- Most library survey respondents (61%) are not members of a library consortium, and therefore do not access shared or floating eBook collections. Consortium members are typically regional library systems that collectively benefit from increased access to materials (e.g. eBook collections) and services (e.g. inter-library loan for print titles)
- Survey respondents that are not members of a consortium can broadly be understood as library systems in larger, urban Canadian centres
- Consortium members accessing floating or shared eBook collections can broadly be recognized as libraries in smaller, more rural areas of Ontario
- The average population served among libraries in our Ontario Library eBook survey respondents is 431,131. Note: This figure was ascertained prior to the Ontario Provincial Budget announcements in 2019. The impact of budget cuts to Ontario libraries and patron populations is unknown.
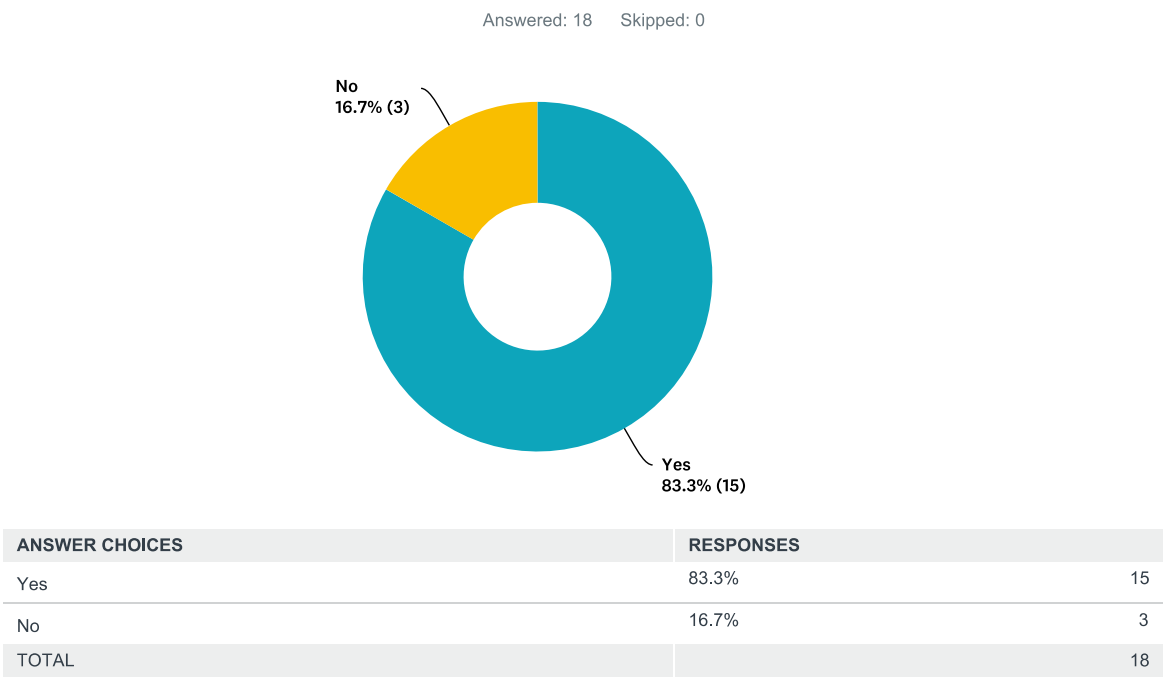
Additional Findings from Circulation and Title Data

OverDrive reports allowed us to identify the number of unique titles acquired by participating libraries from all publishers - both Canadian and multinational - in the reporting period we analyzed.

- The lowest number of unique titles acquired through OverDrive by a participating library was 946

- The highest number of unique titles acquired through OverDrive by a participating library was 22,437

- The Ontario Library Service Centre collection acquired 4,000+ unique titles for its shared collection via OverDrive

- The average number of unique titles acquired was 6,805

- On average, 32.7% of unique titles acquired were fiction titles

- 23.5% of unique titles acquired were nonfiction titles; additional subject category figures are provided on p.23.

2/ ACQUISITION OF CANADIAN DIGITAL CONTENT

Does your library prioritize, or have a mandate to acquire, Canadian digital content?

Answered: 18   Skipped: 0

No
16.7% (3)

Yes
83.3% (15)

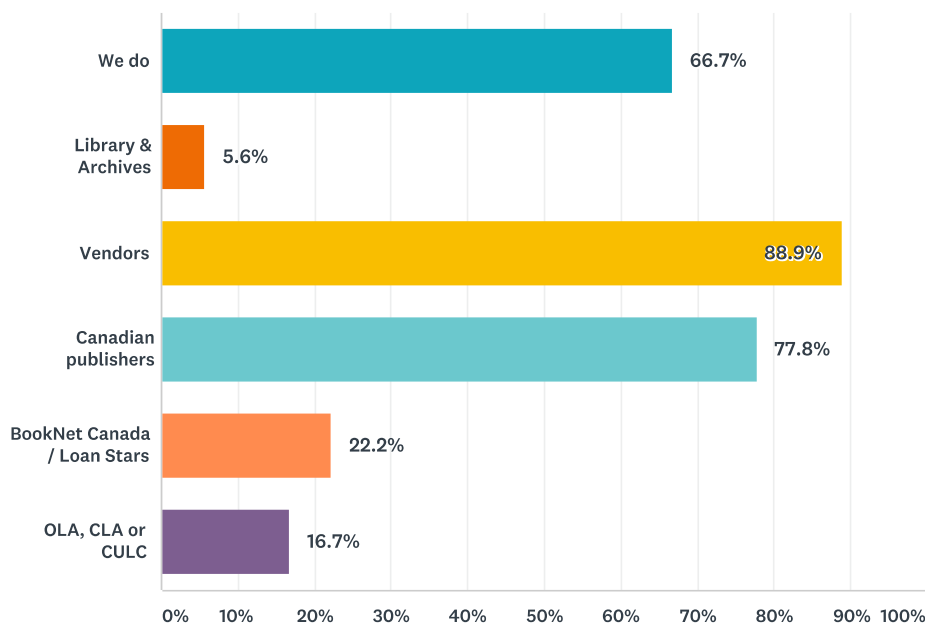| ANSWER CHOICES	RESPONSES	
Yes	83.3%	15
No	16.7%	3
TOTAL		18

Will Canadian digital content be more of a priority in the future?

The majority of librarians responding to our survey (83%) reported actively prioritizing Canadian digital content or having a mandate to acquire it. Nearly half (44%) agreed that acquisition of Canadian digital content will be more of a priority in the future, however, a significant number (33%) remain unsure.

We asked survey respondents who identifies Canadian digital content for their library collections. Here's what they said:

# Who identifies Canadian digital content for your library?

Answered: 18   Skipped: 0

ANSWER CHOICES	RESPONSES	
We do	66.7%	12
Library & Archives	5.6%	1
Vendors	88.9%	16
Canadian publishers	77.8%	14
BookNet Canada / Loan Stars	22.2%	4
OLA, CLA or CULC	16.7%	3
Total Respondents: 18		

Librarians overwhelmingly reported that vendors such as OverDrive, Baker & Taylor and EBSCO identify Canadian digital content for them. While it may be troubling that most vendors working with Ontario public libraries are American owned and operated, and may not identify Canadian content correctly or as comprehensively as possible, it is encouraging to see that Canadian publishers are also listed as a significant resource, with 77.8% of respondents citing them.

When identifying digital content as Canadian within their own library systems, respondent librarians report using the publisher (66.7%) as well as author or contributor name (100%) to do so.

Acquired content is identified as Canadian by:

Answered: 18   Skipped: 0
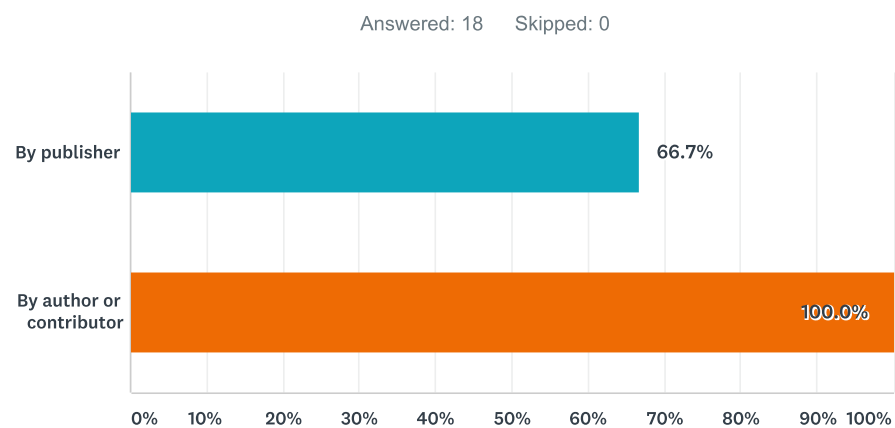
ANSWER CHOICES	RESPONSES	
By publisher	66.7%	12
By author or contributor	100.0%	18
Total Respondents: 18		

Does your library allocate specific budget amounts to both print and digital materials?

Answered: 18   Skipped: 0
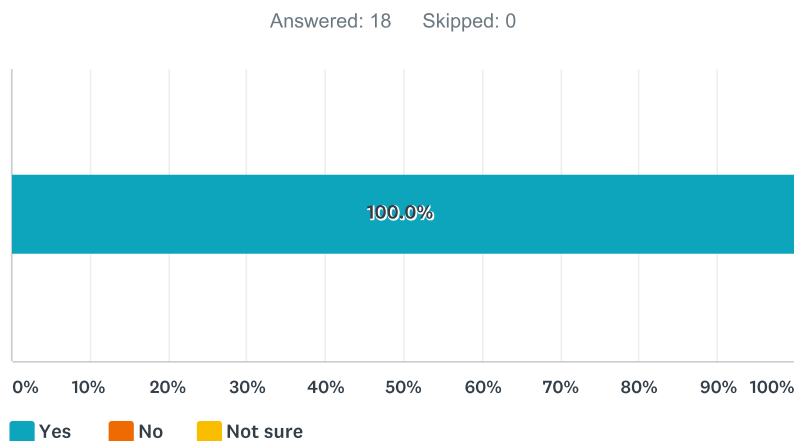
ANSWER CHOICES	RESPONSES	
Yes	100.0%	18
No	0.0%	0
Not sure	0.0%	0
TOTAL		18

This question was presented to librarians with the specific aim of determining the extent to which print and digital materials budgets compete for budget resources within Ontario public libraries. Specifically, we sought to determine if specific budget amounts for both print and digital materials are allocated, or if there is only a single non-specific budget line for all materials.

- 100% of library respondents indicated that they allocate specific budget amounts to both print and digital materials
- Given this response, we can conclude that print and digital materials are not explicitly competing within a single budget line at Ontario public libraries.

Libraries purchase or license digital content from the following vendors (Respondents selected all that apply):

Answered: 18   Skipped: 0
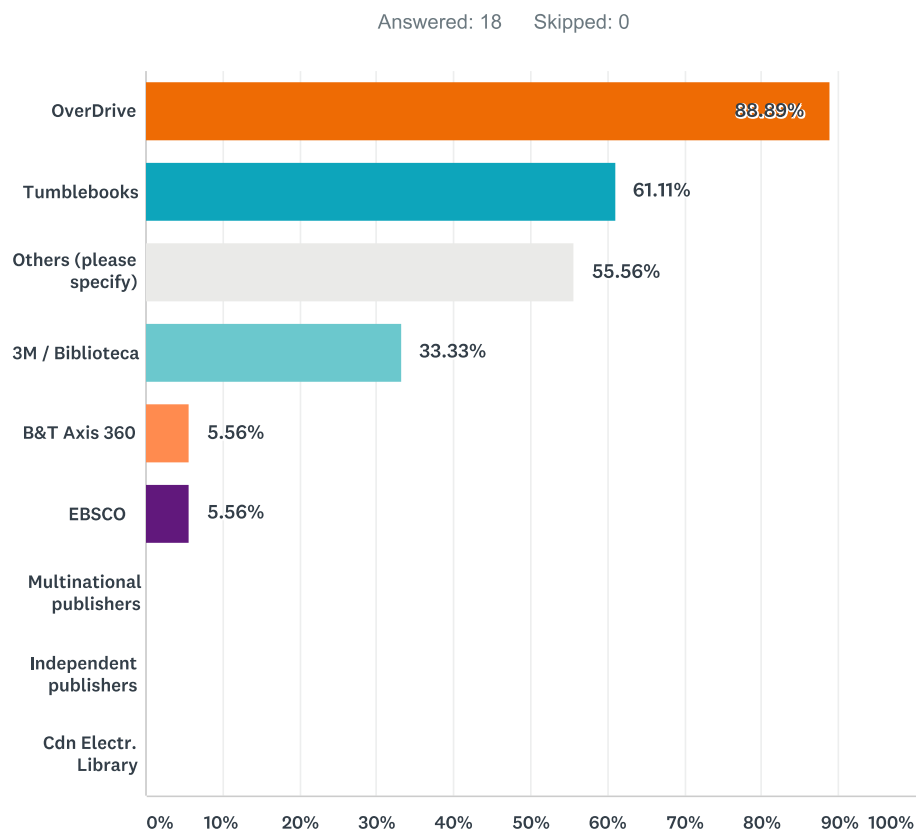
ANSWER CHOICES	RESPONSES	
OverDrive	88.89%	16
Tumblebooks	61.11%	11
Others (please specify)	55.56%	10
3M / Biblioteca	33.33%	6
B&T Axis 360	5.56%	1
EBSCO	5.56%	1
Multinational publishers	0.00%	0
Independent publishers	0.00%	0
Cdn Electr. Library	0.00%	0
Total Respondents: 18		

It will come as no surprise that Ontario public libraries purchase or license digital materials predominantly from the vendor OverDrive. However, it may be surprising to readers of this report that more than half of respondents (61%) report acquiring from Tumblebooks and "Other" vendors (55%).

Tumblebooks is a subscription-based collection of eBooks available to classrooms and public libraries. When answering 'Other', respondents specifically noted these vendors:

- Hoopla
- Archambault
- RBDigital
- Gale Reference Library
- Learning Express
- Naxos Spoken Word Library

The survey results show Baker & Taylor's Axis 360 as a vendor of interest, and reveal the potential for all publishers, both independent and multinational, to sell eBooks directly to Ontario public libraries.

We typically pay vendors in US funds:

Answered: 18   Skipped: 0
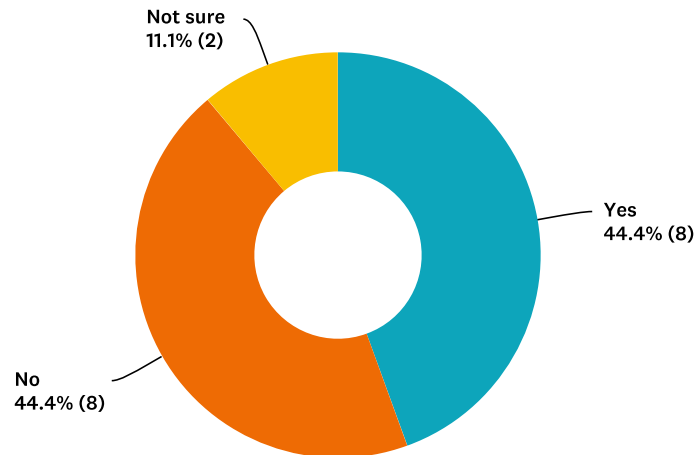
ANSWER CHOICES	RESPONSES	
Yes	44.4%	8
No	44.4%	8
Not sure	11.1%	2
TOTAL		18

Librarians responding to the survey were equally divided between typically paying for materials in US funds (44.4%) and not paying in US funds (44.4%). When answering 'Not sure,' respondents commented:

"very much prefer to pay in Canadian"

"we used to, but OverDrive recently added Canadian funds or US funds on each invoice"

"[US Funds] for OverDrive only. Everyone else is in Canadian"

Acquisition of Fiction vs. Nonfiction Titles

Titles Acquired by Genre
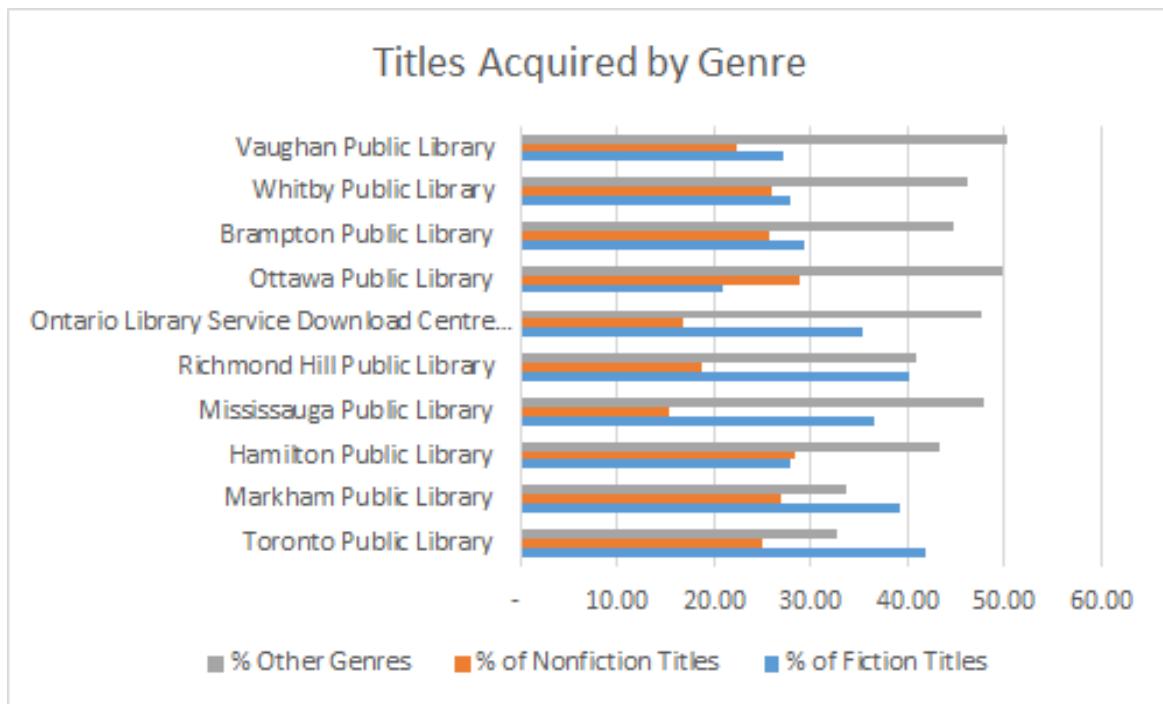
Analysis of circulation data from OverDrive reports provided by Ontario public libraries revealed that Children's and Young Adult genres dominated collections, with many of the libraries reporting that nearly 50% of titles acquired were in these subject categories.

Looking at Fiction vs. Nonfiction titles, we can see that libraries overwhelmingly acquired more fiction than non-fiction for their collections. Librarians responding to the survey acquired between 25 and 40% of titles in the fiction category, with non-fiction factoring in from 15-28%.

Only one library (Ottawa) that provided circulation data acquired more non-fiction than fiction.

Summary of Survey Findings

- 44% of libraries agree that acquisition of Canadian digital content will be more of a priority in the future while 33% were unsure
- Canadian content is identified for libraries by vendors foremost (89%), followed by Canadian publishers (78%), and libraries themselves (67%)
- Both publisher and library associations play a role in identifying Canadian content for libraries, with BookNet Canada ranking higher than CULC
- All libraries allocate specific budgets to digital materials
- Libraries are as likely to pay vendors in US funds as in Canadian funds

Additional Findings from Circulation and Title Data

- On average, 33% of titles acquired by participating libraries during the OverDrive period were classified as Fiction
- 23% of titles were classified as Nonfiction
- 44% of titles fell in other genres (Children's, YA, etc.)
- Ottawa Public Library was the only Ontario library to show a greater number of Nonfiction titles than Fiction titles in its eBook collection.

3/ LICENSING MODELS AND FORMATS

Licensing models for eBooks are outlined in the introduction of this report, but it's worth repeating here that models are typically based on user access and lending term or limit.

Preferred Models

One Copy, One User (especially low cost)

Most librarians surveyed (47%) expressed a preference for a one copy, one user model, particularly when titles are offered at low cost. Low cost was generally articulated by librarians as less than $40.00.

The one copy, one user model is one that most closely resembles print lending in libraries. This model provides dedicated access to or use of an eBook by one patron, and the eBook cannot be accessed by another patron until that access expires at the end of the typical lending term.

This model is attractive to libraries as it allows for a one-time, predictable cost associated with acquiring an eBook. It also allows for some experimentation with materials – lower cost enables librarians to take a risk on titles that may not be featured on current bestseller lists.

Finally, "ownership" of an eBook with a one copy/one user model allows libraries to measure growth of circulation or popularity over time. For example, an eBook acquired on a metered license requires re-purchasing when its time or circulation limit is reached, and any usage associated with expired copies becomes difficult to track or merge with new / additional copies purchased.

House of Anansi and Dundurn Press were specifically cited as Canadian publishers offering eBooks to libraries on a one copy, one user model with attractive pricing.

Simultaneous Use

A significant proportion of librarians (40%) expressed a preference for simultaneous use models, in which one copy of an eBook can be accessed by many patrons at the same time.

This model is attractive to libraries as it allows for instant access to eBook content for patrons, avoiding the dreaded holds queue.

Ebooks acquired on a simultaneous use model may also be purchased on an "ownership" model, as described above in the one copy, one user scenario. Alternatively, the model may have time-limited or usage constraints by number of circulations. While librarians express a desire for more simultaneous use models, they also articulated a distaste for metered access models, which we explain in the following sections. While cost is always an issue, metered access models require an investment from libraries to monitor, evaluate and manage renewals that is not insignificant.

Other Models

13% of librarians surveyed indicated some preference for two additional eBook licensing models. The results were evenly split between models that are low cost, with limited circulations and a model where 52 circulations are available over a 2-year period.

An example of a low cost, limited circulation model would be the 26 checkouts offered by HarperCollins. Under this model, eBooks are metered by the number of checkouts, but are not time-limited as well. The license only needs to be re-purchased by a library when the total number of circulations (26) is reached.

The following survey questions reveal the most common user access models and presence of term limits in Ontario libraries.

The most common access model used by libraries:

Answered: 18   Skipped: 0
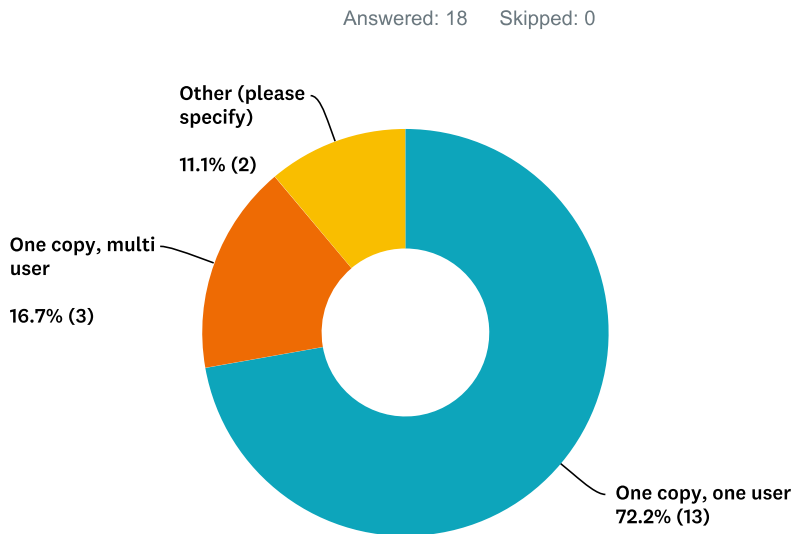
ANSWER CHOICES	RESPONSES	
One copy, one user	72.2%	13
One copy, multi user	16.7%	3
Other (please specify)	11.1%	2
TOTAL		18

When answering 'Other,' respondents specifically mentioned:
- Depends on the vendor. Hoopla is multi-user, OverDrive is one user
- One copy, one user because libraries don't have a lot of choice
  (Note: this accounts for an additional 5.55% added to the one copy, one user response)

Is there a typical, specified term (# of circs or time limit) associated with the most common access model used by libraries?

Answered: 18   Skipped: 0

Not sure
33.3% (6)

Yes
50.0% (9)

No
16.7% (3)
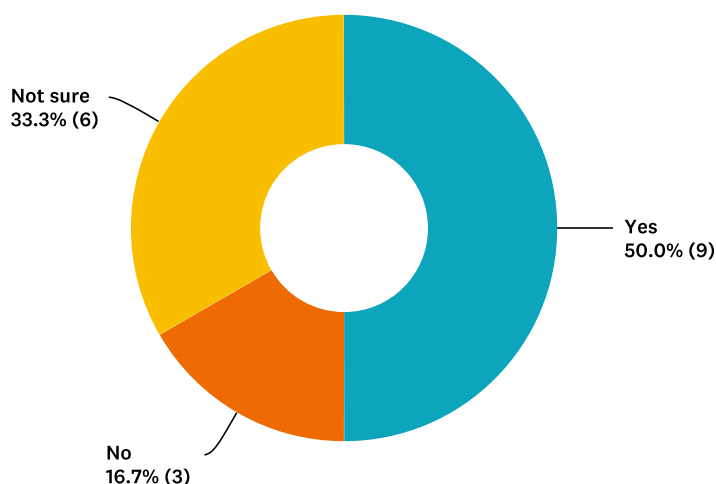
ANSWER CHOICES	RESPONSES	
Yes	50.0%	9
No	16.7%	3
Not sure	33.3%	6
TOTAL		18

Licensing Models Libraries Don't Love

Metered Access

When asked to tell us about licensing models they're not fond of, 47% of librarians surveyed identified eBook models with Metered Access. This means that access to materials is monitored or metered by either time constraints or circulation limits, or both.

Metered access models are generally not favoured by librarians primarily because materials acquired under this model are time consuming to track, resulting in difficulty managing renewals.

Pay Per Use

Pay Per Use licensing models were noted as undesirable by 24% of Ontario librarians surveyed. Under this model, the library pays for each check out, and cost is determined on a per-circulation basis.

Pay per use models are unpredictable for library budgets, which can result in an unwillingness to acquire titles under this model. Libraries can accurately measure and predict the patron population served from year to year, and while the librarians surveyed did not specifically mention it as an alternative to pay per use, it's possible that a price per population model could be considered.

Other Models

20% of librarians surveyed were equally split in their preferences around price and a one copy, one user licensing model. 10% indicated that they prefer not to purchase "expensive" eBooks. Our findings suggest that eBooks priced at more than $40 on a one copy, one user model are considered expensive, and prices above $85 per copy, on the same one copy, one user model can be prohibitive.

Finally, in contrast to most libraries, where a one copy, one user licensing model is preferred, 10% of Ontario libraries surveyed indicated that they do not like it. This model is cited as undesirable as it encourages long holds lists and does not provide patrons with quick or immediate access to materials.

New or Different Models

Experimentation

When asked to tell us about their willingness to experiment with new or different eBook licensing models, more than three quarters (77.8%) of librarians surveyed indicated they 'definitely would' (22.2%) or 'probably would' (55.6%) be willing.

Willingness of libraries to experiment with or try new eBook licensing models:

Answered: 18   Skipped: 0
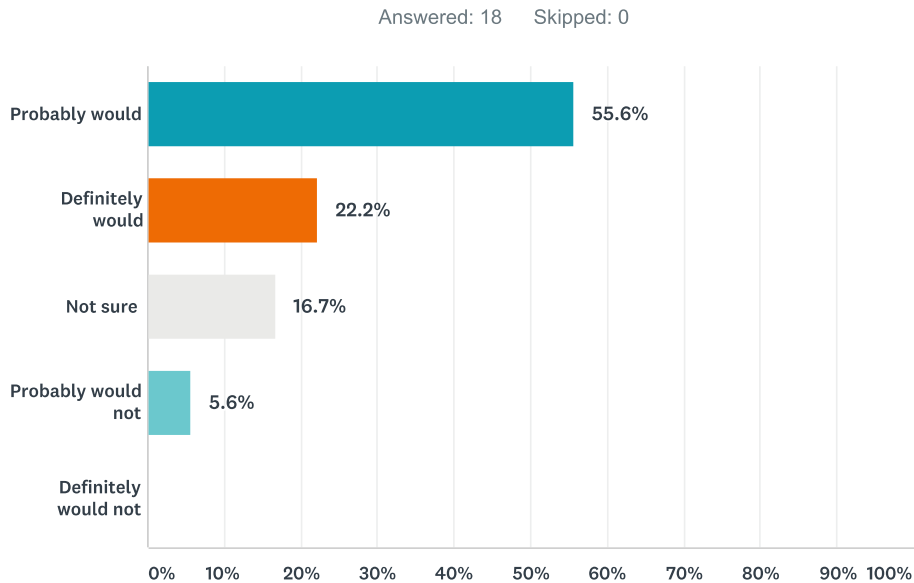
ANSWER CHOICES	RESPONSES	
Probably would	55.6%	10
Definitely would	22.2%	4
Not sure	16.7%	3
Probably would not	5.6%	1
Definitely would not	0.0%	0
TOTAL		18

It is important to note that only 5% of respondents noted that they 'probably would not' be willing to experiment, and zero noted a strong preference against experimentation.

Patron preference by format:

Asked to indicate the preference among library patrons, librarians told us that EPUB is overwhelmingly preferred (83.3%). A small number indicated that Other formats are preferred (16.7%), and absolutely no one recognized patron preference for PDF format.

Answered: 18   Skipped: 0
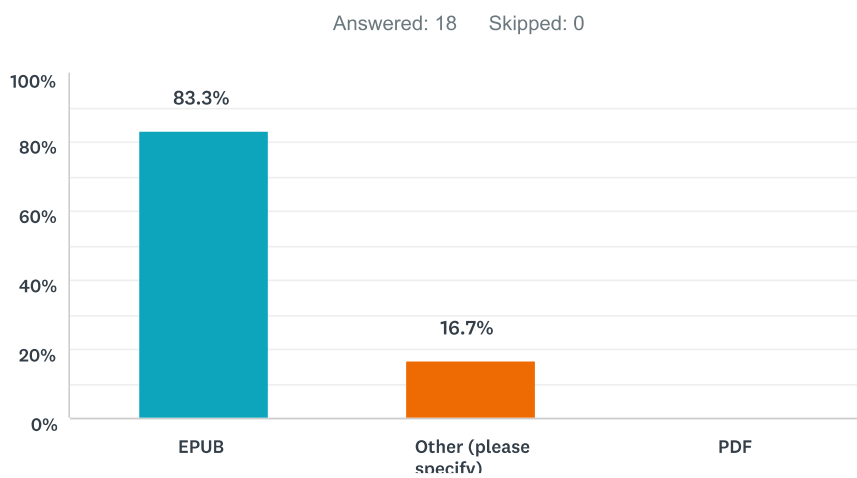
ANSWER CHOICES	RESPONSES	
EPUB	83.3%	15
Other (please specify)	16.7%	3
PDF	0.0%	0
TOTAL		18

When answering 'Other,' respondents specifically mentioned:
- Web-based readers

Summary of Licensing Model and Format Findings

- One copy, one user licenses is the most common access model available in responding Canadian public libraries.
- Simultaneous Use is also popular, though less widely used
- Librarians stay away from pay per use models, and will purchase metered access licenses when digital materials are low cost, often with a low number of circulations (e.g. $40 or less for 26 circs)
- Patrons prefer EPUB to any other format, and tend to dislike PDF.

Additional Findings from Circulation and Title Data

- Circulation data from Ontario libraries reveals the following lending models operating in Ontario public libraries today:

  One copy/One user access models prevail

  A limit of 26 checkouts is the most popular, as it is low cost and therefore attractive for experimentation

Lending Models

- One copy/One user
- Earlier of 52 checkouts or 24 months
- Metered: 24 months
- Metered: 26 checkouts
- Metered: 12 months

4/ DISCOVERABILITY

Our survey asked Ontario librarians how they find out about Canadian eBooks. The results were equally tallied between marketing blasts direct from Canadian publishers (58.8%) and Vendors in the 'Other' category (58.8%). BookNet Canada and 49th Shelf rounded out the responses, with BookNet Canada's Loan Stars program dominating.

Where do libraries find Canadian eBooks? (Select all that apply):

Answered: 17   Skipped: 1
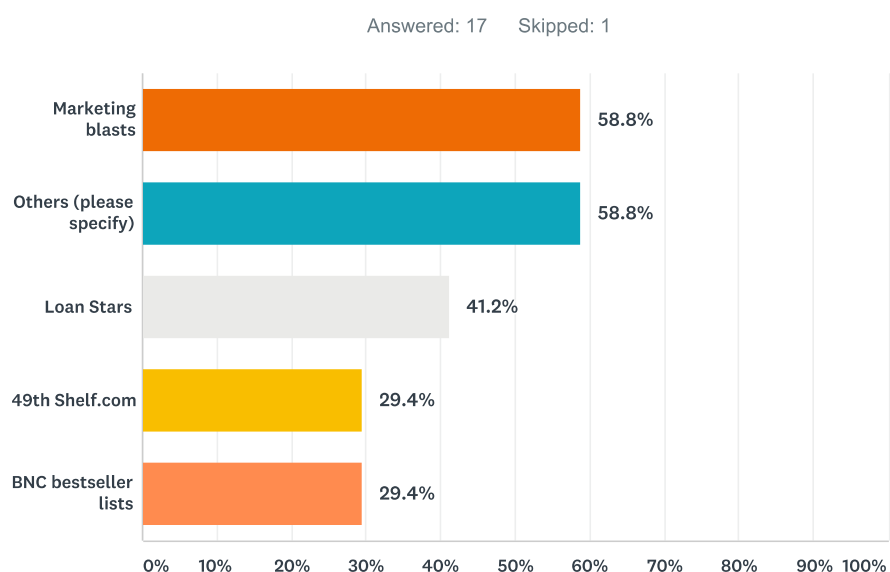
ANSWER CHOICES	RESPONSES	
Marketing blasts	58.8%	10
Others (please specify)	58.8%	10
Loan Stars	41.2%	7
49th Shelf.com	29.4%	5
BNC bestseller lists	29.4%	5
Total Respondents: 17		

When answering 'Other,' respondents specifically mentioned:
● Vendor platforms such as OverDrive, Baker & Taylor's Axis360

Respondent libraries told us the biggest influence on eBook selection is:

Answered: 17   Skipped: 1

ANSWER CHOICES	RESPONSES	
Patron demand	70.6%	12
Bestseller lists	17.6%	3
Other (please specify)	11.8%	2
Genre	0.0%	0
Canadian content	0.0%	0
TOTAL		17
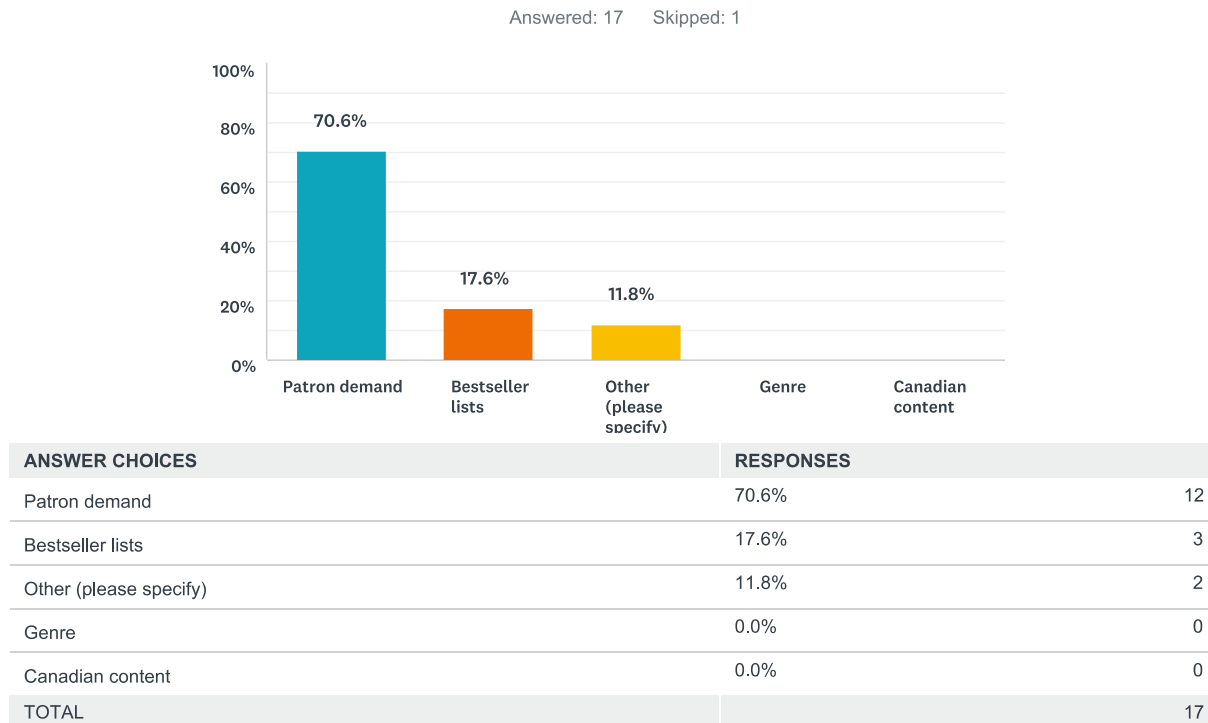
When answering 'Other,' respondents specifically mentioned:

● Budget

Libraries primarily select titles to promote to patrons based on:

Answered: 17   Skipped: 1

Other
23.5% (4)

Bestseller lists
47.1% (8)

Local interest
23.5% (4)

Other local or
national events
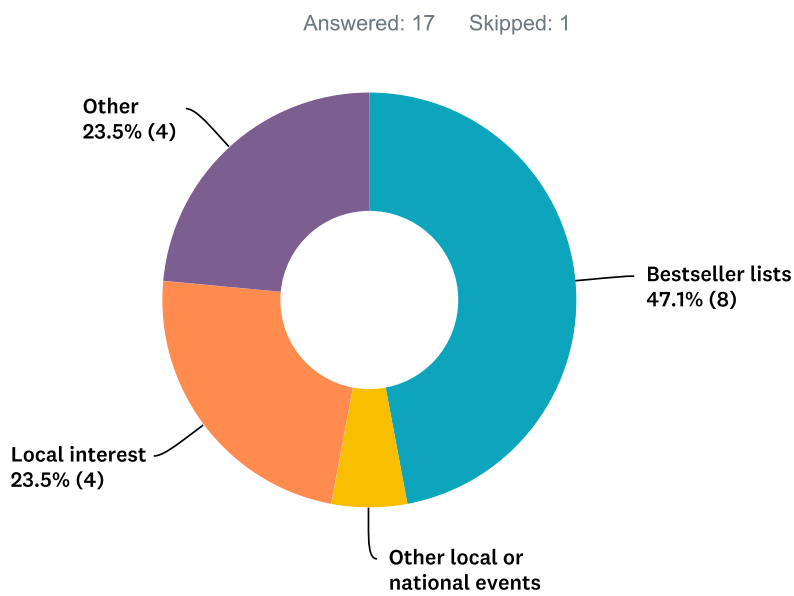
ANSWER CHOICES	RESPONSES	
Bestseller lists	47.1%	8
Events at our library	0.0%	0
Other local or national events	5.9%	1
Media coverage	0.0%	0
Local interest	23.5%	4
Other	23.5%	4
TOTAL		17

When answering 'Other,' respondents specifically noted:

"All of the above"

"Based on sufficient copies available…and past customer interest"

"We review titles from each publishing season and pick the best books to promote. We wrestle over the longlists and select a fresh set of 14 titles every other month…with a double list in summer"

Summary of Survey Findings

- Libraries rely on the media and vendor sites to find Canadian content
- A significant percentage of library respondents use BookNet Canada's Loan Stars (41%) and Sales Data (30%) services for discovery of Canadian content
- Patron demand is the major driver for content acquisition in Ontario libraries
- Bestseller lists are leading the promotion of materials within Ontario libraries

Additional Findings from Circulation and Title Data

- A relatively small percentage of independent Canadian publisher titles are visible among unique eBook titles available in Ontario libraries. Looking at 1,000 titles held by more than half of the libraries submitting circulation data, we can see titles from Dundurn, House of Anansi Press, ECW Press, Arsenal Pulp Press, Nimbus, Biblioasis, Douglas & McIntyre, Second Story Press, Groundwood Books and Freehand Books.

5/ GENRE & MARKETING

Fiction Titles in Ontario Libraries

As highlighted earlier in this report, OverDrive circulation data was used to determine the number of titles acquired by libraries during the reporting period analyzed for this paper. This information is detailed below.

Name	All Titles	Fiction	Nonfiction	% Fiction	% Nonfiction
Vaughan Public Library	948	259	212	27.32	22.36
Whitby Public Library	1,250	349	324	27.92	25.92
Brampton Public Library	3,237	954	833	29.47	25.73
Ottawa Public Library	3,431	723	995	21.07	29.00
Ontario Library Service Download Centre Consortium	4,008	1,422	679	35.48	16.94
Richmond Hill Public Library	4,734	1,909	891	40.33	18.82
Mississauga Public Library	5,452	1,995	843	36.59	15.46
Hamilton Public Library	6,284	1,761	1,791	28.02	28.50
Markham Public Library	16,273	6,385	4,401	39.24	27.04
Toronto Public Library	22,437	9,418	5,648	41.98	25.17
Average	6,805	2,518	1,662	**32.74**	**23.50**

When asked what Canadian publishers can do to increase the discoverability of their titles in Ontario libraries, librarians overwhelmingly (78% of respondents) cited increased and consistent promotion of titles to both libraries and the public.

Specifically, librarians asked for dedicated sections on eBook reseller sites for Canadian eBooks. One librarian articulated the need for a resource that patrons and readers can access by putting it this way,

"Not just a sales area, but a larger area where Canadian libraries can go. Canadian publishers should demand it."

While some vendors, such as OverDrive and CloudLibrary, do feature Canadian publishers and titles, librarians told us there is not enough Canadian content being promoted by the major vendors. Furthermore, when featured, Canadian eBook content is not featured consistently. Libraries cited a focus on titles published in the US, as well as noise from bestsellers, as roadblocks to discovering Canadian content. One librarian, citing exposure to small presses as a challenge, said,

"I know to check Kids Can or Dundurn, but may not know about less established presses."

It was also suggested that librarians would benefit from receiving title-specific marketing materials, such as TIP sheets, for Canadian eBook content, and that libraries will happily collaborate with publishers to host events or programs for new titles.

Some libraries (16%) cited frustration with Canadian content being unavailable or withheld from libraries in eBook format. Lorimer was cited as a specific example of a publisher whose books are not available to libraries in eBook format. Additionally, a lack of French eBook content was recognized. A recommendation was made for publishers to maintain mid- and backlist titles in eBook format, specifically for fiction titles that are part of a series.

Overall, the results of our survey and data collection efforts reveal that Canadian publishers are being asked to participate more fully in marketing eBooks to Ontario Libraries. The data showed us that vendors like OverDrive and CloudLibrary, and programs like BookNet Canada's Loan Stars are important parts of this effort. However, libraries are seeking a more direct relationship with publishers, and while eBOUND and CULC have worked together for some time on this front, some additional efforts may be helpful. We have recommended ways that Canadian publishers can work with Ontario libraries, in the following section.

RECOMMENDATIONS

Using the survey and follow-up telephone interviews, we asked Ontario librarians to suggest three ways Canadian publishers can work with public libraries in the province. The results were clear – librarians suggested fair pricing, consultation on lending models and terms, and streamlined availability of eBook releases.

1/ Price Fairly

The overwhelming perception by librarians is that eBooks are priced steeply for Ontario libraries, and this leads to a conflict between which materials libraries would like to acquire, and what budgets allow. One librarian put it this way,

"With digital costing so much more than print, publishers are asking libraries to choose between one format or the other in many cases."

Librarians did speak of continuing to foster a dialogue with Canadian publishers so that pricing is fair and transparent. Another point of friction recognized by libraries is the supply chain for eBooks, which is dominated by a small number of larger players, and vastly different from the supply chain for print books. Unlike with print purchasing, libraries have only a few options for purchasing and are subsequently unable to shop around for the best prices and volume discounts.

Moreover, it's worth stating again that a perpetual eBook license, priced at $40 Canadian is far more likely to be purchased than a higher priced, metered eBook license with limited time and/or circulations.

2/ Consult with Libraries on Lending Models

Librarians specifically asked for unified lending models, telling us that it's simply too time-consuming to monitor and manage the myriad of lending terms at play in the eBook landscape.

A one copy, one user model was preferred, though there is some call for simultaneous access or a blended model, perhaps – if possible – where simultaneous access is provided for a period immediately after release, followed by one copy, one user access in perpetuity.

3/ Offer Simultaneous Release of eBooks to Retail and Library Markets

Librarians cited confusion around the availability of Canadian eBooks, and told us that when an eBook is not available through vendors, it's difficult to know whether the content is missing, whether the publisher has not released the title in eBook format, or if the content is being withheld.

To address this, Canadian publishers should strongly consider bringing release dates for Canadian digital content in line with releases to retail and consumers. One librarian, aware of some reluctance to do this, noted,

> *"Libraries are not in competition with publishers for readers, but in fact help readers discover new authors, whose books they often subsequently purchase."*

At the time of publication, support and funding for Ontario libraries is under intense scrutiny, with funding for the Southern Ontario Library Service (SOLS) and Norther Ontario Library Service (NOLS) receiving drastic cuts. While budget cuts will certainly affect purchasing and acquisition, the opportunities for Canadian publishers and Ontario libraries to work together are not diminished. Putting more Canadian eBooks in front of patron readers remains a shared goal.

APPENDIX A

Ontario Library Service Download Centre Libraries

OverDrive Title Status and Usage Reports from the Ontario Library Service Download

Centre reflect aggregated circulation data for the following Ontario public libraries:

Addington Highlands Public Library
Admaston-Bromley Public Library
Alderville First Nation Public Library
Alnwick/Haldimand Public Library
Argyle Community Library
Arnprior Public Library
Asphodel-Norwood Public Library
Assiginack Public Library
Athens Public Library
Atikameksheng Kendaasii-Gamik Library
Atikokan Public Library
Augusta Township Public Library
Aundeck Omni Kaning First Nation Public Library
Aurora Public Library
Bancroft Public Library
Baysville Public Library
Beausoleil First Nation Public Library
Belleville Public Library
Bibliothèque publique de Clarence-Rockland
Bibliothèques publique du canton d'Alfred Plantagenet
Big Grassy Public Library
Billings Township Public Library
Bkejwanong First Nation Public Library
Black River-Matheson Public Library
Blind River Public Library
Blue Mountains Public Library
Bonfield Public Library
Bonnechere Union Public Library
Bracebridge Public Library
Brighton Public Library
Brock Township Public Library
Brockville Public Library
Bruce County Public Library
Bruce Mines & Plummer Additional Union Public Library
Burk's Falls Public Library
Caledon Public Library
Callander Public Library
Carleton Place Public Library
Carlow/Mayo Public Library

Cavan Monaghan Libraries
Central Manitoulin Public Libraries
Madoc Public Library (Madoc)
Champlain Township Public Library
Chapleau Public Library
Chatham-Kent Public Library
Chippewas of Georgina Island First Nation Public
Library
Chippewas of Kettle & Stony Point First Nation Public
Library
Chippewas of Rama First Nation Public Library
Clarington Public Library
Cobalt Public Library
Cobourg Public Library
Cochrane Public Library
Cornwall Public Library
Cramahe Township Public Library
Curve Lake First Nation Public Library
Deep River Public Library
Deseronto Public Library
Dorion Public Library
Douro-Dummer Public Library
Dryden Public Library
Dubreuilville Public Library
Dwight Public Library
Ear Falls Public Library
Earlton Public Library (Armstrong Twp.)
East Ferris Public Library
East Gwillimbury Public Library
Edwardsburgh Cardinal Public Library
Elgin County Library
Elizabethtown-Kitley Township Public Library
Elliot Lake Public Library
Emo Public Library
Englehart Public Library
Espanola Public Library
Fort Erie Public Library
Fort Frances Public Library Technology Centre
French River Public Library
Front of Yonge Township Public Library
Gananoque Public Library
Georgian Bay Township Public Library
Georgina Public Library
Gore Bay Union Public Library
Grand Valley Public Library
Gravenhurst Public Library
Greater Madawaska Public Library

Greenstone Public Library
Grey Highlands Public Library
Grimsby Public Library
Haldimand County Public Library
Haliburton County Public Library
Halton Hills Public Library
Hanover Public Library
Hastings Highlands Public Library
Havelock-Belmont-Methuen Public Library
Hawkesbury Public Library
Head, Clara & Maria Public Library
Hearst Public Library
Hilton Union Public Library
Hornepayne Public Library
Huntsville Public Library
Huron County Public Library
Huron Shores Public Library
Ignace Public Library
Iroquois Falls Public Library
James Township Public Library
Kanhiote Library
Kapuskasing Public Library
Kawartha Lakes Public Library
Kearney and Area Public Library
Kenora Public Library
Killaloe & District Public Library
King Township Public Library
Kirkland Lake Public Library
Lanark Highlands Public Library
Larder Lake Public Library
Laurentian Hills Public Library
Leeds and the Thousand Islands Public Library
Lennox and Addington County Public Library
Lincoln Public Library
Madawaska Valley Public Library
Magnetawan First Nation Public Library
Magnetawan Public Library
Manitouwadge Public Library
Marathon Public Library
Markstay-Warren Public Library
Marmora & Lake Public Library
Mattawa Public Library
McGarry Township Public Library
McKellar Township Public Library
Meaford Public Library
Merrickville Public Library

Michipicoten First Nation Public Library
Mississauga First Nation Public Library
Mississippi Mills Public Library
Moonbeam Public Library
Muskoka Lakes Public Library
N.E.M.I Public Library
Nation Municipality Public Library
Newmarket Public Library
Niagara Falls Public Library
Ninda-Kikaendjigae Wigammik First Nation Public
Library
Nipigon Public Library
Nipissing First Nation Public Library
Norfolk County Public Library
North Bay Public Library
North Grenville Public Library
North Kawartha Public Library
Oliver Paipoonge Public Library
Ontario Library Service - North
Orangeville Public Library
Orillia Public Library
Otonabee-South Monaghan Public Library
Owen Sound and North Grey Union Public Library
Oxford County Library
Parry Sound Public Library
Pelham Public Library
Pembroke Public Library
Perry Township Public Library
Perth and District Union Public Library
Petawawa Public Library
Peterborough Public Library
Pickering Public Library
Port Colborne Public Library
Port Hope Public Library
Powassan & District Union Public Library
Prescott Public Library
Prince Edward County Public Library
Prince Township Public Library
Quinte West Public Library
Rainy River Public Library
Red Lake Public Library
Red Rock Public Library
Renfrew Public Library
Rideau Lakes Union Library
Russell Township Public Library
Sables-Spanish Rivers Public Library
Sachigo Lake First Nation Public Library

Saugeen First Nation Public Library
Sault Ste. Marie Public Library
Schreiber Public Library
Scugog Memorial Public Library
Seguin Public Libraries
Selwyn Public Library
Severn Township Library
Shelburne Public Library
Sioux Lookout Public Library
Six Nations First Nation Public Library
Smith's Falls Public Library
Smooth Rock Falls Public Library
South Algonquin Public Library
South River – Machar Union Public Library
Southgate Public Library
Spanish Public Library
St. Charles Public Library
St. Joseph Township Public Library
St. Thomas Public Library
Stirling-Rawdon Public Library
Sundridge Public Library
Temagami Public Library
Temiskaming Shores Public Library
Terrace Bay Public Library
Thessalon Public Library
Thorold Public Library
Thunder Bay Public Library
Tillsonburg Public Library
Timmins Public Library
Trent Hills Library - Campbellford-Warkworth-Hastings
Trent Lakes Public Library
Tweed Public Library
Tyendinaga Township Public Library
Uxbridge Public Library
Wahta Mohawks Library
Wainfleet Public Library
Wasauksing First Nation Public Library
Wawa Public Library
Welland Public Library
Wellington County Public Library
West Grey Libraries
West Lincoln Public Library
West Nipissing Public Library
Westport Public Library
White River Public Library
Whitefish River First Nation Public Library
Whitestone-Hagerman Memorial Public Library

Whitewater Region Public Library
Wikwemikong Public Library
Wollaston and Limerick Public Library
Woodstock Public Library

APPENDIX B

Ontario Library eBook Survey Questions

eBook Survey for Ontario Libraries

eBOUND
CANADA

Introduction

Canadian publishers are very committed to working with Ontario libraries and we very value the role libraries play within their various communities. Our goal is to provide publishers with a better understanding of acquisition needs and trends so that they can work more effectively within the various library systems.

eBOUND Canada is working with Page Two Strategies and Tricia McCraney to conduct this research. We greatly appreciate your insight and support.

* 1. Your name

* 2. Your email address

* 3. Library name

* 4. Population served

* 5. My library is a member of:
Select all that apply.

☐ CLA   ☐ CULC

☐ OLA

Others (please specify)

1

6. Are you part of a library consortium?

○ Yes   ○ No

If yes, please specify

[   ]

7. Do your patrons access shared / floating ebook collections?

○ Yes   ○ No

If yes, please explain

[   ]

8. Does your library prioritise, or have a mandate to acquire Canadian digital content?

○ Yes   ○ No

Comments

[   ]

9. Do you anticipate that Canadian digital content will be more of a priority in the future?

○ Yes   ○ Not sure

○ No

10. How is Canadian content identified? Select all that apply.

☐ By publisher   ☐ By author or contributor

Other (please specify)

[   ]

2

11. Who identifies Canadian ebook content for you?
Select all that apply.

☐ We do

☐ Library & Archives Canada

☐ Vendors such as Overdrive, 3M, BiblioCommons, OCLC, etc.

☐ Canadian publishers

☐ BookNet Canada or Loan Stars

☐ OLA, CLA or CULC

Others (please specify)

[   ]

* ## 12. Does your library allocate specific budget amounts to both print and
digital materials?

○ Yes

○ No

○ Not sure

Comments

[   ]

3

eBook Licensing
Models

Help us understand eBook licensing models, and which ones are preferred by librarians and patrons.

*13. We purchase or license from the following.
Select all that apply.

☐ Direct from multinational publishers   ☐ 3M / Biblioteca Cloud Library

☐ Direct from independent publishers   ☐ Tumblebooks

☐ OverDrive   ☐ Canadian Electronic Library

☐ Baker & Taylor's Axis 360   ☐ EBSCO

☐ Others (please specify)

[   ]

*14. What is the most common access model used by your library when licensing eBooks?

◯ Single copy, single user   ◯ Single copy, multi user

◯ Other (please specify)

[   ]

*15. Is there a typical, specified term (# of circs or time limit) associated with this model?

◯ Yes   ◯ Not sure

◯ No

Please explain

[   ]

4

* 16. Please note other access / term models that you license under

* 17. Licensing models your library loves?
Please tell us why.

* 18. Licensing models that are not preferred? Please tell us why.

* 19. How would you describe your library's willingness to experiment with / try new eBook licensing models?

○ Definitely would   ○ Definitely would not

○ Probably would   ○ Not sure

○ Probably would not

5

eBook Survey for Ontario Libraries

eBOUND
C A N A D A

Formats, Devices and
Pricing

_____

Help us understand a bit more about formats and devices that work for your library, and your preferences around pricing.

* 20. What format do your patrons prefer?

◯ EPUB   ◯ PDF

◯ Other (please specify)

[   ]

* 21. Are there device preferences you can speak to?

[   ]

* 22. Do you typically pay eBook vendors in US funds?

◯ Yes   ◯ Not sure

◯ No

Comments

[   ]

* 23. How does eBook pricing influence acquisition? (e.g. we measure price against expected circulations)

[   ]

6

24. Fair eBook pricing: tell us your thoughts.

7

eBook Survey for Ontario Libraries

Discoverabilit
y

Thanks for hanging in!
Only four more questions, to help Canadian publishers understand how we can support you.

* 25. We want to know how and where you find Canadian eBooks.

My library uses:

☐ Loan Stars

☐ 49th Shelf.com

☐ Others (please specify)

☐ Newsletters or marketing blasts from Canadian publishers

☐ BookNet Canada's bestseller lists

[   ]

* 26. Please describe any challenges or barriers to finding Canadian eBooks.

[   ]

* 27. What has the biggest influence on eBook selection in your library?

○ Patron demand

○ Genre

○ Other (please specify)

○ Bestseller lists

○ Canadian content

[   ]

8

* 28. How do you *primarily* select books to feature or promote to patrons?

○ Based on bestseller lists
○ Based on media coverage
○ Based on events at our library
○ Based on local interest
○ Based on other local or national events
○ Other (please specify)

[   ]

29. Please tell us 3 things Canadian publishers can do to support Ontario libraries.

[   ]

9