



Freckle project: Reading Survey Results

April 2019

WHERE DID YOU GET THAT BOOK?



The actions proposed and policy messages in this presentation are drawn from

- (Unless otherwise stated): A consumer survey carried out in the United States in April 2019
- Publicly available library data from Pew and from the IMLS
- The author's experience

Method of the consumer survey:

- 1,200 respondents were included in a consumer survey which was conducted in April 2019.
- In addition, those 1,200 responded on behalf of a further 500 family members who were too young to be included directly, giving a total of over 1,700 responses.
- Respondents were from six states, in equal numbers: California, Florida, Michigan, New York, Ohio, and Texas.
- InterQ, The consumer research agency in San Francisco who designed and conducted the field work, advised that:
 - The margin of error of the results is 2.62%, which is the range that the population's responses may deviate from our survey sample.
 - We would not expect the results to change meaningfully if it was rolled out to more people, as it is an opinion and facts survey. We are not looking for rare events or trying to ascertain the rate of a background event.

The purpose of this survey

- Surveys of public library users regularly show that more than 75% of visits to libraries, or use of library facilities, are about books in various forms.
- Reading books, referring to them, talking about them, borrowing them, all feature among the main reasons why people use public libraries.
- The survey aimed to find out, by asking members of the public, where libraries fit into their ability to find what they want to read,
- By doing that the intention was to share that information with librarians, publishers and authors in order to inform their combined approach to giving service to the public.

EXECUTIVE SUMMARY

- This is a report of a consumer survey, conducted in April 2019 in the United States entitled ‘**Where** did you get that book?’

It appears to be the first ever survey to ask readers questions of the kind it does. It concentrates on public libraries and the publishers who supply books to them.

- The survey found that over 80% had read or used a book in the last year and by far the great majority of the reading was of printed books (rather than eBooks or Audio). It concluded that people find reading to be a very important part of their culture.
- The survey found that, compared to other possible sources, in the US, **public and educational libraries play a very significant part in the provision of printed books to readers**. The report suggests therefore that **the provision of printed books is the single most important endeavour of public and school libraries** and for that contribution to culture and community it is worth the public funds that are granted.
- The report also suggests that sustaining and the growth of reading and use of books should be the primary object and management focus of public and school libraries and that measures should be in place, which are not currently, constantly to demonstrate the achievement of this to funders, the public, authors and publishers. Existing library management systems could be used to do this.

- The report recommends that the relationship between public libraries and publishers should be renewed with a greater recognition of their joint endeavour to satisfy and please readers. For this to be achieved there needs to be a flow of detailed information directly between them about reading and about catalogs and titles. There is a significant gap in the industry knowledge of what people read and what is available for them. The report makes recommendations about how improvement can be achieved, again, by using existing library management systems
- There are more than 2bn books circulated each year from US public libraries, and authors and publishers have no information about what has been circulated and what has not been. To promote the common interest of libraries, publishers and authors, it is of paramount importance to make this information available to all parties without exposing personally identifiable information.
- The survey also identified a problem of the numbers of people wanting to read, who experience difficulties with their eyesight. 20% said they find difficulty reading print books and 18% said they have difficulty with eBooks. The report suggests that this is a problem that should be tackled jointly by libraries and publishers, with specific and agreed targets for improvement.

Key Findings

1. In the US over 80% of people read or use books.
2. Most reading is for enjoyment, rather than for information or education.
3. Public and educational libraries play a very significant part in the provision of books to readers.
4. People of all ages, but especially the young, prefer public and school libraries over internet book stores for finding what they want to read.
5. A significant number of people experience eyesight difficulty that makes it difficult to read either print or eBooks.
6. There is a lack of publicly available timely management performance data for libraries and the books they circulate.

Insights

1. Promoting the growth of reading should be the primary objective of public and school libraries.
2. Management in the library and publishing industries should give focus to their efforts to support this objective.
3. There are major differences between book sales data and what is actually read.
4. Publishers, libraries, funders and governments have a common interest in promoting and increasing reading and pleasing readers.
5. There needs to be a marked improvement in the flow of information between libraries, publishers and authors to promote their common interest.
6. The beacon must be efficient pursuit of what readers want, based on a data-driven approach.

Notes on the author:

- Tim Coates has worked in the book industry for more than 40 years: in retailing, libraries and publishing. He has been marketing and then managing director of several large book retailers, including Waterstone's, the leading UK bookstore group, and of WH Smith in Europe. He has been UK general manager of YBP, the academic division of Baker and Taylor, and now part of EBSCO. He is frequently called upon to advise on and write reports for local and national government bodies on the public library sector.
- On three occasions he has been named 'The best bookseller': once by Peter Mayer of Penguin Books, New York, once by Paul Hamlyn, of Hamlyn Octopus and Reed international, the publisher of illustrated books and once by the British Book trade press. He has frequently appeared in lists of most influential people in the publishing industry.
- He has written several works on the public library service and holds masters' degrees from Oxford and from Stirling universities. He is also a published author of fiction and non fiction.
- tim@freckle.us



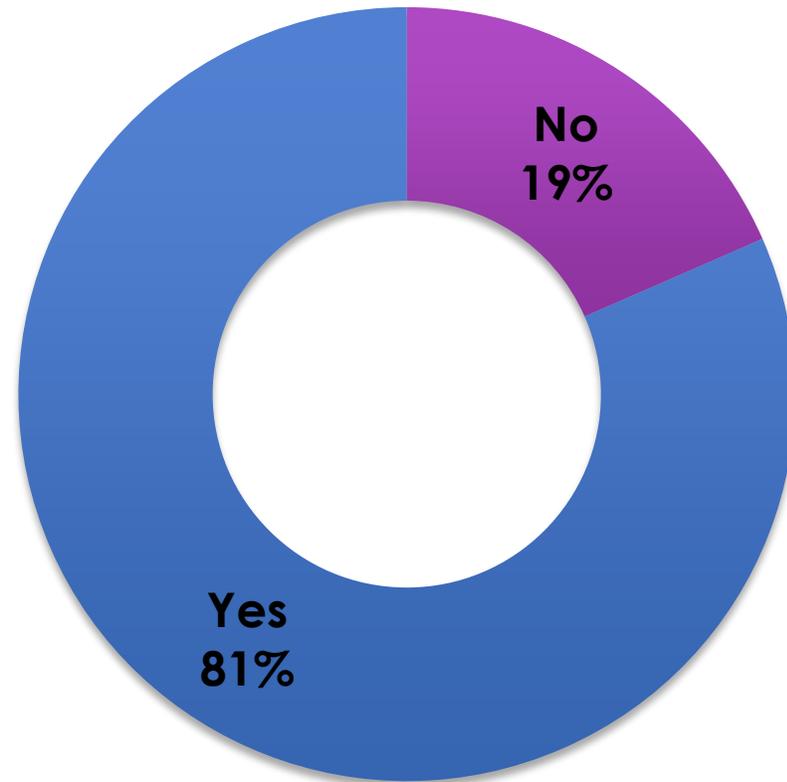
Freckle.us Reading Survey Results

April 2019

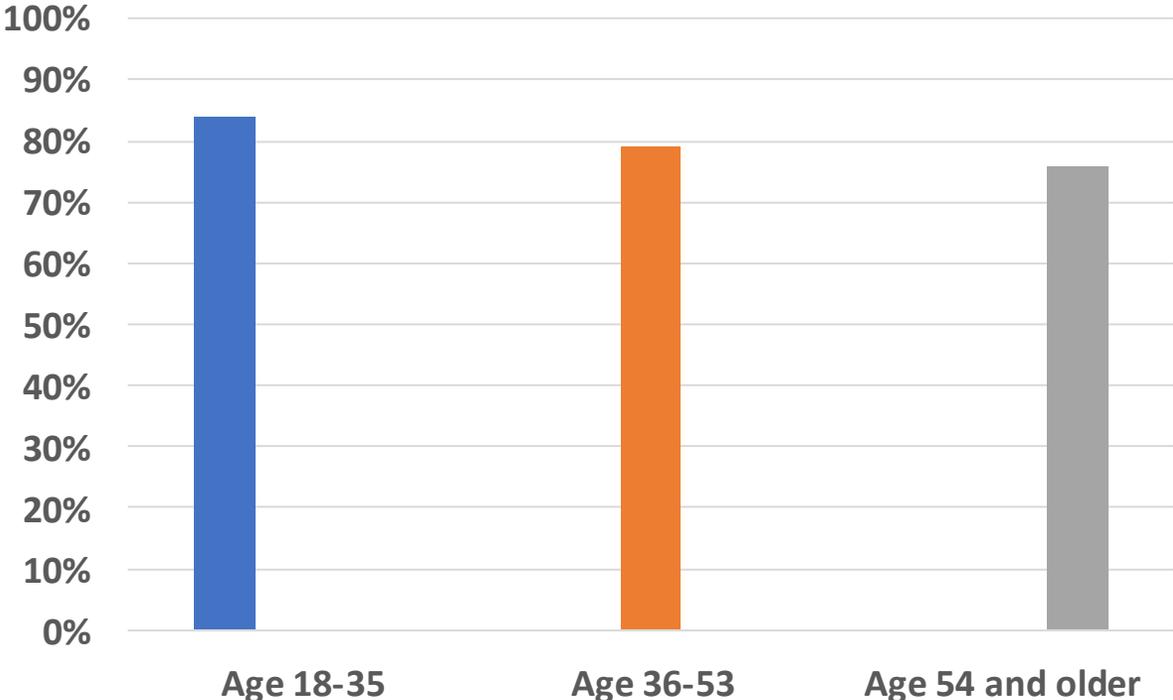
WHERE DID YOU GET THAT BOOK?

HEADLINES

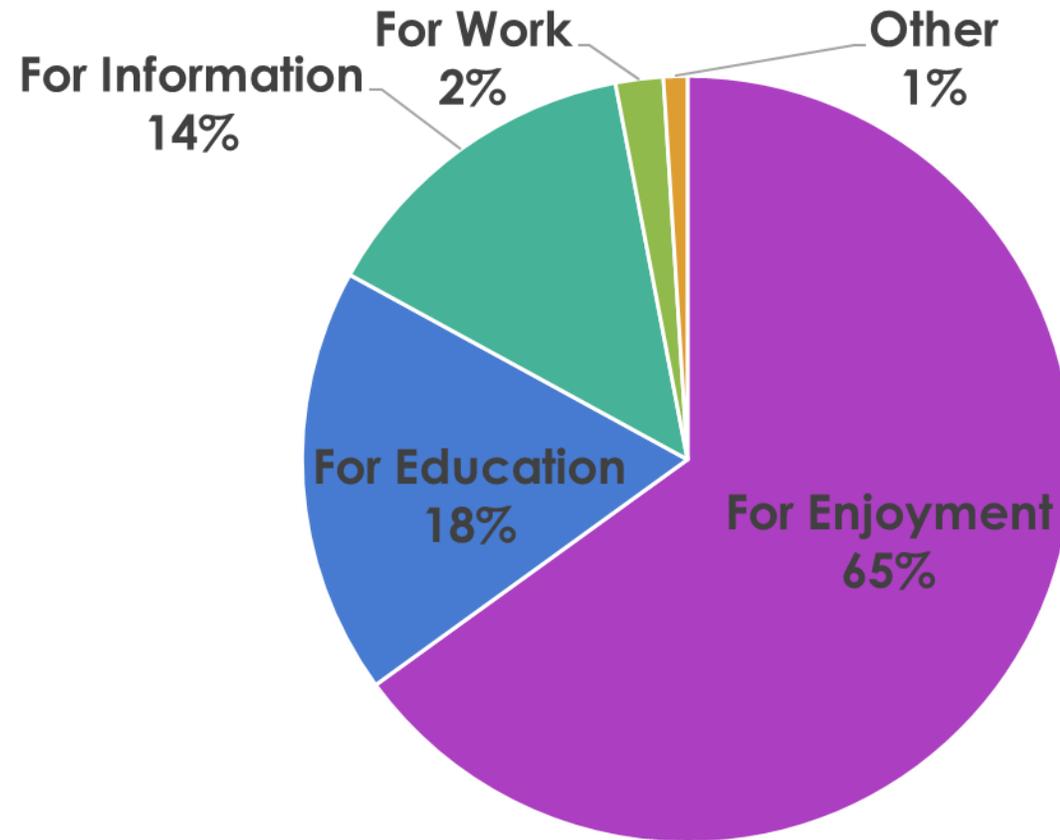
DID YOU READ OR MAKE USE OF A BOOK
IN THE PAST 12 MONTHS?



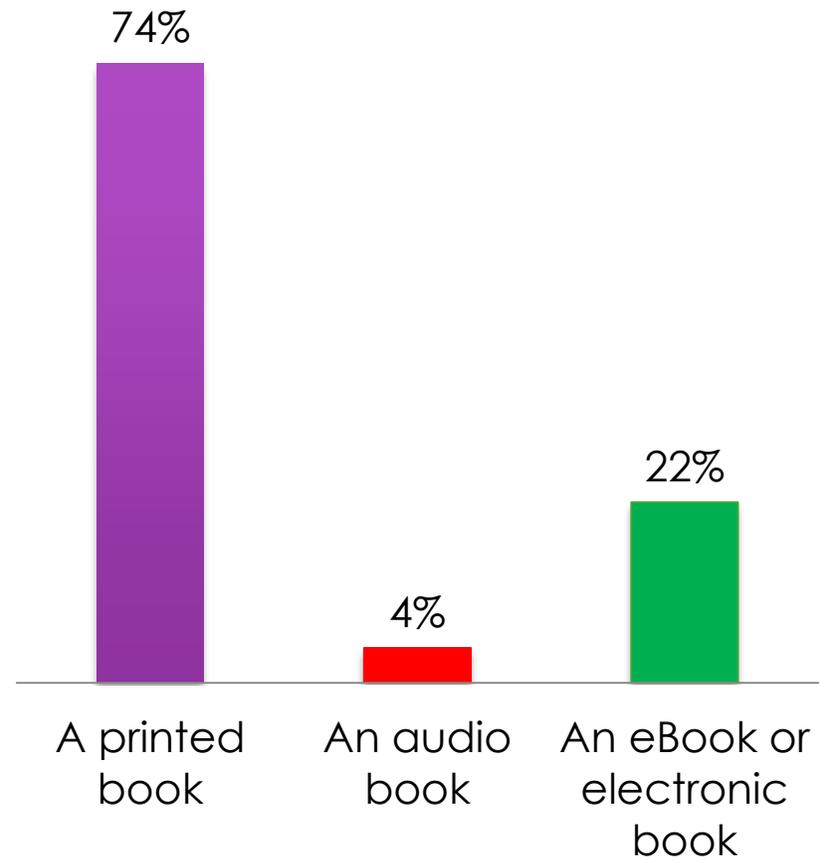
DID YOU READ OR MAKE USE OF A BOOK IN THE PAST 12 MONTHS?



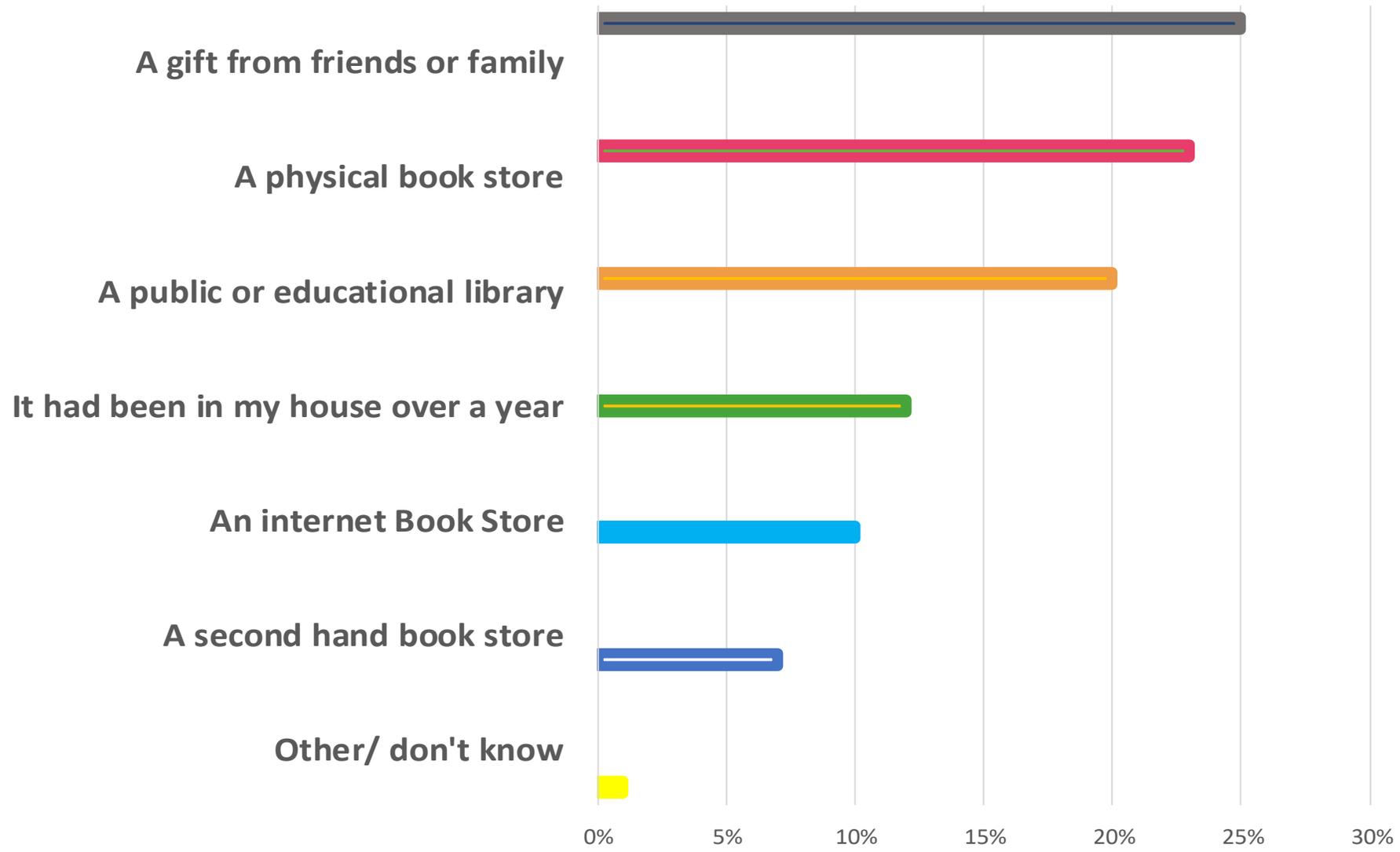
REASONS FOR READING A BOOK



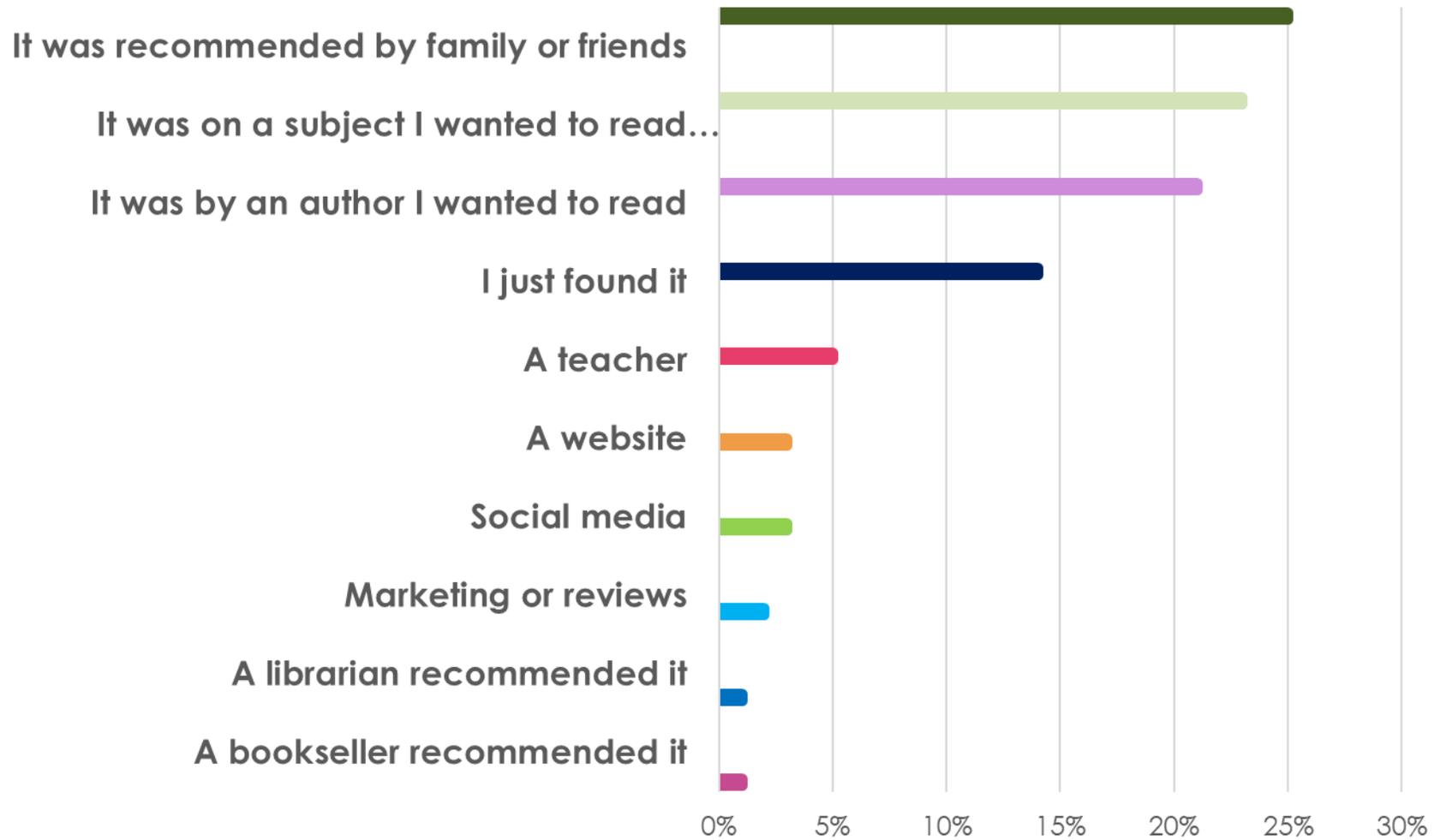
FORMAT OF BOOK



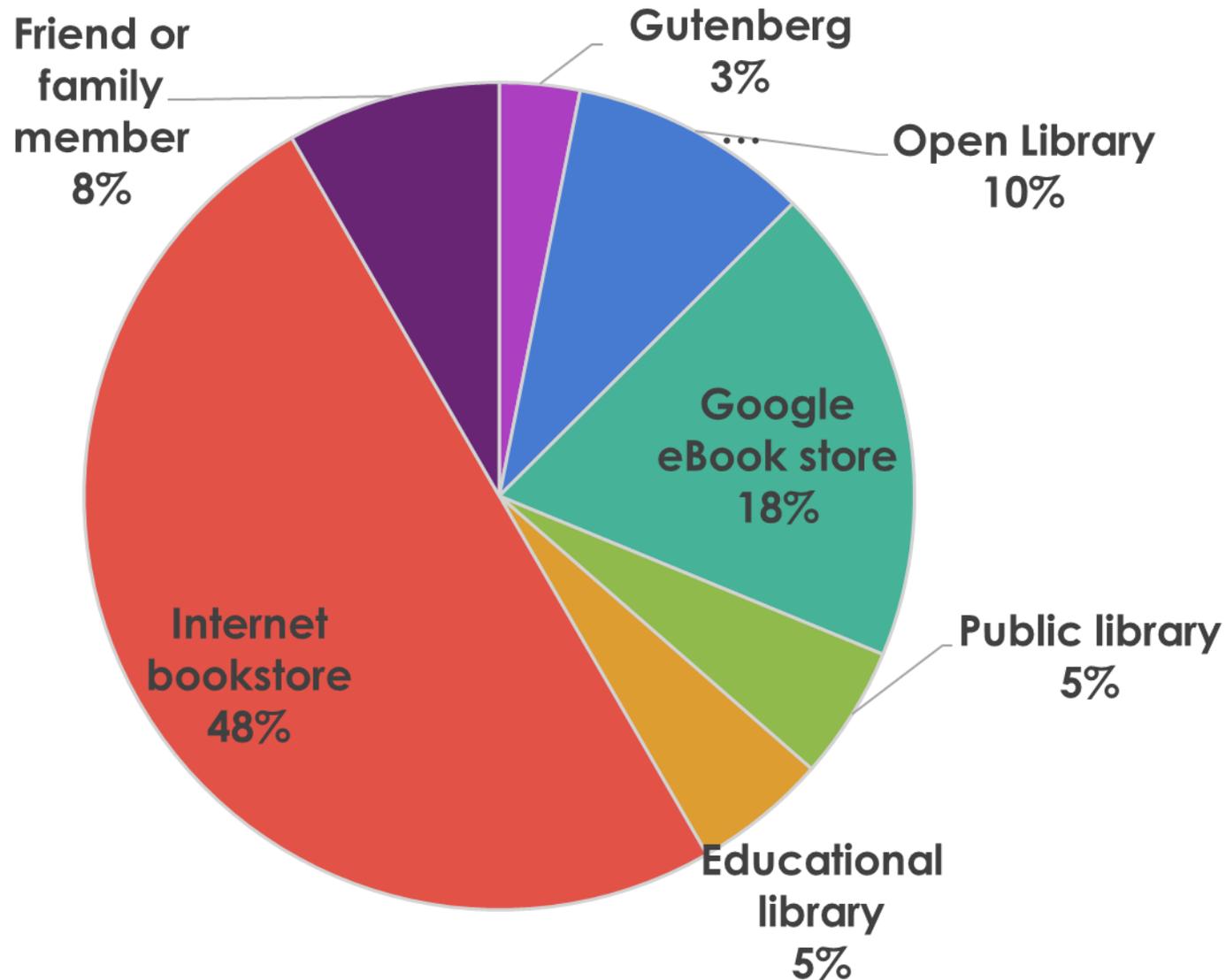
WHERE DID YOU GET THE **PRINT** BOOK YOU HAVE BEEN READING?



WHAT MADE YOU DECIDE TO READ IT?



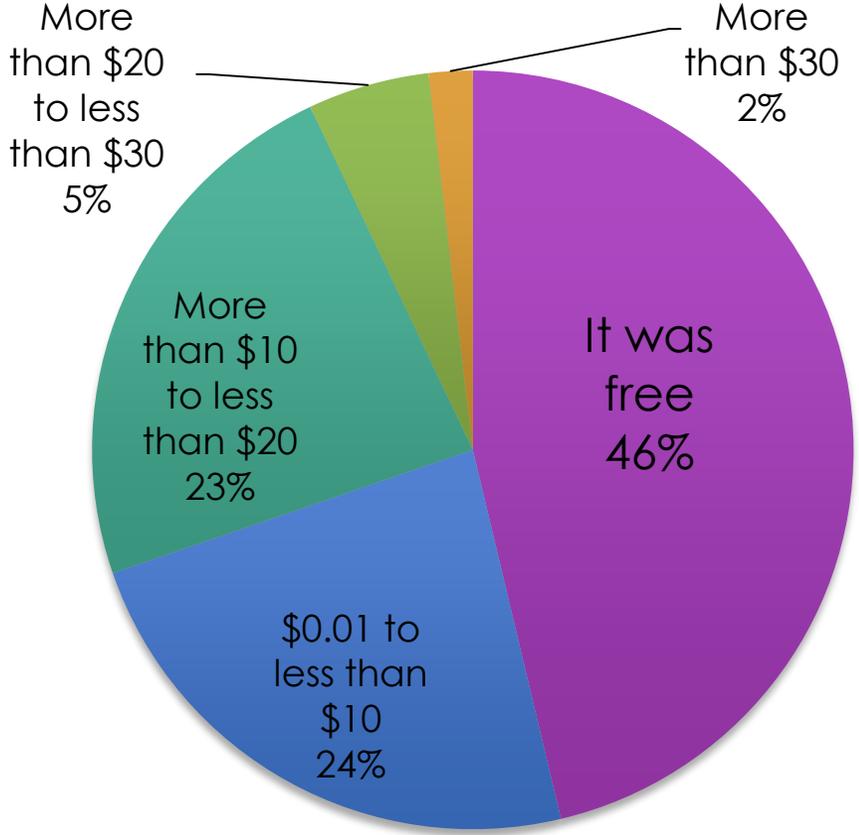
FROM WHERE DID YOU OBTAIN THE **eBOOK** YOU HAVE BEEN READING ?



Public libraries are not yet recognized as a leading source of eBooks.

This is also important to know

WHAT DID YOU PAY TO READ YOUR BOOK?

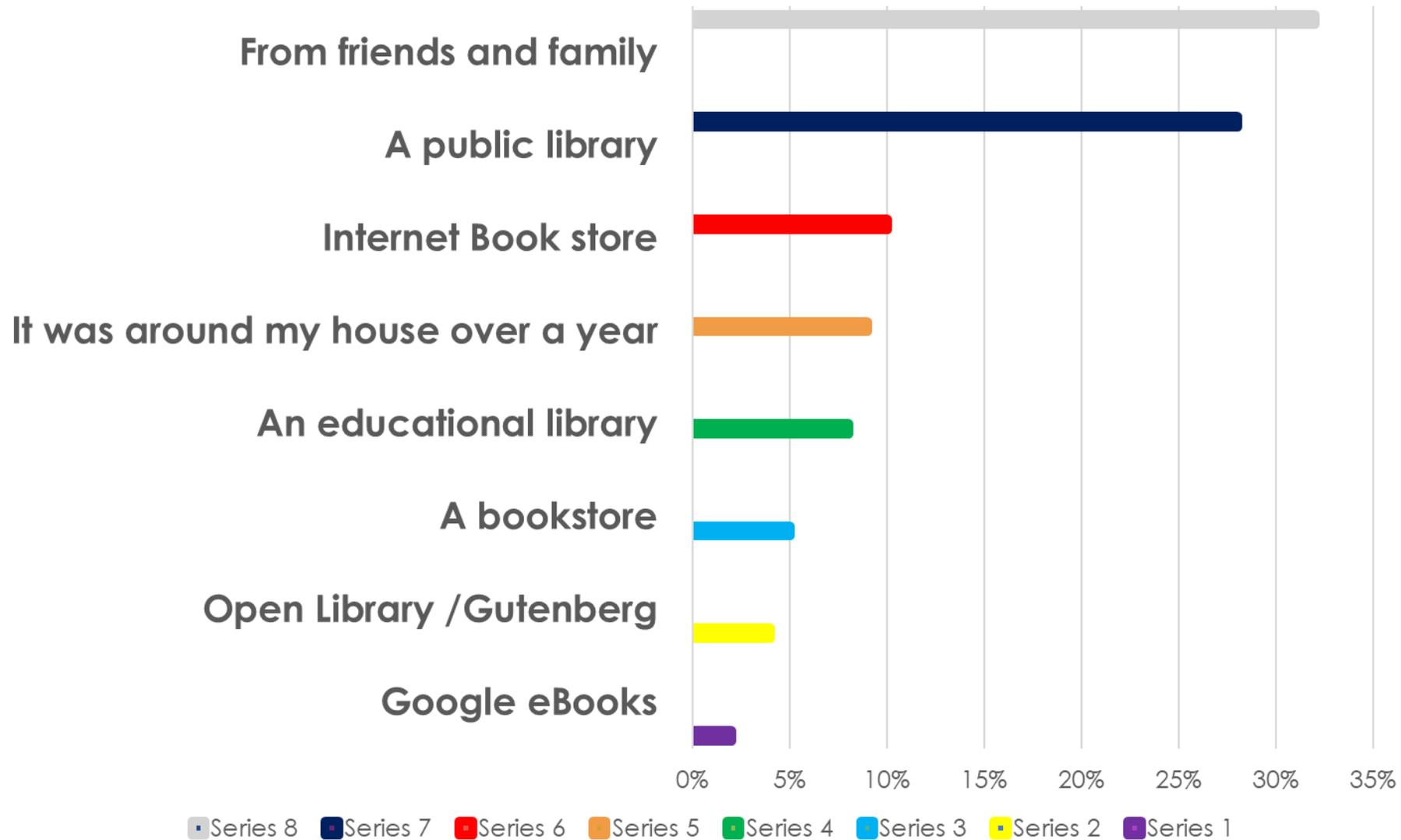


Almost half of books are read for free. Authors and publishers will be surprised at this result.

It is not about 'piracy'. But it shows a serious disconnection between data on book 'sales' and on book 'reading'

It implies a possible loss of income, but, more importantly, a lack of information about what people read.

IF YOU DIDN'T PAY FOR YOUR BOOK, WHERE DID IT COME FROM?



THE SURVEY ASKED RESPONDENTS ABOUT THE BOOK THEY HAD READ MOST RECENTLY

- Their responses included the works of 955 different authors.
- 90% had one entry each
- 1 author had 62 entries
- The tastes of the reading community are extremely diverse.

Readers' Top Ten

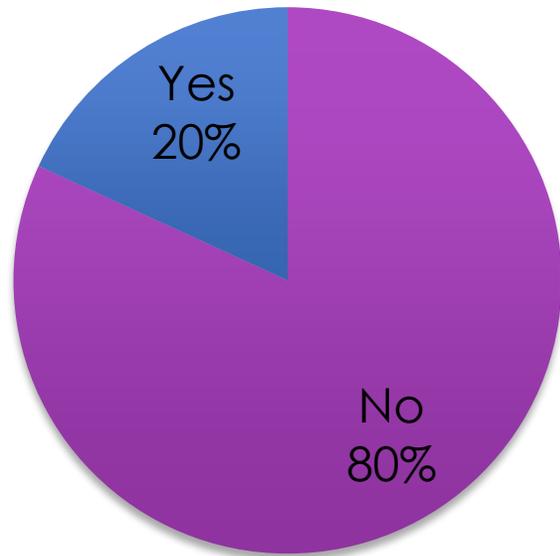
1. JK Rowling - Harry Potter
2. Stephen King
3. The Bible
4. Dr Seuss
5. James Patterson
6. Michelle Obama
7. Jeff Kinney
8. Stephanie Meyer
9. Agatha Christie
10. Dumbo (Disney)

11. SALES TOP TEN : APRIL 2019 – FROM THE NEW YORK TIMES

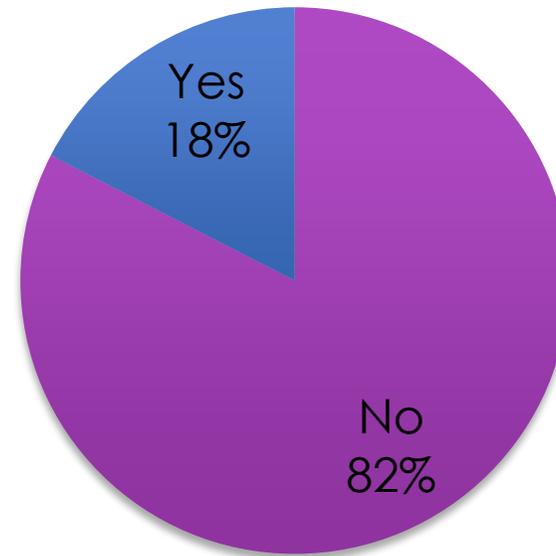
1. Delia Owens
2. James Patterson
3. Lisa Gardner
4. Lisa Kleypas
6. Mark Greaney
5. Andrew McCabe
7. Michelle Obama
8. Tara Westover
9. Adam Markos
10. John Carreyrou

12. DO YOU HAVE ANY VISION PROBLEMS THAT MAKE IT DIFFICULT TO READ BOOKS?

PRINTED



ELECTRONIC



CONCLUSIONS

1. More than 80% of respondents to a consumer survey (not obviously about books) said that they read or used a book in the last year. The number was consistent across all age groups and geographical areas: if anything it was higher among the young.

There is no evidence, despite all the media available to people, that reading or the use of books are on the decline. That on its own indicates that books in all forms and reading for sheer enjoyment are a much needed part of culture. This message cannot be stressed too strongly: ‘people like books.’

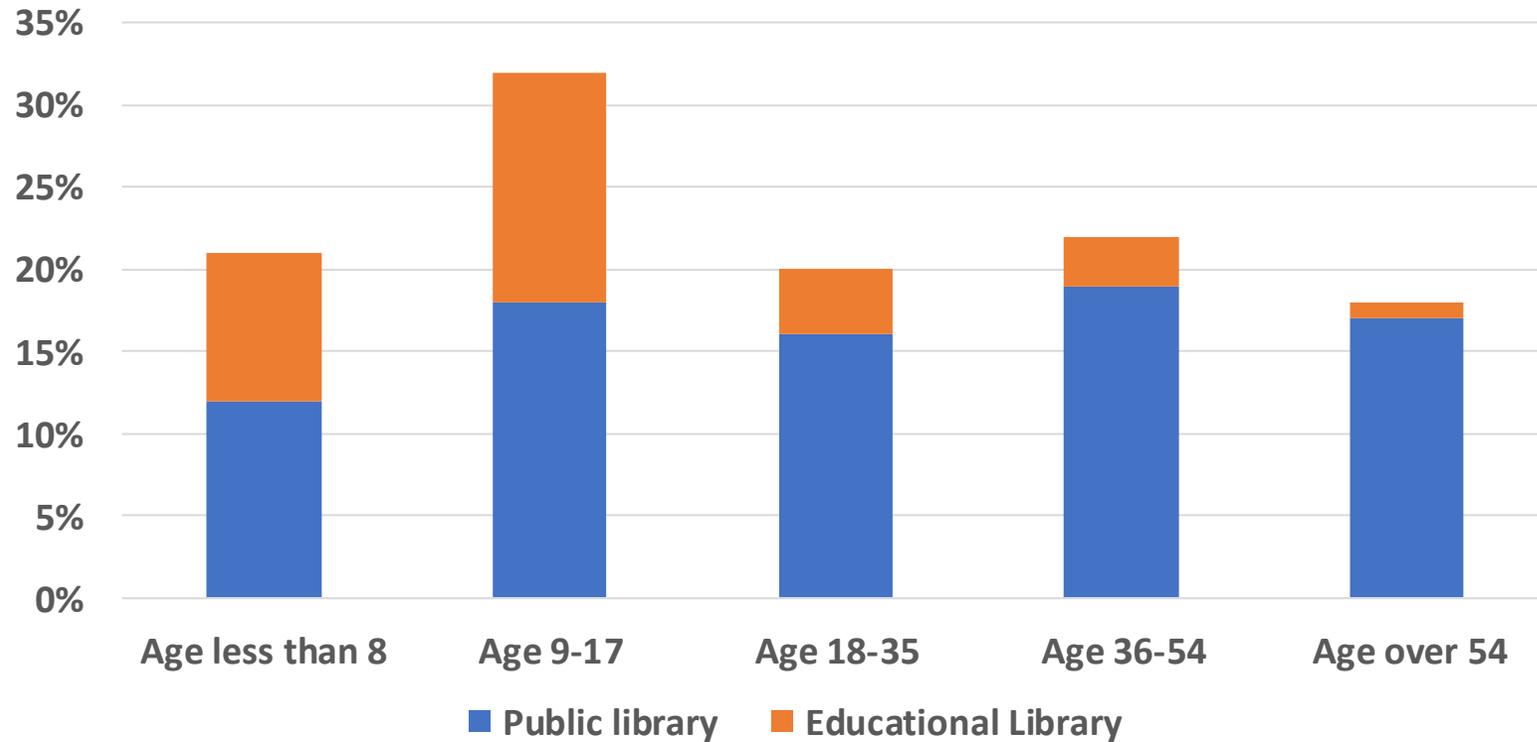
2. It is a strategic priority, therefore, for those who are occupied with purveying books (publishers, authors, librarians, booksellers and all their colleagues) to work together to seek to sustain and increase reading.
3. The whole book industry faces an issue of helping people with sight impairment.
4. The survey revealed that the way in which people get books is **complicated**. Twice as many books are read as are sold. Most industry recommendations, reviews, advice and discovery services, achieve very little. Publishers are probably only aware of about a quarter of reader activity. These findings will also be of concern to authors. There is an urgent need, and an obligation to readers, to the public and to public funds, for libraries and publishers to improve the access to information about what is being read, because that information can be used to increase reading.
5. Public and educational libraries play a vital role in the provision of reading. The survey showed that more print books that are read have come from public libraries than have been purchased in internet bookstores. For younger people the data shows that this is emphatically true. That is why libraries are important to communities and that is why communities and their officials should fund them. That should be the focus of library management. It should drive their strategy, their operations and their messaging.

RECOMMENDATIONS

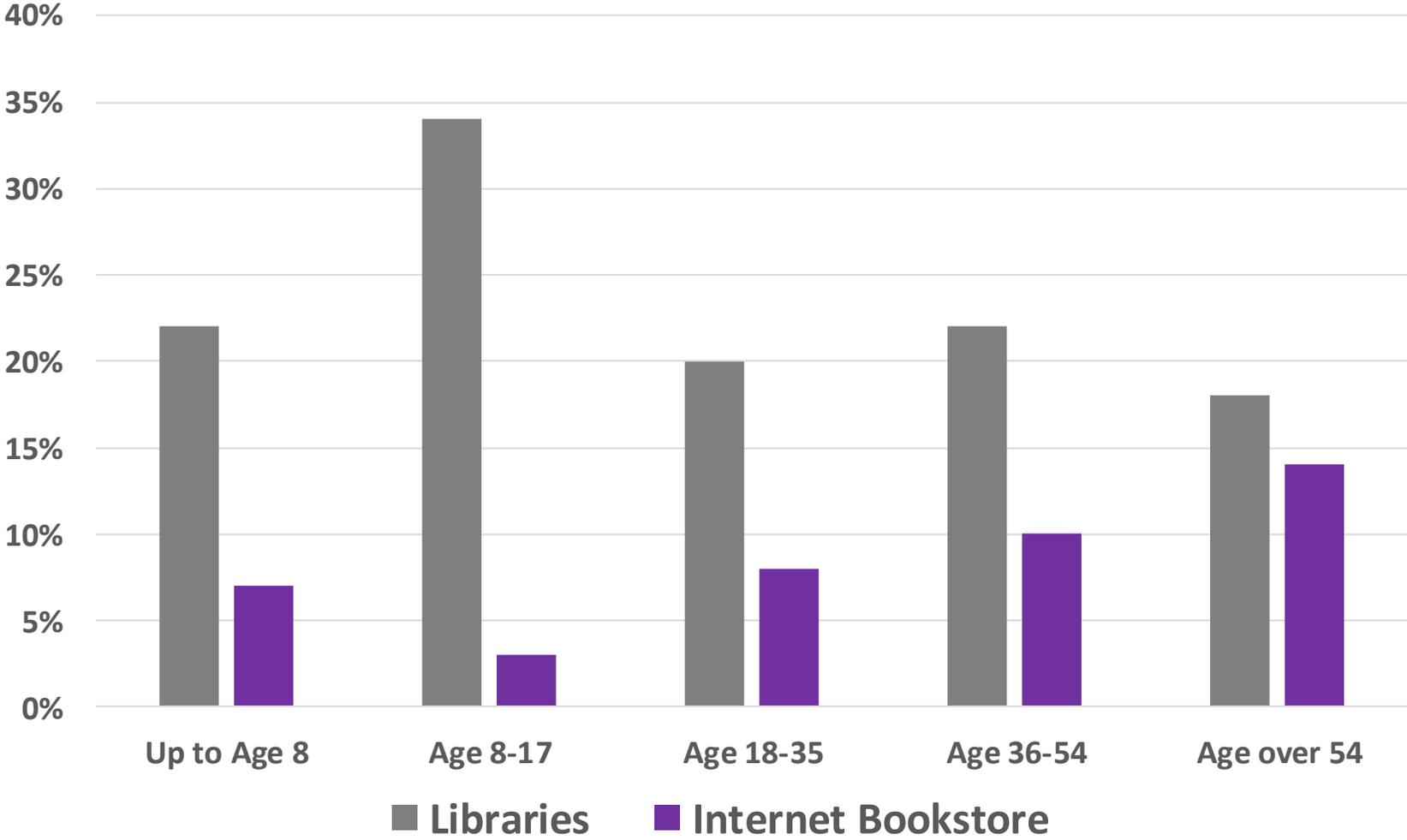
1. There needs to be more timely and clearer public measurement of the performance of public libraries: in May 2019, there is still no IMLS national measure of performance since 2016. Measurement should be quarterly and current. It can and should be provided and published by ILMS (library management system) providers.
2. Measurement of public library performance should include reader data of the kind in this report. It is more important to study use by readers than to attempt to measure ‘impacts’ or ‘outcomes’.
3. Reader use should be a performance indicator of every public library and the aim should be to increase it constantly. Such measures, and performance against them, should be clearly available to the public, to authors, to funders and to publishers, as well as librarians.
5. Public libraries and publishers need a joint action plan to address the needs of people with sight issues that make it difficult for them to read.
6. Public libraries and major publishers should have a joint and active plan to achieve measured increase in library use. In order to do that they need quickly to resolve issues about incompatible meta-data, catalogs and about privacy of information. This measurement work could easily be done by specifying standard requirements to ILMS companies.
7. Public libraries should focus their strategy, resources and management on increasing library use, on the measurements identified in this report, and on the provision of print books, as that is the feature of their service which has the highest reputation with the public.
8. **The beacon MUST be what READERS want** (not what librarians or publishers want)

DETAIL : FOR AGE UNDER 18

For a **printed book**: Did they use a public or educational library?

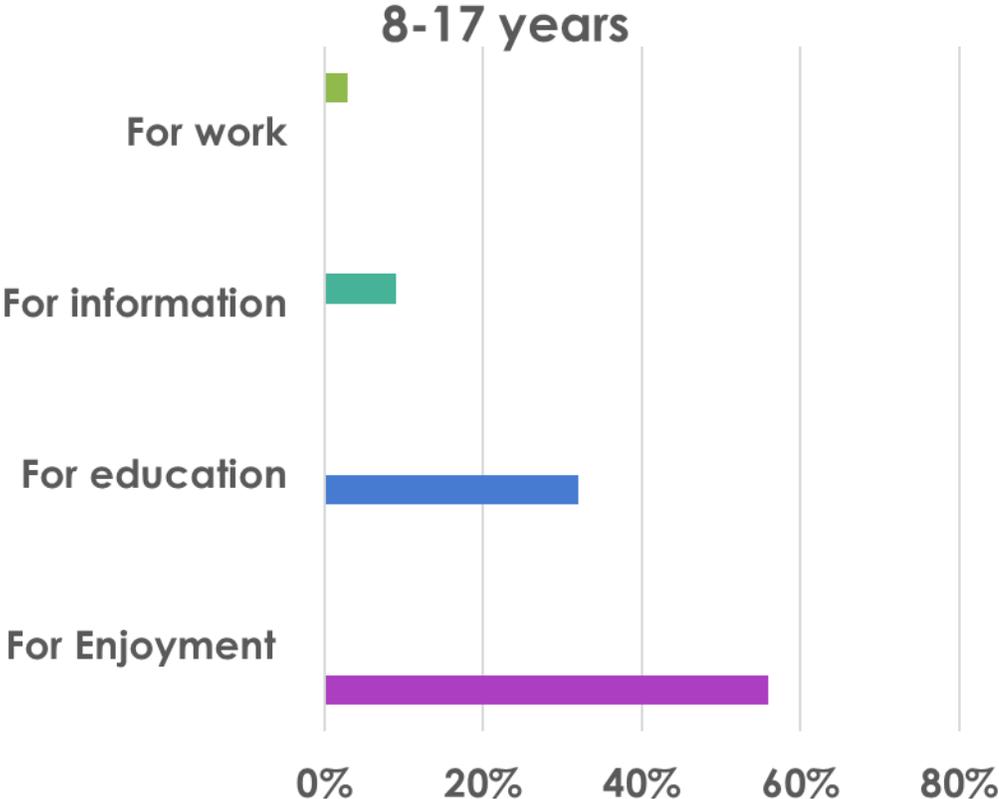
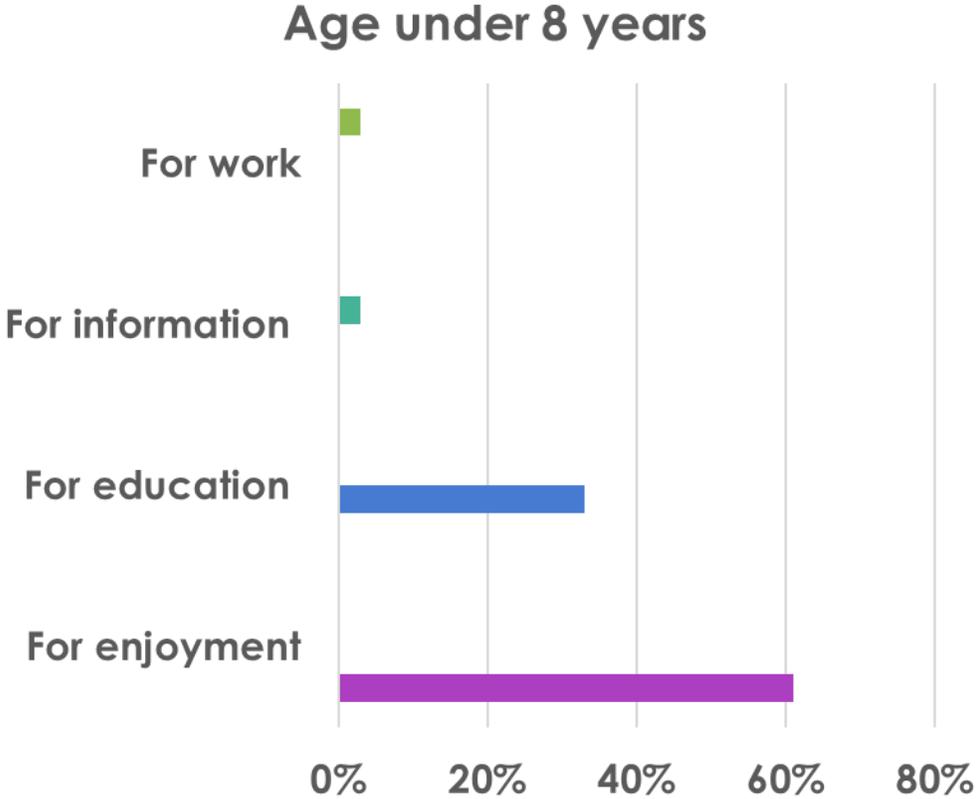


6. MOST FAVOR LIBRARIES OVER INTERNET BOOK STORES

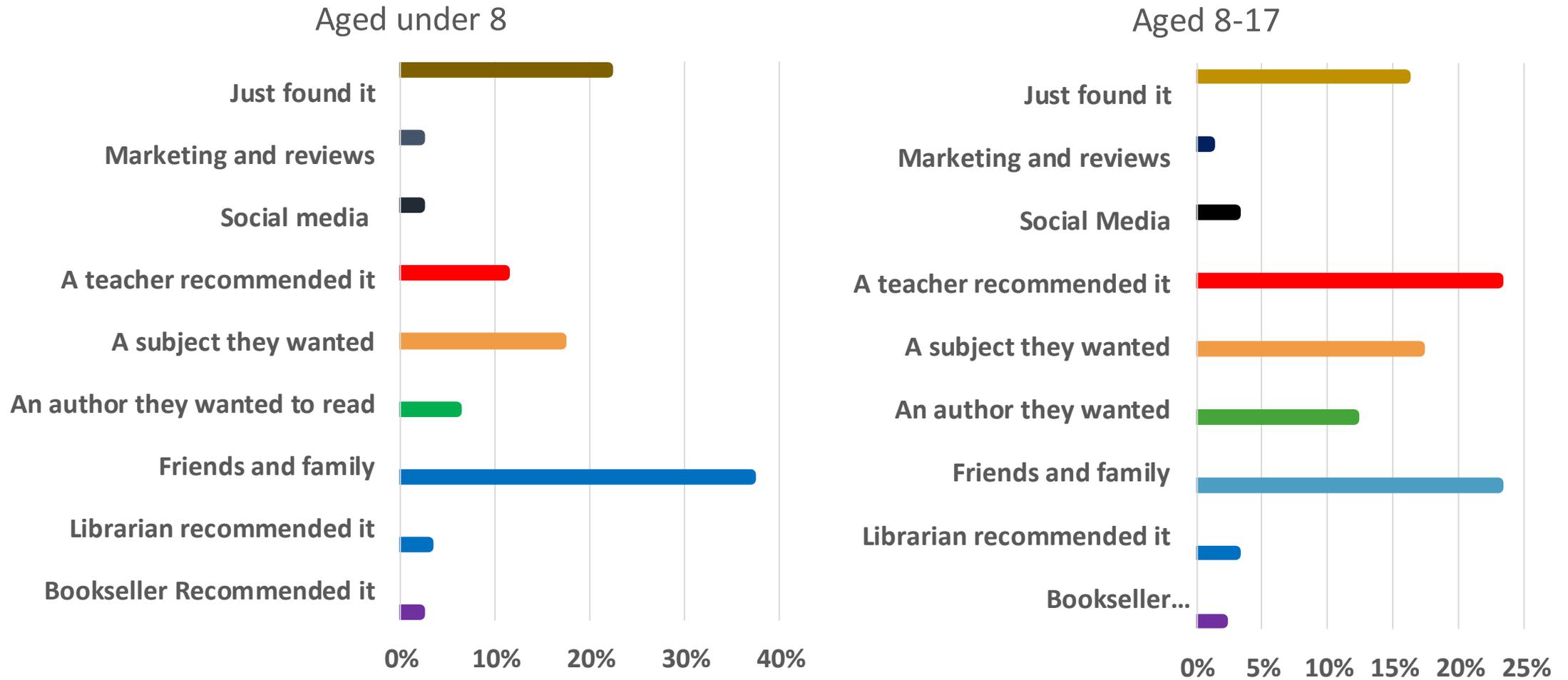


THE LAST BOOK THEY READ OR USED:

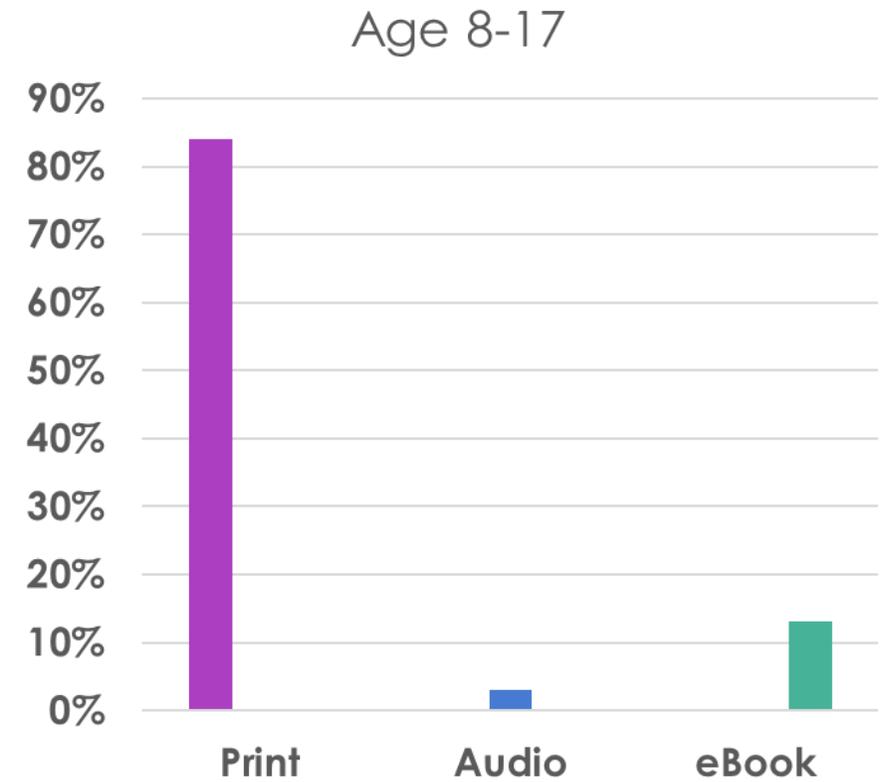
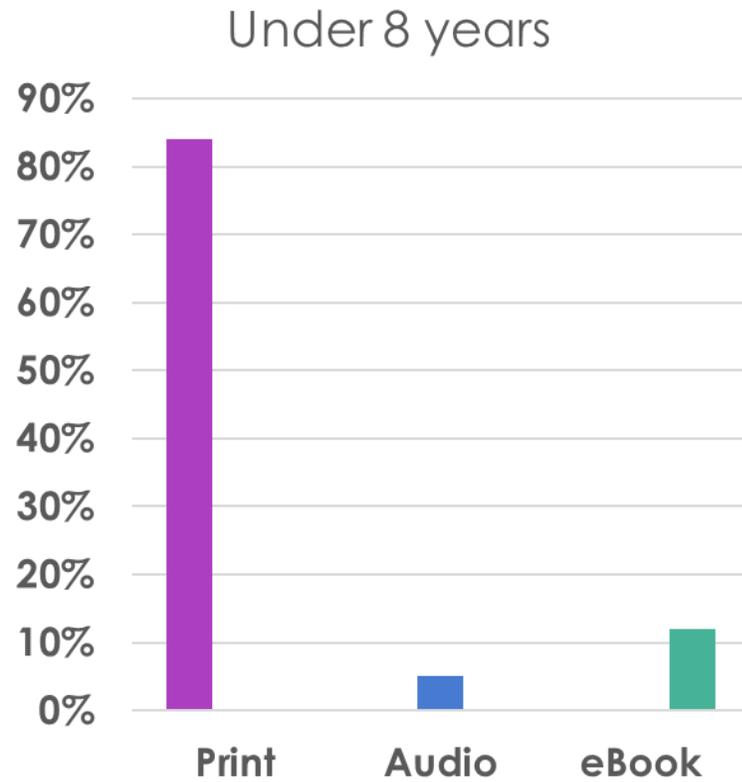
WHAT WAS THE REASON FOR READING IT?



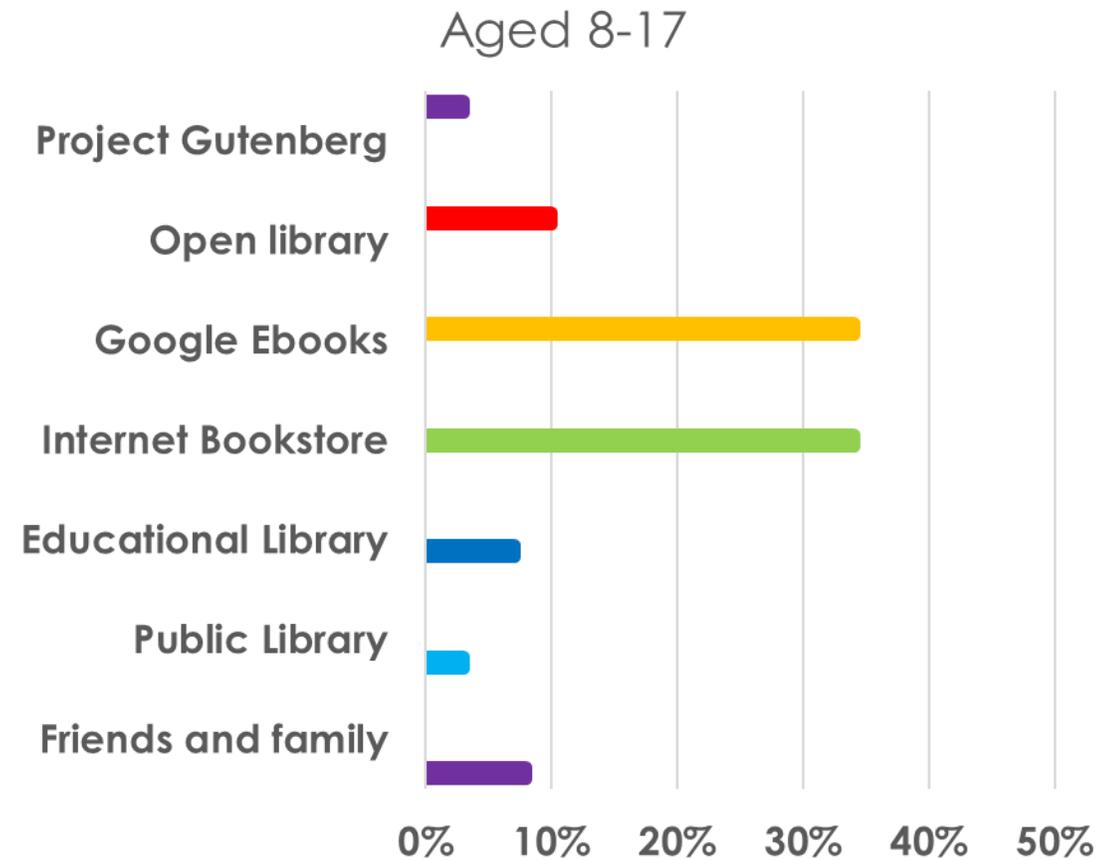
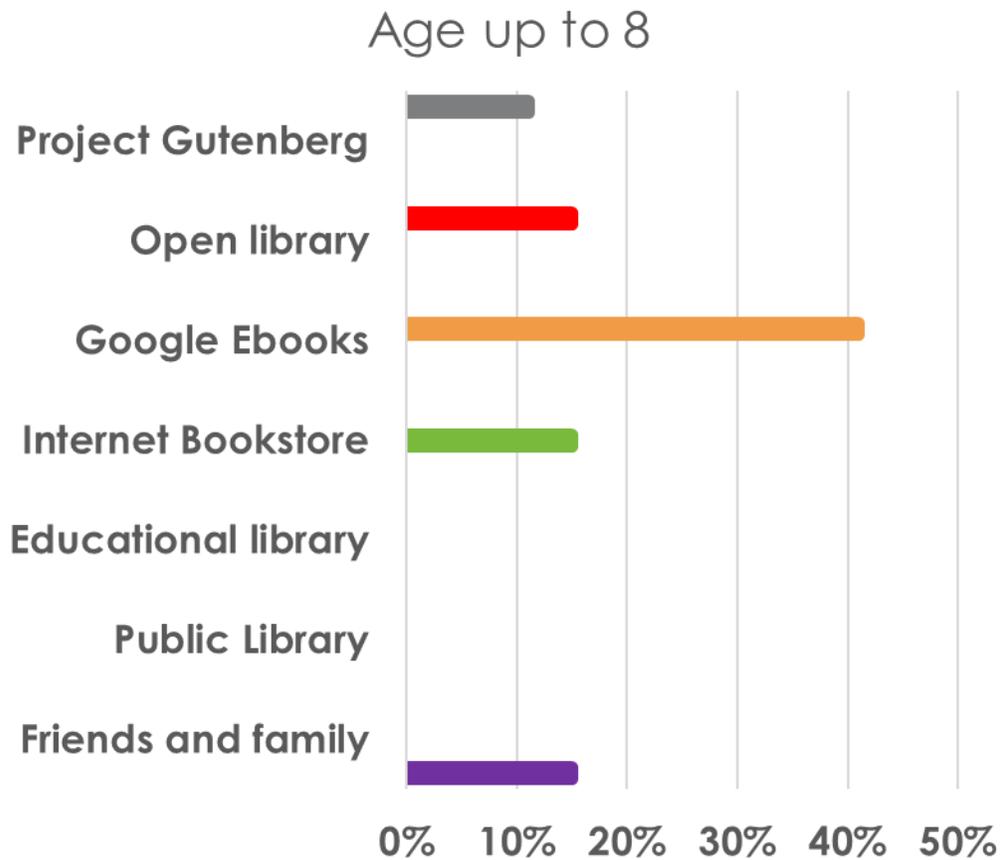
UNDER AGE 18: WHAT MADE THEM DECIDE TO READ IT?



UNDER AGE 18: FORMAT OF LAST BOOK READ OR USED



AGED UNDER 18: FROM WHERE DID They OBTAIN THEIR **E-Book**



FOR PUBLISHERS AND AUTHORS

- The survey asked readers from where they got the book they were reading most recently, and how much, approximately, they themselves paid for it
- Almost half said that they paid nothing. That does not imply large evidence of piracy, but rather that there is a significant disconnection between what publishers regard as 'sales' and what people actually read. They get their books other than by buying them. There are libraries and gifts and many other honest and proper ways to read a book without buying it. 'Reading' and 'book sales' are not the same thing at all. If the discrepancy were 10% it might not matter.

But it is 100% - which means that there is **missing revenue** and **missing understanding** of the performance of titles and authors' work.

- That is a revelation that should concern publishers and will concern authors.

The reading industry might be twice as big as the book publishing industry realises. They should find out.

Consistent industry reader surveys should be a regular event.

- A large part of this missing information lies within the considerable library management systems operated by libraries. It would be reasonable for publishers and authors to ask to see those figures **as a condition** of allowing books to be circulated.
- Libraries are a vital part of the process of introducing people to reading and to seeking works they will enjoy and use. It makes sense for publishers to seek to support, inform and encourage the public and school library services even more than they do now. Knowing that libraries are being efficient and being aware of what is being circulated can only help them to do that.
- The study also asked what persuaded a reader to read the book they are currently using. Two thirds said 'advice from family and friends'; 'the author' and 'the subject.' A further 14% said they came across it by chance.
- Very few people indeed said they responded to reviews, social media, or guidance from either booksellers or librarians. This information raises the question of the efficiency of marketing and 'discovery' by publishers, librarians and booksellers: a lot of effort may be producing very little.