

# Independent Mind

Baseline research report into ebook lending in public libraries for



# Libraries Connected

21<sup>st</sup> May 2024

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## 1. Executive Summary

### **Prevalence and rate of ebook borrowing**

- The library service data shows that:
  - an average of 7% of registered library users are ebook borrowers
  - on average, active ebook borrowers borrow 10 ebooks per year.
- 40% of those responding to the online survey had borrowed at least one ebook in the past year, while 75% had borrowed a physical book and 28% had borrowed both a physical and ebook.
- Just under one in ten (9%) of the total sample and just under a quarter (23%) of those who borrow ebooks say they have borrowed more than 20 ebooks in the past year.

### **Characteristics of ebook borrowers**

- According to the library service data ebook borrowers are:
  - more likely than average library members to be women, aged 45+ and particularly aged 55-74
  - less likely to live in deprived areas
  - relatively evenly spread across the income deciles, however lower deciles (1-4) form 28% of all ebook borrowers compared with 39% of all library members.
- Just over half (52%) of the ebook borrowers in the survey sample have been borrowing ebooks for over 2 years, with the remainder having borrowed ebooks for 1-2 years (24%) or first started borrowing within the last year (22%).

### **Reasons for borrowing physical and ebooks**

- Seven in ten (71%) physical book borrowers say that they borrow books to keep the cost down. Half (50%) say they borrow to try out new authors and books.
- The most common reason for borrowing ebooks is because they take up less space and are easier to carry than physical books – 39% of ebook borrowers selected this reason. Those who also buy a lot of ebooks are more likely than average to choose this reason (45%), which suggests that ebook borrowing is primarily related to format preference.
- The second most common reason for borrowing ebooks is similar to the most common reason for borrowing books – people borrow because they read a lot and this keeps the costs down. However, only 35% of ebook borrowers chose this reason, compared with 71% of physical book borrowers.

### **Reasons why people do not borrow ebooks**

- The most common reason for not borrowing ebooks was that they prefer physical or paper books (61%). This suggests that when library users are deciding whether to borrow a physical or ebook the primary driver is format preference.
- One in 5 (20%) who hadn't borrowed ebooks said this was because they were not aware that it was possible to borrow ebooks from the library service.
- Among the small minority (7%) who had tried to borrow an ebook but had not ended up doing so, the primary reasons for this were not being able to find anything they wanted to read in the catalogue (34%) and all the ebooks they wanted being already on loan (31%).

### **Book buying and its relationship to borrowing**

- Participants in the survey were more likely to have bought at least one book (92%) than borrowed a book (75%) in the past year.

- The survey data suggests that those who borrow physical books are more likely to buy physical books than those who do not borrow them: 93% of those who borrow physical books also buy them, but only 87% of those who do not borrow physical books buy them.
- It also shows a positive correlation between high rates of borrowing and high rates of book purchase i.e. that those who borrow more books also buy more books: 68% of those who borrowed more than 10 books in the past year bought more than three books, but only 55% of those who did not borrow books bought more than 10 books.
- The positive correlation between borrowing and buying is even more marked among those who borrow ebooks: only 32% of those who did not borrow ebooks in the past 12 months bought them, whereas 57% of those who borrowed ebooks also bought them.
- And this correlation strengthens the more ebooks are borrowed: only 19% of those who did not borrow ebooks say they bought more than 3 ebooks in the past year, whereas 38% of those who borrowed more than 10 ebooks bought more than 3 ebooks.
- The majority of those who borrowed ebooks felt that there had been no change in their buying habits.
- Over half of ebook borrowers (56%) said they have recommended an ebook they have borrowed to others.

#### **Experience of ebook borrowing**

- Overall, ebook borrowers are satisfied with the service and give it a mean score of 7.7/10.
- People were most likely to be satisfied with all aspects of the app experience, including:
  - ease of using the app once logged in (84% were satisfied or very satisfied)
  - ease of logging in (81% were satisfied or very satisfied).
  - ease of finding and downloading the app (80% were satisfied or very satisfied)
- The aspects of ebook borrowing that had lower satisfaction rates were:
  - the range and quality of authors available on the app (only 59% were quite or very satisfied and 17% were not very satisfied or very dissatisfied)
  - the availability of ebooks (only 46% were quite or very satisfied and 25% were not very satisfied or very dissatisfied).
- Only 10% of ebook borrowers say they have never or rarely had to reserve or wait for an ebook. 4 in 10 (40%) say that they have to wait for a book every time or most of the time when they want to borrow an ebook.
- When the ebook that borrowers want to borrow is not available on the app, the vast majority (83%) have joined the reservation or waiting list. Half (51%) have chosen something else to borrow on the app. Only 9% have bought the ebook and 8% have bought a physical copy of the book instead.
- 83% of ebook borrowers said they had wanted to borrow a title or author not listed on the app.
- When the title is not listed on the app, borrowers are most likely to borrow something else from the app - 58% have done this. A third (34%) have borrowed a physical copy of the book from the library. More have used the 'notify me' button to let them know when the title becomes available (27%) than have bought the ebook (22%).

#### **Impacts of ebook borrowing on users**

- In the qualitative interviews, borrowers expressed that the service reduces loneliness and isolation, especially for those with physical impairments, supports people to come to terms with bereavement and loss of sight/mobility, provides meaningful activity and opportunities for learning and encourages them to read more.

## 2. Introduction

ebook lending has been offered by public libraries since 2008, however there have been consistent issues in terms of availability of stock, cost and licensing which the Sieghart Review addressed in 2013. In the intervening decade there has been little change in terms of the licensing model used for ebook lending in public libraries and issues of affordability and availability remain.

In 2018 the government extended Public Lending Right to ebooks, which ensured that authors were fairly compensated for lending of their works via ebook. However, research by Libraries Connected suggests that ebook purchases account for a quarter of library budgets and only 14% of issues.

Libraries Connected has been funded by the Arts Council England (ACE) to deliver the eLicensing Project which aims to increase affordability and availability of digital content to public library services by looking at new and existing business models.

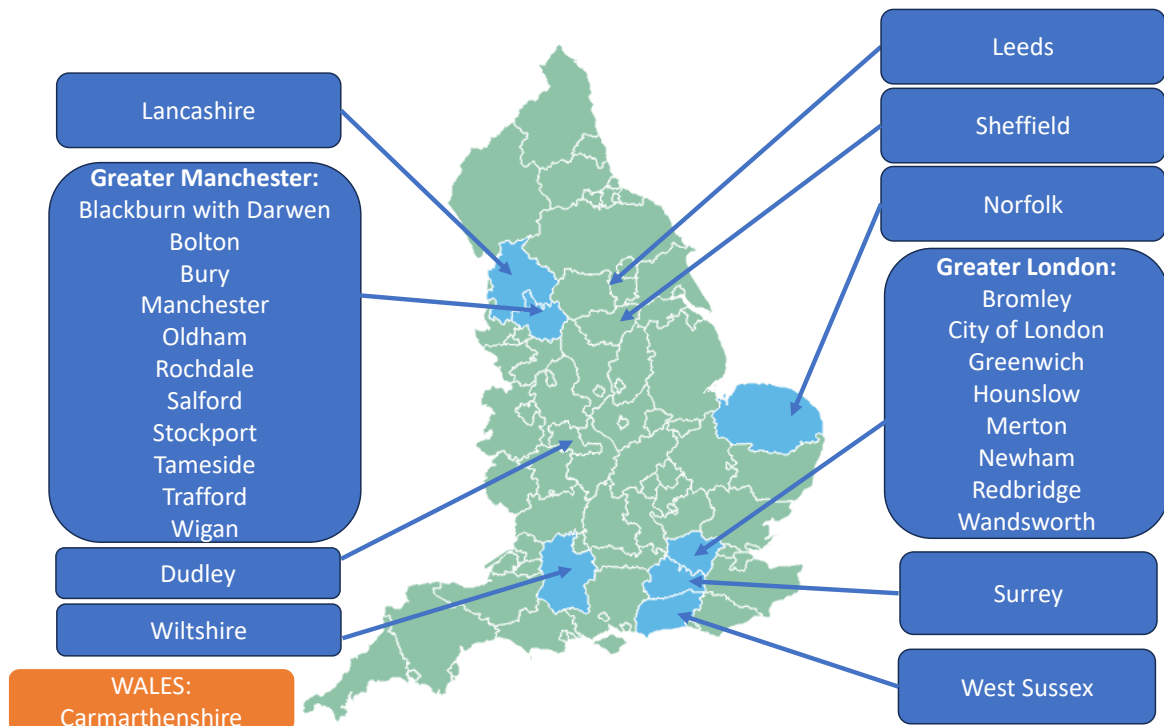
The project objectives are to:

- enable libraries to reach more people with more impact
- improve choice for eborrowers
- improve data flow about ebook lending in libraries
- encourage greater collaboration between aggregators, publishers and libraries around stock
- curation and promotion of authors and books.

The project team is working with the Society of Authors, Booksellers Association, British Library, The Reading Agency, the Publishers Association, publishers and aggregators to ensure as key stakeholders in the publishing eco-system that their views are included in the pilot, where relevant.

A 6-month pilot commenced in March 2024 with 28 library services across England and Wales, publishers and aggregators testing a range of new models for eLending in public libraries.

The following library services are participating in the ebook lending pilot:



Alongside the pilot project, funded by ACE, Libraries Connected commissioned a survey of library users targeted at eborrowers. The purpose of this survey is to yield anonymised data on choices made by eborrowers in a range of different scenarios, exploring the relationship between ebook borrowing and ebook lending.

In particular, it seeks to understand:

- library users' ebook borrowing and ebook buying habits
- the extent to which library e-lending might lead to eborrowers buying books or audio, in physical or e-format, following their interaction with the library offer
- how habits might change depending on the scope and accessibility of the library offer.

This report combines annual data on ebook lending collated by library services in the pilot with two waves of customer surveys completed by library users across the pilot locations and data from 8 in-depth interviews with ebook borrowers to provide a snapshot of ebook lending in England in 2024.

### 3. Method

This report is based on four sources of data:

1. Demographic mapping of active ebook borrowers against the whole library membership by library services participating in the pilot
2. An online survey for library users disseminated by all library services participating in the pilot administered in February 2024
3. A further online survey for library users disseminated in the same way in September 2024
4. Eight in-depth interviews with ebook borrowers with specific demographic characteristics and vulnerabilities, selected from respondents to the second wave survey and via library service recommendation

#### 3.1 Library data

The library data generated by participating library services included:

- Numbers of ebook loans from 1<sup>st</sup> January 2023 – 31<sup>st</sup> December 2023
- Numbers of active ebook borrowers over that time period
- Demographic data about ebook borrowers
- Demographic data about library members as a whole

All library services participating in the pilot were given instructions on how to extract user numbers from the eLending platforms and match them with the Library Management System database. This enabled borrower numbers to be analysed against any demographic information collected by the library service, including (where available):

- Age
- Gender
- Socioeconomic characteristics – this was ascertained by matching postcodes against indices of deprivation using the Ministry of Housing Communities and Local Government's postcode look-up tool<sup>1</sup>
- Ethnicity
- Disability status

Once the mapping was completed, anonymised data was added to a data analysis template supplied to library services, which calculated the percentages of ebook borrowers in the library service with these characteristics.

Care was taken to ensure that no Personally Identifiable Information was transferred out of the library service. No library membership numbers or postcodes were transferred to Independent Mind. The Indices of Deprivation information is generated as a number from one to ten, with one being the most deprived 10% of the UK population and 10 being the least deprived 10%.

This exercise was repeated for the whole registered user database, providing two one-page snapshots for each library service of the characteristics of their ebook borrowers and their library members as a whole.

Across the whole sample it was not possible to generate accurate data on the ethnicity or disability status of either ebook borrowers or library members as a whole, because this data is not routinely

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<sup>1</sup> <https://imd-by-postcode.opendatacommunities.org/imd/2019>

collected by library services. Certain library services also do not collect data on gender, although the sample was large enough to draw some limited evidence of the gender split of library members and ebook borrowers.

Not all library services were able to generate this data:

- Some struggled to engage their Library Management System provider to generate the reports they required
- Others found that working with the whole member database in the Excel template supplied was unwieldy and caused system crashes
- It is also worth noting that the postcode look up tool, which generates indices of multiple generation can only process 10,000 postcodes at a time, which made the process of generating indices for whole library databases extremely time-consuming for large services

Below is a table showing which services were able to provide which data:

Library service	ebook borrower demographic snapshot	Library membership demographic snapshot	eBook borrowing data for control period 1.3.23-31.8.23	eBook borrowing data for pilot period 1.3.24-31.8.24
Blackburn with Darwen	✓	✓	✓	✗
Bolton	✓	✓	✓	✓
Bury	✓	✓	✓	✓
City of London	✓	✓	✓	✓
Hounslow	✓	✓	✓	✓
Lancashire	✓	✓	✓	✓
Leeds	✓	✓	✓	✓
Manchester	✓	✓	✓	✓
Merton	✓	✓	✓	✓
Newham	✓	✓	✓	✓
Norfolk	✓	✓	✓	✓
Oldham	✓	✓	✓	✓
Redbridge	✓	✓	✓	✓
Rochdale	✓	✗	✓	✗
Salford	✓	✓	✓	✓
Sheffield	✓	✓	✓	✓
Stockport	✓	✗	✓	✗
Surrey	✓	✓	✓	✓
Tameside	✓	✓	✓	✓
Trafford	✓	✓	✓	✓
West Sussex	✓	✓	✓	✓
Wigan	✓	✓	✓	✓
Wiltshire	✓	✓	✓	✓
<b>TOTAL COMPLETIONS</b>	<b>23</b>	<b>21</b>	<b>23</b>	<b>20</b>

Where overall library user demographics are compared with ebook demographics, only the data from the 21 services which completed both forms are used. Where ebook lending demographics alone are used, data from all 23 services that completed the ebook snapshot for 2023 is used.

### 3.2 Library user survey (wave 1)

The online survey was conducted between 26<sup>th</sup> January 2024 and 29<sup>th</sup> February 2024. The survey was open to anyone over the age of 18. In total 18,283 responses were received.

The survey content was developed with the input of:

- The eLicensing Project board, which was a group of partners who were tasked with the delivery of the pilot and the research
- The eLicensing National Reference Group, which involved a wider group of voices including Arts Council England, the Publishers Association, the Booksellers Association, the Reading Agency and others<sup>2</sup>
- Heads of Library Services

A specific survey workshop was conducted with the Publishers Association, the Booksellers Association and selected individual publishers to ensure that the questions would answer their queries about the nature of ebook borrowing behaviour.

Questions were included about both ebook borrowing and buying and physical book borrowing and buying, so that it would be as relevant to as wide an audience as possible. This was particularly important due to the constraints that some library services experienced in targeting the survey at ebook borrowers. It was not possible to use the ebook lending platforms to disseminate the surveys and therefore it was anticipated that a proportion of those responding would not be ebook borrowers.

A prize draw was offered, to maximise participation. This included:

- 3 x £100 shopping vouchers
- 3 x £50 book tokens

The book tokens were offered by the Booksellers Association as in-kind support for the project.

Each library service participating in the pilot was given a survey link to promote and disseminate among their membership. Every service took its own approach to promoting the survey, depending on the contact permissions on their database and whether they had a newsletter or similar.

Dissemination approaches included:

- Using QR codes in the library to promote the survey among those visiting
- A targeted mailout to active eborrowers (where permitted)
- Inclusion of invitations to participate in the survey in the regular library e-newsletter (where distributed)
- Invitations to complete the survey via social media
- Inclusion of the survey link on the library webpage
- Other targeted promotion using local authority communication channels or other means

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<sup>2</sup> Membership of the Project Board and Stakeholder Group can be found in Appendix A



Response rates varied across the library services. The maximum number of responses any library service received was 4025 and the minimum was 2.

### 3.2 Library user survey (wave 2)

A second online survey was conducted between 1<sup>st</sup> September 2024 and 30<sup>th</sup> September 2024. The survey was open to anyone over the age of 18. In total 9,188 responses were received.

A prize draw, consisting of 3 x Love 2 Shop vouchers was offered as an incentive to participation. Participants were also asked whether they gave their consent to be contacted for a telephone interview following their completion of the survey.

The survey content was developed in the same way as the baseline survey and replicated several questions to look for change over time. It was decided to include measures of satisfaction with and experiences of specific aspects of physical book borrowing as well as ebook borrowing to contextualise the satisfaction and experience scores that were provided in the initial survey.

The survey was promoted in the same way as the baseline survey. Response rates varied across the library services. The maximum number of responses any library service received was 1678 and the minimum was 1.

This survey provided an opportunity to ask further clarificatory questions based on data and gaps in information that were apparent from the first survey. Due to the smaller sample size, this survey is only referred to where new questions were asked and is identified as the 'post pilot survey' in the information under each chart. The questions this data refers to are primarily:

- Relating to device preference when reading ebooks
- Contextualising satisfaction with ebook borrowing against satisfaction with physical book borrowing

### 3.3 Qualitative interviews with eLending users

In addition to the quantitative surveys with library users, a small number of online or telephone interviews were conducted with ebook borrowers.

The purpose of the interviews to gain more in-depth insight into the impacts of ebook borrowing on certain key audiences and ascertain whether they had noticed any changes in the offer over the course of the pilot and any positive impacts to themselves as eLending users.

The key target audiences for more detailed feedback were identified with the Project Board and included:

- Disabled people and those with long-term illnesses and mental health conditions
- People from minoritised ethnic communities
- People living on low incomes

Initially, library services were invited to nominate individuals from key target audiences they had engaged with about the ebook borrowing offer. Three interviews were arranged in this way.

To supplement this method of recruitment, those completing the final eLending survey online were invited to opt in to being contacted about their experiences of borrowing ebooks. Five interviews were sourced using this approach.

All participants were offered a £25 voucher of their choice as a thank you for their participation.

## 4. Main findings

### 4.2 Prevalence of ebook borrowing

#### Active ebook borrowers as a proportion of library members

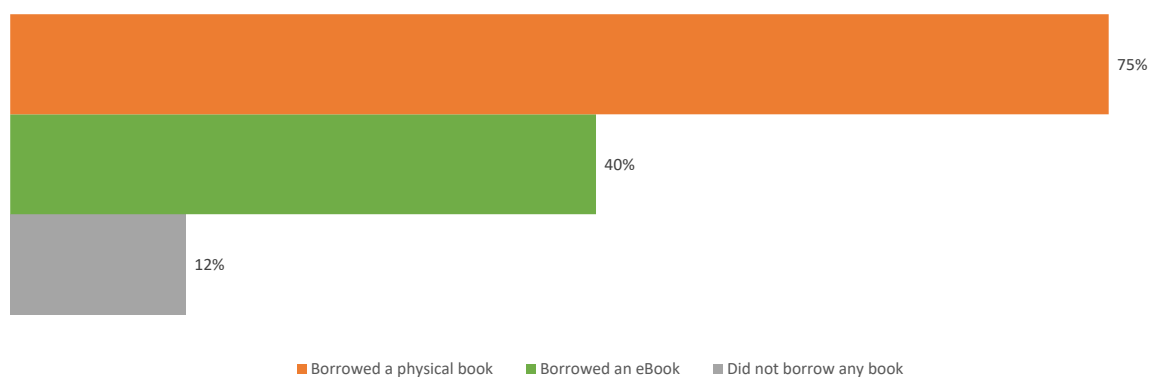
The library service data returns show that an average of 6% of registered library users are ebook borrowers<sup>3</sup>. This varies across services from 2% to 18% of all registered users, but only 5 out of 16 services who returned both datasets showed over 10% of registered users borrowing ebooks.

#### Book borrowing habits

86% of those who responded to the survey had borrowed a physical book or an ebook in the past year.

- 75% had borrowed a physical book
- 40% had borrowed an ebook.

*Chart 1: Survey respondents who have borrowed a physical or ebook in the past year*

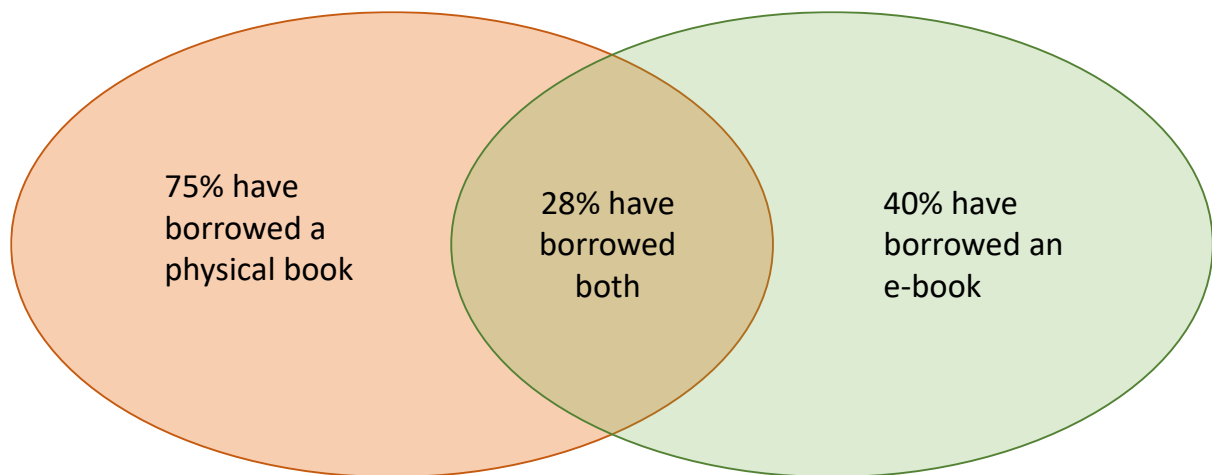


Q5. How many, if any, physical books have you borrowed from your library service in the past year?  
Q7. How many, if any, e-books have you borrowed from your library service in the past year?  
BASE: All (17173)

Across the whole sample, over one quarter of respondents (28%) have borrowed both ebooks and physical books.

<sup>3</sup> Based on the 15 services who completed both returns

Chart 2: Crossover between ebook and physical book borrowing in the past 12 months



Q5. How many, if any, physical books have you borrowed from your library service in the past year?

Q7. How many, if any, e-books have you borrowed from your library service in the past year?

BASE: All (17173)

This crossover breaks down to:

- 38% of physical book borrowers who have borrowed an ebook in the past 12 months
- 71% of ebook borrowers who have borrowed a physical book in the past 12 months.

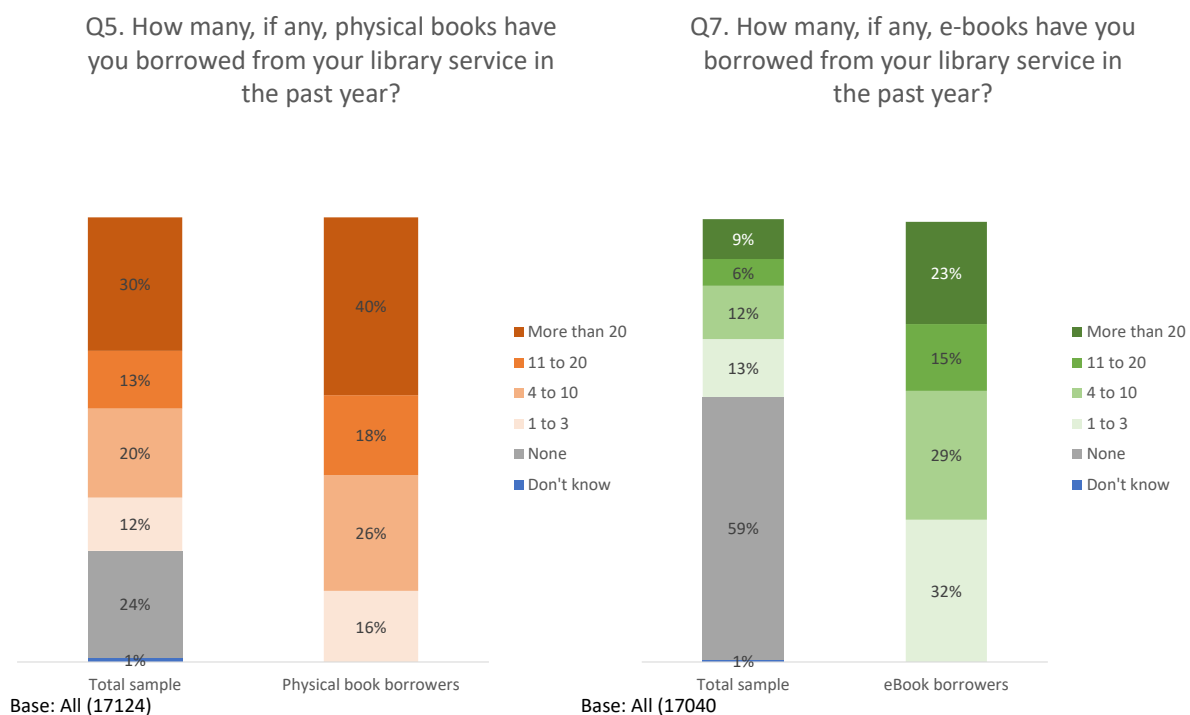
### Rate of borrowing

The library data suggests that on average, active ebook borrowers borrow 11 ebooks per year although this average varies from 7 per user to 22 per user depending on the library service.

In the survey, physical book borrowers are more likely to borrow more books than ebook borrowers:

- Three in ten (30%) of the total sample and 40% of those who borrow physical books say they have borrowed more than 20 physical books in the past year
- Under one in ten (9%) of the total sample and just under a quarter (23%) of those who borrow ebooks say they have borrowed more than 20 ebooks in the past year.

**Chart 3: Rate of borrowing over the past 12 months**



### 4.3 Characteristics of ebook borrowers

According to the library service data, ebook borrowers are more likely than average library members to be:

- Women (58% of ebook borrowers vs 51% of library membership)
- Aged 45+ and particularly aged 55-74
- Less deprived – although ebook lending is relatively evenly spread across the income deciles, lower deciles (1-4) form 28% of all ebook borrowers compared with 39% of all library members.

**Chart 4: Library service data on demographic characteristics of ebook borrowers in comparison with the total membership**

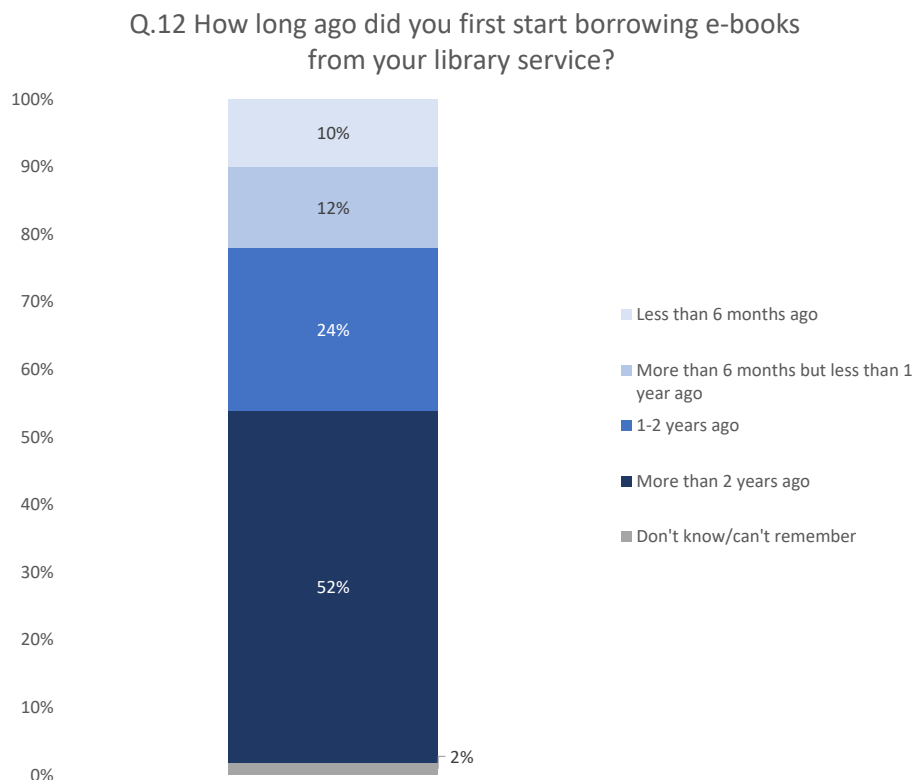
		% of total library membership	% of ebook borrowers
Gender	Male	37	23
	Female	51	58
	Other	0	0
	Transgender	0	0
	Unknown	3	1
	Prefer not to say	0	0
	Blank	8	17
Age	Under 5	6	1
	5-10	15	3
	11-17	13	6

	18-24	7	5
	25-34	10	13
	35-44	13	13
	45-54	9	14
	55-64	7	14
	65-74	7	16
	75+	6	10
	Unknown	8	4
Index of deprivation decile	1	9	6
	2	9	6
	3	11	8
	4	10	8
	5	10	9
	6	10	10
	7	9	11
	8	9	12
	9	11	12
	10	12	14

### Length of time as ebook borrowers

Over half (52%) of the ebook borrowers in the survey sample have been borrowing ebooks for over 2 years, while the remainder have either been borrowing for 1-2 years (24%) or have started borrowing in the past year (22%).

Chart 5: length of time borrowing ebooks



The longer people have been borrowing ebooks the heavier user they tend to be:

- 19% of those who have been borrowing ebooks for over 2 years borrowed more than 10 ebooks in the past year
- only 12% of those who have been borrowing ebooks for less than 2 years borrowed more than 10 ebooks in the past year.

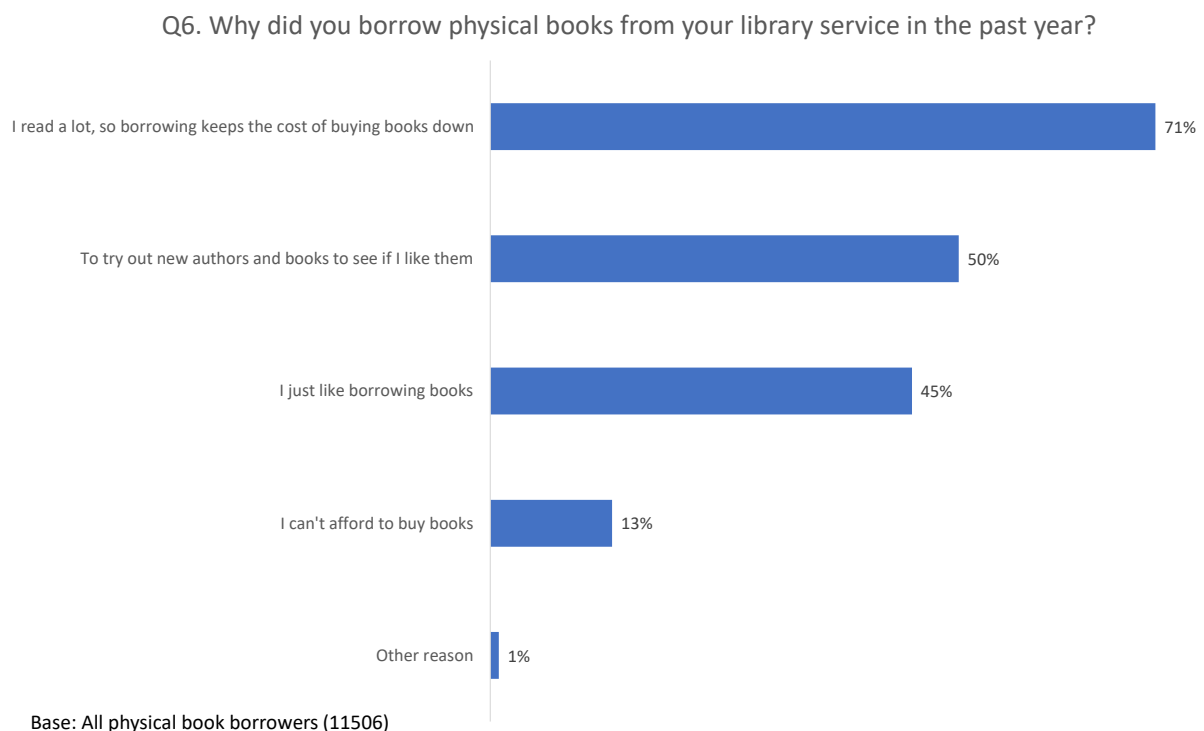
#### 4.4 Reasons for borrowing physical and ebooks (survey data)

In the survey, physical and ebook borrowers were asked about their reasons for borrowing. They were able to select as many reasons as they wished.

##### Reasons for borrowing physical books

Seven in ten (71%) physical book borrowers say that they borrow books to keep the cost down. Half (50%) say they borrow to try out new authors and books.

*Chart 6: reasons for borrowing physical books*



Only 13% borrow physical books because they can't afford to buy them, but this is more prevalent among certain groups:

- 20% of those on incomes of £20,000 or less borrow for this reason
- 20% of those from ethnic minority groups borrow for this reason.

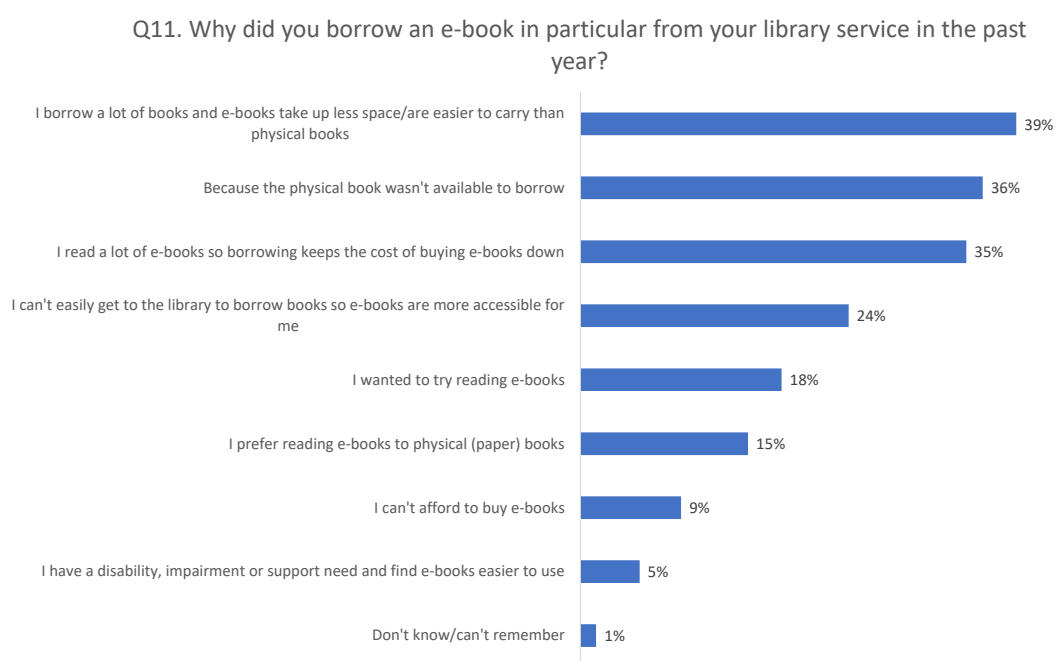
## Reasons for borrowing ebooks

The most common reason for borrowing ebooks is because they take up less space and are easier to carry than physical books – 39% of ebook borrowers selected this reason. Those who also buy a lot of ebooks are more likely than average to choose this reason (45%), which suggests that ebook borrowing is primarily related to format preference.

The second most common reason for borrowing ebooks was because the physical book wasn't available to borrow, with over a third of ebook borrowers (36%) choosing this reason.

The next most common reason for borrowing ebooks is similar to the most common reason for borrowing books – people borrow because they read a lot and this keeps the costs down. However, only 35% of ebook borrowers chose this reason, compared with 71% of physical book borrowers.

Chart 7: reasons for borrowing ebooks



Base: All e-book borrowers (5986)

In addition, just under a quarter of ebook borrowers (24%) borrow ebooks because they can't easily get to the library. This reason is more prevalent among certain groups:

- 31% of disabled ebook borrowers borrow ebooks for this reason
- 29% of those aged 18-35 borrow ebooks for this reason.

Fewer people who borrow ebooks say they do so because they can't afford to buy them than those who borrow physical books (9% of ebook borrowers vs 13% of physical book borrowers), but this reason is also more prevalent among certain groups:

- 45% of those from ethnic minority groups borrow ebooks for this reason
- 17% of those who have incomes of under £20k per annum borrow ebooks for this reason
- 11% of those who identify as disabled borrow ebooks for this reason.

ebook borrowing also appears to be linked to trialling the ebook format: 18% of those who borrow ebooks say they are borrowing in order to try reading ebooks. Certain groups were more likely to select this reason:

- 23% of those aged 18-35 borrow ebooks for this reason
- 22% of those from ethnic minority groups borrow ebooks for this reason.

#### 4.5 Reasons why people start borrowing ebooks (qualitative research findings)

There were three main motivations among the eight people surveyed who borrow ebooks:

- Mobility issues/disability and inability to go to the library easily
- Recommendations from friends and family members
- Having started borrowing ebooks during the pandemic and carrying on with this behaviour since then
- Wanting to borrow a specific title or genre that was not available in physical stock

One person interviewed had been set up with the ebook app by a volunteer from the Home Library Service as they were not able to get to the library because of their mobility issues. Three participants in the research were experiencing sight loss and used ebooks and eAudio as accessible formats for reading with their condition.

*"Someone lent me a book, A Gentleman in Moscow, and I started to read it, but the print was so small, even with my reading glasses that I gave it up and then I went online and went on a 12 week waiting list to get it as an ebook."* (Man aged 75+, Wiltshire)

One person mentioned receiving a talk from their local library service at a workshop for people experiencing sight loss which was offered by the RNIB in their area; this talk mentioned the library's eLending offer. They then went to the library where they downloaded the app onto their device and helped with the set-up.

*"One of the courses that I went on, it's called Living With Sight Loss, was in the Civic Centre and it was over two weeks. During the course, during the day, the organisers invited different speakers to tell us about what they had to offer. One was from the library and that was very helpful. They said 'Did you know about Borrowbox?'"* (Woman, 65-74, disabled, low income, Hounslow)

Word-of-mouth is a key reason for people looking into borrowing ebooks from their library. Three out of the eight qualitative participants had been recommended to try borrowing ebooks by friends, family or book group members. Several of those interviewed said that they also promoted the service now they were using it, because they found it to be so easy to use and convenient.

Several of those interviewed as part of the research started borrowing ebooks during the pandemic. They had been regular library users before the pandemic and wanted an alternative while the library was closed. Most had carried on reading ebooks from the library rather than returning to using print books.

*"We don't physically go to the libraries very much these days. I think Covid knocked it on the head, unfortunately."* (Man, 65-74, long term condition, low income, Wigan)

One person had borrowed an ebook because the physical book was out on loan and she had seen that the ebook was available to borrow when browsing the catalogue. Another person saw information about the ebook offer on a receipt they printed for their physical book loan in the library. Once they explored it they found that the ebook selection of the specific type of books they like to read was better from their library than the physical collection:

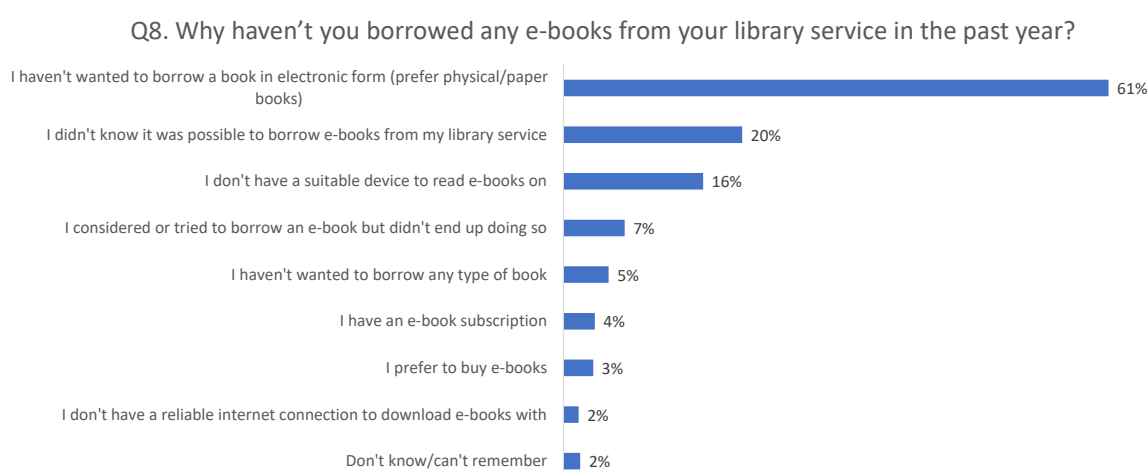


*“[the ebook collection had] a wider range, more recent publications, the newer books from some of the authors that I follow, so that was quite good.” (Man, 45-54, minoritised ethnic community, Blackburn)*

#### 4.6 Reasons why people do not borrow ebooks (survey data)

Those who do not borrow ebooks from their library service were asked why not. The most common reason, selected by more than three in five of those responding (62%) was that they prefer physical or paper books. This suggests that when library users are deciding whether to borrow a physical or ebook the primary driver is format preference.

*Chart 8: reasons why people have not borrowed ebooks*



Base: non-eBook borrowers (9938)

One in 5 (20%) who hadn't borrowed ebooks said this was because they were not aware that it was possible to borrow ebooks from the library service. This was more prevalent among certain groups:

- 28% those from ethnic minority groups who hadn't borrowed ebooks were not aware they could
- 26% of those aged 18-35 who hadn't borrowed ebooks were not aware they could
- 24% of those aged 35-54 who hadn't borrowed ebooks were also not aware they could.

The next most common reason for not borrowing ebooks was not having a suitable device to read them on – 16% selected this reason. This was more common among:

- Younger people – 19% of under 35s said they didn't have a suitable device
- People on low incomes – 19% of those earning under £20k p.a. said they didn't have a suitable device.

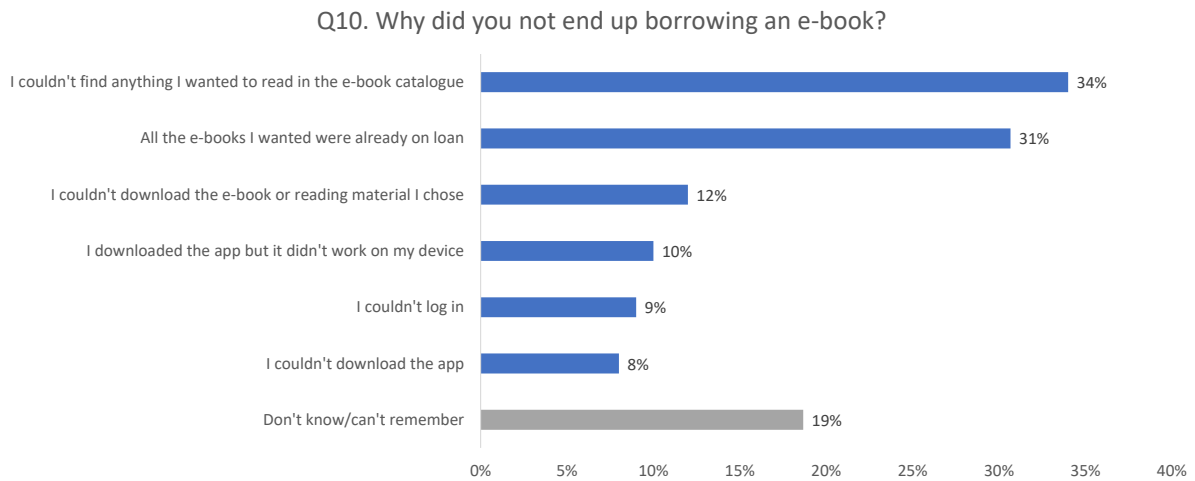
#### **Barriers to borrowing ebooks**

Only 7% of non-ebook borrowers said they had tried to borrow an ebook but hadn't ended up doing so, however this still formed a substantial base of 298 people to explore barriers to borrowing ebooks.

The most common barriers to borrowing ebooks among those who tried were:

- Not being able to find anything they wanted to read in the catalogue (34%)
- All the ebooks they wanted being already on loan (31%).

*Chart 9: Reasons why people who tried to borrow an ebook did not end up borrowing*



Base: All who tried to borrow an e-book but couldn't (298)

A minority amongst this 7% encountered technical difficulties such as in downloading the ebook (12%), the app not working on their device (10%) and not being able to download the app (8%) or log in (9%).

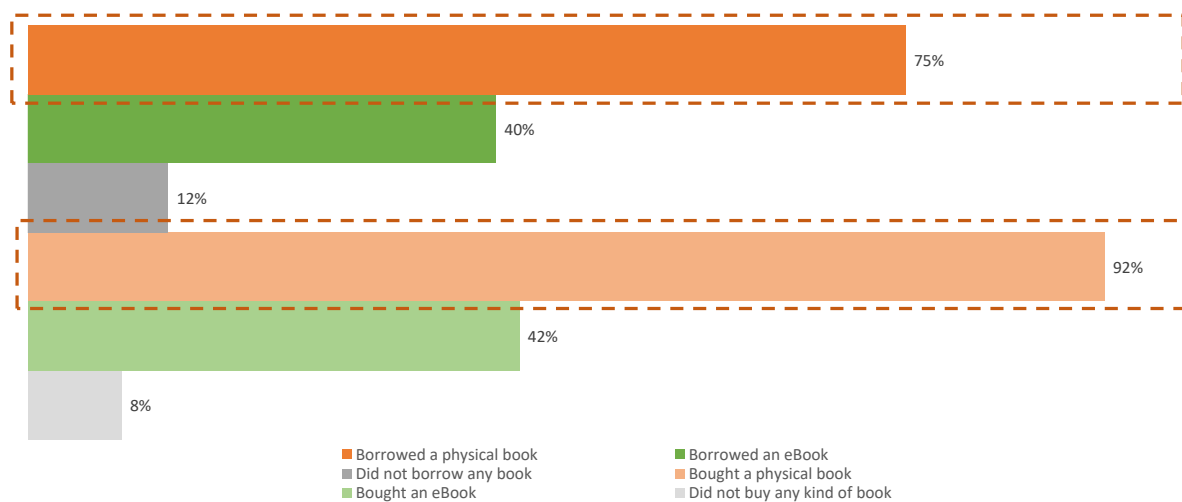
## 4.7 Book buying and its relationship to borrowing

### Book buying habits

In the past year 92% of those responding to the survey had bought physical books. This means that participants in the survey were more likely to have bought at least one physical book than borrowed a physical book in the past year.

ebook buying rates are the same as ebook borrowing rates overall: 40% have borrowed at least one ebook and 42% have bought at least one ebook

Chart 10: Prevalence of physical book and ebook buying vs physical book and ebook borrowing

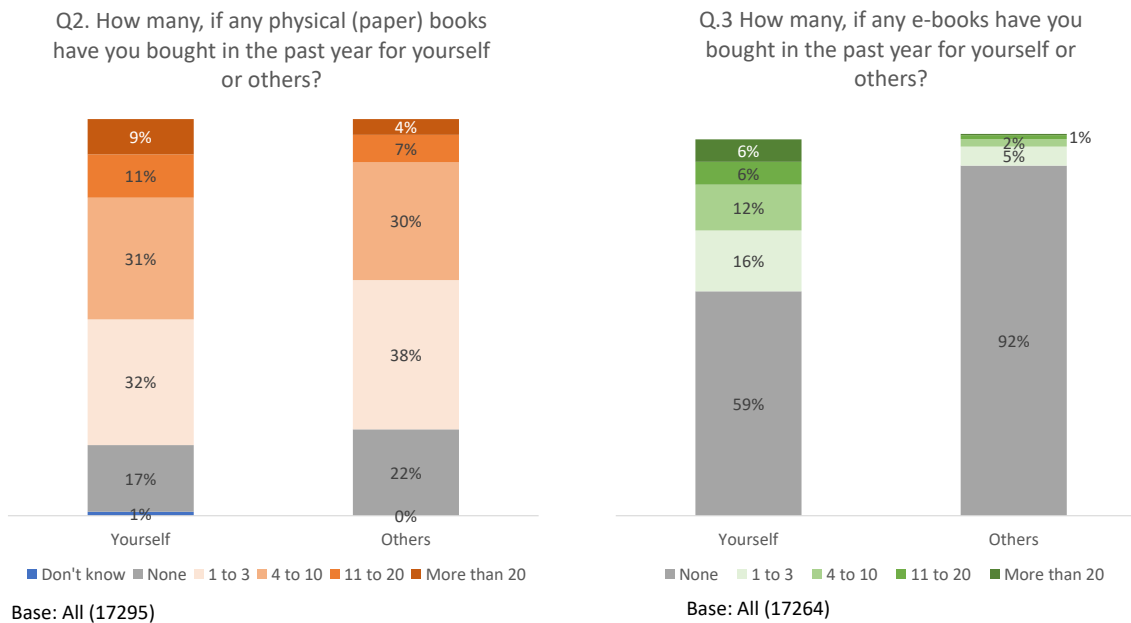


Q2: How many, if any physical (paper) books have you bought in the past year for yourself or others?  
Q3: How many, if any, e-books have you bought in the past year for yourself or others?  
Q5: How many, if any, physical books have you borrowed from your library service in the past year?  
Q7: How many, if any, e-books have you borrowed from your library service in the past year?  
BASE: All (17250)

### Rates of book buying

63% had bought more than three physical books for themselves or others and 26% had bought more than three ebooks. However, ebook buyers were much more likely to have bought for themselves rather than others, with 40% buying for themselves and only 7% buying for others.

**Chart 11: physical and ebook purchases in the last 12 months**



12% of those responding to the survey had an ebooks subscription, however having an ebook subscription did not mean that people were not buying ebooks. In fact, it made them more likely to buy individual ebooks:

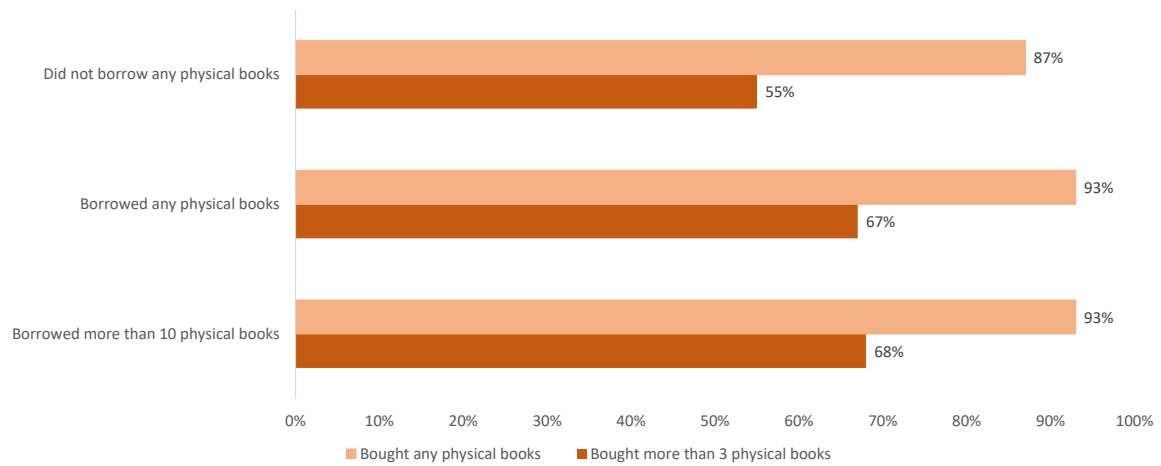
- 81% of ebook subscribers have also bought e-books in the past year
- 62% of ebook have bought more than 3 e-books in the past year.

**Relationship between borrowing and buying**

The survey data suggests that those who borrow physical books are more likely to buy physical books than those who do not borrow them. It also shows a positive correlation between high rates of borrowing and high rates of book purchase i.e. that those who borrow more books also buy more books:

- 93% of those who borrowed physical books in the past 12 months also bought physical books, compared with 87% of those who did not borrow
- 67% of those who borrowed physical books bought more than 3 physical books, compared with 55% of those who did not borrow
- 68% of those who borrowed more than 10 physical books bought more than 3 physical books.

*Chart 12: correlation between borrowing and buying physical books*

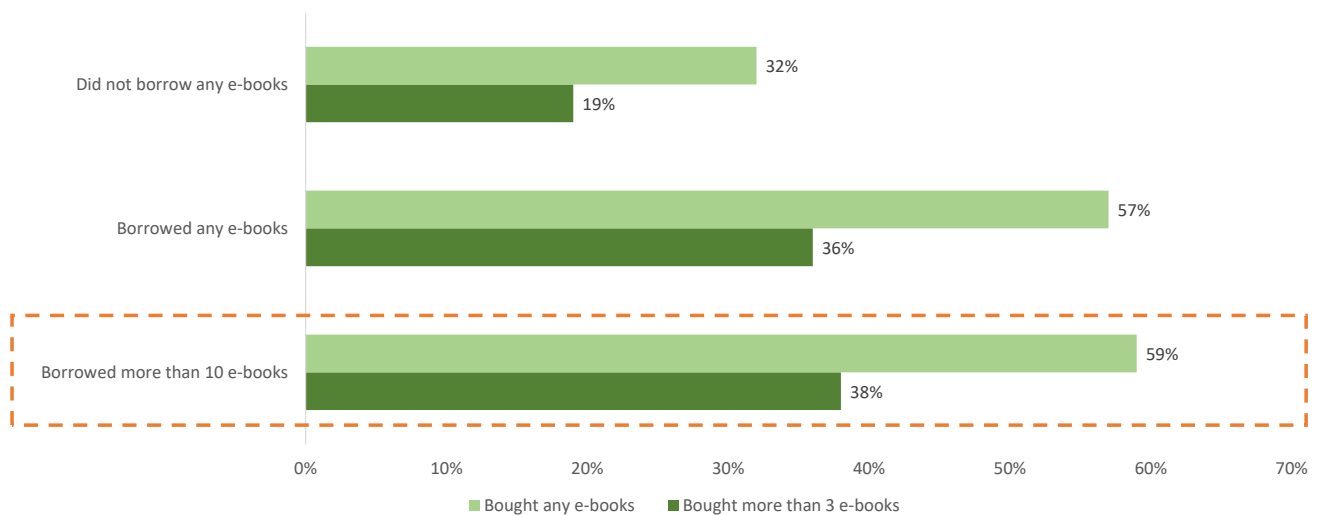


Q2: How many, if any physical (paper) books have you bought in the past year for yourself or others?  
 Q5: How many, if any, physical books have you borrowed from your library service in the past year?  
 Base: All (17250)

The positive correlation between borrowing and buying is even more marked among those who borrow ebooks:

- only 32% of those who did not borrow ebooks in the past 12 months bought them, whereas 57% of those who borrowed ebooks also bought them
- 59% of those who borrowed more than 10 ebooks also bought them
- only 19% of those who did not borrow ebooks say they bought more than 3 ebooks in the past year, whereas 38% of those who borrowed more than 10 ebooks bought more than 3 ebooks.

*Chart 13: correlation between borrowing and buying ebooks*



Q3: How many, if any, e-books have you bought in the past year for yourself or others?  
 Q7: How many, if any, e-books have you borrowed from your library service in the past year?  
 BASE: All (17089)

## Changes in buying habits since borrowing ebooks

The preceding sections on the relationship between book borrowing and buying are based on correlation analysis of separate questions about book borrowing and buying habits. ebook borrowers were also directly asked to reflect on any changes in their physical or ebook buying habits since they have started borrowing ebooks.

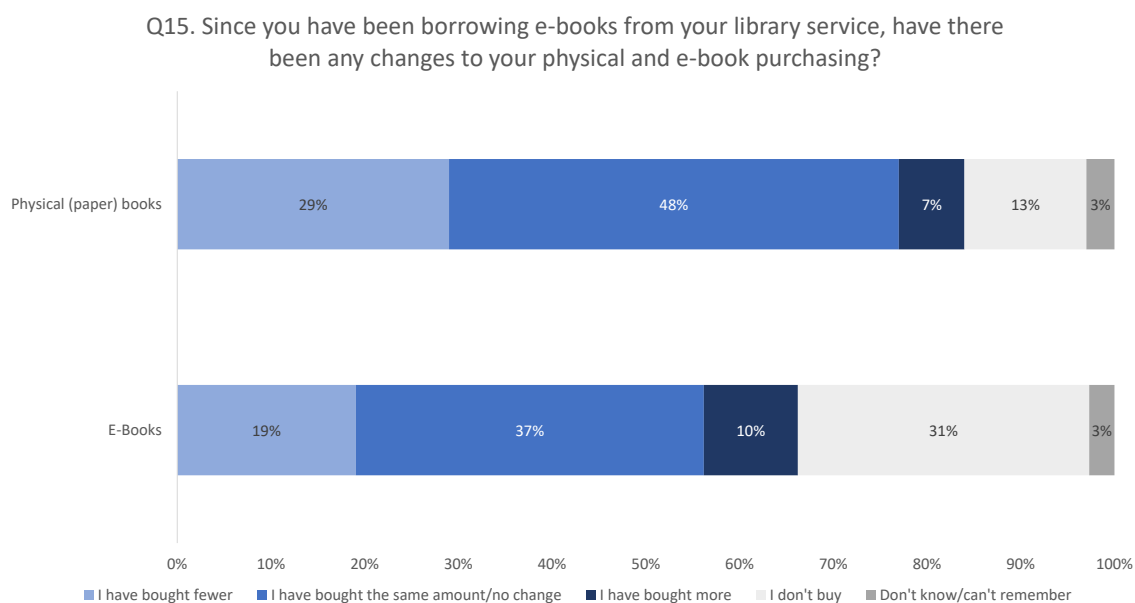
The majority felt that there had been no change in their habits. This includes:

- 48% who said that they buy the same amount of physical books and 13% who don't buy physical books
- 37% who report buying the same amount of ebooks and 31% who don't buy ebooks.

Of those who reported a change:

- 19% said they buy fewer ebooks while 10% buy more
- 29% said they had bought fewer physical books while 7% said they buy more

Chart 14: perceptions of changes in book and ebook purchasing since borrowing ebooks



Base: All e-book borrowers (6528)

These findings are based on borrower's perceptions of their changing buying habits, however more than 50% of ebook borrowers have been borrowing for more than 2 years, which means that their recollection of previous habits may not be reliable. In addition, the evidence in the previous section about borrowing and buying habits show that there is a positive correlation between high levels of ebook borrowing and high levels of ebook purchasing. The responses to this question should therefore be interpreted with reference to this analysis.

## Other impacts from borrowing ebooks

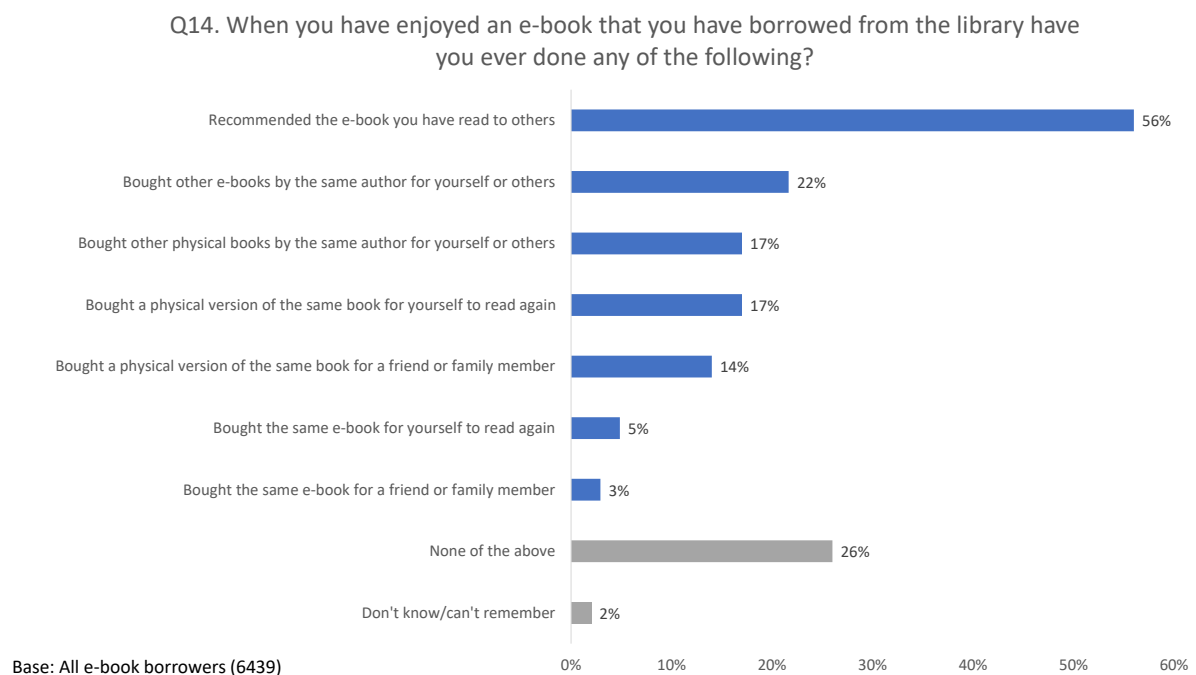
Further to these analyses of the impact of ebook lending on buying in general, ebook borrowers were also asked about the direct impact of reading an ebook they have borrowed on a range of behaviours.

Over half (56%) of ebook borrowers said they have recommended an ebook they have borrowed to others. Younger people are particularly likely to have recommended an ebook they have borrowed, nearly two-thirds (64%) have recommended an ebook they have borrowed to others.

More than one in five (22%) said they had bought other ebooks by the same author for themselves or others and 17% said they had bought other physical books by the same author for themselves or others.

17% said they had bought a physical version of the same book to read again and 5% said they had bought the ebook to read again themselves. 14% had bought a physical version of the same book for a friend or family member and 3% had bought the ebook for a friend or family member.

*Chart 15: Impacts related to reading ebooks borrowed from the library service*



These findings suggest that ebook borrowing can be a useful source of market development for publishers, both through recommendation to others and through readers finding authors they enjoy whose work they then go on to buy.

### **Qualitative evidence on the relationship between ebook borrowing and buying**

Most qualitative participants also bought books in different formats. Those who did not buy books cited not being able to afford the expense and had incomes of less than £16,000.

For those who bought books it was because it was an author they were particularly interested in and whose books they knew they would enjoy or want to buy again. Most bought ebooks, eAudio and physical books but there was a mention of the cost of ebooks and eAudio being a barrier compared to physical books.

*"I obviously I still use Kindle and Audible to buy books, so when I do that I go for authors that I know I'm going to enjoy the books from a genre that I know I'm going to enjoy." (Woman, 45-54, Wigan)*

*“I would tend to buy the physical book over the audiobook, even though I wanted to experience in the audio book, it would put me off. The price is quite expensive. I don’t mind paying more for a premium product like a hardback book. The author that I’m reading... I bought it in hardback because I didn’t want to wait for the paperback version.”* (Man 45-54, Blackburn)

Those who bought ebooks often looked for offers, although some bought new releases of their favourite authors.

*“I know there’s a new Christmas book coming up by Heidi Sway and I just always get Heidi Sway books. They’re easy to listen to and I’ve already pre-ordered it on order Audible.”* (Woman 45-54, Wigan)

Some of those who had bought before starting to borrow ebooks stated that they now bought fewer ebooks than before. However, all felt that they were reading more books than they had previously and that they would not have bought most of the books that they were reading on the eLending app.

*“I only buy ebooks on offer, and I check whether it’s available on Libby first. I have a subscription to Audible for specific titles with a good narrator and which are soothing to help me go to sleep.”* (Woman 55-64, disabled, Norfolk)

#### 4.8 How people prefer to read ebooks

Some new questions were added to the post-pilot survey in order to find out which devices people use for ebooks when they are borrowing and buying them.

When people borrow ebooks, they read them on a wide range of devices, including smartphones, tablets, ebook readers, laptop and desktop computers. Of these, the smartphone is the device used by the greatest number of people (62%). However, when asked which device they prefer to read ebooks they have borrowed on, tablets are the most popular, with 41% preferring to read on a tablet, ahead of smart phones (29%).

People who are more likely than average to prefer to read ebooks they have borrowed on a tablet include:

- men (48%)
- those earning under £20,000 p.a. (45%)
- those aged 55+ (56%)

People who are more likely to prefer to read ebooks they have borrowed on a smartphone include:

- those aged under 35 (43%)
- those from minoritised ethnic communities (37%)

When asked which device they prefer to read ebooks they have bought on, the results are quite different, with 32% preferring to read on an ebook reader, followed by 21% on a smartphone.

Those more likely to prefer to read ebooks they have bought on an ebook reader:

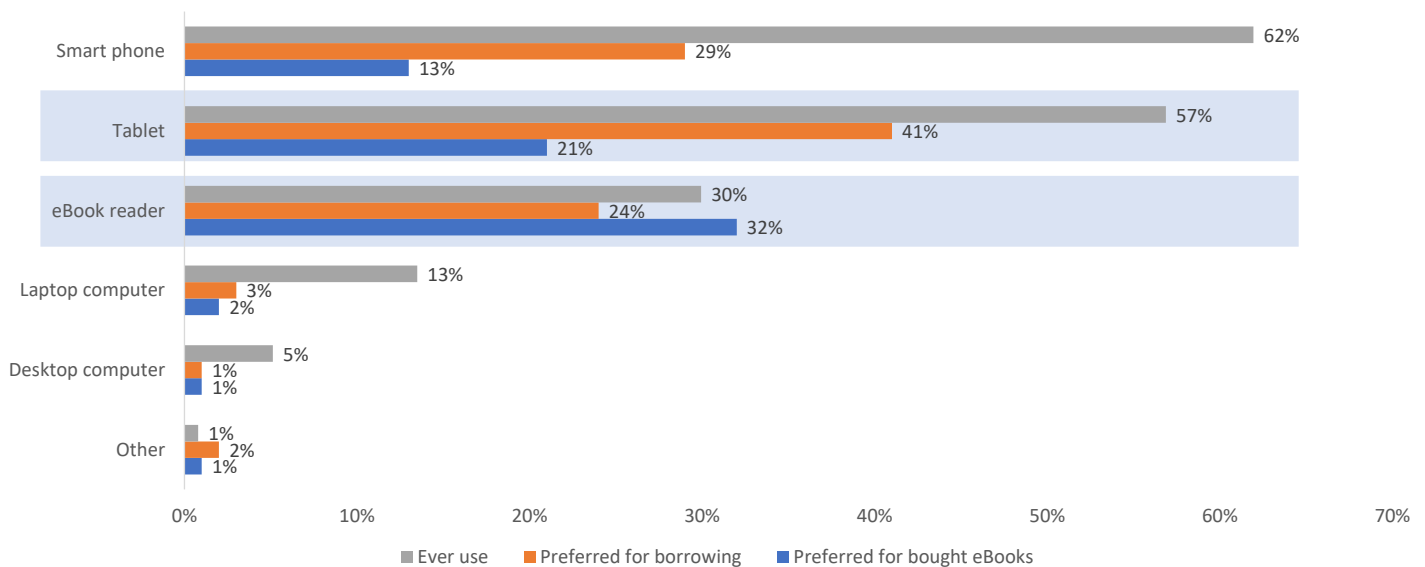
- earn over £40,000 p.a. (40%)
- are aged under 35 (40%)

Those preferring smartphones are more likely:



- to be aged 55+ (29%)
- to earn under £20,000 p.a. (24%)

Chart 16: Preferred devices for reading ebooks



Q19. Which of the following kinds of device do you ever use to read eBooks that you have borrowed?

Q20. What is your preferred/favourite device to read eBooks that you have borrowed?

Q21. What is your preferred/favourite device to read eBooks that you have bought?

BASE: All eBook borrowers post-pilot survey (3915)

#### 4.9 Qualitative evidence on ebook borrowing behaviours

Participants in the qualitative research reported two main impacts on their reading behaviour of using the ebook borrowing app:

- Reading more
- Trying out new authors or genres that they would not choose to buy

ebook borrowers report being more adventurous and trying out titles they would not otherwise have read.

*"I think because it's free, it allows me to be a bit more open-minded to what I choose. So in the past I know what I like and I would stick with that... I just like the fact that it's allowed me to be a bit more adventurous and to read things that I know I wouldn't buy; I wouldn't buy a book of short stories, but I will read a book of short stories from the library service."* (woman, 45-54, Rochdale)

*"I am a bit fussy. I find if I get a book out and if, after the first or 12 pages, I don't think this is going to be for me, I just return it and look again."* (man, 75+, Wiltshire)

In the qualitative research, most of those who use the eLending service report reading more, and in a wider range of formats (ebook, eAudio, ePress), than previously. Most borrow ebooks alongside physical books, while only one would only choose ebooks if a physical book is unavailable.

*"[If I didn't have access to eBorrowing] I would probably read less and, yeah, it'd probably narrow down my reading choices."* (woman, 45-54, Rochdale)

One person mentioned that they now tend to use the ebook lending app to look for information about topics they are interested in, rather than searching the internet.

*“For instance, mindfulness... instead of reverting just to the internet, you're more willing to look within the app to see if you can find that book, find that whole thing, find something out about that.”* (Man, 45-54, minoritised ethnic community, Blackburn)

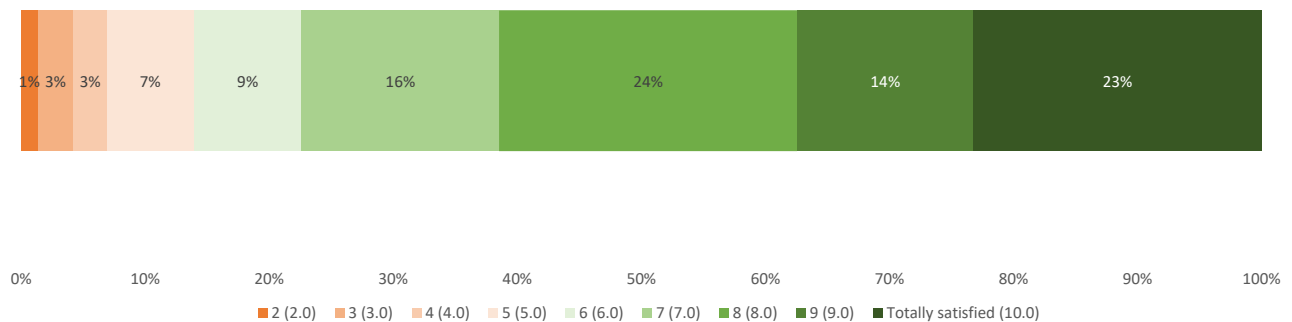
#### 4.10 Experience of ebook borrowing

##### Satisfaction with ebook borrowing

Overall, ebook borrowers are satisfied with the service and give it a mean score of 7.7/10.

Chart 17: Overall satisfaction with ebook borrowing

Q16. Overall, how satisfied are you with your library service's e-book borrowing service? on a scale of 0-10, where 0 = not at all satisfied and 10 = totally satisfied?



Base: All e-book borrowers (6439)

Within the sample, certain sub-groups were particularly satisfied:

- Younger people –those aged 18-35 gave a mean score of 7.9
- On low incomes –those earning £20k p.a. or less gave a mean score of 7.9.

##### Satisfaction with specific aspects of the ebook borrowing experience

ebook borrowers were then asked about their satisfaction with a range of different aspects of the ebook borrowing experience. This revealed varying levels of satisfaction with certain aspects of the experience.

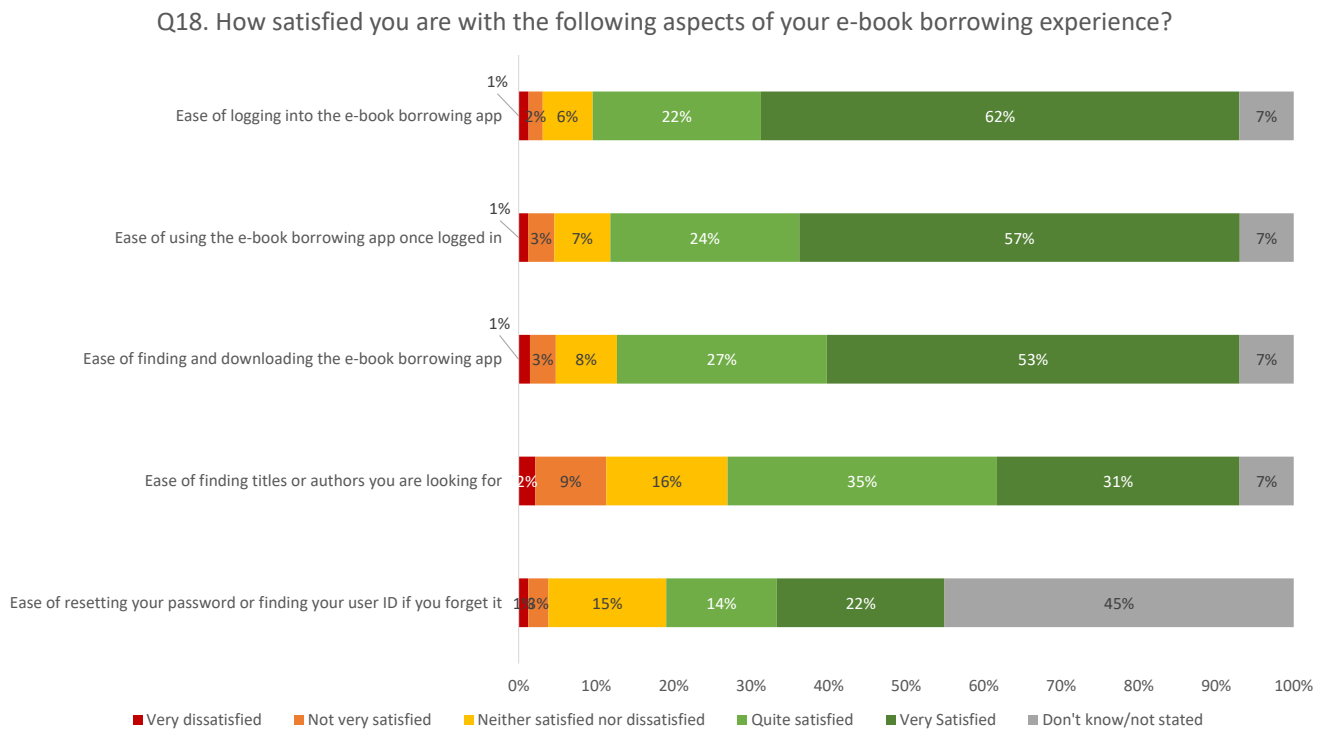
People were most likely to be satisfied with all aspects of the app experience, especially:

- Ease of logging in (84% were quite satisfied or very satisfied)
- Ease of using the app once logged in (81% were quite satisfied or very satisfied)
- Ease of finding and downloading the app (80% were quite satisfied or very satisfied)

They were also generally satisfied with the ease of finding authors and titles they were looking for, although only 66% were quite satisfied or very satisfied and 11% were not very satisfied or very dissatisfied with this aspect of the experience.

Fewer people were able to comment on the ease of resetting a password or User ID if forgotten, but only 4% expressed dissatisfaction with this aspect (7% of those who felt able to comment) while 36% were quite or very satisfied (65% of those who felt able to comment).

*Chart 18: Specific aspects of ebook borrowing experience with high satisfaction rates*



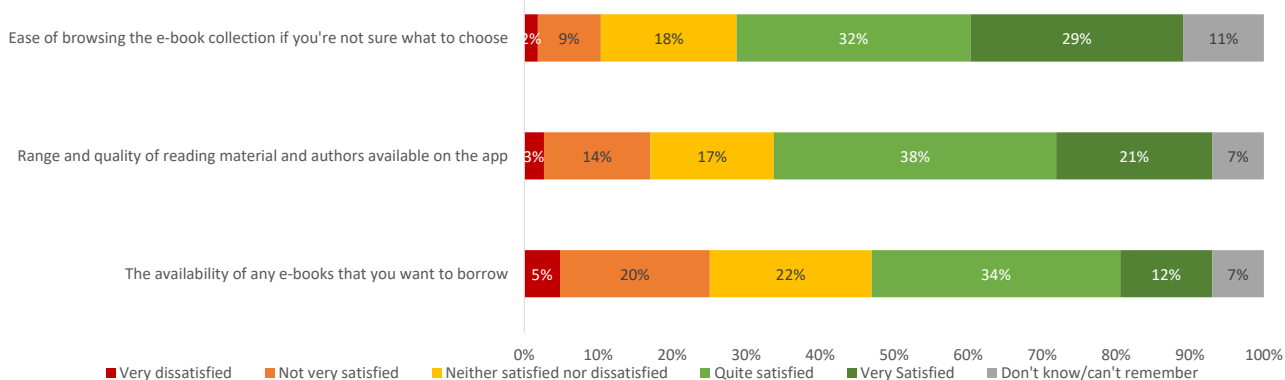
However, some aspects of ebook borrowing had generally lower satisfaction rates. These included:

- Ease of browsing the ebook collection if not sure what to choose (61% were quite or very satisfied and 11% were not very satisfied or very dissatisfied)
- Range and quality of authors available on the app – only 59% were quite or very satisfied and 17% were not very satisfied or very dissatisfied
- Availability of ebooks – only 46% were quite or very satisfied and 25% were not very satisfied or very dissatisfied.

This suggests that the main issues in terms of borrower satisfaction with ebook lending are the range and availability of titles.

*Chart 19: Specific aspects of ebook borrowing experience with lower satisfaction rates*

### Q18. How satisfied you are with the following aspects of your e-book borrowing experience?



Base: All e-book borrowers (6439)

### Qualitative research findings about the experience of ebook borrowing

All those who took part in the research said that they found it easy to download and use the app. Some had received assistance from library staff, but most had been able to download and access the app by themselves.

*"Absolutely easy, it is idiot proof, honestly. It's really, really good. I love it."* (Woman, 65-74, disabled, low income, Hounslow)

*"I can't recall it being a struggle to sign up to get onto it, to negotiate how find authors, borrow books, return them. It all seemed quite straightforward really."* (Man, 65-74, long term condition, low income, Wigan)

Most also enjoy the experience of browsing the app and selecting titles to read, either based on book covers or synopses.

*"I tend to look at the lists where you can look at featured books or genres and new releases and such, and I'll have a scroll through. Those book covers are very telling. I can look at a book cover and think, 'no, I don't want tha'. And I can look at a book cover without even having gone into it and say, 'yes, I'll give that a try'. And it being beautifully coloured and on an easily scrollable screen, I don't tend to find it difficult."* (Man, 65-74, long term condition, low income, Wigan)

*"What they'll do is they'll highlight certain books so they'll be a bit prominent when you look into the page. The new books that are out, you'll highlight those books and they will immediately grab your attention."* (Man, 45-54, minoritised ethnic community, Blackburn)

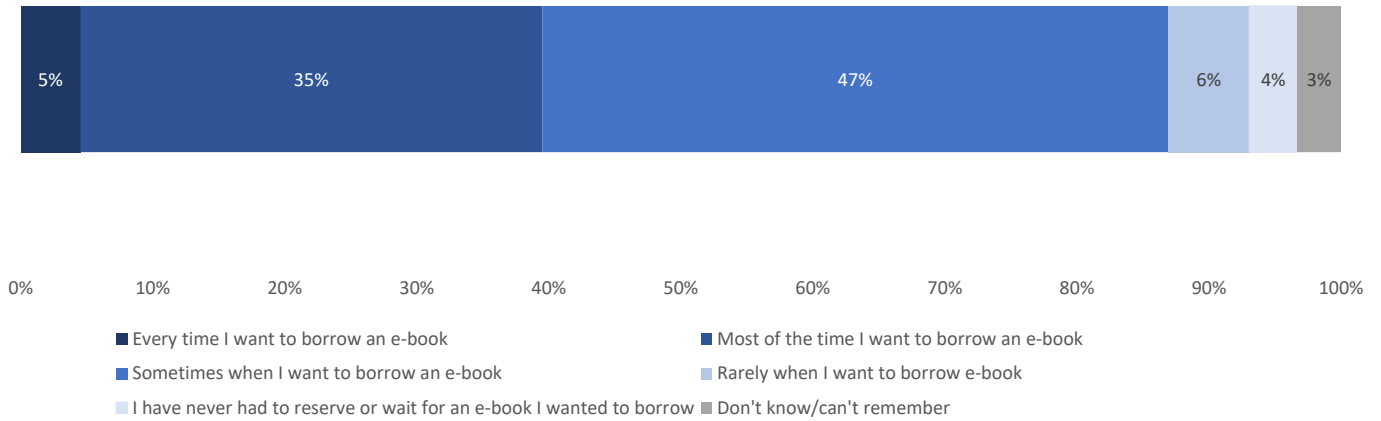
However, some preferred to use the search function, as they found it difficult to find titles they enjoyed through the curated collections and carousels. There were some suggestions of improving browsing by using recommendation-type algorithms similar to Netflix.

### Experience of ebook availability

Only 10% of ebook borrowers say they have never or rarely had to reserve or wait for an ebook. 4 in 10 (40%) say that they have to wait for a book every time or most of the time when they want to borrow an ebook.

Chart 20: Borrowers' experiences of ebook availability

Q19. How often, if at all, was an e-book you wanted to borrow not immediately available as it was already on loan?



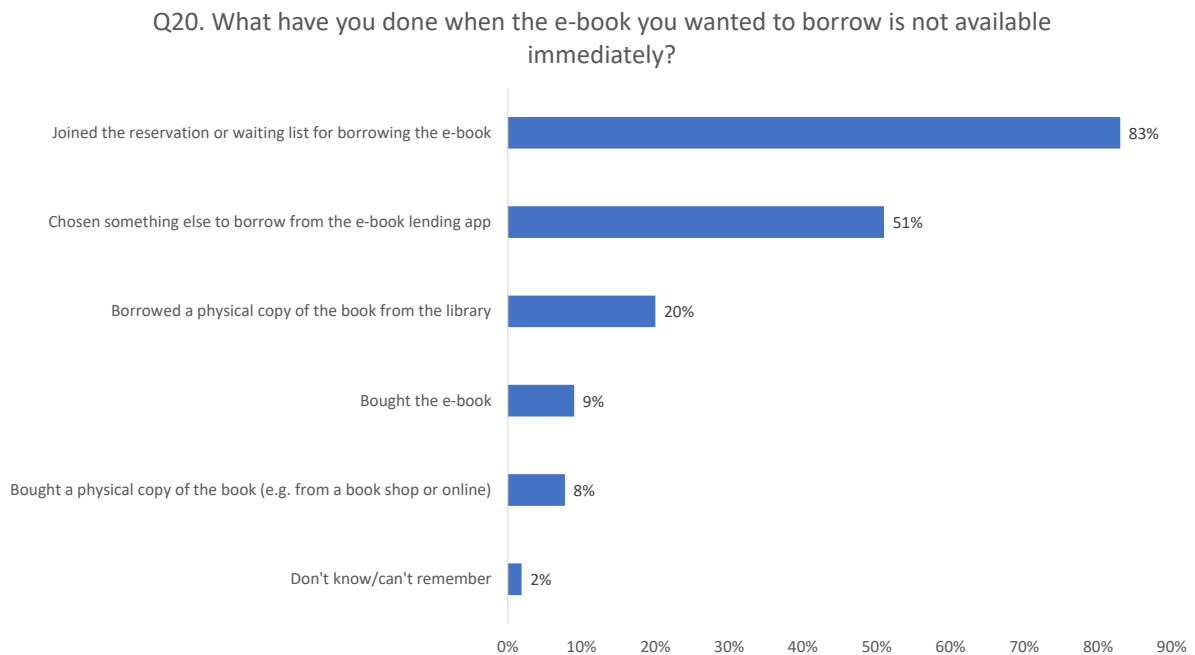
Base: All e-book borrowers (6521)

When the ebook that borrowers want to borrow is not available on the app, the vast majority (83%) have joined the reservation or waiting list. Half (51%) have chosen something else to borrow on the app.

Only one in five people (20%) have borrowed a physical copy from the library, suggesting that there is a strong format preference among ebook borrowers: when they want to borrow, they want to borrow an ebook.

Equally, only one in ten (9%) have bought the ebook or a physical copy of the book instead. Although ebook borrowers do buy ebooks, when they have decided that they wish to borrow, they don't switch back to buying on that specific occasion.

**Chart 21: borrower behaviour when an ebook is not available to borrow**



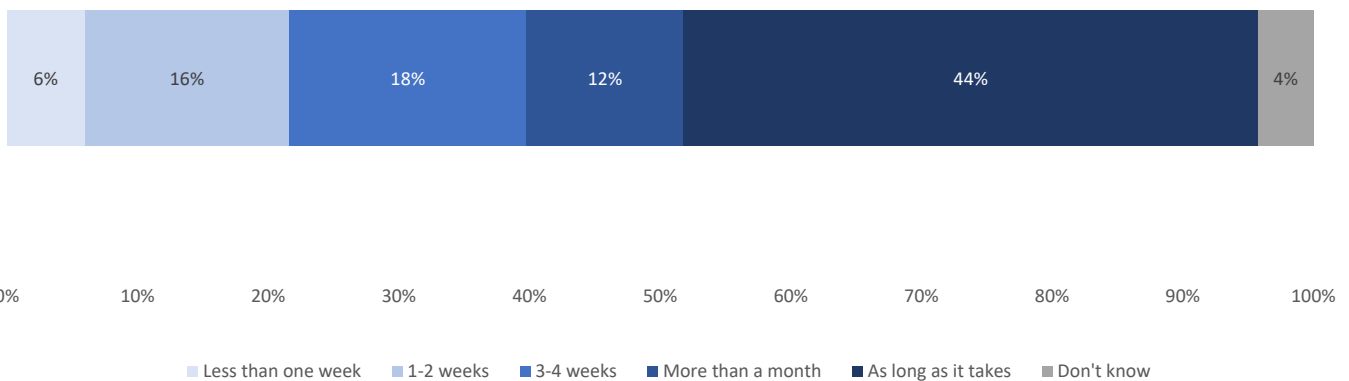
Base: All e-book borrowers who have had to wait for an eBook (5866)

Borrowers are prepared to wait a long time for an ebook to become available to borrow. Over 4 in 10 (44%) said they would wait ‘as long as it takes’.

However, since poor ebook availability is the biggest cause of dissatisfaction, this should not be taken as an indication that they are happy to wait or that waiting does not impact on borrowers’ experience of the service.

**Chart 22: length of time ebook borrowers are prepared to wait**

Q21. What is the longest time you are prepared to wait for an e-book to become available to borrow?



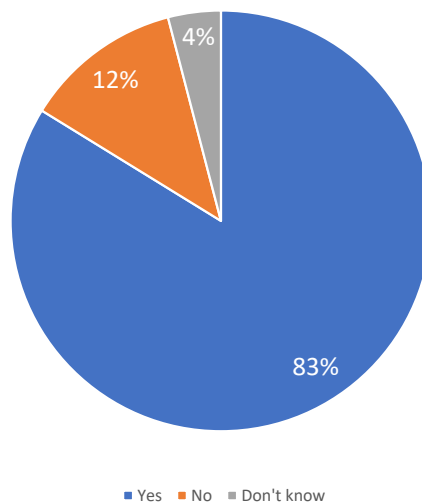
Base: All e-book borrowers (6498)

## Experiences of titles not being listed on the ebook lending app

Borrowers were also asked whether they had ever wanted to borrow an author or title that was not listed on the app and 83% said they had.

Chart 23: Borrowers' experiences of authors or titles not listed on the ebook lending app

Q22. Have you ever wanted to borrow a specific title or author that is not listed on the e-book lending app?

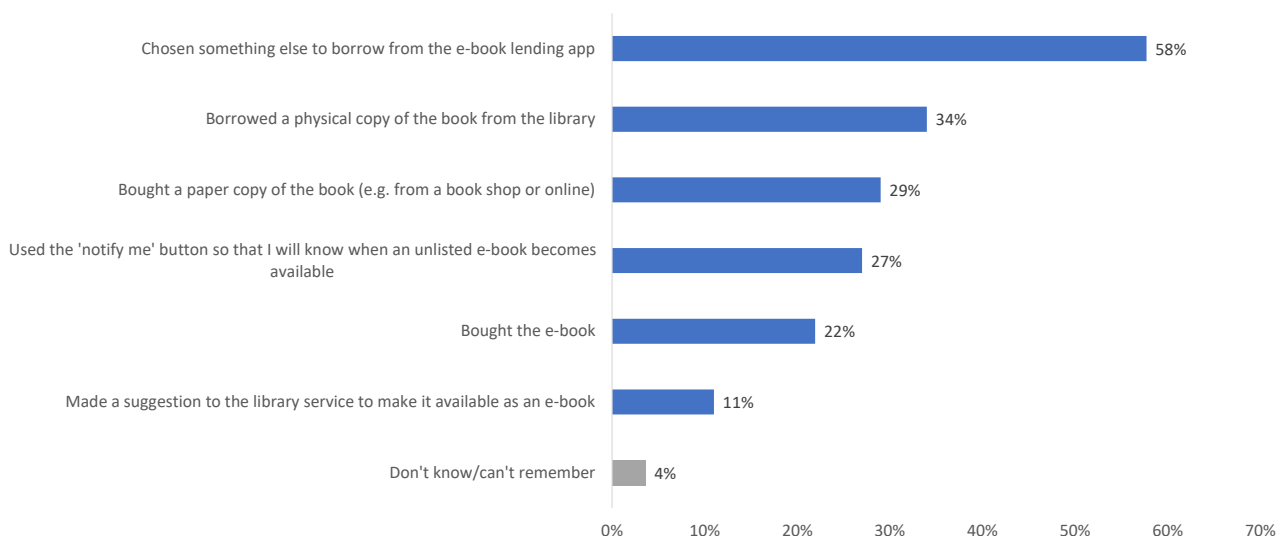


Base: All e-book borrowers (6416)

When the title is not listed on the app, borrowers are most likely to borrow something else from the app – nearly 6 in 10 (58%) have done this. A third (34%) have borrowed a physical copy of the book from the library.

Chart 24: Borrower behaviour when titles are not listed on the ebook lending app

Q23. What have you done when the specific title or author you wanted to borrow is not listed on the e-book lending app



Base: Those who have ever wanted to borrow a specific title or author that is not listed on the e-book lending app (Q22) (5130)

When the title is not listed borrowers are more likely to buy it than when it is unavailable because it is on loan. Just under a third (29%) have bought a physical copy of the title and one in five (22%) have bought the ebook. However, more have used the 'notify me' button to let them know when the title becomes available (27%) than have bought the ebook.

### **Qualitative research findings about experiences of availability and authors/titles not being listed on the app**

Almost all mentioned long waiting lists for titles they were interested in and not finding authors they like on the app.

*"I'm finding it more and more difficult to find things to read because the things I want to read, I've read probably most of them because I'm a very quick reader"* (Man, 75+, Wiltshire)

*"I have to wait nearly every time. If we said out of ten, I would say it happens nine times out of ten and one time I can be lucky and actually be able to get into a book straight away."* (Woman, 65-74, disabled, Merton)

There are also reportedly challenges with incomplete series of books or poor availability of certain titles in series, which make it difficult for the reader to read them in a coherent way.

*"If I do find something else to read, then there may be a series on that book. Say it's book four and I want to start at book one, and book one is already out."* (Woman, 65-74, disabled, Merton)

Some had created long 'wish lists' to avoid finding themselves without anything to read – this meant that they always had something to read while waiting for other titles. Others mentioned browsing the limited term open access titles.

*"It's just for a month. I think they called Spotlight titles or unlimited access titles, it's something like that. And they're all available now for as many people as want them that month."* (Woman, 45-54, Wigan)

However, the differences in access conditions for different titles can create confusion. People do not understand why they have to wait up to three years for certain titles, while others are available simultaneously to all borrowers.

*"I appreciate that there are going to be funding limitations and that sort of thing, but sometimes I can't quite understand why there are unlimited copies available of certain books and other times they've got one copy for everybody, which I don't quite understand."* (Man, 75+, Wiltshire)

Some readers mentioned that authors or titles they wanted to read were not available on the app. In those circumstances they usually either chose something else to read or checked to see if the physical book was available.



#### 4.11 Comparing satisfaction with ebook lending and physical book lending

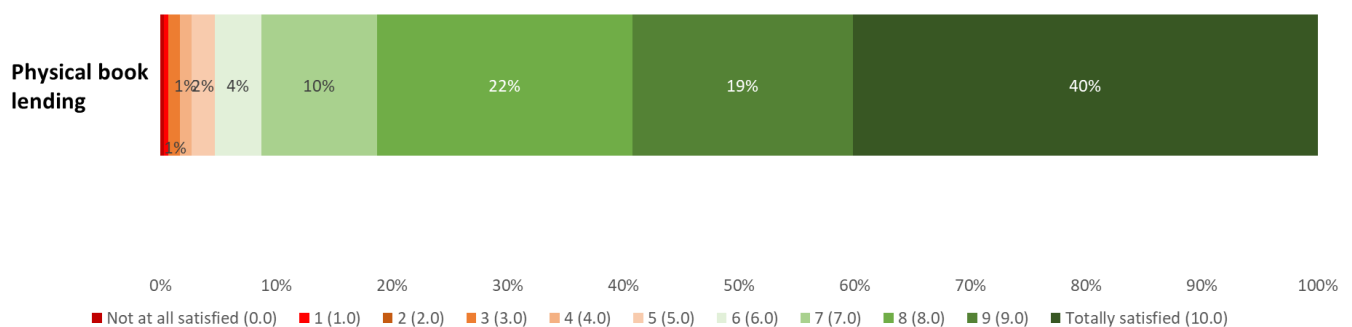
In the post-pilot survey, the same overall satisfaction question was asked for physical book lending, as well as ebook lending, to provide a benchmark for satisfaction with the ebook borrowing experience.

##### Overall satisfaction with physical book lending

Overall satisfaction with physical book lending is higher than for ebook lending, with an average satisfaction score of 8.6/10. Only 4% of physical book borrowers were dissatisfied with physical book lending services.

This shows that, while ebook borrowers are generally satisfied, they are less satisfied with ebook lending services than physical book borrowers are with physical book lending services.

Chart 25: Satisfaction physical book borrowing



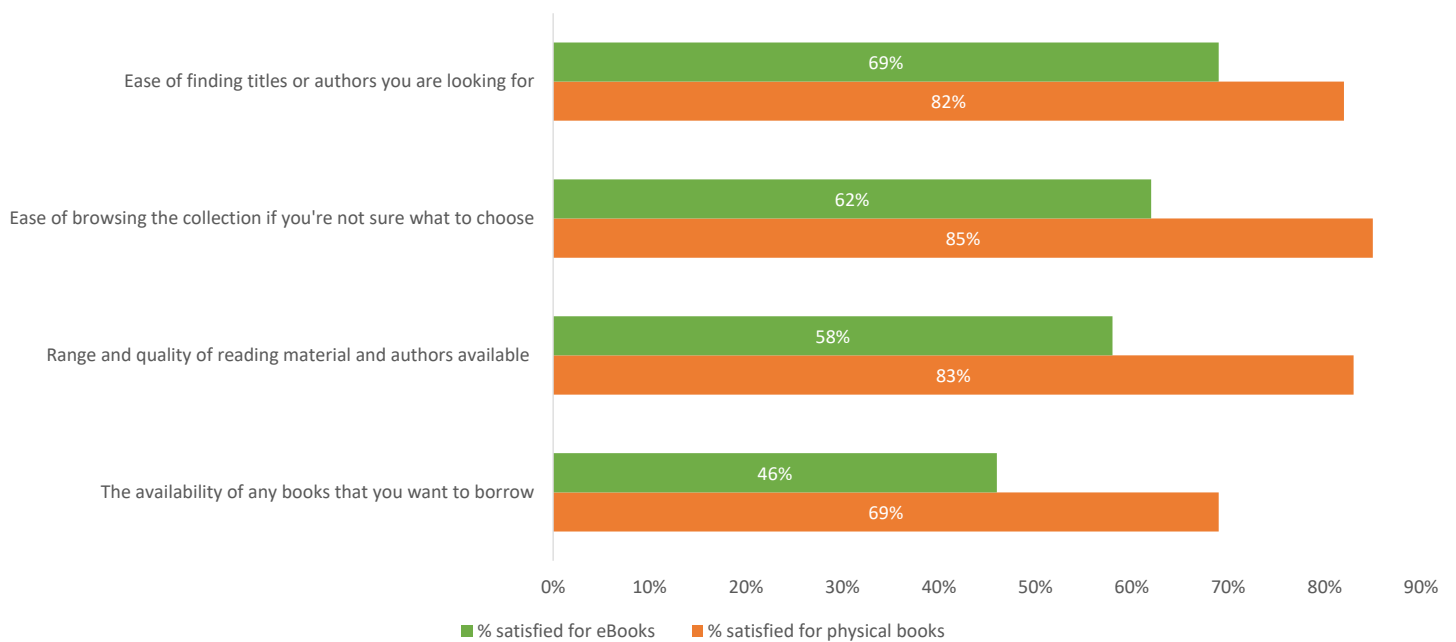
Post pilot survey Q5. Overall, how satisfied are you with your library service's physical/e-book borrowing service? on a scale of 0-10, where 0 = not at all satisfied and 10 = totally satisfied?  
Base: All physical book borrowers (6480)

##### Comparison of satisfaction with specific aspects of the ebook borrowing and physical book borrowing

In the post-pilot survey, a new question was added which compares satisfaction with certain specific aspects of the borrowing experience between ebook borrowing and physical book borrowing.

This comparison shows that satisfaction with all specific aspects of physical book borrowing is higher than for ebook borrowing.

Chart 26: comparison of satisfaction with specific aspects of ebook and physical book borrowing



Q6. & Q24. How satisfied you are with the following aspects of your borrowing experience?  
 Base: All e-book borrowers (6439) All physical book borrowers (9188)

The greatest difference in satisfaction is with the range and quality of reading material and authors available – 83% of physical book borrowers compared with 58% of ebook borrowers are satisfied with this, a 25-point difference. There is also a 23-point difference in satisfaction for ease of browsing and availability of authors but only a 13-point difference in satisfaction with ease of finding titles or authors.

#### 4.12 Impacts of access to ebook borrowing on library users

The data for this section is drawn exclusively from the qualitative research interviews, which focussed on key target audiences including disabled people, those with mental health and long-term conditions, people living on low incomes and minoritised ethnic communities. The case studies below illustrate some of the positive impacts that ebook lending provides.

##### **Claire<sup>4</sup>, aged 73, living in Merton**

Claire found out about the ebook lending offer via a Council newsletter in 2021 when she was recovering from back surgery. She telephoned the library service and told them she wanted to start ebook lending, but she needed to reactivate her membership as she had not used it for some time. She also mentioned that she was unable to get to the library because of her mobility issues.

The library service set up an appointment for someone to visit her in her home, reissue her library card and set her up on both the Libby and Borrowbox apps on her tablet. Initially she started reading ebooks, but she discovered eAudio and now uses it to help her go to sleep in the evening as she suffers with chronic pain and insomnia at night.

<sup>4</sup> Names have been changed to protect anonymity

*"They were very good, they came when they said they would and set everything up, it was so easy."*

She enjoys browsing books on the app and reading the synopses to decide what to read. She particularly enjoys murder mysteries and thrillers as it keeps her brain active. However, she can sometimes find it frustrating when she is halfway through a series and certain titles are just not available or there is a very long waiting list.

She would not be able to use eAudio to support her sleep and wellbeing every night if she had to buy it as she could not afford it on her income. Before she found the eAudio via the library she used to listen to books on BBC Sounds and occasionally bought eAudio books but in a much smaller quantity.

### ***Bill, aged 67, living in Wigan***

Bill is 67 but he has been medically retired from his job as a teacher since he was 50 due to a heart condition. He used to be very involved in providing ICT lessons and support at the library before the pandemic, but he was shielding during the pandemic and hasn't returned to the library since then. This has been exacerbated by the local bus route closing down which makes it difficult for him to get to the city centre.

Bill and his wife signed up for ebook borrowing during the pandemic. He borrows ebooks and eMagazines. Bill is a keen photographer, and he borrows the photography magazines on the lending app, which he would be unable to afford to buy on his low income.

*"If I'm thinking that I'm going to do some black and white photography, I'll find black and white photography magazine. Or if I want to look at equipment and reviews, I'll look at the other camera magazines or the specialist ones for the particular makes of camera that I use, and I'll borrow those magazines for a second, read upon the latest information."*

If he did not have access to ebooks he would have to try and borrow physical books from the library, because he could not afford to buy them. He would also have less scope to develop his hobby, which supports his mental health and life satisfaction since his early retirement.

### ***Sarah, aged 72, Living in Hounslow***

Sarah is a retired NHS worker living on a low income. In 2022 her husband died, and she was also diagnosed with sight loss. Her daughter told her about the ebook borrowing offer from the local library and she went into a branch to ask them to help her get set up.

She borrows ebooks occasionally but more often chooses eAudio, especially for the evenings when poor light makes it more difficult for her to read. She has made a bag that she carries her tablet around in, so that she can take the audio book from room to room. It has helped her to cope with her bereavement.

*"I've made a little denim thing that was just that big. So, it fitted definitely just for my iPad. And when --- died and I joined [the eLending service], I actually got headphones and plugged them in and carried it around with me. So I got my voice in the house, I wasn't sitting on my own."*

Sarah feels that if she didn't have eLending books to listen to, her life would be a lot less satisfying and lonelier and that she would find it harder to cope with sight loss:

*"I think it would be pretty bad actually [without the eLending service], because it saw me through the winter of 2022 when I was still coming to terms with [my loss of vision and my husband's death], I would go out and I did go out, but it was really stressful. So when I came in, I had*

*something to do, I could listen to a book and I could listen to different things... I absolutely love it. It makes a big difference to my wellbeing."*

Sarah has recommended the eLending offer to all her friends and even accompanied them to the library to get set up. Most have found it easy, although one has a very old iPad which is not compatible with the app and so has not been able to use the offer.

## Appendix 1 – Survey demographics and weighting

### Library survey respondents' demographic breakdown

Responses were received from people with a broad range of incomes and with a good representation of disability.

Chart 24 Library user survey demographic breakdown (unweighted data)

		% of total survey respondents	% of ebook borrowers in survey
Gender	Male	26	24
	Female	72	74
	Other	1	1
	Prefer not to say	1	1
Age	18-24	2	3
	25-34	10	10
	35-44	15	14
	45-54	15	17
	55-64	21	22
	65-74	24	25
	75+	11	11
	Unknown	1	1
Income level	Under £20k p.a.	17	15
	£20-39,999k p.a.	28	27
	£40k + p.a.	32	34
Ethnicity	Any white	88	89
	Any minority ethnic background	9	8
	Prefer not to say/not stated	3	3
Disability	Disabled	28	28
	Non-disabled	66	65
	Prefer not to say/not stated	6	7

### Weighting data

Although responses broadly mapped to the data about ebook borrowers received from library services in relation to gender and socio-economic levels. there were low response rates from:

- People from ethnic minority backgrounds (only 9% of responses were from people who identified as non-white while the census from 2021 suggests that 18% of the UK population is non-white)
- Younger people – the table below shows the difference between the survey responses and the ebook borrowing profile and library user profile, with notable differences highlighted in orange.

Age group	Survey responses	ebook borrowing profile (over 18s)	Library user profile (over 18s)
18 to 24	2%	6%	12%
25 to 34	10%	15%	17%
35 to 44	15%	15%	22%
45 to 54	15%	16%	15%
55 to 64	21%	16%	12%
65 to 74	24%	19%	12%
75+	11%	12%	10%

The survey response data was weighted so that it was representative of the ebook borrowing profile based on data received from library services by March 2024, as set out in the table above. Additional data received by May 2024 slightly changes the percentages by age (by 1-2%), but not in a way that will significantly change the results of the survey.

It was not possible to weight the data to be representative of ethnicity because the library data on ethnicity of ebook borrowers is too patchy to provide an accurate benchmark.

## Appendix 2 – Survey text

### Borrowing and buying books and e-books survey for library users

#### **Introduction**

Thank you for taking part in this survey. We are trying to find out more about people’s experiences of our lending offer, and their habits in borrowing and buying books, to help us improve it and ensure that it meets the needs of borrowers.

The survey should take no more than 15 minutes to complete.

We are offering entries into a Prize Draw as a thank you for completing this survey including prizes of:

- 3 prizes of £100 Love to Shop vouchers which can be used in a wide range of stores
- 3 x £50 Book Tokens

You can find the terms and conditions for the prize draw here *[insert hyperlink]* and our privacy notice here *[insert hyperlink]*

#### **Getting started**

1. *ASK ALL:* Are you aged 18 or over? [SCREEN OUT IF NO]

We’d like to ask you some questions about your physical and e-book book borrowing and buying habits.

In this survey when we say ‘physical book’ we mean a book made of paper in hardback or paperback form.

When we say ‘e-book’ we mean a book in electronic form. It can include text, images, or both. It is readable on computers, tablets, phones or e-book readers.

The first few questions are about buying books and e-books; these questions help us to understand how our library offer fits into your borrowing and buying habits.

2. *ASK ALL:* How many, if any **physical** (paper) books have you **bought** in the past year for yourself? [SINGLE CODE]

	For myself	For others
None		
1-3		
4-10		
11-20		
More than 20		
Don’t know/can’t remember		

3. *ASK ALL:* How many, if any, **e-books** have you **bought** in the past year for yourself or others? [SINGLE CODE]

*An e-book is a book in electronic form. It can include text, images, or both. It is readable on computers, tablets, phones or e-book readers.*

	For myself	For others
None		
1-3		
4-10		
11-20		
More than 20		
Don't know/can't remember		

4. ASK ALL: Do you have an **e-book subscription**? [SINGLE CODE]

*An e-book subscription is a paid-for product where you pay a certain amount each month to have access to an online catalogue of e-books. (e.g. Kindle Unlimited, Everand, Perlego)*

a. Yes
b. No
c. Don't know/can't remember

We are now going to ask you about your borrowing habits, for both e-books and physical books.

5. ASK ALL: How many, if any, **physical books** have you **borrowed** from your library service in the past year? [SINGLE CODE]

*A 'physical book' is a book made of paper in hardback or paperback form*

a. None
b. 1-3
c. 4-10
d. 11-20
e. More than 20
f. Don't know/can't remember

6. ASK ALL PHYSICAL BOOK BORROWERS(Q5 CODES b-e): **Why did you borrow physical books** from your library service in the past year? Please select all that apply [MULTICODE]

a. I can't afford to buy books
b. I read a lot, so borrowing keeps the cost of buying books down
c. To try out new authors and books to see if I like them
d. I just like borrowing books
e. Other reason (please write in)

7. ASK ALL: How many, if any, **e-books** have you **borrowed** from your library service in the past year? [SINGLE CODE]

*An e-book is a book in electronic form. It can include text, images, or both. It is readable on computers, tablets, phones or e-book readers.*

a. None
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b. 1-3
c. 4-10
d. 11-20
e. More than 20
f. Don't know/can't remember

**Non e-book borrower questions**

8. *ASK NON E-BOOK BORROWERS (Q7 CODES a and f):* **Why haven't you borrowed any e-books** from your library service in the past year? Please select all that apply [MULTI-CODE]

a. I haven't wanted to borrow any type of book
b. I haven't wanted to borrow a book in electronic form (prefer physical/paper books)
c. I didn't know it was possible to borrow e-books from my library service
d. I don't have a suitable device to read e-books on
e. I don't have a reliable internet connection to download e-books with
f. I considered or tried to borrow an e-book but didn't end up doing so
g. I prefer to buy e-books
h. I have an e-book subscription
i. Don't know/can't remember
j. Other reason (please write in)

9. *ASK NON E-BOOK BORROWERS (Q7 CODES a and f):* **What is the main/most important reason you have not borrowed e-books** from your library service in the past year? Please select one [SINGLE CODE]

a. I haven't wanted to borrow any type of book
b. I haven't wanted to borrow a book in electronic form (prefer physical/paper books)
c. I didn't know it was possible to borrow e-books from my library service
d. I don't have a suitable device to read e-books on
e. I don't have a reliable internet connection to download e-books with
f. I considered or tried to borrow an e-book but didn't end up doing so
g. I prefer to buy e-books
h. I have an e-book subscription
i. Don't know/can't remember
j. Other reason (please write in)

10. *ASK THOSE WHO CONSIDERED OR TRIED TO BORROW AN E-BOOK (Q8 CODE (f)):* Why did you **not end up borrowing an e-book**? Please select all that apply [MULTI-CODE]

a. I couldn't download the app
b. I downloaded the app but it didn't work on my device
c. I couldn't log in
d. I couldn't find anything I wanted to read in the e-book catalogue
e. All the e-books I wanted were already on loan
f. I couldn't download the e-book or reading material I chose
g. Don't know/can't remember
h. Other reason (please write in)

**NON E-BOOK BORROWERS GO TO Q21**

**E-book borrowing questions** *ASK E-BOOK BORROWERS (Q7 CODES b-e) Qs 11-23:*

11. **Why did you borrow an e-book in particular** from your library service in the past year?  
Please select all that apply [MULTI-CODE]

a. I can't afford to buy e-books
b. I read a lot of e-books so borrowing keeps the cost of buying e-books down
c. I borrow a lot of books and e-books take up less space/are easier to carry than physical books
d. Because the physical book wasn't available to borrow
e. I wanted to try reading e-books
f. I prefer reading e-books to physical (paper) books
g. I have a disability, impairment or support need and find e-books easier to use
h. I can't easily get to the library to borrow books so e-books are more accessible for me
i. Don't know/can't remember
j. Other reason (please write in)

12. **How long ago** did you first start borrowing e-books from your library service? If you don't know exactly, please give an approximate time. [SINGLE CODE]

a. Less than 6 months ago
b. More than 6 months but less than 1 year ago
c. 1-2 years ago
d. More than 2 years ago
e. Don't know/can't remember

13. **How do you decide** which e-books to borrow? Please select all that apply [MULTI-CODE]

a. Books by authors I already know and like
b. Browsing the e-book lending app
c. Recommendations by people I know (e.g. friends, family, book club)
d. Recommendations on the library website
e. Recommendations from library staff members
f. Recommendations from TV or radio book clubs (e.g. Richard and Judy's Book Club, Radio 2 Book Club)
g. Online book choice advice apps (e.g. Goodreads.com, Whichbook.com, whatshouldireadnext.com)
h. Online reviews
i. Magazine or newspaper reviews
j. TV reviews
k. Social media (e.g. BookTok, recommendations by influencers)
l. Other (please write in)
m. Don't know/can't remember

14. When you have enjoyed an e-book that you have borrowed from the library have you ever done **any of the following**? Please select all that apply [MULTI-CODE]

a. Bought the same e-book for yourself to read again
--

b. Bought the same e-book for a friend or family member
c. Bought a physical (paper) version of the same book for yourself to read again
d. Bought a physical (paper) version of the same book for a friend or family member
e. Bought other e-books by the same author for yourself or others
f. Bought other physical (paper) books by the same author for yourself or others
g. Recommended the e-book you have read to others (e.g. friends, family or book club)
h. None of the above
i. Don't know/can't remember

15. Since you have been borrowing e-books from your library service, have there been any changes to your physical and e-book purchasing?

	e-books	Physical (paper) books
I have bought more		
I have bought fewer		
I have bought the same amount/no change		
Don't know/can't remember		
I don't buy books or e-books		

16. Overall, **how satisfied** are you with your library service's e-book borrowing service on a scale of 0-10, where 0 = not at all satisfied and 10 = totally satisfied?

17. *ASK ALL EXCEPT UNSURE IN Q16:* Why did you give that score? [OPEN-ENDED QUESTION]

18. **How satisfied** you are with the following aspects of your e-book borrowing experience: [SINGLE CODE FOR EACH ATTRIBUTE]

	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Not very satisfied	Not at all satisfied	Don't know/can't remember
Ease of finding and downloading the e-book borrowing app						
Ease of logging into the e-book borrowing app						
Ease of using the e-book borrowing app once logged in						
Ease of resetting your password or finding your user ID if you forget it						
Range and quality of reading material and authors available on the app						
Ease of finding titles or authors you are looking for						

Ease of browsing the e-book collection if you're not sure what to choose						
The availability of any e-books that you want to borrow						

19. How often, if at all, was an e-book you wanted to borrow **not immediately available** as it was already on loan? [SINGLE CODE]

a. Every time I want to borrow an e-book
b. Most of the time I want to borrow an e-book
c. Sometimes when I want to borrow an e-book
d. Rarely when I want to borrow e-book
e. I have never had to reserve or wait for an e-book I wanted to borrow
f. Don't know/can't remember

20. *ASK THOSE WHO SELECT CODES (a)-(d) IN Q19:* **What have you done** when the e-book you wanted to borrow is not available immediately? Please select all that apply [MULTI-CODE]

a. Joined the reservation or waiting list for borrowing the e-book
b. Borrowed a physical copy of the book from the library
c. Bought the e-book
d. Bought a physical copy of the book (e.g. from a book shop or online)
e. Chosen something else to borrow from the e-book lending app
f. Don't know/can't remember
g. Other (please write in)

21. What is the **longest time you are prepared to wait** for an e-book to become available to borrow? [SINGLE CODE]

a. Less than one week
b. 1-2 weeks
c. 3-4 weeks
d. More than a month
e. As long as it takes
f. Don't know

22. Have you ever wanted to borrow a specific **title or author that is not listed** on the e-book lending app? [SINGLE CODE]

a. Yes ( <i>Go to Q23</i> )
b. No ( <i>Go to Q24</i> )
c. Don't know/can't remember ( <i>Go to Q24</i> )

23. *ASK THOSE WHO SAY YES IN Q22:* **What have you done** when the specific title or author you wanted to borrow is not listed on the e-book lending app. Please select all that apply [MULTI-CODE]

a. Chosen something else to borrow from the e-book lending app
--

b.	Borrowed a physical copy of the book from the library
c.	Bought the e-book
d.	Bought a paper copy of the book (e.g. from a book shop or online)
e.	Made a suggestion to the library service to make it available as an e-book
f.	Used the 'notify me' button so that I will know when an unlisted e-book becomes available
g.	Don't know/can't remember
h.	Other (please write in)

### **A bit more about you**

We just need to ask you a few questions now to help us understand more about you. None of this information will be linked to your borrower number or name or used in any way except to help us understand the information in this survey.

24. What is your age? [SINGLE CODE]

a.	18-24
b.	25-34
c.	35-44
d.	45-54
e.	55-64
f.	65-74
g.	75+
h.	Prefer not to say

25. What is your gender? [SINGLE CODE]

a.	Female
b.	Male
c.	Non-binary
d.	None of these/other
e.	Prefer not to say

26. Which of the following best describes the total annual income of your household (before taxes and deductions but including any benefits/allowances)? [SINGLE CODE]

a.	Under £16,000
b.	£16,000 - £19,999
c.	£20,000 - £29,999
d.	£30,000 - £39,999
e.	£40,000 - £49,999
f.	£50,000 or over
g.	Prefer not to say

27. Which of the following best describes your ethnicity? [SINGLE CODE]

a.	White British
b.	White Irish
c.	White Gypsy

d. White Other
e. Asian Bangladeshi
f. Asian British
g. Asian Chinese
h. Asian Indian
i. Asian Pakistani
j. Asian Other
k. Black African
l. Black British
m. Black Caribbean
n. Black Other
o. Chinese
p. Mixed White/Asian
q. Mixed White/Black African
r. Mixed White/Black Caribbean
s. Mixed Other
t. Turkish
u. Other – Arab
v. Other – Latin American
w. Other
x. Prefer not to say

28. Would you consider yourself to have one or more of the following? Please select all that apply [MULTI-CODE]

a. Physical disability affecting your mobility or dexterity
b. Disability affecting your hearing
c. Blind, vision impaired or partially sighted
d. Long-term health condition
e. Mental health condition
f. Learning disability
g. Neurodiversity such as autism or Asperger's
h. Concentration/memory problems
i. Other disabilities or health conditions which limit your daily activities or work you can do
j. None of the above
k. Prefer not to say

**Coding for library service location**

<b>Numeric code for column DJ</b>	<b>Location</b>
1	London Borough of Hounslow
2	Blackburn with Darwen
3	Bolton
4	Bury
5	City of London
6	Dudley
7	Lancashire
8	Leeds
9	Bromley

10	Merton
11	Newham
12	Wandsworth
13	Manchester
14	Norfolk
15	Oldham
16	Rochdale
17	Greenwich
18	Salford
19	Sheffield
20	Stockport
21	Surrey
22	Tameside
23	Trafford
24	Vision Redbridge
25	West Sussex
26	Wigan
27	Wiltshire

### **Entering the prize draw**

Thank you for completing our survey!

Please provide a name, phone number and email address if you wish to be entered into the prize draw.

This information will be collected by our survey providers, Independent Mind, for the purpose of selecting winners for the prize draw. It will not be used for any other purpose and will be deleted once the prize draw selection has been made on **XXX date**.

If you do not hear from Independent Mind by **XXX date** you have not won a prize.

**Name**

**Email address**

**Telephone number**