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CANADIAN EBOOKS IN PUBLIC LIBRARIES

A Gap Analysis Report on Trends
and Issues in Ebook Collection Practices

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Ontario

**Ontario Media Development
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**Société de développement
de l'industrie des médias
de l'Ontario**

Executive Summary

eBOUND Canada, a not-for-profit agency that assists independent Canadian publishers in developing and supporting digital publishing programs, commissioned the following paper to assess the extent to which Canadian titles that are available in library systems in print format are also available in digital or ebook formats. The following report compares the availability of Canadian titles in Canadian public libraries in print formats to the availability of those same titles in digital and ebook formats through a gap analysis.

In addition to measuring the "gap" in availability between formats, one of the goals of this paper is to gain a mutual understanding of the challenges faced by both publishers and librarians during the acquisition process. This paper also highlights potential opportunities to increase the availability of Canadian titles in digital and ebook formats within Canadian libraries.

This report focuses on Canadian public libraries and library systems only, and does not include data from private, university, college, or school libraries. While the findings and issues outlined in the report may be relevant to the Québec market, the focus of this report is on English-speaking Canada.

Results of our data analysis indicate large and pronounced gaps between the publication formats available in library systems. Analysis demonstrates a significant trend among library systems to purchase Canadian titles in one format only, most often favouring the print format over the ebook format. Time-based analysis shows the average number of Canadian print titles available in libraries were held steady between 2012 and 2016, with no increase in the average number of ebook titles available in library systems. In all, less than 7% of Canadian titles in the Canadian library systems we sampled are available in both formats.

Introduction & Project Background

Goals of Analysis

The primary goal of this analysis is to assess the extent to which Canadian titles that are available in library systems in print format are also available in digital or ebook formats. The secondary goal is to highlight the potential for libraries and publishers to increase the number of Canadian titles in library systems. As such, a gap analysis was determined to be the ideal method of research.

Gap analyses are typically used to highlight discrepancies between two set variables or factors and are used to understand the current state in an industry and to identify steps to move toward business goals.

By contrasting the number of Canadian titles available in print format within library systems against the number available in digital formats, a literal "gap" in availability is identified, and the current availability of each format is assessed. This method also serves to highlight discrepancies in the availability of various publication formats in Canadian libraries, where the size of the gap in availability reveals the extent of these discrepancies.

This gap analysis uses data voluntarily submitted by ten Canadian libraries, library systems, and organizations responsible for the administration of acquisitions, collections, and purchasing, spanning numerous provinces and regions in Canada. While this data set is not representative of all library systems in Canada, the variety of submissions included in our analysis is diverse enough to allow for reasonable extrapolations to be made for Canadian public libraries at-large.

Paired with qualitative information obtained through interviews with librarians and publishers, the availability gap and its accompanying discrepancies can offer insight into the relevant challenges involved in selling Canadian ebooks to libraries. These insights can then allow stakeholders to explore new efforts to increase the availability of ebooks within libraries.

About eBOUND Canada

eBOUND Canada is a not-for-profit organization born out of the digital efforts and aspirations of the Association of Canadian Publishers. eBOUND's mission is to strengthen digital engagement of independent Canadian publishers through digital asset management, distribution, retail agreements, professional development, research, and related services and activities.

Our Consultants

This study was commissioned by eBOUND Canada and conducted by Page Two Strategies, a publishing agency, and their team of consultants.

Laura Dunlop, *Project Consultant/Lead Researcher, Data Analyst and Report Author*

Laura Dunlop is a marketing and publishing professional with dynamic experience in data analysis, document management, and report writing, spanning the areas of publishing, marketing, sales and retail, higher education, and communications. Laura graduated from the University of Waterloo with a Joint Honours Bachelor of Arts in Psychology and English Rhetoric & Professional Writing before completing her master of publishing degree from Simon Fraser University.

Over the course of her career, Laura has completed multiple data analysis projects including a study examining ebook sales data for an international publisher to gather insight on the profitability of digital cookbooks; and a comprehensive analysis of the performance of online properties for a major Canadian magazine. She has collected, coded, and analyzed participant data for psychological tests and measures; and has built and managed internal document databases and workflows for a major North-American retailer. In her marketing-based roles, Laura has also been responsible for the measurement and reporting on a range of marketing tools and tactics, web metrics, and analytics.

Gabrielle Narsted, *Project Manager/Consultant and Library Liaison*

Gabrielle Narsted is Publishing Services Manager at Page Two, supporting publishing projects from conception to publication as project manager. She

graduated from Simon Fraser University with a master of publishing degree, and she also holds a bachelor of arts in English literature and is a certified technical writer and editor.

Jesse Finkelstein, *Project Lead and Publisher Liaison*

Jesse Finkelstein is the co-founder and principal of Page Two. She brings to the company an extensive knowledge of publishing operations, sales strategy, and digital publishing. Before launching Page Two, Jesse held several other publishing roles, including COO and Digital Asset Director at D&M Publishers and Associate Publisher at Raincoast Books. She has a master of publishing degree from Simon Fraser University and is now adjunct professor in publishing at the university.

Public Libraries Background Information

Public Library Funding Models

Funding for Canadian libraries and library systems is acquired by municipal tax revenues and other local sources of income. Municipalities often leverage a special "library tax" to fund operating costs and resource budgets. Additional funding may come from their provincial or territorial government in the form of operating grants, often provided on a per capita basis. Funding from the federal level is limited if provided at all.

To best support the needs of Canadian library systems and their patrons, larger library systems and organizations have formed, covering regions instead of single municipal areas or urban centres. Financial support for regional systems differ in each province.

Canadian libraries generally fall under one of two management models, largely driven by their geographical location and population size.

Canadian Urban Libraries Council (CULC)

The first and most common management model is the Canadian Urban Libraries Council (CULC) / Conseil des Bibliothèques Urbaines du Canada. Formally incorporated in 2008, CULC works with a number of Canadian libraries and library systems to improve library services in Canadian urban centres. According to their website, CULC "is committed to the strengthening of vibrant urban communities through building the capacity of Canada's urban libraries" and spent "over $90 million on collections including $11 million on digital resources" in 2015.

Library Cooperatives (Co-ops)

For libraries in remote areas or for those serving smaller populations, the need for a collaborative management model is even more pronounced and most often comes in the form of a library cooperative.

A library cooperative functions as a not-for-profit organization comprised of member libraries that each contribute to the cooperative through levies or other membership fees. Co-ops are often governed by a board elected by their

members, and they seek to provide services and support to all their member libraries. These services can include oversight and implementation of IT and infrastructure, creation of accessible library services for patrons with unique needs or disabilities, and the management of purchasing and/or licensing of resources and collections.

Public Library Ebook Licensing Models

OverDrive, one of the largest suppliers of ebooks to Canadian libraries, offers three distinct licensing models for digital titles purchased by libraries: one title one user, simultaneous access or subscription, and metered access.

One Title One User

One title one user is the most common licensing model for libraries and mimics the traditional library book borrowing model, allowing one patron per copy of the title to use the ebook at a given time. If a library purchases multiple copies of the ebook, multiple patrons can read the title simultaneously, but it is always a one-to-one ratio of patrons to copies in circulation at a given time.

Simultaneous Access or Subscription

Unlike one title one user, the simultaneous access or subscription model allows libraries to loan out an unlimited number of copies of the same title within a set period (e.g. a year) without needing to purchase each copy individually. This means that library patrons always have access to the title because it is not possible to limit its use within the set timeframe.

Metered Access

Perhaps the most complex of models, metered access limits the number of circulations for a given title. Once the circulation limitation is reached, the library must purchase the title anew should they wish to keep the title in their catalogue. For example, an ebook licensed for fifteen circulations must be re-licensed by the library acquisition staff once the fifteenth patron borrows the ebook. Some metered access models may also stipulate a license expiration, whereby the license may terminate after the circulation limitation has been reached *or* after a certain period of time has elapsed, whichever comes first. For example, under this model, if a title is

not popular with a library's patronage, and the license expires before reaching the circulation limit, it is possible the license will not be renewed by staff.

Current State of Library Ebook Inventory and Acquisitions

Canadian Library System Ebook Funding

As part of the data collection outreach process, participating libraries were asked to indicate whether or not their system receives funding for ebook purchases and, if so, from where (e.g. provincial grants, federal grants).

None of the participating libraries indicate receiving ebook-specific funding from any source, but some note, internally, their budget is split between print and digital formats such that a certain portion of their annual acquisitions budget is dedicated to the growth of their ebook collection.

Constraints for Librarians Acquiring Ebooks

After collecting the quantitative data necessary for our gap analysis, a follow-up questionnaire was sent to participating libraries in the hope of building a qualitative understanding of ebook acquisitions in library systems. Questions (listed in Appendix A) focused on the processes and challenges associated with acquiring ebooks and were structured to allow long-form responses that were then synthesized into the following insights. These insights also inform our interpretation of quantitative findings.

While the answers range from library system to library system, there are some common threads between all respondents. First, Canadian content is noted as being an acquisition priority; second, patron requests are heavily factored into the acquisition of titles; and third, OverDrive is a common system used to acquire at least some titles in the sampled systems.

The sampled library systems note that their process for acquiring print titles differs from their process for acquiring ebook titles. For example, some acquisitions librarians noted ordering ebooks *after* they've ordered and assessed the level of patron interest there is in the print book or in its author.

Most importantly, according to librarians, the largest factor when it comes to acquiring a title in print versus ebook is cost. Some librarians note that ebooks can sometimes be more expensive than print titles, which makes ebook purchasing prohibitive. For example, it might be considerably cheaper to buy a book in mass-market paperback format than to buy its ebook counterpart, especially if the licensing model charges a multi-year access fee.

Beyond their similarities, library systems report various processes for acquiring titles. Some note that the responsibility for acquiring new titles falls to one librarian, while others reference provincial selectors or panels of librarians as the key decision-makers.

Constraints for Publishers Selling Ebooks Into Libraries

In addition to library outreach, five Canadian publishers were also interviewed. The publishers represented different regions within Canada, with the majority from British Columbia and Ontario. They ranged in size from imprints of large multi-national publishing corporations to small independent publishers. These interviews sought to better understand publisher perspectives on the current landscape of digital publishing and ebook sales to libraries in Canada.

Among the questions, we asked, "What challenges do you face in selling your ebooks into public libraries?" Publisher responses focus primarily on title discoverability, patron awareness of ebook services, and pricing.

A number of publishers note that one of the largest challenges in selling ebooks to libraries is the lack of opportunities to market their books to librarians. They note that this issue is not solely limited to digital titles but rather it affects their titles in general. However, they feel that this is a persistent and more severe challenge with ebooks, leading to what they believe is a limiting factor in ebook sales.

The second key challenge identified by publishers is the level of awareness among the public of ebook availability through public libraries. Publishers note that they believe consumers more commonly associate ebooks with retailers rather than public libraries, thereby decreasing library patron demand for digital formats and reducing library purchases of ebooks as a result.

Lastly, some, but not all, publishers cite ebook pricing as another challenge to their sale of ebooks. For those publishers that choose to apply slightly higher pricing for library purchases to compensate for the number of readers per copy, they feel there is an associated purchasing deterrence for libraries.

Gap Analysis

Methodology

All data included in the gap analysis was voluntarily submitted. Outreach to key library contacts was performed by eBOUND consultants requesting participation in this research and outlining the project parameters, goals, and methodology.

Library contacts were provided a spreadsheet containing an aggregated list of 6,429 Canadian titles recorded by BookNet Canada as having both print and ebook editions. This aggregated list had been generated from a more extensive BookNet Canada database by cross-referencing the ISBNs of a total 8,355 Canadian print titles, published between 1970 and 2016, to corresponding eISBNs published in the same timeframe. The result was 6,429 Canadian titles that had print and ebook editions.

Using the relevant metadata for title, author, publisher, and ISBN/eISBN, libraries were asked to cross-reference the compiled BookNet Canada list of titles with their own collection catalogues and return two lists: one list including all print titles (and their accompanying metadata) found to have a match in their catalogue, and the other list including all digital or ebook titles (and their accompanying metadata) found to have a match in their catalogue. A template was provided to libraries for their returned lists.

Overview of Sampled Data/Groups/Library Systems Included in Gap Analysis

The aggregated list of Canadian titles provided by BookNet Canada includes 6,429 titles from seventy-two Canadian publishers and imprints, published between 1970 and 2016. A complete list of the publishers of these titles can be found in Appendix B.

The library systems included in the analysis represent the provinces of Alberta, British Columbia, New Brunswick, Newfoundland and Labrador, and Ontario. All library systems included in our sample indicated that they do not receive funding outside of their standard funding model, which is largely made up of municipal library tax levies and provincial operating grants. Libraries provided data on assurance of anonymity.

While this data set is not representative of all library systems in Canada, the variety of submissions included in our analysis is diverse enough to allow for reasonable extrapolations to be made for Canadian public libraries at-large.

Limitations of Sample Groups/Data

In order to provide findings relevant to the Canadian publishing landscape at large, every effort was made to include data from a well-distributed range of Canadian library systems, both geographically speaking and in terms of management and funding models.

We were successful in collecting data from library systems in Alberta, British Columbia, Ontario, New Brunswick, and Newfoundland and Labrador, including systems under CULC and co-op management models.

That said, many libraries expressed difficulties exporting and sharing their catalogue data, often citing software and database constraints. These technical difficulties within the data collection portion of the project meant that numerous libraries were unable to participate, thus limiting our sample size.

It should also be noted that in discussion with library staff, it was discovered that numerous library systems may, in addition to their owned collections, offer patrons access to ebook subscription services such as Tumblebooks, which could increase the actual number of ebook titles available to patrons beyond the library system's individually-acquired titles. Data from such subscription services has not been included in the analysis.

Gap Analysis: All Library Systems Samples

We began our analysis by examining the data provided by each of our participating library systems and drawing averages across all systems (Figure 1).

In doing so, we see that, on average, library systems have acquired 2,260 Canadian titles of the 6,429 titles recorded by BookNet Canada as having both print and ebook editions. Of that, 1,748 or 80.90% of the acquired titles are print format while only 25.74% are ebook format. This represents a gap of availability

between formats and reveals that Canadian titles are available in Canadian library systems in print format more than three times as often as they are in ebook format.

Figure 2 offers a graphical depiction of this gap.

FIGURE 1. Summary of the Availability and Formats of Canadian Titles in Canadian Library Systems

Library System	Total Number of Unique CDN Titles Matched to BookNet List in Either Format	CDN Titles Matched to BookNet List Available in Print Format	Percentage of Titles Matched to BookNet List Available in Print Format	Number of Titles Matched to BookNet List Available in Print Format Only	Percentage of CDN Titles Matched to BookNet List Available in Print Format Only	CDN Titles Matched to BookNet List Available in Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format	CDN Titles Matched to BookNet List Available in Ebook Format Only	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format Only	CDN Titles Matched to BookNet List Available in Both Print and Ebook Formats	Percentage CDN Titles Matched to BookNet List Available in Both Print and Ebook Formats
Library 1	556	545	98.02%	532	95.68%	24	4.32%	11	1.98%	13	2.34%
Library 2	4064	3767	92.69%	3232	79.53%	832	20.47%	297	7.31%	535	13.16%
Library 3	1888	1834	97.14%	1729	91.58%	159	8.42%	54	2.86%	105	5.56%
Library 4	2471	424	17.16%	90	3.64%	2381	96.36%	2047	82.84%	334	13.52%
Library 5	2764	2503	90.56%	2315	83.76%	449	16.24%	261	9.44%	188	6.80%
Library 6	2263	2174	96.07%	2174	96.07%	89	3.93%	89	3.93%	0	0.00%
Library 7	1045	840	80.38%	823	78.76%	222	21.24%	205	19.62%	17	1.63%
Library 8	2883	2652	91.99%	2292	79.50%	591	20.50%	231	8.01%	360	12.49%
Library 9	1169	1169	100.00%	1107	94.70%	62	5.30%	0	0.00%	62	5.30%
Library 10	3504	1578	45.03%	1380	39.38%	2124	60.62%	1926	54.97%	198	5.65%
AVERAGE	**2260.70**	**1748.60**	**80.90%**	**1567.40**	**74.26%**	**693.30**	**25.74%**	**512.10**	**19.10%**	**181.20**	**6.65%**

FIGURE 2. Formats of Canadian Titles Available in Canadian Library Systems
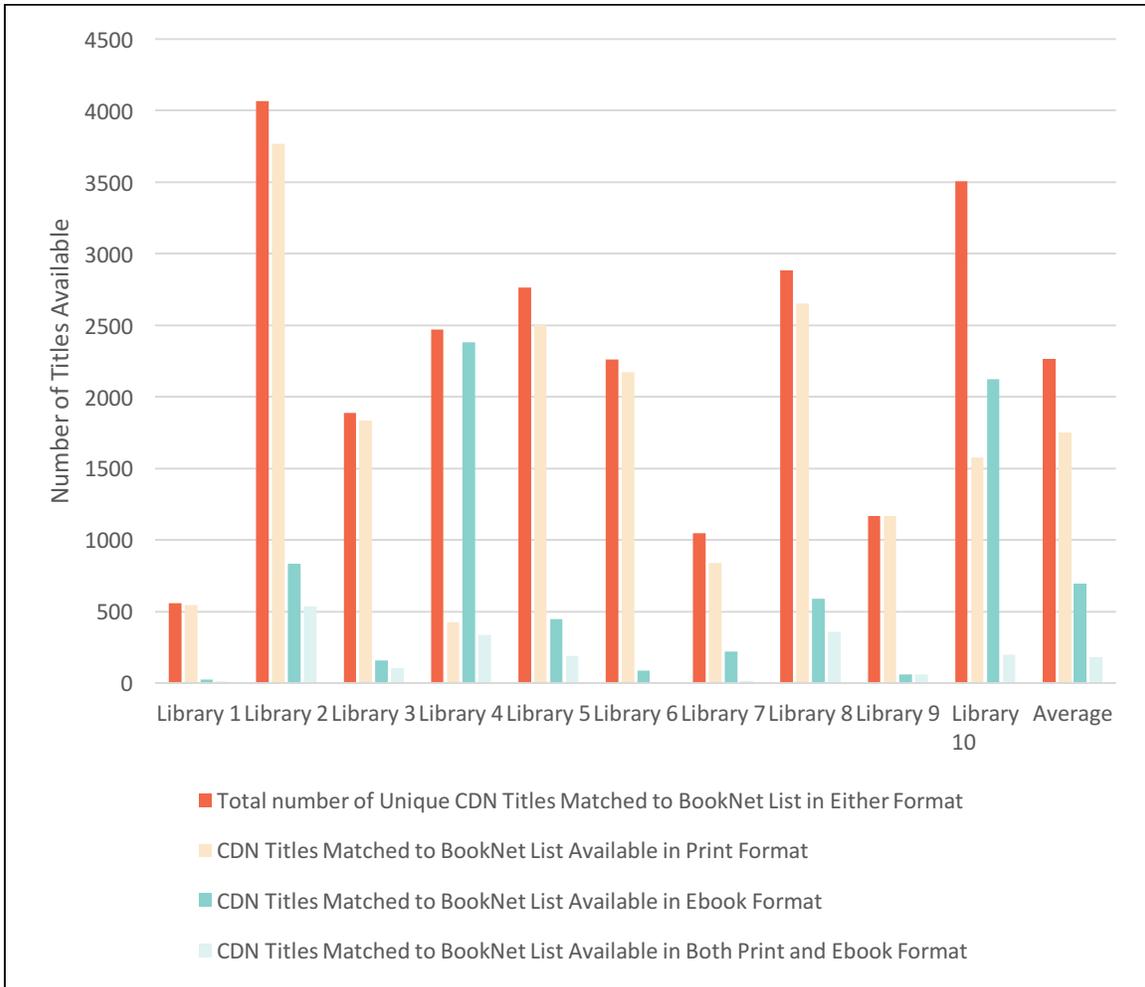
To fully understand this and the subsequent analysis, it is important to acknowledge that the averages presented for format availability (print only, ebook only, both print and ebook) are calculated using the number of titles in a library's collection that *matched* to the BookNet Canada list of 6,429 titles—only those titles available in both print and ebook formats.

But as seen in Figure 1, among the Canadian libraries sampled, only an average of 2,260 of those titles were in their collections.

By examining the averages within a library's collection, we focus our analysis on title *format* availability rather than *title* availability.

Another way to frame the gap between available formats in library systems is to examine how many titles, on average, are available in *both* formats. Based on our sampled library systems, only 6.65% of titles are available both in print format *and* in ebook format, leaving 93.35% of Canadian titles available in only one format. This breakdown is represented visually in Figure 3.

Of those titles available in only one format, print format is once again more common, with an average of 74.26% of Canadian titles available only in print format and 19.10% of titles available only in ebook format.

FIGURE 3. Canadian Library Collections of Canadian Titles by Available Format

There are, however, two unique cases found among our sampled library systems. Specifically, libraries 4 and 10 both show collections having more titles available in ebook format than in print format.

To help ensure our analysis is valid and provides an average and reasonable evaluation of library system collections, efforts were made to identify potential

outliers using the interquartile range for the percentage of titles available in print format. The interquartile range and its "fences" work to identify outliers by breaking data into quarters and using those quarters and the distance between them to identify an acceptable range for data to fall in. Anything outside the acceptable range is considered an outlier. In this case, Library 4 proves to be an outlier with 17.16% of its collection available in print format, while Library 10 is not an outlier.

The calculations are shown in Figure 4.

FIGURE 4. Identifying Outliers in the Percentage of Titles Available in Print Format (Calculation of Interquartile Range Fences)

	Percentage CDN Titles Available in Print Format
Library 4	17.16%
Library 10	45.03%
Library 7	80.38%
Library 5	90.56%
Library 8	91.99%
Library 2	92.69%
Library 6	96.07%
Library 3	97.14%
Library 1	98.02%
Library 9	100.00%

	Percentage CDN Titles Available in Print Format
Median	92.34%
Q1 <	80.38%
Q4 >	97.14%
Interquartile Range Q3 - Q1	16.76%
Outer Fence Lower	30.11%
Inner Fence Lower	63.63%
Inner Fence Upper	113.90%
Outer Fence Upper	147.41%

FIGURE 5. Summary of the Average Availability and Formats of Canadian Titles in Canadian Library Systems Both with and without Identified Outliers

	Total Number of Unique CDN Titles Matched to BookNet List in Either Format	CDN Titles Matched to BookNet List Available in Print Format	Percentage of Titles Matched to BookNet List Available in Print Format	Number of Titles Matched to BookNet List Available in Print Format Only	Percentage of CDN Titles Matched to BookNet List Available in Print Format Only	CDN Titles Matched to BookNet List Available in Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format	CDN Titles Matched to BookNet List Available in Ebook Format Only	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format Only	CDN Titles Matched to BookNet List Available in Both Print and Ebook Format	CDN Titles Matched to BookNet List Available in Both Print and Ebook Format
Average including Library 4	2260.70	1748.60	80.90%	1567.40	74.26%	693.30	25.74%	512.10	19.10%	181.20	6.65%
Average excluding Library 4	2237.33	1895.78	87.99%	1731.56	82.11%	505.78	17.89%	341.56	12.01%	164.22	5.88%
Change	**-23.37**	**147.18**	**7.08%**	**164.16**	**7.85%**	**-187.52**	**-7.85%**	**-170.54**	**-7.08%**	**-16.98**	**-0.76%**

By excluding Library 4 from our analysis in Figure 5, we see the previously identified gap in available formats (percentage of titles available in print versus percentage available in ebook) widens to 70.09% (initially 55.16%) with an average of 87.99% of titles available in print format and only 17.89% available in ebook format. Although it is important to identify and consider outliers, all further analysis conducted in this study and present in this report includes the full dataset from ten libraries. The decision to include Library 4 data was made due to the already small sample size of the full dataset.

Examining the Gap Over Time

After this initial analysis, we explored the possibility of acquisition trends shifting over time. Is the gap in print and ebook acquisitions holding steady, or is it growing or shrinking over time?

To provide an answer, we re-examined our sampled library system data by year, choosing specifically to examine the most recent five years, from 2012 through 2016. Note that, because we did not have information regarding the year in which a title was purchased, we instead filtered and segmented our data by the publication year of the titles matched to the BookNet Canada list. Library 4 was included in this analysis.

We began our analysis by first evaluating the five-year period of 2012 through 2016 as a whole, comparing it to the years prior and the overall average for all the titles published between 1970 and 2016 (Figure 6). This comparison is graphically depicted in Figure 7.

FIGURE 6. Summary of the Average Availability and Formats of Canadian Titles in Canadian Library Systems Based on Year of Publication

| Averages	Total number of Unique CDN Titles Matched to BookNet List in Either Format	CDN Titles Matched to BookNet List Available in Print Format	Percentage of CDN Titles Matched to BookNet List Available in Print Format	CDN Titles Matched to BookNet List Available in Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format	CDN Titles Matched to BookNet List Available in Both Print and Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Both Print and Ebook Format
All Time (1970-2016)	2260.7	1748.6	77.35%	693.3	30.67%	181.20	8.02%
1970-2012	1331.2	972.6	73.06%	448.3	33.68%	89.70	6.74%
2012-2016	929.5	776	83.49%	245	26.36%	91.50	9.84%

FIGURE 7. Average Availability and Formats of Canadian Titles in Canadian Library Systems Based on Year of Publication
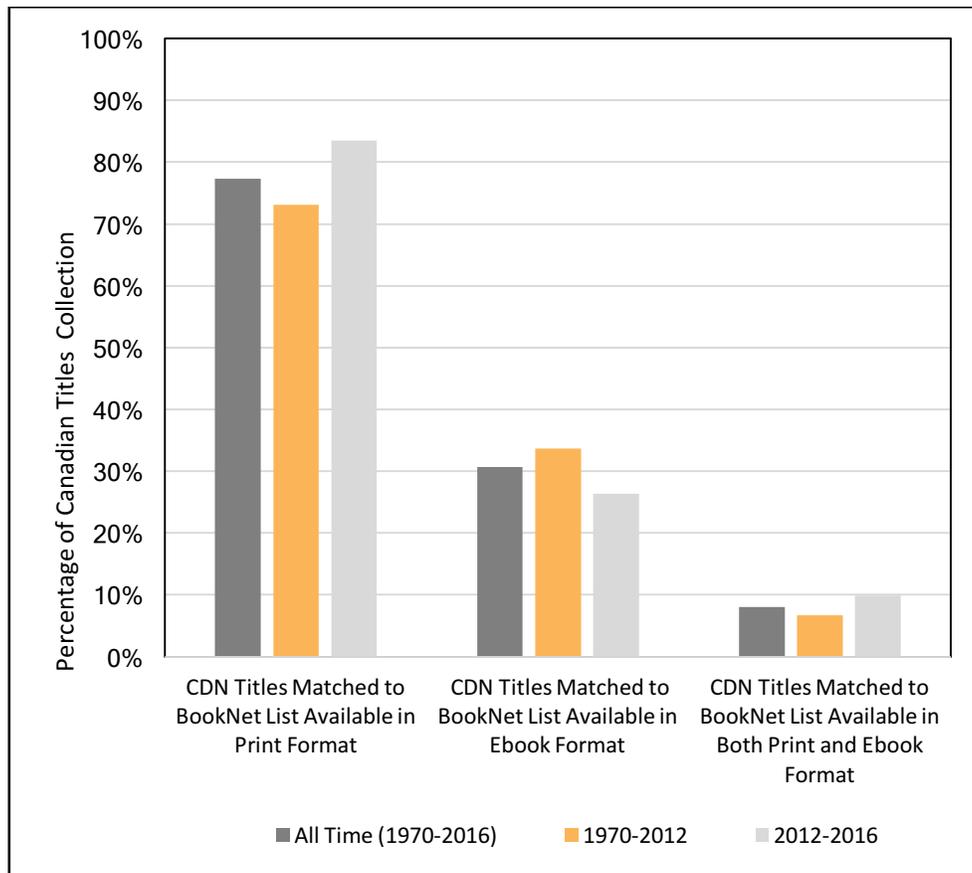
Based on this evaluation (Figures 6 and 7), we can see that the percentage of titles available in library systems in print format has risen for books published 2012 through 2016 compared to books published in years prior. Meanwhile, the share of Canadian titles available in those same library systems in ebook format is lower for books published in the period 2012 to 2016. This reveals a widening of the gap in available formats for newer Canadian titles in library systems. In the years prior to 2012, this gap was 39.9%, but in the five-year period of 2012 to 2016, that rose to 57.13%—higher even than the lifetime average gap of 46.68%. Interestingly, despite the widening of this gap, 2012 to 2016 showed more titles available in both formats than in years prior.

Looking specifically at the years 2012 through 2016 (Figure 8), we can see, within this five-year period, there was little change to the gap in availability of formats. At its widest, the gap was 59.40%, and at its lowest, 55.34%—a change of just over 4%.

FIGURE 8. Summary of Average Availability and Formats of Canadian Titles Published Between 2012 and 2016 in Canadian Library Systems

	Total number of Unique CDN Titles Matched to BookNet List in Either Format	CDN Titles Matched to BookNet List Available in Print Format	Percentage of CDN Titles Matched to BookNet List Available in Print Format	CDN Titles Matched to BookNet List Available in Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Ebook Format	CDN Titles Matched to BookNet List Available in Both Print and Ebook Format	Percentage of CDN Titles Matched to BookNet List Available in Both Print and Ebook Format
2012	196.8	165.8	84.25%	53	26.93%	22.00	11.18%
2013	187.2	155	82.80%	51.4	27.46%	19.20	10.26%
2014	194.5	163.2	83.91%	51.1	26.27%	19.80	10.18%
2015	197.3	166.1	84.19%	48.9	24.78%	17.70	8.97%
2016	153.7	125.9	81.91%	40.6	26.42%	12.80	8.33%

However, even with so little change, if we plot trend lines over the five-year period, a slight overall downward trend can be seen in the availability of titles in print format, ebook format, and both formats simultaneously (Figure 9).

Further analysis beyond the scope of this project would be needed to verify whether or not this apparent downward trend is significant and pervasive across the industry, using library acquisition data rather than title publication data.

FIGURE 9. Average Availability and Formats of Canadian Titles Published Between 2012 and 2016 in Canadian Library Systems
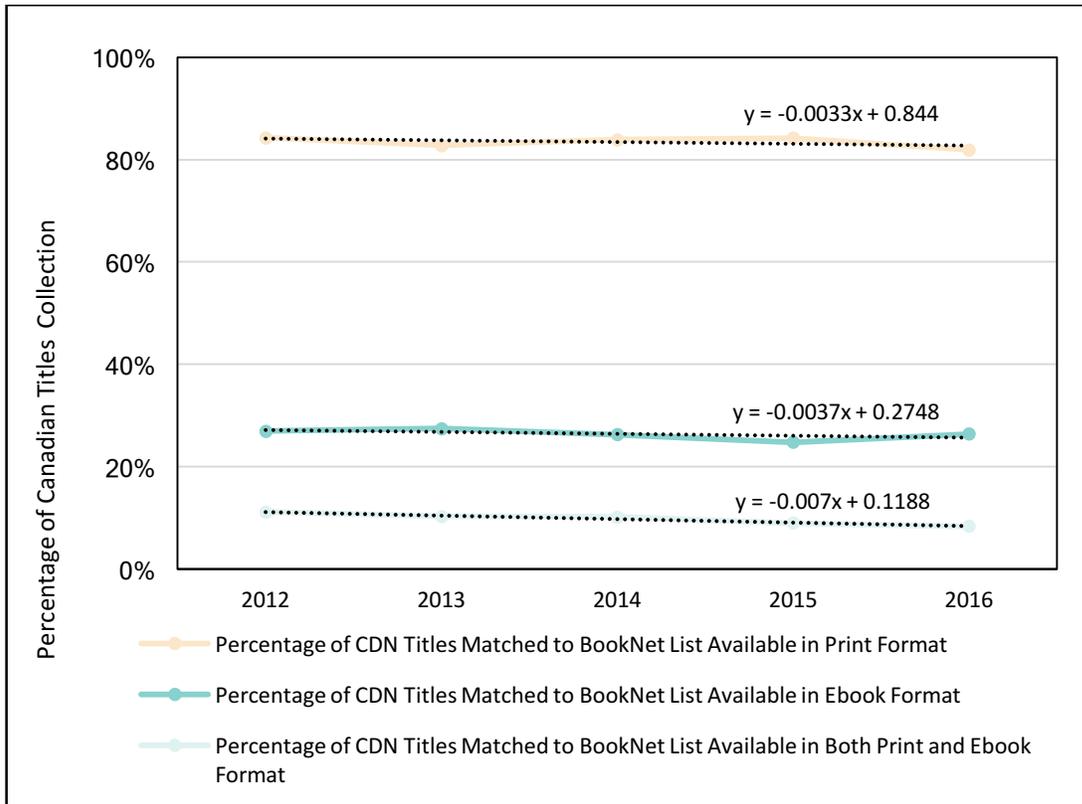
Conclusions & Discussion

Current Gaps in Availability of Canadian Titles in Print and Digital Formats in Canadian Library Systems

Based on the above analysis, there are several gaps that can be identified.

Canadian Titles Available in Canadian Libraries in Only One Format Versus Those Available in Both Print and Ebook Formats

First, from the sample data (including Library 4), we can see that an average of only 181.20 titles or 6.65% of Canadian library systems' collections of Canadian titles are available to patrons in both print and digital formats. This leaves 93.35% of titles available in only one of the two formats.

With such a large gap between titles available in only one format and titles available in both formats, it confirms that Canadian libraries more often purchase titles in only *one* format as opposed to both.

Canadian Titles Available in Canadian Libraries in Print Format Only Versus Those Available in Ebook Format Only

When we break down the above noted gap of 93.35% to examine the difference in availability between each of the two formats, print and ebook, a second gap emerges.

Of the titles unavailable in both formats, 74.26% are available in print format only, while 19.10% are available in ebook format only—a gap of 55.16%. This reveals that Canadian library systems purchase Canadian titles in print format far more often than ebook format, and raises questions about the opportunity for publishers and librarians to increase the availability of Canadian-published ebooks in Canadian library systems.

Further analysis beyond the scope of this project could look for trends in title metadata for titles purchased in each or both formats. Based on the qualitative responses to our publisher interviews and questionnaires, factors to consider in possible future analysis could include: title genre, sales performance (bestseller/frontlist, midlist, and backlist), price, and licensing model.

Percentage of BookNet List of Canadian Titles Available in Either Format in Canadian Library Systems

One additional gap that should be noted is the one that exists between the number of titles listed in the original BookNet Canada list of titles available in both print and ebook formats and the number of those titles available in either format in library systems.

FIGURE 10. Average Availability and Formats of Canadian Titles Published Between 2012 and 2016 in Canadian Library Systems

Library System	Total Number of Unique CDN Titles Matched to BookNet List in Either Format	Total Number of Unique CDN Titles Matched to BookNet List in Either Format
Library 1	556	8.65%
Library 2	4064	63.21%
Library 3	1888	29.37%
Library 4	2471	38.44%
Library 5	2764	42.99%
Library 6	2263	35.20%
Library 7	1045	16.25%
Library 8	2883	44.84%
Library 9	1169	18.18%
Library 10	3504	54.50%
AVERAGE	**2260.70**	**35.16%**

From the breakdown presented in Figure 10, we can see that only an average of 2,260 titles or 35.16% of all 6,429 titles on the BookNet list are present in Canadian library systems, leaving nearly two thirds of Canadian titles unaccounted for. This represents a gap of 64.84% between the available content through public library systems and the total available Canadian content.

This gap highlights the current volume of Canadian titles available in Canadian library systems, regardless of format, and demonstrates opportunity for Canadian

library systems to acquire more Canadian titles for their collections. It also provides important contextualization for the above analysis and any gaps in format availability identified therein.

To properly interpret this gap and subsequent analysis, it should be noted that our analysis used Canadian titles as defined by having a Canadian publisher and Canadian ISBN; however, there is a possibility that Canadian library systems have content that could be categorized as Canadian using different criteria. For example, titles authored by Canadians or about Canadian topics but published through an international publisher or under a U.S. IBSN for general sale into the North American market. Future research could address this by using a broader dataset.

Identified Gaps Over Time

Finally, all three gaps identified above showed only minor change over a time period of 2012 to 2016, with each gap growing slightly. This shared growth across all three gaps indicates that the overall number of Canadian titles in Canadian library systems is in slight decline. Further analysis beyond the scope of this project would be needed to verify whether or not this apparent downward trend is significant and pervasive across the industry, using library acquisition data rather than title publication data.

The prevalence of acquired print format over ebook format is holding strong. This could suggest a need for publishers to incentivize the purchase of Canadian content, and specifically Canadian titles, in ebook format for Canadian library systems.

Future Research

Recommended Future Research and Analysis

In addition to the possible areas of future analysis mentioned above, the Consultants have the following suggested research directions:

To better understand if it is worthwhile to pursue methods to close the above identified gaps, research into the circulation rates of Canadian titles in each format is recommended. This would allow us to better understand if there is a missed opportunity on the part of libraries to supply titles in multiple formats or if library systems' purchasing habits are well matched to the demands and circulation patterns of their patrons. This would also address the belief among publishers that ebook sales to libraries are made more difficult due to a low level of public awareness of ebook availability through public libraries.

A second recommended line of further analysis is to examine the impact of ebook licensing models on the purchasing trends of Canadian library systems. This is particularly compelling given that in our qualitative research, library systems did cite cost and licensing models as key constraints to their purchase of ebooks.

Another potential extension to our current research would be to examine the third-party systems and subscription services being used by Canadian library systems to provide content to their patrons. This may in fact reveal additional content available in ebook format that has not been taken into account by the data provided to us by the library systems sampled in this report.

Appendix A: Questionnaire for Canadian Library Systems

- Name of your library system.
- How many print books are in your library's collection? How many ebooks are in your library's collection?
- What is the basic process for acquiring a new title?
- Is the process you described above different for print books and ebooks? If yes, how?
- Who are the key decision-makers in the process(es) described above?
- Are there specific guidelines for the process(es) described above?
- Are patron requests a factor in the decision to acquire a specific title? If yes, to what extent?
- At best estimate, what percentage of titles are purchased via OverDrive? What other systems/purchasing channels are used, if any?
- Are there are additional guidelines applied to your library's purchase of ebooks specifically?
- What challenges do you experience when purchasing ebooks specifically?
- When purchasing either print books or ebooks, how important is it that a title is Canadian?
- Are there any policies or guidelines in place regarding the purchase of Canadian books?

Appendix B: Publishers Included in List of Canadian Titles for Cross-referencing with Canadian Library Catalogues

Annick Press

Anvil Press

Arbeiter Ring Publishing

Athabasca University Press

Athabasca University Press and Canadian Committee on Labour History

Athabasca University Press and University of Alberta Press

Banff Centre Press

Between the Lines

Books We Love Ltd.

BookThug

Boulder Publications

Breakwater Books Ltd.

Brick Books

Brindle & Glass

Brush Education

Caitlin Press

Centre for Addiction and Mental Health

Coach House Books

Coteau Books

Creative Book Publishing

Crow Cottage Publishing

Dundurn

Fifth House Books

Fitzhenry & Whiteside

Formac - James Lorimer & Company Ltd., Publishers

Formac Publishing Company Limited

Freehand Books

Freehand Books - Broadview Press

Goose Lane Editions

Goose Lane Editions and the Gregg Centre for the Study of War and

Greystone Books

Greystone Books Ltd.

Groundwood Books Ltd

Heritage House

House of Anansi Press Inc

Inanna Publications

Invisible Publishing

Les Presses de l'Université d'Ottawa

Linda Leith Publishing

MQUP

NeWest Press

Nimbus

Nimbus Publishing

Now or Never Publishing

Oolichan Books

Orca Book Publishers

Owlkids Books Inc.

Pajama Press Inc.

Playwrights Canada Press

Quattro Books

Red Deer Press

RMB | Rocky Mountain Books

Ronsdale Press

Second Story Press

Second Story Press - The Azrieli Foundation

Signature Editions

The University of Alberta Press

Thistledown Press

Three O'Clock Press

Touchwood Editions

Turnstone Press

UBC Press

University of Calgary Press

University of Manitoba Press

University of Ottawa Press

University of Ottawa Press - Canadian Museum of Civilization

University of Ottawa Press - Canadian Museum of History

University of Ottawa Press - Harvest House

University of Regina Press

Véhicule Press

Whitecap Books Ltd.

Wilfrid Laurier University Press