



International Library Lending Practices for Digital Titles



Livres
Canada
Books



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Introduction

This research report provides a comprehensive overview of international library lending practices for digital titles. It also describes both the opportunities and challenges faced by Canadian publishers working to sell to international library markets.

The library markets in question include those in France, Germany, Spain, the United Kingdom, and the United States of America. The research sought information from organizations managing library sales in these markets. Core topics include information about library purchasing decisions, coupled with guidance that will help Canadian publishers promote discovery and sales (acquisition) of their titles.

During of this project, questions have also been posed by members of the Canadian publishing community. Those questions have been answered in the report, in the sections that best describe the content of the question. The project began with a webinar that explored how international libraries are balancing increasing demand for ebooks from library patrons by working with publishers to consider business models that promote discovery and help libraries manage acquisition costs. This report is part of a larger project that offers strategies for publishers who are looking to increase their visibility and digital book sales across international library markets.

Current approaches, trends, and concerns

Global interest in both English-language and French-language content has been growing, both with direct sales as well as sales through libraries. In a global market, there's a significant opportunity to use metadata to market books to libraries. It's an opportunity that some publishers are missing because their metadata has not been written with libraries in mind, or it's incomplete in a way that prevents libraries from understanding and acquiring a book. As Canadian publishers work to increase their sales of digital books to international libraries, an early priority should be to verify that their title metadata supports their objectives.

This is a useful time for Canadian publishers to work on selling digital content to international libraries. In the United States, digital reading has not replaced print, but it appears to have leveled off somewhere between 15–20% for trade titles. Digital share is a higher percentage for educational content. Market penetration for digital sales is highest in the US and UK, but it appears to be growing elsewhere. As digital reading (and digital lending) moves toward tablets and mobile devices, the share of digital consumption is expected to rise.

Fulfillment costs for digital books are lower than for physical books. It's easier to get digital books to different marketplaces, often at the same time across multiple markets. But along with those opportunities, there are challenges. Partners differ by market. This is not a new phenomenon for anyone familiar with the work that Livres Canada Books has done in the past. In every international market, there are major players, offering different ways to get visibility and sales in different markets.

Data alignment

Finally, it's important to align publisher (title) metadata with the records that libraries use to evaluate potential purchases. The research indicated that the top roadblock to an acquisition is the absence of high-quality metadata. Librarians stressed that they are not looking at a book, but rather at its metadata, which drives discovery for the library. Metadata in the supply chain itself, which is typically ONIX, needs to be complete and accurate. Elements like grade range and age range make a big difference there.

If the metadata is not accurate, then the library is less likely to find a book. If the metadata is inaccurate and they do find the book, purchase it in error and find that it's not the right resource for them, the pushback can be substantial. Canadian publishers are already familiar with ONIX and MARC, the library catalogue standard. While compatible, they are not the same thing, as libraries use MARC for cataloging. So once a book is ready to be published it should be affiliated with a coherent and comprehensive MARC record. Supporting a good MARC record is an important piece of getting a book catalogue in a library. Companies like BDS in the UK can create MARC records on behalf of publishers.

In the UK, concerns about incomplete or misleading MARC records was a common theme. Errors lead to re-keying data or amending records. A weak MARC record forces libraries to help users find resources that the library holds but aren't findable without a complete MARC record. In researching the issue, one industry veteran claimed that as much as 15% of all queries to help desks at a given library are from users having trouble finding the resource they need. In such cases, the resource exists in the library, but it's not cataloged in a way that makes it discoverable. Inadequate records within the library catalogue typically have to be removed or updated. Publishers with ebook collections whose MARC records aren't good enough suffer, as their books are generally not discovered, and subsequently they do not get acquired.

Opportunities and challenges for Canadian publishers

Canadian publishers can take advantage of several opportunities in the international library market for digital content:

- Although sales of digital content appear to have plateaued in the US market, the share of digital content in other international markets remains well below that seen in the US. This suggests that a significant upswing in the sale of digital content to libraries is possible.
- Underlying demand for digital content from libraries has been increasing, driven in part by the widespread use of tablets and mobile devices for digital reading. Platforms that support library lending of digital content have added apps that work on these platforms.
- Digital content has spurred the development of a range of library lending business models, some of them favourable to specialty and smaller publishers. The cost of entry is essentially the combination of high-quality metadata and a commitment to trying various models to see what works for the publisher.
- Starting in 2025, the European Accessibility Act will raise the bar for books that can be sold in the EU. The Canadian commitment to accessibility over the past several years means many Canadian publishers will be ready to meet the new requirements.