

# BOOK BORROWING IN THE CANADIAN LIBRARY MARKET

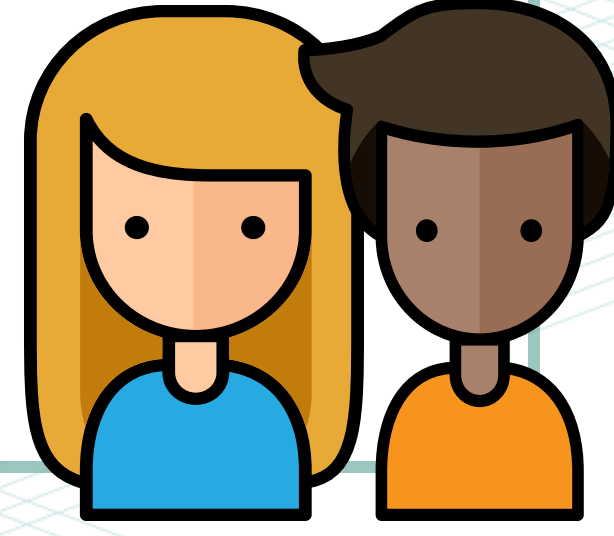
## WHO ARE CANADIAN BORROWERS?

In 2018, 28% of adult English-speaking Canadians reported that they had checked out, or borrowed, at least one book in any format from a public library in the past year. They checked out a total of 13,373 books: 82% were print books, 13% were ebooks, and 5% were audiobooks.

Demographically, the average Canadian borrower is:

- a woman (58%);
- in her mid-fifties (on average);
- partnered (59%);
- living in central Canada (58%);
- not living with kids (51%);
- a university graduate (51%); and
- living in an urban area (47%).

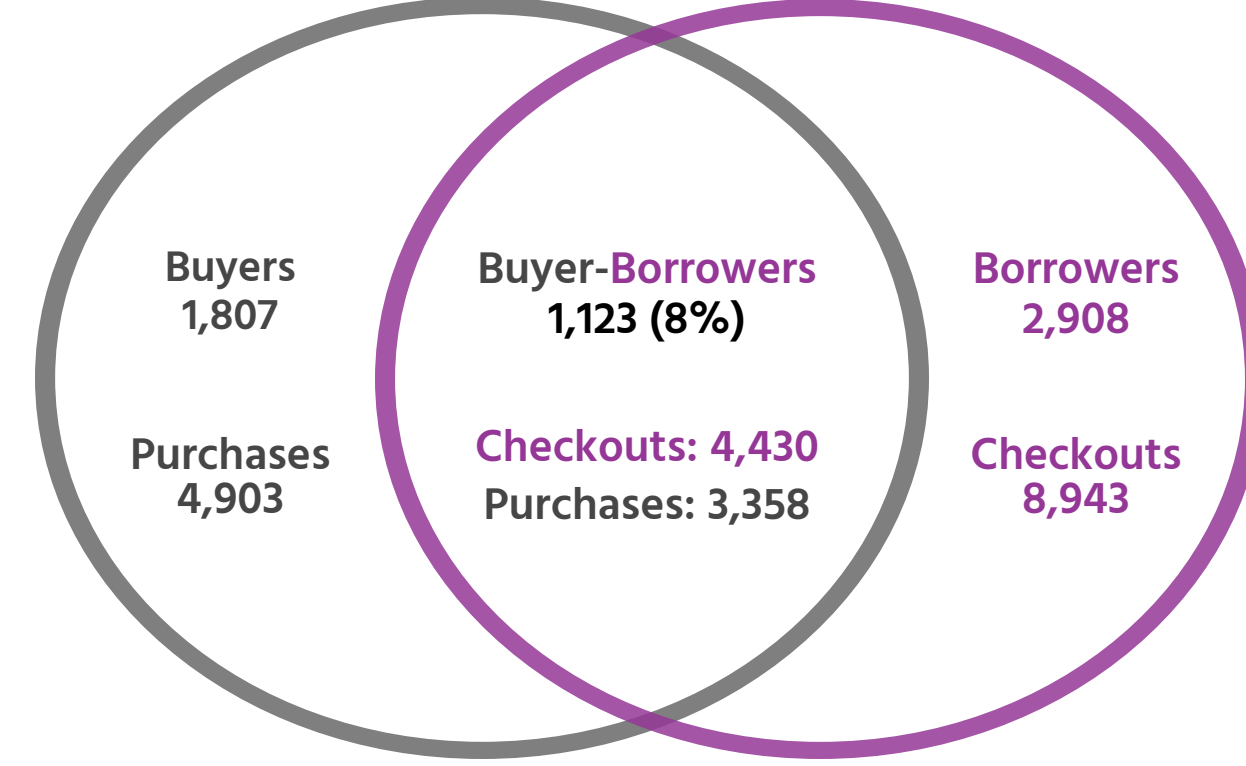
Source: BookNet Canada's Canadian Book Consumer survey, 2018



## BUYER-BORROWERS

In 2018, out of adult English-speaking Canadians:

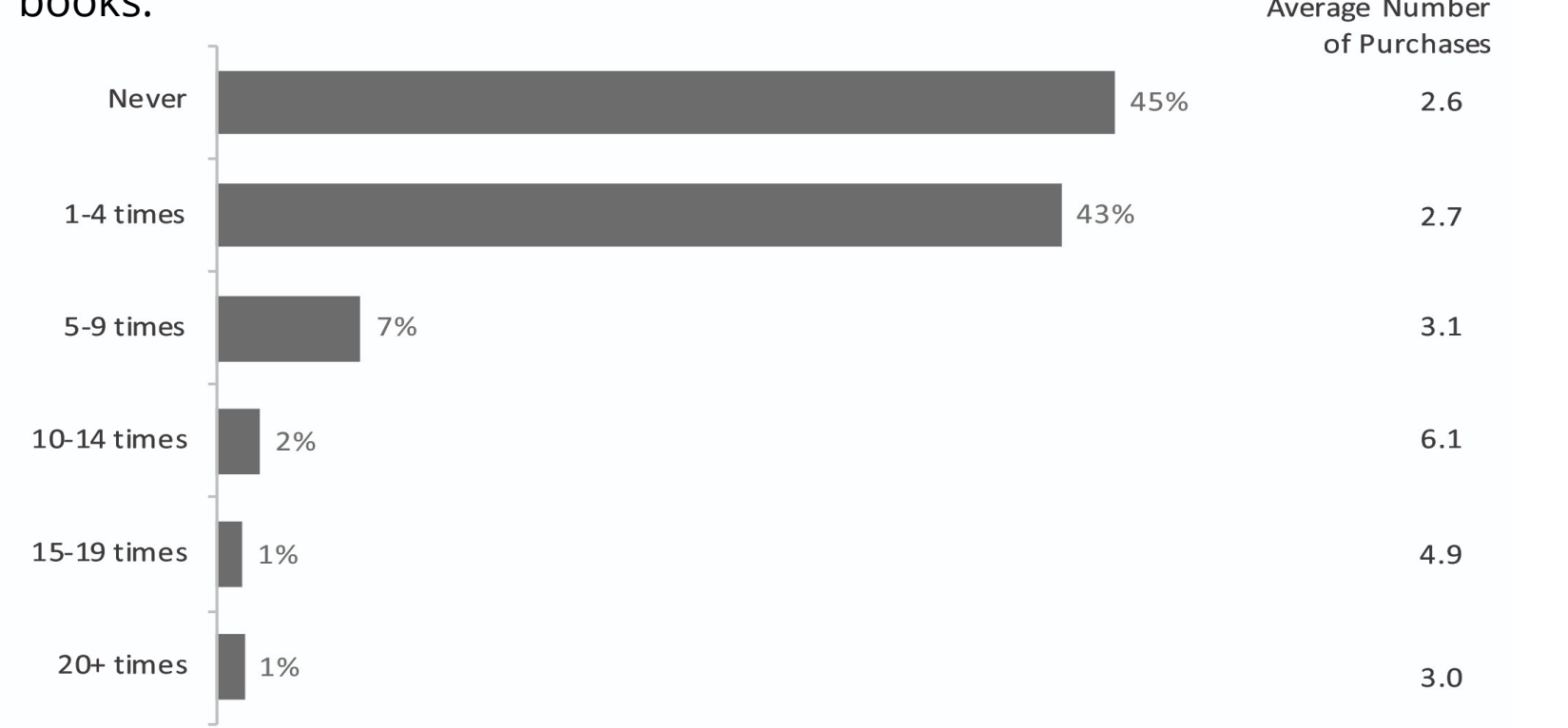
- 28% checked out at least one library book, either online or in person (**4,031 borrowers**) → the purple circle on the right of the venn diagram below
- 21% bought at least one book (2,930 buyers) → the grey circle on the left of the venn diagram below
- 8% checked out and bought at least one book (buyer-borrowers)



Source: BookNet Canada's Canadian Book Consumer survey, 2018

## BUYERS: MONTHLY LIBRARY VISITS & AVERAGE PURCHASES

- Buyers bought an average of 2.8 books a month.
- Buyer-borrowers bought an average of 3.0 books a month.
- Buyers who visited the library at least once in the last month bought an average of 3.0 books.
- Buyers who had not visited the library in the last month bought 2.6 books.



Question: How many times did you visit a public library (in person or online) in the last month?

Source: BookNet Canada's Canadian Book Consumer survey, 2018

## DIGITAL READING

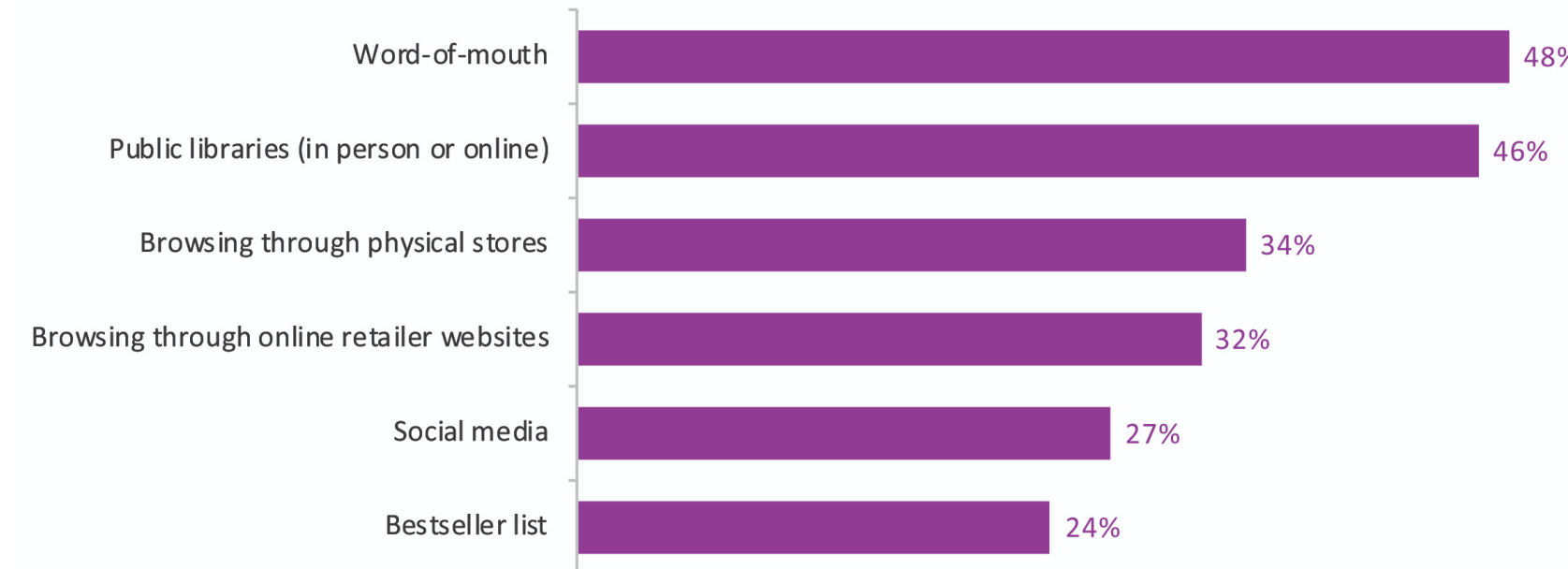
We asked adult English-speaking Canadian ebook borrowers what device they used for ebook reading. Among those who borrow ebooks from the library, tablets are the most popular device for digital reading (32%). E-readers are a close second, with 29% of borrowers using them, followed by smartphones (22%) and computers (17%). When it comes to apps for digital reading, 26% of borrowers use an internet browser and 20% read ebooks on OverDrive/Libby.

Source: BookNet Canada's Leisure & Reading survey, 2018

"At this point in my life I really enjoy audiobooks and wish there were a larger selection at libraries"

## BORROWERS MAINLY DISCOVER BOOKS THROUGH WORD-OF-MOUTH & LIBRARIES

The most popular way adult English-speaking Canadian borrowers discover books they buy or read/listen to is through word-of-mouth (48%) and public libraries (46%). When it comes to library borrowers finding the books they want, the majority of borrowers "often" or "always" find the books and other materials they are looking for (77%). Either finding materials in the library is really easy, or more than 75% of borrowers are determined or asking for help. About one in five borrowers "sometimes" find what they are looking for while only 1% "rarely" or "never" do.



Question: How do you generally discover the books (of any format) that you purchase and/or read or listen to? (Select all that apply.)

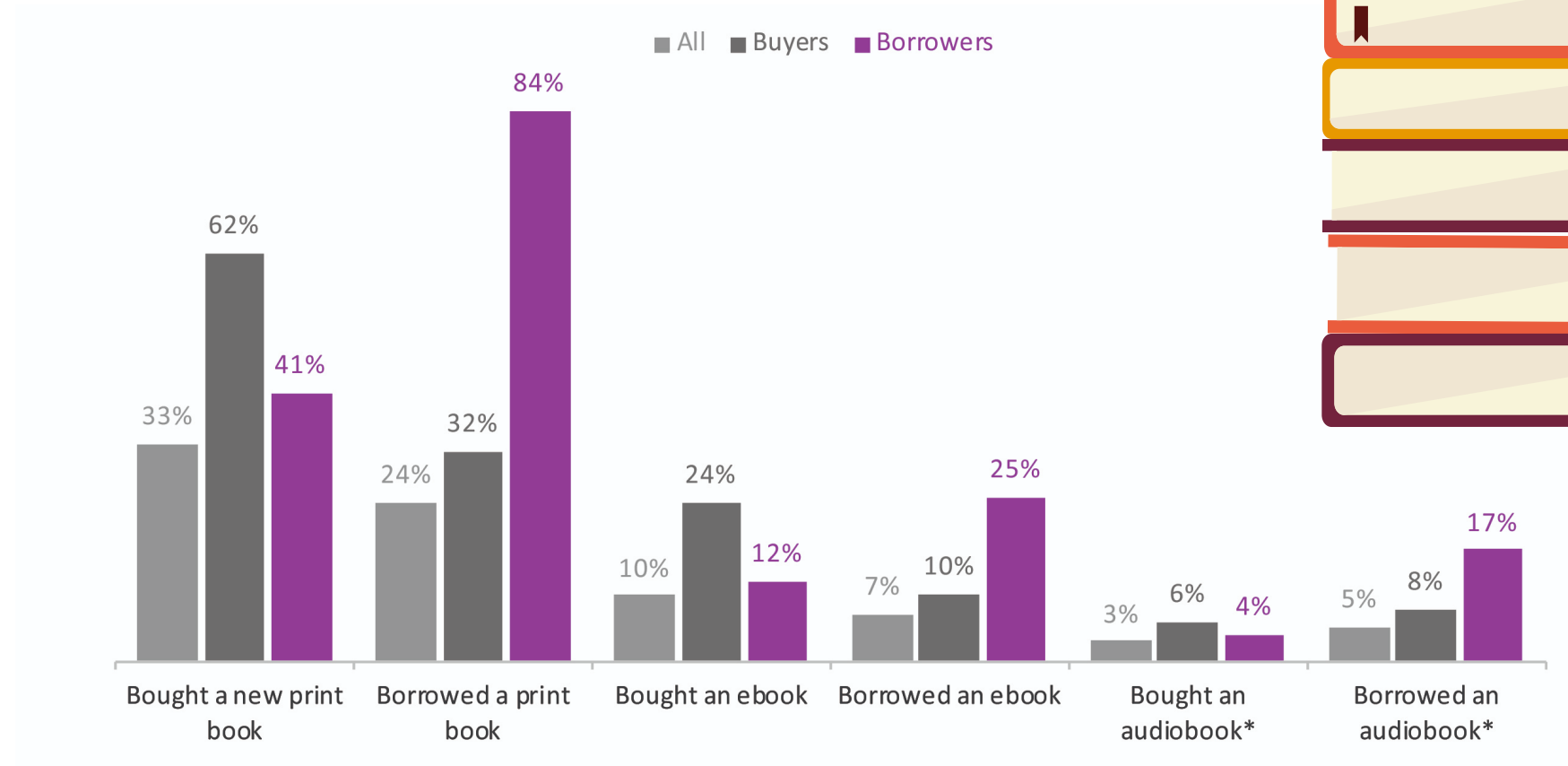
Other ways borrowers discover books are online communities like Goodreads (15%), literary awards (15%), book clubs and reading groups (10%), and e-reading apps (9%).

Source: BookNet Canada's Leisure & Reading survey, 2018

## BORROWERS CHECK OUT MORE PRINT BOOKS

We asked adult English-speaking Canadians to select the ways in which they generally obtained books in the prior year. Unsurprisingly, borrowers checked out books more than buyers did: 84% of borrowers borrowed a print book while 32% of buyers borrowed a print book. This difference is similar for ebooks and audiobooks. Looking just at buyer-borrowers:

- 62% bought a print book
- 12% bought an ebook
- 4% bought an audiobook



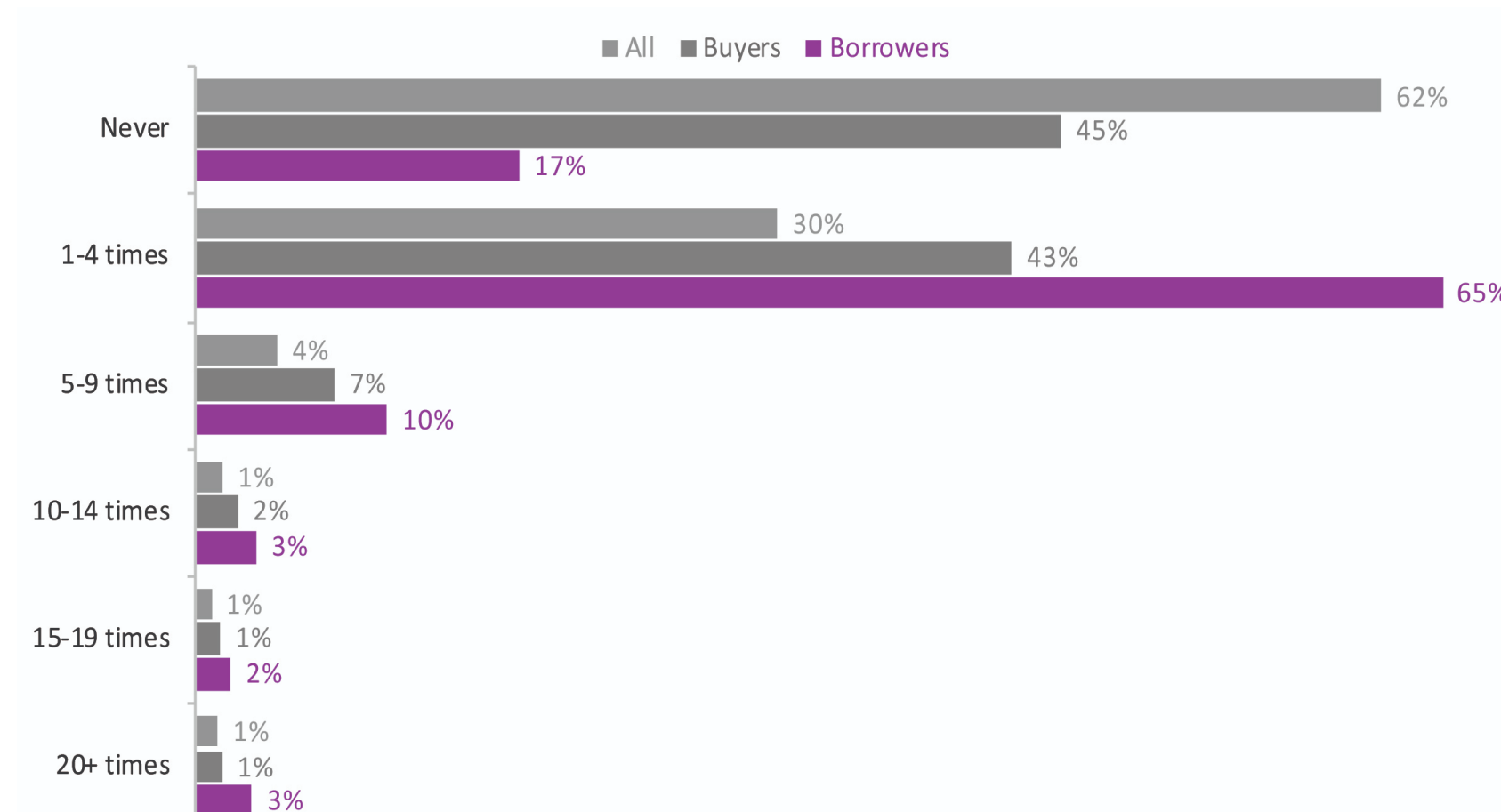
\*Data from June to December 2018

Question: In which of the following ways have you obtained books in the last 12 months, either for yourself or for someone else?

Source: BookNet Canada's Canadian Book Consumer survey, 2018

## MOST BORROWERS VISIT THE LIBRARY 1-4 TIMES A MONTH

In our consumer survey, 39% of adult English-speaking Canadians and 83% of borrowers (i.e., those who had borrowed at least one book in the last year) reported that they visited the library in person or online at least once in the last month. NOTE: There are respondents who had not visited a library in the last month ("Never") but reported having borrowed a book in the last year.

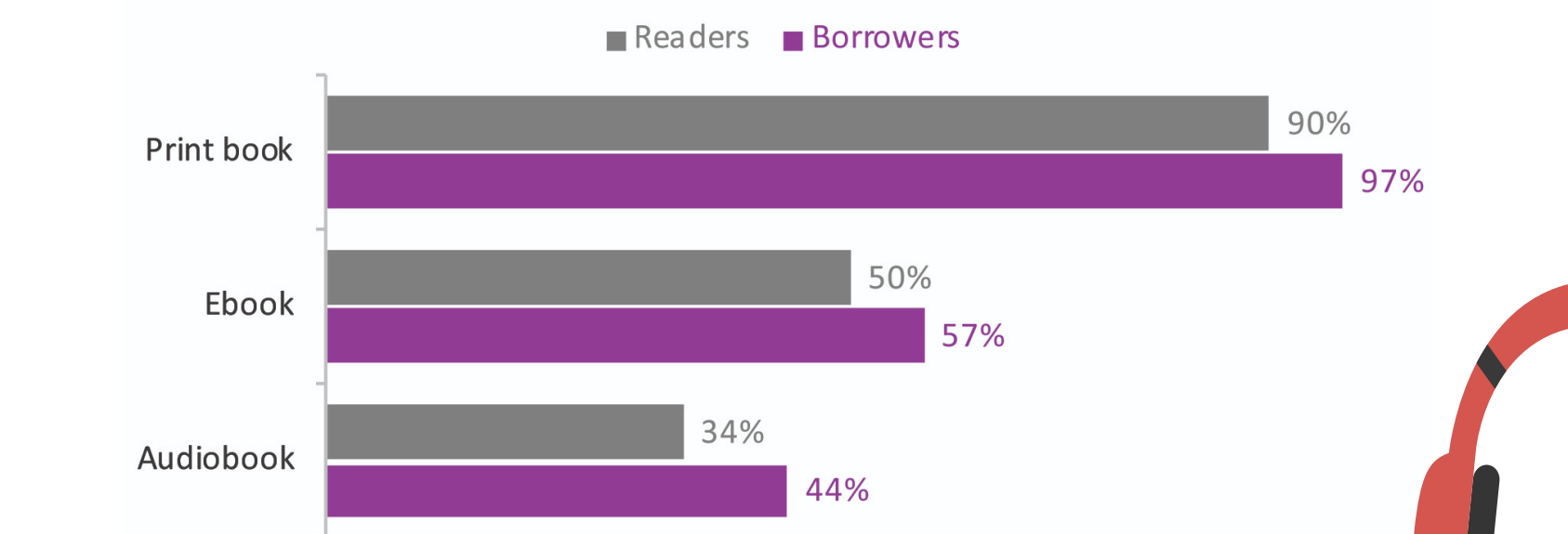


Question: How many times have you visited the public library (in person or online) in the last month?

Source: BookNet Canada's Canadian Book Consumer survey, 2018

## READERS WHO BORROW CONSUME MORE OF EACH BOOK FORMAT

We asked adult English-speaking Canadians if they had read a print book, an ebook, and/or an audiobook in the last year. "Readers" are those who reported that they had read a book in any of these formats and "Borrowers" are a subset of that group. Library borrowers consistently answered "yes" for each format at a higher percentage than did readers overall.



Questions: Did you read a print book (not audio or electronic/digital book) in the last year? Did you read an ebook in the last year? Did you listen to an audiobook in the last year?

Source: BookNet Canada's Leisure & Reading survey, 2018

"I prefer library use to buying books. If I need to buy, I prefer ebooks."

## DISCOVERING BOOKS PURCHASED

The three main ways adult English-speaking Canadian buyer-borrowers become aware of the books they buy are:

1. Having previously read other books by the same author (23%)
2. Browsing (22%)
3. Recommendations or reviews (19%) — and of those recommendations/reviews, 3% were received from library staff, which is 0.7% more than for all buyers

Buyer-borrowers tend to buy books because they like the subject (28%) or the author (28%). Other popular reasons borrowers buy books is because of the book description (20%), the series (19%), or a low price (17%), while 7% of their book purchases were gifts.



Question: What made you decide to buy this book?

Comparing to purchases made by buyers, 26% were made because they liked the author, 15% because of the low price, and 4% because buyers had read the book before.

Source: BookNet Canada's Canadian Book Consumer survey, 2018

"Being able to have access online to local public libraries is essential as I travel a lot. Love the convenience."

## BACKLIST BOOKS ARE MORE POPULAR AT THE LIBRARY

Comparing backlist and frontlist titles in SalesData and LibraryData, we found that books tend to stay popular for a longer time in the library: 75% of loans were for backlist titles (i.e., books that had been published more than one year previous). 55-60% of sales were for frontlist titles, compared with 25% of loans.

Source: BNC's SalesData and BNC's LibraryData, June to December 2018

## POPULAR SUBJECTS IN LIBRARIES VS RETAIL

The Canadian public library market reported more than 8.5 million loans to LibraryData over the last seven months in 2018:

- 48% Juvenile Fiction & Young Adult
- 27% Adult Fiction
- 25% Adult Non-Fiction

Looking at the number of unit sales and loans from June to December 2018, we found that certain subjects are more popular in the library market than in retail, and vice versa. Unsurprisingly, Juvenile Fiction and Adult Fiction / Thrillers topped the lists for both SalesData and LibraryData.

RETAIL	LIBRARIES
1. Juvenile Fiction / Humorous Stories	1. Juvenile Fiction / General
2. Fiction / Thrillers / Suspense	2. Fiction / Thrillers / Suspense
3. Fiction / Literary	3. Juvenile Fiction / Humorous Stories
4. Juvenile Fiction / Media Tie-In	4. Juvenile Fiction / Action & Adventure / General
5. Biography & Autobiography / Personal Memoirs	5. Juvenile Fiction / Comics & Graphic Novels / General
6. Fiction / Women	6. Fiction / Literary
7. Juvenile Fiction / General	

## Adult Fiction & Non-Fiction

Let's take a dive into Adult Fiction and Non-Fiction to see the 10 most popular subjects in terms of loans, purchases, or both from June to December 2018.

RETAIL	LIBRARIES	BOTH
• Fantasy / Epic	• Thrillers / General	• Thrillers / Suspense
• Thrillers / Psychological	• Romance / General	• Literary
• Mystery & Detective / Police Procedural	• Mystery & Detective / Women Sleuths	• General
		• Women
		• Mystery & Detective / General
		• Historical / General
		• Romance / Contemporary
• Sports & Recreation / Hockey	• Education / General	• Comics & Graphic Novels / Manga / General
• Cooking / Methods / Quick & Easy	• Humor / Form / Comic Strips & Cartoons	• General
• Political Science / American Government / Executive Branch	• Biography & Autobiography / General	• Comics & Graphic Novels / Superheroes
• Business & Economics / Leadership	• Crafts & Hobbies / Needlework / Knitting	• Biography & Autobiography / Personal Memoirs
• Self-Help / Personal Growth / General	• Comics & Graphic Novels / General	• Cooking / General
		• Self-Help / Motivational & Inspirational

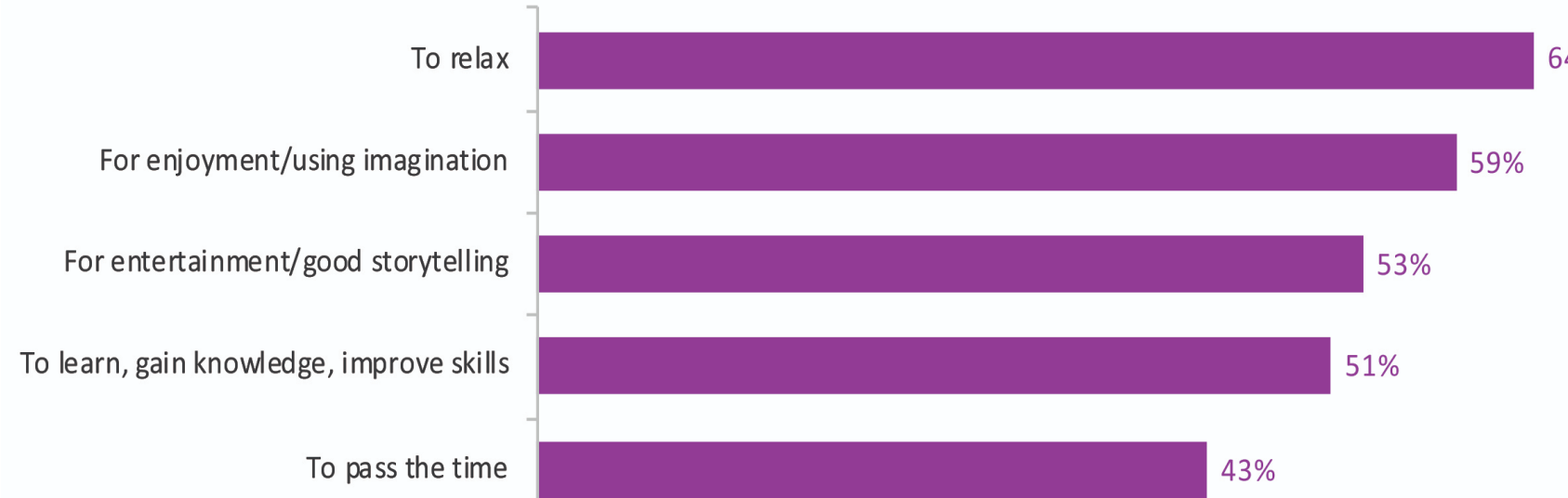
Top subjects borrowed and bought for Juvenile and Young Adult can be found in the study *Borrow, Buy, Read* ([booknetcanada.ca/borrow-buy-read](http://booknetcanada.ca/borrow-buy-read)).

Source: BNC's SalesData and BNC's LibraryData, June to December 2018

## WHY DO BORROWERS READ?

Canadian borrowers read for the same reasons all readers do, with the top reasons being to relax (64%), followed by enjoyment or to use their imagination (59%). But some reasons for reading were more popular with borrowers than with all readers:

- More borrowers read to learn (51%) than do all readers (46%).
- Reading mainly to discover topics or to become immersed in another world was more popular with borrowers (41%) than with all readers (36%).
- Borrowers read mainly for inspiration/motivation (36%) more than all readers do (29%).
- More borrowers read mainly for work or study (26%), compared to 19% of all readers.



Question: What were your main reasons for reading? (Check all that apply.)

Borrowers also read to escape reality (37%), for intellectual stimulation (31%), and for brain health (28%).

Source: BookNet Canada's Leisure & Reading survey, 2018

## Where did we get the data from?

1 BookNet Canada's Canadian Book Consumer survey – This quarterly survey asks about book discovery, book purchasing, and library use to English-speaking adults (18 and older) from across Canada who are representative of the Canadian population based on age, gender, and geographical location.

- The 14,159 respondents surveyed throughout 2018 are referred to as "all respondents."
- 21% bought at least one book in the past year and are referred to as "buyers."
- 28% checked out at least one book in the past year and are referred to as "borrowers."
- 8% bought and borrowed at least one book and are referred to as "buyer-borrowers."
- 59% neither bought nor borrowed a book in the past year.

There is a margin of error of 0.83% for "all respondents," meaning that statistics for this group could fluctuate about 1% in either direction if this survey were fielded to the entire Canadian population. Specific groups and questions may have a smaller sample size and a different margin of error.

2 BookNet Canada's Leisure & Reading survey – This annual survey asks 750 English-speaking adults (18 and older) from across Canada who are representative of the Canadian population based on age, gender, and geographical location about their free time and leisure activities. Readers are asked about their book-related habits, library use, and how they discover and acquire books.

- 78% of respondents read or listened to at least one book in the past 12 months and are referred to as "readers."
- 56% of readers used a public library (in person or online) in the last year and are referred to as "library users."
- 80% of library users checked out at least one book in the past year and are referred to as "borrowers."

There is a margin of error of 3.58% for "readers," meaning that statistics for this group could fluctuate about 4% in either direction if this survey were fielded to the entire Canadian population. Specific groups and questions may have a smaller sample size and a different margin of error.

3 BNC SalesData – This service tracks print sales for an estimated 85% of the Canadian English-language trade book market. SalesData is used to investigate market trends, identify sales opportunities, plan book orders, and more. We used 2018 data for this study.

4 BNC LibraryData – This is a forthcoming library circulation tool that examines loans, holds, renewals, books on order, and collection holdings data in Canadian libraries. LibraryData gives libraries the ability to compare information between their branches and other participating library systems.

LibraryData will be integrated with SalesData once launched, allowing users to compare library circulation to the retail market. For this study, we used a limited data sample available from June to December 2018. <https://www.booknetcanada.ca/librarydata>

