

ALDUS|UP

EUROPEAN BOOKFAIRS' NETWORK

SURVEY ON READING HABITS

IN EUROPE: STATE OF THE ART

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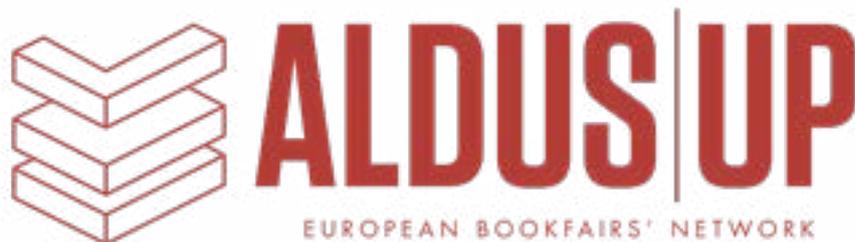
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EXECUTIVE SUMMARY

While reading is the subject of a large number of surveys in the different European nations, it is often difficult to compare the individual results and put them into perspective as they not only tend to focus on various topics within the field of reading, but – more importantly – they also make use of different methodological approaches.

Therefore, one of the objectives of the AldusUp project is to develop a unified methodology for surveys on reading habits in Europe. As the first step in this direction, it is important to collect and analyse data on the methodological approach of surveys that have already been conducted. That is why a survey on the methodologies of European reading surveys was designed and its results evaluated.

The following report gives an overview of the current state of the art of this research. The first chapter describes the methodological approach used to receive information about the methodologies of existing reading surveys in Europe. It covers the development of the

survey, the composition of the sample and the evaluation of the results. The second chapter analyses the results of the survey by looking at the areas of data collection, sample, reading variables, book formats and the definition of reading applied. The report concludes with an outline of the next steps and the discussion points which need to be considered in order to create a unified methodology for a Europe-wide applicable survey on reading habits as well as to develop a possible pilot survey.

This is a basic step in a process the final result of which will be the proposal of a unified methodology for reading surveys as well as a pilot survey evidencing its operativeness. Moreover, reading surveys and their results will be related to normative considerations on how and what to read, attempts to explain behaviour as well as changes in behaviour and overarching current developments with respect to reading/book reception, e.g., audiobooks and reading from screens.

1. METHODOLOGICAL APPROACH

1.1. Development of the survey

Since “there is no standardized methodology, or standardized definitions, that will allow comparisons to be made among national book industries and generate an overview of global trends in publishing and reading” (pp. 9f.) as Kovač et al. (2017) stated in their article on book statistics, one of the aims of Aldus Up is to develop a common methodology for reading surveys in Europe.

To achieve this, it is necessary to collect and compare the methodologies and criteria adopted by already existing surveys in the different European countries. Based on the previous analysis of the methodological approaches of various surveys already conducted¹, an explorative survey was developed aimed at getting a detailed overview of the factors and variables considered in European reading surveys.

The survey was realised in English and created as an online questionnaire with the tool Survey Monkey. The structure and layout of the questionnaire was kept

simple with one question displayed at on page. In order to simplify the response process for the participants on the one hand and allow for a structured evaluation on the other hand multiple-choice questions were the preferred type of questions. These were complemented by the possibility to specify other answer options in an open textbox. In this way it was made sure that new or uncommon concepts regarding the analysis of reading habits were depicted.

Together with an accompanying text explaining the aim of the survey and the email address of the responsible person to contact in case of questions, the link to the questionnaire was sent to the contacts of the Aldus Up network² as well as the members of the Federation of European Publishers (FEP)³ on 16th of February 2021. An email with a personal reminder to fill in the questionnaire was sent out at the end of the following week. The data collection was terminated on 15th of March 2021.

1 For a broad overview of different types of surveys on reading behaviour in various countries see Hegdal, Å. (2020). Reading Matters. Surveys and campaigns: How to keep and recover readers. International Publishers Association/Norwegian Publishers Association. <https://www.internationalpublishers.org/state-of-publishing-reports/reading-matters-surveys-and-campaigns-how-to-keep-and-recover-readers>

2 Aldus Up network <http://www.aldusnet.eu/network/>.

3 FEP members <https://fep-fee.eu/-Members->.

1.2. Composition of the sample

Overall, 21 of the 32 countries addressed completed the survey which represents a response rate of 66%. With Austria, Belgium, Germany, Greece, Italy, Latvia, Lithuania, Portugal, Romania, Slovenia, Spain and Sweden as well as the non-EU countries Norway, Turkey and the UK, the majority of the Aldus Up partners and associated members answered the questionnaire. Additionally, Estonia, Finland, France, Luxembourg, the Netherlands and Poland could be reached through the FEP network.

It proved difficult to get answers from countries which are neither directly connected to Aldus Up nor FEP as there are no personal contacts. In order to get an even more diverse picture of the surveys on reading habits in Eu-

rope an additional desk analysis was undertaken to identify surveys for countries not yet represented in the sample. In this way it was possible to add data for Bulgaria¹, the Czech Republic² and Hungary³.

Apart from that, data on a second survey from Italy⁴ was included as it was indicated as another important reading survey in a comment made in the questionnaire. All in all, data from a total of 24 countries could be collected either directly through the survey or by implementing information from the desk analysis. For five of these countries – Austria, Finland, France, Italy and Norway – more than one relevant reading survey was determined.

1 Belcheva-Petrova, D., Brynova, P. (2018). Демография на четенето на книги в България. Резултати от национално представително изследване на общественото мнение [Demography of book reading in Bulgaria. Results from a nationally representative survey of public opinion]. Open Society Institute. <https://bit.ly/2RZAXSQ>

2 National Library of the Czech Republic/Nielsen Admosphere (2018). Readers and reading in the Czech Republic 2018. https://ipk.nkp.cz/docs/ctenarstvi/reading_2018

3 Bernát, A., Hudácskó, S. (2020). Könyvolvasási és könyvvásárlási szokások 2020 [Book reading and book buying habits 2020]. TÁRKI Social Research Institute. https://mkke.hu/content/download/7771/53994/file/TARKI_olvasas2020_tanulmany.pdf

4 Istituto nazionale di statistica (2021). Produzione e lettura di libri in Italia – Anno 2019 [Production and reading of books in Italy – Year 2019]. https://www.istat.it/it/files//2021/01/REPORT_LIBRI-REV_def.pdf

1.3. Evaluation of the results

In the next step the data collected in the survey and within the desk analysis was adjusted to achieve a balanced weighting of the results. Firstly, answers were excluded where the participants indicated that there are no relevant reading surveys in their countries.

The same applied to questionnaires where the answers were either incomplete in such a way that an evaluation would not make sense, or the participants stated that they do not have any knowledge about surveys on reading habits in their countries and therefore could not provide any more answers than that. Apart from that, international multi-country surveys the participants mentioned, e.g., PISA, were not taken into account either.

All things considered, data on 24 surveys from 20 countries – namely Austria, Belgium, Bulgaria, the Czech Republic, Finland, France, Hungary, Italy, Latvia, Lithuania, the Netherlands, Norway, Poland, Portugal, Romania, Slovenia, Spain, Sweden, Turkey and the UK – were considered in the evaluation.

Statistically spoken the results and percentages outlined in the following analysis are not representative for all the surveys on reading habits conducted in Europe. As the survey aimed to examine the methodologies and criteria adopted by existing reading studies in a qualitative and explorative approach the data nevertheless can be seen as an indicator for the most common characteristics of European reading surveys.

2. OVERVIEW OF EUROPEAN READING SURVEYS

2.1. Data collection

The surveys on reading habits examined in this report were initiated by one of three main groups: governmental organisations, mostly different ministries, the National Institute of Statistics or the Na-

tional Library, followed by industry associations like publishers', booksellers' or authors' organisations and non-governmental organisations such as charities or university research centres.

Initiators of the reading surveys	Number of surveys
Governmental organisations	11
Industry organisations	8
Non-governmental organisations	5

Table 1. Initiators of the reading surveys.

The actual data collection for the surveys was either conducted by the different organisations themselves, or associated organisations respectively, or commissioned to professional market research companies.

Organisations responsible for the data collection of the reading surveys	Number of surveys
Organisations themselves	14
Market research companies	10

Table 2. Organisation responsible for the data collection of the reading surveys.

The frequency of the data collection varies from survey to survey: While eight of the surveys are conducted in irregular time intervals with the last available data dating back several years in some cases, the majority is carried out regularly – either in intervals of one year, two years or five years. Two surveys form an exception here with a continuous tracking every six or even three months. From the annotations made by some of the participants it can be assumed that the frequency of the surveys oftentimes is determined by the financial and personnel position of the individual organisation which commissions the research.

Frequency of the reading surveys	Number of surveys
Irregular	8
Every year	8
Every two years	4
Every five years	2
More than once a year	2

Table 3. Frequency of the reading surveys.

The methodological approaches applied for the different data collections are dominated by personal interviews which are conducted equally either in person or via telephone. Questionnaires are the second largest category provided that online questionnaires nowadays are by far the most employed in comparison to the seldomly used paper questionnaires. Six surveys also make use of a mix of different methods by combining personal interviews with questionnaires to reach a broader range of participants.

Methodological approaches for the data collection of the reading surveys		Number of surveys	
Personal interviews		10	
In person	Via telephone	5	5
Questionnaires		6	
Paper	Online	1	5
Mix of methods		6	
I don't know		2	

Table 4. Methodological approaches for the data collection of the reading surveys.

The results of the reading surveys conducted by the above-mentioned organisations are generally presented in the local languages of the individual countries.

Only for three surveys the data on reading habits or at least a broad summary of the results is made publicly available in English as well.

Languages of the presentation of the results of the reading surveys	Number of surveys
Local languages	21
Local languages and English	3

Table 5. Languages of the presentation of the results of the reading surveys.

2.2. Sample

The sample size of the different surveys varies from several hundred people to over 50,000 whereas the average number of participants lies between 1,000 and 4,000. In almost all cases – except

for the four cases where the answer to this question was outside of the person's knowledge – the sample was representative for the population of the country where the survey was conducted.

Representativity of the sample of the reading surveys	Number of surveys
Representative	20
I don't know	4

Table 6. Representativity of the sample of the reading surveys.

The age of the participants who took part in the surveys on reading habits starts at 6 years old and in most cases is not limited to a maximum age. If the survey is

not focused especially on children, the youngest participants usually are 15 or 18 years old.

Age of the participants of the reading surveys	Number of surveys
18+ years old	6
16+ years old	2
15+ years old	9
Other	5
Children only	2

Table 7. Age of the participants of the reading surveys.

Regarding the socio-demographic variables applied in the surveys one can see that age (92%) and gender (83%) are the two key variables taken into consideration in the research. Over half of the surveys also ask for the place of residence

(71%), the education level (63%) and the socio-economic status of the participants (54%) whereas family status and ethnicity play a minor role with 25% or 13% respectively.

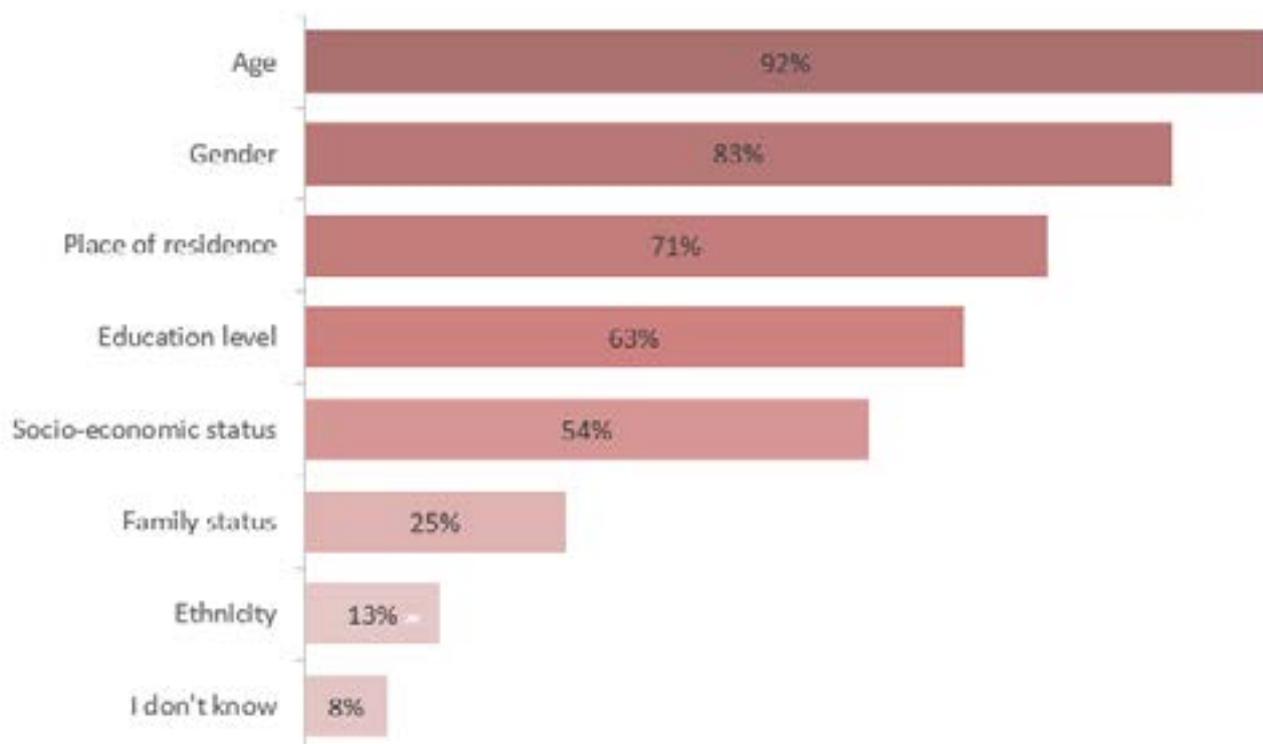


Figure 1. Socio-demographic variables used in the reading surveys.

2.3. Reading variables

Looking at the variables which specifically deal with the measuring of reading habits most surveys include the quantity of material read (79%) as well as the frequency of reading, e.g., reading every day, every week, once a month etc. (75%). Other important variables are the format of the material read (71%), the time spent reading (58%), the source of the reading material (58%) and the genre (58%). Approximately half of the surveys furthermore ask for the use of other, non-text-based media (54%), the inspiration sources to read a certain book (50%) as

well as the reasons for reading or not reading (both 50%). Of lesser importance are variables like other leisure time activities (38%), the amount of money spent on reading materials (33%) and the language of the material read (25%). Additional categories added by the participants of the questionnaire on reading surveys are the existence of certain technological equipment in the household, the use of the internet or social media, book promotions, specific popular books or authors and the reading behaviour of the parents.

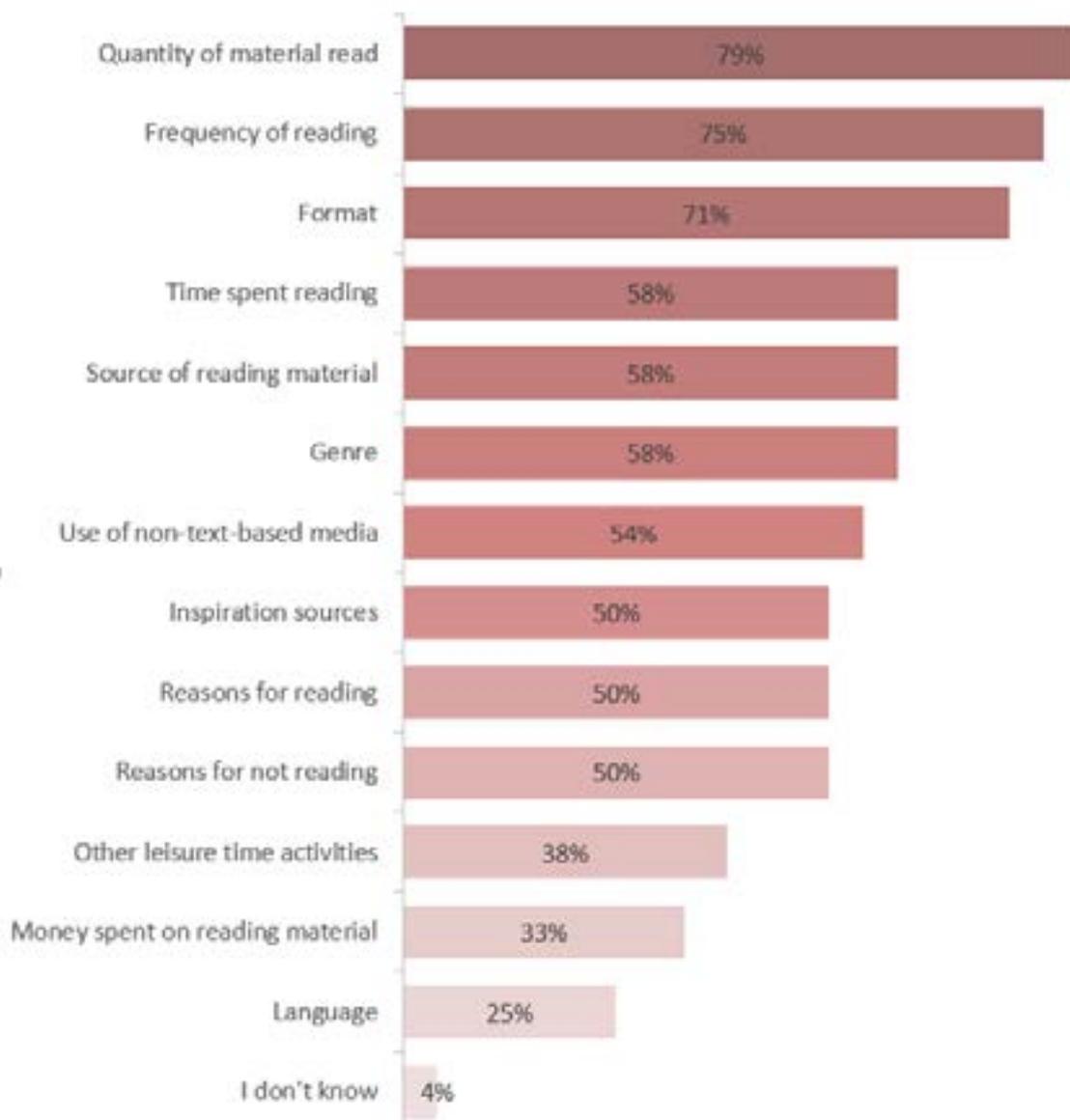


Figure 2. Variables regarding reading used in the reading surveys.

2.4. Book formats

Not surprisingly print books are the most common book format considered in in the different surveys with a proportion of 92%, closely followed by ebooks with 83%. Half of the surveys also include audiobooks as an object of their study.

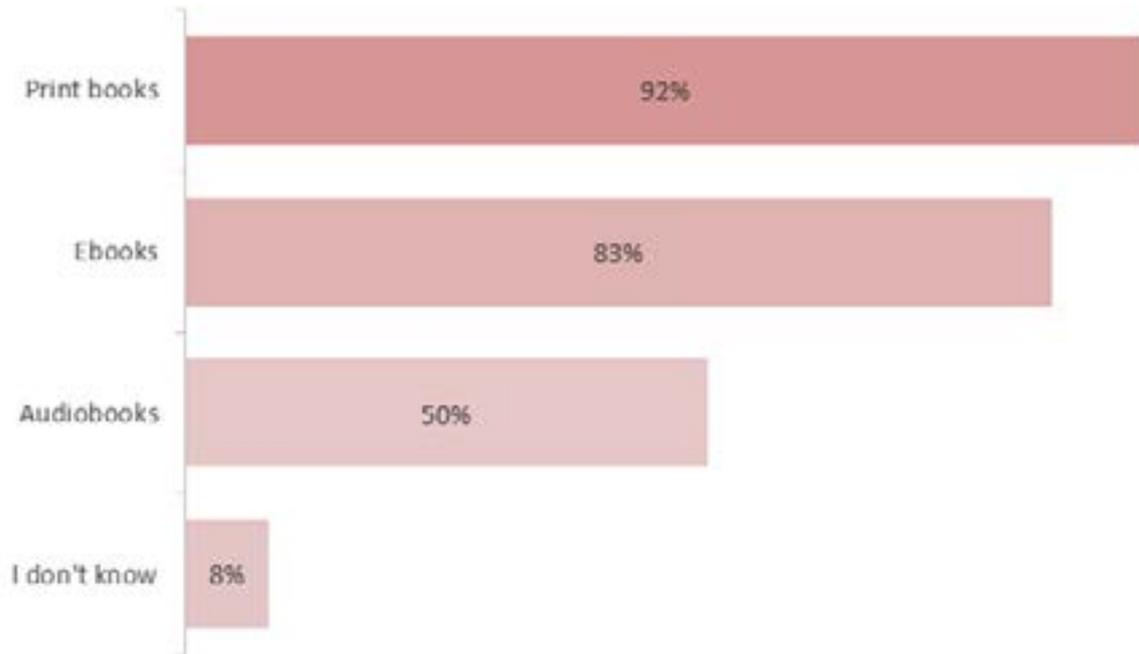


Figure 3. Book formats considered in the reading surveys.

In most cases the various book formats are looked at separately with print books, ebooks and audio books either building single categories or – less often – additional questions about one specific format like ebooks are added. In contrast four of the surveys do not differentiate between the book formats.

Differentiation between book formats in the reading surveys	Number of surveys
Formats looked at separately	15
No differentiation	4
I don't know	5

Table 8. Differentiation between book formats in the reading surveys.

Specific types of books are only excluded in seven of the surveys. Most of the times these comprise schoolbooks or university textbooks, but one survey specifically excluded books for children under 15 years old as well.

Exclusion of types of books in the reading surveys	Number of surveys
No types of books excluded	10
Types of books excluded	7
I don't know	7

Table 9. Exclusion of types of books in the reading surveys.

2.5. Definition of reading.

As reading not necessarily means reading books, one important question to ask was how reading is defined in the different surveys. While a third of the surveys refer to reading as only reading books of various formats, others also include reading

magazines and newspapers (both 50%) or websites and social media (both 33%) in their definition of reading. Reading letters or emails (13%) as well as reading manuals (8%) on the other hand is seldomly seen as reading.

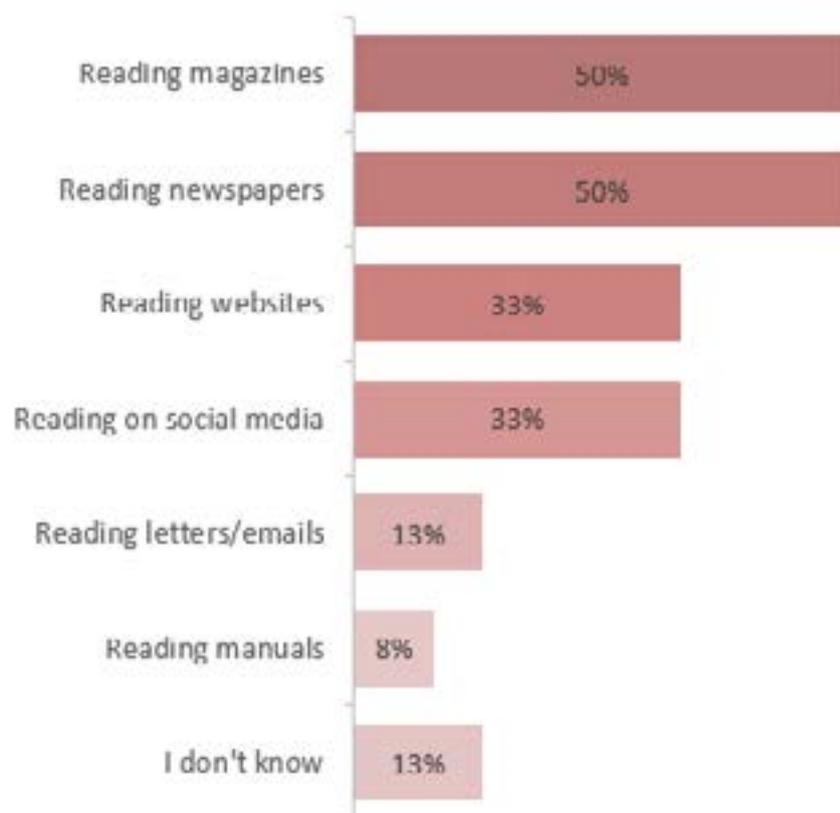


Figure 4. Forms of reading included in the definition of reading in the reading surveys.

3. NEXT STEPS AND DISCUSSION POINTS

The next step towards the development of a unified methodology for surveys on reading habits in Europe is to decide on a suitable approach and create a possible pilot survey. In order to achieve this, a discussion paper based on the findings of the conducted survey will be produced which will then be shared and discussed with various stakeholders from industry, authorities and academia to receive additional input from different points of view. Important parameters that could be taken into account in this discussion are the following:

Firstly, one must think of the best method for the data collection: While the majority of the surveys are using personal interviews, this is also the most expensive way to consult the participants of a survey. Online questionnaires on the other hand could exclude certain groups of a society, e.g., the older generation, from being represented in the survey as they might not have access or are not used to the internet.

Another key aspect to consider is the sample. It is important to vary the sample size according to the individual country as well as to apply a weighting corresponding to aspects like gender, age or education to get a representative depiction of the population and thus allow for a comparison between the different European nations.

Apart from that, there needs to be a discussion about the focus of the pilot survey as this determines the variables regarding reading which need to be examined. If the survey explores reading in relation to other media usage, one needs to ask for variables such as the use of TV or streaming platforms or the existence of technological hardware in the household. If the survey investigates long term developments on the other hand, one might rather want to know about the reasons for reading more or reading less.

Concerning the representation of different book formats one can say that it probably is a good idea to look at them separately – especially with the increasing popularity of non-traditional book formats like ebooks or audiobooks in some countries. In that way trends and the reasons for them can be depicted and compared.

Last, but not least, a fundamental decision about the definition of reading has to be made as this influences the whole construct of the survey. The main question is if the concept of reading in the research should be limited to reading books in a narrow sense, or if reading magazines, newspapers, websites or even tweets on Twitter or captions on Instagram are also part of it.

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