

Digital Books on the Point of Take-off?

The Ebook in Denmark Anno 2013

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Abstract

In this article we consider the present state of the ebook's diffusion. On the empirical basis of a national survey among Danes in 2013, we consider the volume, usage patterns, and demographics of ebook reading compared to paper book reading. Informed by diffusion theory and mediatization theory, the article concludes that the reading of ebooks is about to reach a "critical mass;" this development has not least been stimulated by factors outside the traditional

stakeholders of the book (national publishers and bookstores). Ebook reading is becoming part of a converging digital culture in which global media companies like Amazon, Apple, and Google play a key role for the standards and emerging infrastructure. In addition, Danish public libraries have played an important role for the diffusion of ebooks. The ebook usage patterns reflect influences from the presence of both Anglo-American media companies and national libraries.

Keywords ebook, book market, ebook users, Denmark, diffusion, mediatization.

Introduction

The digitalization of the book has for a long time been expected to revolutionize both the publishing industry and the culture of book reading. In particular, the emergence of dedicated ebook readers like the Kindle and Nook has been seen as an important catalyst for moving both publishers and readers into the digital age. In Denmark as well as in other Nordic and European countries, however, the spread of the ebook has been quite slow and has so far not evoked major changes in the publishing industry – at least not compared to the developments in USA and Britain where major media companies like Amazon, Apple, and Google have been highly successful in stimulating distribution and consumption of digital books (PricewaterCoopers, 2010). This ‘delayed’ adoption of ebooks compared to the Anglo-American world may have several reasons, including the size of national languages, public regulations of book markets, the type of dominant actors in the publishing field, and so forth (Rønning and Slaatta, 2012).

Due to a lack of both in-depth studies and detailed statistics about current developments in Denmark, it is difficult to decide the precise reasons for these differences, and even if – as this study suggests – the distribution of ebooks is about to reach “a critical mass” in a Danish context and may begin to ‘catch up’ with the Anglo-American diffusion, the factors behind the proliferation of the ebook may be somewhat different than the Anglo-American case. In this article, we will – on the basis of a nationwide survey of the use of ebooks in Denmark – examine the current proliferation of the ebook and consider some possible factors elucidating the present stage

of diffusion. The study is primarily descriptive and provides baseline data on ebook usage patterns in relation to a variety of demographic factors. Secondly, the study considers three specific questions concerning the use of ebooks:

- Does the reading of ebooks tend to substitute reading of paper books or is the reading of the two types of books mutually supportive practices?
- To what extent have dedicated ebook readers emerged as an independent platform for reading or does reading occur across a range of different digital platform, including general/multi-purpose computers and tablets?
- To what extent does the reading of ebooks encourage the reading of English language books?

Diffusion and mediatization

Thompson (2005, 2010) has rightly pointed to the fact that the digitalization of the book cannot be reduced to the emergence of the ebook. Instead, the process of digitalization has to be considered within a larger institutional framework and a longer historical timeframe in which stakeholders (for example, publishing houses, authors, book sellers, and the readers) and the various steps in the book's life circle (for example, writing, editing, printing, distribution, and reading) step by step has become influenced by digital technologies. From this perspective, the digitalization of the book has been under way for more than three decades; the production of the book, that is, the authors' writing and the publishers' editing and printing of books, has already been subject to important changes due to digitalization. Today, digitalization is entering the last steps in the book's life circle: the distribution and reading of books.

In this article, we use two strands of theory as a context for discussing the digitalization of the book: diffusion theory and mediatization theory. Diffusion theory (Rogers, 2003) suggests that the diffusion of technological innovations, in our case the ebook as a media technology, follows a characteristic S-curve formed by the successive adoption of the technology among different segments of the population. These segments may be described in relation to their willingness to adopt the technology and Rogers distinguishes between five groups: the innovators, early adopters, early ma-

majority, late majority, and laggards. Diffusion theory has been criticized, modified and further developed since Rogers's contribution (cf. Vishwanath and Barnett, 2011), but in this predominantly descriptive analysis, we only make use of the general propositions of diffusion theory as a context for discussing ebook developments.

Important in our context is the notion of "critical mass." At the initial stages of the diffusion of a technology, the adoption by individuals and organizations must be supported from the outside and may require strong incentives like persuasion by opinion leaders, economic subsidy, or public regulation in order to continue. At a certain point, the diffusion may become self-sustainable because a sufficient amount of people have adopted the technology, which in itself makes it attractive to others. At the same time, this level of diffusion is typically accompanied by higher level of knowledge about the technology, lower prices, availability of content, and so on. The reasons for adopting a particular technology may be manifold and may as Shin (2011) and Gerlach and Buxmann (2013) have demonstrated in the case of the ebook include both cognitive and emotional factors. Thus, diffusion of the ebook will not only be dependent on information about the phenomenon obtained through social networks and media but also on perceptions about whether or not the ebook will offer pleasurable reading experiences and the extent to which the technology is perceived as consistent with the individual's existing values and needs. 'Critical mass' is typically achieved when both of the two first groups, innovators and early adopters, have embraced the technology. In the USA, the diffusion of the ebook has been supported by major media companies like Amazon, Apple, and Google, and they have certainly also influenced diffusion in a Danish context. There are, however, also other social actors that have influenced the diffusion process in Denmark; in particular the public libraries have played an important role for making the access to Danish ebooks more widespread.

Mediatization theory (Hjarvard, 2013) may help explain why a cultural artefact like the book is increasingly influenced by factors outside the domain of the publishing industry, the literary institution, and the educational system. Since the invention of the printing press (Eisenstein, 1979), the book as a medium has always been at least partly dependent on a commercial market and popular demands for information and entertainment. Nevertheless, the pro-

duction and reading of fiction and factual books have to some extent been influenced by the national literary institutions and educational systems. The book acquired a privileged position vis-à-vis other media, being considered a medium of both high cultural esteem (literary value) and enlightenment (scholarly value). The digitalization of the book brings it closer to a converging popular media culture at the same time as the very process of digitalization is promoted by social actors outside the traditional circuit of the book. Digital standards, financial models and cultural norms concerning usage are increasingly decided in a converging media market in which the book is only one medium among others to be consumed on various multi-purpose media platforms. In this way, the digitalization of the book also involves a mediatization of the book. One important consequence of this development is, as PricewaterCoopers (2010, p. 3) suggests, that "in the future, publishers will need to position themselves as content providers, and not just the suppliers of physical books. They will have to make content available on multiple media, in multiple formats, on multiple platforms."

Emerging markets for ebooks

In the USA, the market for ebooks has increased significantly during the last few years: According to statistics from The Association of American Publishers, 457 million ebooks (general fiction and non-fiction for adults, youth and children) were sold in the trade book market in 2012 compared to 10 million ebooks sold in 2008. The market for ebooks grew 45% from 2011 to 2012 and constituted 20% of the overall trade market of books in 2012. Compared to earlier years, the growth rate of 45% is a bit more moderate, yet still profound (Association of American Publishers, 2013a; USA Today, 2013). The ebook sales not only grew inside USA but also on the global market for English language books. American publishers increased their net revenue from sales in non-USA markets with 7.2% to \$833,389 million from 2011 to 2012 (both paper books and ebooks). The relative growth in global sales was particularly high for ebooks: net revenue from American export of ebooks increased with 63% while print books only expanded with 1.3% in the same period. Europe is the leading foreign market for sales of American ebooks (Association of American Publishers, 2013b). The reading of ebooks increased from 16% of all Americans ages

16 and older in November 2011 to 23% in November 2012 (Rainie and Duggan, 2012).

Compared to the development in the USA, the ebook market in Denmark is still emerging, and no clear pattern of preferred distribution channels or reader technologies has yet been established. Likewise, the circulation of ebooks compared to that of ordinary books has so far remained modest. The sale of ebooks is, however, increasing in the Danish market, albeit at a slower pace. The annual statistics from the Danish Publishers Association (2013) demonstrates that the sale of digital materials (comprising ebooks, web portals and audiobooks, online as well as on dvd) rose from 2.6% of the total turnover in 2010, to 3% in 2011 and to 4.9% in 2012. The number of sold digital copies grew from 1,069,200 copies in 2011 to 1,910,700 copies in 2012; this should be compared to the total number of print copies sold in 2012 which was 20,838,800 copies. The total number of available Danish ebook titles is estimated to approx. 10,000 titles in 2012 (Danish Publishers Association, 2013). The internet is increasingly used for buying both paper books and ebooks. In 2000, less than 5% stated they had bought books on the internet but in 2012 this had increased to approx. 20% (Danish Association of Booksellers and Danish Publishers Association, 2012); these historical statistics do not allow a distinction between purchase of ebooks and paper books on the internet.

In Denmark, ebooks are not only circulated through commercial channels. The public libraries have also made substantial efforts to integrate the ebook in their repertoire, formulating different scenarios for the free, public lending of ebooks. These effort resulted in a highly popular service, eReolen ("The eBookshelf"), which allowed library users access to a relatively broad range of ebook versions of books by popular Danish authors. This service was changed considerably when several major Danish publishing houses withdrew their titles from the service in the Autumn of 2012 and went on to launch their own service, ebib.dk, from 2013. Both services allow users in municipalities whose public libraries subscribe to the service to read books in a web browser (through a streaming service), rather than allowing them to download copies of the whole ebook. The new ebib.dk service also employs a different, quota-based pricing structure for how libraries pay for user loans.

Due to the active effort by the public libraries, the download of ebooks from libraries has grown significantly in the period 2009-2012: 152,000 downloads in 2009, 187,000 in 2010, 293,000 in 2011 and 1,264,000 in 2012. (Statistics Denmark, 2013). In 2012, 17% of the Danes using the libraries' internet services state they use it for lending or downloading ebooks (Danish Ministry of Culture, 2012). The number of downloads of film and music (combined) was still higher than ebooks in 2012, but download of ebooks displays the most significant growth. While the download of digital materials from libraries has been growing for several years, the lending of physical materials displays a slow and steady decline (Danish Agency of Culture, 2012; Statistics Denmark, 2013). The number of available Danish ebook titles has, however, been restricted compared to the Danish language paper books available for lending. An estimate from September 2011 of the total number of available library books in print counts 447,621 books in Danish and 310,043 print books in foreign languages. In comparison there were only 2,141 available ebooks titles in Danish and 75,050 ebooks in foreign languages (Danish Agency of Culture, 2012, p. 9).

Methodology

The empirical analysis reported below consists of a national, quantitative survey of ebook reading carried out in March 2013. The survey was conducted with a commercial provider, and the sample (N=1205) was drawn from the provider's online panel to be representative of the Danish Internet population, estimated according to the parameters of age, gender, and geographical location. Due to the nature of online panel research, the sample size was decided beforehand, and was chosen at N≈1200, to ensure reasonable levels of statistical uncertainty, also in cross-tabulations.

The statistical universe for the findings reported in this article is the Danish Internet population, which is the proportion of the entire population that has access to, and uses, the Internet. The Internet population currently covers about 92% of Danish households (Statistics Denmark, 2013). For the purposes of the present discussion, the Internet population represents the relevant universe to sample, since ebook use for all practical purposes requires the user to have Internet access; however, comparisons with readers of paper books does not take into account paper book readers with no

internet access. The study was financed by the research program *The Mediatization of Culture, The Challenge of New Media* at University of Copenhagen. It was carried out in cooperation with the research program *Meaning Across Media: Cross-Media Communication and Co-creation* and two companies *Netminers* og *Interfazes*. The Danish survey was part of a larger European survey covering general media use conducted by the EU COST Action program “Transforming audiences, transforming societies.” In order to avoid terminological confusion, we will use the term “ebook” about the digital text to be read on a variety of media platforms (pc, tablets, mobile phones, and so on) and “ebook reader” about the dedicated hardware technologies which are exclusively designed for reading of books (like Amazon’s Kindle, Barnes & Noble’s Nook, and Sony’s Reader).

Basic ebook use patterns

Despite the undecided state of the market for ebooks, our survey shows that ebooks is no longer a non-existing phenomenon in terms of use: When asked if they used an ebook on the day before they completed the survey, about 6% of respondents said yes. It is noteworthy that when measured this way, the proportion of ebook users is about a fifth of the proportion of users of ordinary books, signaling that ebook use can no longer be considered rare or be seen purely as an activity reserved for early adopters (Rogers, 2003).

Table 1

Use of different media for accessing book content

Medium	Share that used this medium the day before
	%
Paper book	32.9% (±2.7%)
Ebook	6.1% (±1.3%)

N=1205, statistical uncertainty calculated at $\alpha=.05$

Preferred platform

A number of different ways of accessing ebooks exists. Dedicated readers, such as for example, Amazon’s Kindle product line, allow

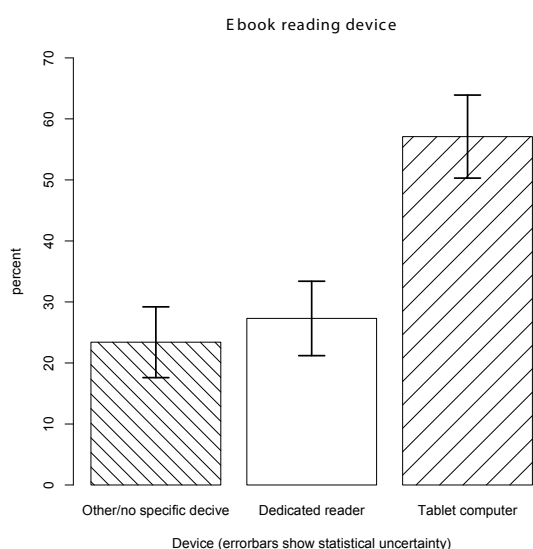
for a reading experience which closely resembles ordinary book reading in a number of important respects. Especially the use of passive screens (“e-Ink”), which are based on the reflection of ambient light for making screen content visible, closely matches the experience of reading ordinary book pages. In 2013, when data for this study was collected, several such dedicated devices were marketed and sold in Denmark. However, the Kindle was not marketed directly by Amazon in Denmark, but rather had to be purchased abroad and delivered by mail from the US or through a few online outlets.

The digital format of the ebook allows readers to access the books using other devices as well. Ebooks can also be distributed on ordinary, general-purpose computers, and not least tablet computers such as, for example, the Apple iPads, and also tables running Google’s operating system for mobile devices, Android, can present ebook content. Although the active, backlit screens of tablets offers a different reading experience from that of dedicated readers, tablets are already widely available in the population, with 19% of households owning a tablet in 2012 (Statistics Denmark, 2012, p. 7), which effectively means that

key elements in the infrastructure necessary for the distribution and use of ebooks is already in place, even before the market for ebooks has gained significant momentum.

The most striking observation from figure 1 is that tablet computers are clearly the dominant platform for reading ebooks. Despite the availability of several, e-Ink-based devices on the market, the various tablet devices represents a combined share of reading devices of about 57%, most likely reflecting the easy access to the device and the relative ease with which titles can be bought from online retailers or downloaded from repositories of free ebooks or ebooks made available online through the public library system. Although the Kindle was not marketed in Denmark at the time of the study, it is noteworthy that of the total 205 ebook users among the respondents, 18% use an Amazon Kindle to

Figure 1
Devices used for reading ebooks



N=205. Percentages of ebook users

read ebook content. Despite not being easily available, it is presumably the close integration of the Kindle with Amazon's on-line delivery system that lies behind its comparatively wide distribution as reading device.

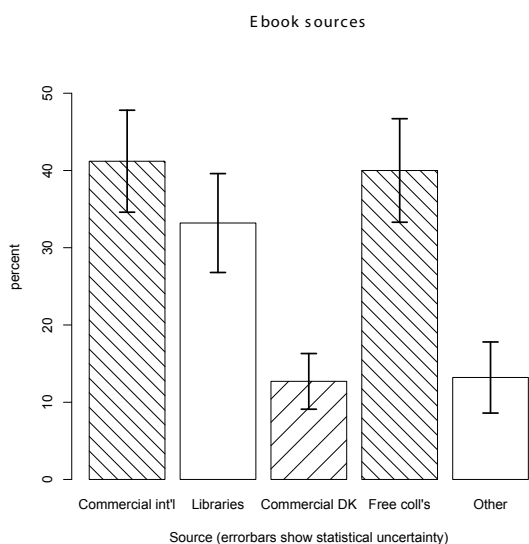
Emerging markets

The availability of ebooks is of obvious importance to the ways in which people begin to use ebooks. At the time of the present study, the market for ebooks was clearly still in its infancy, with a relatively small selection of titles available in Danish, and with no clear market structure yet established. While users' willingness to pay for ebook content remains an open (and hotly debated) issue, the already existing user base has established preferences for gaining access to ebooks.

The trend of figure 2 is quite clear since combining the numbers for libraries and free collections show that three in four ebook users have used publicly available collections as a source for ebook content. This may in part reflect the absence of a coherent, easy-to-use commercial outlet for ebooks in the Danish market. It is also likely to reflect the importance of the public libraries' effort to integrate

the lending of ebooks into the services they offer. The high popularity of publicly available content displayed in figure 2 presumably reflects the consequences of the experiment with the eBookshelf, and indicates the importance of the experiment in instigating ebook use in Denmark. More broadly, the trend can also be seen as an indication of the importance of public libraries to Danish literary culture in a wider sense. The public libraries have for many years been a central source of books to the Danish population, and the high level of knowledge and use of the physical libraries may translate into high levels of awareness and use of the libraries' digital services. The fact that Amazon makes up about half of the 40% of users who have at some point acquired ebooks through an international, commercial outlet serves to underline the emerging nature of the Danish

Figure 2
Primary sources for ebooks



N=205. Percentages of ebook users in the survey

ebook market since Amazon at the time of the study did not carry Danish language ebooks.

The ebook users

As noted above, a non-negligible proportion of the sample (about 6%) had used an ebook the day before. The use of ebooks is obviously more common than that, and our study shows that about 11% of the internet population uses ebooks at least once every month, and 17% have used ebooks at some point. This compares well with the analysis of the Danes' cultural habits in 2012 which found that 8% of all Danes (and not only of the internet population) read ebooks (Danish Ministry of Culture, 2012, p. 95).

Table 2

Use frequency of different book media

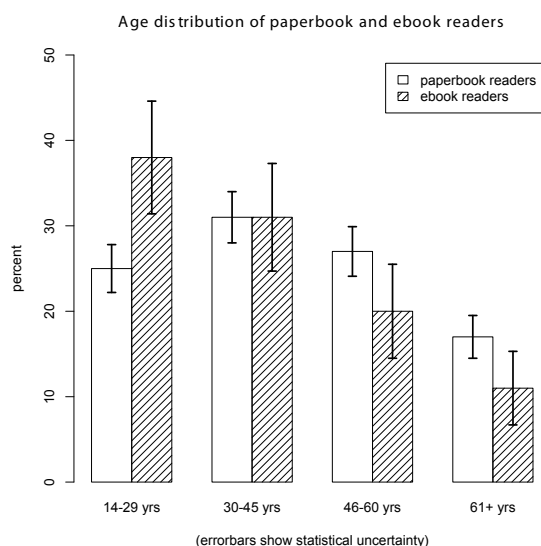
Use frequency	Paper books	Ebooks
At least once per month	56.9% ($\pm 2.8\%$)	10.6% ($\pm 1.7\%$)
At least once per year	74.6% ($\pm 2.5\%$)	17.0% ($\pm 2.1\%$)
Never / less than once per year	25.4% ($\pm 2.5\%$)	83.0% ($\pm 2.1\%$)

N=1205, statistical uncertainty calculated at $\alpha=.05$

Despite the non-negligible levels of ebook use noted above, the ebook is by no means a mainstream phenomenon yet. The level of non-use for ebooks is about 83%, while non-use of ordinary books, as reported by respondents, lies much lower at about 25%.¹ Given the technological difficulties that users commonly have to negotiate in order to access ebooks (downloading apps to their tablet or working out how to access books which are often offered in a variety of ebook file formats), the relative differences between the technically mediated formats and the paper-based book appears realistic.

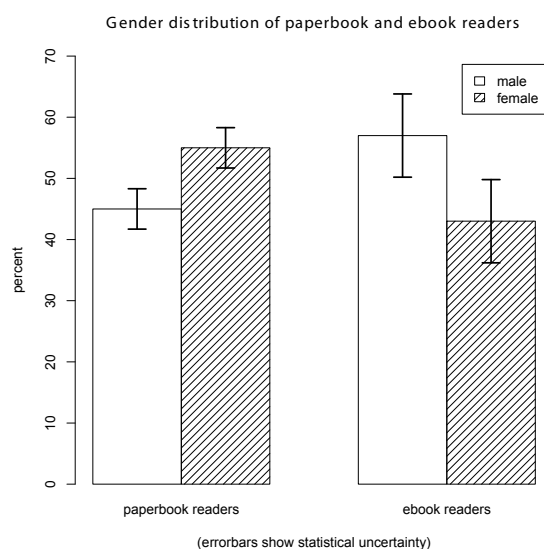
It is also noteworthy that the share of respondents who report to have used ebooks at least once in a year is about 17%. This corresponds closely to the 16% that by definition makes up the combined shares of the 'innovator' and 'early adopter' segments in Roger's diffusion theory (Rogers, 2003), signalling that the ebook might be

Figure 3
Age distribution of paper book readers and ebook readers



N=899 (paper book readers) and N=205 (ebook readers)

Figure 4
Gender distribution of paper book and ebook readers



N=899 (paper book readers) and N=205 (ebook readers)

gaining critical mass, and thus be about to enter a phase of more rapid diffusion to larger segments of the population.

Reading habits

The acceleration of diffusion processes depends to large extent on the social transfer of norms and attitudes from adopters to non-users, so for an innovation to gain critical mass it is not enough that a large number of people have adopted a given innovation, they also need to be the right kind of people. Innovations become accepted into the mainstream when potential users meet people who are already users and through them learn the possible uses of an innovation for their own practices and concerns (Kawakami and Parry, 2013). Figure 3 shows the age distribution of ebook users and respondents who read ordinary books.

While figure 3 shows that ebook readers tend to be younger than people who read ordinary books, a more important observation is that the two age distributions follow the same pattern, suggesting that the two groups are not fundamentally different: The group of ebook reading respondents are not only young and (see figure 4 below) male (as might be expected of early adopters), but rather consists of people from all age groups and of both genders.

Taken together, figure 3 and 4 suggests that although ebook readers tend to be younger and are also more likely to be male, they have a demographic profile that broadly resembles that of paper book readers: although some differences exist,

the overall picture is one of broad similarity, not of difference. From the perspective of innovation diffusion, this suggests that potential ebook users (assumed to be most prevalent among people who already read paper books) are likely to meet or know people similar to themselves who already use ebooks.

The emerging character of the market has so far meant that people sought out ebooks from a variety of sources, both domestic and foreign. Since the market for ebooks is more mature not least in the US, it is relevant to look at the potential changes that the diffusion of ebooks may have on ebook users' preferences for the language of the books they read.

Table 3

Ebook users' reading of books in English

Reading habits	%
Ebooks have made me read more books in English	15.6% (±5.0%)
I never read books in English	17,1% (±5.1%)
Ebooks have not changed my reading of books in English	54,6% (±6.8%)

N=205, statistical uncertainty calculated at $\alpha=.05$

As table 3 shows, a small group of ebook users (between 10 and 20 per cent) report that using ebooks have made them read more books in English, suggesting that although ebooks have not fully penetrated the market yet, the switch from paper based book distribution to digital distribution may hold a potential for shifting readers from Danish to English language reading to a non-negligible extent. If this trend turns out to be robust, it signals that the diffusion of ebooks may have wider consequences for literary landscape as a whole, beyond the immediate challenges to business models that are linked to the technological shift per se.

Conclusion

The reading of ebooks is no longer a negligible phenomenon only to be observed among a tiny segment of technologically savvy us-

ers. It is still limited to a minority of books readers in general, but both the number of people reading ebooks and the currently available infrastructure in terms of a variety of digital reading platforms, online booksellers, and digital libraries suggest that the reading of ebooks will increase noticeably in the coming years. Our analysis indicates that ebook reading is about to reach a “critical mass” which will allow the further diffusion to be sustained not only by external incentives and technologically interested “innovators” but also through the social interaction between “early adopters” of the ebooks and the coming “early majority.” There is no sign of digital books replacing paper books, but the reading of ebooks and print books seems to be mutually supporting activities. An important indicator of a “critical mass” is, in fact, that the interest in ebooks seems to be driven not only by an interest in the technology, but also by a general interest in reading books.

Our analysis confirms that the diffusion of the ebook is also driven by factors outside the traditional stakeholders of the book. The spread of digital media platforms like iPads and other tablets has become more important technologies for the reading of ebooks than the dedicated ebook readers. Thus, the general availability of multi-purpose media technology comes to be an important condition for the future spread of ebooks. Furthermore, Anglo-American media conglomerates like Amazon, Apple, and Google have – among a host of other digital companies – promoted a whole new and global infrastructure for the digital book. National publishing houses and bookstores have so far not played a dominant part in the development of the ebook, having been far more reactive than proactive. One result of this new global infrastructure seems to be that a segment of the reading public comes to be more acquainted with English language books. An important exception to global trends in ebook diffusion is the important role of public libraries for the spread of ebooks in Denmark. As a traditional stakeholder of the book, public libraries seem to have played an important role for the diffusion of the ebook by both developing a national infrastructure for lending ebooks and providing a supply of digital Danish language books.

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Notes

- 1 Some level of social desirability bias may be affecting the self-reported level of non-use of books in a negative direction.