



Accessibility of top 1,000 titles of 2012

Report

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supporting blind and
partially sighted people

This research report contains an analysis undertaken by Claire Creaser of Loughborough University for RNIB in April 2013.

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Foreword

Access to books, whether for work, study or leisure, is essential for participation in society and is something that many of us take for granted. However, for blind and partially sighted people access to books is not a level playing field with their sighted peers. Many books are not available in their preferred formats of unabridged audio, braille or large print and they are therefore excluded from the benefits that reading has to offer.

Access to books is important for blind and partially sighted people and is therefore one of the strategic targets for RNIB in the period from 2009 to 2014:

"Blind and partially sighted people are able to read the 1,000 most popular books each year using commercial downloadable audio books or eBooks."

RNIB commissioned an independent research report from the Library and Information Statistics Unit at Loughborough University (LISU) in 2009 to check what proportion of the most popular books of 2009 were available as an accessible eBook; and in all three formats of physical audio, braille and large print. This provided a baseline by which we could measure progress against our strategic target. We repeated this research for the top 1,000 most popular books of 2010 and 2011 and this new report charts the progress made in 2012 towards our target.

Over the past four years this research has measured the difference that advances in digital publishing have made to the availability of accessible books through mainstream channels. In 2009 no eBook reading device or software programme provided a fully accessible reading experience. By this we mean being able to be read an eBook independently in synthetic audio (via synthetic speech audio), electronic braille (via a connected refreshable braille display) and electronic large print (by increasing the font size on a display screen).

The situation has continually changed, and improved since 2009. In 2012 fully accessible eBooks were available to readers with sight loss via tablet computers, Smartphones and computers from numerous commercial eBook stores. Eighty four per cent of the books in the top 1,000 of 2012 are available as an accessible eBook, rising to 99 per cent for adult fiction titles. Adult non-fiction (77 per cent) and children's titles (43 per cent) show lower levels of meeting our criteria of being fully

accessible, which may in some part be due to the complexity of the layout of these genres of titles when in an eBook format.

The most recent LISU analysis also shows that commercially available unabridged audio books are available for 51 per cent of the top 1,000 books of 2012, made up of unabridged downloadable audio books, CDs and cassettes. The continued growth of the availability of downloadable audio books, rising from 27 per cent in 2009 to 49 per cent in 2012 shows that availability of titles in downloadable audio format also continues to grow.

RNIB recognises that not every print impaired reader is able to utilise the new technologies available and we continue to be involved in providing specialist products and services to those readers who need them. However, we find that more and more blind and partially sighted readers are taking up the new technologies, and we can make a big difference for those readers by working collaboratively with the publishing and related industries on opening up these new digital technologies to blind and partially sighted users. This report recognises the efforts made by the digital publishing industry to make their content available as accessible eBooks and downloadable audio books. We hope these findings will encourage the publishing industry to continue to make more books accessible.

Improving eBook reading devices so they cater better for the needs of blind and partially sighted people is an area of increased focus for RNIB. This report is an open invitation to eBook device, app and service developers to continue to make the eBook experience an accessible one for blind and partially sighted people. By continuing our work together, the target of giving blind and partially sighted readers the same access to the top 1,000 books as sighted people will come ever closer.

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1 Introduction

This is the fourth year in which LISU has carried out research for RNIB into the accessibility of the most popular 1,000 books of the previous year. The results for the most popular books of 2009 and 2010 are presented in the LISU report “Accessibility of top 1,000 titles of 2010”, which can be downloaded from the RNIB website¹. Detailed results for the most popular books of 2011, including comparisons to previous years, are available in the report “Accessibility of top 1,000 titles of 2011”, also available from the RNIB website²

For 2012 RNIB re-focused its strategic goals to concentrate on commercially available accessible eBooks and unabridged audio on CD or available for download. Consequently, print accessibility (via physical large print, giant print and braille) and charitable provision have not been included in the research this year.

The growing eBook market has had a profound impact on the availability of accessible reading material, with more devices becoming accessible to blind and partially sighted readers, at least for those able to read large print. Text-to-speech options are also available on some eBook readers, while apps and computers further increase accessibility, via synthetic speech audio and electronic braille, and this is therefore an area that RNIB also wishes to monitor.

1.1 Methodology

In each year, RNIB provided a spreadsheet listing the titles to be checked, together with suggestions for sources and access to relevant databases. The methodology for selecting the titles is described in detail in the Appendix. In brief, titles were selected based on their popularity in the year, using market research from Book Marketing Limited (BML) and

1 Creaser, C (2011) **Accessibility of top 1,000 titles of 2010**, London, RNIB. Available at http://www.rnib.org.uk/professionals/Documents/2010_RNIB_Top_1000_books_report.pdf

2 Creaser, C (2012) **Accessibility of top 1,000 titles of 2011**, London, RNIB. Available at http://www.rnib.org.uk/professionals/Documents/Accessibility_Top_1000_2011_Research_report.pdf

sales data from Nielsen BookScan. BML research findings on the preferred genres and categories of sighted people aged 65 and over were used as a proxy for the reading preferences of the blind and partially sighted population. These genres formed the basis for the list, which also includes a small percentage (10 per cent) comprising the most popular children's titles.

The numbers of books included in each year, on which the percentages in this report are based, are as follows:

- Adult fiction 450
- Adult non-fiction 450
- Children's 100

Adult fiction has been sub-divided into seven genres, and the number of titles included in each this year is as follows:

- Crime and thriller 200
- General and literary fiction 150
- Historical fiction 25
- Horror 4
- Poetry and plays 6
- Saga and romance 50
- Science fiction and fantasy 15

The methodology for searching is described in detail in the Appendix. Charitable provision, for example titles available as talking books from the RNIB library, was not investigated this year. The aim was to identify one commercially available edition of each title in eBook, downloadable unabridged audio, and unabridged audio on CD (whether standard CD or MP3 format), where available; in practice the format of the databases used, and their search interfaces, were such that multiple editions were often identified. Where this was the case, all editions identified were recorded. However, the researchers did not undertake a comprehensive search for availability in all possible editions for each format of each title;

once one accessible edition had been found no further sources were specifically searched for that format.

The research on the 2009 title list was undertaken during August and September 2010. The research on the 2010 title list was undertaken during June and July 2011. By this time, technological developments in eBook readers and software had led to improved accessibility, with Apple devices using iBooks being regarded as fully accessible, while books for the Kindle e-reader were included as being accessible in electronic large print.

The research on the 2011 title list was undertaken between February and March 2012. Further developments in eBook accessibility meant that titles from two new sources – Kobo and Waterstones – were considered to be accessible in electronic large print. Whether text-to-speech was enabled for each title available for the Kindle was also recorded as a measure for RNIB for advocacy work, but these were not included in the total figures for accessible audio titles, owing to the text-to-speech operating processes not being fully accessible for a blind user.

The research on the 2012 title list was undertaken between February and March 2013. eBooks from the Kobo and Nook stores were considered fully accessible, and eBooks available via the Google Play website were included as being partially accessible – in electronic large print and synthetic speech audio, but not electronic braille.

2 Summary of key results

This year the research focused on commercial provision of eBooks, downloadable unabridged audio books, and unabridged audio books on CD.

2.1 eBooks

- Overall, 84 per cent of the top 1,000 titles of 2012 were available as fully accessible eBooks, compared to 73 per cent in 2011 and 45 per cent in 2010.
- By genre, 99 per cent of the Adult fiction, and 77 per cent of the Adult non-fiction titles included were available as fully accessible eBooks in 2012 (n=450). These figures compare to 93 per cent of Adult fiction and 62 per cent of Adult non-fiction in 2011.
- 43 per cent of Children's titles were available as accessible eBooks in 2012, compared to 30 per cent in 2011 (n=100).

2.2 Downloadable audio books

- Blind and partially sighted readers who prefer to download their audio books could obtain 49 per cent of the top 1,000 titles of 2012 in this way, compared to 42 per cent in 2011.
- 25 per cent of the most popular 450 Adult non-fiction titles were available as unabridged downloadable audio books, compared to 43 per cent of children's titles (n=100), and 75 per cent of Adult fiction titles (n=450) in 2012.
- Availability varied by genre, with 81 per cent of the most popular General and literary fiction titles available to download as unabridged human speech audio books (n=150), compared to 40 per cent of Saga and romance titles (n=50) in 2012.

2.3 Audio books on CD

- There has also been an increase in the proportion of titles blind and partially sighted readers can obtain as unabridged audio CDs. 42 per cent of the top 1,000 titles of 2012 could be purchased in this format, compared to 37 per cent of the top 1,000 titles of 2011.

- Included in this 42 per cent are 12 per cent of the top 1,000 titles which could be bought as MP3 format CDs in 2012, compared to 8 per cent in 2011.
- 18 per cent of Adult non-fiction titles were available as unabridged audio books on CD (n=450), compared to 40 per cent of Children's titles (n=100), and 67 per cent of Adult fiction titles (n=450) in 2012.
- Availability varied by genre, with 74 per cent of the most popular Crime and thriller fiction titles available to download as unabridged human speech audio books (n=200), compared to 34 per cent of the most popular Saga and romance titles (n=50) in 2012.

3 Detailed results - eBooks

3.1 2012 results by source

To qualify as being accessible for blind and partially sighted users of synthetic speech audio and electronic large print, an eBook must be capable of being read in synthetic speech audio or large print without additional access technology and without sighted assistance. To qualify as being accessible for electronic braille users, an eBook must be capable of being output by a blind person as electronic braille with the addition of an electronic braille display, but without sighted assistance.

The eBooks market is developing rapidly, and for the 2012 list, Apple iBooks accessed via Apple devices met all these criteria. eBooks for the Nook and Kobo apps available from their respective online stores on Apple devices also met all three criteria, as did eBooks sold via Waterstones Online store for use on a PC. These are described as fully accessible eBooks in the analysis which follows.

Kindle eBooks, and those sold via the Google Play website met the criteria for large print only in 2012, and are described as partially accessible eBooks in the analysis which follows. Some Kindle titles have the text-to-speech function enabled, which allows them to be read using synthetic speech on a compatible device; the numbers of these were noted, and are reported separately. They are not included in the overall results, as they are not compatible with electronic braille.

Table 3.1 shows the overall findings for eBook availability by source for titles in the 2012 top 1,000 list. Note that the searching procedure was hierarchical – not every source was searched for every title. Once an eBook was identified, that title was excluded from subsequent searching; however Waterstones online was also a source for audio books, and eBook editions were recorded at the same time. The number of titles searched for each source is given in the table.

Overall, blind and partially sighted readers could access 836 (84 per cent) of the top 1,000 titles of 2012 as a fully accessible eBook from one or more of the four sources identified for these.

Blind and partially sighted readers were able to obtain 827 (83 per cent) of the top 1,000 titles of 2012 as partially accessible eBooks, from one other of the two sources identified for these. A total of 821 eBooks (82 per cent of the top 1,000) were available from the Amazon Kindle store; three-quarters of these (624 titles, 76 per cent) had text-to-speech enabled.

There is considerable overlap in the titles available as fully or partially accessible eBooks, with just 11 titles available only as partially accessible eBooks, and two titles available only as fully accessible eBooks. Overall blind and partially sighted readers could access 847 (85 per cent) of the top 1,000 titles of 2012 as either a fully or partially accessible eBook. This means that they could not read 153 titles (15 per cent of the top 1,000) in any electronic format.

Table 3.1 Fully and partially accessible eBooks, by source

Source	Titles Searched	Number Available
Fully accessible		
Apple	1,000	803
Nook	197	21
Kobo	176	10
Waterstones	709	482
Any fully accessible	1,000	836
Partially accessible		
Kindle	1,000	821
of which, TTS enabled		624
Google Play	179	6
Any partially accessible	1,000	827
Any eBook	1,000	847

3.2 2012 results by genre

Table 3.2 shows eBook availability for the three main genres of Adult fiction, Adult non-fiction and Children's books. Table 3.3 provides additional detail for seven broad genres within Adult fiction.

Table 3.2 Accessible eBooks by genre

	Titles included	Fully accessible		Partially accessible	
Adult fiction	450	447	99%	443	98%
Adult non-fiction	450	346	77%	342	76%
Children's	100	43	43%	42	42%
Total	1,000	836	84%	827	83%

Table 3.3 Accessible eBooks – Adult fiction genres

	Titles included	Fully accessible		Partially accessible	
		Count	%	Count	%
Crime and thriller	200	200	100%	200	100%
General and literary fiction	150	150	100%	148	99%
Historical fiction	25	25	100%	25	100%
Horror	4	4	100%	4	100%
Poetry and plays	6	4	67%	3	50%
Saga and romance	50	49	98%	49	98%
Science fiction and fantasy	15	15	100%	14	93%
Total	450	447	99%	443	98%

There were just three of the top 450 Adult fiction books of 2012 – less than 1 per cent – which blind and partially sighted readers could not obtain as fully accessible eBooks. Within the Adult fiction genres, two books of Poetry and one title from Saga and romance were not available

as an eBook, so could not therefore be found available to blind and partially sighted readers as an accessible eBook. Blind and partially sighted readers who prefer Adult non-fiction were less well served, but were able to obtain 346 of the top 450 titles (77 per cent) as fully accessible eBooks. Children have the least choice, with less than half of their most popular titles of 2012 (43 out of 100, 43 per cent) available as fully accessible eBooks.

The position with regard to partially accessible eBooks is similar, although slightly fewer titles are available to readers using a Kindle device or purchasing from Google Play. Blind and partially sighted readers can obtain 443 of the top 450 Adult fiction titles (98 per cent) as partially accessible eBooks. In Adult non-fiction, blind and partially sighted readers can obtain 342 out of the top 450 titles (76 per cent) as partially accessible eBooks, while 42 out of the top 100 Children's titles (42 per cent) are available in this format.

3.2.1 Text-to-speech

EBooks have the capability to be read using synthetic speech audio, but not all devices that are used to access the eBook are deemed by RNIB to be fully accessible, as they cannot be utilised independently. All 1,000 of the top titles were checked on the Amazon Kindle book store to see if text-to-speech was enabled. Overall, of the top 1 000 titles, 821 (82 per cent) were available on the Kindle book store, and of these, 624 (76 per cent) had text-to-speech enabled. These figures compare to 754 titles (75 per cent) available on the Kindle book store in 2011, of which 710 (94 per cent) had text-to-speech enabled.

Table 3.4 shows the overall availability of text-to-speech enabled editions for the main genres. In 2012, blind and partially sighted synthetic speech users could access 435 out of the top 450 Adult fiction titles (97 per cent), 307 out of the top 450 Adult non-fiction titles (68 per cent), and 34 out of the top 100 Children's titles (34 per cent) using text-to-speech on a Kindle ereader, or other compatible device.

Table 3.4 Availability of text-to-speech enabled editions

Genre	Total titles	Available 2012	
		Count	%
Total Adult fiction	450	338	75%
Adult non-fiction	450	266	59%
Children's	100	20	20%
All	1,000	624	62%

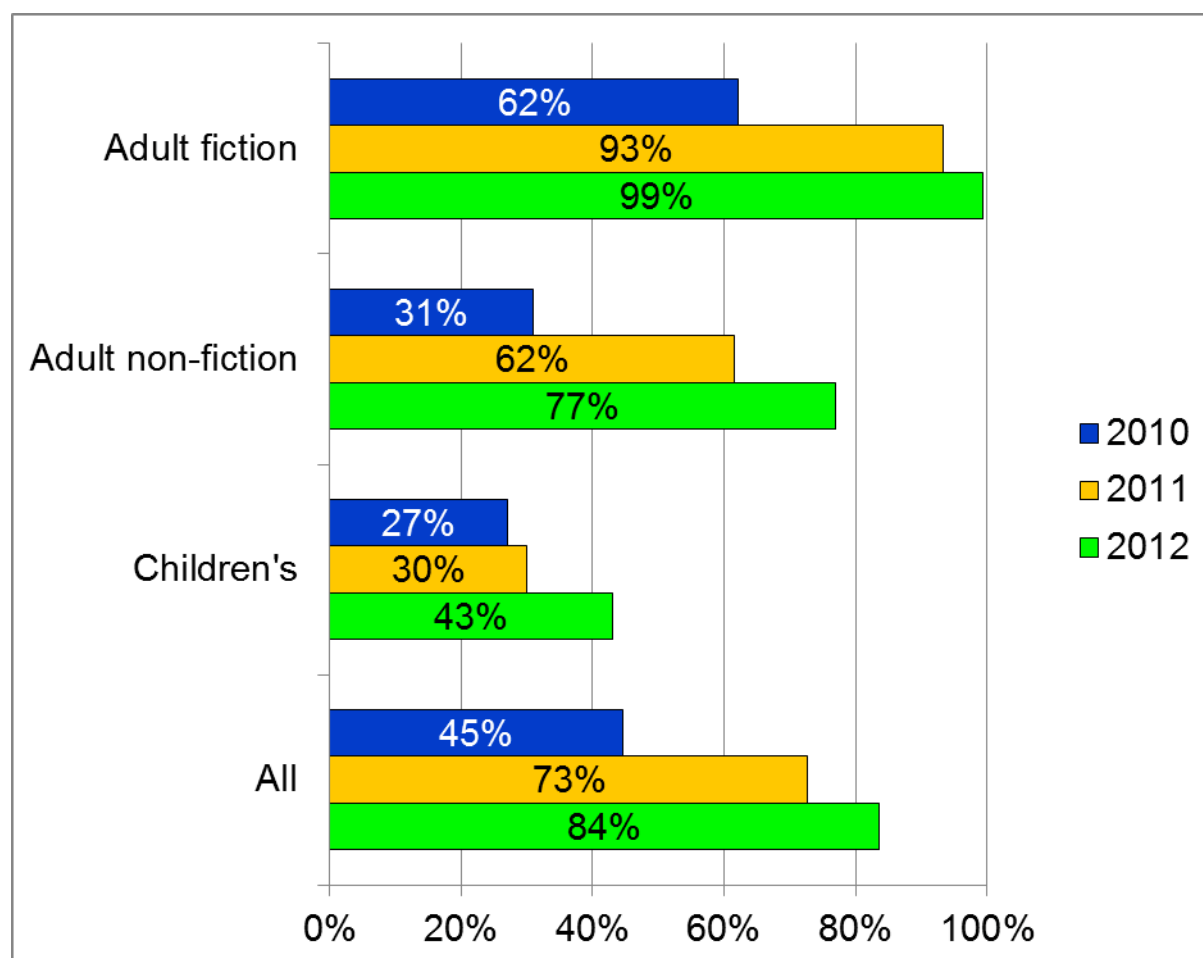
3.3 Comparison to previous years

Table 3.5 shows that there has been an increase in the availability of the 1,000 most popular titles of each year as fully accessible eBooks, from 446 (45 per cent) in 2010 and 727 (73 per cent) in 2011 to 836 (84 per cent) in 2012. The trends for the three main genres are illustrated in Figure 3.1.

Table 3.5 Trends in availability of fully accessible eBook editions

Genre	Total titles	2012		2011		2010	
		Count	%	Count	%	Count	%
Adult fiction	450	447	99%	420	93%	280	62%
Adult non-fiction	450	346	77%	277	62%	139	31%
Children's	100	43	43%	30	30%	27	27%
All	1,000	836	84%	727	73%	446	45%

Figure 3.1 Trends in availability of fully accessible eBook editions



Within the Adult fiction genres, Table 3.6 shows that readers of five of the seven genres could obtain all the most popular titles of 2012 in the genre as fully accessible eBooks. In 2011, only two genres had all their most popular titles available as fully accessible eBooks, with none in 2010. Poetry and plays remain relatively poorly served by fully accessible eBooks, despite a doubling in the availability of accessible editions in 2012, to 67 per cent (4 out of 6 titles). Note that these two titles were not available in any eBook format, so could not be accessible as eBooks. This compares to 13 per cent fully accessible in 2010 (n=8). Saga and romance remains the only other genre for which blind and partially sighted readers could not obtain copies of all the most popular titles of 2012 as fully accessible eBooks, although availability has increased from 65 per cent in 2010 (42 out of 65 titles included that year) to 98 per cent (49 out of 50 titles) in 2012, with the one “missing” title not being available as an eBook at all.

Table 3.6 Trends in fully accessible eBook editions – Adult fiction genres

Genre	Total titles	2012		2011		2010
		Count	%	Count	%	%
Crime and thriller	200	200	100%	193	97%	64%
General and literary fiction	150	150	100%	143	95%	59%
Historical fiction	25	25	100%	25	100%	67%
Horror	4	4	100%	4	100%	50%
Poetry and plays	6	4	67%	2	33%	13%
Saga and romance	50	49	98%	39	78%	65%
Science fiction and fantasy	15	15	100%	14	93%	90%
All	450	447	99%	727	73%	62%

Table 3.7 shows the trends in availability of partially accessible eBooks for the three main genres of Adult fiction, Adult non-fiction and Children’s books. As with fully accessible eBooks, there has been an increase in the proportions of titles which blind and partially sighted readers can access as partially accessible eBooks in all three genres. Interestingly, in 2010 and 2011, there were more titles available as partially accessible than as fully accessible eBooks in all three genres; this year the position is reversed, with blind and partially sighted readers now able to access more titles as fully accessible eBooks than as partially accessible eBooks.

Table 3.7 Trends in partially accessible eBook editions

Genre	Total titles	2012		2011		2010	
		Count	%	Count	%	Count	%
Adult fiction	450	443	98%	436	97%	415	92%
Adult non-fiction	450	342	76%	317	70%	260	58%
Children's	100	42	42%	36	36%	34	34%
All	1,000	827	83%	789	79%	709	71%

Table 3.8 Trends in partially accessible eBook editions – Adult fiction genres

Genre	Titles 2012	2012		2011		2010
		Count	%	Count	%	%
Crime and thriller	200	200	100%	196	98%	94%
General and literary fiction	150	148	99%	148	99%	95%
Historical fiction	25	25	100%	25	100%	87%
Horror	4	4	100%	4	100%	100%
Poetry and plays	6	3	50%	3	50%	25%
Saga and romance	50	49	98%	45	90%	91%
Science fiction and fantasy	15	14	93%	15	100%	100%
All	450	443	98%	789	79%	92%

Within the Adult fiction genres, Table 3.8 shows a more mixed picture in the availability of partially accessible eBooks, compared to that for fully accessible eBooks. Blind and partially sighted readers could access all of the top 200 Crime and thriller titles as partially accessible eBooks in 2012, compared to 98 per cent (196 out of 200) in 2011, and 94 per cent (188 out of 200) in 2010. Fans of General and literary fiction were able to access 95 per cent (128) of the top 135 titles of 2010, increasing to

99 per cent (148) of the top 150 titles of 2011, but this figure has remained unchanged in 2012. Readers of Saga and romance saw availability fall slightly in 2011, from 91 per cent (59 out of 65 titles) in 2010 to 90 per cent (45 out of 50 titles). However, in 2012 this has been reversed, with 98 per cent (49) of the top 50 titles being available as partially accessible eBooks. In the smaller genres, there has been no change in 2012 for Historical fiction, Poetry and plays, and Horror, although one Science fiction and fantasy title was not available as a partially accessible eBook, whereas all had been accessible in this format in the previous two years.

4 Detailed results – human speech audio

The focus of investigations into human speech audio editions of the most popular 1,000 books of 2012 was on commercially available downloadable digital editions and CDs. In the course of the research, both MP3 and traditional format CDs were identified, and recorded separately; however it was not always clear whether a CD was in MP3 or traditional format. In such cases, the title was recorded as a traditional CD; the figures may therefore underestimate the numbers of MP3 CDs available. Several audio cassette recordings were also identified; however, as a comprehensive search was not undertaken for these editions, no detailed analysis of the findings has been included in this report. Pre-loaded digital players were available for 19 titles, via Amazon, and have not been included here.

It was not always clear whether or not recordings were unabridged, even when the number of discs or playing time was given. If there was any doubt, the title was not considered “available” from this source. There were 17 instances this year where it was not clear whether a recording was unabridged; however only four of the titles could not be obtained unabridged from an alternative source or in an alternative human speech audio edition.

4.1 2012 results, by source and format

Table 4.1 gives the detailed results for availability of human speech unabridged audio editions of the top 1,000 books of 2012 by source and format. Overall, blind and partially sighted readers could obtain 493 titles (49 per cent of the top 1,000) as downloadable audio books; and 423 titles (42 per cent of the top 1,000) on CD.

Table 4.1 Unabridged human speech audio, by source

Source	Titles Searched	Number Available
Download		
Audible (Amazon)	1,000	472
Apple	1,000	452
AudioGo	528	3
Waterstones	709	27
Any download	1,000	493
CD		
Amazon	1,000	305
AudioGo	528	5
Waterstones	709	27
ISIS	664	81
Any CD	1,000	417
MP3 CD		
Amazon	1,000	49
ISIS	589	75
Any MP3 CD	1,000	122
Any CD format	1,000	423
Cassette		
Amazon	1,000	7
Waterstones	709	71
ISIS	664	81
Any cassette	1,000	107
Any physical format	1,000	431
Any Audio format	1,000	511

4.2 Downloadable audio books

In total, blind and partially sighted readers could access 493 of the top 1,000 titles of 2012 as unabridged downloadable audio books.

4.2.1 2012 results by genre

Table 4.2 shows downloadable audio book availability for the three main genres of Adult fiction, Adult non-fiction and Children's books. Table 4.3 provides additional detail for seven broad genres within adult fiction.

Table 4.2 Downloadable audio books by genre

	Titles included	Downloadable audio book available	
		Count	%
Adult fiction	450	337	75%
Adult non-fiction	450	113	25%
Children's	100	43	43%
Total	1,000	493	49%

Table 4.3 Downloadable audio books – Adult fiction genres

	Titles included	Downloadable audio book available	
		Count	%
Crime and thriller	200	156	78%
General and literary fiction	150	122	81%
Historical fiction	25	20	80%
Horror	4	4	100%
Poetry and plays	6	1	17%
Saga and romance	50	20	40%
Science fiction and fantasy	15	14	93%
Total	450	337	75%

Blind and partially sighted readers could obtain three quarters of the top 450 Adult fiction titles of 2012 as downloadable audio books (337 titles, 75 per cent). Within the Adult fiction genres, readers who prefer Poetry and plays were least well served by this format, with only one accessible title from the top six available, whilst those who enjoy Saga and romance also have a relatively restricted choice, with just 20 out of 50 titles available as a downloadable audio book (40 per cent). This pattern is similar to that found for eBooks.

Blind and partially sighted readers who prefer Adult non-fiction were also poorly served, only able to obtain 113 of the top 450 titles (25 per cent) as downloadable audio books. In this format, Children have more choice than adults wishing to read non-fiction, although still less than half of their most popular titles of 2012 (43 out of 100, 43 per cent) were available as downloadable audio books.

4.2.2 Comparison to previous years

Previous reports in this series have not distinguished downloadable audio books from physical formats of human voice unabridged audio books. For the top 1,000 titles of 2010, a comprehensive search for downloadable audio books was not undertaken, and some 280 titles were not researched for this format, having been identified as available either in a physical human voice edition, or as an accessible eBook. Figures for 2010 are therefore not comparable with those for other years, and are not included here.

Table 4.4 shows that there has been an increase in the availability of the 1,000 most popular titles of each year as downloadable audio books, from 266 (27 per cent) in 2009 to 415 (42 per cent) in 2011 and again to 493 (49 per cent) in 2012. The trends for the three main genres are illustrated in Figure 4.1.

Table 4.4 Trends in availability of downloadable audio books

Genre	Total titles	2012		2011		2009	
		Count	%	Count	%	Count	%
Adult fiction	450	337	75%	284	63%	203	45%
Adult non-fiction	450	113	25%	93	21%	40	9%
Children's	100	43	43%	38	38%	23	23%
All	1,000	493	49%	415	42%	266	27%

Figure 4.1 Trends in availability of downloadable audio books

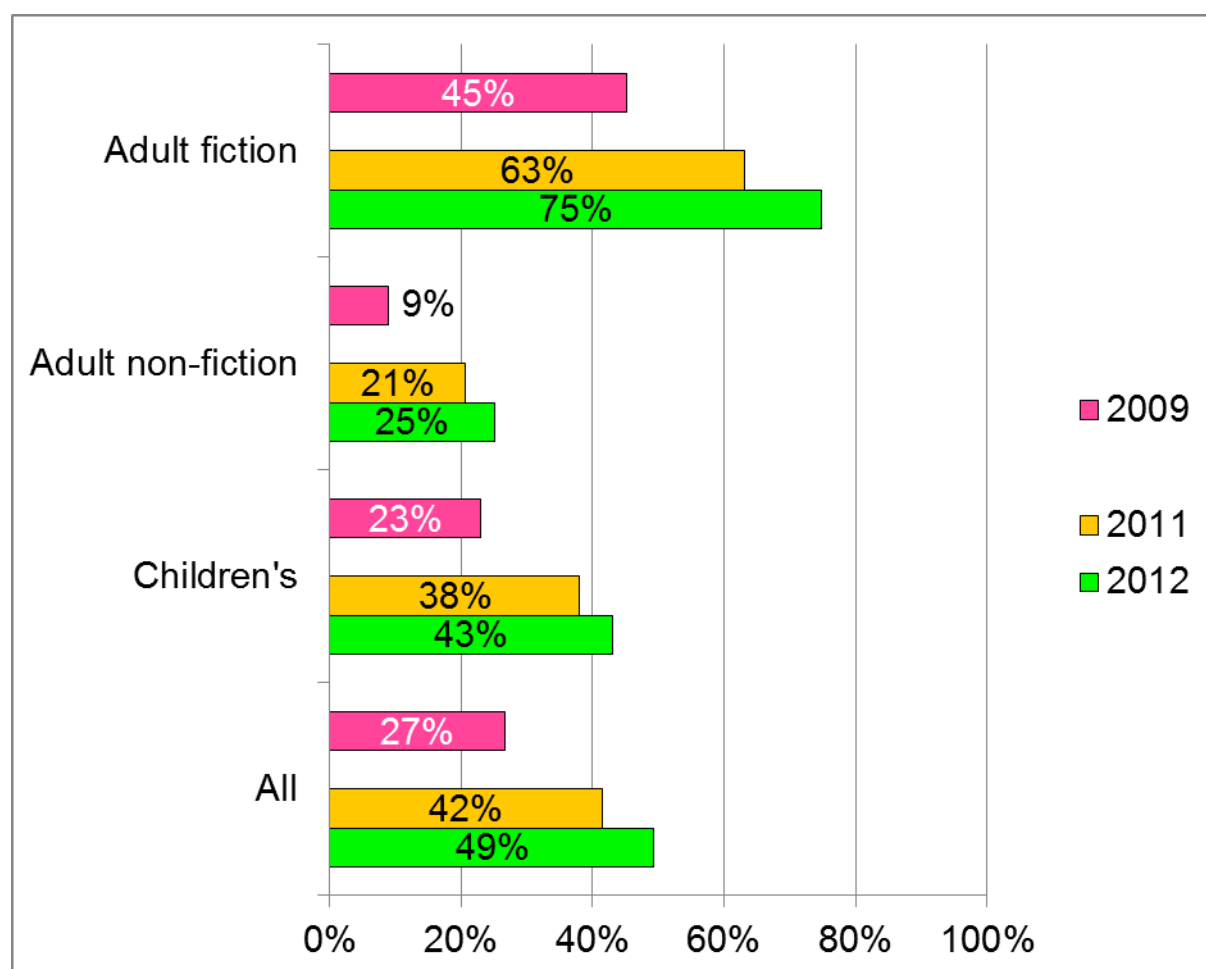


Table 4.5 shows the detailed results for the Adult fiction genres. In the two largest genres – Crime and thriller, and General and literary fiction, – there were significant increases between 2009 and 2011, with further increases in 2012, in the proportions of titles which blind and partially

sighted readers could download. This was also the pattern for Historical fiction (25 titles). In the other genres, the pattern is more variable, but all show improved or equal availability as downloadable audio books for the top titles of 2012 compared to 2009.

Table 4.5 Trends in availability of downloadable audio books – Adult fiction genres

Genre	Titles 2012	2012		2011		2009
		Count	%	Count	%	%
Crime and thriller	200	156	78%	140	70%	42%
General and literary fiction	150	122	81%	100	67%	58%
Historical fiction	25	20	80%	19	76%	40%
Horror	4	4	100%	3	75%	100%
Poetry and plays	6	1	17%	1	17%	38%
Saga and romance	50	20	40%	6	12%	25%
Science fiction and fantasy	15	14	93%	15	100%	90%
All	450	337	75%	284	63%	18%

4.3 Audio books on CD

In this section, traditional and MP3 CD formats are considered together. Note that only commercial sources of recordings were included in the data collection exercise for 2012.

In total, blind and partially sighted readers could access 423 of the top 1,000 titles of 2012 as commercially available unabridged audio books on CD – slightly fewer than they could obtain as downloadable audio books.

4.3.1 2012 results by genre

Table 4.6 shows unabridged audio book availability on CD for the three main genres of Adult fiction, Adult non-fiction and Children’s books. Table 4.7 provides additional detail for seven broad genres within Adult fiction.

Table 4.6 Audio books on CD by genre

	Titles included	CD available Count	%
Adult fiction	450	303	67%
Adult non-fiction	450	80	18%
Children's	100	40	40%
Total	1,000	423	42%

Table 4.7 Audio books on CD – Adult fiction genres

	Titles included	CD available Count	%
Crime and thriller	200	148	74%
General and literary fiction	150	107	71%
Historical fiction	25	15	60%
Horror	4	4	100%
Poetry and plays	6	1	17%
Saga and romance	50	17	34%
Science fiction and fantasy	15	11	73%
Total	450	303	67%

Blind and partially sighted readers could obtain two-thirds of the top 450 Adult fiction titles of 2012 as unabridged audio books on CD (303 titles, 67 per cent). Within the Adult fiction genres, readers who prefer Poetry and plays were least well served by this format, with only one accessible title from the top six available, whilst those who enjoy Saga and romance also have a relatively restricted choice, with just one third (17, 34 per cent) of the top 50 titles available on CD. This pattern is similar to that found for downloadable audio books and eBooks.

Blind and partially sighted readers who prefer Adult non-fiction were again poorly served by the CD format, only able to obtain 80 of the top 450 titles of 2012 (18 per cent) as unabridged audio books on CD. In this

format, children again have more choice than adult non-fiction readers, although still less than half of their most popular titles of 2012 (40 out of 100, 40 per cent) are available as unabridged audio books on CD.

4.2.2 Comparison to previous years

Previous reports in this series have not distinguished CDs from cassettes or downloadable editions of human voice unabridged audio books. Further, 2012 is the first year in which commercial CDs have been a specific target for the research. In previous years, once any accessible audio format had been identified, further sources were not searched for that title, so that data reported below for the top 1,000 titles of 2009, 2010 and 2011 may under-estimate the true availability of CD formats commercially. It is not possible to put a figure on the potential extent of the under-estimation, so the figures in this section must be interpreted with caution.

Table 4.8 shows that there has been an increase in the availability of the 1,000 most popular titles of each year as unabridged human voice audio books commercially on CD, from 274 (27 per cent) in 2009 to 423 (42 per cent) in 2012. Note that part of the increase in 2012 maybe as a result of more comprehensive searching for CD formats this year. The trends for the three main genres are illustrated in Figure 4.2. Table 4.5 shows the detailed results for the Adult fiction genres.

Table 4.8 Trends in unabridged audio books on CD

Genre	Total titles	2012		2011		2010		2009	
		Count	%	Count	%	Count	%	Count	%
Adult fiction	450	303	67%	263	58%	199	44%	201	45%
Adult non-fiction	450	80	18%	67	15%	51	11%	52	12%
Children's	100	40	40%	35	35%	22	22%	21	21%
All	1,000	423	42%	365	37%	272	27%	274	27%

Figure 4.2 Trends in availability of unabridged audio books on CD

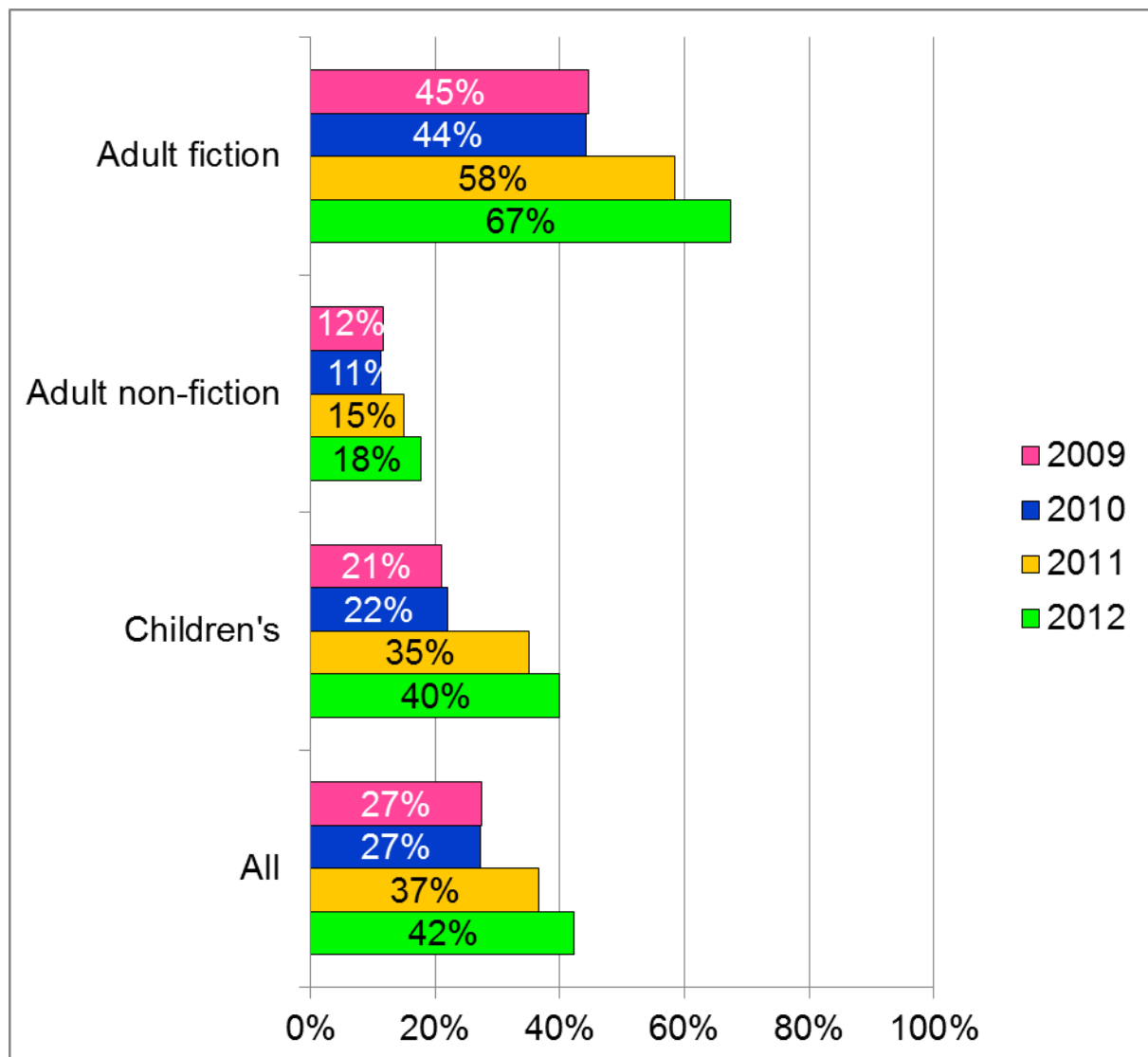


Table 4.9 Trends in audio books on CD – Adult fiction genres

Genre	Titles 2012	2012		2011		2010	2009
		Count	%	Count	%	%	%
Crime and thriller	200	148	74%	126	63%	46%	42%
General and literary fiction	150	107	71%	100	67%	49%	48%
Historical fiction	25	15	60%	12	48%	47%	53%
Horror	4	4	100%	2	50%	0%	100%
Poetry and plays	6	1	17%	0	0%	0%	25%
Saga and romance	50	17	34%	17	34%	29%	35%
Science fiction and fantasy	15	11	73%	6	40%	90%	90%
All	450	303	67%	263	58%	44%	45%

Appendix: Methodology

This is the fourth year for which LISU has investigated the accessibility of the top 1,000 titles in the UK for RNIB. The methodology used for previous years' research is detailed in the individual reports^{3,4}. This appendix describes the methodology used for the research into the 2012 title list.

Title selection

RNIB supplied the list of 1,000 titles to be included in the research. The titles were selected by RNIB based on their popularity in 2012, using market research from Book Marketing Limited (BML) and sales data from Nielsen BookScan.

The preferred genres and categories of sighted people aged 65 and over, as supplied by BML, were used as a proxy for the reading preferences of the blind and partially sighted population because the majority of blind and partially sighted people are known to be over the age of 65⁵. This selection of titles dictated which genres to include in the top 1,000 list, as well as the amount of titles to be included from each genre. In 2011, the balance between adult fiction genres was adjusted to accommodate changing reading preferences. The list also includes a percentage (10 per cent) comprising the most popular children's titles to

3 Creaser, C. (2011) Accessibility of top 1,000 titles of 2010, London, RNIB. Available at http://www.rnib.org.uk/professionals/Documents/2010_RNIB_Top_1000_books_report.pdf

4 Creaser, C (2012) Accessibility of top 1,000 titles of 2011, London, RNIB. Available at http://www.rnib.org.uk/professionals/Documents/Accessibility_Top_1000_2011_Research_report.pdf

5 Access Economics (2009) **Future Sight Loss UK 1: Economic Impact of Partial Sight and Blindness in the UK adult population**, London: RNIB. Available at <http://www.rnib.org.uk/aboutus/Research/reports/prevention/Pages/fsluk1.aspx>

ensure that the needs of younger age groups of blind and partially sighted people were included.

The top 1,000 list was composed as follows: Adult non-fiction, 450 titles; Children's, 100 titles; Crime and thriller, 200 titles; General and literary fiction, 150 titles; Historical fiction, 25 titles; Horror, 5 titles; Poetry and plays, 6 titles; Saga and romance, 50 titles; and Science fiction and fantasy, 15 titles.

The most popular titles in each of these categories, according to Nielsen BookScan, were selected and added to the list. If multiple editions of the same title were found, they were counted as one and the next most popular title was included. Information provided to LISU included author, publisher and imprint, volume sold and genre.

It was decided to compile the top 1,000 list in this way, rather than using a more general list of the 1,000 bestselling titles based on the Total Consumer Market, because:

- The tailored list includes a wide variety and range of genres.
- In comparison, the standard best seller list focuses all age groups in the UK and therefore favours General and Literary fiction and Children's titles to the detriment of Adult non-fiction and fiction genres such as Saga and romance, and Science fiction and fantasy, for example.

Searching

Table A1 details the databases which were used at each stage of the research, and the formats and titles researched in each. The databases used and order of searching was agreed with RNIB at the start of the research. All searching was conducted manually, using the search engines of the various databases in Table A1. The aim was to identify one edition of each title in each of the following commercially available formats:

- fully accessible eBook
- eBook accessible in large print and audio

- unabridged downloadable audio book
- unabridged CD

In practice, the format of the databases used and their search interfaces was such that multiple editions were often identified. Where this was the case, all editions identified were recorded. However, the researchers did not undertake a comprehensive search for all possible editions for each format of each title; once one had been found no further sources were searched for that format.

Table A1 Databases used

Source	Edition(s)	Notes
Apple iBook store	Fully accessible eBook	All titles
Nook online store	Fully accessible eBook	197 titles not found in Apple
WH Smith Kobo store	Fully accessible eBook	177 titles not found in Apple or Nook
Amazon/ Audible.co.uk	Partially accessible eBook Audio download Audio CD	All titles
Google Play	Partially accessible eBook Audio download Audio CD	179 titles not found as eBook in Amazon
AudioGo.com	Audio download Audio CD	529 Titles not found as audio download in Audible/Amazon
Waterstones online	Fully accessible eBook Audio CD Audio download	748 titles not previously found in all three formats
ISIS	Audio CD Audio download	664 titles not previously found in both formats

Unabridged audio cassettes were recorded where found, although this format was not specifically targeted. Availability of hard copy large print and braille editions was not recorded this year.

Notes on the analysis

All editions identified were recorded initially in a spreadsheet, and the data aggregated by format. The analysis was carried out using the SPSS® statistical package.

Issues that arose during the research and how they were resolved by the researchers

The following issues were identified:

Unabridged audio

It was sometimes unclear from the sources used whether titles in audio formats were unabridged. In some cases it seemed likely that human speech audio versions were unabridged, owing to information provided on the cost, number of discs, or playing time. In others, it seemed unlikely, for similar reasons. Details were recorded where there was doubt, and a conservative view taken. We did not assume a title was unabridged unless this was clearly stated in the item description or visible on the cover. It is possible, therefore, that the availability of unabridged audio formats may be under-recorded.

Pre-owned editions

Amazon.co.uk sells “used” as well as new items. For the purposes of this research, only accessible editions which were available to purchase new were included. Where the only accessible editions available were “used”, this was noted.

For further information email publisheradvice@rnib.org.uk
or call RNIB's Media and Culture team on **020 7388 1266**.

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