



Marginalia in the digital age: Are digital reading devices meeting the needs of today's readers?



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ABSTRACT

For centuries, readers have added marginal commentary to books for a variety of personal and public purposes. Historians have mined the marginalia of important historical figures to observe their sometimes raw, immediate responses to texts. Now, reading and annotation practices are changing with the migration of content to electronic books. A survey of reader attitudes and behavior related to marginalia for print and electronic books reveals that the majority of readers write in their books and want e-readers to support this feature. However, many readers report that annotating electronic books is too difficult, time-consuming, or awkward with current technology. In addition, the way readers annotate books depends on whether they are reading for pleasure or for work or education. These findings can guide the development of future devices to better satisfy reader needs.

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1. Introduction

“Among all the gifts of the electronic age, one of the most paradoxical might be to illuminate something we are beginning to trade away: the particular history, visible and invisible, that can be passed down through the vessel of an old book, inscribed by the hands and the minds of readers who are gone” (Katz, 2012).

For centuries, readers have inscribed books with handwritten marginal notes, or marginalia. These annotations can serve as ownership indicators, inscriptions, study notes, summaries, or they can facilitate what has been described as social reading (Jackson, 2001) in which two or more readers discuss the book's contents in a margin-based conversation. Samuel Taylor Coleridge coined the term marginalia to encompass all such annotations (Jackson, 2001), but the practice is as old as the printed book and even older: marginalia have been found in scrolls painstakingly copied down by medieval monks (Drogin, 1983). Marginalia can serve as an aid to memory, a form of communication, a means of reflection, and a unique glimpse into the past. Scholars have studied the marginalia of famous figures such as John Adams (Jackson, 2010), Samuel Clemens (Gribben, 1978), and Adolf Hitler (Ryback, 2008) to better understand their thoughts and opinions.

The advent of e-books and e-readers is changing how we read and the kinds of interactions that we have with written material. New

technologies and reading platforms are enabling readers to engage and interact with a much larger number of other readers in new and transformative ways (Fuller & Rehberg Sedo, 2014; Hartley, 2001; Long, 2003; Marshall, 2005; Rehberg Sedo, 2003, 2009; Swann & Allington, 2009). Contemporary readers are now actively participating in online reading and reviewing platforms, sharing book and author recommendations online, and connecting to other readers, and authors, through social reading platforms and social media (Fuller & Rehberg Sedo, 2014). Social reading, through e-readers, apps, or websites, allows readers to write, save, share, and email comments and to read alongside friends and fellow readers (Braun, 2011; Cerdón-García, Alonso-Arévalo, Gómez-Díaz, & Linder, 2013). However, while all printed books provide the ability for the reader to add marginalia, not all e-readers do. Marshall (2005) suggested that the materiality of paper supports the interactive nature of marginalia.

2. Problem statement

While the physical format of a paper book has been fixed for centuries, new digital reading devices are in development and new formats and features are being explored. A feature such as text annotations or marginalia will only be available if it is explicitly incorporated into the device design. That effort is justified only if designers perceive sufficient demand or interest from modern readers. Anecdotal examples of digital marginalia abound, but there has never yet been a systematic assessment of the prevalence of the practice and how important it is to readers. Such an assessment is necessary for the ongoing and future development of digital reading devices to adhere to reader needs.

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The purpose of this study was to determine the importance of marginalia to readers and therefore the importance of providing this capability in future reading devices. The research questions were:

- RQ1. How important to readers is the ability to annotate books?
- RQ2. Do reader attitudes and habits towards marginalia differ for print and electronic editions?
- RQ3. Do current digital reading devices offer sufficient support for marginalia?

3. Literature review

Many scholars have studied print marginalia extensively. The most authoritative study of the subject is that by Jackson (2001), who described the incidence of and motives behind a cornucopia of historical marginalia and illustrated her points with examples selected from 2000 annotated books. Many papers and books analyzing the marginalia of individual famous historical figures have been written (e.g., Gribben, 1978; Jackson, 2010; Ryback, 2008). Marginalia provide a uniquely intimate glimpse into the reader's mind in the process of reacting to a text. "Turning the pages of the books that [John] Adams marked, we feel that we are reading over his shoulder, sharing an experience with him" (Jackson, 2010, p. 15). Marginalia has captured the interest of readers over the years, and now the evolution of digital technologies means that marginalia, particularly digitized collections and exhibitions, can now be shared more widely (Grafton, 2015). For example, the Oxford Marginalia Group, a website dedicated to showcasing a range of marginalia found in Oxford University's libraries, has nearly 6000 members in its Facebook group, while #MarginaliaMonday is a popular hashtag on social media, particularly Twitter.

3.1. Motives for marginalia

Historically, why have people written in their books? Jackson stated that "ownership marks are far and away the commonest form of annotation" (2001, p. 19), although she provided no quantitative data to support this claim. Some owners have added anathemas, or "book curses," to warn others not to damage or steal their books (Drogin, 1983).

Second, there is a long-recognized pedagogical benefit for students, or anyone seeking to learn from a text, that derives from marking or commenting while reading. Porter-O'Donnell (2004) noted that student readers use marginalia to "make predictions, ask questions, state opinions, analyze author's craft, make connections, and reflect on the content or their reading process" (p. 82).

Third, there are several motives that arise from social or emotional concerns. Readers in the 19th and early 20th centuries commonly filled a favorite book with marginal comments before gifting it to a friend because "reading was more often than not a social activity" (Jackson, 2001, p. 65, italics in original). Sometimes the recipient would augment the book with additional comments and then return it to the original owner. Similar behaviors are beginning to emerge with e-books, as discussed below.

The number of people who own e-readers and tablets has risen in the last few years, which suggests that e-reading continues to grow (Zickhur & Rainie, 2014b). Rainie and Duggan (2012) found that 19% of Americans over the age of 18 owned an e-book reading device, and 25% owned a tablet computer. The subsequent 2013 study found that these numbers had increased to 32% and 42% (Zickhur & Rainie, 2014b). In 2013, e-books accounted for 27% of all adult consumer book sales in the US and 25% of consumer book sales in the UK (Campbell, 2014a, 2014b).

In electronic works, reader modifications are generally referred to as annotations rather than marginalia because there is no margin in which to write. Annotation features for e-books are not standardized, but they commonly include the ability to highlight text, insert bookmarks, and add location-specific comments. Electronic annotations, unlike print

marginalia, can be automatically time-stamped, easily searched, aggregated, filtered, copied, pasted, and shared (Wolfe, 2002). They can even be used as input for automated meta-data extraction such as keyword and abstract generation. Such additional functionalities "further transcend the possibilities offered by paper" (Marshall, 2005, p. 140).

The visual format of these annotations is still in flux. Schilit, Golovchinsky, and Price (1998) designed and implemented XLibris: The Active Reading Machine, a digital notebook that organizes and retrieves information based on the reader's free form writing, digital ink, annotations (p. 2). Pearson, Buchanan, Thimbleby, and Jones (2012) developed the Digital Reading Desk that allows users to add post-its to PDF files by dragging them from an inexhaustible virtual stack. Pearson et al. found that readers were three times as likely to use these virtual post-its as they were to use annotations in a traditional PDF viewer. Liesaputra and Witten (2012) created the Realistic Books software that employs features of physical books such as animated page turning, visual location cues, bookmarks, and annotations to improve the user experience. In a user study, they found that "many users preferred Realistic Books over physical ones because they could move, edit and search the annotations" but that "40% preferred physical books because they are more familiar and feel more comfortable—particularly with regard to the fluidity of scribbling" (p. 606).

3.2. Reader attitudes

Attitudes towards the practice of annotating books range from the very negative to the very positive. Librarians tend to frown on the practice, and this attitude persists for e-books: Sheppard (2009), a library director, recommended fining patrons for annotating e-books or training them to remove the annotations before the text is returned. E-annotations are viewed somewhat more positively in academic libraries. Jantz (2001) assumed that student annotations of textbooks and other course materials are essential for learning. He praised e-books for their support of "damage-free annotation" (p. 107).

Jackson observed that "in Western society today there is a strong prejudice against writing in books," but "we make an exception for notes written by famous people" (2010, p. 59). Adler advocated the practice of marginalia for its benefits to the annotator, regardless of fame, and dismissed those who argue for the maintenance of pristine pages. "Confusion about what it means to 'own' a book leads people to a false reverence for paper, binding, and type—a respect for the physical thing—the craft of the printer rather than the genius of the author" (Adler, 1941, p. 11). This critical insight about the separation between the message and its medium suggests that it may be sensible to position marginalia as a third independent component of any particular copy of a text, regardless of its format.

Evidence suggests that annotation habits, motivation, and content differ for readers of print and electronic texts. Marshall and Brush (2004) instructed 11 students to first read and annotate a print copy and then add their comments to an electronic version visible to the entire class. They found that students wrote only one-fourth as many e-annotations as print marginalia (379 versus 1535). Reasons for the reduced volume could include (a) real or perceived additional effort needed to add e-annotations, (b) comfort sharing in personal versus public venues, or (c) instinctive quality-control filtering of first-blush print marginalia for sharing in the online forum. Marshall and Brush also found that the electronic notes were twice as likely to contain semantic content (in contrast to underlines, highlighting, asterisks, etc.) and that they were more likely to employ complete sentences and correct grammar.

3.3. Social reading and marginalia

Reading may appear to be a solitary activity, primarily undertaken for individual purposes; however, Taylor stresses that "whether carried out alone or in the context of a group, reading is inherently social"

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