

AUPresses Digital Book Publishing Survey Report

June 2019

The Association of University Presses and the AUPresses Digital Publishing Committee have regularly undertaken a survey of digital book publishing strategies within the membership community since 2010. The survey has run on a biennial schedule since 2015; the 2019 survey is the eighth report from this program. This year, the Committee added a number of questions about audiobook publishing—a burgeoning area of interest within the AUPresses community.

2018-2019 Digital Publishing Committee

Lynn Fisher, Toronto, Chair Michael Boudreau, Chicago Darcy Cullen, British Columbia Taylor Dietrich, Cambridge Teresa A. Ehling, MIT Kevin Hawkins, North Texas Beth Kressel Itkin, Vanderbilt Jeremy Morse, Michigan Bonnie Russell, Wayne State Clara Totten, Georgetown Gita Manaktala, MIT, Board liaison Angelica DeVoe, AUPresses staff liaison

Survey report prepared by Brenna McLaughlin, AUPresses. Questions: bmclaughlin@aupresses.org.

Contents

Survey Participation	2
General Digital Books Program Information	3
Formats and Production Workflow	10
Accessible EPUBS	12
Audiobooks	13
Digital Discovery and Marketing	15
Perspectives and Concerns	17

Survey Participation

	2015	2017	2019
# of Presses	74	64	51
% of Membership	54%	45%	34%

Press Size*

	Survey Participants	% of Participants	(est.) # Membership	(est.) % of <u>Membership</u>
Group 1	27	53%	97	64%
up to \$1.5 m	illion			
Group 2	7	14%	16	11%
\$1.5 to 3 mill	lion			
Group 3	10	20%	19	13%
\$3 to 6 millio	on			
Group 4 over \$6 milli	10 ion	14%	14	9%

* There are several important elements to note about the press-size group assignments. First, these groups are based on *net annual book sales*, so will not reflect significant journals programs, publishing services, or other sources of revenue that may affect how an organization operates. Second, the assignment of a Group label is only confidently known for presses which participate in the Annual Operating Statistics program (61). Survey participants here are selfassigning groups, and there is the possibility that an individual may have reported a group level based on a set of numbers different than those used in the Operating Statistics. The Association itself makes informed, but not omniscient, Group assignments for many presses that do not currently participate in the Operating Statistics; the Group breakdown for the entire membership is thus only estimated. Third, group representation was not evenly distributed in the survey. While 71% of (est.) Group 4 presses participated, only 28% of Group 1 presses took part (44% of Group 2, 53% of Group 3.)

Departments/Roles

Primary respondents for their press included those whose primary job responsibility is:

- 37 Press director
 4 Digital publishing/digital content
 2 Business
 2 Marketing/sales
 2 Production/design
 1 IT
 2 Others (accession and duction to the plane prime for large set of the plane plane plane)
- 3 Other (operations, production technology, mix of roles)

General Digital Books Publishing Program Information

Questions in this section have been revised and made more specific since the 2017 report. For example, rather than asking generally if a press is selling ebook titles to individuals, the survey now splits this into two questions about whether ebooks are sold to individuals via the press website and whether ebooks are sold to individuals via partners/vendors. In 2017, 94% of responding presses indicated that they sold ebooks to individuals as a general strategy for distributing digital book content. In 2019, 61% of presses who responded to Q1 sell ebooks to individuals via their own website, whereas 97% of Q3-responding presses offer these types of sales via vendors. (Because a number of participants skipped each of these questions, these represent 55% and 92% of the total survey-participating presses.)

1. Our press is currently offering the following ebook ecommerce options through the press website (check all that apply):

	n=46
Ebook sales to individuals	28
Ebook sales to institutions	13
Ebook Rentals	6
Chapter Sales	3
Chapter Rentals	0
Subject- or Press-specific Ebook Collections	7
Open Access (OA) Content	26
Print/Ebook Bundling	3
Book-based Apps	2
Enhanced Ebooks	6
Digital Shorts	7
Web-only Publications	10
Other (please specify)	16

Other included:

• None (7)

- Audiobooks

- Course or textbook supplementary materials (2)
 Bundle print/multimedia/web access
- · Web content subscriptions to individuals and institutions
- "Modular content, data visualizations, digital feature articles, and highly designed/accessible summaries of monographs"
- Is your press planning to start releasing any of the following through the press website in 2019/20 (check all that apply):

	n=34
Ebook sales to individuals	7
Ebook sales to institutions	1
Ebook Rentals	0
Chapter Sales	2
Chapter Rentals	0
Subject- or Press-specific Ebook Collections	2
Open Access (OA) Content	3
Print/Ebook Bundling	1

Book-based Apps	0
Enhanced Ebooks	1
Digital Shorts	1
Web-only Publications	4
N/A	16
Other (please specify)	3

Other included mention of new website capacity being needed, or near-term plans for some offerings.

3. Our press is currently offering the following ebook sales options through vendor partners (check all that apply):

	n=49
Ebook sales to individuals	47
Ebook sales to institutions	46
Ebook Rentals	23
Chapter Sales	13
Chapter Rentals	7
Subject- or Press-specific Ebook Collections	28
Open Access (OA) Content	26
Print/Ebook Bundling	6
Book-based Apps	3
Enhanced Ebooks	8
Digital Shorts	7
Web-only Publications	1
Other (please specify)	1

Other: Subscription-based web content

4. What types of OA (Open Access) projects has your press published, or is in the process of publishing? (Check all that apply.)

	n=50
Specific series made OA	9
Individual titles made OA	32
Back list OA content	28
Front list OA content	23
OA Textbooks/OER (Open Educational Resources)	13
None	7
Don't Know	1
Other (please specify)	8

Other included:

- Interactive scholarly works
 Select digital archives
- A collected papers edition freely available online, not termed "OA"
- The elaboration that all publications or all monographs are OA, sometimes after an embargo (4)

5. What are your OA publishing plans for 2019/2020?

	n=50
Increase number of OA titles published	13
No change	26
Begin publishing OA titles	6
Other (please specify)	5

Other included:

- OA plans contingent on funding (2)
 Decrease after funded project ends
- Exploratory research and funding applications
- Providing assistance to institutional OER/OA projects

Note: 57% of presses who selected "None" in Q4 plan to begin some OA publishing activity in 2019/2010.

6. What are your OER publishing plans for 2019/2020?

	n=48
No plans to publish OER resources	30
Begin publishing	3
Continue publishing	4
No change	8
Other (please specify)	3

Other included:

- Expand support or assistance to institutional OER projects (2)
- Explore OER potential for list
- 7. If you publish in OA, how are your OA projects being funded? (Check all that apply.)

	n=47
Author fees	8
Dept. subventions from author's institution	18
Press funded/subsidy	18
Participation in an OA program (e.g., Knowledge	19
Unlatched)	
Funded through TOME (AAU/ARL/AUPresses)	6
Don't publish in OA	8
Other (please specify)	18

Other included:

- Outside grants, including Mellon and/or NEH programs (10)
- Funding from press's institution or library partnerships (6)
- Author funding that is not a set fee or departmental
- Mix of author funds, print sales, press subsidy, third-party program support

8. Where does your press post files of OA books? (Check all that apply.)

	n=48
Press website	25
Press's university Institutional Repository (IR)	20
Author's home IR	5
OA Funder's IR	11
MUSE Open	14
eBook Aggregator as OA ebook	13
OAPEN library	15
Other (please specify)	19

Other included:

JSTOR

HathiTrust

- Retail channels as a free ebook
 Wherever a funder requires
- Non-IR platform hosted by press or institution
- Several listed discovery platforms (such as DOAB) that do not host OA book files
- 9. In FY2017/18, what percentage of your press's total book revenue came from ebook sales or licenses?

	n=50
0%	2
1-4%	11
5-9%	8
10-14%	8
15-19%	15
20-24%	3
25-30%	2
>30%	0
Don't know	1

Comments included a note from one press that they have seen a decrease in this number, and a mention that the availability of OA PDF files of books seems to have a greater (lessening) effect on the sale of commercial ebook formats than on print.

Note: FY2016 numbers from the previous survey report showed that 76% of presses received less than 15% of their book revenues from ebooks. Reported FY2018 show that 40% of presses are now receiving more than 15% of their book revenue from ebook format sales or licenses. This tracks against the AUPresses Annual Operating Statistics, which show the share of net sales coming from ebook aggregators and retailers rising from about 12% in 2015 to about 15% in 2018.

10. Approximately what percentage of this FY2017/18 ebook revenue came from the following sources?

Averages are based on an n=# of presses reporting revenue above 0 in that channel 14 respondents indicated they did not know the channel breakdown

Channel	n	Average
Consumer Retail (e.g., Kindle, iTunes)	30	51%
Aggregators/Reference Platforms (e.g., Ebsco, MUSE)	30	47%
Institutional Sales (e.g., Press direct-to-library)	5	18%
Textbook Vendors (e.g., VitalSource, Follett)	11	3%
Press Website Ebook Sales	14	4%
Other (please specify)	5	N/A

Other included small amounts from partners, public library vendors, and other channels respondents were not sure how to classify.

11. In FY2018/19, what percentage of your press's total book revenue do you <u>expect</u> to come from ebook sales or licenses?

	n=49
0%	2
1-4%	10
5-9%	6
10-14%	10
15-19%	13
20-24%	4
25-30%	3
>30%	0
Don't know	1

Comments included a note that one press is "reviewing whether or not to continue selling ebooks since uptake is so low."

12. How does your press staff handle publishing of digital books? (Check all that apply.)

	n=50
Tasks are added to traditional responsibilities of existing staff	41
We have an e-pub/ebooks manager to coordinate activity	10
We have dedicated digital marketing staff	2
We have dedicated digital sales staff	2
We have dedicated digital production staff	3
Digital books are handled by IT staff	4
Freelance/outsourced	16
Vendor	16
Other (please specify)	5

Other included a split Marketing Assistant/Digital Publishing Coordinator position, and further details about some of the responsibility divisions such as new digital production tasks falling to inhouse staff while distribution of ebooks is all outsourced.

13. In which of these technologies does your press have in-house expertise? (Check all that apply.)

	n=50
EPUB/ebook production and editing	21
Website design (HTML/CSS)	23
InDesign for digital publishing (EPUB/XML output)	21
Mobile app development	2
XML programming (XQuery/XPath/XSLT/XSL-FO, etc.)	11
Web programming (PHP, Javascript, Drupal, etc.)	11
None of the above	13
Other (please specify)	4

Other included:

- Metadata and CMS
 Institutional expertise available to press
- Digital video, data visualization, modular digital content
- 14. We provide digital access to book content through the following vendors, (check all that apply):

···[•·[•··]/·			
	n=50		
ACLS Humanities EBook	20	HathiTrust	7
Aer.io	1	Intel Education Study (fmly Kno)	1
Alexander Street Press	11	Kobo	32
Amazon Kindle	43	Kortext	9
Apple iBookstore	31	Knowledge Unlatched	18
Axis 360 (Baker & Taylor)	14	Manifold	3
B&N Nook	35	Microsoft ebooks	1
Biblioboard	4	MUSE (UPCC)	32
Books 24X7	3	OverDrive	31
Books at JSTOR	33	Playster	0
Bookshare (print for disabled dist.)	12	Press website	22
Cambridge Online	3	ProQuest (EBL, Ebrary,	43
Canadian Electronic Library	2	MyiLibrary, etc.)	
Chegg	22	Publishers Row	1
Cloud Library by Biblioteca	10	Questia	11
(fmrly 3M Cloud Library)		RedShelf	14
CNPIEC	9	Scribd	10
Copia Interactive	6	Slicebooks	2
Credo Reference	3	University Readers	8
Dawsonera (UK)	9	University Press Scholarship	12
DeGruyter	9	Online (Oxford)	
ebooks.com	21	VitalSource/Coursesmart	20
EBSCO Ebooks (formerly netLibrary)	41	(Ingram)	
Follett Digital/Cafe Scribe	17	XanEdu (incl. AcademicPub)	5
Fulcrum	4	None	0
Gardners	24	Other (please specify)	9
Google Play	31		

Other included BibliOpen, Bolinda, Booktopie, CEEOL, Faithlife Logos Research, iFlipd, Libri, LIX, Odilo, Perlego, Spoonread, Rockstand, Thomson Reuters, Trajectory, Vida, Wheelers, Wook.

Note: The pool of responding presses has changed somewhat; the small differences in the most popular platforms and channels from 2017 to 2019 may not be very meaningful. Gardners Books, a UK digital media wholesaler, has not appeared as an option in prior surveys but is among the top 10 in 2019; RedShelf is another newly listed channel that has greater than 25% participation.

15. How are you distributing ebook content to vendors:

	n=48
Press system	12
Bibliovault	13
Ingram CoreSource	18
Other (please specify)	6

Other included:

 Casemate Academic 	 eBound
 CodeMantra 	 Firebrand/Eloquence (3)

16. For ebook sales to institutional libraries, your press is participating in the following purchase models (check all that apply):

	n=43
Perpetual Access Purchase	40
Subscription Collections	36
Short Term Loans (STL)	24
Patron Driven or Demand Driven	36
Acquisition (PDA/DDA)	
Evidence Based Acquisition (EBA)	22

17. Do you embargo any titles from these purchase models? (Check all that apply.)

	n=45
Frontlist from Subscriptions	5
Frontlist from STL	10
Frontlist from PDA or DDA	8
Frontlist from EBA	3
No	20
Other	11

Other included textbooks and titles with course adoption potential (excluded from all or some of these models), trade titles, or reference works. Many indicated these decisions are made title-by-title rather than categorically.

18. We use the following service(s) to help track and take action on instances of copyright infringement:

	n=48
Digimarc Guardian (fmrly Attributor)	3
Copyright Infringement Portal	2
Link-Busters	3
MarkMonitor	0
None: In-house efforts only	28
None: We do not generally pursue	11
pirated editions	
Don't Know	0
Other (please specify)	3

Other included:

- National associations or groups
 Preliminary discussions with Link-Busters
- 19. What are your plans for using copyright infringement services for 2019/20:

	n=50
Start using third party service	1
Stop using third party service	2
Continue using third party service	6
Unsure at this time	26
N/A	15

Formats and Production Workflow

20. Our press ebook content is available in the following formats (check all that apply):

	n=51
PDF	49
EPUB 2	31
EPUB 3	30
Kindle	37
HTML/XHTML	8
HTML5	6
MOBI	31
DAISY	5
iPhone/iPad apps	10
Android apps	6
XML (other than EPUB)	13
None	0
Don't know	0
Other (please specify)	1

Other responses mentioned a customized format, and highlighted that not all press ebook content is available in each of the formats.

Note: The 2017 survey labeled the EPUB options "EPUB" and "EPUB 3"; whereas "EPUB 2" and "EPUB 3" were answer options in 2019. There was little difference between the number of presses offering some flavor of EPUB, however: 89% of 2017 responding presses and 86% of 2019 respondents.

21. We are incorporating XML into our production workflow to the following extent:

	n=49
XML-first or early workflow	9
XML output from InDesign or other	6
software using templates	
XML output from typesetter/printer	4
Post-production XML conversion	12
None of the above	17
Don't know	1

22. If your press creates XML during the production process, how is XML created? (Check all that apply.)

	n=44
Scribe	6
eXtyles (Inera)	0
Tagged InDesign via custom process	2
MS Word with styles transformed to XML tags	7
via a custom process	
Editoria	2
N/A	26
Other (please specify)	3

Other included: Typefi

23. How are book XML files being used at your press? (Check all that apply.)

	n=45
Archival or canonical format	15
Generation of typeset books	8
Search and discovery	3
Display and reading (includes conversion to HTML by software or platform)	8
Creation of new products/repurposing content	9
N/A	19

24. What percentage of your list is created as or converted to an ebook format (any version)?

	n=51
None	1
up to 25%	4
26 - 50%	1
51 - 75%	7
76 - 100%	38

Note: In the 2017 survey, ~50% of responding presses selected 100%; in 2019, 75% of presses are creating as or converting their full list to an ebook format or formats.

25. What are your back list digitization plans?

	n=45
Digitizing back list is an ongoing project	27
Back list digitization will begin in next 1-2 years	1
Back list digitization is complete	8
No plans to digitize back list	5
Hope to but do not have the resources to undertake	4

Comments here were interesting. Several highlighted the reality of the many new presses in recent years—all press titles have been born digital, so the question is moot. Four presses noted that at this time they digitize back list titles on a case-by-case basis. Several others noted that their back list digitization, though less than 100%, is as "complete" as would ever be possible. Lack of rights and insoluble permissions issues, or lack of a full copy to be digitized in the first place, were cited as reasons for this.

Accessible EPUBs

26. If you distribute any ebooks in EPUB 3 format, which of the following statements about EPUB accessibility (for visually impaired readers, etc.) best applies to your workflow? (Check all that apply.)

	n=49
N/A, we do not distribute in EPUB 3 format.	14
We currently make accessibility features part of our workflow via	10
instructions to conversion vendors.	
We currently make accessibility features part of our workflow via in-house	6
intervention/editing.	
We use a tool to generate EPUB 3 that automatically incorporates some	5
accessibility features (e.g., Scribe).	
We do not currently incorporate accessibility features into our workflow.	11
Don't know	8

27. If accessible EPUB is part of your workflow, which of these features do you currently try to implement, whether through vendor specifications or manual editing/intervention? (Check all that apply.)

	n=42
N/A, accessible EPUB not part of our workflow	24
Use of EPUB 3 structural semantics (using IDPF [International Digital	7
Publishing Forum] vocabulary to identify different types of content)	
Include schema.org accessibility metadata in EPUBs	4
Provide detailed navigation (table of contents) that enables readers to	8*
access all relevant levels of the book	
Render tables as HTML5 tables, not as images*	
Distinguish decorative images (ornaments, etc.) from substantive	4
illustrations	
Provide detailed descriptions of images using HTML5 figure elements	5
Provide detailed descriptions of tables	3
Include captions or transcriptions for time-based media	4
Include information about accessibility in metadata	3
Other (please specify)	6

- 10

Other included:

- Not sure (3)
 PDF ebooks are 508 compliant
- Limited interventions, captions on video elements

* Due to an error in the survey instrument, these two separate items were presented in a single answer option. It is unclear how presses determined a response.

28. If you add descriptions of complex images to your EPUB, who creates them?

	n= 27
We require the author to provide them	1
We request author's help but create in-house if necessary	4
We create them in-house	0
Vendor or freelancer	5
Don't know	9
N/A	6
Other (please specify)	2

Other included two presses that are planning to ask this of authors, one that currently uses a vendor for remediation.

Audiobooks

This section is new for the 2019 Survey, as audiobooks are becoming more popular digital formats for university presses. The survey showed 27% of responding presses are currently producing audiobooks; that goes to 31% including presses who indicated they have plans to experiment with audiobooks in the next year. Questions 31-34 were only asked of those respondents who answered "Yes" to Q29.

29. Have you published audiobooks or are you doing so in 2018/19?

	n=51
Yes	14
No	37

30. If no, what is keeping you from publishing audiobooks?

	n=41
N/A	4
Don't know where to start	2
Our books don't lend themselves to this format	9
Cost is prohibitive	6
No staff to dedicate to this	4
Starting in 2019/20	2
Other (please specify)	14

Other included:

Lack of demand

- Tentative plans to experiment with 1 audiobook/year (2)
- Prefer to license (5)
- Cost plus other concerns (5)

Note: 19% of <u>participating</u> Group 1 presses have published audiobooks, 43% of Group 2, 40% of Group 3, and 29% of Group 4. Amongst the reasons selected for why a press does not, only Group 1 presses chose "no staff," and more Group 1 than other sizes selected "our books don't lend themselves to this format." Presses across every group size reported that they prefer to license audiobook rights.

31. Where have you released your audiobooks? (Check all that apply.)

	n=14
Audible	10
Apple iTunes	1
КОВО	2
Overdrive	3
Through producers' distribution network	10
Other (please specify)	2

Other included:

Findaway
 Press website

32. How have you produced your audiobooks? (Check all that apply.)

	n=14
Licensed to third party (e.g., Audible)	10
Prepared in-house	2
Worked with audiobook producer	7
Other (please specify)	1

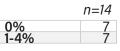
Other included:

- Author supplied audio master files
- 33. If you worked with an audiobook producer, please identify the firms you are currently working with (check all that apply):

	n=13
ACX (Audible)	5
Blackstone	1
Deyan Audio	0
ListenUp	3
Pro Audio Voices	0
Recorded Books	1
Redwood (University Press Audiobooks)	9
Spoke Media	0
Tantor	5
Other (please specify)	1

Other included The Talking Book

34. What % of your book revenue came from audiobooks in 2017/18?



Note: No press reported higher than 4% book revenue from audio formats. Comments on this question noted that some presses selecting 0% do see negligible revenue of under 1%.

Digital Discovery & Marketing

35. Our content is available for discovery/indexing through the following vendors (check all that apply):

	n=46
Ebsco Discovery Services	38
ProQuest Discovery Services / Summon	36
Elsevier Scopus Indexing Service	7
Ex Libris' Primo Central	11
Clarivate Analytics Indexing Service (Web of Science)	6
WorldCat/OCLC WMS knowledgebase	26
Other (please specify)	6

Other included:

 Dimensions 	- DOAB
 Thomson Reuters 	 Wherever library aggregators send it
 Not sure (2) 	 Pending Scopus submission

36. Our press participates in the following consumer-facing digital discovery programs (check all that apply):

	n=51
Google Books for Publishers	38
Amazon Search Inside the Book	45
B&N See Inside	28
Chapters/Indigo See Inside the Book	5
HathiTrust Digital Library	6
Dial-a-Book First Chapter	9
Goodreads	16
None	3
Don't Know	2
Other (please specify)	1

Other included Apple

37. We offer the following types of promotional free book content/access via our own website or institution (check all that apply):

	n=49
Online readable and/or searchable full text	7
Online readable and/or searchable excerpts	22
Downloadable full text	5
Downloadable excerpts	14
None	11
Don't know	1
Other (please specify)	8

Other included:

- Google previews integrated into press website (5)
- Digital videos, data visualizations, and modular content
- Online excerpts limited to TOC
- Podcasts, supplemental textbook marketing, sample PDF text

38. Our press uses digital review/comp copies for (check all that apply):

	n=49
Media reviews	38
Author copies	5
Exam copies	28
Desk copies	18
None	8
Other (please specify)	7

Other included:

- Prize submissions (2)
 Author tenure packets
- Service providers such as NetGalley, Edelweiss, and Vital Source
- On request for these uses, but print still preferred by many
- 39. We use the following identifiers to label/track digital book content (check all that apply):

Single ISBN for all digital formats24Separate ISBNs per format24Separate ISBNs for each vendor24Separate ISBNs for each sales channel24DOI (title level)14DOI (chapter or other sub-work level)25	3	0
Separate ISBNs per format24Separate ISBNs for each vendor3Separate ISBNs for each sales channel3DOI (title level)14DOI (chapter or other sub-work level)3		n=51
Separate ISBNs for each vendorSeparate ISBNs for each sales channelDOI (title level)14DOI (chapter or other sub-work level)	Single ISBN for all digital formats	24
Separate ISBNs for each sales channelDOI (title level)14DOI (chapter or other sub-work level)	Separate ISBNs per format	24
DOI (title level)14DOI (chapter or other sub-work level)9	Separate ISBNs for each vendor	1
DOI (chapter or other sub-work level)	Separate ISBNs for each sales channel	1
	DOI (title level)	14
	DOI (chapter or other sub-work level)	9
	ISTC	0
In-house identifier 2	In-house identifier	2
Don't know	Don't know	1
Other	Other	3

Other included:

- 1 ISBN for Library/Institutional; 1 ISBN for consumer/retail (2)
- DOIs assigned to our ebook content by third-party
- 40. In what format(s) do you distribute metadata to trading partners? (Check all that apply.)

	n=49
ONIX 2	29
ONIX 3	26
Spreadsheets	22
MARC records	8
Other (please specify)	7

Other included:

- Not sure of ONIX version (4)
 KBART
- 41. How do you distribute metadata? (Check all that apply.)

	n=49
We distribute our own ONIX	15
A vendor distributes ONIX for us	37
In-house (spreadsheets)	9
OCLC WorldCat	3
Other (please specify)	2

Other included in-house distribution of MARC records (2)

42. Which department(s) is (are) responsible for managing metadata at your press? (Check all that apply.)

	n=50
Sales	16
Marketing	36
Production	11
Acquisitions Editorial	11
Managing Editorial	7
Operations	8
IT	9
Digital Publishing	10
Business / Finance	5
Other (please specify)	2

Other included press director (2)

Perspectives and Concerns

43. Please describe your press's overall view of, or goals for, digital book publishing.

Over the history of this survey, one of the most common refrains in response to this question is some version of "we want our books to reach as many readers as possible, in whatever format they want." This sentiment is still echoed in 2019, but it is fainter. More frequently, especially among the smaller (Groups 1 and 2) presses, there is expressed a sense that it is time to evaluate the experience of the last decade: weighing the lived demands of their audiences against the promises of various digital publishing strategies. A number of presses reported seeing that print is often preferred by both readers and funders, that print or straight PDF is often preferred over enhanced ebook options by students, that even in OA PDFs can be preferred over formats with greater functionality. These presses were all reconsidering their ebook strategies.

Responses that mentioned backlist digitization represented very mixed opinions: from eagerness to pursue this further, to resignation that the rights and permissions "tangle" presented by backlist was never going to be solved with the resources at hand, to a critical view of the amount of grant monies that go to digitizing backlist for which there has been no demand while current scholarship begs for investment.

However, there was also a greater sense from more presses that they have (or are on their way) to an effectively tooled operation for the kinds of digital book publishing that they are doing, and even well-situated to address new experiments. This attitude occurred more frequently among the larger (Groups 3 and 4) presses, but was even to be found among the smallest publishers. It was a Group 3 press, however, that simply responded to this question: "Jaundiced."

Perhaps another Group 3 press summarized it all the best: "Digital book publishing' is a bit of a catch-all."

44. Please select up to 3 (three) topics below that you and your Press will focus on in 2019/20.

Audiobooks	18
Access/Formats for People with Disabilities	14
Library-Press Collaborations	12
Open Access (OA)	11
Metadata	8
OA Textbooks (OER)	8
POD for Frontlist	8
Social Media	8
Discovery & Search Engine Optimization (SEO)	7
Rights & Contracts; Fair Use & Permissions	7
Content Management System (CMS)	6
Selling Ebooks from press website	6
Professional Development & Retraining	5
Other topics (please specify) or comments:	5
Ebooks in international markets	4
Ebook Subscription Platforms & Models	4
Business Model Experiments	3
Digital Asset Management (DAM)	3
Lifecycle and Costs of Ebooks	3
Identifiers (e.g., ISBN, DOI, ISTC)	2
XML workflow	2
App development	1
Enhanced Ebooks	1
Future of Libraries	1
Patron/Demand Driven Acquisitions (PDA/DDA)	1
Preservation	1
Shared Infrastructure	1