



# DIGITAL BOOK PUBLISHING IN THE AAUP COMMUNITY

## SURVEY REPORT: 2017

### INTRODUCTION

This is AAUP’s seventh survey to track the extent to which various digital book publishing strategies are being adopted within the membership community; the first since the Digital Publishing Committee moved the survey to a biennial schedule in 2015. Throughout the report, percentages are based on the number of responses to the specific question, and rounded. Three appendices present select data from other AAUP surveys and data collection programs.

### SURVEY PARTICIPATION

	<u>SPRING 2014</u>	<u>SPRING 2015</u>	<u>2017</u>
PRESSES	75	74	64
% OF MEMBERSHIP	56%	54%	45%

#### PRESS SIZE

Publishers represented in the 2017 survey fall into the following annual net sales groups:

- Group 1 (up to \$1.5 million):** 35
- Group 2 (\$1.5 to 3 million):** 10
- Group 3 (\$3 to 6 million):** 10
- Group 4 (over \$6 million):** 9

#### DEPARTMENTS/ROLES

One survey response was collected from each participating press. This ensures more quantitative accuracy, but narrows the range of perspectives shared in the more qualitative questions. Primary respondents reported the following main areas of responsibility:

<b>Press Director/Publisher:</b>	43	<b>Editorial:</b>	1
<b>Digital Publishing:</b>	5	<b>Production/Design:</b>	2
<b>Marketing/Sales:</b>	7	<b>IT:</b>	2
<b>Business/Finance:</b>	4		

# SURVEY QUESTIONS

## SECTION I: GENERAL DIGITAL BOOK PUBLISHING QUESTIONS

### 1. Our press is pursuing the following general digital publishing strategies:

Respondents could select all applicable choices. Strategies are listed in order of greatest adoption.

n=62

STRATEGY	# OF PRESSES	%
Ebook individual sales	58	94%
Backlist SRDP/POD* programs	56	90%
Selected titles through aggregators	51	82%
Frontlist SRDP/POD programs	48	77%
POD for foreign distribution	40	65%
Open Access (OA) Content**	38	61%
Full-text search and discover	35	57%
Ebook rentals	27	44%
Subject or press ebook collections	26	42%
Enhanced ebooks	17	27%
Web-only publications	15	24%
Print/ebook bundling	12	19%
Digital shorts	11	18%
Book-based apps	9	15%
Online course and MOOC content	9	15%
Other (please specify)—Additional responses included:		
• Book & journal compilations		
• Ebook collections by subscription		
• Online interactive tools and feature articles based on published research		

The biggest shifts in trends since 2015 can be seen in the publication of OA content and in a possible move away from digital shorts.

Presses publishing OA book content has increased from 36% in 2015.

Digital shorts, which in 2015 had seen increased numbers of presses (19, or 26%) experimenting with the model, has dropped to 11 presses (18%) in 2017. Six presses who reported in both 2015 and 2017 no longer publish digital shorts.

\* Short-Run Digital Printing/Print-On-Demand

\*\* See Question I.2 below

### 2. What types of OA (Open Access) projects has your book-publishing program undertaken?

Respondents could select all applicable choices.

n=61

TYPE OF PROJECT	# OF PRESSES	%
Specific series or select individual titles made OA	29	48%
OA content in partnership with library or other partner	23	38%
Backlist OA content	24	39%
Frontlist OA content	18	30%
OA Textbooks/OER (Open Educational Resources)	10	16%
None	18	30%
Don't know	1	2%
Other (please specify)—Additional responses and clarifications included:		
• Future plans (6)		
• All publications (2)		
• Grant-funded interactive works		

**3. In FY2016, what percentage of your press's book revenue came from ebook sales or licenses?**

*n=62*

<u>% REVENUE</u>	<u># OF PRESSES</u>	<u>% REVENUE</u>	<u># OF PRESSES</u>
0	2	7-10%	10
1-3%	9	10-15%	16
3-5%	8	15-20%	10
5-7%	4	>20%	3

**4. What percentage of FY2016 ebook revenue came from the following sources:**

*10 respondents indicated that they did not know the channel breakdown; 5 presses skipped the question.*

*n=49*

<u>SOURCE</u>	<u>AVERAGE % OF EBOOK REVENUE</u>
Consumer Retail <i>e.g., Kindle, Nook, Google Play, iTunes</i>	50%
Institutional Sales <i>e.g., direct-to-library</i>	8%
Aggregators <i>including reference platforms and specialized online libraries</i>	35%
Textbook vendors	1%
Direct sales <i>from press website</i>	1%
Short-term Digital Loans	1%

A few presses indicated that very small amounts of ebook revenue come from other sources, but none indicated what those sources are.

One press noted that 90% of ebook revenue comes from sales to libraries, through a variety of channels. Several respondents who were not able to report this breakdown indicated that the press's distributor simply doesn't provide that data.

**5. What percentage of FY2017 revenue do you *expect* to come from ebook sales or licenses?**

*n=62*

<u>% REVENUE</u>	<u># OF PRESSES</u>	<u>% REVENUE</u>	<u># OF PRESSES</u>
0	1	7-10%	10
1-3%	8	10-15%	16
3-5%	6	15-20%	12
5-7%	5	>20%	2
		Don't Know	2

## 6. How does your press staff digital book publishing work?

Respondents could select all applicable choices.

n=64

<u>STRATEGY</u>	<u># OF PRESSES</u>
Responsibilities added to existing staff	56
Ebook/E-pub manager coordinates activities	17
Digital marketing staff	9
Digital marketing and/or sales staff	5
Dedicated digital production staff	7
Dedicated IT staff	5
Freelance/outsourced vendor	33

## 7. In which of these technologies does your press have in-house expertise?

Respondents could select all applicable choices.

n=61

<u>OPTION</u>	<u># OF PRESSES</u>
EPUB production and editing	28
InDesign for digital pub. (EPUB/XML output)	29
Web design (HTML/CSS)	34
Web programming (PHP, Javascript, Drupal, etc.)	16
XML programming (XQuery/XPath/XSLT/XSL-FO, etc.)	19
Mobile app development	3
None of the above	14
Other (please specify)— Additional responses included:	
• Basic XML or PHP knowledge (3)	
• Metadata management, database development and management	
• Digital storytelling	

## 8. We use the following services to help track and take down pirated ebooks:

n=63

<u>OPTION</u>	<u># OF PRESSES</u>
In-house efforts only	35
None: we generally don't pursue	19
Digimarc Guardian (was Attributor)	4
Copyright Infringement Portal	1
Link-Busters	4
Don't know	1

Other (please specify)— Additional responses included:

- National Publishers Association (Belgium/Flanders) legal department assists us
- Several presses that do not generally pursue pirated editions noted that they will do so at an author's request.

## 9. We provide digital access to content through the following platforms, vendors, or aggregators:

*Respondents could select all applicable choices. Choices are listed in order of greatest participation.*

*n=63*

<u>VENDOR/AGGREGATOR</u>	<u># OF PRESSES</u>
Amazon Kindle	53
EBSCO Ebooks (formerly netLibrary)	52
B&N Nook	48
ProQuest (EBL, Ebrary, MyiLibrary, etc.)	46
Google Play	43
Kobo	41
MUSE (UPCC)	41
Apple iBookstore	40
Books at JSTOR	35
OverDrive (library)	32
Ingram CoreSource/CoreSource Plus	29
ebooks.com	27
Press website	26
Follett Digital/Cafe Scribe	25
EBSCO Host database products	21
Questia	21
ACLS Humanities EBook	20
Chegg	20
BiblioVault	18
Ingram VitalSource/Coursesmart	17
OverDrive (retail)	17
Dawson UK	16
Knowledge Unlatched	16
Alexander Street Press	15
Bookshare (print for disabled distribution)	15
Scribd	14
UP Scholarship Online (Oxford)	13
University Readers	11
Axis 360 (from Baker & Taylor)	10
Credo Reference	9
Cloud Library by Biblioteca (formerly 3M)	7
HathiTrust	7
Copia	6
OAPEN Library	6
Aer.io	5
Biblioboard	5
Books 24X7	5
Canadian Electronic Library	4
Intel Education Study (formerly, Kno)	4
Slicebooks	3
XanEdu (including AcademicPub)	3
Publishers Row	2
Shelfie	2
Playster	0
None	1

Over time, the top selections have not seen much shake-up. Kindle, Nook, the former netLibrary, the various services under the ProQuest umbrella, MUSE, Google, Kobo, and Apple continue to be the most common outlets for ebooks.

## SECTION 2: FORMATS AND PRODUCTION WORKFLOW QUESTIONS

### 1. Our press makes content available in the following formats:

Respondents could select all applicable choices. Formats are listed in order of greatest adoption.

n=61

FORMAT	# OF PRESSES	%
PDF	58	95%
EPUB	53	87%
MOBI	40	66%
PRC/AZW (Kindle)	32	52%
EPUB3	28	46%
XML (other than EPUB)	14	23%
iPhone/iPad apps	9	15%
HTML/XHTML	9	15%
HTML5	5	8%
Android apps	4	7%
DAISY	4	7%

Other (please specify)—comments offered here included:

- No digital formats available to consumers/readers
- MOBI is no longer required by Amazon, so at least one press has stopped producing that format

### 2. For the ebooks that your press produces, quality control is performed:

Respondents could select all applicable choices.

n=61

OPTION	# OF PRESSES	%
Formally by designated in-house staff	34	56%
Informally by in-house staff (incl. interns/volunteers)	18	30%
By freelance proofreaders	12	20%
By ebook conversion vendor(s)	25	41%
By authors	4	7%
No routine procedure	11	18%

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

Respondents could select all applicable choices.

n=60

OPTION	# OF PRESSES	%
XML-first or -early workflow	13	23%
XML output from InDesign, other software (using templates)	6	10%
XML output from typesetter/printer	9	15%
Post-production XML conversion	14	23%
None of the above	29	48%
Don't Know	1	2%

Additional comments provided here:

- Via Typeseterra, makes quasi-XML tagging of Word MS

#### 4. If your press is using an XML-first or -early workflow, how is XML created?

n=53

<u>OPTION</u>	<u># OF PRESSES</u>
Scribe	8
PShift (Toronto)	2
eXtyles (Inera)	3
Tagged InDesign (via custom process)	2
MS Word styles transformed to XML tags	4
N/A	35

Other (please specify)—Additional responses included:

- Forthcoming Editoria product utilizes an HTML-based workflow
- Typefi
- Testing/evaluating different options (2)

#### 5. How are book XML files at your press being used?

Respondents could select all applicable choices.

n=59

<u>OPTION</u>	<u># OF PRESSES</u>
Archival or canonical format	18
Generate typeset books	9
Searchable and/or viewable content for website	7
Create new products/repurposing	6
N/A	30

Other (please specify)—Additional responses included:

- Online content platforms (4)

#### 6. What percentage of your list is created as or converted to an EPUB (any version) format? (This does not include any PDF formats.)

n=61

<u>% OF LIST</u>	<u># OF PRESSES</u>
0	4
Up to 25%	10
26-50%	5
51-75%	9
76-100%	30
Don't know	3

## SECTION 2A: BUILDING ACCESSIBLE EPUBS

The questions below are new in 2017, and were not asked of presses that do not produce EPUB files.

### 1. If you distribute any ebooks in EPUB3 format, which of the following statements about EPUB accessibility (for visually impaired readers, etc.) best applies to your workflow?

Respondents could select all applicable choices.

n=56

STATEMENT	# OF PRESSES
We currently make accessibility features part of our workflow via instructions to conversion vendors.	8
We currently make accessibility features part of our workflow via in-house intervention/editing.	6
We use a tool to generate EPUB3 that automatically incorporates some accessibility features (e.g., Scribe).	7
We do not currently incorporate accessibility features into our workflow.	5
N/A, we do not distribute in EPUB3 format.	22
Don't know	5

### 2. 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?

Respondents could select all applicable choices.

n=52

FEATURES	# OF PRESSES
Use of EPUB3 structural semantics (using IDPF vocabulary to identify different types of content)	9
Provide detailed navigation (TOC) that enables readers to access all relevant levels of the book	16
Render tables as HTML5 tables, not as images	8
Distinguish decorative images (ornaments, etc.) from substantive illustrations	7
Provide detailed descriptions of complex images using HTML5 figure elements	3
N/A, accessible EPUB not part of our workflow	32
Other (please specify)— Additional responses included: <ul style="list-style-type: none"> <li>• Don't know (2)</li> <li>• In process of establishing a workflow for accessibility</li> <li>• Alt text for images, programmed XML that can be picked up by text-to-voice reader</li> <li>• Require authors to write Alt text and Described By text, caption videos</li> </ul>	

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

n=55

RESPONSE	# OF PRESSES
We require the author to provide them	5
We request author's help but create in-house if necessary	3
We create them in-house	3
N/A, we do not add image descriptions	37
Don't know	7



## SECTION 3: DIGITAL DISCOVERY AND MARKETING QUESTIONS

### 1. Our press participates in the following digital discovery programs:

*Respondents could select all applicable choices. Programs are listed in order of greatest participation.  
n=61*

PROGRAM	# OF PRESSES	%
Amazon Search Inside the Book	55	90%
Google Books for Publishers	49	80%
Barnes & Noble See Inside	37	61%
Goodreads	20	33%
Thomson Reuters Indexing Service	16	26%
Dial-A-Book First Chapter	14	23%
Bowker Indexing Service	13	21%
Chapters/Indigo See Inside the Book	8	13%
Summon Unified Discovery	6	10%
HathiTrust Digital Library	5	8%
None	2	3%
Don't Know	2	3%
Other (please specify)— Additional responses included:		
• SciVerse Scopus (2)	• EBSCO Discovery	
• Google Scholar	• Book-2-Look	
• ERIC Indexing	• Philosophy Documentation Center PhilPapers	
• Produce and publish SEO microcontent along with full text on all books for free OA discoverability		

### 2. We offer the following types of promotional free book content/access via our own website or institution:

*Respondents could select all applicable choices.  
n=61*

FREE CONTENT	# OF PRESSES	%
Online readable and/or searchable full text	12	20%
Online readable and/or searchable excerpts	30	49%
Downloadable full text	9	15%
Downloadable excerpts	21	34%
None	14	23%
Don't know	4	7%
Other (please specify)— Additional responses included:		
• Hi-res book covers		
• SEO microcontent		

### 3. Our press uses digital review/comp copies for the following purposes:

Respondents could select all applicable choices.

n=61

PURPOSE	# OF PRESSES	%
Media reviews	42	69%
Author copies	10	16%
Desk exam copies	30	49%
None	19	31%

Other (please specify)—Additional responses and clarifications included:

- Awards
- Several respondents noted that print is still requested most often, though digital available for these uses.

### 4. We use the following identifiers to label/track book content:

Respondents could select all applicable choices.

n=61

IDENTIFIER	# OF PRESSES	%
Single ISBN (ALL digital formats)	34	56%
Separate ISBNs for consumer and institution/multi-user	7	12%
ISBN (ONE per publisher format)	20	33%
ISBN (ONE per vendor format)	1	2%
ISBN (ONE per sales channel)	0	0%
ISBN-A	0	0%
DOI (work-level)	15	25%
DOI (chapter/sub-work level)	13	21%
ISTC	0	0%
In-house identifier	4	7%
Don't know	1	2%

There has only been a very slow shift away from using a single ISBN for all digital formats—down from 58% of 2015 respondents.

However, the use of DOIs has increased significantly. At the work-level, this adoption is up from 14% in 2015; and chapter-level use has risen from 15%.

Other (please specify)—Additional responses included:

- Separate ISBNs for consumer and institution, plus 1 ISBN for web format
- Vendors assign DOIs to press content (2)

### 5. In what format(s) do you distribute metadata to trading partners?

Respondents could select all applicable choices.

n=61

FORMAT	# OF PRESSES	%
ONIX 2	42	69%
ONIX 3	28	46%
Spreadsheets	42	69%
MARC records	12	20%

Only 5 presses that distribute metadata via spreadsheets do not also provide at least one ONIX format.

This is the first year that the survey offered a choice between ONIX 2 and ONIX 3. In 2017, 85% of respondents provide ONIX of some kind.

## 6. How do you distribute metadata?

Respondents could select all applicable choices.

*n*=60

<u>METHOD</u>	<u># OF PRESSES</u>	<u>%</u>
Vendor/SAAS (ONIX)	46	77%
In-house (ONIX)	20	33%
In-house (Spreadsheets)	29	48%

## 7. Which department(s) is (are) responsible for managing metadata at your press?

Respondents could select all applicable choices.

*n*=61

<u>DEPARTMENT</u>	<u># OF PRESSES</u>	<u>%</u>
Sales	19	31%
Marketing	48	79%
Production	14	23%
Acquisitions Editorial	12	20%
Managing Editorial	8	13%
Operations/IT	15	25%
Digital Publishing	13	21%

Other (please specify)—Additional responses included:

- Director/Administration /Business (4)
- Outsourced to partner (1)
- All departments responsible for some, but only one department pushes it out (2)

## SECTION 5: PERSPECTIVES

*This section canvasses general views of digital publishing issues, and helps to inform the focus of the Association's Digital Publishing Committee. More than 60% of the respondents in this section are press directors.*

### **1. Please describe your press's overall view of, or goals for, digital book publishing:**

32 respondents offered their perspective.

Common themes and key quotes include:

- “Careful, considered approach to digital publishing.” This sentiment was common, and the press quoted here outlined both the limited resources available and yet the considerable array of strategies and experiments the press pursues.
- Presses continue to express a desire to provide book content in the formats which readers desire. However, in 2017 more publishers took pains to note that the occasionally maligned PDF format provides great value—either because it is the only digital format that serves a particular discipline stably and well, and/or because customers (individuals and institutions) still find it the most convenient.
- In comparison—and underlining the diversity of drivers for Association members’ digital book publishing decisions, one press noted: “We are developing internal capacity for multimedia ebook and website publishing since we see an increasing demand from our authors for these options. That may be to do with the media-rich subject areas that we publish in.”
- Digital revenue streams are of significant concern—how to increase ebook revenue, how to sustain mission. One press offered: “Now that the trends in digital versus print revenue have become more steady, it’s clear digital revenue will not be replacing print.” This press approaches digital book strategies as primarily discovery tools, a perspective echoed by other respondents.
- The place of Open Access in book publishing programs was mentioned by a number of respondents. Presses commenting here tend towards views of OA as both a promising mechanism to further the dissemination of scholarly publications and an unfunded, sometimes muddled, aspiration.
- “Digital book publishing is...an additional format, just like hardcover and paperback. Each format has its place, audience, and corresponding strategy, and we try very hard to track trends so we can keep that strategy fresh.”

**2. Please select the 5 (FIVE) topics below that you are most interested in:**

*n=60*

<u>TOPICS</u>	<u># OF RESPONDENTS</u>
Business Model Experiments	28
Metadata	20
Discovery/Search Engine Optimization (SEO)	19
Selling ebooks from press website	19
Ebook Subscription Platforms and Models	19
Open Access (OA)	18
POD for Frontlist	14
Patron/Demand Driven Acquisitions (PDA/DDA)	13
Future of the Humanities	13
Library-Press Collaborations	12
Digital Asset Management (DAM)	12
Professional Development & Retraining	10
Enhanced Ebooks	10
Ebooks in international markets	10
Access/Formats for People with Disabilities	10
OA Textbooks (OER)	9
Future of Libraries	9
Rights & Contracts; Fair Use & Permissions	9
XML workflow	8
Content Management System (CMS)	8
EPUB/EPUB3	6
Identifiers (e.g., ISBN, DOI, ISTD)	6
Short-term Digital Loans	5
Lifecycle and Costs of Ebooks	5
Apps	5
Shared Infrastructure	5
Social Media	4
Access/Preservation	3
Intermural Collaborations	1
Other suggestions for topics included:	
• Subventions	
• Future of readers	

### 3. How great are the following concerns for your press in pursuing digital book publishing strategies?

*Not every press offered a response to each topic.*

ISSUES	NOT A CONCERN	A MILD CONCERN	CAUSE FOR SERIOUS CONCERN	STOPS US IN OUR TRACKS
Accounting for costs and revenue	3	<b>25</b>	13	0
Business Model	1	<b>19</b>	<b>19</b>	1
Digital Assets Management	8	<b>29</b>	4	0
Digital Rights and Contracts	7	<b>28</b>	6	0
Internal Database Systems	7	<b>23</b>	10	0
Metadata	8	<b>26</b>	7	0
Online Piracy	4	<b>25</b>	10	1
Platform Questions	5	<b>24</b>	11	1
Production Issues	9	<b>25</b>	5	2
Resources (Financial)	2	16	<b>17</b>	4
Resources (Staffing)	4	15	<b>17</b>	5
Standards	7	<b>31</b>	2	0
Technology Infrastructure	5	<b>17</b>	16	3
Third-party Rights	7	<b>27</b>	6	0

For the first time, respondents seem less worried overall about these issues. The shift was acknowledged by several in comments—all of the topics are still very important, but they are no longer being faced as significant challenges or limitations.

As in 2015, and indeed in previous years, “Resources”—both financial and staffing—are issues that a majority of presses mark as a serious concern or direct limitation. “Business Model” remains a significant concern to many—but now an equal number of presses find it a more mild concern.

It should be noted that 15 of the 17 “Stops us in our tracks” responses (across all issues) came from the smallest presses. Group 1 presses are particularly likely to be limited due to lack of staff, capital, and infrastructure.

On the issue of staffing for digital book publishing, the largest (Group 4) presses were equally divided between finding this a mild or a serious concern.

In regards to “Online Piracy,” the majority of responding Group 4 presses consider this a serious concern in 2017—an increase over 2015. About a quarter of the participating Group 1 presses do not consider this a concern. Eleven of the presses most concerned over piracy use only in-house efforts to track and take down pirated editions.

In comments, two respondents added that creating accessible ebooks is a major concern.

## APPENDIX A: ADDITIONAL DIGITAL BOOK ASSETS DATA

In February 2016, the Association undertook a brief survey of members (106 participating presses) to discover details about the availability and type of digital/digitized book files, as well as how presses manage and store such files. A few data points from that survey are of interest and included here.

**Total number of in-print books:**

254,076

**Total number of in-print books for which there is a digital file (e.g., PDF, EPUB) available:**

166,668 (66%)

**Total undigitized titles that could be digitized if resources were available:**

56,173

**Where are digital book files stored?**

In-house DAM	30 <i>presses</i>
CoreSource (Ingram)	35
BiblioVault	24
CodeMantra	4
Firebrand	4
Constellation (then Perseus)	3
Bookmasters	2
Other	3

## APPENDIX B: ADDITIONAL ORGANIZATIONAL DATA

The AAUP Operating Statistics have been collecting new data on e-publishing initiatives for several years. Although distribution of the Operating Statistics is limited to AAUP members, we are sharing data points on staffing and organizational structure to round-out the picture we get through the annual Digital Book Publishing Survey.

### **FTEs Working on Electronic Initiatives (2016)**

*62 presses provided data on pro-rated time spent by employees on electronic initiatives. Across all presses, this represents the full-time equivalent (FTE) of 179.4 employees engaged in these endeavors, with the equivalent number of employees by department as follows:*

Editorial (Acquisitions):	17.2
Editorial (Copyediting):	15.3
Production and Design :	43.9
Marketing:	42.1
Order Fulfillment:	4.4
General, Accounting, and Admin:	20.3
IT:	26.8
Other:	9.6

### **Which best describes your organizational structure for e-initiatives?**

*59 presses provided information.*

Formal department to guide these initiatives:	8
Formal committee to guide these initiatives:	13
Informal or ad hoc group to guide these initiatives:	38

The Annual Operating Statistics are prepared by Kim Schmelzinger, and overseen by the AAUP Business Systems Committee.



## APPENDIX C: ADDITIONAL OPEN ACCESS BOOK PUBLISHING DATA

In July 2016, AAUP undertook a brief survey to learn more detail about member presses' OA books initiatives.

77 presses responded, **32** of which had then published OA books (OA book publishers).

53% of OA book publishers reported that on average, subventions covered **less than half** of the costs to publish a book with an OA edition.

72% of OA book publishers **always** publish for-sale print editions of OA titles; only 3% **never** do.

37% of OA book publishers **always** publish for-sale ebook editions of OA titles; 22% **never** do.