



# Who's Reading E-Books?

*New Results from BISG's Consumer Attitudes Toward E-Book Reading*

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3<sup>rd</sup> Round Data from the Book Industry Study Group's  
On-Going Survey of Consumer Attitudes Toward E-Book Reading

## II Jornadas Técnicas ANELE 2010

*October 26, 2010  
Madrid*



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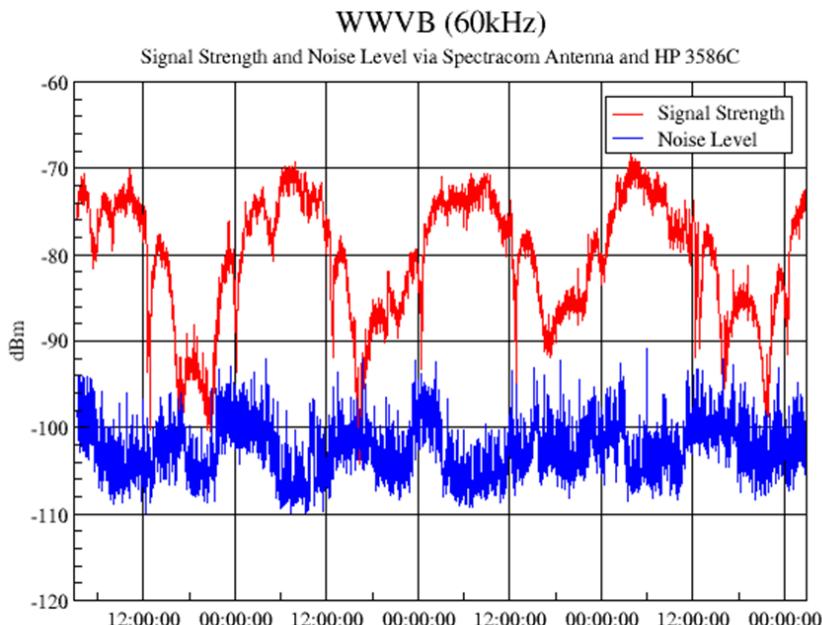
**ned,  
nt book  
or both  
oducts.**

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*BISG is committed to the development of effective industry-wide standards, best practices, research and events that enhance relationships between trading partners.*

# Improving the ratio of signal-to-noise in the book industry

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## 2 years ago (or so)...

Predictable supply chain model,  
a stable product medium, &  
healthy economy



Book by Marianne Leone - Simon & Schuster - Mozilla Firefox LogMeIn - Remote Session

Bookmarks Tools Help

http://books.simonandschuster.com/Knowing-Jesse/Marianne-Leone/9781439183922/intcmp=ibp\_bb\_t4ah&cp\_date=ibp\_bb\_t4ah\_100921

ook Indus... Knowing Jesse | Book b... Google Image Result for http://fun... On Fire for Jesus III.doc - Powered... Gmail - Inbox (19198) - kgallagher7... naia.org - The Official Site

**SIMON & SCHUSTER** Search GO AUTHORS BOOKS MULTIMEDIA COMMUNITY CATEGORIES

Books » Knowing Jesse

**Knowing Jesse**  
A Mother's Story of Grief, Grace, and Everyday Bliss

Like Be the first of your friends to like this.

By Marianne Leone

This edition: Hardcover, 272 pages

Availability: Usually ships within 2-3 days

Our Price: \$25.00

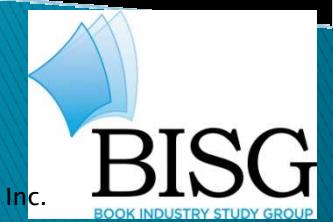
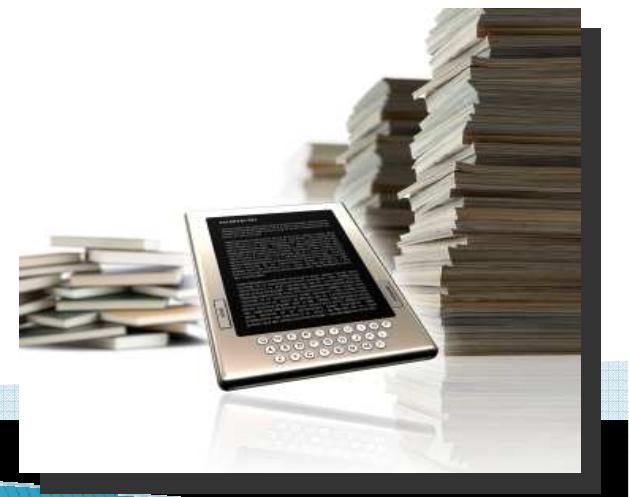
Buy Now or Buy from another online retailer

Also available in Digital: eBook

BROWSE INSIDE

Fragmenting supply chain,  
Mixing mediums,  
&  
Unstable economy

# Today...



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# Supply Chain to...

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# ...and becoming intimate with the consumer

In all phases of the publishing process.



Acquisitions

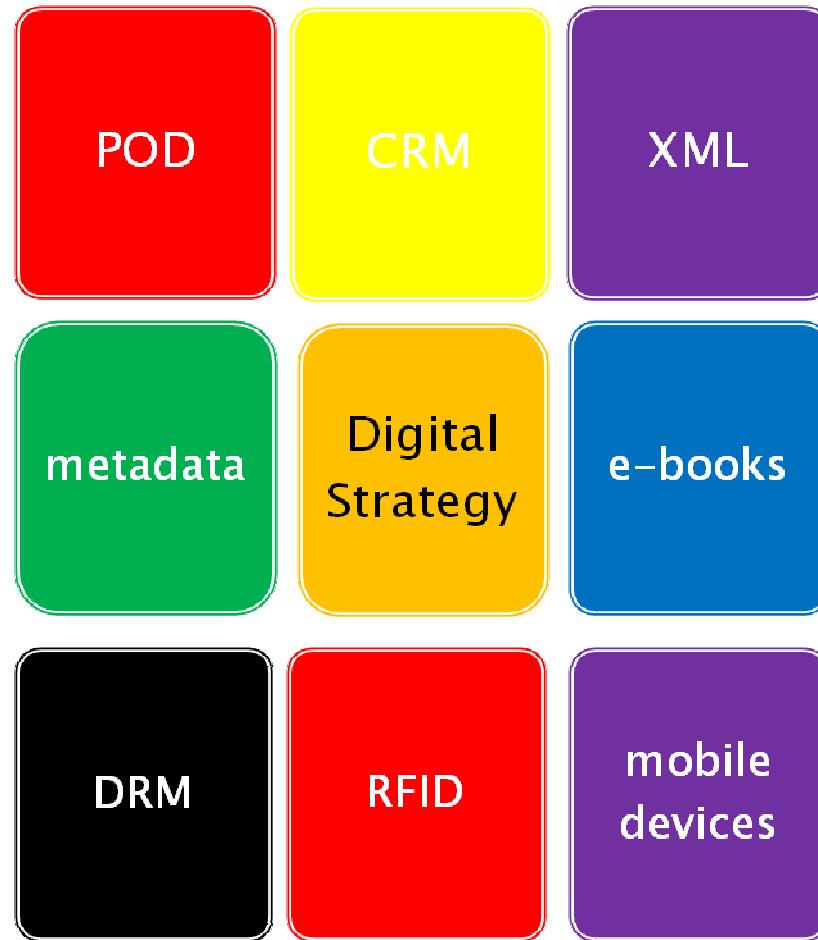


Marketing



Sales

# Tech-centric view of the cube



# The customer-centric view

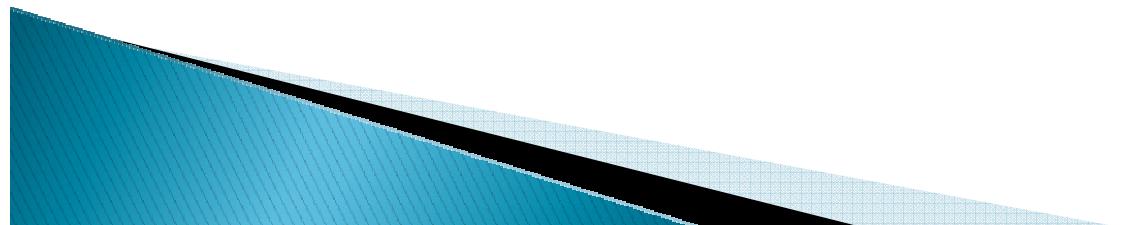




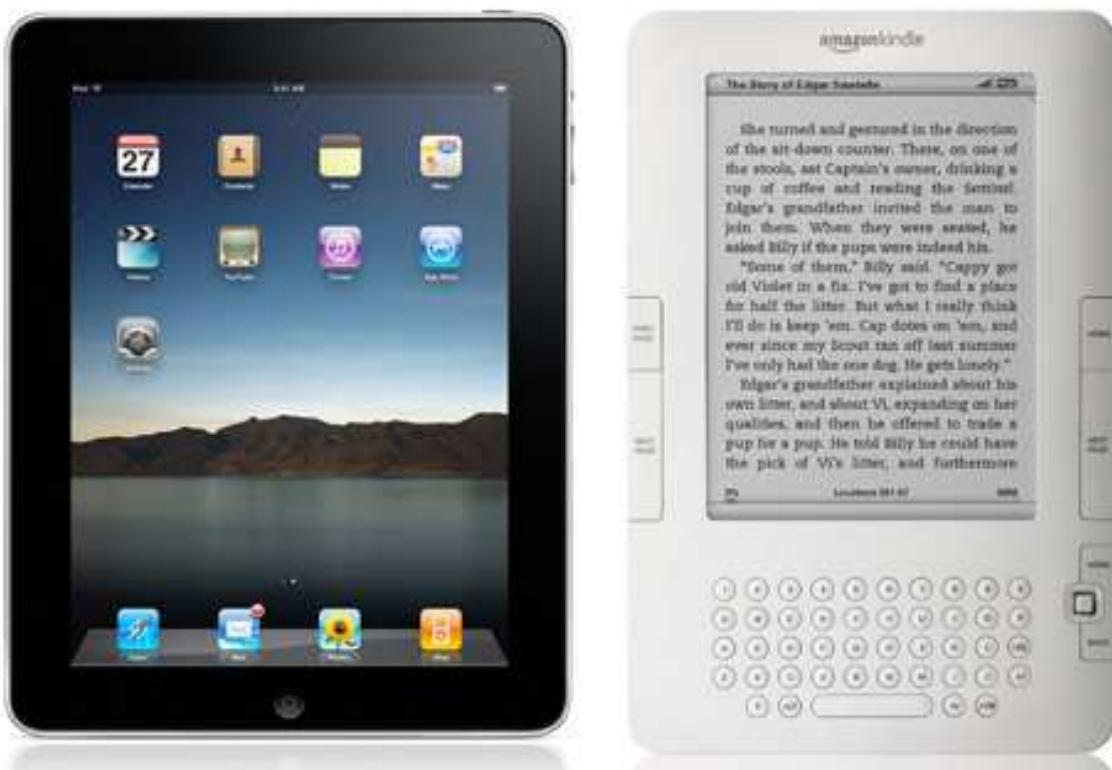
The Customer View

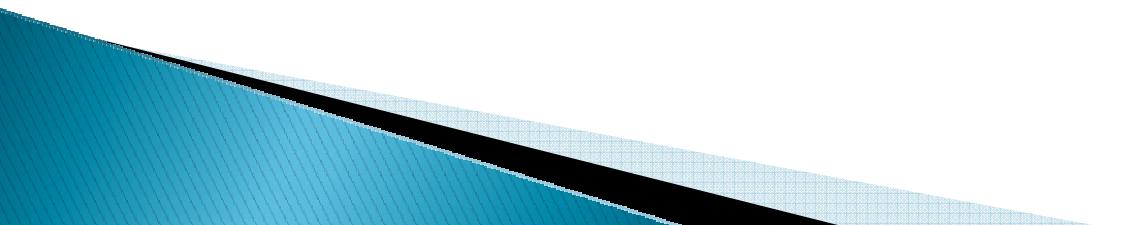
# Technologies that support customer-centric strategy

- ▶ Content architecture:
  - XML repositories
  - Taxonomy dev and management tools
- ▶ Business rule engines
- ▶ SOA
- ▶ Data warehousing
  - Data integration
  - ETL tools
- ▶ Business intelligence tools
- ▶ Tech that make processes transparent



# New Roles and core competencies in publishing today





**Data management** → **Predictive analytics** → **Relationship management**

# The Role of the Publishing Professional: A Change of Focus

## Core competencies

- ▶ Metadata management
- ▶ Compliance management
- ▶ Marketplace interpretation
- ▶ Price management
- ▶ Relationship management
- ▶ Data architecture

# The puzzle we're now solving...

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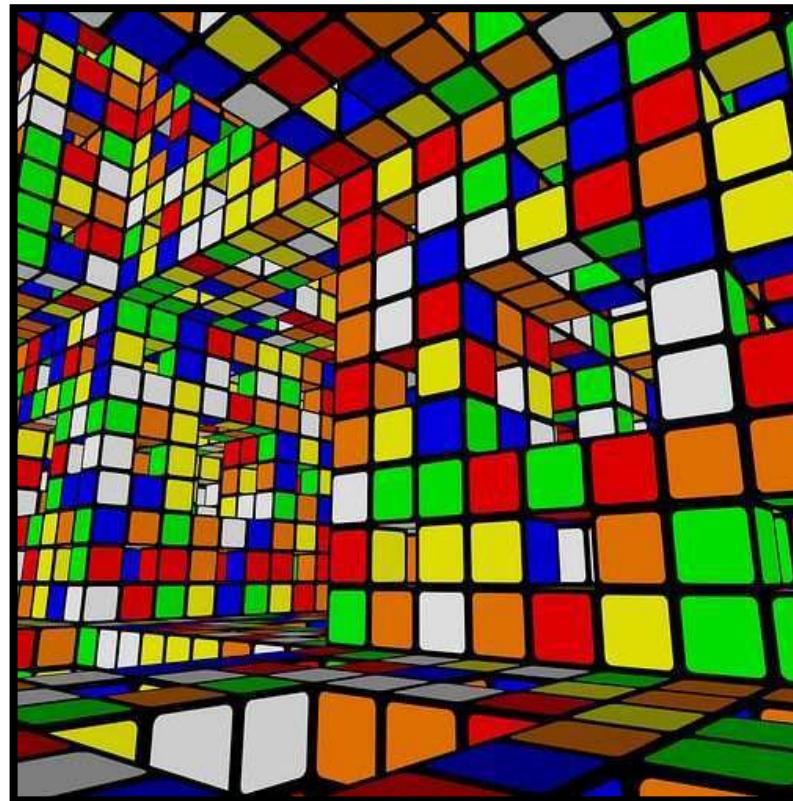


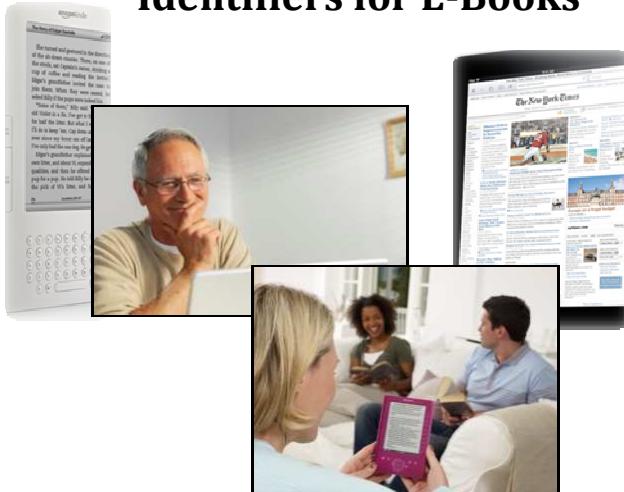
Illustration taken from:  
*The Math Book: From Pythagoras to the 57th Dimension*  
by Clifford A. Pickover, Sterling Publishing

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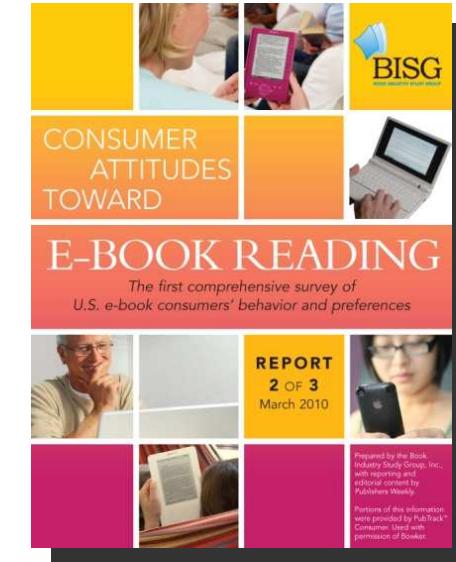


# A closer look at key BISG initiatives

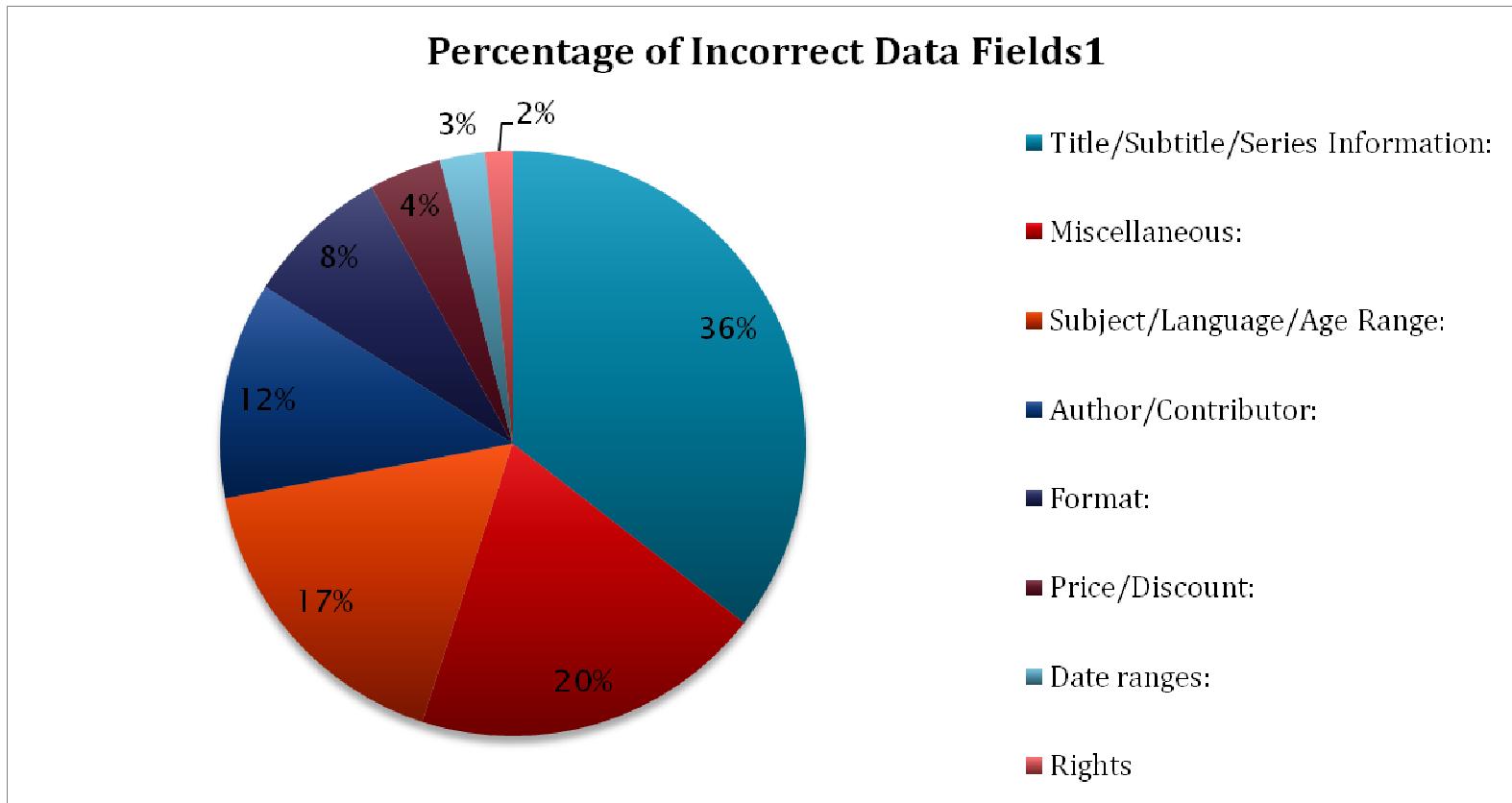
## Identifiers for E-Books



## Sales reporting for digital and print products



# Scorecard for Product Data



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# New in 2010: Levels of Certification

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**GOLD**: **98%** quantitative score; **95%** qualitative

**SILVER**: **90%** quantitative score; **90%** qualitative

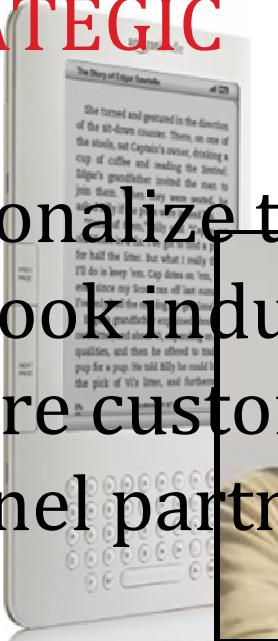
**BRONZE**: **80%** quantitative score; **75%** qualitative

*Plus extra credit for using certain  
marketing data points and/or ONIX 3.0.*

STRATEGIC

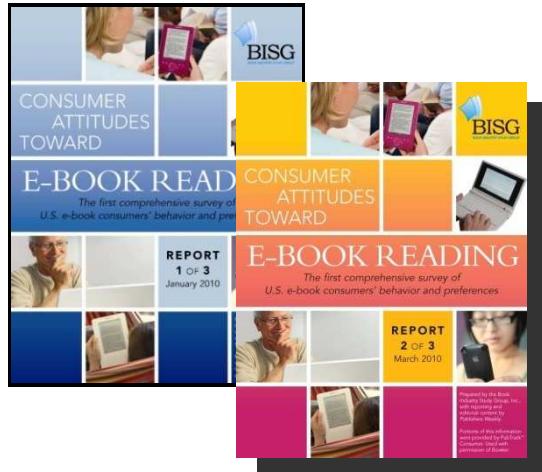
## Identifiers for E-Books

“Rationalize the implementation of identifiers in the book industry, and drive customer value (where customers are defined as publishers, channel partners, authors and readers).

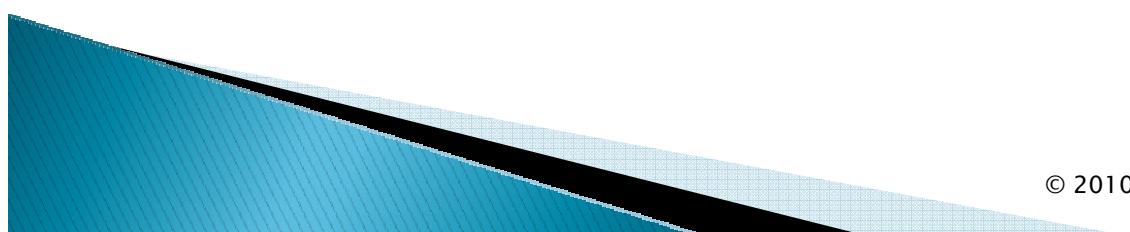


Promote understanding of this complex landscape and stimulate discussion that leads to action.”

*—Identification Committee*

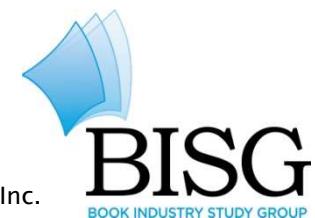


# Who's Reading E-Books?



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The image displays three versions of the BISG report cover for 'Consumer Attitudes Toward E-Book Reading'. The first version is blue, the second is orange, and the third is black. Each cover features a grid of images showing people using e-books and tablets. The text on the covers includes 'CONSUMER ATTITUDES TOWARD E-BOOK READING', 'The first comprehensive survey of U.S. e-book consumers' behavior and preferences', 'REPORT 1 OF 3 January 2010', 'REPORT 2 OF 3 March 2010', and 'Report 3 of 3 JULY 2010'. The BISG logo is in the top right corner of each cover.

[www.bisg.org](http://www.bisg.org)

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# Today's Talking Points

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- ▶ What we did
  - Developing the project
- ▶ Why we did it
- ▶ What we found
  - High level results from the 3<sup>rd</sup> survey fielding
- ▶ What we will do
  - The future of this data



**Now that e-books are in the mix, are book consumers acquiring more, less or the same number of print books?**

**Does DRM effect a consumers decision to acquire an e-book?**

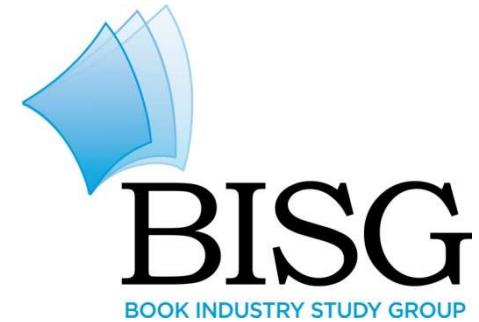
**What are the most popular e-book genres?**

**How long are book consumers willing to wait for an e-book by their favorite author?**

**How long have print book consumers been reading e-books?**

**What influences a book consumer to switch to e-books?**

**Which e-reading devices do book consumers currently own?**



# What we did

# Data Collection

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- ▶ Collaboration within the BISG Research Committee
- ▶ Using PubTrack™ Consumer's panel of U.S. book buying men, women and teens
- ▶ Survey pool of ~40 – 44K book consumers at the time of the fieldings
  - 95% confidence level

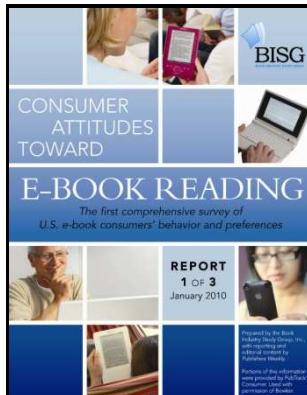
# Availability

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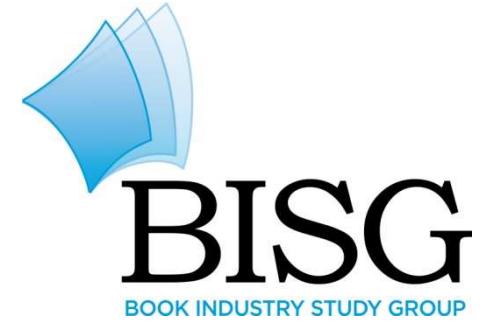
## ▶ Online Access

- Real-Time Reporting
  - Three weeks after each survey fielding
- Real-Time Reporting BUNDLE



## ▶ PDF Summary Reports

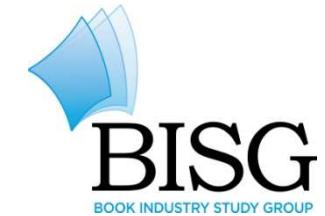
- One-Time Survey Report (PDF)
  - January 2010 and March 2010
- Final Survey Report (PDF)
  - July 2010
- Survey Report BUNDLE



# Why we did it



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28

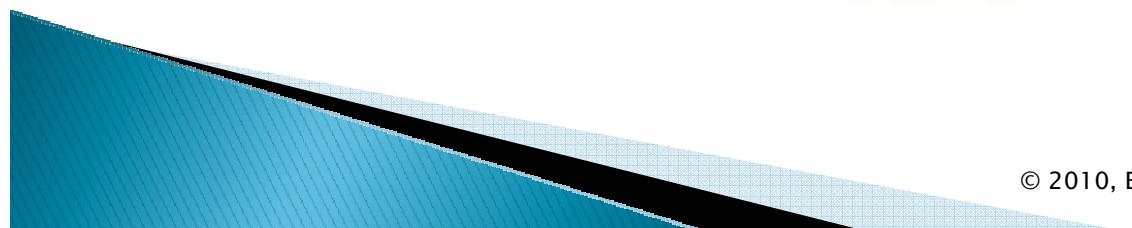




© 2010, Bowker PubTrack™ Consumer  
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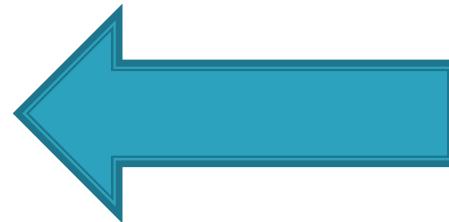
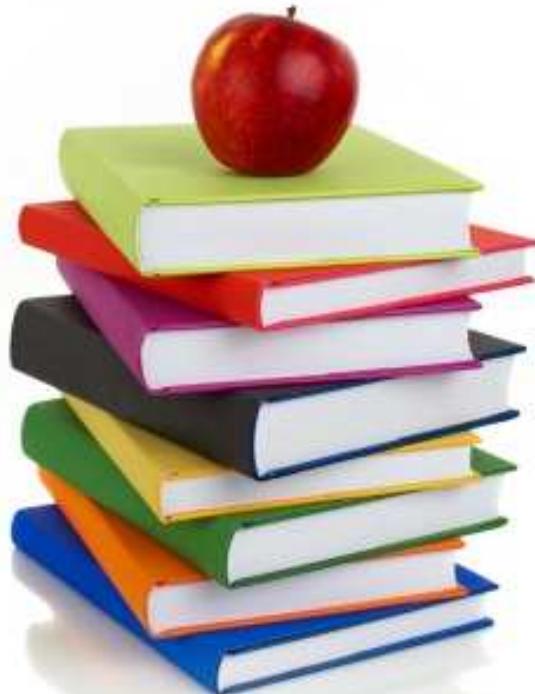


# Proliferation of choice and access to content



# New model book demand chain

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The Consumer has become King or Queen!  
Consumers define the marketplace

# Living in a 24/7/365 supply chain

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# Surviving the Digital Tipping Point

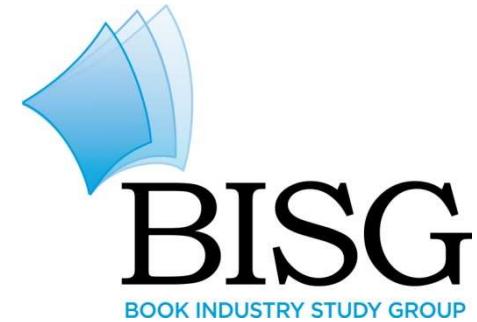


+ \$6.25



Today--  
E-books  
= <10%

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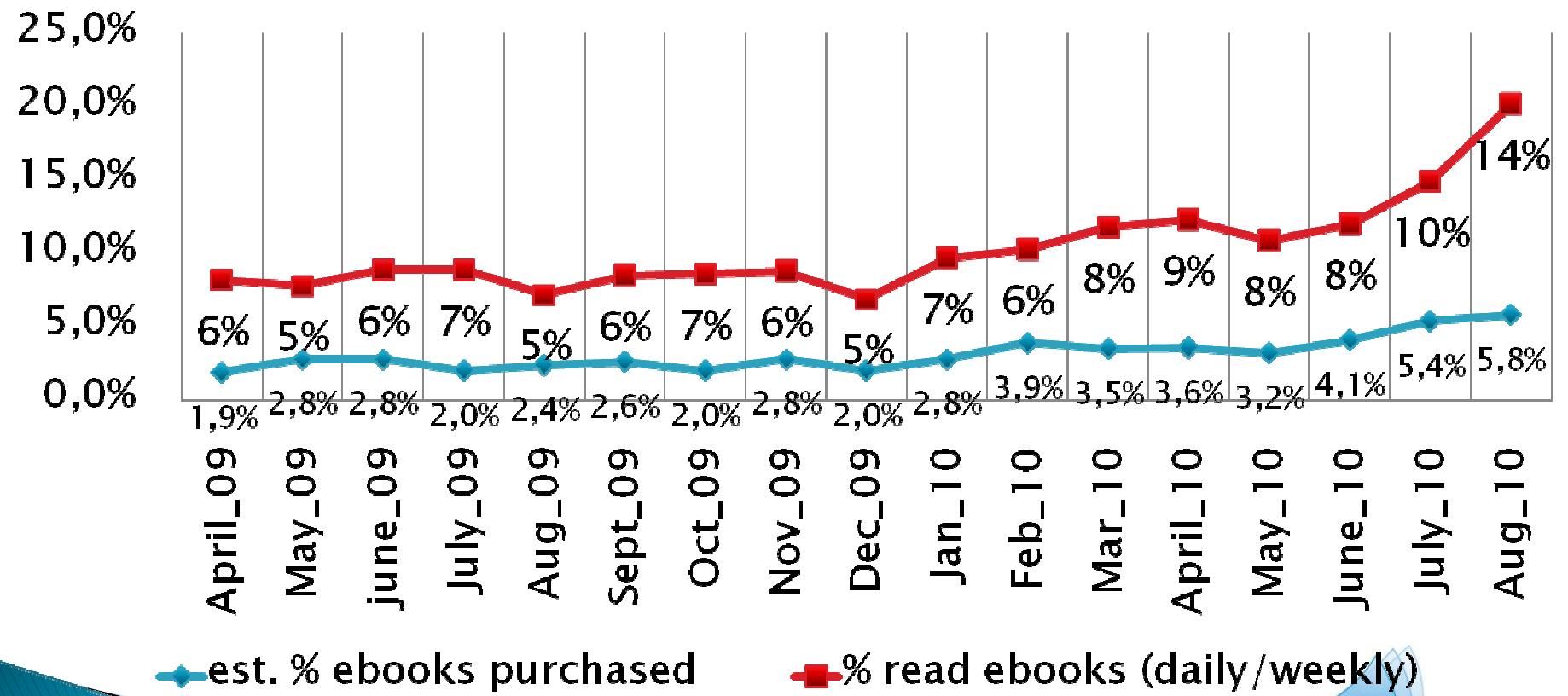


# What we found

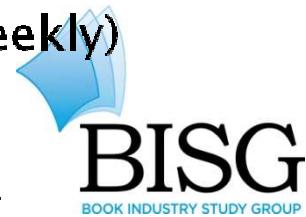
## Demographics

# Key eBooks Trends

April 2009 to August 2010



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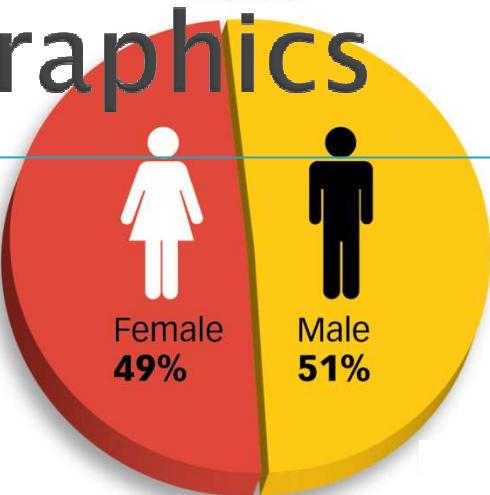


# Demographics

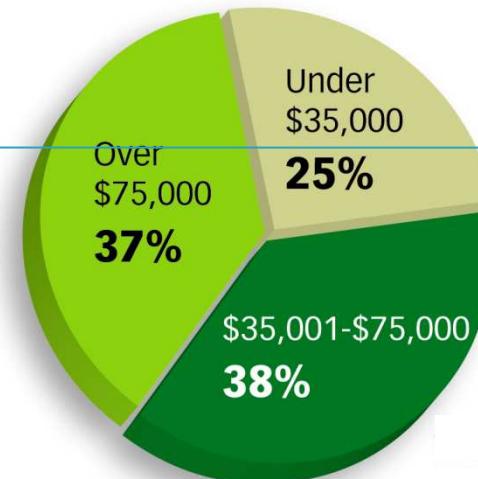
1st Fielding...

(Nov 2009)

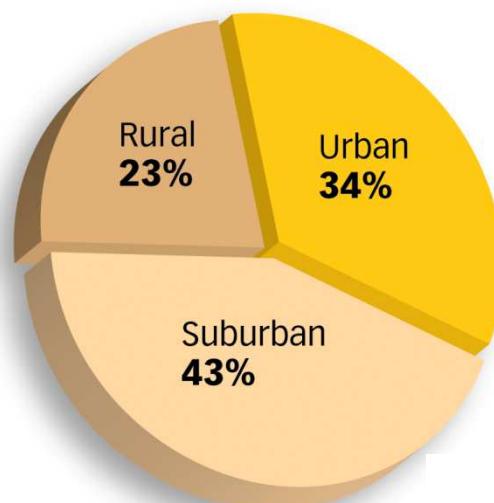
Gender



Income Level

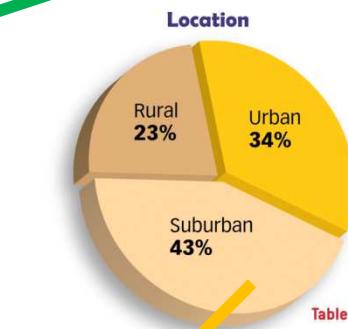
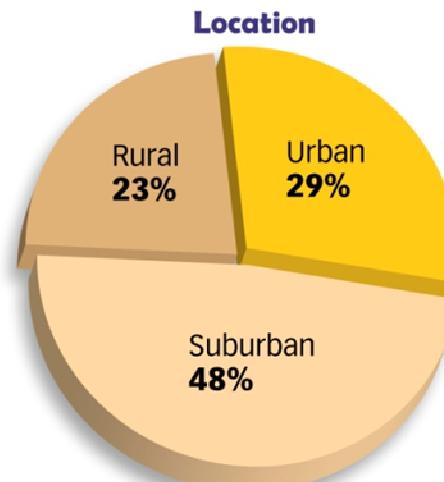
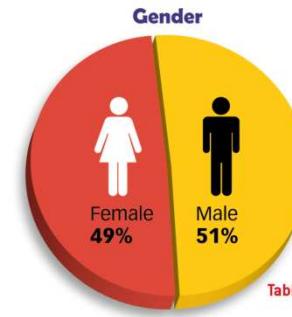


Location



1<sup>st</sup> Fielding...  
(Nov 2009)

...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)



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# What we found

## Purchase Behaviors

1st Fielding...  
(Nov 2009)

# Why consumers purchase e-books instead of print books

Top characteristics why consumers purchase an e-book rather than print book

Affordability **2.70**

Easy to download **2.65**

Readability **2.57**

Instant access to books **2.50**

Portability **2.46**

Searchability **2.19**

Environmentally friendly **2.19**

1 2 3

Ranked by mean source on a scale from 1 to 3 where 1 = not important and 3 = very important.

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## 1<sup>st</sup> Fielding...

(Nov 2009)

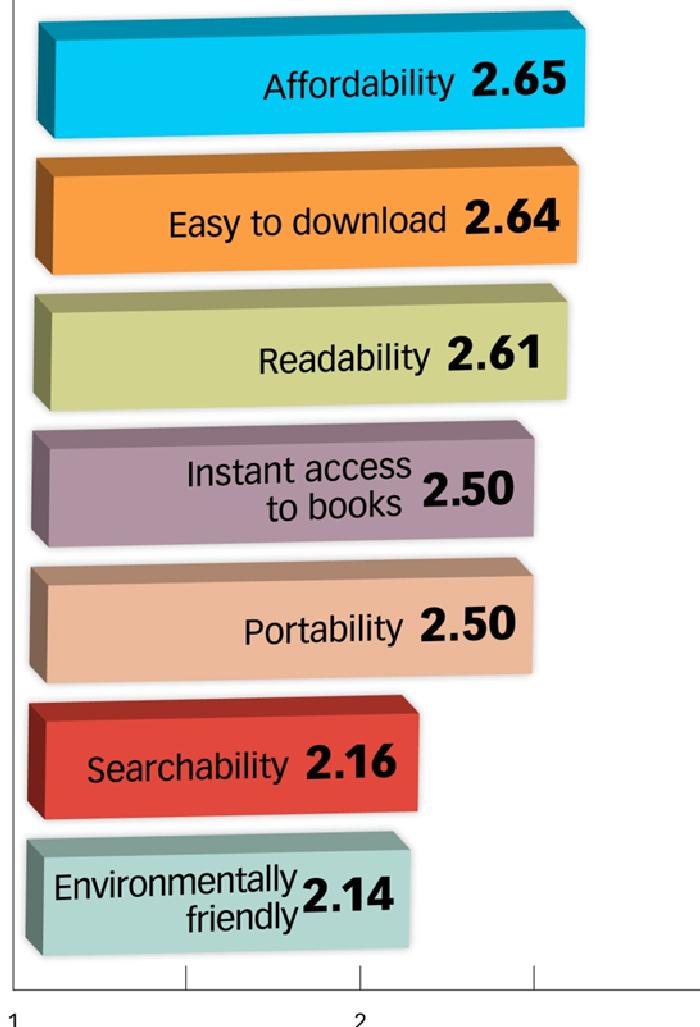
Top characteristics why consumers purchase an e-book rather than print book



Ranked by mean source on a scale from 1 to 3 where 1 = not important and 3 = very important.

...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

Top characteristics why consumers purchase an e-book rather than print book



Ranked by mean source on a scale from 1 to 3 where 1 = not important and 3 = very important.

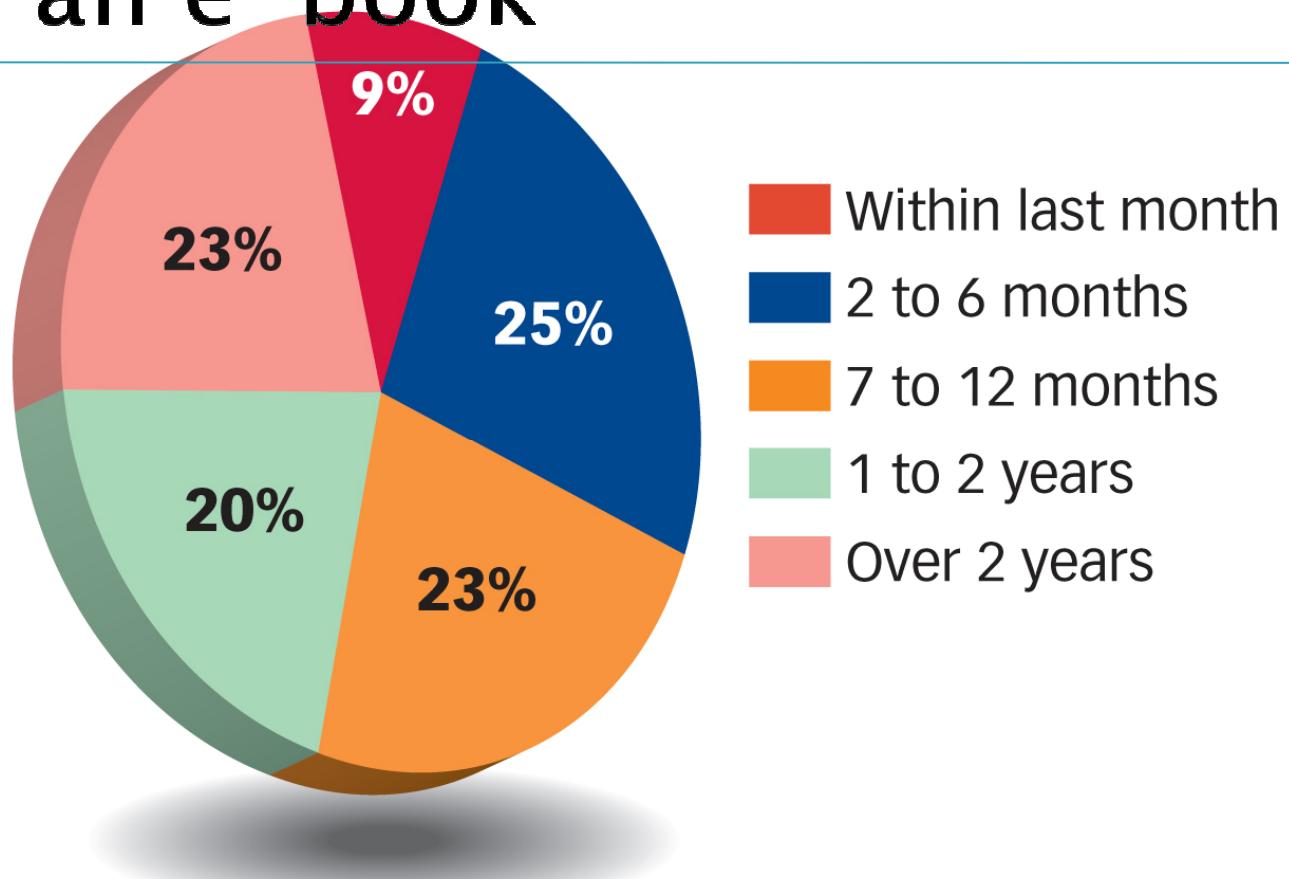
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Table 5

1st Fielding...  
(Nov 2009)

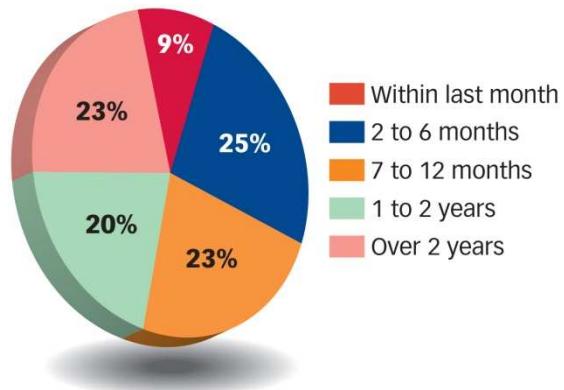
# When consumers 1<sup>st</sup> acquired an e-book



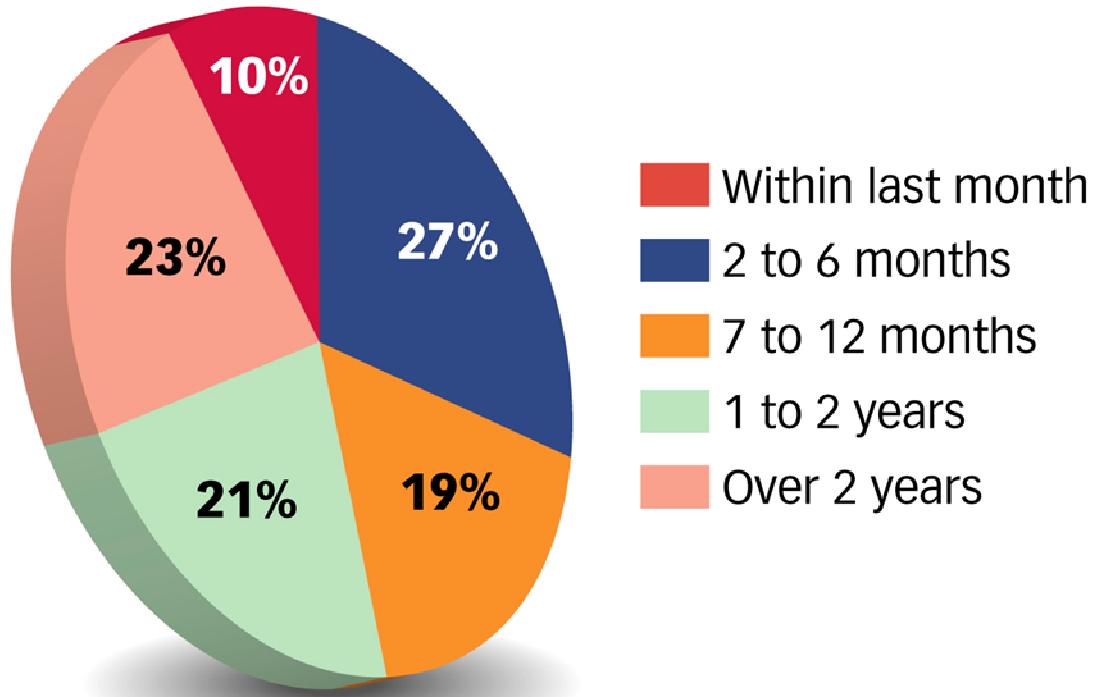
## 1<sup>st</sup> Fielding...

(Nov 2009)

### When first e-book was acquired



## When first e-book was acquired



...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

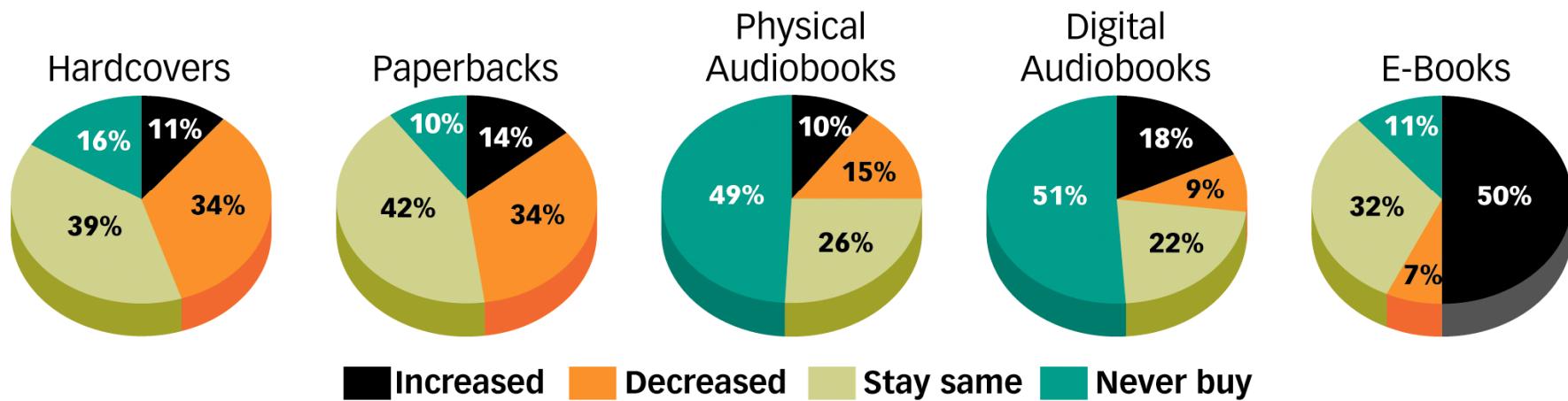
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1<sup>st</sup> Fielding...  
(Nov 2009)

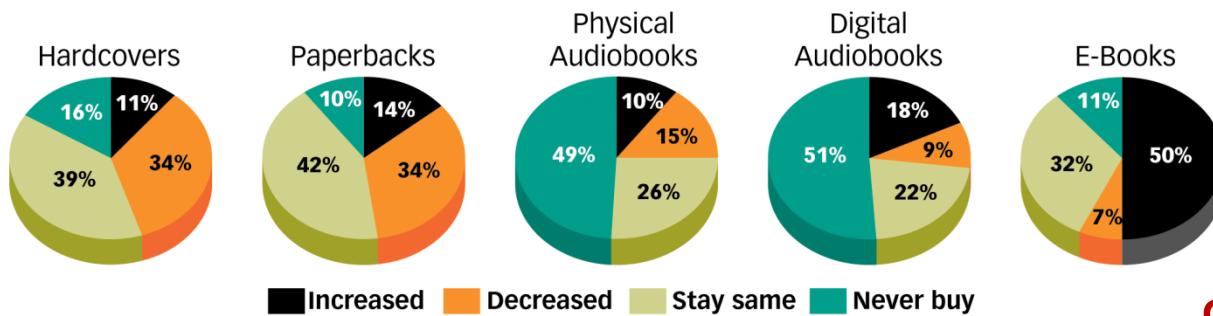
# How consumer acquisition habits have changed in the past year

## Change in consumers' acquisition habits of formats in past year



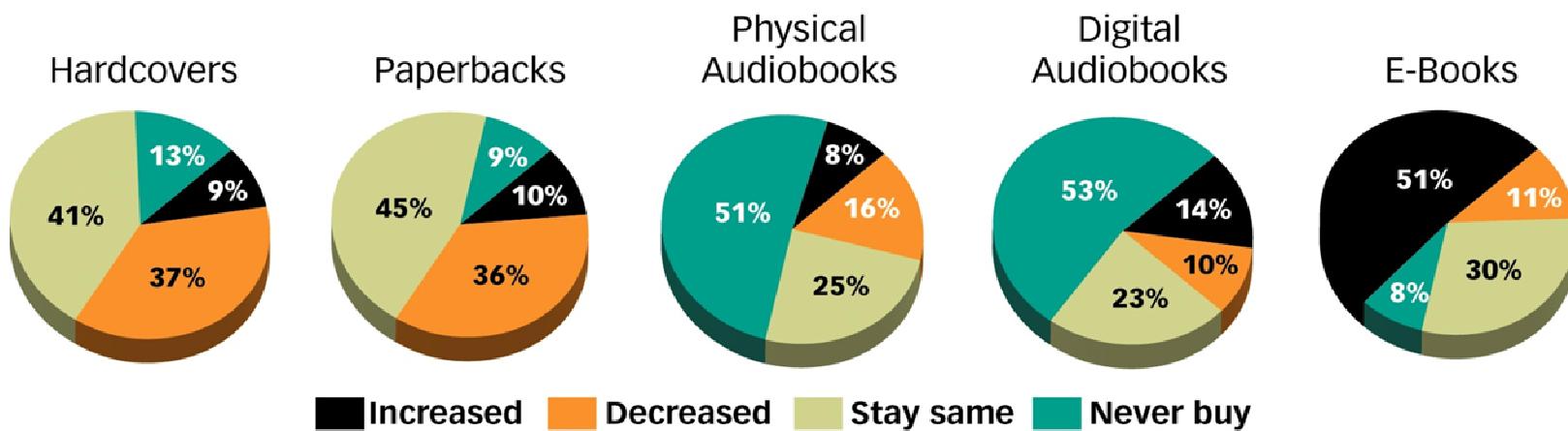
1<sup>st</sup> Fielding...  
(Nov 2009)

### Change in consumers' acquisition habits of formats in past year



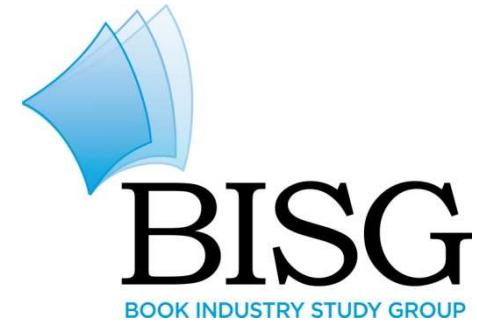
...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

### Change in consumers' acquisition habits of formats in past year



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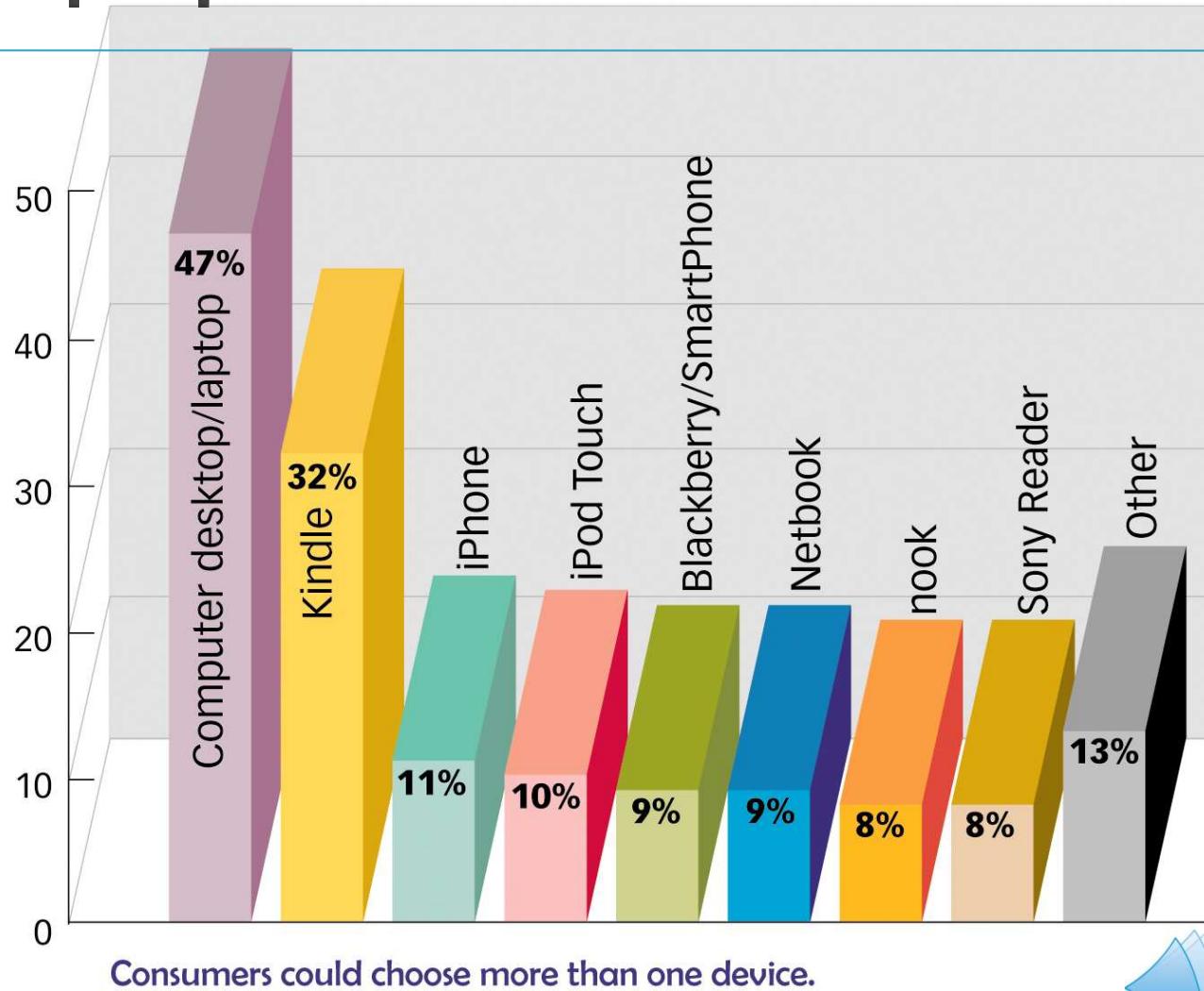
# What we found

## Purchase Preferences

1<sup>st</sup> Fielding...

(Nov 2009)

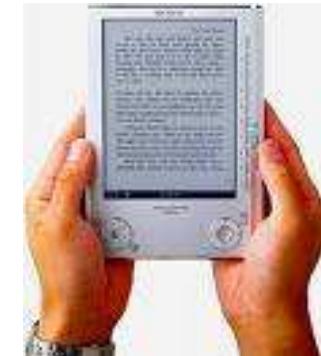
# Most popular devices used to read e-books



Consumers could choose more than one device.

# The crowded E-Device market today

One Device used most frequently



**Any Computer**  
37% - 11%

**Kindle**  
32% - 10%

**i-Phone/  
i-touch**  
10%

**Sony Reader**  
9% - 4%



**Mobile**  
4%

**B&N Nook**  
3% - NEW

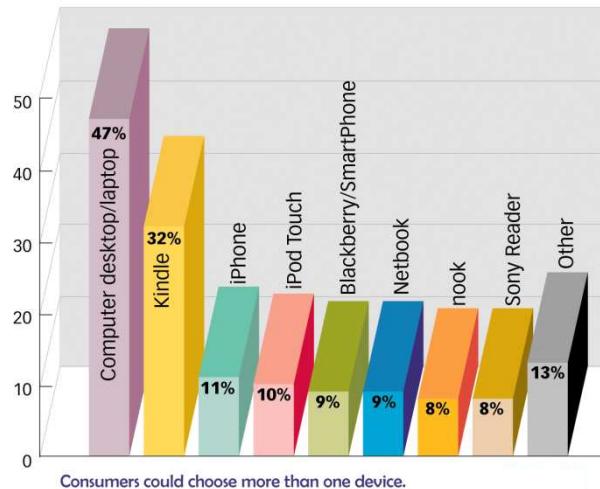
**i-Pad**  
3% - NEW

**Netbook/Tablet**  
2% - NEW

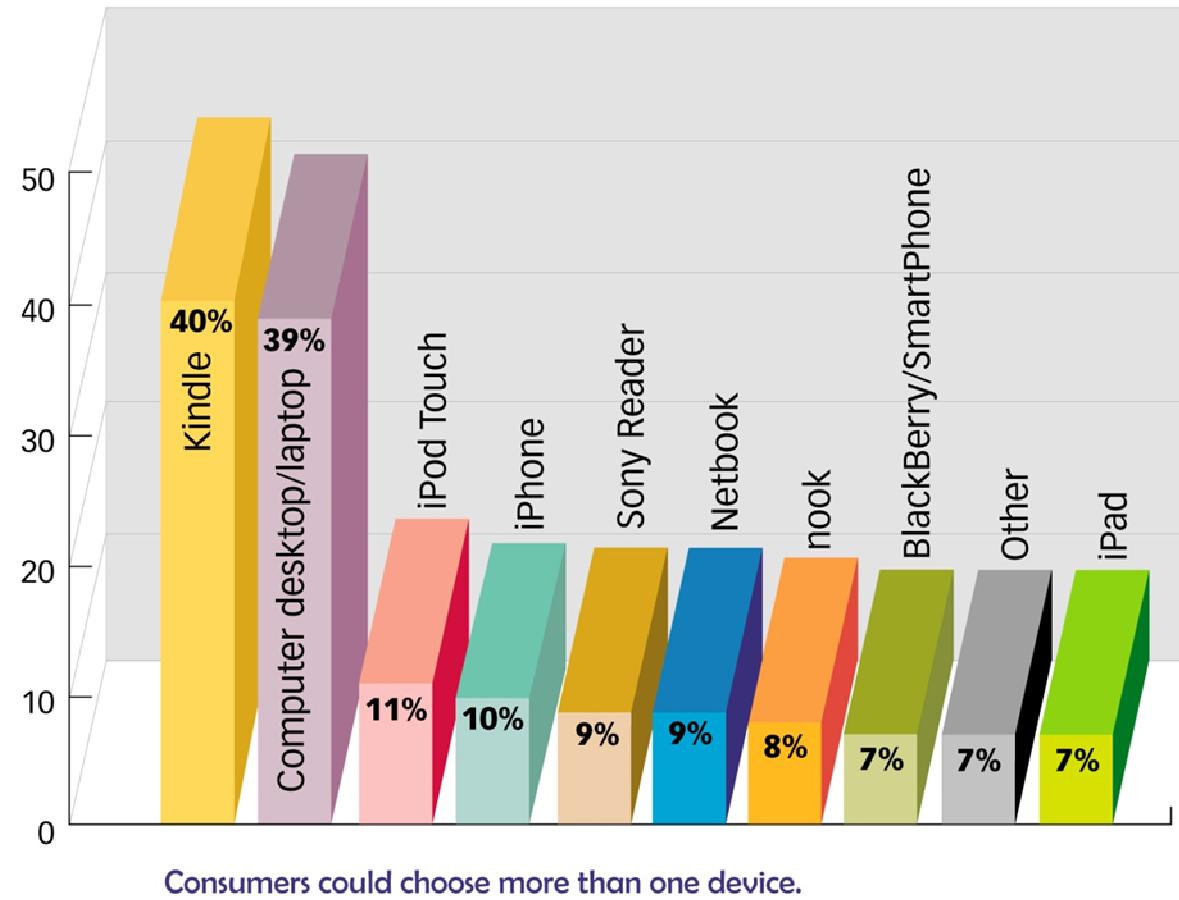
# 1<sup>st</sup> Fielding...

(Nov 2009)

## Most popular devices used to read e-books



## Most popular devices used to read e-books



...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

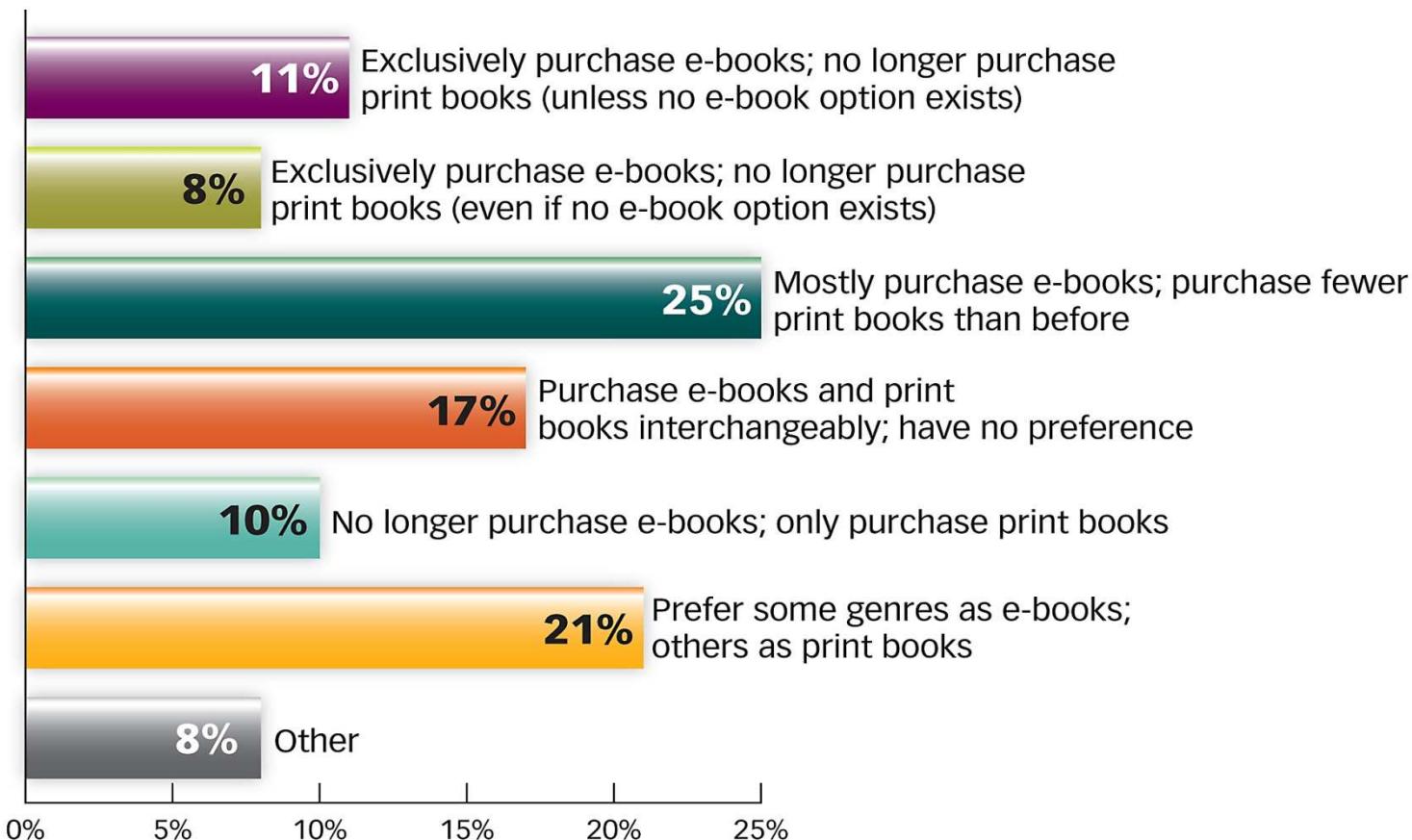
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1st Fielding...

(Nov 2009)

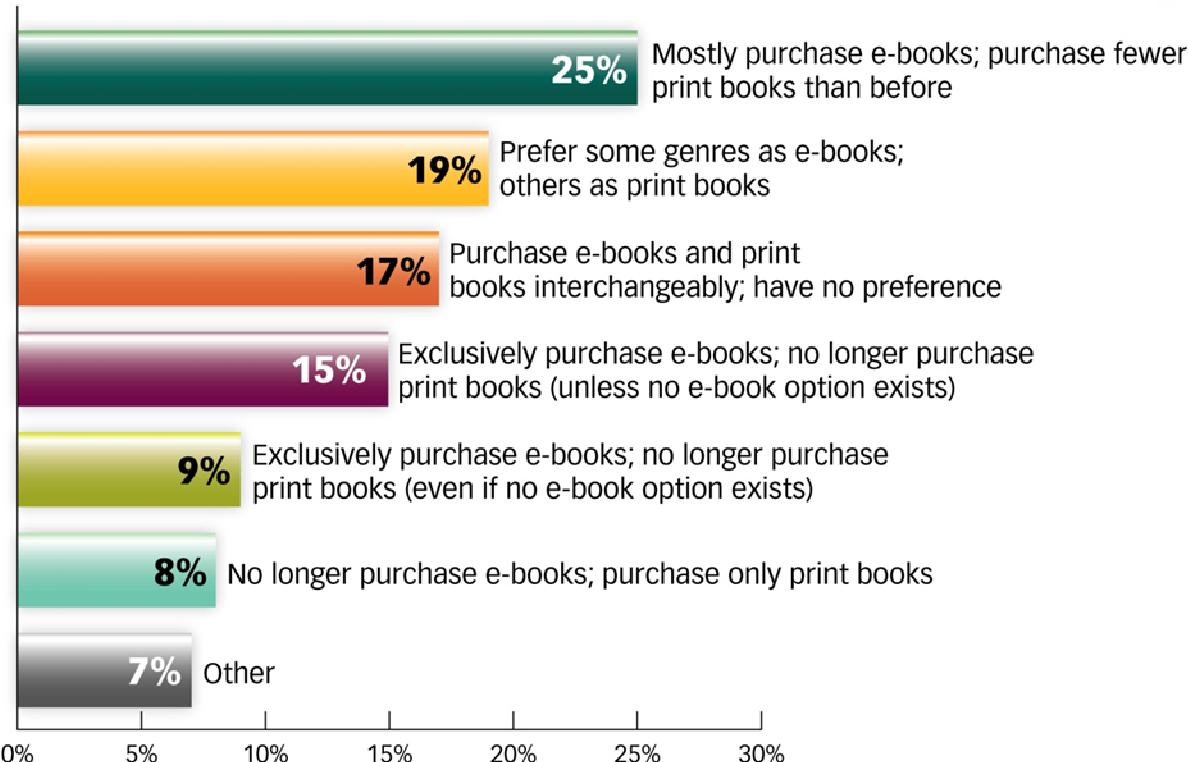
# Changes in purchasing habits

Changes in purchasing habits of consumers  
since they started acquiring e-books

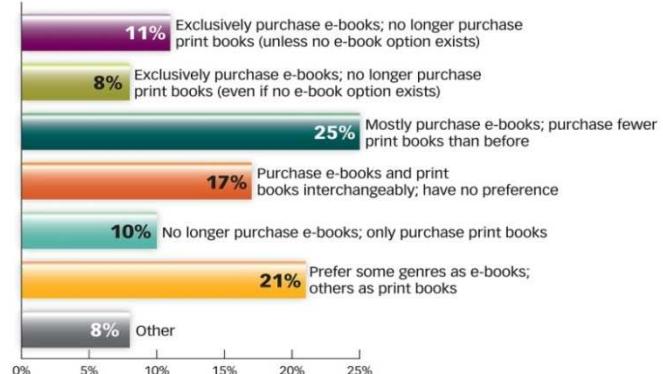


## 1st Fielding... (Nov 2009)

### Changes in purchasing habits of consumers since they started acquiring e-books



### Changes in purchasing habits of consumers since they started acquiring e-books



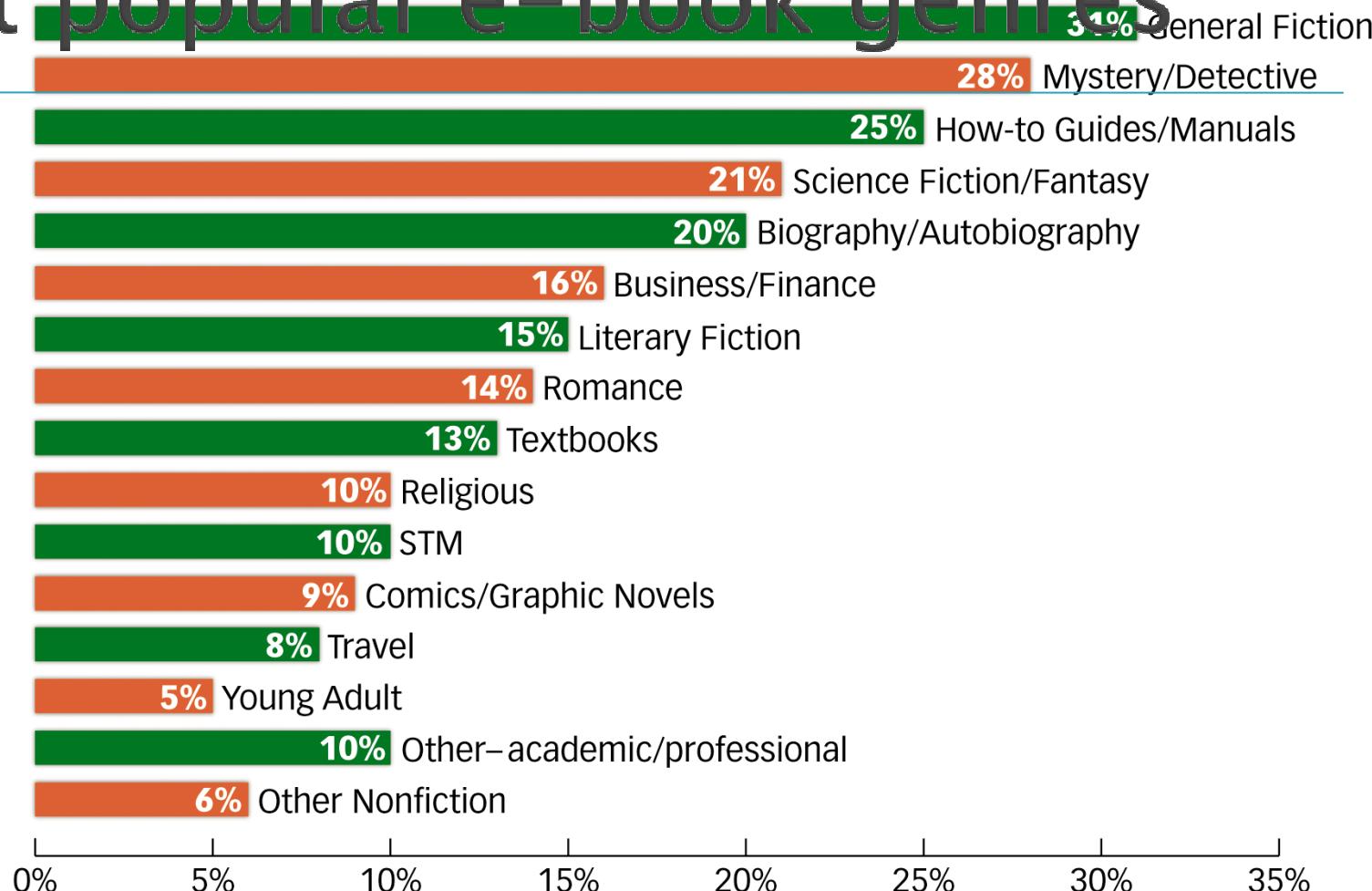
...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

1<sup>st</sup> Fielding...

(Nov 2009)

# Most popular e-book genres

Most popular genres consumers prefer to read as e-books

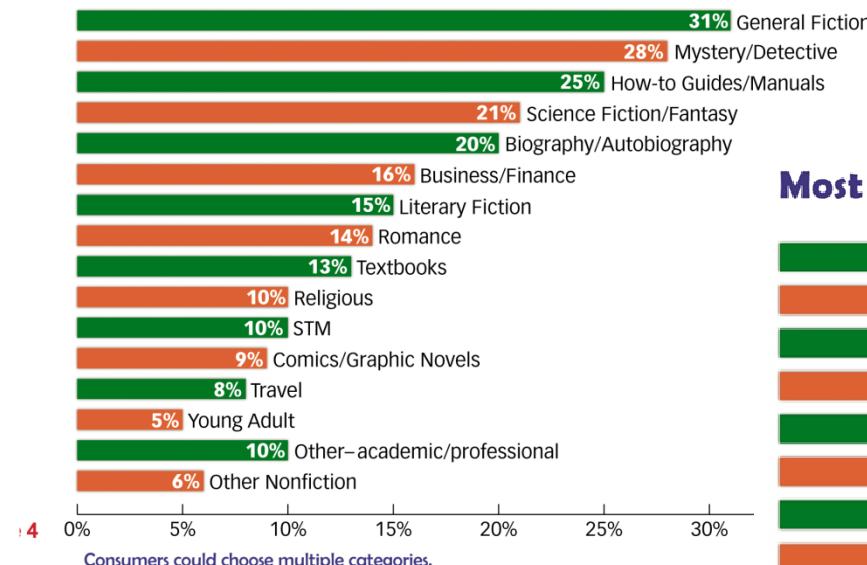


Consumers could choose multiple categories.

# 1<sup>st</sup> Fielding...

(Nov 2009)

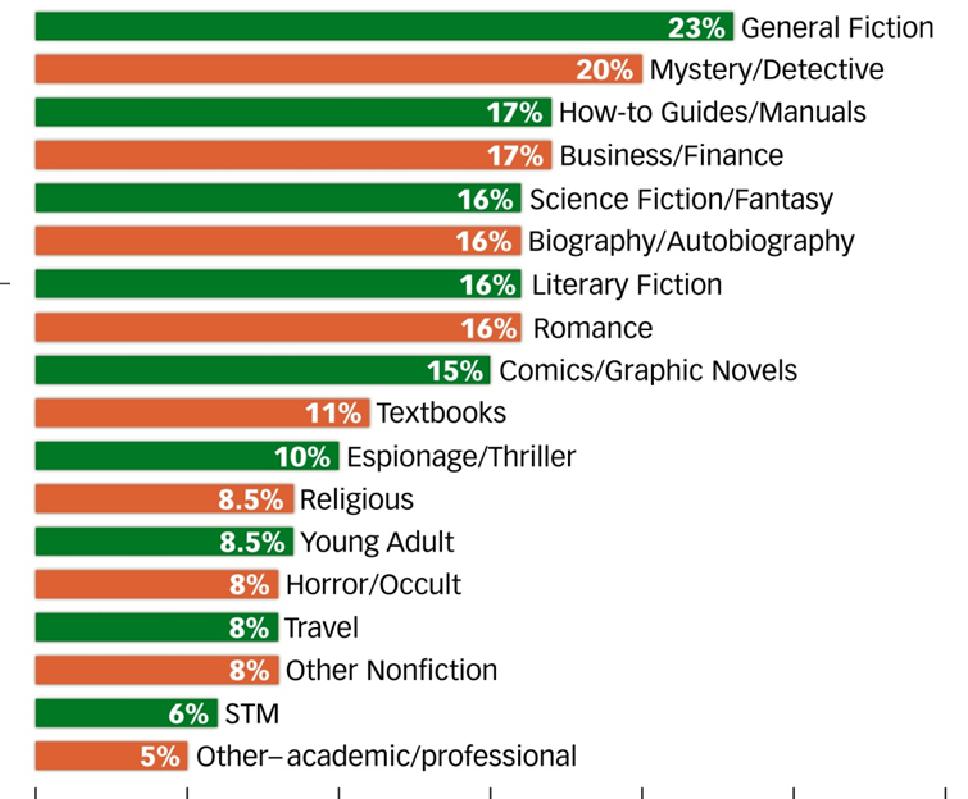
## Most popular genres consumers prefer to read as e-books



14

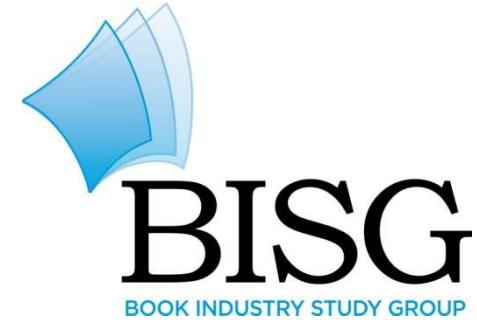
Consumers could choose multiple categories.

## Most popular genres consumers prefer to read as e-books



Consumers could choose multiple categories.

...compared  
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(April 2010)



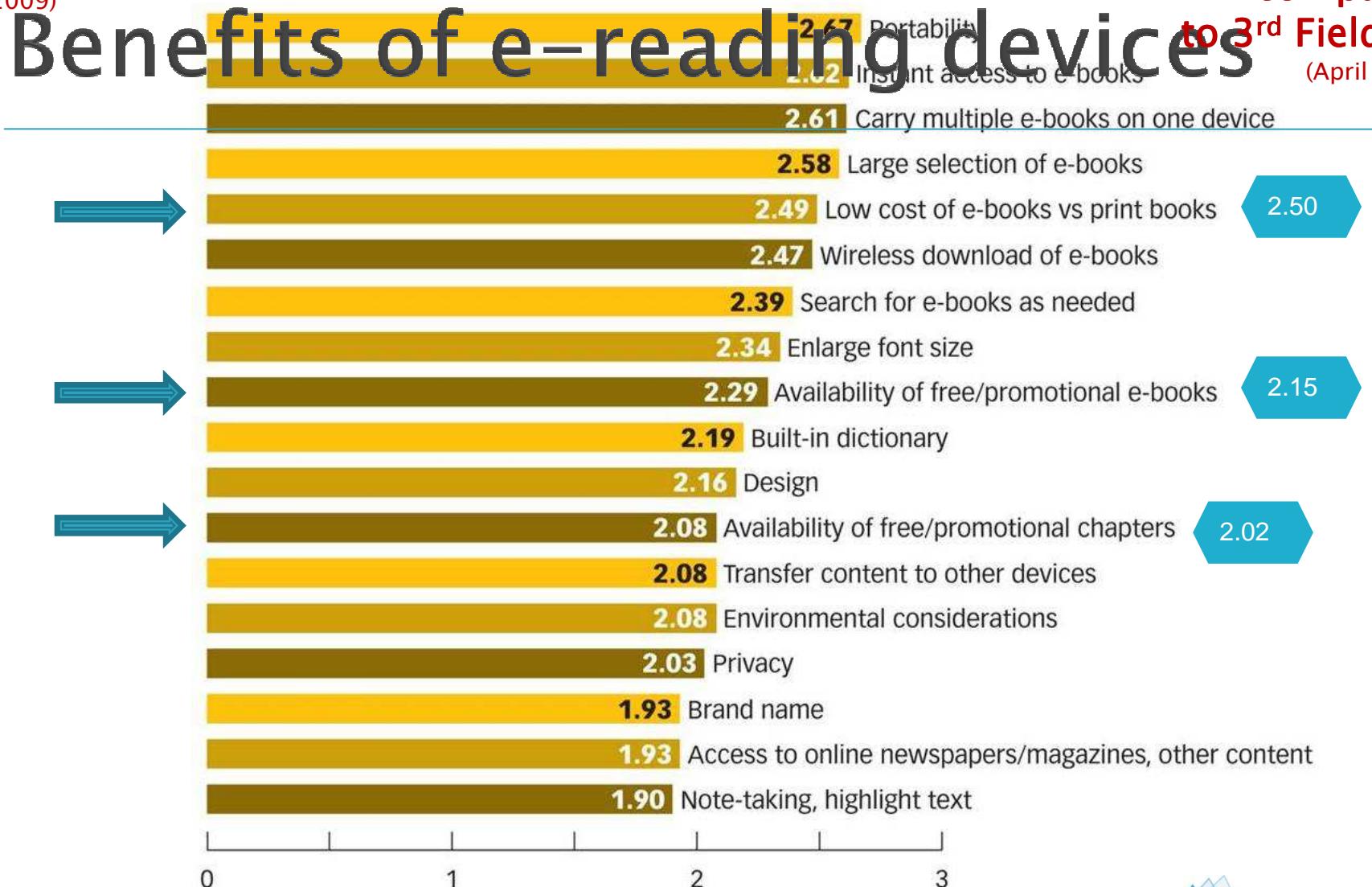
# What we found

## Purchase Perceptions

1<sup>st</sup> Fielding...  
(Nov 2009)

## Benefits of e-readers

...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)



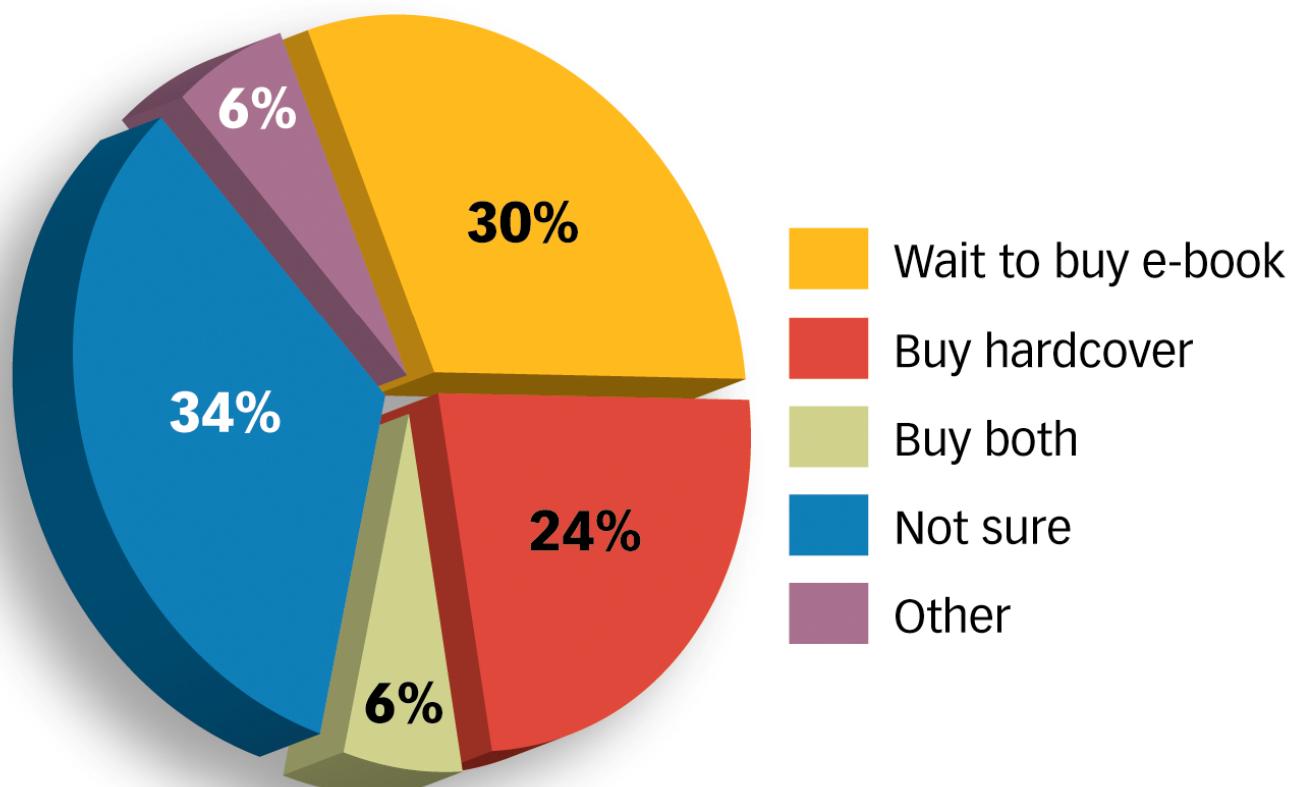
Ranked by mean source on a scale from 0 to 3 where 0 = no benefit and 3 = high benefit.

1<sup>st</sup> Fielding...

(Nov 2009)

# How long consumers would wait to buy an e-book by their favorite author

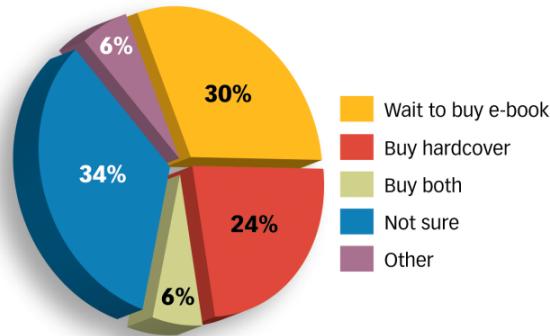
Percentage of consumers willing to wait three months to buy e-book rather than immediately buy print book



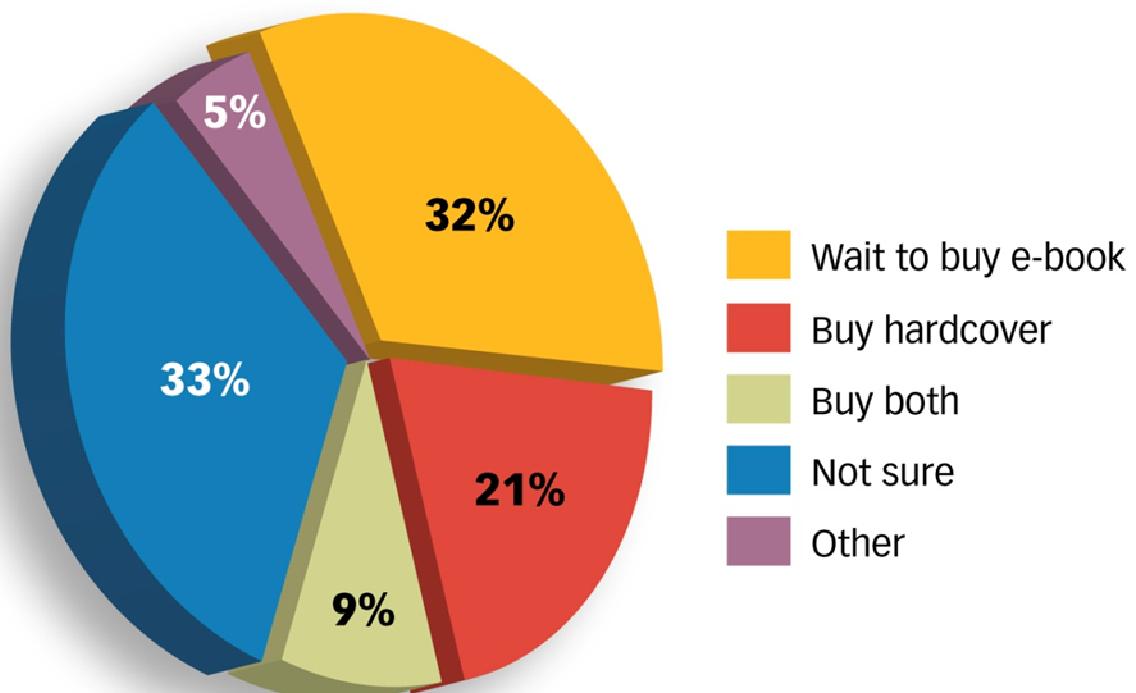
## 1<sup>st</sup> Fielding...

(Nov 2009)

Percentage of consumers willing to wait three months to buy e-book rather than immediately buy print book



## Percentage of consumers willing to wait three months to buy e-book rather than immediately buy print book



...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

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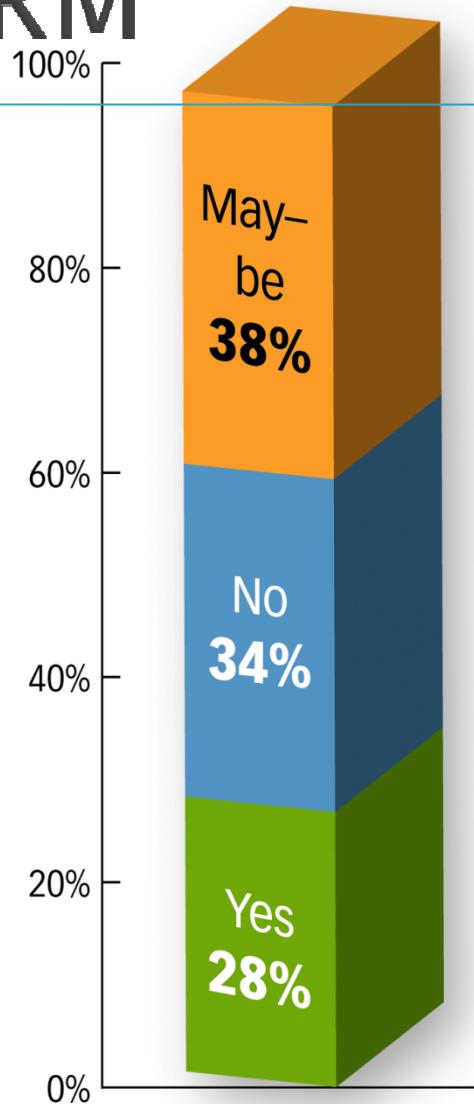
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1<sup>st</sup> Fielding...

(Nov 2009)

# The effect of DRM

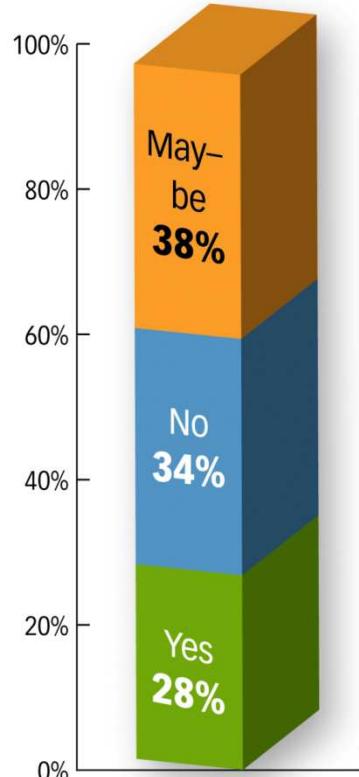
Does DRM affect consumers' decision to purchase an e-book?



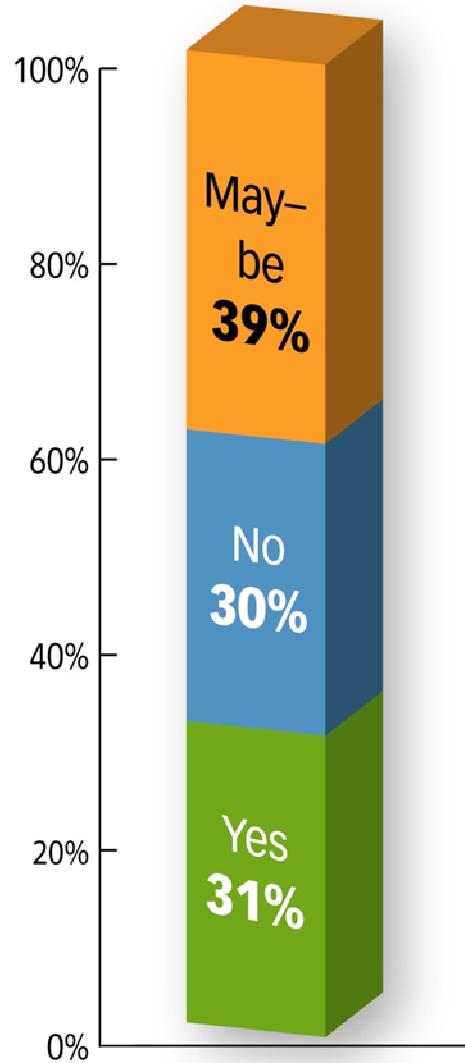
## 1<sup>st</sup> Fielding...

(Nov 2009)

Does DRM affect consumers' decision to purchase an e-book?

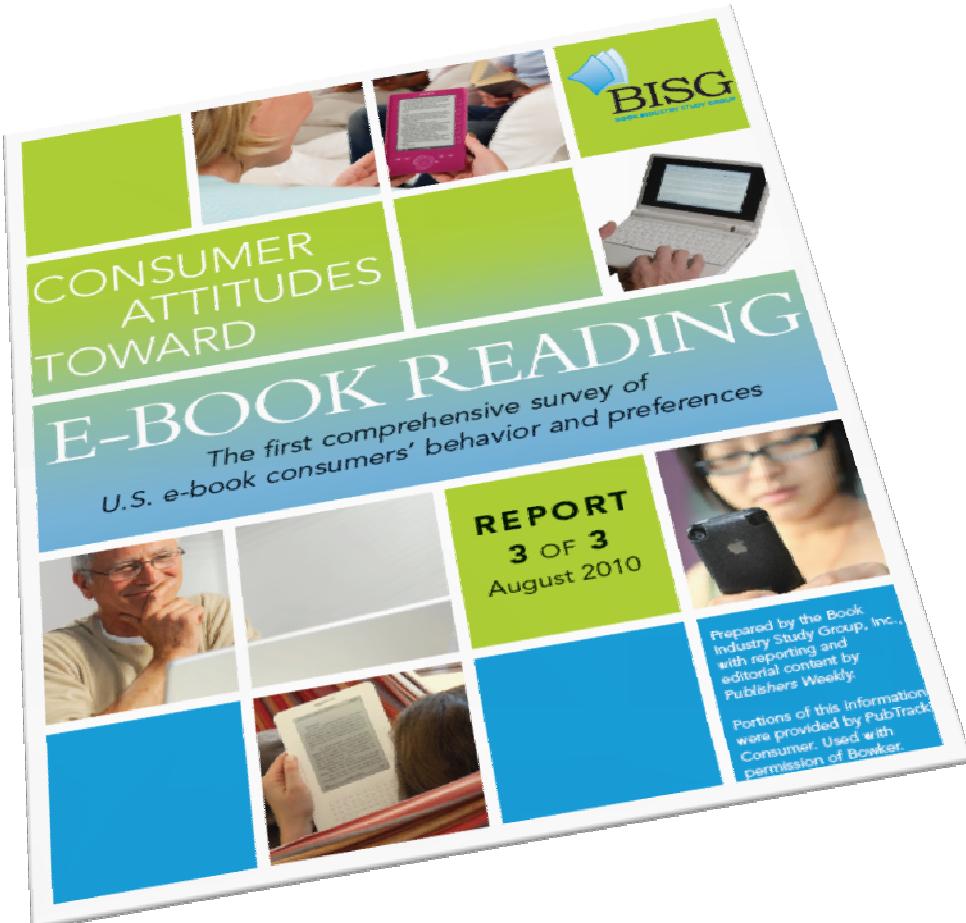


Does DRM affect consumers' decision to purchase an e-book?

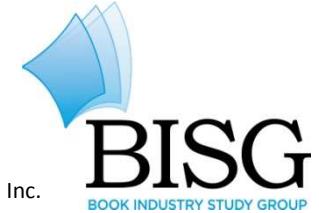


...compared  
to 3<sup>rd</sup> Fielding  
(April 2010)

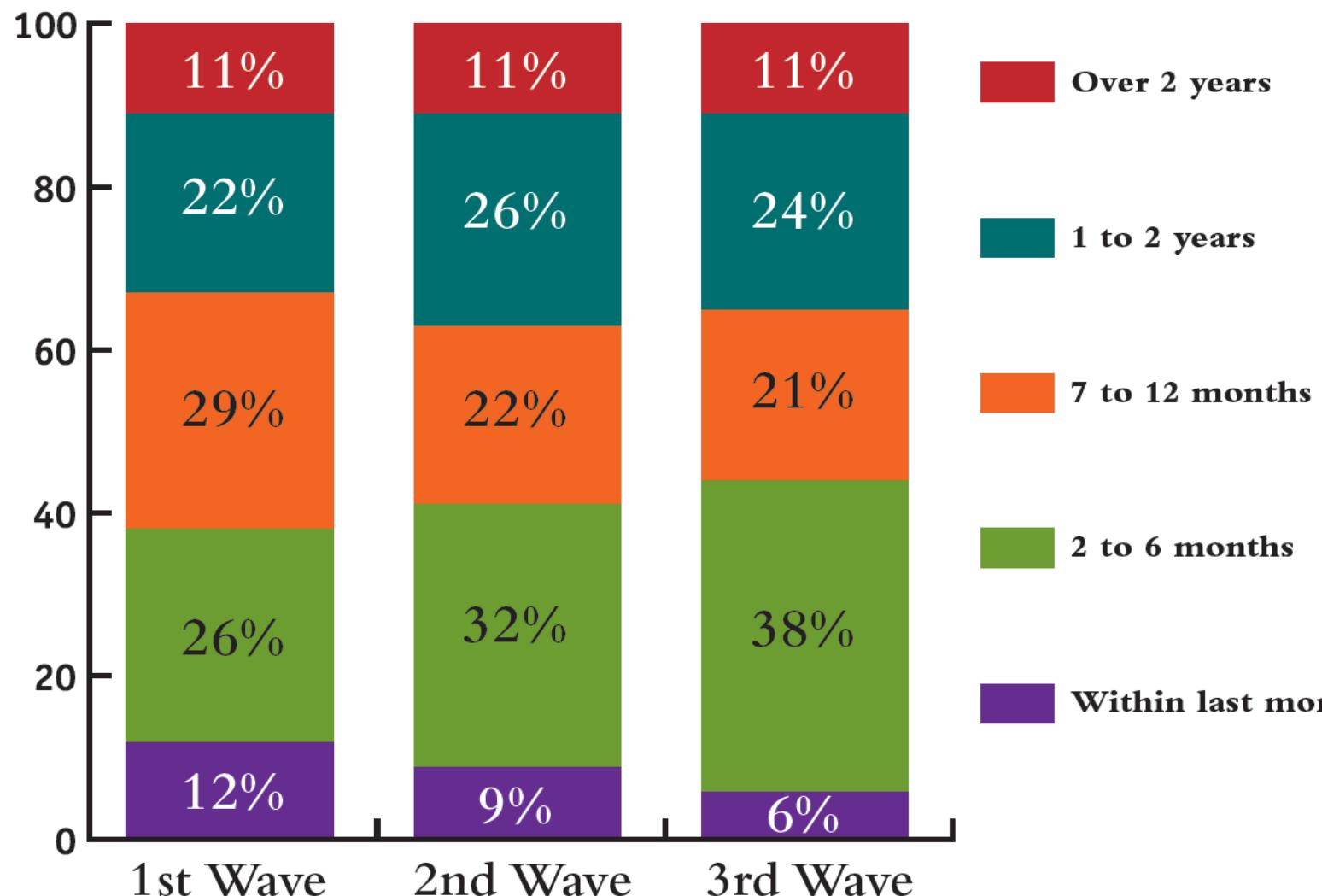
# More on eReader Devices



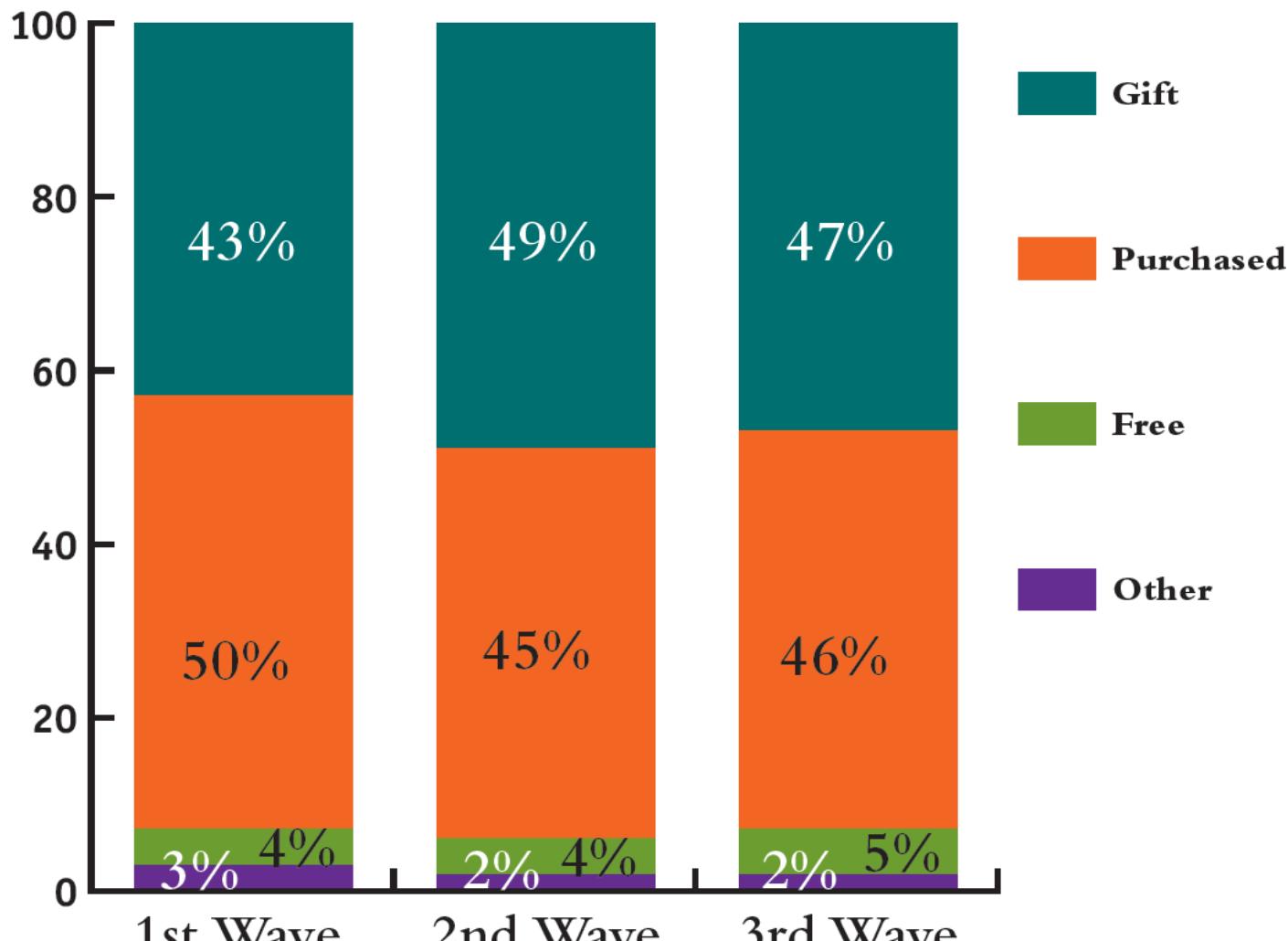
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# Acquisition Date of first eReader Device

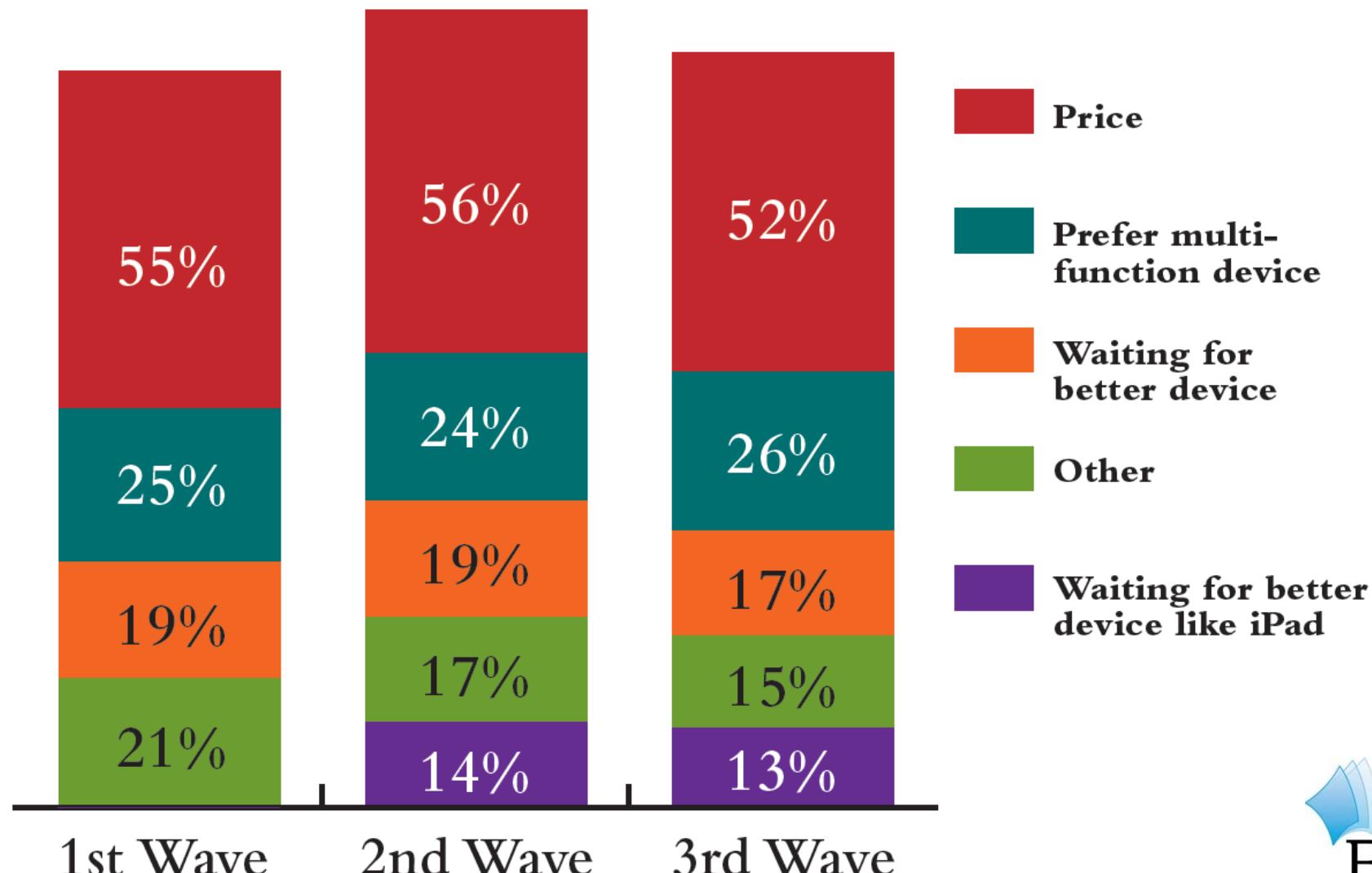


# How eReader was Acquired

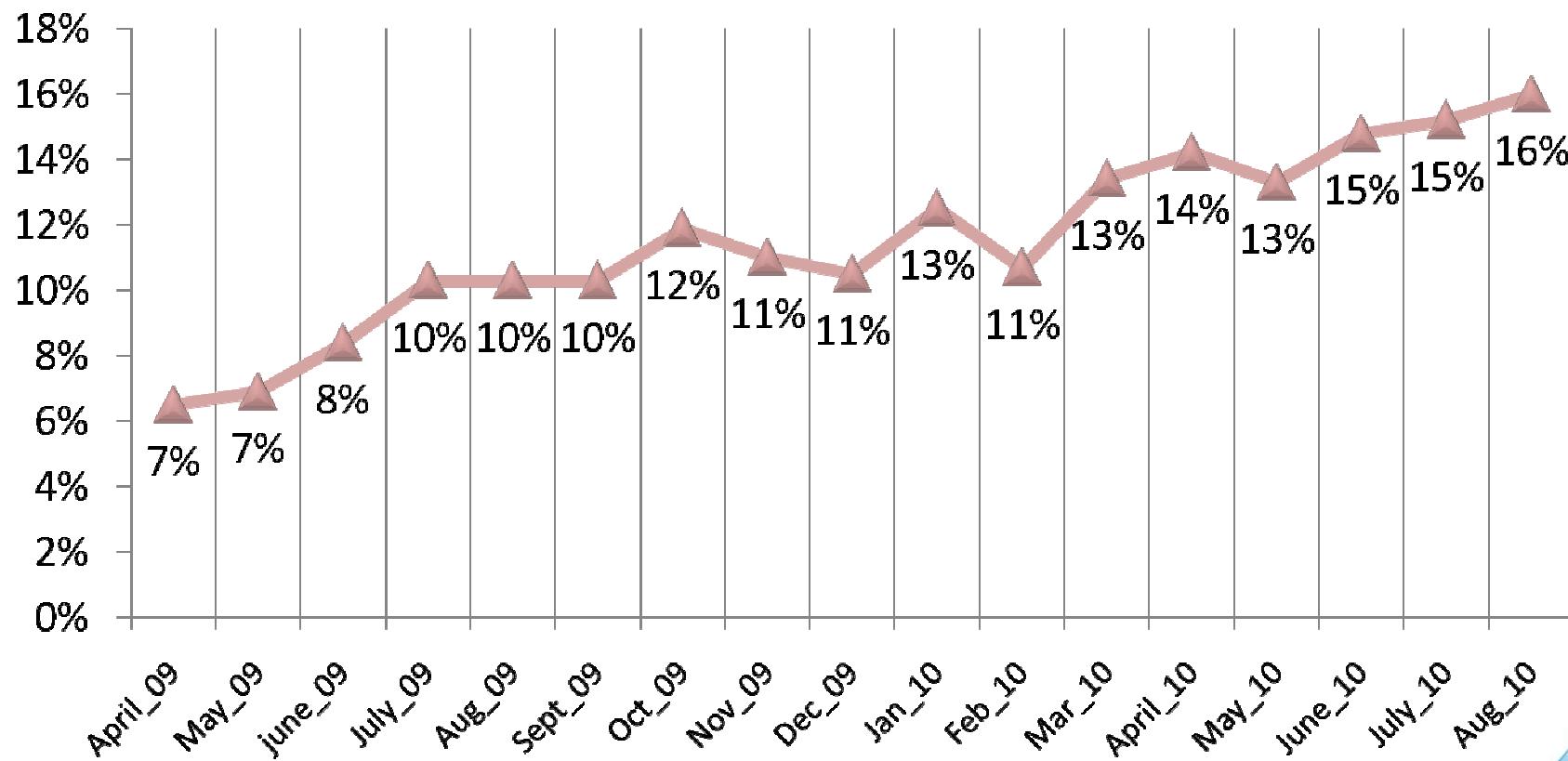


© 2010, the Book Industry Study Group, Inc.

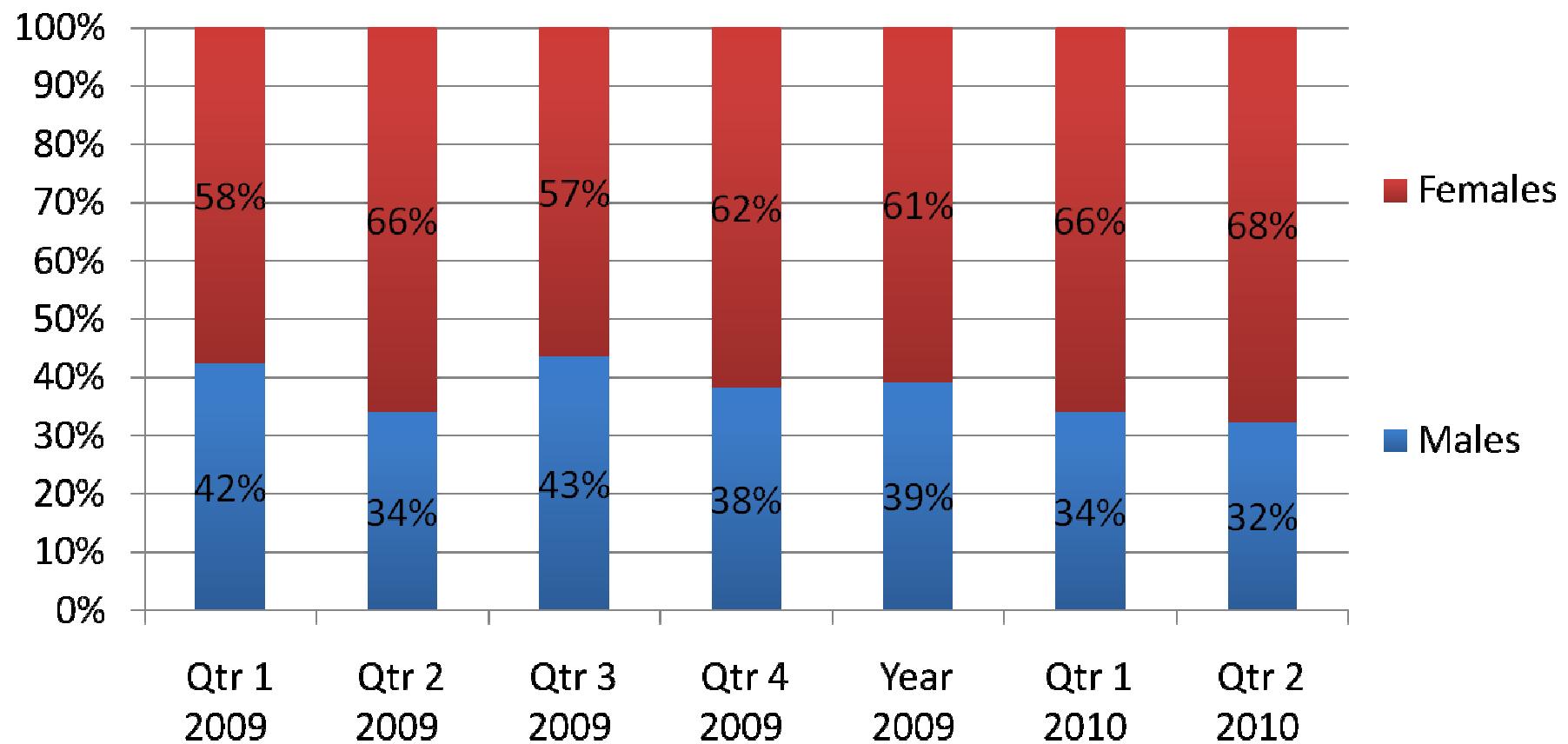
# What Keeps Consumers from Buying a Device?

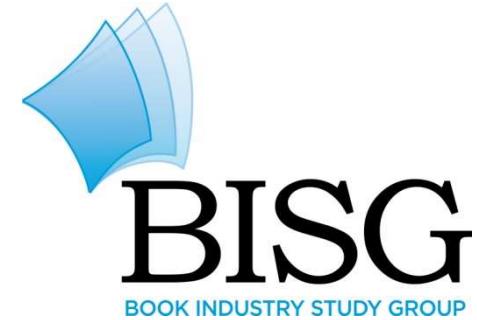
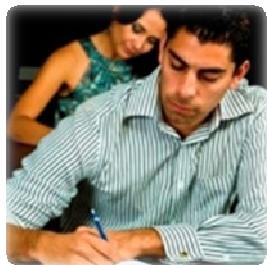


# % likely to buy eReader



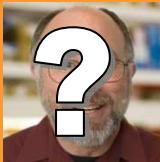
# Kindle Device Ownership – Shifting to Female





# Student Attitudes Toward Content in Higher Education

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- ▶ The survey will ask students currently attending four-year, two-year, and for-profit colleges and institutions across the United States a core set of 20 questions
- ▶ Final responses could be segmented in several unique ways:
  - By type of student (i.e., by major, year in school, etc.)
  - By type of course (i.e., more quantitative courses like math, science and engineering vs. less quantitative courses in the arts and humanities)
  - By levels of course (i.e., large lecture courses vs. more specialized courses)



# Unique Attributes

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- ▶ Ongoing study conducted 2x a year for a minimum of 2 years
- ▶ Collaborative approach to determining content and direction
- ▶ Varied demographics (mix of students from four-year, two-year and for-profit schools)
- ▶ Balanced feedback on both traditional textbooks and emerging methods, including:
  - learning platforms
  - e-content and apps
  - social and peer education networks



# Unique Attributes

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- ▶ Expert editorial analysis explaining how data trends are impacting the market now and how they might in the future
- ▶ Proprietary questions supplementing the collective findings
- ▶ Unique, interactive deliverables



# Survey Questions

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▶ 2–3 demographic questions

- Gender, age, income, etc. already available
- Demos related to profession/major, whether living on campus or off, etc. could be asked beyond the typical base-level demo questions

▶ 10–15 closed-ended questions

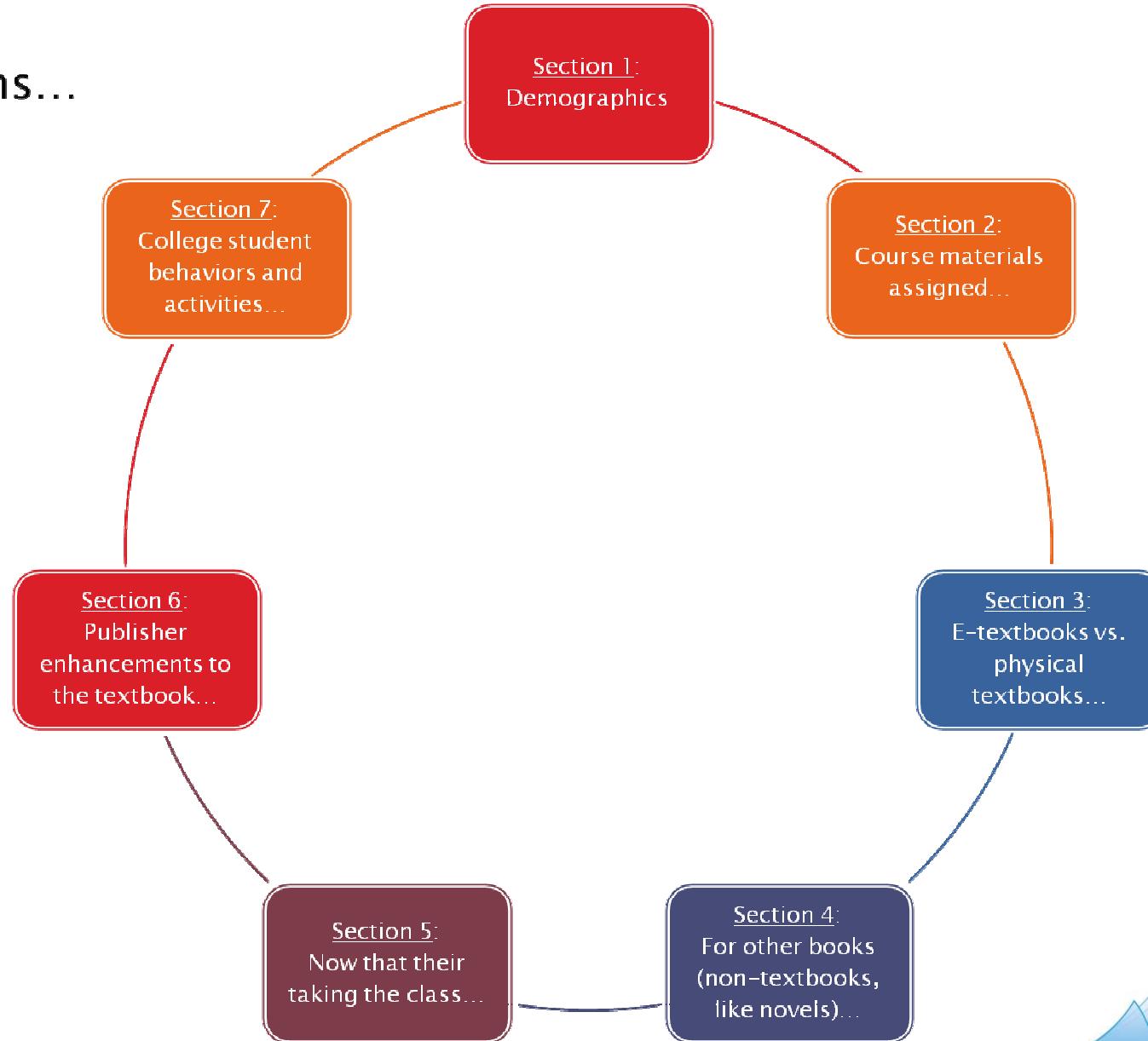
- Attitudes
- Awareness
- Acquisition
- Usage

▶ 3–5 open-ended opinion questions

- Why...?
- What if...?



# Possible questions...



# Survey Publication

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- ▶ Published as a dynamic digital report in 2 installments over 12-months, featuring:
  - **Online tools to modify and sort data** – access to web-based tool set to directly access the raw data used to create the reports – drillable and accessible when you want it, how you want it
  - **Hyperlinked Content Sources** – access to links referencing additional content, footnotes and citations
  - **Multiple Data Points** – in order to track changing trends, the survey will be conducted 2 times over a 12 month period, each time resulting in new up-to-date drillable data and a fresh PDF Summary Report



# Questions?

