eBOUND

Book Publishing:
CURRENT & EMERGING BEST PRACTICES IN PROMOTING & MARKETING DIGITAL CONTENT

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Table of Contents

Ontario

Ontario Media Development Corporation

Société de développement de l'industrie des médias de l'Ontario

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Executive Summary

This report, commissioned by eBOUND Canada and undertaken by Castledale Inc., explores how the book community is marketing e-content in an ever-changing market environment and what best practices are emerging. As part of the research, the consultant was asked to look at other content producers, with a focus on smaller companies similar in size to the largely small and micro companies that make up the Canadian owned book sector. The research embraced a brief literature scan, interviews with the other sector representatives, a survey developed with input from interviews with publishing professionals, survey analysis and report, and post-survey interviews with publishing representatives to validate and expand upon selected survey results. The research into other sectors indicated that they share many opportunities and challenges with the book sector including:

- Generating revenue in a pervasive online culture of 'free'
- Establishing priorities with limited resources
- Using data to help focus on what is working
- Engaging audiences directly

The sectors also face distinct issues. Film and television producers, for example, are competing with user-generated content; music labels are looking to event and artist management to replace lost income from CD sales and magazine publishers are dealing with advertisers who want their ads presented to look like content.

The various sectors, including books, are experimenting with content that traditionally might have been thought of as part of another sector's realm. Video in particular is being used across all disciplines as a marketing tool (e.g. book trailers).

Mobile is growing in importance for all sectors though does not yet seem to be a high priority for most book publishers in all probability because of lack of resources to explore.

Best practices for book publishers emerging from the research include:

- Strong marketing plans that cross all platforms including social media and integrate both traditional and digital tactics
- A mastery of the mechanics of incorporating metadata in e-content files
- Proactive reader engagement that focuses on going to where the readers are
- Strong e-vendor relationships
- Data collection and analysis
- Continuous experimentation including pricing and new business models like serialization, subscription and bundling

This last point bears some emphasis. The nature of experimentation is testing without proven results and with the possibility of failure. Some of what is covered in this report has yet to generate long-term, predictable outcomes although it does point in some promising directions.

The four top econtent marketing priorities that emerged from the publishers' survey were: relationships with e-vendors, websites, social media and enhanced discoverability.

Challenges include the ever present lack of resources, particularly the time and people to experiment and to research what others are doing, and an organizational lack of understanding of evolving opportunities and priorities.

Objective

eBOUND engaged Castledale to explore and report on current and evolving best practices amongst book publishers in promoting and marketing their digital content with the focus on ebooks. The research looked at publishers of all sizes and genres but the emphasis was on identifying practical, cost-effective methods that can be implemented by eBOUND's largely small and mid-sized publisher clients who operate on limited budgets.

The research looked at a wide range of factors that impact discoverability and sales including metadata, the use of social media, pricing, working with e-retailers, direct to consumer, etc. The research underscored the fact that much of what is being done is experimental without long-term proven results.

Scope and Methodology

Castledale undertook a limited literature scan, focusing on Canada, the US and the UK, which included, as requested by eBOUND, a look at practices in other media including music, film/TV, magazines and other digital content such as gaming. In addition, Castledale interviewed selected representatives from other media (magazines, film/TV and music) to validate and expand upon the insights emerging from the literature search.

Based on the research, the consultant did a preliminary draft of survey questions and then set up a series of interviews with three publishing professionals to review the survey and get additional input. The questions were refined throughout the process and the final version submitted to eBOUND for review and approval. All agreed that the scope of the research required the survey to be quite long but every effort was made to keep it easy to use.

The survey was launched on April 7 and closed on April 29. eBOUND called upon its clients and extended industry network to complete it, generating 46 respondents representing 42 publishing houses (from a list of approximately 130) - a good number in a survey-fatigued industry. The full results of the survey are attached as Appendix 1.

The survey results were then validated and tested through an additional phase of interviews with six book publishing professionals.

Findings from Literature Search and Other Sector Interviews

<u>Industry Specific Highlights</u>

Book Publishing

The literature scan confirms the on-going changing nature of the global book landscape as it impacts best practices in marketing e-content.

Book publishers are focused on enhancing the discoverability of their content through optimization of their metadata; finding and engaging readers on social media and web platforms where they congregate; working closely with e-vendors to price and promote; and collecting and analyzing data to determine what is working. Publishers continue to implement traditional 'tried and true' business models while experimenting with new ones including bundling, serialization and subscriptions. They are contending with a drop in print sales and the pervasive 'culture of free'.

Major recurring themes that emerged from the scan include:

- Reader engagement
- Social media
- Experimentation with new business models
- Data collection and analytics
- Integrated marketing plans that cross all platforms and embrace online and offline

Following are some highlights from each of these.

Reader Engagement

In a resource strapped sector, publishers are finding ways to find and push promotional information out to where their readers are rather than always trying to pull them back to the publisher's own website. Identifying and working with relevant social media sites (e.g. Goodreads) and influential bloggers that connect with the appropriate audience[1] can be key. However, there is no 'one-size-fits-all' and targeted research can save time and effort. The consultant spoke to a niche publisher with a very specific institutional market. The company spent valuable time getting all their backlist up on Goodreads based on reports they had heard from more consumer-oriented publishers. The results were extremely disappointing. Subsequently, at a face-to-face event for the target audience, the publisher surveyed the attendees and found very few of them used Goodreads but many used Pinterest. This is a small example of the need to do on-going research, including tracking trends through surveys, social

[1] http://www.publishersweekly.com/pw/by-topic/childrens/childrens-industry-news/article/49213-the-mighty-mom-bloggers.html

media discussions, polls, focus groups, competitor scans, etc., to truly understand where readers are in a digital world and how to reach them most effectively.

Digital technology has allowed publishers and authors to form a direct relationship with their audiences and many are making use of that by collecting contact and other information from readers, with their permission, and building databases. This can allow them to tailor promotional offers to specific readers and to reward loyal ones. For example, ECW Press has a reader review program called Shelf Monkey that provides free books in return for some information about the reader and a commitment to post a review within a month of receiving the title.

Social Media

Social media platforms are now part of most publishers' marketing toolkits. The challenge is often in determining which platforms to focus on with limited resources. High on most publishers' lists are Facebook, Twitter, Instagram, Pinterest, YouTube, Google + (this last is particularly important in ensuring ranking in terms of searchability) and Goodreads[2]. It is important to be selective. With limited budgets and staff time, it is impossible to be everywhere successfully.

One tool that can get lost in the avalanche of new social media platforms is email.

"*We find it very useful from an author and publisher perspective. We have some newsletters for authors that have better than a 50% open rate. We have invested a lot in trying to build our in-house and author newsletter capacity*." - Fassier (Penguin Random House)[3]

Publishers are recognizing the growing impact of image and video based social media platforms like YouTube, Pinterest, Tumblr, Vine and Instagram. For example, on its YouTube channel, Annick Press has posted a corporate 'branding' video covering a number of its current titles along with book trailers and author interviews.[4] The video links viewers back to the company website.

In addition to acting as a broadcast channel, social media can be used to 'listen' to readers and potential readers to spot reactions to books and to identify emerging trends. This provides a powerful research tool that can help the industry engage more effectively with its audience.

Experimentation/New Business Models

Publishers are experimenting with all aspects of the marketing mix and with new business models.

[2] http://www.digitalbookworld.com/2014/which-social-media-and-marketing-tools-are-publishers-actually-using-successfully/

[3] http://www.digitalbookworld.com/2014/which-social-media-and-marketing-tools-are-publishers-actually-using-successfully/

[4] http://www.youtube.com/watch?v=E_3Qup2LkpA

One of the opportunities offered by an online environment is the ability to test pricing, either directly on a publisher's own website or working with an e-vendor. Publishers are testing everything including offering free content, discounting for a limited time, serialization, subscription and bundling e-content with print.

Several presses that the consultant talked to offer ebooks with the purchase of the print book and others are considering doing so. The results are varied but most (75%) of the publishers surveyed who have experimented with bundling felt there were positive results.

"From a strategic standpoint, publishers are deciding between using the added value of bundles to improve their retail relationships or to improve their relationships with readers directly. The fact that most presses only sell bundles direct shows that publishers are increasingly focusing on their relationships with readers." [5]

New services like Oyster and Scribd are offering subscriptions to readers for unlimited access to their libraries for a low monthly cost, emulating the Netflix model. Oyster, for example, offers over 500,000 books, with more being added all the time, for $9.95 a month. Some Canadian publishers surveyed are beginning to experiment with the subscription model.

The jury is still out on whether this will be a steady source of income for publishers and authors without cannibalizing other sales. The model is based on paying only when the book is partially read. The payment amount is calculated on the digital list price of the book. The formulas that calculate what counts as 'read' are fairly complicated and differ between services.

Some publishers are experimenting with direct subscriptions. ChiZine Publications (publishes dark fiction and fantasy) is offering all 23 titles it publishes in 2014 in digital format only for $99[6]. Coach House Press has a special VIP program for readers called C.H.I.P.S (Coach House Important Person) program that offers members (for a monthly fee or $10) an assortment of benefits from a selection of titles to a tour of the Press. There is also an e-only version (MicroC.H.I.P. Program) for a lower monthly fee ($5) that provides subscribers with 7 ebooks per year.

One ostensibly 'new' model - serialization - is a revival, in a digital environment, of a long-standing one. Again, the industry is experimenting with various pricing models from 'pay once and get all the installments' to 'pay by installments' (a typical range seems to be 1.99-2.99 per installment)[7]. Some offer an introductory offer at the low end and increase the price for later installments.

Data collection and analysis

Collecting and analyzing data on readers has not traditionally been a core strength of book publishers who have relied on booksellers and other intermediaries. One clear opportunity

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[5] http://publishingperspectives.com/2013/08/ghost-in-the-machine-does-printebook-bundling-have-a-future/
[6] http://chizinepub.com/
[7] http://gigaom.com/2012/09/18/the-serious-business-of-kindle-serials/

offered by the shift to digital is the ability to have a more direct relationship with readers allowing publishers to find out more about what they like, buy, share and consume. "Some publishers are using promotional giveaways to build direct relationships with end users, collecting email addresses, names, etc. They are also following up with these same audiences by offering discounts, book clubs and VIP extras to increase sales and relationships. Every step of the way can and should be used to collect data."[8]

Because it is time and resource consuming, publishers need to develop clear strategies for what they are collecting and how they are using the information gathered. It is a waste of time and effort to gather information that the company does not have the capacity to use to build sales and reader relationships.

Integrated marketing plans

The fundamentals of good marketing remain the same, even in a digital environment. There appears to be a renewed focus on solid planning that embraces audience research, clear objectives (e.g. increase in revenue, increase in sales units, new markets, increase in web traffic, positive reader feedback, etc.), focused implementation strategies (e.g. updated website, expansion of social media, experimentation with new business models, improved metadata, etc.) matched with available resources and on-going measurement and analysis.

Digital is no longer segregated as a separate marketing tactic but integrated into an overarching strategy. Thus, in emerging best practices, traditional and new reinforce each other. Print books include the web address, the website has a link to a YouTube channel, an author's blog links to a retailer site, social media promotes an author tour and so on.

Other Sectors

The literature scan into other sectors was supplemented with three interviews: one with a small arts magazine, one with an independent film/TV producer who is now positioning herself as a multi-media producer and one with a small music label specializing in jazz that is expanding its services to include handling some rights licensing for artists on its roster. Although a small sampling, the interviews highlight the on-going change that is impacting all the creative industries and provide some examples that might be of interest to book publishers.

Following are insights emerging from both the literature scan and the interviews.

Music

Of all the sectors looked at, music has had the longest track record in marketing digital content. It is also furthest ahead in the transformation from physical to digital with predictions that this is the year when the sale of digital albums will surpass those of physical ones.[9]

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[8] http://www.digitalbookworld.com/2013/using-metadata-to-market-books-build-audience-and-control-your-future/

[9] http://www.billboard.com/biz/articles/news/digital-and-mobile/5901188/cd-album-sales-fall-behind-album-downloads-is-2014-the

In the post-Napster era, the selling power of videos has a major impact across the industry with one industry insider saying about YouTube that it is "...essential for discoverability. It's the source."[10] The use of Vine, Instagram and other platforms for short videos is also on the rise.

As in the book world, the effective use of keywords heavily impacts how music videos show up in Google's Video Search results (Google owns YouTube) and music marketers need to master how they tag their content for greatest success.[11]

Mobile access is huge in the music world with the number of fans using tablets or smart phones to access their favourite musicians predicted to grow by 30-35% over the next year.[12] Thus, having a mobile marketing strategy is increasingly important.

Music labels work very closely with their artists with a trend to 'working more selectively with artists and focusing on creating more creative campaigns that ever before'.[13]

The rise of streaming music services (e.g. Songza, Pandora, Beats, Spotify) has allowed indie artists to get exposure without having to go through one of the major labels. In 2013 the song "Thrift Shop", by indie artist Macklemore & Ryan Lewis rose to No. 1 on the Billboard charts, the first time since 1994 that a non-major-label artist has done so.[14]

The consultant interviewed a small independent Canadian jazz label owner who said that he considers streaming as a marketing activity rather than as a sales channel because the royalties paid are so small. This would not necessarily be the case for all music labels but is his experience as a very small company.

He and his artists use streaming to build awareness and then monetize other activities, primarily live performances. He felt that the exposure streaming can provide to musicians who are not major 'stars' is giving rise to a new 'middle-class' of musicians who can grow viable fan bases this way. Many of his artists also post free samples of their work to SongCloud to drive awareness. This example is very similar to self-published authors in the book world giving their work away for free online in order to build a following.

With very limited resources (much like many small publishers), he focuses his efforts on building a sense of community amongst his stable of artists and encourages them to cross-promote each other's work. Most are actively involved in social media (particularly Facebook and Twitter) and have between 1000-3000 followers each. The cumulative impact of their various networks amplifies the marketing efforts undertaken by the label directly.

His artists' works are featured on his website which links directly to an online music store (cdBaby). Individual tracks are sold for .99. Apparently this is not a major source of income.

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[10] http://www.dmnews.com/4-viral-tips-from-the-music-video-man/article/307489/
[11] http://hypebot.com/hypebot/2013/12/best-of-2013-how-to-get-more-views-on-youtube.html
[12] http://musiciancoaching.com/music-news-2014/digital-music-marketing-indie-artists-vimeo/
[13] http://musiciancoaching.com/music-news-2014/digital-music-marketing-indie-artists-vimeo/
[14] http://musiciancoaching.com/music-news-2014/digital-music-marketing-indie-artists-vimeo/

He has a YouTube channel but says his artists generally are the drivers behind their own videos although he would like to be more active in this area.

He is considering expanding the service he offers musicians to managing some of their music publishing rights (e.g. synchronization and mechanical licenses) for a fee (similar to an agent's). He described this sort of licensing as 'the last bastion of revenue' in the sector.

Both the research and the interview underscored the reality that marketing digital content in an environment where 'free' is the norm is challenging. That said, the direct relationship with audiences is opening up new opportunities, particularly for indie artists and labels.

The music industry continues to experiment with everything from partnering to bundling (e.g. CD plus vinyl album), and alternative formats. For example, singer/songwriter, Trent Reznor, planted unmarked memory sticks containing new material in bathrooms at a concert resulting in a viral hit[15].

Film/TV

Film and TV producers are facing an environment where more and more content is user generated and available for free online. Social media has become a source of entertainment in its own right and is a huge influencer in audience engagement with both film and television. This has opened up some opportunities for independent filmmakers as they now have a way to access their audiences directly without going through a major studio, broadcaster or distributor in the same way that, in the publishing world, both publishers and authors can now get directly to their readers without going through bookstores. At the same time, the expectation that content will be available for free means that filmmakers have to find new ways to generate revenue.

One opportunity that has emerged is crowd-funding as a new way of both financing projects and building community that helps market that project. That said, managing a successful crowd-funding campaign can be hugely time-consuming with no guarantee of success[16]. Indies with tiny budgets are also using social platforms to cast and staff projects to minimize costs.

Viewers (particularly younger ones) are on social media platforms at the same time as they are watching television shows and movies. An American study shows that 79% of television viewers visit Facebook while watching TV[17] and a 2013 Canadian study says that 62% are on a second screen while watching television[18]. This opens up some interesting cross-promotional marketing opportunities as viewers can actually be commenting to friends on content as they watch it. This new 'word of mouth' has become a potent driver of awareness.

[15] http://music3point0.blogspot.ca/2011/03/10-great-music-marketing-ideas.html
[16] http://www.huffingtonpost.com/britt-michaelian/social-media-is-a-major-g_b_4284162.html
[17] http://www.hollywoodreporter.com/gallery/facebook-twitter-social-media-study-302273#3-how-social-networking-impacts-entertainment-choices
[18] http://www.cmf-fmc.ca/about-cmf/industry-research/trendscape-blog/launch-of-the-third-white-paper-on-the-second-screen-and-television/175/

Filmmakers are recognizing that they are producing content for a multi-screen experience that includes the web. In response many are creating short form videos, targeted to social media platforms, that help to build audience for their 'brand' and possibly for their longer form content. In essence, they are using video to market video.

The consultant interviewed a small Canadian documentary maker who is transitioning from being a traditional producer of content for television and theatre broadcast to being a multi-media company that produces high quality film, television and new media productions for the web. She is using the analytics capacity of the digital environment to identify subject matter that web users are searching for. Her research has indicated to her that reality-based niche content is the way to go.

She cites the apparent success of niche oriented YouTube channels that aggregate content around certain subjects that have generated strong interest (she used the example of skateboarding[19]). Such a channel might include videos on everything from what clothes skateboarders wear through 'how-to' instructions to the 10 best places to skateboard. Some content is free but some is paid for. In addition, if the producer can attract a sufficient number of visitors, ad revenue becomes a real source of revenue, as does the sale of other product offerings (including books!).

She is using Google Keywords to identify popular niche topics and trends that she might be able to produce video content around and/or encourage submission of user-generated content although she felt the quality of the latter was often poor. Her longer-term goal is to build a branded online destination on a particular topic emerging from her research.

The producer described her proposed process as follows:

- Research popular keywords, using tools like Google Keyword Toolbox[20], to get insights into topics that people are looking for.
- Create a YouTube channel
- Produce short but high quality videos on the chosen topic to post on the YouTube channel plus be prepared to create/offer other related content. Experiment by testing offers before actually creating the final content.
- Offer content that is free mixed with some that you charge for. Be prepared to experiment with pricing including offering discounts.
- Develop and implement a marketing plan to drive visitors to the site using both traditional and digital marketing techniques from search engine optimization to purchase of keywords.

Although this is just one example, it represents the kind of opportunities that are out there that can be used by small organizations to market digital content. It is still experimental without proven return but shows promise for those prepared and equipped to do the research and implementation.

Magazines

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[19] http://www.youtube.com/user/RIDEChannel
[20] http://www.googlekeywordtool.com/

The *Innovations in Magazine Media 2014 World Report*[21] states that major and growing influencers on the sector include mobile, big data, video and native advertising (paid content that is created by the magazine in collaboration with the client and that often looks like part of the editorial flow - a new sort of advertorial).
Magazines that have the resources are redesigning their websites with mobile in mind[22] and adding video content to attract viewers.

Many magazines are experimenting with subscription services like NextIssue that offer subscribers a one-price option for access to multiple magazines. The book equivalents are services like Oyster and Scribd. In 2013, approximately 72% of Canadian magazines reported having digital replica editions[23] (i.e. an edition that is identical to the print edition often with hyperlinks to additional material). With the growth of mobile, many are experimenting with innovative interactive content that combines print, audio visual and even game elements[24].

However, for many smaller Canadian magazines, the focus remains on keeping on top of the basics and innovating within very limited resources.

The consultant interviewed a small art magazine that is working on updating its website using WordPress. The new site will be mobile responsive. The publisher is considering following the example of another small literary magazine that aggregates content from others around themes that are relevant to their audience (for example book and movie reviews, user-generated content, links to other magazines/blogs, etc.). The hope is that this aggregation of content draws a broader audience to the site that will then subscribe to the print magazine.

This model is like that of a blog carnival (a curated themed collection of links to other blog posts - a sort of digital anthology or compilation[25]) which is designed to increase traffic to all the participating sites.

The art magazine publisher is also following the progress of that same literary publisher who has developed an app that delivers some 'best of' content to iPhone and Android devices.

The art magazine is enhancing its social media strategy to coincide with the relaunch of the website. They currently have an intern who is working on this. The focus will be on Facebook (which she feels is less effective than it once was), Twitter to create buzz and Tumblr and Instagram with their focus on visual content.

She stressed that their ability to keep up with social media and new content on their website and to collect and analyze data is very dependent on having the resources for additional staff as the core staff do not have the time.

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[21] http://www.fipp.com/Innovations
[22] http://money.cnn.com/2014/01/08/technology/innovation/new-york-times-redesign/
[23] http://www.auditedmedia.ca/news/research-and-data/top-10-canadian-consumer-magazines-for-december-2013.aspx
[24] http://www.magplus.com/create-interactive-magazine-brilliant-example/
[25] http://natureblognetwork.com/blog/what-is-a-blog-carnival/

They are still in the process of digitizing all their back issues and are struggling with exactly how to use their digital content going forward - should they monetize it or offer it for free to drive subscriptions or do a combination? She is considering creating themed ebooks in PDF format and offering them for sale on the site.

Gaming

The gaming industry is facing a transition from a paid to predominantly free-to-play model[26] and many companies are experimenting with embedding added value up-sell opportunities within the games themselves (e.g. play level one for free but pay if you want to get to level two).

The industry is going more and more mobile with the on-going proliferation of smart phones and tablets. Mobile games are easier to update than traditional formats[27] and can be readily shared with others.

Games developers are also finding that many other content producers are looking to 'gamification' as a marketing tool in itself.

All Sectors

The literature search and interviews with other sector representatives indicate that the various creative content industries (books, magazines, film and television, music and interactive digital media) share many common opportunities and challenges in marketing their digital content.

A recurring theme that emerged was the need for reinforcement of fundamental marketing practices such as strong plans that integrate both traditional and digital methodologies, market research, customer/audience engagement, competitive analysis, measurement and data analysis. There was also a recognition that companies have to establish priorities as it is impossible to do it all effectively. This places greater emphasis on tracking and analyzing data to determine what works.

On the digital side, much of what was once considered new is now well established and forms a part of the fundamental suite of marketing activities common across all disciplines. These include websites, relevant social media platforms, search engine optimization (SEO) and data collection. Mastering how to make these foundational tools work well and work together is particularly important to companies that have limited budgets and resources.

At the same time, there is the growing importance across all content producers of mobile.

"There couldn't be a safer bet than to predict that mobile will continue to grow in significance for businesses as more customers adopt tablets and smartphones (and wearable technology) to surf the web

[26]http://www.bigfishgames.com/blog/2014-global-gaming-stats-whos-playing-what-and-why/
[27] http://gamepill.com/news-trends/

and, increasingly, shop online. 2014 will continue to see businesses work harder to improve the mobile experience, and to understand what mobile means to their customers."[28]

Building strong communities and using the power and interconnectedness of those relationships is becoming a fundamental marketing strategy across all disciplines.

There is also an understanding that there needs to be on-going experimentation with new and evolving opportunities such as mobile apps, crowd-sourcing, bundled content and subscription models, just to name a few. All sectors are challenged to find new business models that recognize the prevalence of 'free' in a digital world.

All of the sectors are struggling with shifting revenue streams and increased competition for customer/audience time and attention across all channels. There is also a blurring of lines across previously distinct sectors with each dipping a toe in the other's business in search of sustainable revenue.

Survey Highlights

The full report is attached as Appendix 1. The following is a summary of highlights that focus on emerging best practices in marketing e-content.

General
A total of 42 Canadian publishers responded to the survey (out of a list of approximately 130 Canadian-owned publishers across the country) representing a cross-section of those focusing on trade (fiction and non-fiction including children's books), scholarly and educational publishing. Consistent with the make-up of the Canadian owned sector across the country, most are small to medium sized firms with five or fewer staff.

Marketing Plans/Budgets/Staff
The majority (70%) have a written marketing plan that includes a strategy for digital content. However over 57% do not have budget dedicated to digital. A significant majority have dedicated marketing staff (75%) with almost 60% having more than one person.

E-content
All the respondents are producing ebooks with over 22% publishing esingles and enhanced ebook content.

Metadata/Searchability/Discoverability
A significant majority (83.3%) is comfortable that their metadata is complete but only 13.9% indicated that they had a consistent Search Engine Optimization strategy across all platforms. Only a little over 36% are using tools like Google Keywords Search Tool to help identify and maximize keywords that would help with search and discoverability.

[28] Quarterly Digital Intelligence Briefing: 2014 Trends, Econsultancy in association with Adobe

Digital Rights

Over 88% of respondents always or sometimes acquire world digital formats when acquiring titles. Fewer are selling digital rights in other markets with 'French rights outside of Canada' providing the most opportunity with 75% selling these rights.

Subscription Services

This is a growing area of interest with over 30% exploring selling rights to services like Oyster and Scribd and another 50% interested in doing so.

Websites/Blogs

All respondents that answered the question had websites and most (83.3%) are updating them at least once a week. More than half (52.8%) are selling their digital content directly to readers on their website.

A little more than 52% have a company blog with over 47% of those posting at least once a week.

Social Media

Over 47% of respondents have a staff member responsible for social media with another 44% sharing the role amongst staff members. Most popular platforms are Facebook, Twitter, Pinterest and YouTube with Instagram on the rise.

Only 18 responded to a question about using tools to measure the success of their social media activities and of those over 88% used Google Analytics with fewer using Facebook Insights and Hootsuite.

Author Involvement

Publishers see their authors as essential partners in marketing their books with 88.9% feeling that way for both digital and print content. More than 83% of respondents have reciprocal links with authors' websites.

Reader Relations

Over 69% of respondents are actively researching where their readers are online (websites, blogs, social media networks) and over 80% are identifying key influencers in these areas and offering them special promotions and incentives. Publishers are finding their readers on 49th Shelf, Goodreads, Quill and Quire, Publishers Weekly and Booklist amongst others.

E-content Pricing

This is an area of continued experimentation with almost 66% trying out promotional prices, many in collaboration with their e-vendors. Only 37.1% are experimenting with bundling but of these 75% report moderate to great results. Others indicate this is an area that they are exploring.

Over 48% have tried offering some sort of free e-content from excerpts to ebook free with print.

The pricing difference between ebooks and trade paper varies substantially depending on the publisher (see the Appendix for details).

Libraries

Over 71% of those that responded (20) are selling ebooks to libraries and again the pricing models vary (see Appendix for details).

Digital Content Marketing

Publishers are using book trailers, author videos and podcasts and, to a lesser degree webcasts/webinars and mobile apps to market digital content. They are participating in collective marketing opportunities as follows: Kobo Indie Store 51.4%, BookNet Canada CataList Catalogue 40%, and the 49th Shelf Ebooks Promotion 28.6%.

New Business Models/Analytics

Many are experimenting with models like subscription and serialization. One is offering a 'daily read'. Most are using analytic tools to measure the impact of such activities on their websites, however only 48% said they were either very or somewhat comfortable with their capacity to use analytics in a meaningful way. This may be an area where more could be done.

The majority have access to sales reports with close to 43% using eBOUND's service.

Sales/Distribution Channels

Most publishers are distributing to various sales channels both directly and through a service with only 25% just doing so directly and 34.4% just using a service. The top 5 channels are Kobo, Amazon, Google, Apple and Barnes and Noble.

The top 5 library/institutional channels are Canadian Electronic Library, Google, Ebrary, MyiLibrary and NetLibrary (which is owned by EBSCO).

Only 44% of respondents regularly conduct sales meetings with ebook vendors and only 37.5% promote pre-publication pre-orders.

The top marketing tactics for enhancing sales are featured placement by e-vendors, promotional pricing and reviews.

Priorities

The top four priorities in marketing e-content chosen by respondents are: relationships with e-vendors, websites, social media and enhancing discoverability.

The top three challenges are: resources to experiment, lack of time to research what others are doing, and organizational lack of understanding of opportunities and priorities.

Post-Survey Interviews

This phase of interviews focused on exploring and validating some of the top level findings from the survey.

The consultant interviewed representatives from six Canadian owned publishing houses.

One of the issues arising from the survey that the consultant explored in the interviews was the slight disconnect between the apparent comfort with metadata but the continued struggle with discoverability and search engine optimization.

Here are some of the comments.

- *We are good at meeting the mechanical standards but find it harder to use for marketing. For literary fiction it is like trying to catch lightning in a bottle. It's easier for non-fiction.*
- *People talk about discoverability as being metadata but really it is in repeat buys. Look at any e-retailer and it is the big books that are selling more that appear high in the rankings.*
- *Metadata still remains a challenge but we have made it a priority. It is our mantra and we are working to maximize its potential for marketing. As a new review appears, we pull quotes immediately and get it out to all customers. However, we don't have an in-house system to review once the information is out there.*
- *We have an online system to manage metadata but one of the issues that we have is that what we put in doesn't necessarily propagate throughout the system. It goes through several channels and doesn't always look the same at the other end. For example a cover might be missing.*
- *It continues to be a challenge to get consistency across all formats with all e-retailers. It is fine at our end but not at the receiving end. It drives you crazy. There is an issue in the translation (i.e. there are variations in how the metadata is read by different e-retailers) for ebooks.*

Conclusions

In a rapidly evolving marketplace, book publishers share both opportunities and challenges with other content producers in marketing their digital content.

Challenges include an expectation that content will be free and an increasingly competitive environment. Book publishers are competing with self-published authors who offer their work on sites like Wattpad; film and television producers face competition from user generated content that is readily viewable on outlets like YouTube; magazines compete with a multitude of blogs and ezines.

In terms of opportunities, publishers and other content producers now have the ability to find and reach their audiences directly. Forming a relationship with readers that allows a publisher to both promote and to seek feedback is ever more possible and necessary in a digital environment.

The research, interviews and survey results show a book publishing industry that is evolving a number of best practices in marketing its e-content including:

1. Strong marketing plans that cross all platforms including social media and integrate both traditional and digital tactics.

> The majority of publishers have written marketing plans and are using the basic digital marketing toolkit of websites, blogs and social media with many adding in book trailers, author

videos and podcasts. A few are experimenting with mobile apps, however, websites, social media and enhancing discoverability remain top priorities.

Traditional and digital tactics are being planned and implemented together to ensure one integrated strategy using all available means.

2. A mastery of the mechanics of incorporating metadata in e-content files:

With the support of associations like eBOUND and BookNet, publishers are becoming ever more comfortable with managing their metadata, particularly in the mechanics of file production. That said , there are still kinks in the system that result in data being 'lost in translation' between the initial input and final receipt by the various e-retailers. Not many publishers have the capacity to monitor the outcome on a regular basis so errors go unnoticed, in all probability resulting in lost sales.

3. Proactive reader engagement that focuses on going to where the readers are:

Publishers are researching where their readers are online (websites, blogs and social networks), identifying key influencers in these communities and offering them special promotions and incentives. As mentioned previously, social media and enhanced discoverability are amongst publishers' top priorities.

4. Strong e-vendor relationships:

Developing and maintaining good relations with e-vendors is a priority. The top three marketing tactics for enhancing sales of econtent were identified as: featured placement by an e-vendor, promotional pricing by an e-vendor and reviews. However, only a minority of responding publisher (37.5%) are promoting their econtent to e-vendors pre-publication.

5. Data collection and analysis:

Most publishers surveyed are tracking and analyzing but many feel they would like to know more about using analytics in a meaningful way.

6. Continuous experimentation including pricing and new business models like serialization, subscription and bundling.

Many are trying out new business models. For example, over 30% of publishers responding to the survey are selling econtent to subscription services like Scribd and Oyster. Publishers continue to experiment and struggle with issues like pricing and discoverability.

Experimentation is key to moving forward but is often difficult for resource-strapped publishers to undertake. Collective activities that help the smaller and mid-sized publishers that make up the majority of the Canadian owned sector to undertake new initiatives and to share evolving best practices are one way to ensure the on-going health of the industry.

Publishers identified the following top three challenges in effectively marketing their econtent: having the resources to experiment, lack of time to research what others are doing and organizational lack of understanding of opportunities and priorities.

Appendix 1

eBOUND Canada
Digital Marketing: Best Practices Survey Responses

Summary

In order to better support the publishing community, eBOUND Canada has undertaken to gather information about the current and evolving best practices for marketing digital content. eBOUND engaged Castledale Inc. to conduct this survey and prepare a report focusing on practical and realistic options for publishers with limited resources.

This report provides a summary of the results of the survey which was sent to eBOUND Canada's clients and industry networks across the country. There were a total of 46 responses representing 42 publishing houses (3 houses had more than one person responding. This report eliminates the duplicate answers.)

General Information

Of the 42 publishing houses responding to the survey over 66% are involved in publishing trade non-fiction titles, over 42% publishing trade fiction and children's titles and over 33% young adult books. Not surprisingly many of these publishers are publishing several different genres with very few specializing in just one area. Those that are, are focusing on children's/YA and one is focusing on drama. Surprisingly 7 publishers are publishing works of drama as well as other genres.

The majority of the publishers responding are small to medium sized firms with over 47% having 5 or fewer staff members, over 37% having 6 to 20 and only a little over 14% have 21 or more on staff.

1. What kinds of books does your company publish? (check all that apply)

Answer Options	Response Percent	Response Count
Trade Fiction	42.9%	18
Trade Non-Fiction	66.7%	28
Poetry	40.5%	17
Drama	16.7%	7
Children's	42.9%	18
YA	33.3%	14
Educational (K-12)	14.3%	6
Scholarly/Academic	33.3%	14

Other (please specify)	2
answered question	**42**
skipped question	**0**

Other: Business/Comment about a change in publishing to focus on non-fiction.

2. How many people does your company employ on a full-time or permanent part-time basis (i.e. not freelancers)?		
Answer Options	**Response Percent**	**Response Count**
5 or fewer	47.6%	20
6-10	16.7%	7
11-20	21.4%	9
21-30	9.5%	4
31 or more	4.8%	2
	answered question	**42**
	skipped question	**0**

Digital Content Marketing Infrastructure

The publishers responding are well on the road to putting an infrastructure for marketing digital content into place with a total of 70% indicating that they "absolutely" or “somewhat" have a written marketing plan that includes a strategy for digital content. However, over 57% stated that they do not have a dedicated marketing budget for this activity. The 48.5% that have allocated a budget for this activity are investing a significant amount of funds with over 44% spending $5,000 plus per year and only 11% spending $500 or under. These companies are dedicating staff to working on econtent marketing with 75% having staff assigned to these roles to a greater or lesser degree with 43% assigning one person to the activity, close to 47% have 2 to 4 assigned and 10% have 5 to 8.

3. Do you have a written marketing plan that includes strategy for your digital content?		
Answer Options	**Response Percent**	**Response Count**
Yes, absolutely	20.0%	8
Yes, somewhat	50.0%	20
No	30.0%	12
	answered question	**40**
	skipped question	**2**

4. Do you have a dedicated budget for marketing your digital content?		
Answer Options	**Response Percent**	**Response Count**
Yes, absolutely	17.5%	7
Yes, somewhat	25.0%	10
No	57.5%	23
	answered question	**40**
	skipped question	**2**

5. If you answered "yes" to the question above, what is the range of your annual digital content marketing budget?		
Answer Options	**Response Percent**	**Response Count**
Under $500	11.1%	2
$501 - $1,000	11.1%	2
$1,001 - $3,000	27.8%	5
$3,000 - $5,000	5.6%	1
$5,000 plus	44.4%	8
	answered question	**18**
	skipped question	**24**

6. Do you have dedicated marketing staff?		
Answer Options	**Response Percent**	**Response Count**
Yes	75.0%	30
No	25.0%	10
	answered question	**40**
	skipped question	**2**

7. If yes, how many?		
Answer Options	**Response Percent**	**Response Count**
1	43.3%	13
2-4	46.7%	14
5-8	10.0%	3
9 plus	0.0%	0
	answered question	**30**
	skipped question	**12**

Econtent Publishing Strategy

The responding publishers are clearly working towards a solid econtent publishing strategy but some are stumbling with discoverability.

One hundred percent are publishing ebooks. Over 22% are publishing enhanced ebooks and the same number are publishing esingles. Only 5.6% are experimenting with serials. A few are creating PDFs for educators and libraries and one is creating white board products.

The comfort level with metadata is high with 83.3% either very comfortable or somewhat comfortable that their metadata is complete. Only 2.8% were somewhat uncomfortable.

Regarding BookNet services only 29 responded to the question but those who did are participating in its services with almost 90% using BiblioShare and almost 83% using CataList.

When asked about the use of tools to help identify and maximize keywords for discoverability only a little over 36% indicated that they are making use of these services. More than 58% percent manage their own search engine optimization and over 33% don't use it at all. In terms of a consistent SEO strategy across all platforms, only 13.9% have one and 86.1% do not.

8. Which of the following econtent formats do you publish? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
ebooks	100.0%	36
esingles	22.2%	8
Enhanced ebook content (including interactive	22.2%	8

components)		
Serials	5.6%	2
Other (please specify)		3
	answered question	**36**
	skipped question	**6**

Other: white board products/pdf of two professional books sold via dedicated websites only/PDFs- used for previews by educators and library users/pdfs for school library use

9. How comfortable are you that your metadata is complete, correct and current?		
Answer Options	**Response Percent**	**Response Count**
Very comfortable	38.9%	14
Somewhat comfortable	44.4%	16
Neither comfortable or uncomfortable	13.9%	5
Somewhat uncomfortable	2.8%	1
Quite uncomfortable	0.0%	0
	answered question	**36**
	skipped question	**6**

10. Which of the following BookNet Canada services do you use to help with your metadata and marketing needs? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
BiblioShare	89.7%	26
CataList	82.8%	24
Other (please specify)		1
	answered question	**29**
	skipped question	**13**

Other: Sales Data

11. Do you use tools (e.g. Google Keyword Planner) to help identify and maximize your keywords and your

discoverability?		
Answer Options	**Response Percent**	**Response Count**
Yes, often	11.1%	4
Yes, sometimes	25.0%	9
No	63.9%	23
	answered question	**36**
	skipped question	**6**

12. Do you manage your own search engine optimization (SEO) in-house?		
Answer Options	**Response Percent**	**Response Count**
Yes	58.3%	21
No	8.3%	3
Don't use search engine optimization	33.3%	12
	answered question	**36**
	skipped question	**6**

13. If not, who do you work with?
-web developer -an external specialist -Cornerstone -Lifeline Systems

14. Do you have a SEO strategy that is consistent across all your platforms (econtent, website, blog, social media, press releases, etc.)?		
Answer Options	**Response Percent**	**Response Count**
Yes	13.9%	5
No	86.1%	31
	answered question	**36**

skipped question	6

Digital Rights

The issue of digital rights is on the minds of respondents with over 88% acquiring world rights for digital formats when acquiring titles (63.9% always, 25% sometimes). With regards to selling digital rights in other markets only 16 respondents answered this question but we can see that "French rights outside of Canada" is providing the most opportunity with 75% selling these rights. "English outside of Canada" and "French in Canada" were tied with just over 56% selling in these markets. Other rights that are being sold are German, Swedish, Danish, Chinese, Japanese, Thai, Dutch and Korean.

Subscription services such as Scribd and Oyster are on the radar screens of respondents with over 30% exploring selling econtent to these services and 50% not selling yet but interested. Just over 19% are not interested in pursuing this option.

15. When acquiring titles, do you acquire world rights for digital formats?

Answer Options	Response Percent	Response Count
Yes, always	63.9%	23
Yes, sometimes	25.0%	9
No	11.1%	4
	answered question	36
	skipped question	6

16. When selling rights, do you sell rights to digital formats in: (check all that apply)

Answer Options	Response Percent	Response Count
English outside Canada	56.3%	9
French in Canada	56.3%	9
French outside of Canada	75.0%	12
German	50.0%	8
Swedish	43.8%	7
Danish	43.8%	7
Chinese	43.8%	7

Japanese	43.8%	7
Other (please specify)		6
	answered question	**16**
	skipped question	**26**

Other:

- We would be open to selling translation rights for e-editions, but have not yet done so, to my knowledge.
- In all languages other than English.
- Only one successful rights deal to date.
- Don't know.
- Korean, Thai, Dutch
- The answer to all of the above (with the possible exception of English outside of Canada) is yes, we will sell digital rights to an acquiring publisher.

17. Have you explored selling your econtent to subscription services such as Scribd or Oyster?		
Answer Options	**Response Percent**	**Response Count**
Yes	30.6%	11
No, but interested	50.0%	18
No, not interested	19.4%	7
	answered question	**36**
	skipped question	**6**

Websites and Blogs

Not surprisingly all respondents who answered this question (although 6 skipped the question) have a corporate website. Some are creating dedicated websites for individual titles but only 8.3% frequently and 30.6% occasionally. Respondents' websites are being updated fairly frequently with 83.3% updating at least weekly. A little over 55% have refreshed their website in the past two years leaving a little under 45% refreshing their sites 3 or more years ago. While at this time 52.8% are selling their digital content directly on their website, comments tell us that many more are planning to do so soon.

Of those who responded to the question (36) 77.8% are offering visitors the option to subscribe to newsletter etc., however 61.1% are not asking for information from their visitors. Those who do ask about the kinds of content they want to hear about, postal code, age and gender. When asked if they send information tailored to their interests, of the 24 respondents 62.5% respondents answered "yes" and 83.3% maintain a database of people who have given permission to be contacted. They are engaging those people with contests, opportunities to review books, incentives and polls. More than 47% say that their website is either extremely or very important in marketing their econtent.

A little more than 52% have a company blog and over 47% of those are posting new posts once a week or more.

18. Do you have a corporate website?		
Answer Options	**Response Percent**	**Response Count**
Yes	100.0%	36
No	0.0%	0
	answered question	**36**
	skipped question	**6**

19. Do you create dedicated websites for individual titles?		
Answer Options	**Response Percent**	**Response Count**
Yes, frequently.	8.3%	3
Yes, occasionally.	30.6%	11
No	61.1%	22
	answered question	**36**
	skipped question	**6**

20. How often are updates added to your corporate website?		
Answer Options	**Response Percent**	**Response Count**
Daily	30.6%	11
2 – 3 times a week	33.3%	12
Weekly	19.4%	7
Monthly	16.7%	6
Rarely	0.0%	0
	answered question	**36**
	skipped question	**6**

21. When did you last refresh the design of your corporate website?		
Answer Options	**Response Percent**	**Response Count**
This year	25.0%	9
Last year	30.6%	11
Within the past 3 years	22.2%	8
More than 4 years ago	22.2%	8
	answered question	**36**
	skipped question	**6**

22. Do you sell your digital content directly to readers on your website?		
Answer Options	**Response Percent**	**Response Count**
Yes	52.8%	19
No	47.2%	17
Comments		8
	answered question	**36**
	skipped question	**6**

Comments:

- But we are planning to by the end of the year.
- We advertise them on the website but they cannot order through the website. Institutional price variations require that customers order through customer service. Ebooks are not downloaded by customers, but are viewed online in their password protected account.
- Not yet but very soon.. within the next couple of months, I believe.
- Very soon
- But we hope to.
- As of one month ago
- But plan to in the near future

23. Do you offer visitors to your website an opportunity to subscribe to/opt into additional information (e.g. newsletters).

Answer Options	Response Percent	Response Count
Yes	77.8%	28
No	22.2%	8
	answered question	**36**
	skipped question	**6**

24. Do you ask for information on any of the following? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Kinds of content they want to hear about	33.3%	12
Postal Codes	19.4%	7
Age	5.6%	2
Gender	2.8%	1
Income	0.0%	0
Don't ask for this information	61.1%	22
Other (please specify)		6
	answered question	**36**
	skipped question	**6**

Other:

- We require only name and email. Optional info: address, city, state/prov, postal code, job title (teacher, librarian, administrator).
- Our form is targeted to educators -- we ask about classroom activity & position
- not applicable.
- Profession and Institutional Association.
- Province, for targeted event invitations.
- Occupation

25. If yes, do you send them offers tailored to their interests?		
Answer Options	**Response Percent**	**Response Count**
Yes	55.0%	11

No	45.0%	9
	answered question	**20**
	skipped question	**22**

26. Do you maintain a database of those who have given permission to be contacted?		
Answer Options	**Response Percent**	**Response Count**
Yes	83.3%	30
No	16.7%	6
	answered question	**36**
	skipped question	**6**

27. Do you engage those people by asking for their input in any of the following ways? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Polls	21.4%	6
Contests	53.6%	15
Opportunity to review books/content	35.7%	10
Incentives for input (e.g. free econtent, a print book)	32.1%	9
N/A	28.6%	8
Other (please specify)		4
	answered question	**28**
	skipped question	**14**

28. How important is your website in marketing your econtent?		
Answer Options	**Response Percent**	**Response Count**
Extremely important	19.4%	7
Very important	27.8%	10
Somewhat important	41.7%	15

Somewhat unimportant	8.3%	3	
Not important at all	2.8%	1	
	answered question		36
	skipped question		6

29. Do you have a company blog?		
Answer Options	**Response Percent**	**Response Count**
Yes	52.8%	19
No	47.2%	17
	answered question	**36**
	skipped question	**6**

30. If yes, how often do you post a new blog?		
Answer Options	**Response Percent**	**Response Count**
More than once a week	15.8%	3
Once a week	26.3%	5
2 x per month	42.1%	8
1 x per month	10.5%	2
Less than monthly	5.3%	1
	answered question	**19**
	skipped question	**23**

Social Media

Respondents have embraced social media and see it as a core of their marketing activity. Over 47% have someone on staff responsible for social media, with others citing a percentage of a person or several people and only 2.8% have not identified a person responsible. They are posting more than once a day at 77.8%, once a day at 15.6%, several times a week at 11.1% and only once a week at 2.8%. Just 2.8% don't use social media.

Of the 35 that answered the question 100% are using Facebook, 88.6% using Twitter, 42.9% using Pinterest and 37.1% using YouTube. Other comments tell us that use of Instagram is on the rise. When asked what the top three social media platforms were that were most important to marketing efforts, respondents cited Facebook as number one, Twitter as number two and Pinterest as number three. However when asked whether these efforts produce tangible, measureable results, over 57% answered “don’t know” with “yes “ coming in at 22.9 and “no” at 20%. Only 18 responded to the question about tools for measuring the success of social media activities and of those 88.9% are using Google Analytics, 66.7% Facebook Insights and 38.9% Hootsuite.

31. Do you have someone on staff responsible for social media? If so, indicate how many?		
Answer Options	**Response Percent**	**Response Count**
1 person	47.2%	17
% of a person	44.4%	16
Several people	5.6%	2
No, no one is responsible for social media	2.8%	1
	answered question	**36**
	skipped question	**6**

32. How often does your company post on social media?		
Answer Options	**Response Percent**	**Response Count**
More than once a day	77.8%	28
Once a day	5.6%	2
Several times a week	11.1%	4
Once a week	2.8%	1
Less than once a week	0.0%	0
We don’t use social media	2.8%	1
	answered question	**36**
	skipped question	**6**

33. If yes, which of the following do you use regularly? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Twitter	88.6%	31
Facebook	100.0%	35

Pinterest	42.9%	15
Google +	25.7%	9
LinkedIn	11.4%	4
Tumblr	0.0%	0
YouTube	37.1%	13
Other (please specify)		7
	answered question	**35**
	skipped question	**7**

Other:
6 using Instagram, 2 commented about using Twitter infrequently and there was one mention each of NetGalley, Wattpad and Goodreads.

34. What are the top three in importance for your marketing efforts?				
Answer Options	**1**	**2**	**3**	**Response Count**
Twitter	14	11	4	29
Facebook	15	17	0	32
Pinterest	0	1	13	14
Google +	0	0	2	2
LinkedIn	1	1	1	3
Tumblr	0	0	0	0
YouTube	1	2	4	7
Other	2	0	4	6
			answered question	**34**
			skipped question	**8**

35. Do you see tangible, measurable sales results from your social media marketing efforts?		
Answer Options	**Response Percent**	**Response Count**
Yes	22.9%	8
No	20.0%	7

Don't know	57.1%	20
	answered question	**35**
	skipped question	**7**

36. If yes, what tools do you use to measure the success of social media marketing efforts? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Google Analytics	88.9%	16
Hootsuite	38.9%	7
Buffer	0.0%	0
Facebook Insights	66.7%	12
BackTweets	5.6%	1
Social Mention	5.6%	1
Other (please specify)		2
	answered question	**18**
	skipped question	**24**

Authors' Involvement with Marketing Activities

Respondents are seeing authors as essential partners in marketing their books with 88.9% feeling that way for both digital and print content and 8.3% for just print content. Only 2.8% (one respondent) stated they don't view authors as marketing partners.

Surprisingly not as many authors as one might think have their own websites or are participating in social media according to respondents. Only 31.4% said that over 50% of their authors had their own websites, 14.3% said over 50% had their own blogs, 28.6% said over 50% had a Facebook presence, and 28.6% said over 50% were active on Twitter. More than 83% of respondents have reciprocal links with authors' websites. Respondents are almost split on providing training on digital platforms with 44.4% providing training and 55.6% not providing it. Only 22.3% are acquiring authors' titles based on their ability to use digital platforms.

37. Do you view your authors as essential partners in marketing?		
Answer Options	**Response Percent**	**Response Count**
Yes, for both digital and print content	88.9%	32
Yes, for print content only	8.3%	3
Yes, for digital content only	0.0%	0
Don't view authors as marketing partners	2.8%	1
	answered question	**36**
	skipped question	**6**

38. What % of your authors have their own:						
Answer Options	**more than 75%**	**between 50 – 74%**	**between 49 – 25%**	**fewer than 24%**	**don't know**	**Response Count**
Websites	3	8	7	12	5	35
Blogs	2	3	6	16	9	36
Facebook page	4	6	10	8	8	36
Twitter account	1	9	7	10	8	35
Pinterest account	0	1	1	9	21	32
Instagram account	0	1	2	8	21	32
Comments						5
					answered question	**36**
					skipped question	**6**

Comments:

- I am guessing Pinterest and Instagram are near zero (and would not likely be applicable to their professional work as one of our authors). The one place we really see authors is on Twitter. We have not explored LinkedIn, but the others are much more personal, not professional, and so not terribly applicable. We are also exploring academia.edu and other academic-oriented sites.
- Unlike with trade publishers, our company commissions nonfiction educational writing on a work-for-hire basis. We mostly do not promote by author.
- Scholarly authors.
- Most newer authors understand their role and have websites and blogs, some social media. The older ones do not.

- A number of our most published authors have a strong social media following. Those who do are a community unto themselves, where they share content by their peers to show their support of the overall program.

39. Do you have reciprocal links with your authors' websites (i.e. do you drive traffic to their sites and they to yours)?		
Answer Options	**Response Percent**	**Response Count**
Yes, with most authors	30.6%	11
Yes, with some authors	52.8%	19
No	16.7%	6
	answered question	**36**
	skipped question	**6**

40. Do you provide any training/coaching for your authors on how to use digital platforms to help market their content?*		
Answer Options	**Response Percent**	**Response Count**
Yes	44.4%	16
No	55.6%	20
Comment		6
	answered question	**36**
	skipped question	**6**

41. Are you acquiring authors because of their ability to use digital platforms?		
Answer Options	**Response Percent**	**Response Count**
Yes, always	5.6%	2
Yes, sometimes	16.7%	6
No	77.8%	28
	answered question	**36**
	skipped question	**6**

Reader Relations

Respondents are working at and making great strides in reaching out to their readers. Over 69.4% are researching where their readers are online (websites, blogs and social networks) and over 80% are identifying key influencers in these areas and offering them special promotions and incentives. Only 44.4% are using electronic services to distribute advance reading copies. Over 58% think that their readers are most likely to be looking at 49th Shelf, 55.6% think they are looking at Goodreads, 41.7% are looking at Quill & Quire, 36.1% are looking at PW and 30.6% at Booklist. School Library Journal and CHOICE showed up several times in "other".

42. Do you regularly research where your readers are online (websites, blogs, social networks like Goodreads)?

Answer Options	Response Percent	Response Count
Yes, always	11.1%	4
Yes, sometimes	58.3%	21
No	30.6%	11
	answered question	**36**
	skipped question	**6**

43. Have you identified key influencers (websites, bloggers, individual readers, etc.) who communicate about content relevant to your readers?

Answer Options	Response Percent	Response Count
Yes	80.6%	29
No	19.4%	7
	answered question	**36**
	skipped question	**6**

44. If yes, do you have special promotions/incentives for those influencers (e.g. review copies of books)?

Answer Options	Response Percent	Response Count
Yes	77.4%	24
No	22.6%	7
Other (please specify)		4
	answered question	**31**

	skipped question	11

Other:

- This is an area we need to develop - I say yes, meaning "somewhat." We do run contests and specials on a couple of key blogs and websites.
- copies of books to educational reviewers
- Working on it.
- Sometimes.
- Bloggers and NetGalley users.

45. Do you use a service (e.g. NetGalley) to distribute review copies/ARCs of your ebooks?

Answer Options	Response Percent	Response Count
Yes	44.4%	16
No	55.6%	20
	answered question	36
	skipped question	6

46. Which of the following review/social network sites is your target reader audience most likely to use? (check all that apply)

Answer Options	Response Percent	Response Count
Goodreads	55.6%	20
Kirkus Review	25.0%	9
49th Shelf	58.3%	21
Quill & Quire	41.7%	15
PW	36.1%	13
Booklist	30.6%	11
N/A	13.9%	5
Other (please specify)		10
	answered question	36
	skipped question	6

Other:

- I am not sure ... a big market for us is libraries (though I suppose this is not a "reader audience," so CHOICE reviews online are very important for our books. As are more targeted subject area sites (Blacklocks, NiCHE).
- CHOICE; NYRB
- School Library Journal, We Are Teachers, CM magazine, Midwest Book Review
- Atlantic Books Today
- SLJ
- CHOICE (ALA scholarly), School Library Journal
- PLEASE NOTE, WE ARE A FRANCOPHONE PUBLISHER SO MANY OF YOUR OPTIONS DO NOT APPLY
- We make a concerted effort to market through all of these outlets and more, particularly SLJ, YALSA, etc.
- CM - Canadian Materials

Econtent Pricing

Of the 35 who responded to the question almost 66% are experimenting with promotional prices for econtent and of these 17 (68% of those who responded to the question) are working with vendors to establish promotional pricing. Only 37.1% are experimenting with bundling (combining econtent with print content for a special price) but of these 75% report "moderate" to "great" results. In the comments section several more reported that they are just starting some of these activities.

Over 48% have tried offering econtent for free as part of a marketing strategy. They are offering: excerpts 55.6%, entire ebook 50%, special econtent 38.9% and ebook free with purchase of print book 33.3% (note there were 18 responses to this question).

The pricing difference between ebooks and **trade paper** print book is:

- 40% = 21-35% less than print
- 28.6% = over 36% less than print
- 11.4% = 10-20% less than print
- 11.4% = ebook same price as print

The pricing difference between ebooks and **hard cover** print books is:

- 22.9% = over 36% less than print
- 20% = 21-35% less than print
- 8.6% = 10-20% less than print
- 2.9% = ebook the same price as print
- 2.9% = e book free

Apparently only 6 of the respondents are working with **mass market paperbacks** and they are selling their ebooks as follows:

- 8.6% = 21-35% less than print
- 5.7% = over 36% less than print
- 2.9% = 10-20% less than print

Over 71% of the 20 who answered the question are selling ebooks to libraries. Of that 65% are pricing at the same price as to the consumer, 30% are pricing at "a multiple of the consumer price that allows unlimited uses and doesn't expire", 15% are pricing at "a multiple of the consumer price that allows a limited number of uses and/or expires after a set period". No one chose the option of pricing at "a multiple of the consumer price that allows unlimited uses but expires after a set period".

47. Do you experiment with various promotional prices for your econtent?		
Answer Options	**Response Percent**	**Response Count**
Yes	65.7%	23
No	34.3%	12
	answered question	**35**
	skipped question	**7**

48. If yes, do you work with your digital sales vendors to establish promotional pricing?		
Answer Options	**Response Percent**	**Response Count**
Yes	68.0%	17
No	32.0%	8
	answered question	**25**
	skipped question	**17**

49. Have you experimented with bundling (combining econtent and print content for a special price)?		
Answer Options	**Response Percent**	**Response Count**
Yes	37.1%	13
No	62.9%	22
	answered question	**35**
	skipped question	**7**

50. If you have experimented with bundling, what were the results overall?		
Answer Options	**Response Percent**	**Response Count**
Great	25.0%	3
Moderate	50.0%	6
Not sure	25.0%	3
Other (please specify)		3
	answered question	**12**
	skipped question	**30**

Other:

- Just starting.
- Not great! Response was very minimal.
- Thinking about this with new books for fall 2014 and 2015.
- Rollout for Fall 2014 titles so no data yet

51. Have you tried offering econtent for free as part of your marketing strategy?		
Answer Options	**Response Percent**	**Response Count**
Yes	48.6%	17
No	51.4%	18
	answered question	**35**
	skipped question	**7**

52. If yes, what have you tried offering? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Ebook free with purchase of print book	33.3%	6
Excerpts	55.6%	10
Entire ebooks	50.0%	9
Special econtent that is created to promote other content?	38.9%	7

Other (please specify)		2
	answered question	**18**
	skipped question	**24**

53. What is the approximate % difference between your Trade Paper print books and your ebooks pricing?		
Answer Options	**Response Percent**	**Response Count**
Ebook 0 – 10 % less than print book	0.0%	0
Ebook 10 – 20 % less than print	11.4%	4
Ebook 21 – 35 % less than print	40.0%	14
Ebook over 36% less than print	28.6%	10
Ebook price is the same as print price	11.4%	4
Ebook free	0.0%	0
N/A	8.6%	3
Other (please specify)		2
	answered question	**35**
	skipped question	**7**

Other:

- Retail price points and library price points.
- I'm not sure - not my department.
- Current professional pdf books are full price; new ones will be about 25-33 percent of paperback.

54. What is the approximate % difference between your Hard Cover print books and your ebooks pricing?		
Answer Options	**Response Percent**	**Response Count**
Ebook 0 – 10 % less than print book	0.0%	0
Ebook 10 – 20 % less than	8.6%	3

print		
Ebook 21 – 35 % less than print	20.0%	7
Ebook over 36% less than print	22.9%	8
Ebook price is the same as print price	2.9%	1
Ebook free	2.9%	1
N/A	42.9%	15
Other (please specify)		4
	answered question	**35**
	skipped question	**7**

Other:

- Our hardcovers are library editions, so they are priced high, as are our library e-books. We price our library ebooks 10% higher than hardcover.
- The educational ebook market uses a different pricing model than trade because there are multiple users, not a single user.
- ebook price drops when paperback released and gap grows.
- I'm not sure - not my department.
- Produce only a few hard covers for libraries, schools ... not likely to publish many in future

55. What is the approximate % difference between your Mass Market print books and your ebooks pricing?		
Answer Options	**Response Percent**	**Response Count**
Ebook 0 – 10 % less than print book	0.0%	0
Ebook 10 – 20 % less than print	2.9%	1
Ebook 21 – 35 % less than print	8.6%	3
Ebook over 36% less than print	5.7%	2
Ebook price is the same as print price	0.0%	0
Ebook free	0.0%	0
N/A	82.9%	29

Other (please specify)		0
	answered question	**35**
	skipped question	**7**

56. Do you sell ebooks to libraries?		
Answer Options	**Response Percent**	**Response Count**
Yes	71.4%	25
No	28.6%	10
	answered question	**35**
	skipped question	**7**

57. If yes, what is your pricing based on?		
Answer Options	**Response Percent**	**Response Count**
The same per book price as for consumers	65.0%	13
A multiple of the consumer price that allows unlimited uses and doesn't expire	30.0%	6
A multiple of the consumer price that allows unlimited uses but expires after a set period	0.0%	0
A multiple of the consumer price that allows a limited number of uses and/or expires after a set period	15.0%	3
Other (please specify)		11
	answered question	**20**
	skipped question	**22**

Other:

- It depends ... pricing is all over the place as there are many different models (single-user, multiple-user, subscription, PDA, STL)
- Varies by book.

- We distribute our ebooks to companies that use their own platforms to sell to libraries.
- Same as print.
- Don't know.
- We price all our ebooks to libraries at one price (usually) but also based on use at the library.
- I'm not sure - not my department.
- Standard library pricing for each title regardless of print price.
- Details not yet worked out.
- NEGOTIATING AT THIS POINT, SO CAN'T ANSWER FOR SURE
- Sometimes the price will be the same as print pricing as well.
- Under discussion and negotiation.

Digital Content Marketing

Of the 21 who responded to the question 76.2% are using book trailers to market digital content, 66.7% are using author videos and 23.8% are using podcasts. Others are using mobile apps and webcasts/webinars to a lesser degree and it looks like some are just about to try some of these tactics. Author videos and book trailers are working the best.

Respondents are participating in collective marketing opportunities with 51.4% participating in the Kobo Indie Store, 40% in the BookNet Canada CataList Catalogue and 28.6% in the 49th Shelf Ebooks Promotion. Thirty seven percent have not participated. The Kobo Indie Store promotion was rated as very effective, effective and somewhat effective by 11 of the 18 responses. BookNet Canada CataList Catalogue was rated as effective and somewhat effective by 9 of the 13 responses. The 49th Shelf Ebooks Promotion was rated effective and somewhat effective by 3 of the 11 responses. Many stated they didn't know about the effectiveness of these promotions. Would they participate again?: 89.5% said yes for Kobo Indie Store, 68.4% said yes for BookNet Canada CataList Catalogue and 49th Shelf Ebook Promotion.

Mobile marketing is an area that respondents are not venturing into as yet. No one reported having a mobile marketing strategy but 34.3% are "just exploring".

58. Are you using any of the following to market your digital content? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Mobile apps	14.3%	3
Book trailers	76.2%	16
Author videos	66.7%	14
Podcasts	23.8%	5
Webcasts/webinars	9.5%	2
Other (please specify)		5
	answered question	**21**

skipped question	**21**

Other:

- Only one book trailer done. We've not invested in others as not sure if appropriate for our publications.
- Not yet.
- For trade paperback on website. May consider in future.
- Podcasts coming in fall 2014.
- Book talks.

59. If yes, please indicate the top three that are working best for you.				
Answer Options	**1**	**2**	**3**	**Response Count**
Mobile apps	1	1	1	3
Book trailers	6	4	2	12
Author videos	6	3	4	13
Podcasts	2	2	0	4
Webcasts/webinars	1	0	0	1
Other	1	0	0	1
			answered question	**17**
			skipped question	**25**

60. Have you participated in any of the following eBOUND collective marketing opportunities? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Kobo Indie Store	51.4%	18
BookNet Canada CataList Catalogue	40.0%	14
49th Shelf Ebooks Promotion	28.6%	10
Have not participated	37.1%	13
	answered question	**35**
	skipped question	**7**

61. If yes, please rate the effectiveness of each.						
Answer Options	Very Effective	Effective	Somewhat Effective	Not Effective	Don't Know	Response Count
Kobo Indie Store	1	5	5	3	4	18
BookNet Canada CataList Catalogue	0	4	5	1	3	13
49^{th} Shelf Ebooks Promotion	0	1	2	1	7	11
					answered question	**20**
					skipped question	**22**

62. Would you participate again? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Kobo Indie Store	89.5%	17
BookNet Canada CataList Catalogue	68.4%	13
49th Shelf Ebooks Promotion	68.4%	13
	answered question	**19**
	skipped question	**23**

63.Do you have a mobile marketing strategy?		
Answer Options	**Response Percent**	**Response Count**
Yes	0.0%	0
Just exploring	34.3%	12
No	65.7%	23
	answered question	**35**
	skipped question	**7**

64. If yes, describe your mobile marketing activities.	Response Percent	Response Count
Answer Options	0.0%	0
	skipped question	**42**

New Business Models Research/Analytics

Many are experimenting with new business models for marketing econtent with 37.1% working with a subscription model and 8.6% with serialization. One "other" comment stated that they are experimenting with a "daily reads" model.

In terms of using analytic tools to measure the impact of activities on their websites, 65.7% answered yes and 34.3% said no but over 48% of the 33 who responded to the question are either very comfortable or somewhat comfortable with their capacity to use analytics in a meaningful way.

Most have access to sales reports (94.3%) with 37.1% receiving them on a weekly basis, 42.9% on a monthly basis and 28.6% receiving them on a daily basis. Close to 43% are using sales reports from eBOUND Canada. Over 77% find sales reports helpful in refining their marketing strategy.

65. Are you experimenting with any of the following new business models for marketing your econtent? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Subscription model	37.1%	13
Serialization	8.6%	3
N/A	62.9%	22
Other (please specify)		1
	answered question	**35**
	skipped question	**7**

Other:

- Subscription model only for libraries.
- Slicing up content for "daily-reads" type vendors.

66. Are you regularly using analytic tools (e.g. Google Analytics) to measure the impact of what you are doing on your website(s).		
Answer Options	**Response Percent**	**Response Count**

Yes	65.7%	23
No	34.3%	12
	answered question	**35**
	skipped question	**7**

67. How comfortable are you with your capacity to use your analytics in a meaningful way?		
Answer Options	**Response Percent**	**Response Count**
Very comfortable	12.1%	4
Somewhat comfortable	36.4%	12
Neither comfortable or uncomfortable	18.2%	6
Somewhat uncomfortable	18.2%	6
Quite uncomfortable	15.2%	5
	answered question	**33**
	skipped question	**9**

68. Do you have access to sales reports directly from vendors? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Yes, daily	28.6%	10
Yes, weekly	37.1%	13
Yes, monthly	42.9%	15
Yes, on demand	34.3%	12
No	5.7%	2
	answered question	**35**

	skipped question	**7**

69. Do you use sales reports from eBOUND?		
Answer Options	**Response Percent**	**Response Count**
Yes, often	20.0%	7
Yes, sometimes	22.9%	8
No	57.1%	20
	answered question	**35**
	skipped question	**7**

70. Do you find your sales reports useful in refining your marketing strategy?		
Answer Options	**Response Percent**	**Response Count**
Yes, absolutely	17.1%	6
Yes, somewhat	60.0%	21
No	22.9%	8
	answered question	**35**
	skipped question	**7**

Sales/Distribution Channels for Digital Content

Most respondents (40.6%) are distributing to various sales channels both directly and by using a service. The remainder just distribute directly (25%) or through a service (34.4%). The top 5 places they are distributing directly to are: Kobo (70%), Amazon (60.%), Google (60.%), Apple (55%) and Barnes and Noble (45%).

The top 5 library/institutional aggregators that they have licensed to are: Canadian Electronic Library (43.8%), Google (28.1%), Ebrary (28.1%), MyiLibrary (21.9%) and NetLibrary (12.5%). Just under 44% are regularly conducting sales meetings with ebook vendors but over 56% are not.

Surprisingly only 37.5% are promoting pre-publication and pre-orders for ebooks and coincidentally the same percentage have successfully negotiated promotional placement for econtent with ebook vendors.

The top three marketing tactics for enhancing sales of econtent are: featured placement by e-vendor, promotional pricing by e-vendor and reviews.

71. How do you distribute to the various sales channels?		
Answer Options	**Response Percent**	**Response Count**
Directly	25.0%	8
Use a service	34.4%	11
Both	40.6%	13
Other (please specify)		0
	answered question	**32**
	skipped question	**10**

72. If you distribute directly, which of the following are you working with? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Amazon	60.0%	12
Kobo	70.0%	14
Apple	55.0%	11
Google	60.0%	12
Barnes and Noble	45.0%	9
Diesel	0.0%	0
OverDrive	50.0%	10
Baker & Taylor	50.0%	10
Follett K-12	35.0%	7
Follett Higher Ed	20.0%	4
EBSCO	45.0%	9
Copia	10.0%	2
Other (please specify)		7
	answered question	**20**
	skipped question	**22**

Other:

- JSTOR
- Don't know.
- BitLit
- Not sure about these.
- Direct professional sales from dedicated site and our own. However, the new books will be ePub and will be distributed via a third party.
- BitLit, Brainhive,
- Kobo as of very soon.

73. Which of the following library/institutional aggregators have you licensed to? (check all that apply)		
Answer Options	**Response Percent**	**Response Count**
Canadian Electronic Library	43.8%	14
NetLibrary	12.5%	4
Ebrary	28.1%	9
MyiLibrary	21.9%	7
Questia	3.1%	1
Google	28.1%	9
N/A	46.9%	15
Other (please specify)		5
	answered question	**32**
	skipped question	**10**

Other:

- EBSCO
- Ebsco (NetLibrary was acquired by them years ago). JSTOR, Google is not a library aggregator
- Don't know
- Follett
- I'm not sure - not my department
- DEMARQUE, BIBLIOPRESTO

74. Are you/or your service regularly conducting sales meetings with ebook vendors?		
Answer Options	**Response Percent**	**Response Count**

Yes, regularly	15.6%	5
Yes, sometimes	28.1%	9
No	56.3%	18
	answered question	**32**
	skipped question	**10**

75. Do you promote pre-publication and take pre-orders for your ebooks?		
Answer Options	**Response Percent**	**Response Count**
Yes	37.5%	12
No	62.5%	20
	answered question	**32**
	skipped question	**10**

76. Have you successfully negotiated promotional placement for econtent with any of your ebook vendors?		
Answer Options	**Response Percent**	**Response Count**
Yes	37.5%	12
No	62.5%	20
	answered question	**32**
	skipped question	**10**

77. Reflecting on the past 2 years, what are the top three marketing tactics for you in enhancing sales of econtent?				
Answer Options	**1**	**2**	**3**	**Response Count**
First page positioning on your website	1	0	0	1
Promotion by e-vendor: Featured placing	11	3	2	16

Promotion by e-vendor: Email blasts	3	2	2	7
Promotion by e-vendor: Vendor blog	0	3	0	3
Promotion by e-vendor: Promotional pricing	1	5	8	14
Bestseller lists	0	1	2	3
Reviews	3	6	1	10
Social media buzz	4	2	3	9
Other (please specify)				2
			answered question	**23**
			skipped question	**19**

Other:

- Direct emails.
- Does not apply as yet. We sell mostly trade books, coffee table books and a few professional books. Do not want e-books of much of back list... moving forward will produce trade and e-book simultaneously, but not for hard cover or coffee table books.

Current Priorities

Relationships with e-vendors, websites, social media and enhancing discoverability and were the top four marketing priorities for marketing econtent. The top three challenges in marketing econtent are: resources to experiment, lack of time to research what others are doing, and organizational lack of understanding of opportunities and priorities.

78. What are your top three priorities in marketing your econtent?				
Answer Options	**1**	**2**	**3**	**Response Count**
Website	10	2	7	19
Social Media	1	10	5	16
Relationships with evendors	12	2	2	16
Enhancing discoverability (metadata, SEO)	5	8	4	17
Researching/Finding where your readers are online	2	2	2	6
Working with your authors	0	4	3	7

Identifying and working with key influencers	0	1	3	4
Using analytics to determine what is working	0	2	3	5
Other	1	0	0	1
			answered question	**31**
			skipped question	**11**

79. What are your top 3 challenges (non-monetary) in effectively marketing your econtent?

Answer Options	**1**	**2**	**3**	**Response Count**
Organizational lack of understanding of opportunities/priorities	5	9	8	22
Ability to attract, retain digital savvy staff	0	0	0	0
Lack of time to research what others are doing	8	5	11	24
Resources to experiment	11	10	1	22
Ability to use analytics in a meaningful way	3	4	6	13
Other	2	1	1	4
			answered question	**30**
			skipped question	**12**

80. Are you experimenting with any other approaches that are showing some success? Please describe.

Answer Options	**Response Count**
	3
answered question	**3**
skipped question	**39**

- We currently only have 2 e-books as pdf downloads sold through two websites. High value product that is individually licensed to purchasers. It is sold via professional word-of -mouth. Extremely valuable. no longer sell HC except a minimum of 30 copy purchase. We do sell about 10% as CDs.
- As mentioned previously, Wattpad is one new approach. Engaging new consumer-geared subscription services is another approach we're just starting out with.
- Re effective marketing -- the most urgent need is to develop a direct relationship with key vendors. Working through intermediary distributors does not produce good results. We are also having some success with direct selling to customers.