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The student consumer and the rise of e-textbook platforms

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Briefing paper

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This is the fourth **Higher Education Library Technology** *briefing paper. HELibTech [1] is a free and open community resource which aims to provide a starting point for anyone interested in library technology in Higher Education. This paper was supported by sponsorship from Bibliotech Education. [2] The author retained full editorial control over the content of this paper and maintained an independent and impartial view of the issues.*

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[1] http://helibtech.com/
[2] https://bibliotech.education/

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Contents

The student 'consumer'

In many countries a greater percentage of the population is going to university. In the OECD club of 35 countries, 43 per cent of 25 to 34-year-olds now have degrees. In America the figure is 48 per cent.[1] Unsurprisingly, there is growing emphasis by governments and higher education institutions on meeting student needs and expectations. The UK government considers that a more market-based approach needs to be adopted to provide better student 'choice'. In January 2018 the Office for Students (OfS) was formally established as a regulator for higher education in England to 'promote choice and help to ensure that students are receiving a good deal for their investment in higher education'.[2] Some see this as a 'consumerist' slippery slope towards an increasing 'marketisation' of educational aspirations.[3] Nevertheless, the trend is clear. A recent report for the Society of College, National & University Libraries (Sconul) listed 'students as customers' as one of the five top 'transformational' trends that will impact libraries over the next ten years.[4]

These student consumers are not all happy. In the UK, textbook prices have seen a '69% increase over 5 years, a period that has seen very little inflation',[5] while in the US there has been a '73% increase in textbook costs in the 10 years prior to 2016'.[6] Concern about rising textbook costs is just part of more general worries about value for money. In 2017 a report published by UK2020, an independent centre-right think tank, suggested there is 'growing evidence of just what poor value for money many universities are providing', with students 'cheated of the benefits they were repeatedly assured they could expect in return for their money'.[7] In the foreword to the report Anthony Seldon, Vice-Chancellor at the University of Buckingham, concludes, 'the producer interest reigns. The voice of the consumer, in other words the student, has not been taken greatly into consideration'.

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Many academics and librarians might not agree with the politics of consumerisation, but few think all is well. The student experience has been high on the library agenda for some time. It has been a key driver for significant investment in new library spaces, more student and evidenced based initiatives to align library resources to student-expressed demand, and better software to improve the management of reading lists and resource discovery. Some university libraries are now looking at new ways to manage and deliver what many students see as a core learning resource: the textbook.

The value of textbooks

Students and academic attainment

There is no doubt that students value textbooks. In 2017 the University of Manchester found that over 75 percent of students surveyed agreed to some degree that 'a core

textbook is essential to [their] studies'. [8] The same study indicated that 'higher use of the textbook offered potential correlation with academic attainment' and 'leads to enhanced pedagogy from the perspective of academic faculty'.

Engagement and student satisfaction

The results of *Books Right Here Right Now*, a major strategy project at Manchester University, were unequivocal. A library led e-textbook service leads to 'higher engagement of learning from students, their increased satisfaction with the University and Library, plus addresses the issue of reducing their direct costs'. [9]

The move to digital and more interactive learning

A recent white paper by education platform provider Top Hat advocates the importance of a new digital based approach:

Students' studies have become inextricably linked to personal technology, just like every other aspect of their lives. They conduct much of their research, and complete their assignments, on computers, tablets and smartphones, which means there is value in providing students with digital materials that fully integrate into the tools they already use. [10]

John Donovan, managing director for EMEA at VitalSource, suggests a digital approach offers 'students the opportunity to increase their engagement with the material and work in a collaborative way with their lecturers and peers'. [11] He goes on to say, 'moving into a world of e-textbooks and interactive learning tools can be quite a change'. The move to digital interactive learning resources is also a challenge for libraries. While Sconul advocates the library as 'much more than a passive repository for knowledge', [12] most library resource spending is on e-journals and e-books that remain, for the most part, stubbornly non-interactive PDF versions of their print counterparts.

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The textbook market

An assessment by David Kernohan and Vivien Rolfe of Wonkhe concluded that while textbook publishers are 'all expanding their digital offerings, they remain wedded to print, and their reliance on this legacy operation is beginning to exact a financial toll'. [13]

Globally, major publishers like Pearson, Cengage, and Wiley have suffered significantly lower profits in recent years, partly due to the growing adoption in the US of open textbooks that offer a lower cost option for dissemination of course materials. To increase revenues from their digital offerings, publishers are requiring students to purchase access codes to online features such as assessments, assignments and quizzes. These features, which cost $100 on average, are hidden behind paywalls and expire after the semester, meaning students can't resell them once they have finished the course. Writing in the

Atlantic in January 2018, Laura McKenna warned that the access codes threaten 'to exacerbate the already-high cost of college materials, undermining the used-book market and reshaping the college experience'.[14]

The UK textbook market has also contracted according to a 2016 Publishers Association report cited by Kernohan and Rolfe. While digital textbooks (as e-books) are an expanding component of this market, there is less emphasis on digital supporting materials than in the US.

Approaches to textbook provision

In general, US institutions place more emphasis on textbooks. This is partly because academics (faculty) are more likely to select a single title that most closely relates to the content of the course they are teaching. The title is then recommended to their students who go on to purchase it new or second-hand rather than borrowing it from the library. In

> Libraries have often been reluctant to embark on the general provision of textbooks to meet the demand

Australia, New Zealand and some parts of Europe (including the UK) higher education institutions are more likely to operate on a broader 'reading list' model, supplying students with a list of recommended titles. Students, therefore, tend to encounter textbooks via an academic recommendation on a reading list. As a consequence, the UK, Australia and New Zealand have seen wide adoption of library-centric reading list software. Software such as Talis Aspire and most recently ExLibris Leganto, SirsiDynix BLUEcloud Course Lists and Kortext Keylinks provide a course (sometimes week by week) context to library resources and enable academics to annotate references including the ability to differentiate between 'core' or 'essential' texts and other resources that are less important. These solutions typically integrate with the library management system to inform library acquisition processes and the learning management system (virtual learning environment –VLE) to embed reading lists into the student's learning workflow.

The textbook problem

Students arrive at university today, 'expecting to have all the learning resources required for their course available to them at no extra cost'.[15] However, libraries have often been reluctant to embark on the general provision of textbooks to meet the demand. The UK2020 report cites student complaints: 'not enough books on the reading list in the library' and 'limited copies of books in library'. In the US, Rick Anderson, Associate Dean for Collections and Scholarly Communication at the University of Utah, has characterised this lack of library textbook provision as the 'Textbook taboo'. He went on to say that this approach is no longer sustainable:

At a time when it is increasingly necessary for libraries to find new ways of being mission-critical to their sponsoring institutions, this aversion to textbook provision seems to me increasingly self-defeating. [16]

In *a charter for e-books* Nicholas Lewis, Library Director at University of East Anglia, set out his desiderata. 'Libraries should be able to purchase e-textbooks on a 'one to many' model, just like other e-books'. Nevertheless, he went on to make a significant qualification:

Where students are being expected to carry out sustained reading and activities around a particular e-textbook, and/or where there is particularly 'inventive content . . . being delivered to a high standard'...then there may be occasions where a 'per student' pricing model is appropriate.[17]

The University of Manchester's *Books Right Here Right Now* initiative summarised the key textbook issues as high costs, too few books and e-book business models.[18]

Costs

The high cost of textbooks becomes harder to bear in the light of student fees that, since their introduction in England and Wales in 1998, have increased from £1,000 to over £9,000.

Too few books

One of student's biggest frustrations is the lack of sufficient copies of textbooks available to borrow. Although the University of Manchester library did purchase multiple copies, it judged it neither feasible nor economical to purchase one print copy per student from the existing budget, especially in view of large course cohort sizes.

E-book business models

Two major barriers were identified:

- Firstly, traditional library suppliers have never really been able to provide the key textbooks students required. Publishers have treated the library e-book and textbook markets as distinctly separate entities and have been unwilling to supply libraries with e-textbooks. Their preference has been a direct student retail model, usually via lecturer (faculty) adoption and with a subsequent purchase recommendation of the textbook to their students. The problem extends beyond textbooks. A 2016 study by Jisc, a membership organisation providing digital solutions for UK education and research, discovered that a high percentage of 'core texts' (material identified on a reading list as essential reading) is not available as e-books at all.[19]

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- Secondly, in those instances where a library has been able to purchase an e-textbook, usually via a traditional library supply intermediary, the supply/licensing model has been unsatisfactory for both the library and for students. A number of limitations have led to both an unsatisfactory and complex acquisition model and a number of access issues, often at critical times, for students.

Institutional and library initiatives

In the UK, university libraries have been involved in a number of initiatives that attempt to meet the demand. Providing *electronic* textbooks is seen as part of the solution. For example, the University of Plymouth summarises the benefits of this approach in the following terms:

No more heavy bags of books to carry around, no need to compete with classmates for Library print copies - just everything in one place accessible 24/7 wherever you are in the world. E-Textbooks provide interactive features such as, search within text, highlight content and make and share notes to collaborate with your course mates. They can help support you with wider reading and research around your topic, as well as revise or prepare for tests and assignments.[20]

As part of their e-textbooks scheme delivered in partnership with Kortext, over 80 per cent of first year undergraduates receive their core reading in e-textbook format at no extra charge. The University ensures 'every student has access to the same material by giving our first year students a package of e-textbooks worth £200 on average'.[21] One Plymouth student remarked 'financially it's very beneficial as there are such a large number of text books we could buy but it's not possible with the cost so this is a great resource and one

> Open Textbooks have seen impressive growth and impact in the North American context

that allows me to extend my reading'. The University of Manchester takes a different approach by dealing directly with publishers rather than intermediaries, but its aims are much the same.[22] The project offers an unrestricted model providing an individual e-textbook to each student. To do this they created a bespoke purchasing framework regarding price discounts and usage analytics.

Open textbooks

'Open' licensing allows textbook material to be freely accessed, shared and adapted. The *Open Textbooks* model is gaining traction in the US:

Open Textbooks have seen impressive growth and impact in the North American context, through providers and initiatives such as OpenStax, the Open Textbook Network, BC Campus, and Lumen Learning.[23]

The UK Open Textbooks project aims to test the transferability of the OpenStax and OpenTextbook Network approaches to the UK context. [24]

In addition, Jisc is working with a group of universities to investigate the viability of higher education institutions publishing their own e-textbooks. The fundamental question the project seeks to address is whether the institution as e-textbook creator will help students by making higher education more affordable, and promote a better, more sustainable information environment for libraries, students and faculty. [25]

However, University of Utah's Rick Anderson remains sceptical that these kinds of initiatives will constitute a sufficient solution in the near term. 'The prospect of revolutionizing the

textbook industry with OERs seems like it's going to be a long-term one...the ratio of words to action in this realm remains quite high'. He sees potential for a better outcome by working with publishers, 'especially if it attracts textbook publishers to the project as collaborators'. [26]

The rise of e-textbook platforms

A relatively new group of digital textbook platform providers such as Kortext,[27] VitalSource[28] and Bibliotech [29] delivers publisher e-textbooks directly to student consumers. Indeed, Bibliotech has been characterised as 'the Spotify of textbooks'[30]. These platforms are now being adopted as *institutional* solutions. One of their key advantages is access to e-textbooks and core texts which are not available from conventional 'library suppliers'.

The cooperation of publishers is needed, of course. Bibliotech explained, 'publishers are keen to explore new business models and distribution apps that do not cannibalise existing sales'.[31] Platforms have the opportunity to work with both commercial publishers and open/institutional textbook models. Both are essentially content *producers* and may welcome an approach that can disseminate their textbooks to students. Indeed, these kinds of solutions have potential to develop beyond e-textbooks and core texts to provide a more coherent platform for a wide range of e-books and digital learning resources. For example, in April 2017, to extend its reach, Kortext formed a partnership agreement with Dawson Books a library supply intermediary that provides e-books. The press release emphasises the value of a single platform. 'Students can end up with one Universal bookshelf for all of their textbook and library content where they can take notes, study and collaborate with their colleagues'.[32]

> Publishers are keen to explore new business models and distribution apps that do not cannibalise existing sales

These digital platforms can concentrate on two key and related elements for their value add: the user experience and data analytics.

The user experience

Aside from affordability, neither the *UK Open Textbooks* nor the Jisc *Institution as e-textbook publisher* initiatives has a strong focus on the user experience. Their stated goals are around finding new business models for e-book *production*. For example, the *Institution as e-textbook publisher* project states that the overall objective of the programme is to assess whether the textbooks that have been created provide:

- A more affordable higher education for students
- Better value for money than commercial alternatives
- An improved, more sustainable information environment for all

In contrast, platforms such as Bibliotech, co-founded by David Sherwood while an Oxford University student, bring the user experience very much to the fore. Without the need to focus on the production of e-textbooks, platforms are likely to compete strongly on the

usability features they can offer and the range and suitability of content to meet student needs.

Analytics

The second key element of the digital platform approach is the use of data. John Thompson, Professor of Sociology at the University of Cambridge and Director of the publisher Polity, wrote, 'textbook publishers are not alone in knowing very little about what actually happens in the study space – most professors and lecturers know relatively little as well'.[33] Digital e-text platform providers can track textbook use in detail. Data is highly valued by institutions and publishers. Caution in moving to digital is, in part, a fear of the unknown. Data can help publishers navigate their digital path based on a growing body of evidence. Such a data driven approach might also address some of the concerns of librarians and students. For example, it could enable innovation around digital content and new business models, including less restrictive licensing and Digital Rights Management (DRM). Increasing concerns over data privacy, protection and regulations such as the new General Data Protection Regulation

> The platform can be thought of as a filter that delivers the 'best' taxi ride, accommodation or learning resource. Data is the driving force.

(GDPR) may temporarily slow down the drive to exploit data, but they are unlikely to change the overall direction of travel.

Conclusion: a platform revolution?

Platform models such as Airbnb and Uber are disruptive to established businesses and are becoming ubiquitous.[34] In essence they, 'consummate matches among users and facilitate the exchange of goods, services or social currency – enabling value creation for all participants'.[35] Such an approach could be an important part of a new solution for e-textbooks. The core platform principles are straightforward as illustrated in the diagram below.

The platform can be thought of as a filter. Just as Uber delivers the 'best' taxi ride or Airbnb the 'best' accommodation, the e-texbook platform delivers the 'best' learning resource. Data is the driving force. Data about users and usage helps producers know the best resource to publish and under what pricing and license terms. It could help conventional and institutional publishers innovate richer forms of learning content and better exploit disaggregated content such as chapters.
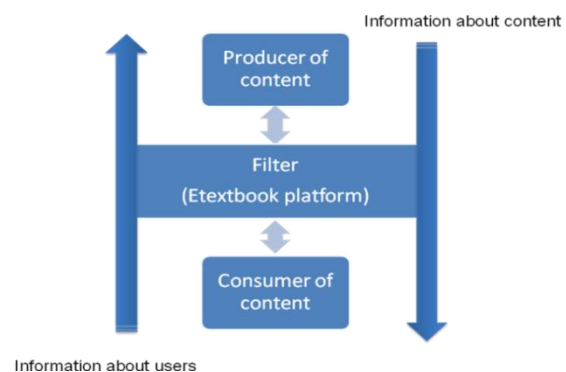
Not producing or owning the content unburdens platforms, enabling them to grow much faster. Using such platforms can reduce costs for conventional and institutional publishers by eliminating the overhead of developing, supporting and continually innovating their own

delivery channels to students. For the library such a platform takes away the need to negotiate directly with publishers. While the Manchester initiative advocated this approach, it noted, 'negotiations with publishers can be both time-consuming and arduous and, until or if, there is wider buy-in amongst the sector a number of recurrent issues will remain, especially around unit price per student'.[36]

Neither students nor libraries are being served well by the current situation. In a response to a survey in early 2017 a librarian remarked, 'my students have to deal with 17 different ebook platforms all with different interfaces and usability options. The frustration level is sky high'.[37] The major publishers are all experimenting with a variety of digital business models, but the Top Hat white paper warns:

They are unlikely to be the ones who decide what the future of textbooks will look like. That decision will get made by students....and by faculty, who are in the best position to know which types of digital materials produce the best learning outcomes.

They'll be helped by new entrants to the marketplace who, unburdened by the legacy operations of print, can innovate at a quicker pace and incorporate feedback from professors and students more swiftly.[38]

Change, perhaps even a revolution, is needed according to Chris Bourg, Director of Libraries at Massachusetts Institute of Technology:

I think that it is past time for us to take digital libraries to the next level...But if this switch, from individuals reading books and articles one at a time in print to individuals reading books and articles one at a time on their own digital device is all we get from the digital revolution, then it won't have been much of a revolution.[39]

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Ken gained his Masters degree from the Information Science Department at City University in London. He is also an alumnus of the Warwick University Business Innovation and Growth Programme. He worked as a librarian for a number of years and has over 20 years' experience in the software business, working in support, project management, implementation, sales and marketing and as executive director and board member. Ken set up his consulting business in 2007 to help make libraries more effective. His consulting activities include help with strategy, innovation, improving the user experience, reviewing/auditing library IT infrastructure and systems, and the procurement of new and replacement systems. His projects encompass e-books, resource management and discovery, open and linked data, repositories, archives and research data management. In addition he provides market intelligence and horizon scanning services for and about the information and library technology sector.

Ken is a member (MCLIP) of CILIP and ALA, and an Advisory Board member for the open access journal *Studies in Arts and Humanities.* He set up and manages a number of free, open community resources including Higher Education Library Technology (HELibTech), Local Government Library Technology (LGLibTech) and Open Specifications for Library Systems (LibTechRFP).

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